Florida Department of Transportation

Trns•port PES

Release 5.7a

Reference Manual

For

Production Projects & Proposals

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Introduction

Trns•port and the Trns•port Suite of Software

Trns•port is the American Association of State Highway and Transportation Officials (AASHTO) information system for managing transportation programs. Info Tech, Inc., developed Trns•port in 1982 to help state highway agencies and attorneys general with highway construction bid collusion and anti-trust investigative efforts. Since then, InfoTech has added significant additional capabilities to provide operational and management information support for State Departments of Transportation and other construction contract activities. Activities include management-level decision support; project cost estimate and proposal preparation, bid letting and award management, and construction contract management. In October 1985, AASHTO purchased Trns•port for licensing to all member agencies to share in the continued development and use of Trns•port software.

There are presently nine Trns•port software modules. Florida DOT is using six of these modules. Their relationships to each other are shown in *Figure 1* on the next page. The ones in use by the Department are:

Trns•port BAMS/DSS (Decision Support System) provides a complete historical database of construction contract information, a set of analysis models, and the capability for ad hoc query and analysis. Using the SAS system's integrated graphics and statistical presentation capability, the BAMS/DSS module provides a fully integrated management decision support system for highway agencies. The Trns•port BAMS/DSS applications include executive information requests, summary reports for management, bid management and monitoring analyses, market analyses and cost indices, project planning, project cost estimation, and legislative presentation.

Trns•port CES (Cost Estimation System) provides Department estimators the means by which to produce various types of Job estimates such as parametric, cost-based, and bid-based estimates. Predefined and ad hoc formulas can be incorporated in the estimating process, and users can assign funding and program information to CES Jobs. The Trns•port CES module can work in combination with the BAMS/DSS module to produce accurate, historically based estimates. It can also work in conjunction with the PES module, sending and receiving project and proposal data that aids in the production of Job estimates.

Trns•port PES (Proposal and Estimates System) provides Department design, contract administration, and estimating staff with a computerized tool to help with project definitions, funding specifications, project cost estimation, contract proposal creation, and bid letting packaging. The detail cost estimate for the Plans, Specifications and Estimate package (P S & E) package and bidding proposal are two key outputs of the PES module. Integrating the PES and BAMS/DSS modules provides automated estimation capabilities with sophisticated statistical analyses of historical bid information.

<u>Trns•port LAS</u> (Letting and Award System) provides bid letting personnel with automated tools to manage the plan and proposal holders lists, bid data entry, bid tabulation and low-bid analysis, and contract award processing. Besides processing the letting activity, one of the key functions performed by the LAS module is vendor file management, including vendor qualification, affiliation, and Disadvantaged Business Enterprise/Women's Business Enterprise (DBE/WBE) information.

<u>Trns•port Expedite</u> (Electronic Bidding System) is designed to work with the PES and LAS modules to streamline the bidding process. The Department uses information form PES to create and distribute electronic proposal or amendment files to prospective bidders. The bidders then input and submit their item bids in a secure, machine-readable format. The Department checks the electronic bids for validity and data errors and then produces a file suitable for loading into LAS.

<u>Bid Express</u> is used in conjunction with Trns•port Expedite. Expedite software is used in bid preparation. Expedite is used to electronically prepare and check bids; then submit them over the Internet using Expedite to connect to Bid Express. Bid Express is a storage site that holds the bids until the bid date, when it is transferred to the Department.

<u>Trns•port SiteManager</u> is a comprehensive construction management system that encompasses the complete construction management process, from contract award through finalization. SiteManager accommodates all levels of construction personnel supporting activities such as construction administration, field record keeping, contract record maintenance, contractor payment processing, materials management, and civil rights monitoring.

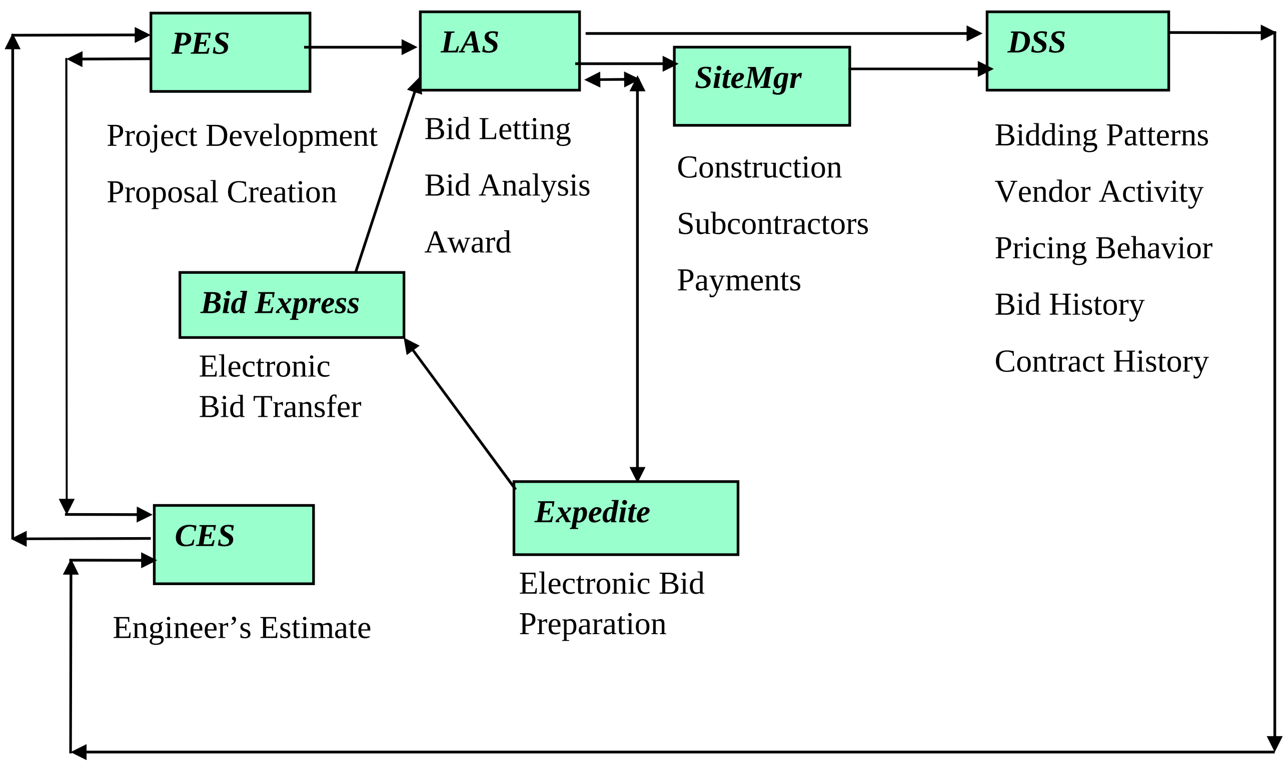


Figure 1

Entity Relationships

Trns•port software can be tailored to the Department's needs. To efficiently install and support the software in varied environments, Trns•port has modular design concepts and programming tools that operate with the least amount of modification.

Trns•port manages data through a series of header records that link to one another. There are three controlling entities in the PES and LAS modules of Trns•port. These are headers called Project, Proposal, and Letting. *Figure 2* illustrates that a Letting Header may have one or more Proposal Headers attached to it, and a Proposal Header may have one or more Project Headers, as well as addenda, attached. The figure also shows that within a project, categories are the first order detail to a project, and Items are subordinate to categories. Keep these relationships in mind when using PES.

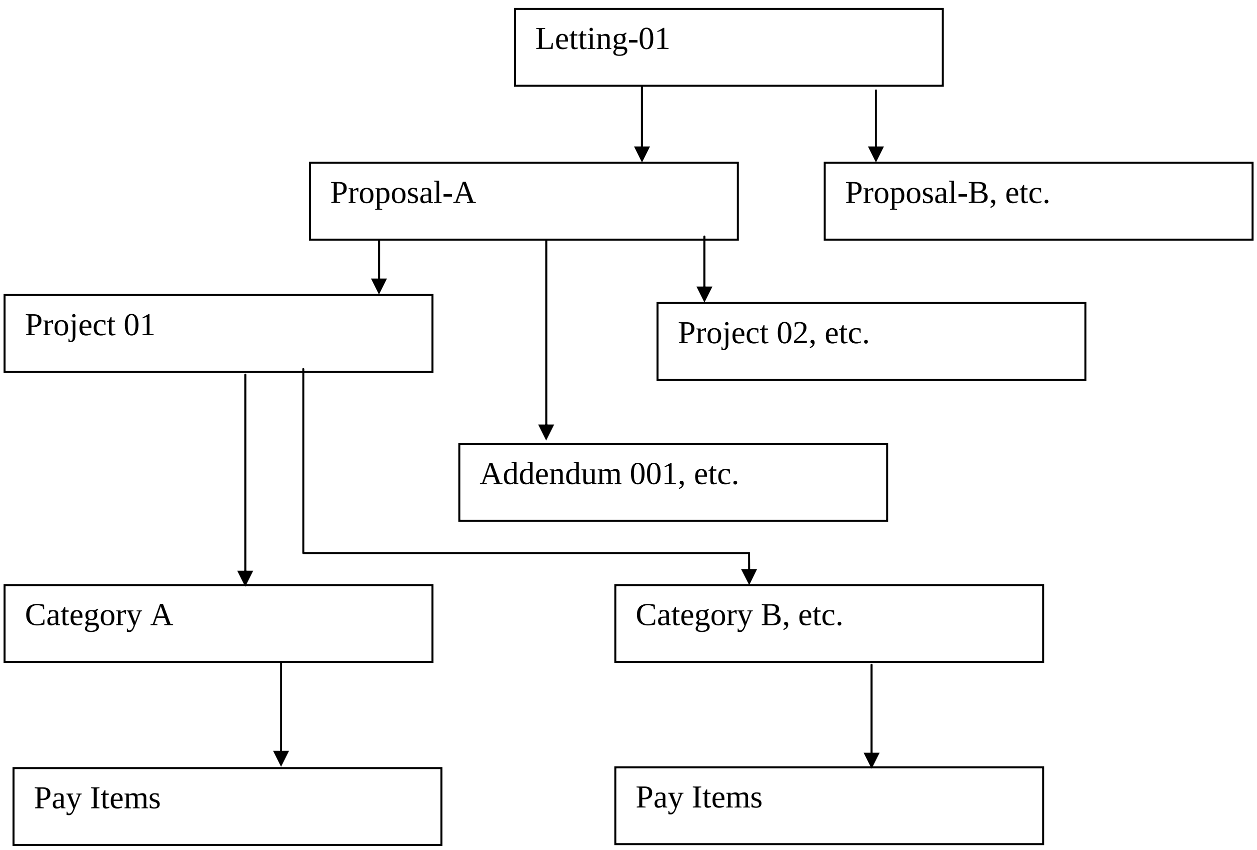
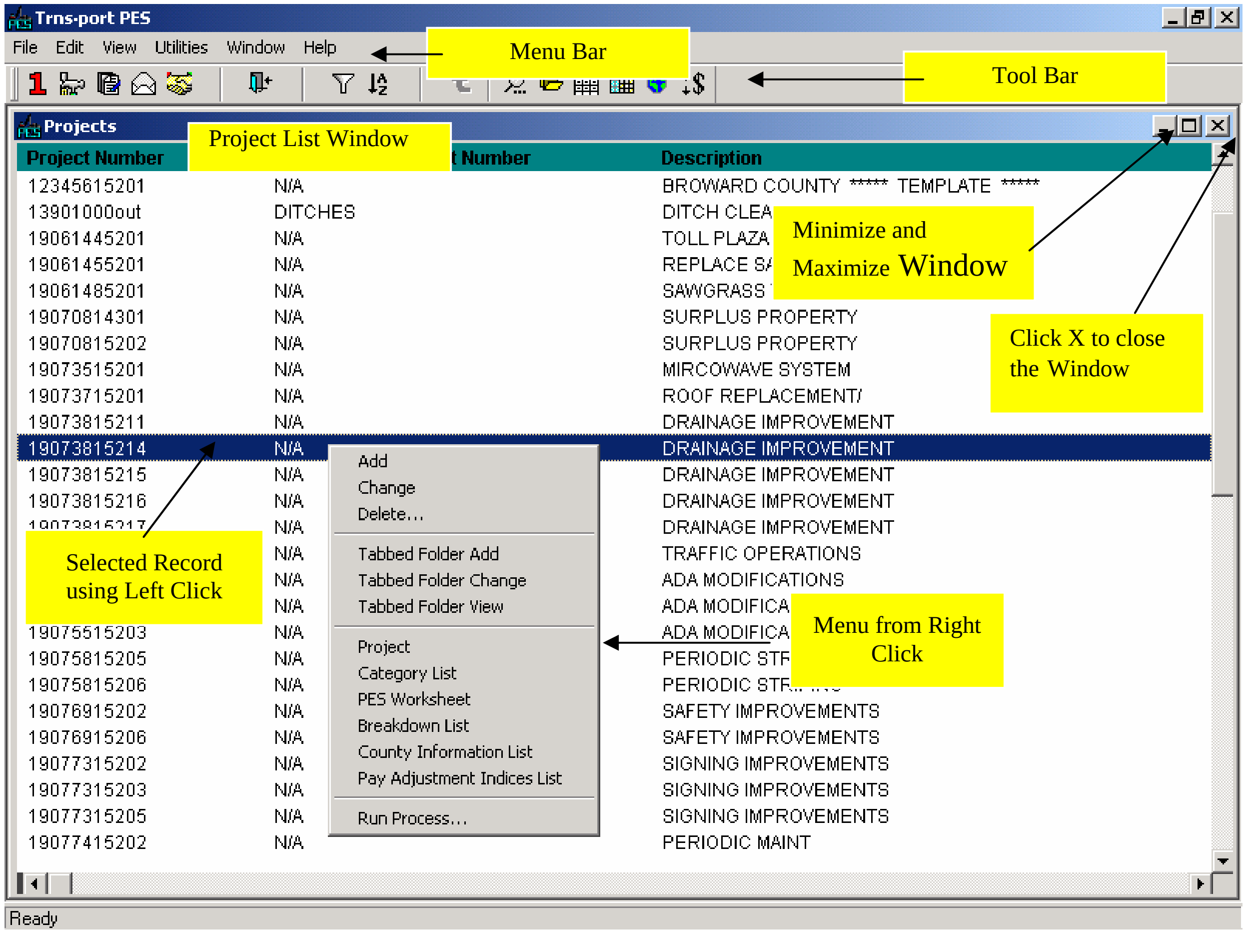


Figure 2

Common Windows Terms and Navigation Methods



Menu Bar – the Menu Bar contains a list of options. For example, click on File and the list of options include Save, Save As, Print, Open, Close, etc.

Tool Bar - the Tool Bar contains buttons that invoke tools that are specific to the window that is currently active.

This button will produce the Project List Window. 

This button will produce the Proposal List Window. 

This button will produce the Lettings List Window. 

This button will produce the Vendor List Window. 

Select (from a menu, tool bar, or list window), means to move the cursor to the option to be highlighted and click the left mouse button once. If the option has an arrow to the right of it, another selection menu will automatically appear. Click the choice.

In this manual, notations such as **File > Reference Tables > Item List** indicate the order of selections from the Menu Bar or the Right Mouse Button Menu.

Click Refers to clicking once with the left mouse button.

Rclick (right click) - Refers to clicking once with the right mouse button. The action will open a menu.

DblClick (double click) - Refers to clicking twice in quick succession with the left mouse button.

Close (the X in the upper right hand corner of a window) – To close a window, click the X that is in the upper right hand corner of the window. If you have been editing what is in the window, you will usually be prompted to either save or close without saving. Choose appropriately. If you choose not to save, all of the changes will be lost.

Minimize (the minus sign in the upper right hand corner of the window) – When this button is clicked, the window will be minimized and deactivated. It will appear at the bottom of the screen. Re-activate the window by clicking on the minimized icon on the bottom of the screen.

Maximize (the button with a square in it on the upper right hand corner of the window) - This button also minimizes and maximizes, but it does not de-activate the window, it merely changes the size of the window.

Check Box – A box that represents a Boolean value (on or off, yes or no). If an X or a check is in the box, then the value is **On** or **Yes**. If there is nothing in the box then the value is **Off**, or **No**.

List Box – A drop down box that presents the valid values for a field. The choices presented usually are from a code table stored within the system. Click an arrow to view the list of choices, and choose a value from the list.

Common Trns•port Terms and Definitions

Batch - A term that refers to a process being submitted and executed in the background without intervention by the user. Reports are an example of processes that execute in batch mode. This also means that a process goes into a queue along with other processes and therefore may have to wait its turn to run so the results may not be immediately available.

Bid-based prices - Estimated prices that are derived from historical data that is stored in Trns•port DSS. These prices are generated for a project or proposal by running a process called Generate Bid-Based Prices.

Bidder - A vendor who bids on a proposal

Category – A grouping of items on a project. For maintenance projects, these would be the task activity numbers.

Contractor - Any entity that does business with the Department. This is synonymous with the term vendor.

Control Group – The assigning of control groups controls who can see which projects and proposals in PES and LAS. There are three places a control group can be assigned. These are **users**, **projects**, and **proposals**. Please see the Security Administrators Guide for complete details and Appendix B to this manual.

Drill-Down Menus - This term refers to menus that appear when a right click is done on a selected record. As the term implies, every time a right click and select is done, a lower level menu or screen appears.

Estimate - A cost estimate for a project. PES can produce three different ones. They are the Preliminary Detailed Estimate, the Proposal Estimate, and the Final Detailed Estimate.

Filter - A function provided in Trns•port to help limit the list of records appearing on the screen.

Generic Fields - In Trns•port this refers to fields that are not used within the core Trns•port software for any processing, but which are available for the user to enter data into and then use in reporting. Should the user wish to customize the Trns•port software, these fields would be available to them.

Item - The smallest unit of work on a project. It is the same as the Department's term Pay Item.

Item List (item Reference Table) **–** This is synonymous with the Department's Master Pay item List or File and contains all of the items that are open for use in each item year.

PES Worksheet – This is a screen provided in spreadsheet format that allows for the entry and maintenance of items for a project.

Planholder – This is a vendor who has received a proposal package. The planholder can be valid for bidding or not.

Procedurally Required Fields – These fields are deemed very important by the Department and therefore should be entered even though the system will not force them to be entered. An example of this is the Control Group field (this field controls who is allowed to view the record in question).

Project - This is synonymous with the Department's financial project.

Proposal - A grouping of one or more projects that is advertised for contract.

Site – A proposal site is an entity which can represent different locations or portions of a project to which time can be assigned. There must be a site 00 record for each project. This will contain the time allowed for the entire project.

System Required Fields – These are fields that are required by the Trns•port software. They must always be entered.

Tabbed Folders -This term refers to a screen where many associated records that belong to a key record are presented in a folder like form. A tabbed folder screen looks much like a filing cabinet with different file folders in it. Each tab presents multiple records in a spreadsheet form. Many of the same types of records may be edited at the same time. All associated records are saved when the tabbed folder screen is closed. For example, the tabbed folder for a project has a tab for general project information, a tab for categories belonging to that project, a tab for funding for the project, etc.

See Appendix A for a more complete glossary of terms used in Trns•port.

Getting Started

Logon to Citrix Metaframe

Trns•port is supported through the Citrix Secure Gateway. The applications execute on a Citrix Metaframe server.

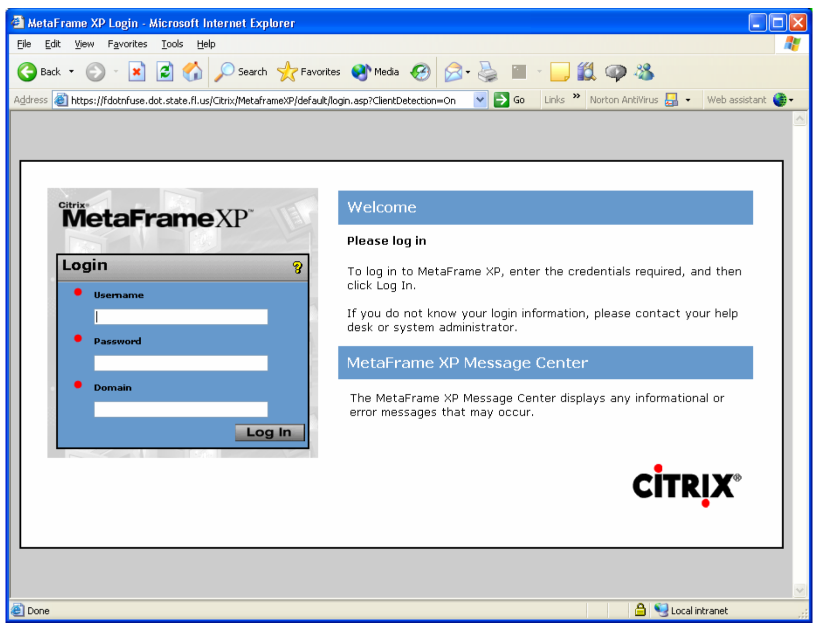
Access to the Citrix Metaframe server is via the Internet when away from the Department, or the Intranet when accessing it from within the Department. Either way, access will then be through the Citrix MetaFrame XP Website.

Prior to attempting a log in, the Application Security Coordinator will have assigned a UserID and password for access to the proper Citrix Metaframe Group.

From your browser, enter:

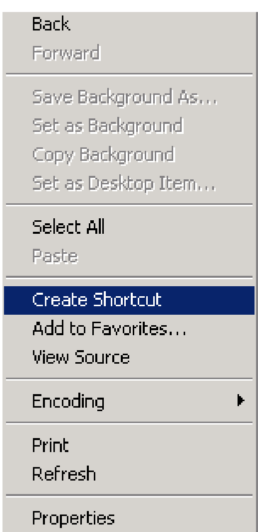
https://fdotnfuse.dot.state.fl.us/Citrix/MetaframeXP/default/login.asp?ClientDetection=On.

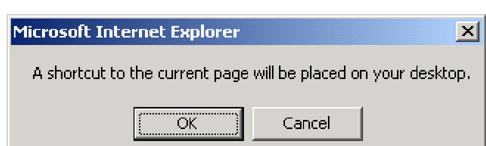
The Citrix Login screen will open.



For quick access to Citrix, create a shortcut for the desktop. From the Login screen,

- Rclick to see the Mouse Button Menu.
- Click **Create Shortcut** as seen below.





This message box will appear.

- Click **OK,** and this icon will be on the desktop.

At the Login screen,

- Enter the UserID,
- Password, and
- Domain as seen in Figure GS.7.

Remember that passwords expire every 65 days.

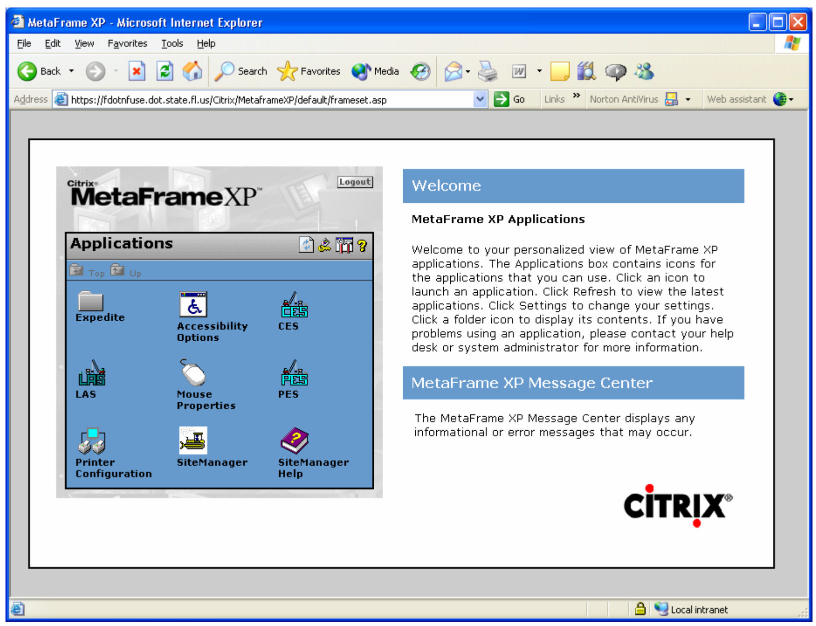
The first time you log in, and as Citrix software is upgraded, you will receive a prompt to install Citrix software. Respond yes and follow the installation prompts.

Logon to Trns•port

At the Citrix Application Portal, see the Trns•port Applications available.

The screen at right shows the applications available to a typical user.

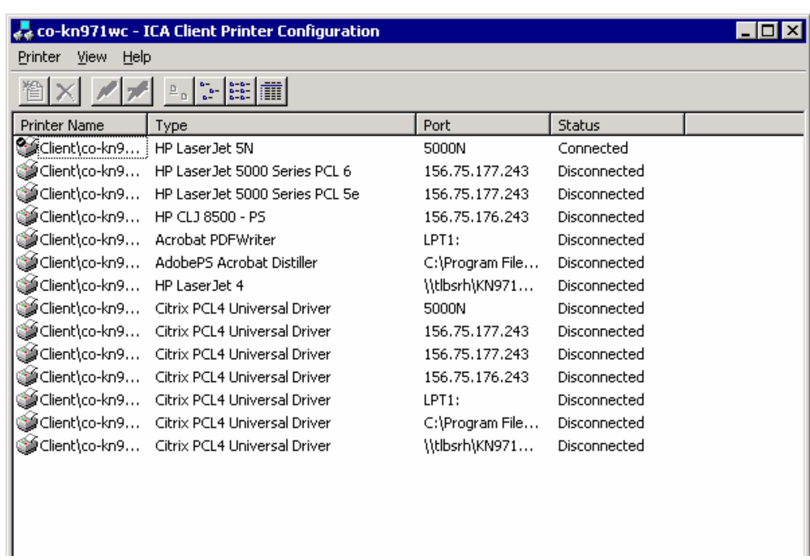
To gain access to other Trns•port applications, see the Application Security Coordinator



Set up Citrix Printers

- Click the **Printer Configuration** Icon to set up the regular printers to work with Citrix Metaframe.

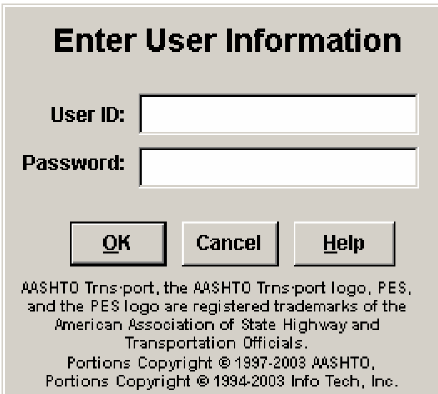
- Click each printer needed, so that the status shows as "connected".



Logon to PES

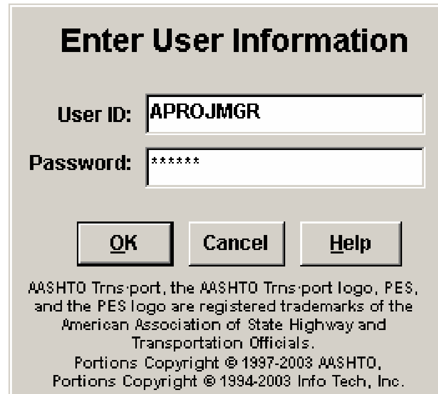
The Security Coordinator will have established the system access and security authority. From time to time, for training or other testing events, you may be granted access to the test environment. At those times, the Trns•port Coordinator or the Office of Information Systems (OIS) staff will control the security and access. In general, you will only have access to the production environment.

- Click the **PES** Icon to open PES.

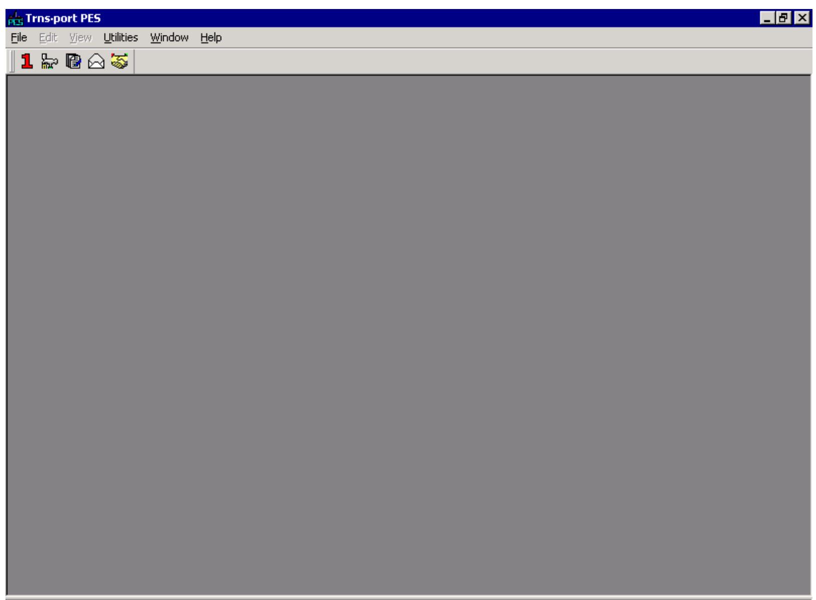


The screen at left will appear.

- Enter the ***User ID***.
- **Tab** to and enter the ***Password***.
- Click **OK**, as seen at right.



A blank Trns•port PES screen will appear. From this screen, access the Proposals List window, from which all proposal management activities will be transacted.



To access the Project List window, press the **Project** button. 

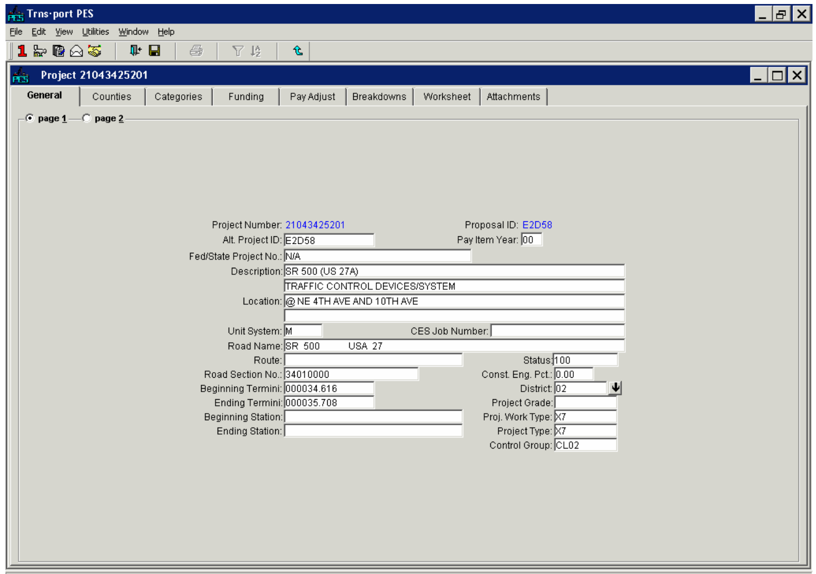
Field Help

As you enter data, and have questions about a particular field, the field help may be very useful. To access the field help in Trns•port PES,

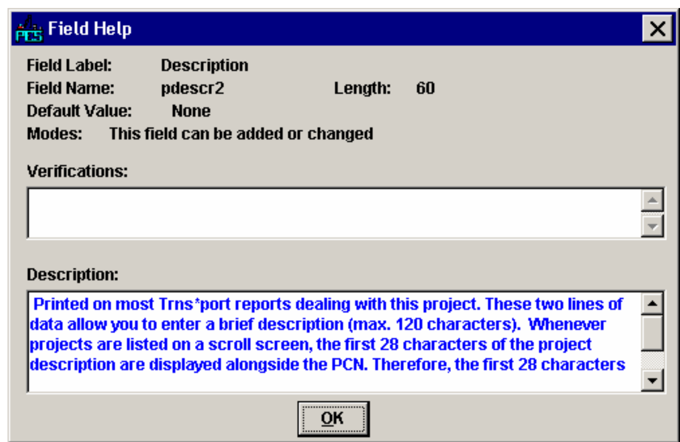
- Rclick in the field of interest to see the Mouse Button Menu.
- Click **Field Help**.

  Or

- Press the **H** key on the keyboard to display field information.

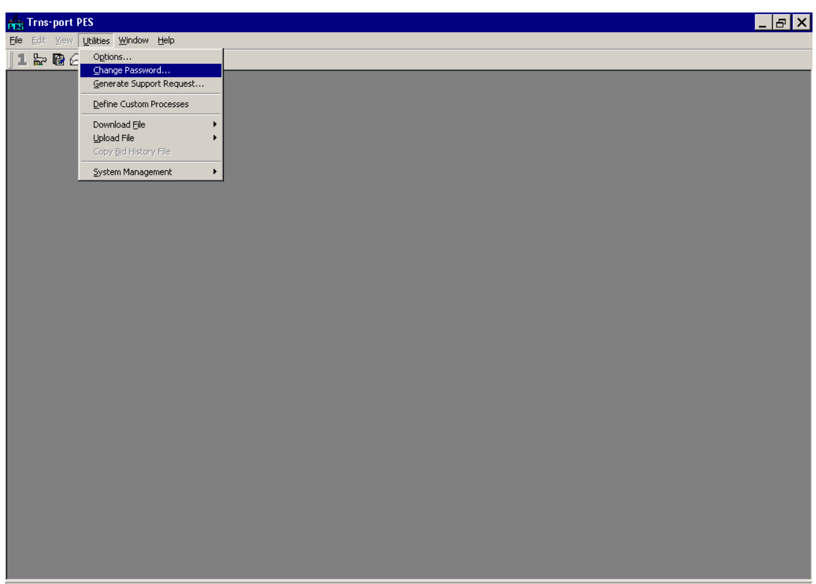


An information screen similar to the one seen here will appear.



Changing passwords

When accessing PES the first time, change the temporary password assigned by the Security Coordinator.



To change the password,

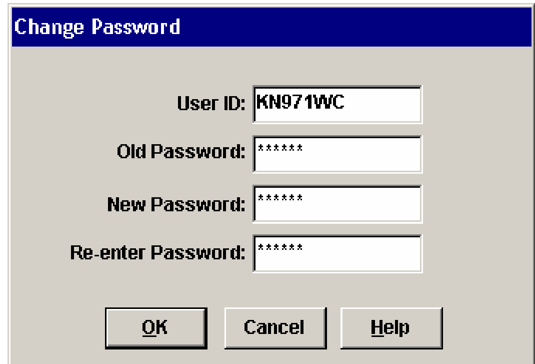
- Click **Utilities > Change Password** from the Menu Bar

The Change Password window will appear.

- Enter the **User Id**.

- Enter the current password in the **Old Password** field.
- Tab to the **New Password** field and type a new password.

It must be at least 6 characters and no more than 13. Use a mixture of letters and numbers.



- Tab to the **Re-enter Password** field and retype the new password.
- Click **OK** to save this password.

Change passwords in accordance with Department policy.

Data Security

To protect the integrity of Trns•port data, take general precautions to safeguard data both from unauthorized access, as well as accidental loss.

PES does not have a time-out feature, whereby the software and hence access to the data are automatically locked. When leaving the PC for an extended period do a normal close of all open windows and close PES. In this way, unauthorized access is not possible.

Data protection during a power outage is also a concern. When using tabbed folder windows in PES, there is a risk of having a project or proposal become "locked" if there is a power loss. In this situation, the database retains information to the effect that you had a project open, and will continue to deny access to users who may need to make changes to the project or proposal. To safe guard against this, avoid keeping multiple tabbed folders open for extended periods.

A Windows General Protection Fault (GPF) error will result in the same effect on folders as a power loss. Any opened tabbed folders will remain locked until those folders are reopened on the same PC that was involved in the GPF incident or the power loss.

Security

In PES, each UserID is assigned one or more roles that have a set of functions (called security tokens) assigned to them. These roles are assigned users by District or Central Office Security Administrators and control what the user may do in the system. In addition, each user is assigned a control group that controls which projects and proposals the user is allowed to see. Each project and proposal in the system is also assigned a control group so the user will be presented only with projects or proposal that "match" his personal control group. A project can be "passed" from one user to another by changing the control group. Please see the Security Administrators Guide for complete details.

Example Control Groups

Type of User	Control Group	
District Estimator	?D03*	? is a positional wildcard.
Production Designer	CD03R312	* is a wildcard for all remaining positions.
Maintenance Designer	MD03 Y302	
Consultant	CD??T123	
District Contracts Office	?L03*	

Project	Control Group	Users who can see Project
A	CD03	District Estimator
B	CD03Z123	District Estimator, Consultant
C	CD03R312	District Estimator, Prod Designer
D	CL03	District Contracts
E	MD03	District Estimator, Maintenance Proj Mgr
F	ML03	District Contracts
G	MD03Y302	District Estimator, Maintenance Designer

Confidentiality

In PES, the estimated price for an item appears on the same screens as the item number and its quantity. This results in some conflicts over the issue of confidentiality. Whoever can see the project can also see the estimate. There is currently no way to separate the estimated prices from the items and quantities. If the prices need to be kept confidential, then the control group that is assigned to that proposal and project must remain in the Estimators control group. If the estimated prices are not confidential at the time, the control group can be set to the Designers control group.

The proposal and project can be passed back and forth as necessary until the prices do become confidential.

Once the proposal has been advertised the Control Group on the project MUST be left as the Contract Administrators control group unless an addendum needs to be processed. Otherwise, an Estimator could change the proposal and project detail and the change would not be reflected in LAS. Any changes that need to be made after advertisement must be made through the Addendum process.

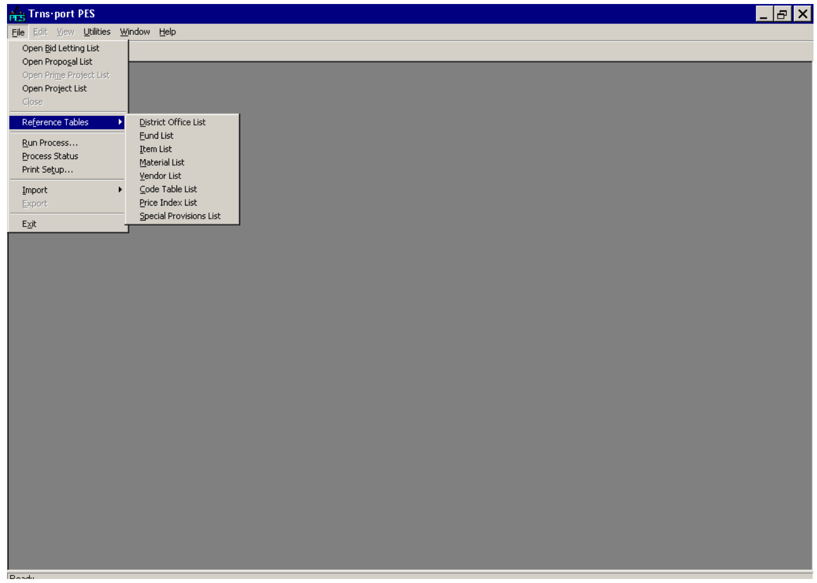
It will be up to each District Office to establish procedures with regard to who has what control groups and when the projects and proposals need to be passed back and forth.

Code and Reference Tables

Code tables and reference tables exist to provide valid values for information stored about projects and proposals. A code table generally consists of only two elements, a code value, and a code description. Reference tables include more information than just the code value and the description. When a code table supports a field on a record, a list box will appear on the screen that allows the user to choose from the list of valid values. List boxes may be accessed by Clicking on the down arrow like this one,  or like this one. 

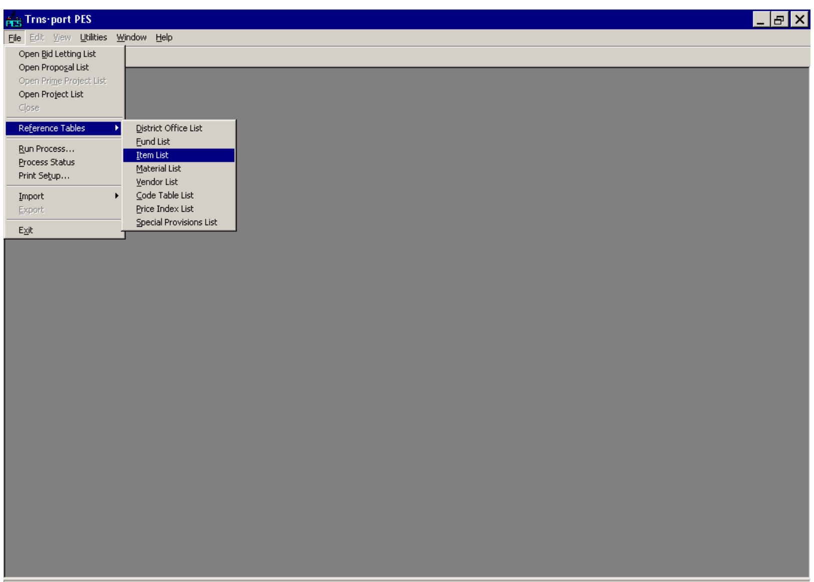
To see the code tables and reference tables in Trns•port, from the Menu Bar

- Click **File** > **Reference Tables** as seen at right.



The next window shows a choice of Code Table Lists and several reference tables.

The Trns•port Coordinator or OIS will maintain code and reference tables, except for the Item List. Changes to the Trns•port code tables must be submitted and approved through the appropriate Issues Task Group. Users can view all of the Code Tables and the item List.



To see the Item List reference table in Trns•port, from the Menu Bar

- Click **File** > **Reference Tables** > **Item List**.

The selection Item List is an example of a reference table. This table is synonymous with the Master Pay Item List. It contains all of the valid items for each item year (Pay Item Year).

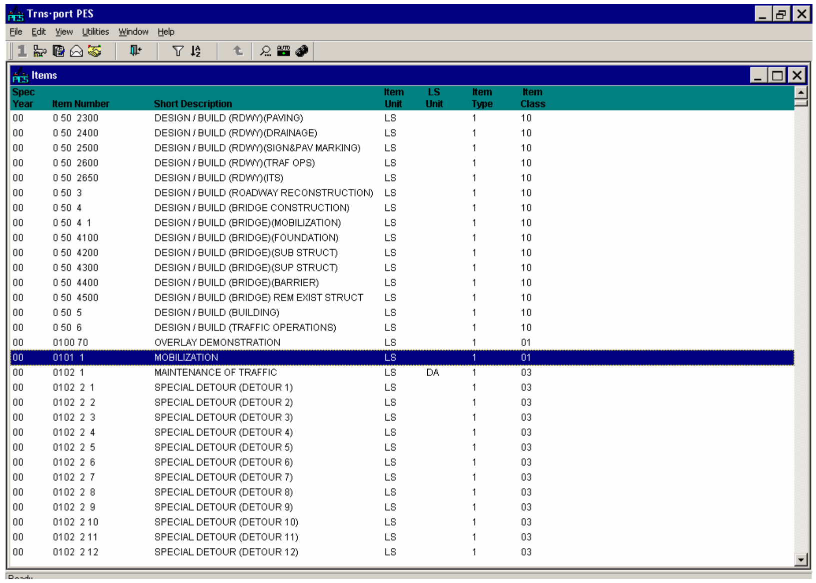
Authorized persons in the Central Estimates Office and Central Maintenance Office maintain this Item List table.

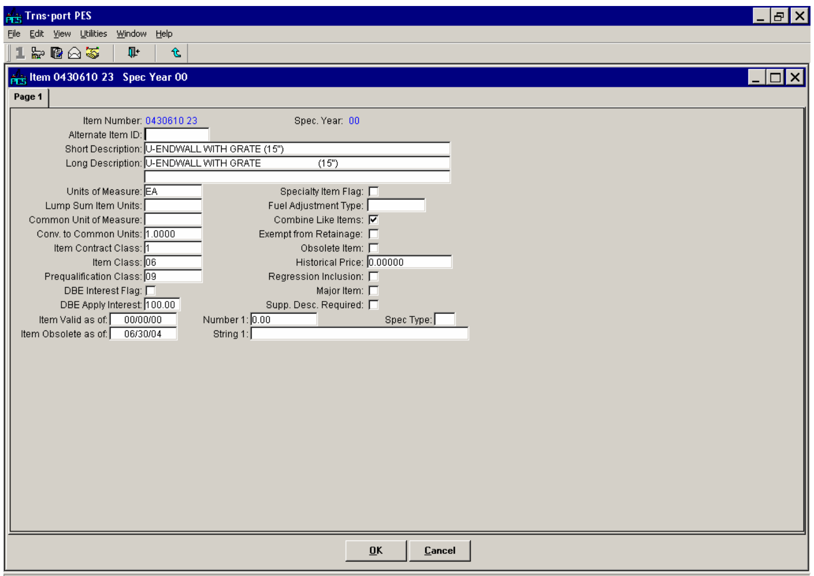
The Item List Reference Table

To view details of a particular item,

- DblClick the **Item**.

Each item has a long and a short description. The long description can be up to 60 characters and will appear on all reports unless the reports are otherwise modified. The short description is a maximum of 40 characters and will appear on any screen that shows item description.





An item can be marked as obsolete by checking the **Obsolete Item** box. Note that there is a field called "**Item Obsolete as of**", but it is not actively linked to project records. If an item has been added to a project prior to becoming obsolete and the project is still active and requires a change, when the Obsolete Item Flag is set, the item will kick out as an error when project changes are saved.

The Combine with Like Items Check Box contains the default value that the item will have in this field when it is added to a project.

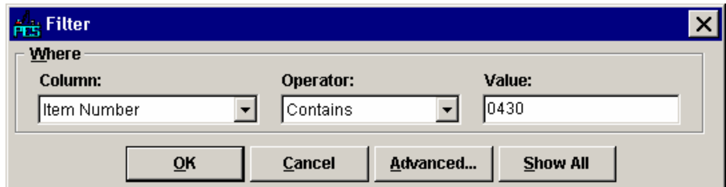
The Item Class Function field contains a code that categorizes the item into various groupings such as utilities, landscape, etc. This field is very useful in narrowing down the list of items to be viewed by use of a filter.

The Trns•port Filter

A filter provides the user with a means to limit the list of records appearing in a window. The Filter Function is available on most PES screens. It is especially helpful in limiting the item List. Use the filter to enter selection criteria on one or more fields applicable to the active window. For example, you may only want to see items in a particular Pay Item Year, or you may want to see Projects with a certain Control Group. The fields that are available to include in the selection criteria will depend on the active window.

PES and LAS are set up to support both upper and lower case characters. Fields that are populated from the Department mainframe will be in uppercase because the mainframe stores everything in uppercase. For instance, the Item Description is in uppercase, so when filtering on the Short Description field, look for all uppercase characters. All code values are stored in uppercase. When filtering on a code-based field, search for uppercase letters. Other fields, such as the second line of the Location field on the Project Header record, can have both upper and lower case letters in them. Be aware of the case of a field when performing a filter.

To set up a filter from the Tool Bar,



- Click the **Filter** button. 

The list box labeled Column will list all of the fields that are available for the search. The Operator list box contains the relationships that are available between the field that chosen in the Column list box and the entry in the Value box. The Value contains a literal that is being compared to the field in the Column box. In the example above, a simple filter on the field Item Number is looking for items that contain the string 0430.

For more complex filters, such as ones on multiple fields,

- Click the **Advanced** button.

The Advanced Filter feature allows filtering on more than one field and allows you to save the filter so that it can be used repeatedly.

The Name field contains the name of the filter and allows you to choose from a list of previously saved filters.

The Column, Operator, and Value fields operate the same as they did in the simple filter. The (+,)-, and And/Or columns allow parenthesis to create complex logic.

To add the first row:

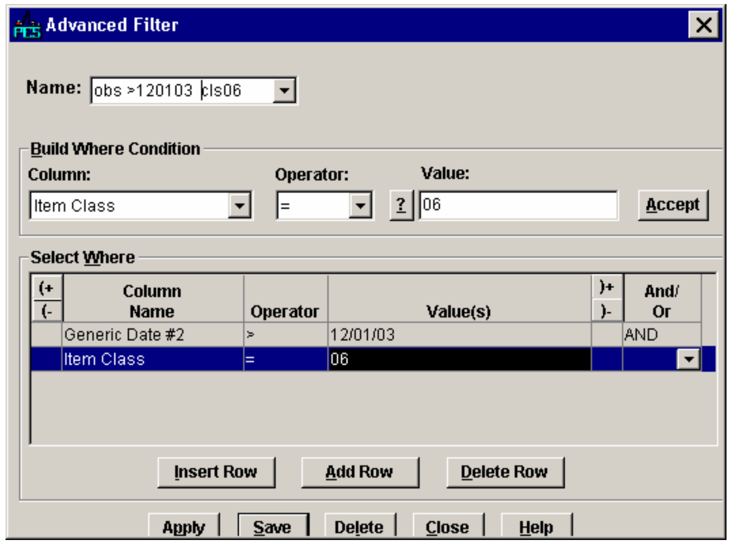
- Choose values for the **Column**, **Operator**, and **Value** fields at the top of the screen.
- Click the **Accept** button.

To add another row,

- Click the **Add Row** button,
- Click the row just added.
- Enter values in the **Column**, **Operator**, and **Values** fields.
- Click the **Accept** button.

In this example the filter is designed to show drainage items (Item Class 06) that will become obsolete after December 01, 2003.

- Add parenthesis as needed and choose either And or Or as appropriate.



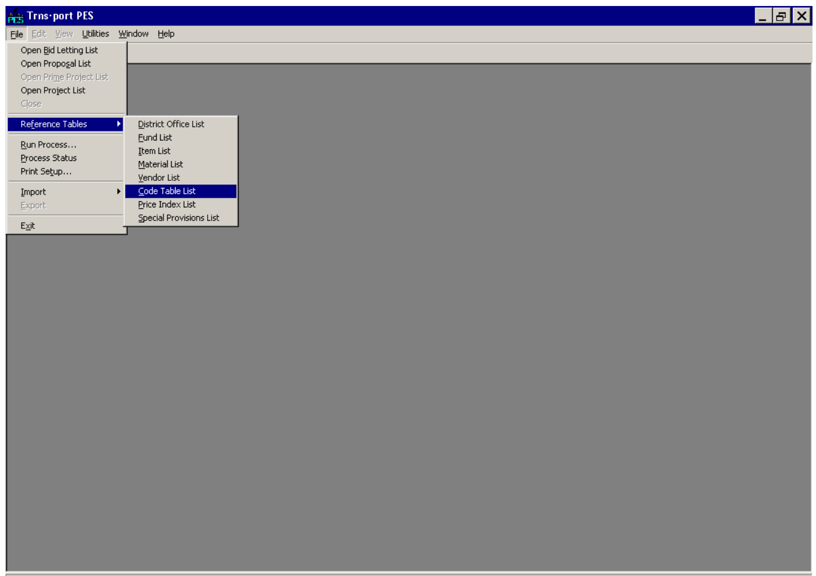
To save the filter,

- Enter a name in the **Name** field.
- Click the **Save** button.

The filter will be available for future use.

To apply the filter now,

- Click the **Apply** button.



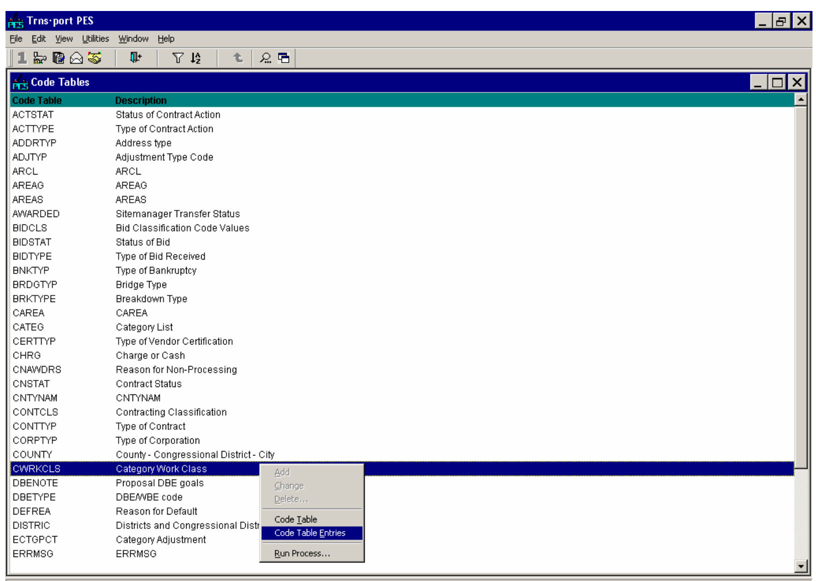
Code Tables

The Category Class Work field is an example of a field that is supported by a code table.

To view the Category Work Class code table, from the Menu Bar

- Click **File > Reference Tables > Code Table List**.

The Code Table List window showing all code tables for PES/LAS will open.

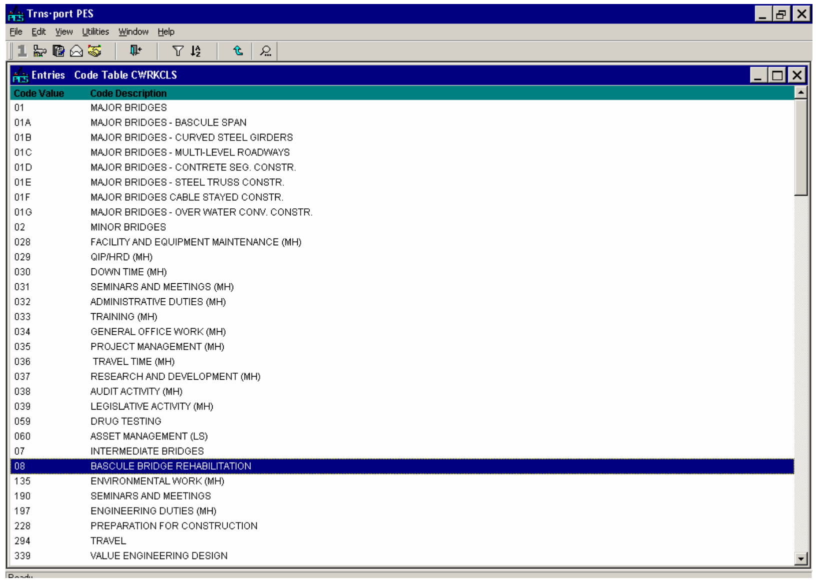


To see the codes for a particular code table,

- Click the table of interest then with the cursor on the blue band,
- Rclick to see the Mouse Button Menu.
- Click **Code Table Entries**.

This will show a list of all of the entries for that code table. The Office of Information Systems (OIS) or the Trns•port Coordinator will maintain reference tables and code tables.

Note that structure classifications are listed for this particular table. All structure categories (Category 01??) should be identified by the appropriate code in the Category Work Class field of the Category tab of the project.



PES Components

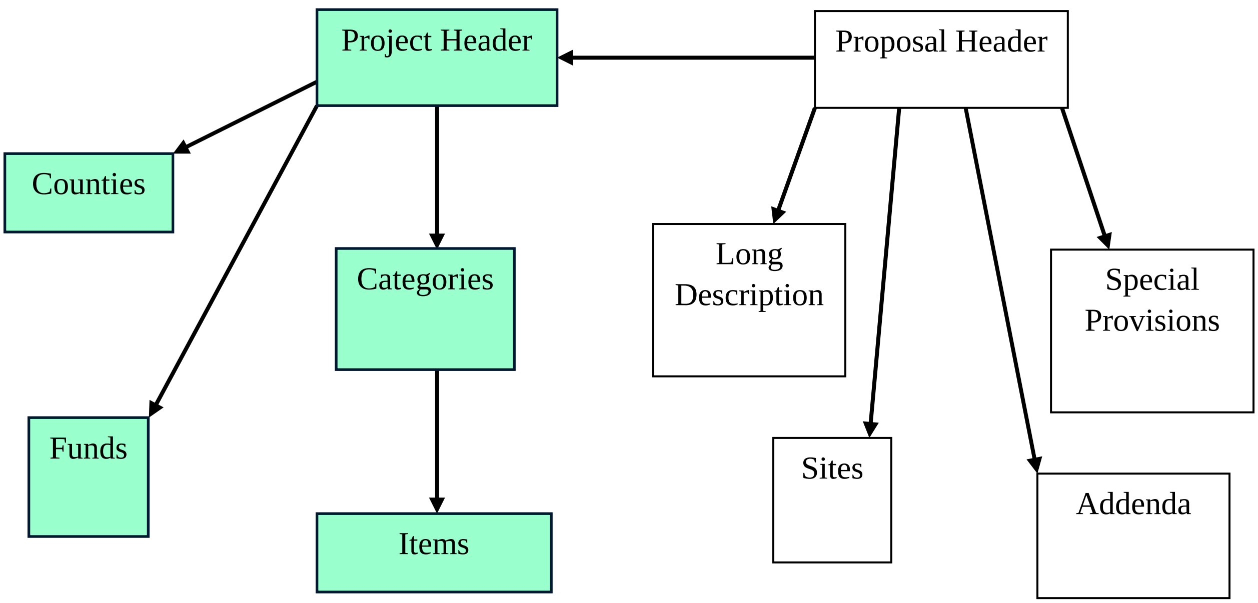


Figure 3

In PES there are two main components - Projects and Proposals. These two objects are referred to as “root level” objects. They can exist by themselves. All other data in PES, except for code and reference tables, belongs to either a project or a proposal. *Figure 3* shows some of these relationships.

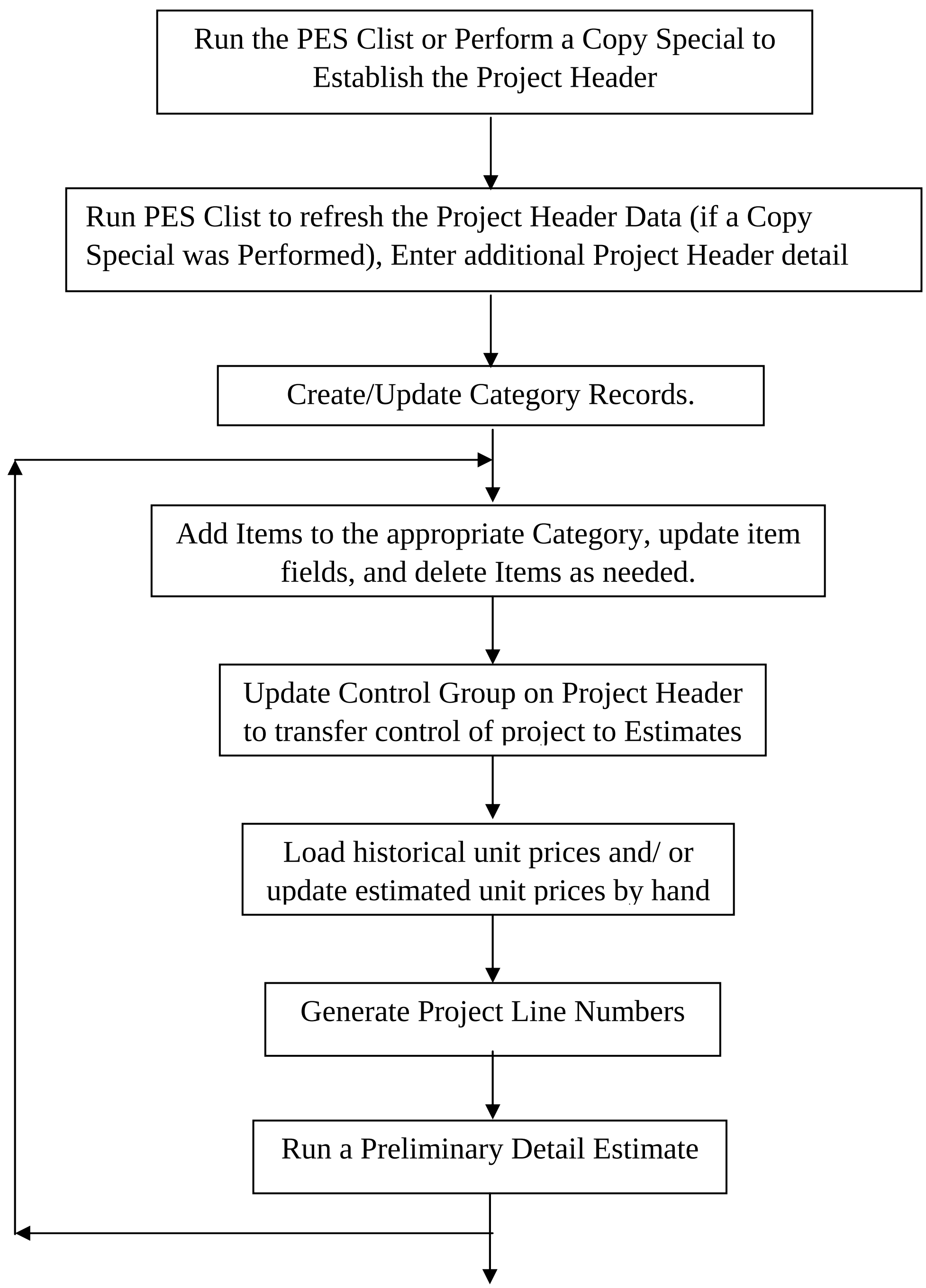
All work in PES begins with the creation of a project. As illustrated in *Figure 2* on page 6, a project is composed of a Project Header record; one or more Category records and each category can have one or more items belonging to it. *Figure 4* on the next two pages shows a typical project development life cycle in PES.

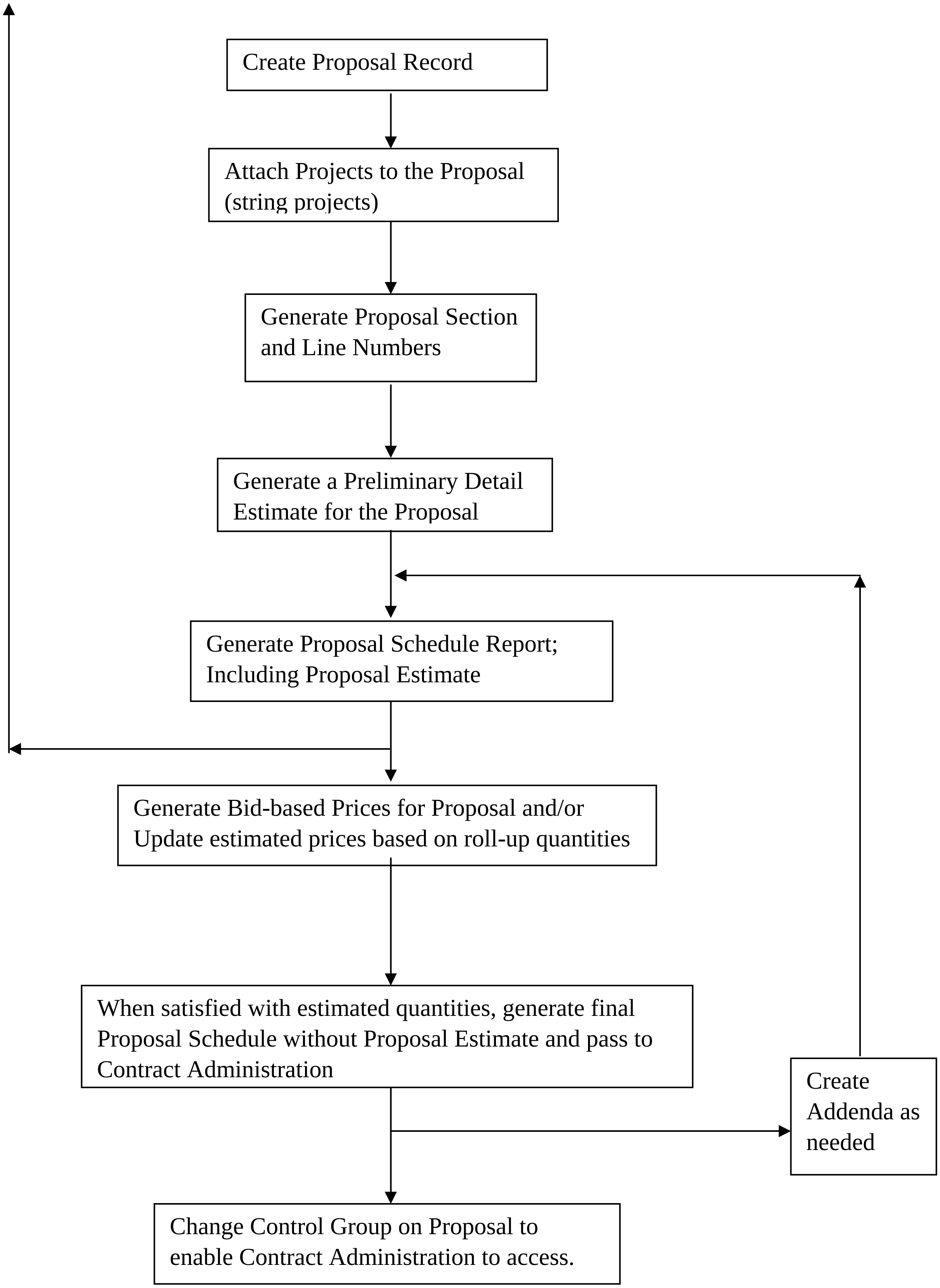
There are several ways for a project to be created in PES:

- A project can be loaded from the FM (Financial Management) system.
- A project header can be entered by hand.
- A project header can be created by copying from another project.
- A project header can be created by importing it from a source outside of PES.

Currently the Department does not have a procedure or standards in place for the loading of projects from outside sources.

Figure 4

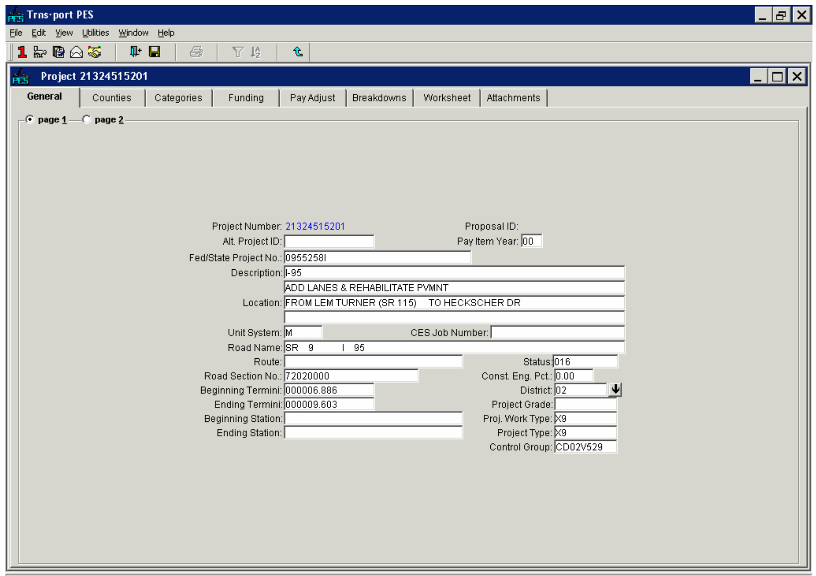



Create Proposal Record
Attach Projects to the Proposal (string projects)
Generate Proposal Section and Line Numbers
Generate a Preliminary Detail Estimate for the Proposal
Generate Proposal Schedule Report; Including Proposal Estimate
Generate Bid-based Prices for Proposal and/or Update estimated prices based on roll-up quantities
When satisfied with estimated quantities, generate final Proposal Schedule without Proposal Estimate and pass to Contract Administration
Create Addenda as needed
Change Control Group on Proposal to enable Contract Administration to access.

Maintaining Records in PES

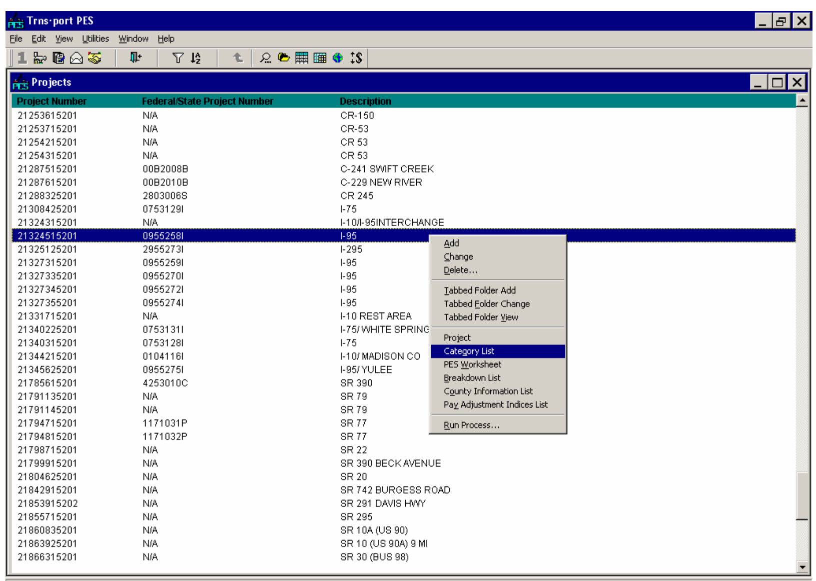
There are two methods of maintaining records in Trns•port. These are the tabbed folder method, and the drill-down method. The long-term plan of AASHTO is that the drill-down method will be phased out.

The Tabbed Folder Method



A tabbed folder presents many associated records broken out and grouped under various Tabs. Each tab represents a different type of record, but all of the records in the Folder relate to each other. For example in the Project Tabbed Folder, see the category records that belong to that particular project grouped under the Categories Tab. All of the item records that belong to those Categories are found under the Worksheet tab, etc. Using the Tabbed folder allows you to view and modify many records at once.

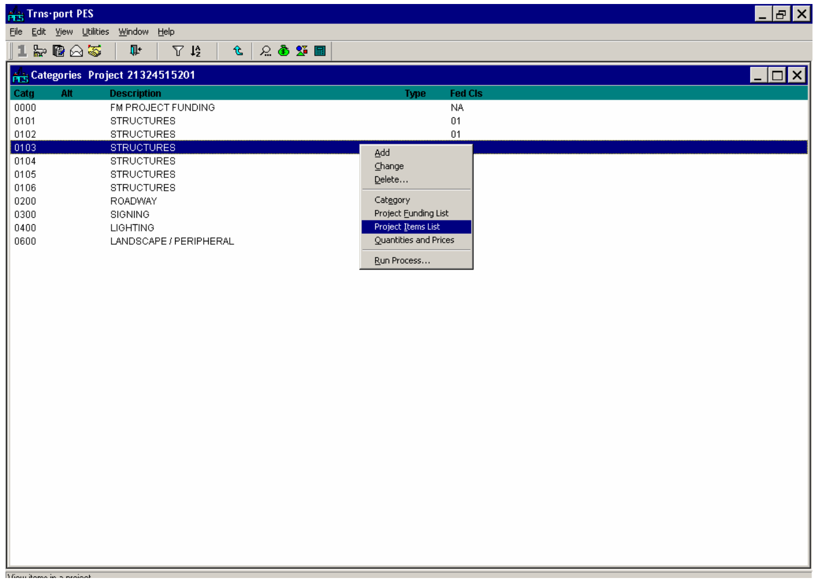
The Drill-Down Method



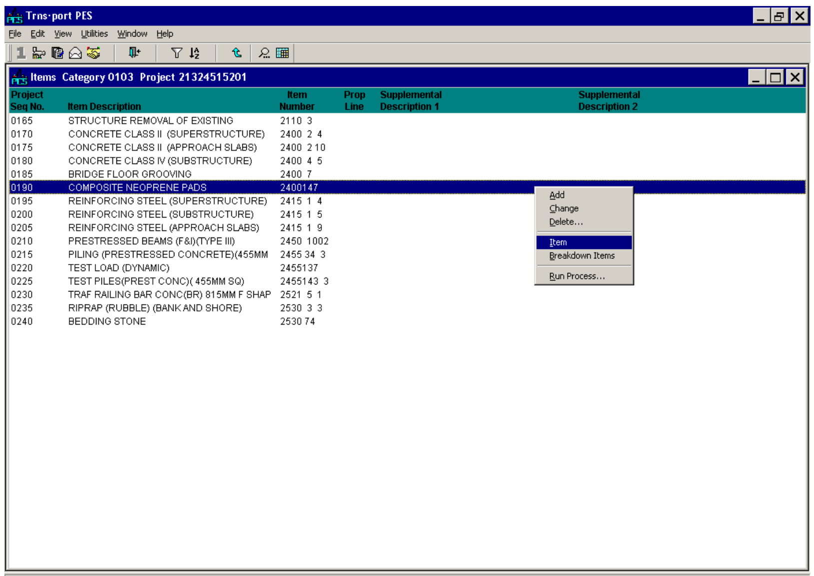
The second method of maintaining records in PES is the Drill-Down method. This method involves selecting one record at a time and then Rclicking on that record to "drill down" to the next level. For example, to get to a particular item on a Project using the Drill-Down method, first

- Highlight the **Project**,
- Rclick to see the Mouse Button Menu.
- Click **Category List**,

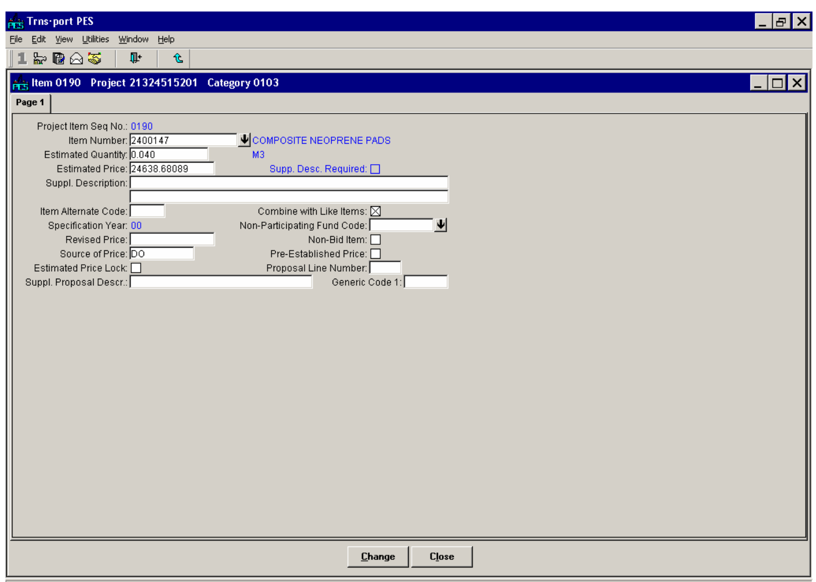
- Highlight a category.
- Rclick to see the Mouse Button Menu.
- Click **Item List**



- Highlight the Item of interest.
- Rclick to see the Mouse Button Menu.
- Click the **Item** desired.



- Click the **Change** Button to make changes
- Click the **Close** Button when complete.



Creating Projects

Adding projects into Trns•port PES should be thought of as involving two steps. The first is to create a project header, and the second is to add the project detail.

In general, projects can be brought into Trns•port PES in one of the following ways:

- Create a project header through an interface program.
- Enter a project manually through the either the **Add** or **Tabbed Folder Add** window from the right mouse button.
- Enter a project manually through either the **Edit > Add** or **Edit > Tabbed Folder Add** window from the Menu Bar.
- Copy detail from one project to another.

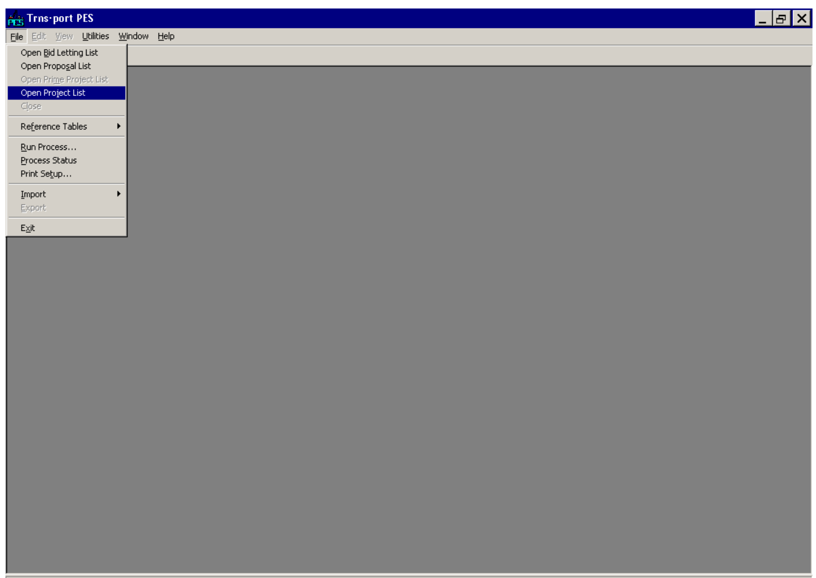
To create a new project, use the FM Interface to create the project header and then add project details into the new project, or enter a few fields of data to create a project header and then complete information from the FM Interface.

Project List window

To view the list of projects, from the Menu Bar

- Click **File > Open Project List**

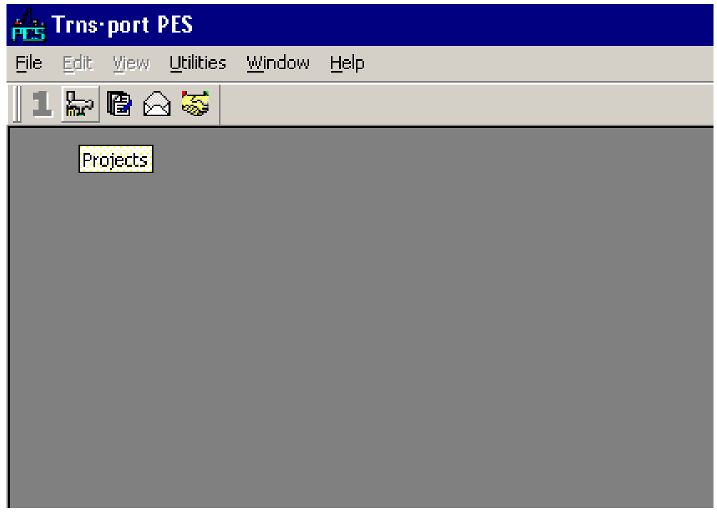
Remember that one of the fields on the project header is the ***Control Group***. FM populates this field. If you download a project that is not a part of the control group, you will not be able to see it on the project list.



Another method of invoking the Project List window is to

- Click the **Project** button on the Tool Bar. 

When the mouse is over a button on the Tool Bar, an information box will appear that will identify the button by name.



These methods also apply to viewing other List Windows in Trns•port. There are four main List Windows in Trns•port that the Department uses. These are

- Projects,
- Proposals,
- Lettings,
- Vendors.

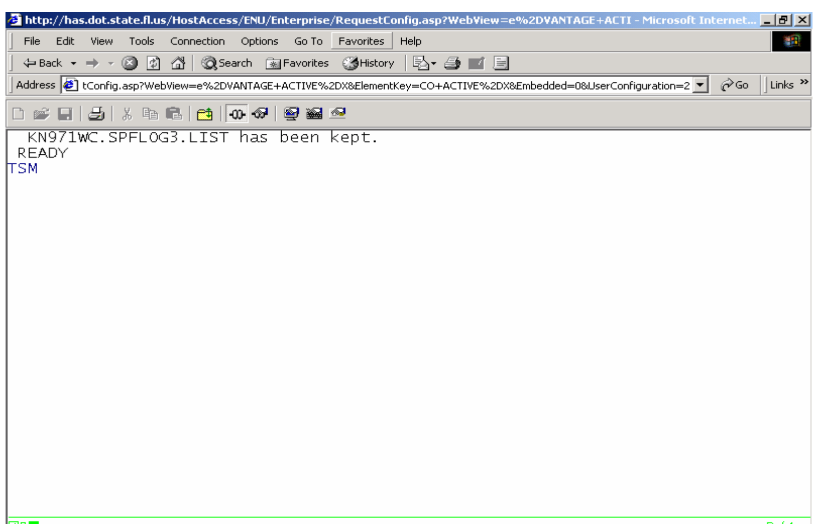
The Department is not using the Prime Project function.

The FM Interface

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.

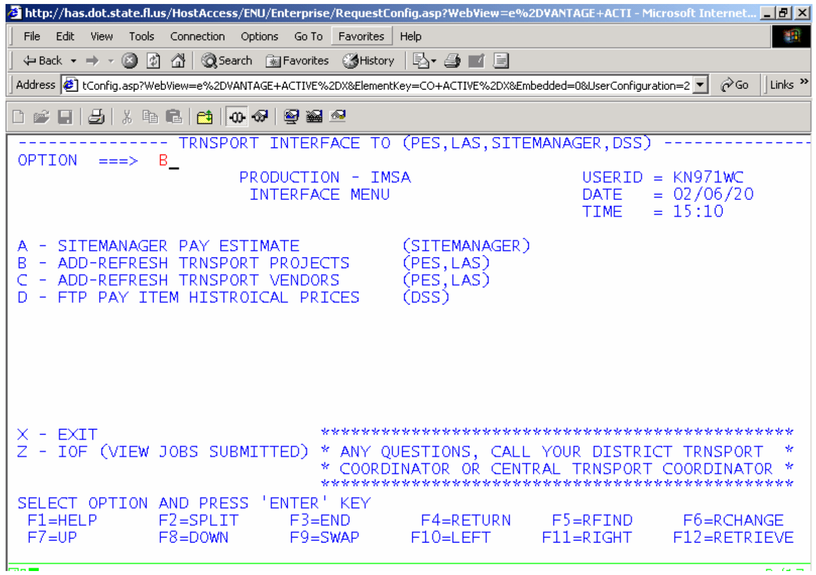
To execute the FM Interface on the mainframe,

- Enter **TSO**,
- Get to a **READY** prompt
- Type **TSM** and
- Press **<Enter>**.



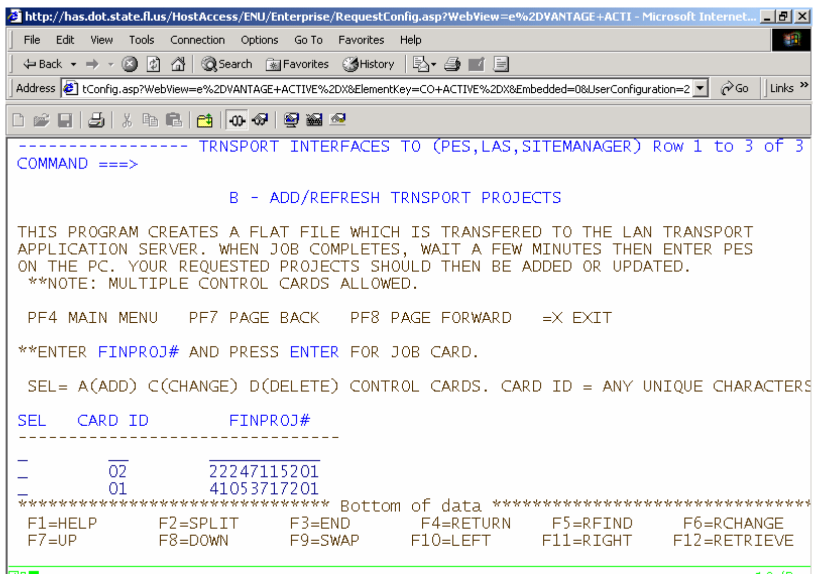
At the Trns•port Interface screen,

- Enter **B** to either add a project, or refresh a project,
- Press **<Enter>.**



At the Add/Refresh Transport Projects screen, enter as many financial projects as needed.

- 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>.**

If you make an error in the length, an error message will be displayed. However, there is no validation of the accuracy or existence of the FinProj number in the FM system as data is entered.

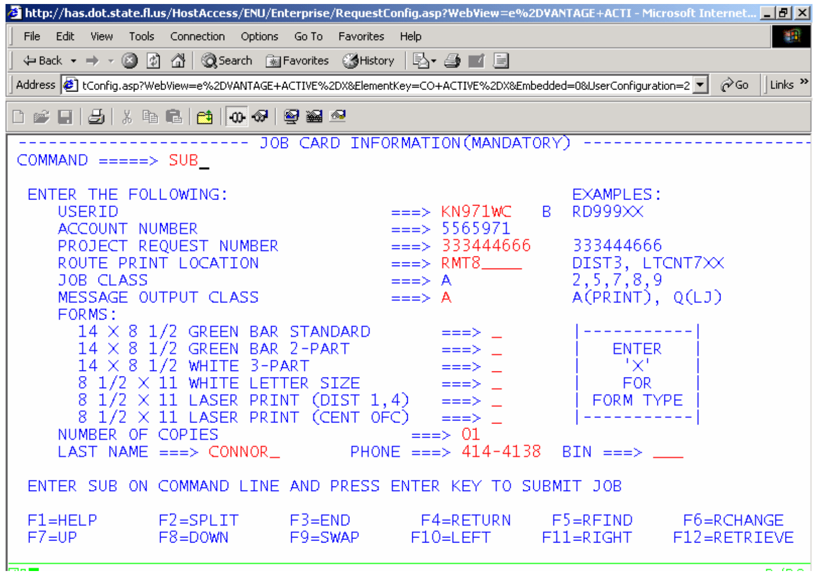
When you have completed entering projects,

- Press <**Enter**> again without entering any data on the row.

At the Job Card Information Screen, you will be prompted to enter a printer ID, a name, and phone number. When that is complete,

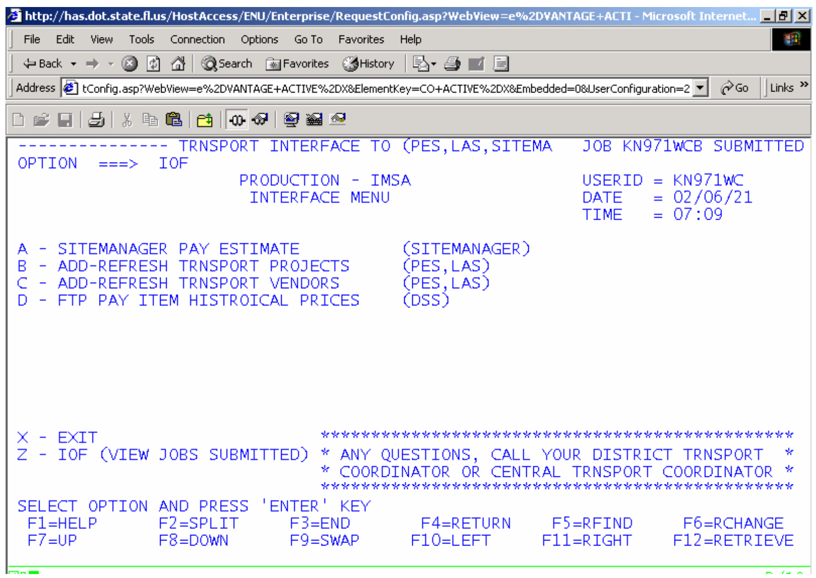
- Type **SUB** on the command line and
- Press **<Enter>.**

A batch job is submitted that will load the selected projects into PES. The job name and number appear on the screen to the left.

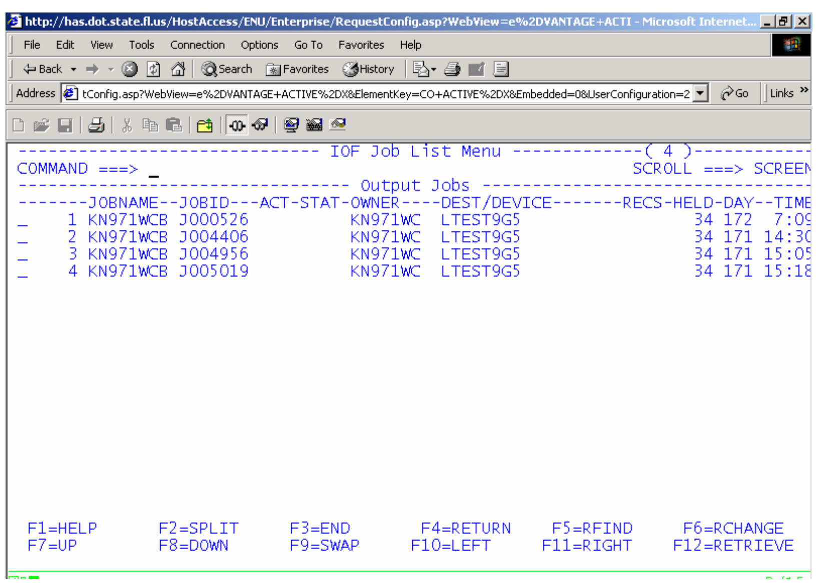


Check on the progress of the job in IOF. The job output will be put into the IOF queue.

In IOF, view the output of the job to see if it processed successfully. Determine the sequential number of the job. Then enter that number on the command line. This shows a list of output sections.



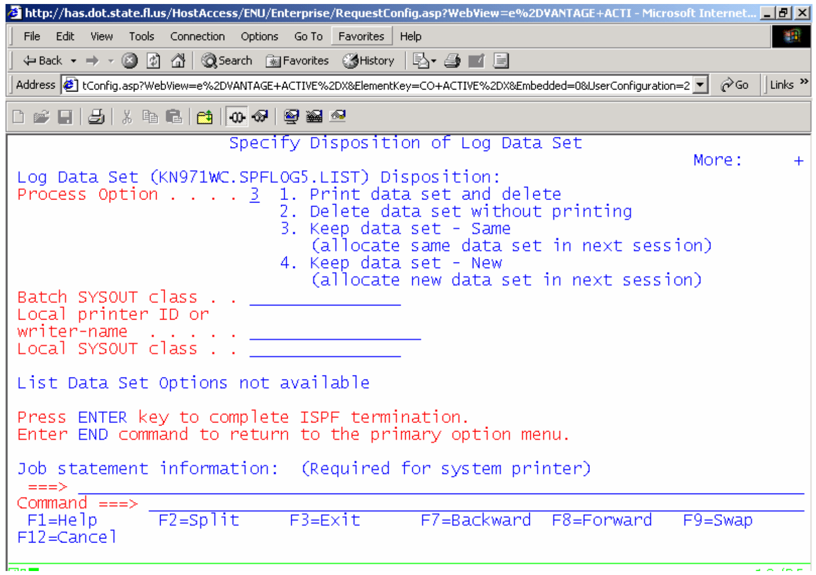
Look for the one that is labeled REPORT and select it by putting an S next to it, or by entering the sequential number of the REPORT output. You may have to press the F8 key to page down to see the REPORT output.



If nothing appears in the REPORT output, look at the output labeled ERRORRPT. For example if the FinProj entered does not belong to your district, this message in the output labeled ERRORRPT.

At the Disposition of Log Data Set screen

- Choose a process
- Press **<Enter>**.
- To exit press **F3**

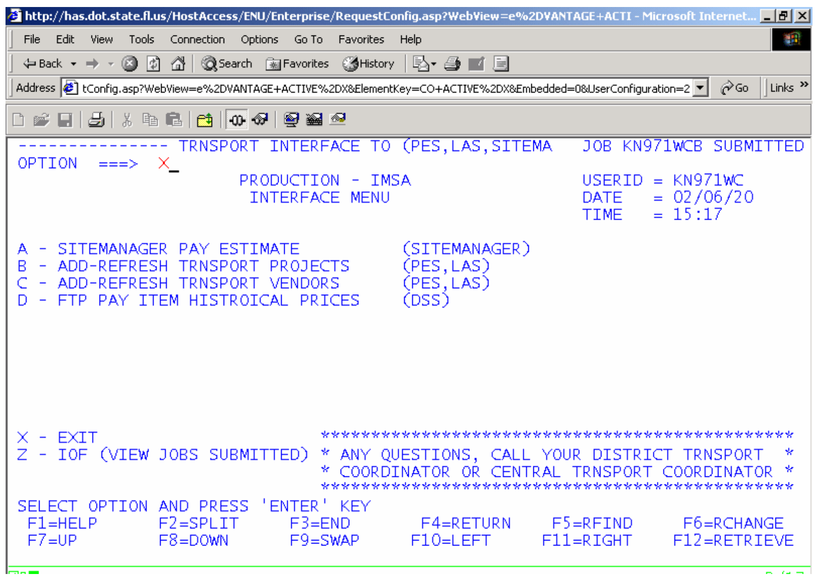


To exit the FM Interface

- Type an **X** at the command prompt
- Press **<Enter>.**

A TSO screen will reappear with a ready prompt.

- To exit, type **logoff**
- Press **<Enter>.**



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.) These new projects will contain an Access Control Group that is accessible to your district.

Creating a Project from Scratch

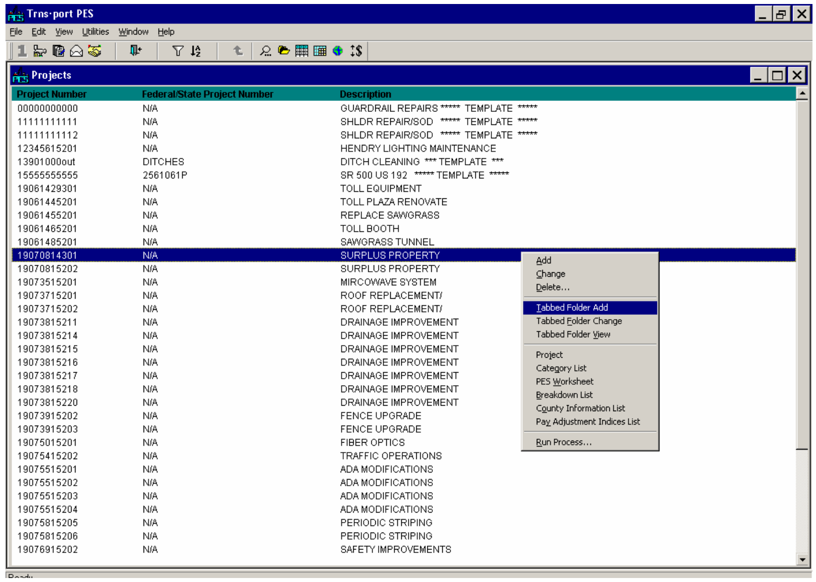
If you are creating a "real" project from scratch, use a proper FinProj number. Leave the FM supplied fields blank and then run the FM Interface to refresh these fields later. Enter the procedurally required fields for the Project Header.

To add a project header manually,

- Rclick to see the Mouse Button Menu from anywhere in the Project List window.
- Click **Tabbed Folder Add**.

Or,

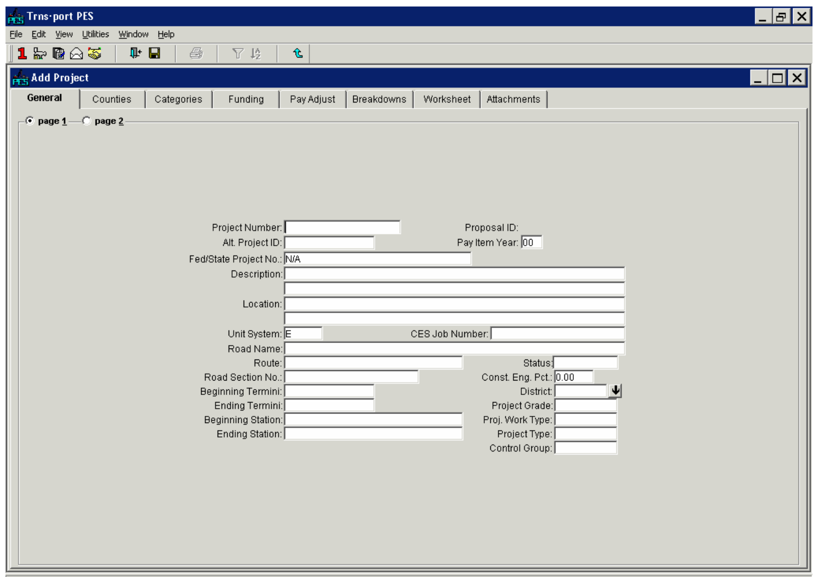
- From the Menu Bar, Click **Edit** > **Tabbed Folder Add**.



This will display an empty Project Tabbed Folder. Enter the Project Header information first and then proceed to the other tabs.

Most fields are blank, but some are defaulted to particular values, such as the ***Unit System*** field (default is English). Most field defaults may be changed as appropriate.

Proceed to enter data in page 1 of the general tab for the following fields:



Project Number Enter the Financial Project (FINPROJ) Number.

Pay Item Year A default value of 00 has been set.

Fed/State Project No. A default of N/A is assigned. For Federal Aid projects enter the appropriate number.

Description Enter the project description. It will be updated from the FM system.

Unit System The default value is “E” for English. Change it if necessary.

Const. Eng. Pct The default value is 0.00. **Do not change it**.

District Enter the managing district for the project, by clicking on the list box and selecting the district.

Project Work Type Select from the List box.

Project Type Select from the List box.

Control Group Assign a control group to the project that matches the personal control group, except that no wild cards ("*" or "?") may be used in the Project Control Group. See Appendix A for a discussion of the Control Group structure.

Other fields may be left at their default values.

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

****** IMPORTANT ****When adding a project from scratch remember to enter the control group, otherwise the project will become "lost"**

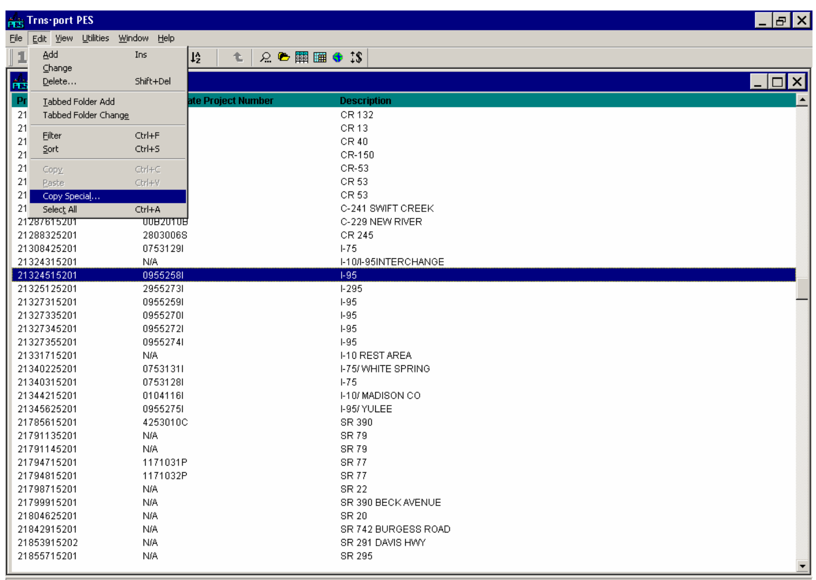
Creating a Project Using Copy Special

Copy Special is a function that provides a quick way of creating Projects or Categories. It takes an existing Project or Category and creates a new Project or Category by copying ALL of the records associated with the existing Project or Category. The new Project or Category can then be edited to make the appropriate changes.

This method will not only create the Project Header, but will also copy all of the other records associated with the source project. All of the records in the Tabbed Folder of the original project will be copied to the new project.

To initiate a Copy Special for a project,

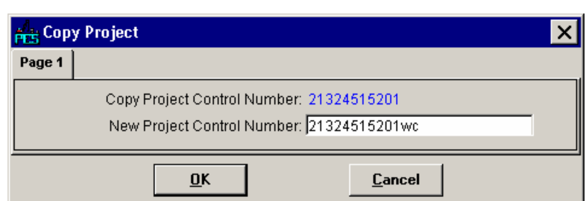
- Click the source project from the Project List window.
- Click **Edit > Copy Special** from the Menu Bar.



This will open a window that asks what project to create using the copy. The project you are copying to cannot already exist.

To perform the copy,

- Enter the new ***Project Control Number***
- Click OK. The new project will be created.



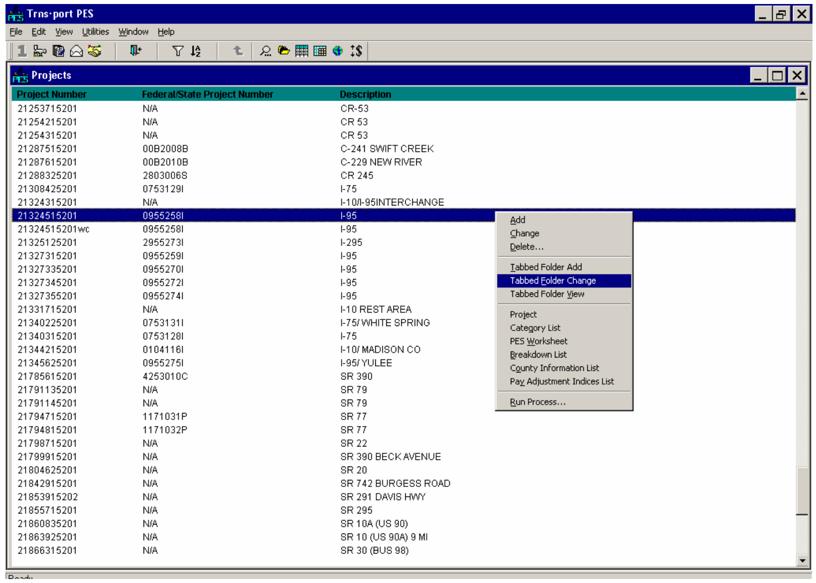
The new Project Control Number should be a valid FinProj Number, unless the project being created is a template or temporary project.

Project Data

Updating Project Headers

To update an existing Project Header record,

- Rclick on the project to open the Mouse Button Menu.
- Click **Tabbed Folder Change.**



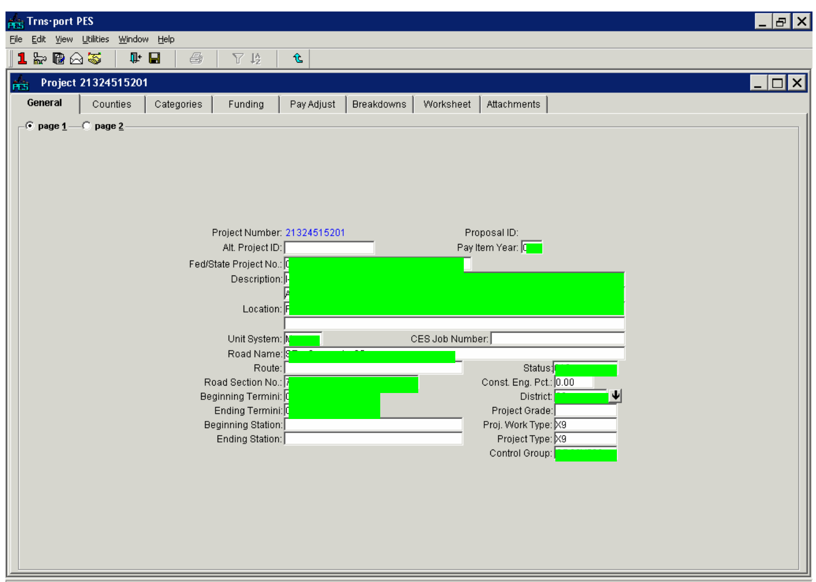
The General tab

The General tab contains two pages of Project Header information.

The fields that are highlighted are the ones that are populated from FM.

Project Number	***Pay Item Year***	***Fed/State Project No.***
Description	***Location***	***Unit System***
Road Number	***Status***	***Road Section Number***
Beginning Termini	***District***	***Ending Termini***
Control Group		

These fields (except for ***Control Group***) should NEVER be updated directly in Trns•port because the nightly FM refresh process will over write them. These fields can be refreshed on demand by running the FM Interface.

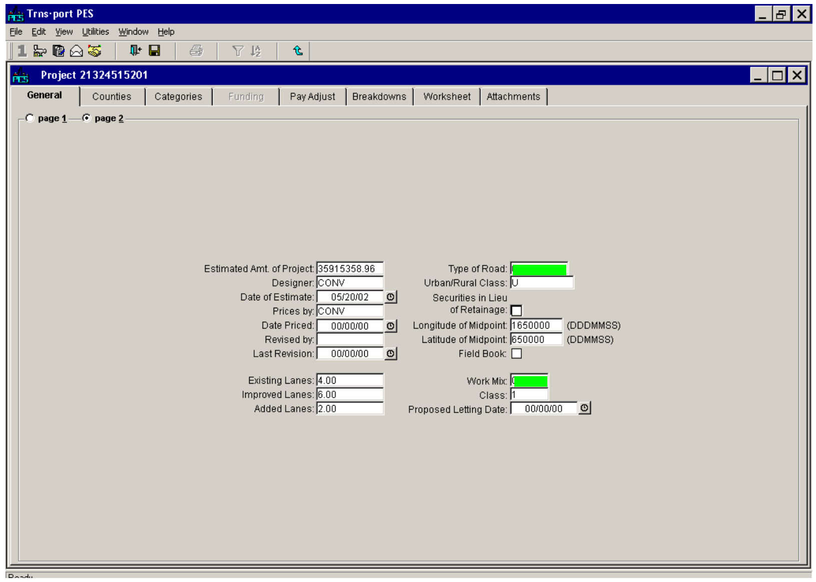


The ***Pay Item Year*** will default to 00. The Pay Item Year will not be reset when the refresh runs.

If there is incorrect or incomplete information in any of the FM fields, contact the FM Administrator to have the fields updated in FM.

To view page 2 of the Project Header information,

- Click the page 2-radio button.



❖ ***Estimated Amt of Project*** This required field is filled when you run the process **Generate Preliminary Detailed Estimate.** This process will be run several times over the project development 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**.

The ***Type of Road*** and ***Work Mix*** fields on page 2 come from FM.

To update fields other than those populated by FM, on any screen

- Type over the field.

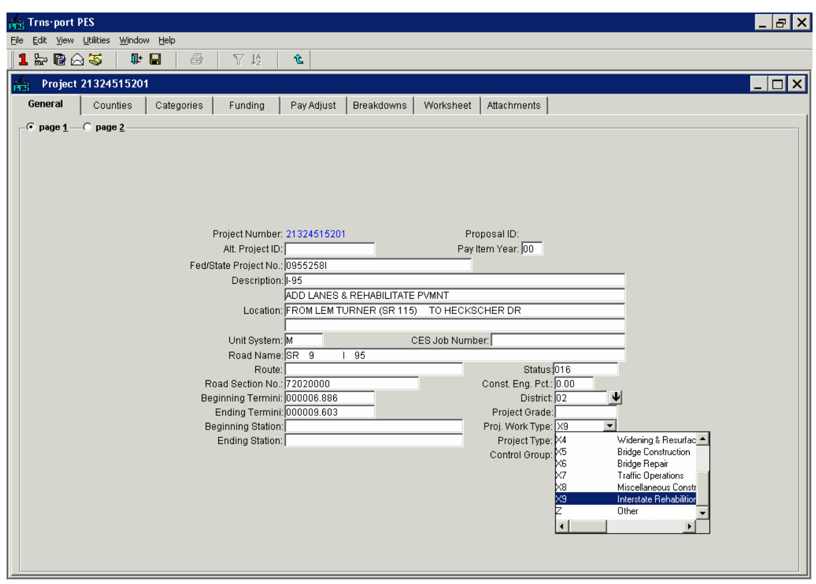
If a code table supports the field,

- Click in the field.
- Click the down arrow that appears.

A list box of selections will appear.

- Choose the desired value from the list box by clicking on it.

If you type something incorrectly and wish to restore the original value, press **<Esc>** while you are still in the field. This does not work if you selected a value for a field by choosing it from a list box. If you need to recover the change and have gone beyond the particular field, close the project and NOT SAVE it when the prompt comes. If you do this, you lose all changes made in the current session.

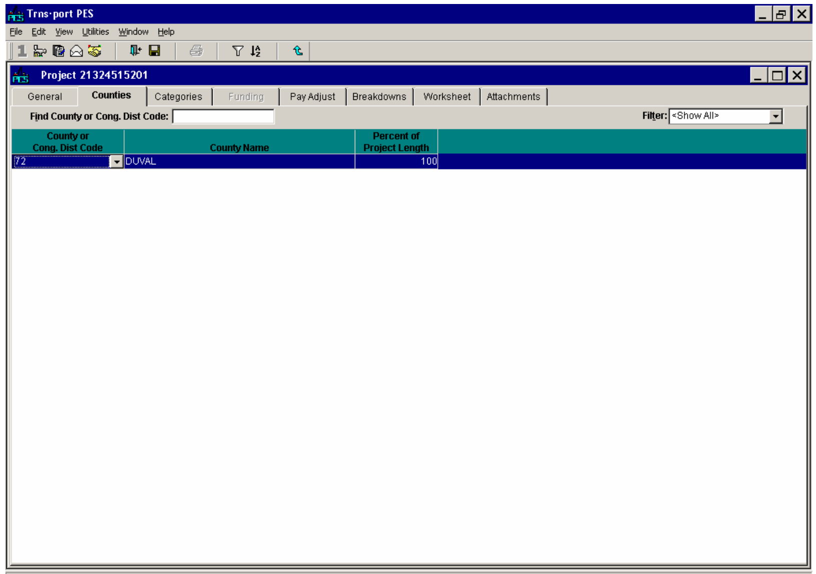


This is an example of a list box of valid codes appearing for the field ***Project Work Type***.

The Counties Tab

To view the Counties,

- Click the **Counties** Tab.



The county record indicates the percentage of the project in each county.

The FM Interface will provide the county records and their percentages.

If you create a project from scratch, add county information or leave this tab blank and run the FM Interface to refresh the project.

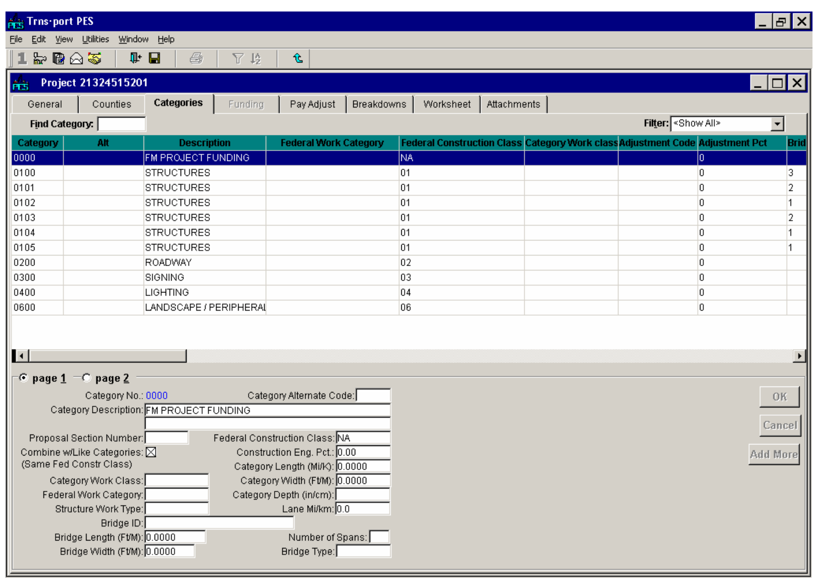
If you add a county that does not exist for the project in FM, the refresh process will not delete it, however, it will set the Percent of Project Length to zero. If the county information is incorrect or incomplete contact the Work Program Administrator and have them correct the county information.

To add or delete a County record,

- Rclick to open the Mouse Button Menu.
- Click **Add** or **Delete** as appropriate.

Remember that information in the County tab is refreshed from Work Program. If corrections need to be made, make them through the Work Program office.

The Categories tab



A Category is a record that belongs to a Project. It is a way of grouping related items together. The tab contains a list of all categories included on the project. This project has eleven categories including Category 0000 for funding.

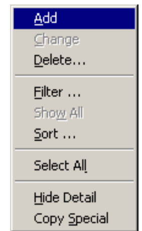
A full set of category numbers and titles is provided for use in adding pay item detail with the initial run of the FM interface.

When a project will have more

than one bridge, add categories, so that the number of structures categories is equal to the number of bridges in the project. The first bridge in a project is assigned to category 0100. Additional bridges are assigned to category 0101, 0102, 0103, etc. It is particularly important that the category fields for all structures categories be filled as completely as possible. The detail on the category tabs is the source for creating reports to the Federal Highway Administration.

Adding a Category

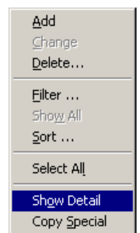
To add a category record



- Rclick anywhere in the top half of the Category tab screen to open the Mouse Button Menu.
- Click **Add**.

This will open an input window at the bottom of the screen.

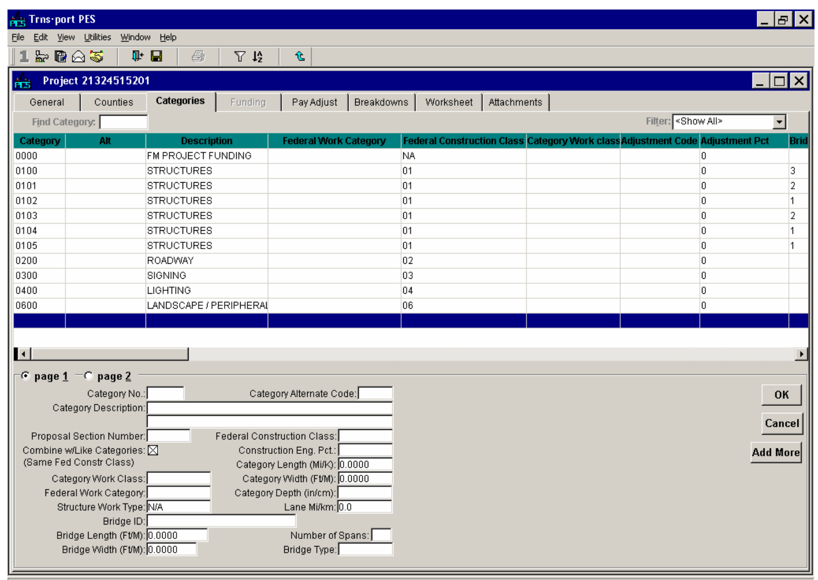
Or



- Click **Edit** > **Add** from the Menu Bar.

If there are not two sections of the screen showing,

- Rclick in the screen to see the Mouse Button Menu.
- Click **Show Detail**.



You should then see both an upper and lower section of the screen.

A new blank line appears in the top half of the screen.

The Category No. field is the unique key to the Category record and therefore each value must be unique to a particular project.

- Enter the ***Category Number***.

Choose from the following list. These categories align with the Department's standard Design Groups:

0000 FM PROJECT FUNDING (Required)	0100 STRUCTURES
0200 ROADWAY	0300 SIGNING
0400 LIGHTING	0500 SIGNALIZATION
0600 LANDSCAPE/PERIPHERAL	0700 ARCHITECTURE
0800 UTILITIES	0900 MASS TRANSIT

Categories Tab page 1

- Complete the following fields for each category:

  Category Description Enter the description from the above list.

  Proposal Section Number Leave this blank. It will be automatically generated later.

  Federal Construction Class Choose the Design Group from the drop down window. This value is from the FEDCCLS code table.

  Combine w/Like Categories The default value for this flag is YES.

  Construction Eng. Pct Not in use. A default value of 0.00 will appear.

  Category Length Assign the full length of the project in the Roadway Category, or divide the length between bridges and roadway, so that the combined length is equal to the overall project length. Enter miles or kilometers.

  Category work Class For structures it is very important to fill this field. Choose the drop down menu the appropriate classification for the structure. This field is used to classify work for pre-qualifying bidders.

  Structure Work Type Similar to the Federal Work Category, except that the FEDSUPP Code Table is used.

  Category Width The width of this portion of the project in feet or meters.

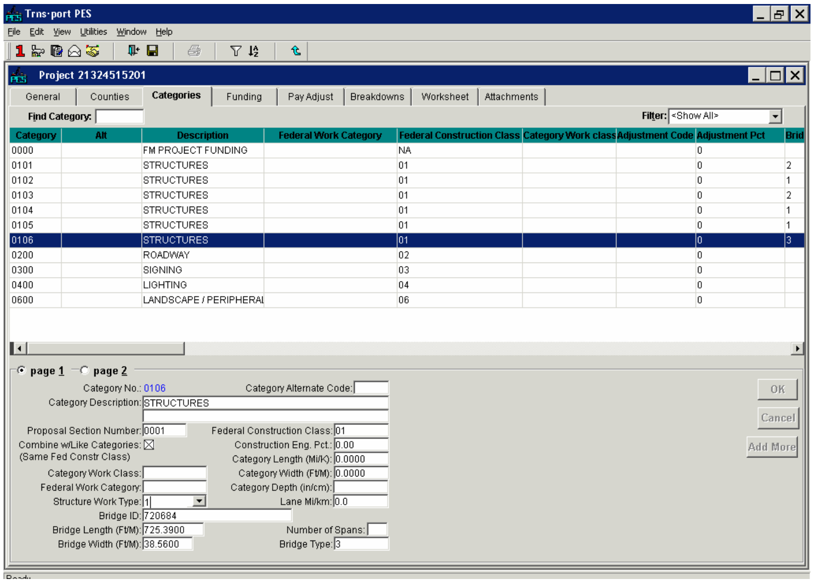
  Bridge ID The Bridge Number.

  Bridge Length (Ft/M) The length of the bridge in feet or meters.

  Bridge Width (Ft/M) The width of the bridge in feet or meters.

  Bridge Type A value selected from the attached BRDGTYP code table that indicates the type of bridge (e.g., Overpass, Trestle Low, etc.).

  Number of Spans The number of spans of the structure represented by a category.



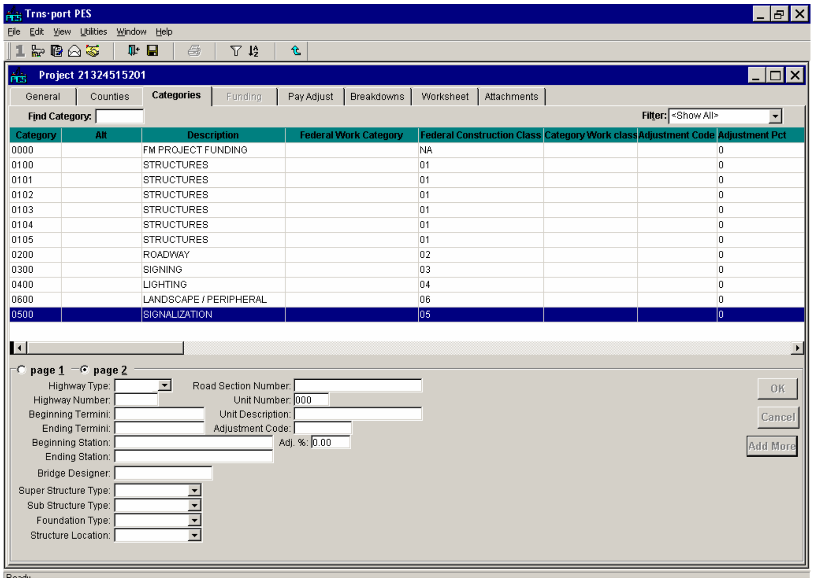
Categories Tab page 2

When information on page 1 is complete,

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

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

Required Fields for Category Page 2



Beginning and Ending Termini – FM supplies these. Verify their accuracy.

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

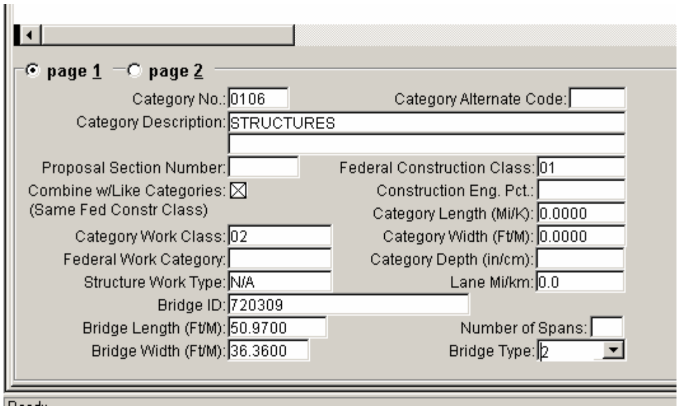
- Click **OK** in the gray area to accept the row of data.

To enter another category,

- Click **ADD MORE** and continue.
- Click **OK** when complete.
- Click **CANCEL** to return to the Categories List window without saving the new record.

The Combine with Like Category Flag

(See also Combine with Like Items)



The Combine with Like Categories field and the Combine with Like Items field on the Item Record control the presentation of items for bidding in the proposal. When both of these fields are marked Yes (or checked) then items from categories which have the same Federal Construction Class and the same Category Alternate Code will have their quantities combined and only be presented once on the proposal for bidding.

For example, if there are two separate categories each of which contained the tem 2515 1 5 PIPE HANDRAIL and the Combine Flags were both set to **Y**, then the quantities for these items would be combined and the item would appear only once on the proposal. If the Combine with Like Category Flag is set to **N** then this will override the settings on the Combine with Like Items flags and the items for that category would not be combined on the proposal. If the **Combine With Like Category** flag is set to **Y** then individual items can be excluded from rolling up by setting their flags to **N**.

Like Category	Like item	Result
Y	Y	Quantities Combined
N	Y	Quantities Not Combined
Y	N	Quantities except for particular item combined

Creating a Category Using Copy Special

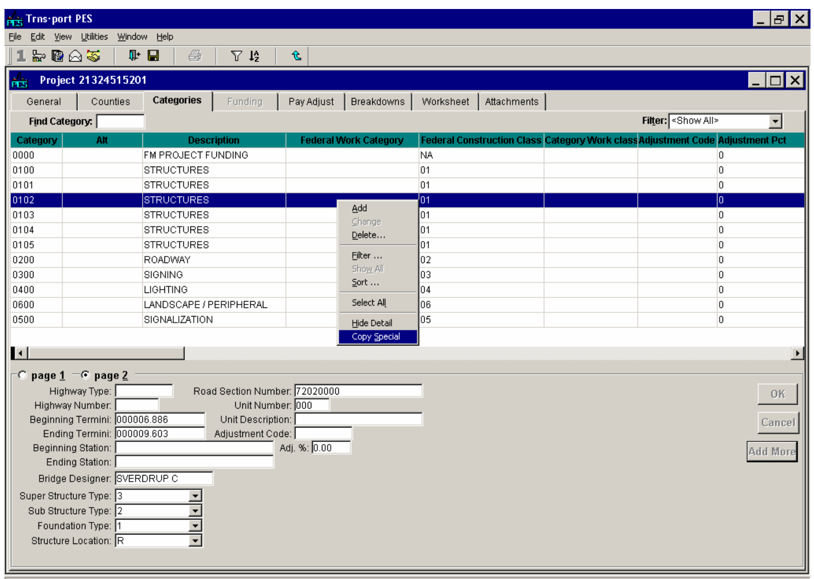
There is a Copy Special feature for a category similar to the Copy Special for a project. The difference is that only the particular category and its associated records (Item detail) will be copied and not the entire project. Because of this, the **project** that you are copying to **must already exist** but the **category** you are copying to **must not exist**.

This function can be used to create the Category records for a new project. Copy them from a template job that has all of the categories in it or copy individual categories from existing jobs that are similar to the one being created. This saves a lot of typing by eliminating the need to add items by hand. Once the Category is copied, add or delete items and update the quantities as appropriate.

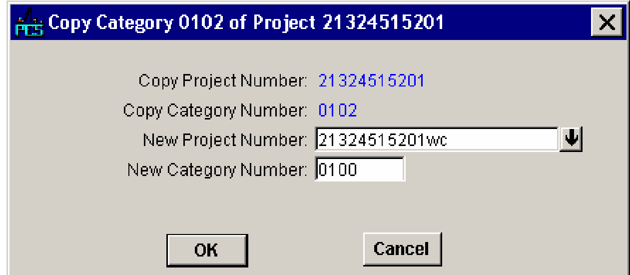
To initiate the Copy Special for a category, from within the Category Tab of the project,

- Highlight the category number to be copied.
- From the Mouse Button Menu, Click **Copy Special**

  Or
- From the Menu Bar, Click **Edit > Copy Special.**



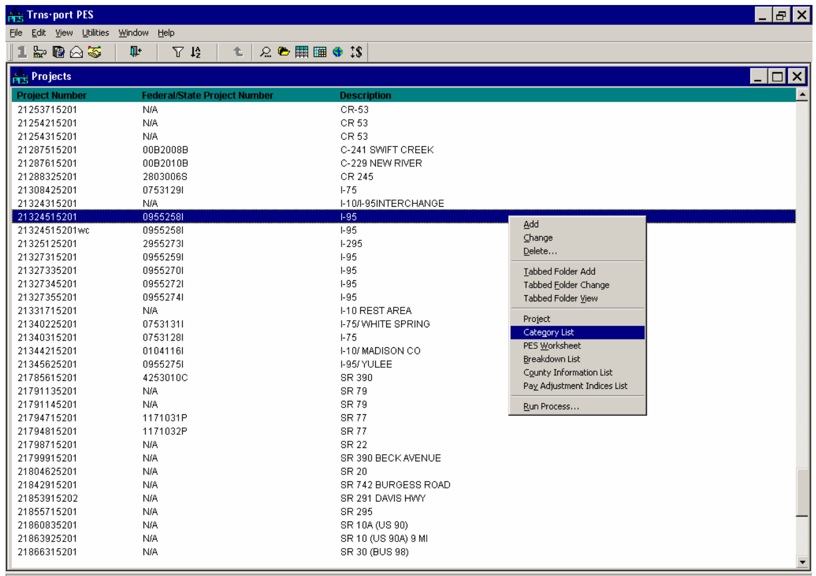
A screen will ask for a destination Financial Project Number and a destination Category Number. The duplicate category may be created in the Project that is open, or it may be created in another Project.



- Enter a **Project Number**.
- Enter a **Category Number**.
- Click **OK** when you are finished.

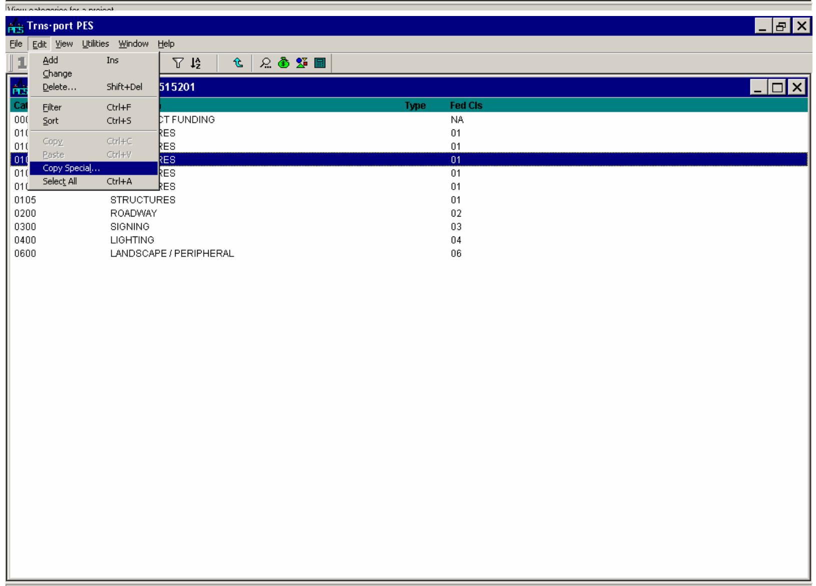
Alternatively, copy a category by drilling down to the source project from the Project List Window.

- Rclick the project in the Project List window to see the Mouse Button Menu.
- Click **Category List**.

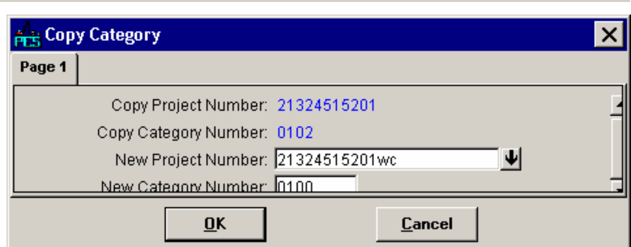


Then,

- Click the **Category** to copy
- From the Menu Bar Click **Edit > Copy Special**.



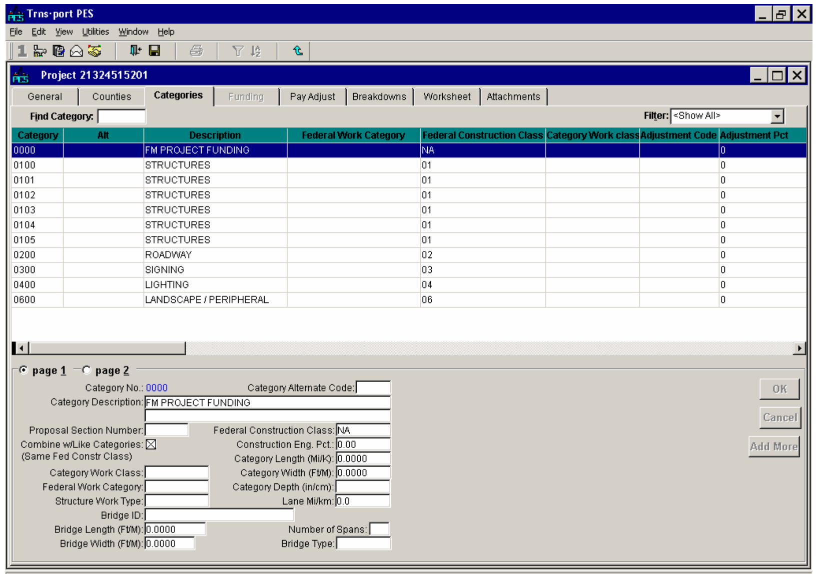
A screen will ask for a destination Financial Project Number and a destination Category Number. You may create the duplicate category in the Project that is open, or you may create it in another Project. While this screen is not identical to the one shown earlier it displays the same information.



- Enter a **Project Number**.
- Enter a **Category Number**.
- Click **OK** when you are finished.

The Category 0000 Record

There is one special category record that is created by the FM Interface. This is the Category 0000 record. It contains all of the funding information for the project. Trns•port permits funding for each category; however, The Department has elected to store the entire project funding under the 0000 Category. The funding information will not be updateable in Trns•port and **Category 0000 should never be deleted**.



If any funding information is in error, contact the Work Program staff to have it corrected. Here is an example of the Funding Information that came from FM. Note that the only category number seen is Category 0000. You will not be allowed to update, add, or delete any funding information.

Updating Category Records

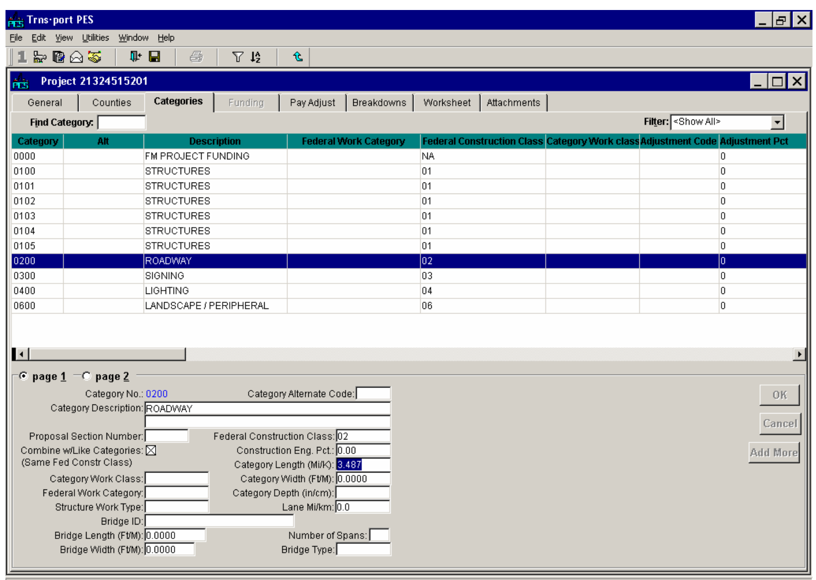
From the Projects List window,

- Rclick to see the Mouse Button Menu. .
- Click **Tabbed Folder Change.**
- Click the **Categories** tab.

To update a category record,

- Highlight the **Category**.

This will make the category detail available at the bottom of the screen.



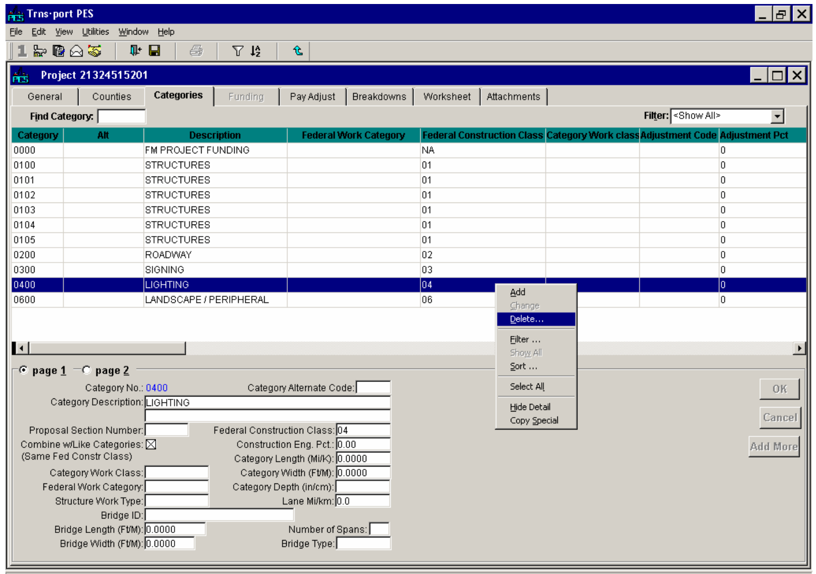
- Enter the desired information in the fields at the bottom.
- Click the **OK** button when complete.

To update the information on Page 2, click the page 2 Radio button and change the data in a similar manner.

The scroll bar at the right in the bottom half of the screen allows you to see additional fields for that particular category. The scroll bar on the right hand side of the upper half of the screen allows you to scroll up and down through the category records.

Deleting a Category Record

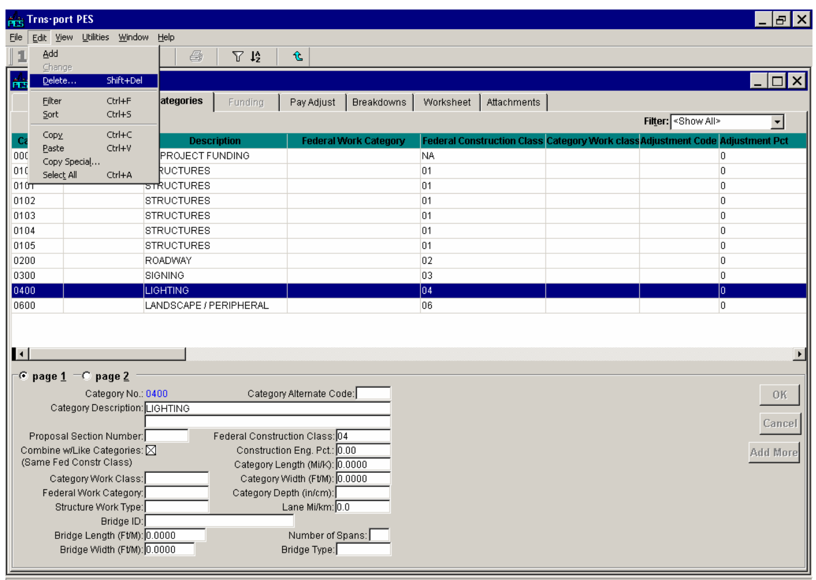
There are two ways to delete a category record.



To delete a category record from the **Category** Tab in the Project Tabbed Folder,

- Rclick the record.
- Click the **Delete** option on the Mouse Button Menu.

Or

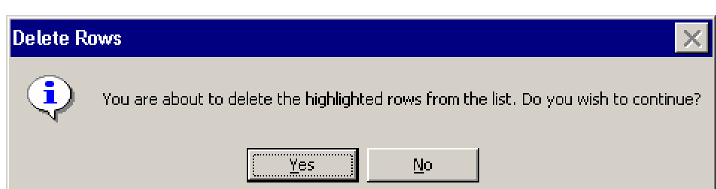


- From the Menu Bar Click **Edit** > **Delete**.
- Click the record to be deleted.

You will be prompted with a window that asks to confirm the delete.

To continue with the delete,

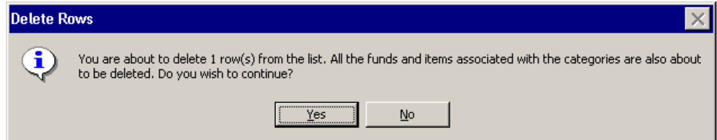
- Click the **Yes** button, otherwise Click the **No** button.



If you press the **Yes** button you will again be prompted with a window telling you how many records will be deleted and what other dependant records will be deleted.

When you delete a category, you will also delete any fund records and any item records that belong to that category. Again, if you do not want to continue with the delete, press the **No** button.

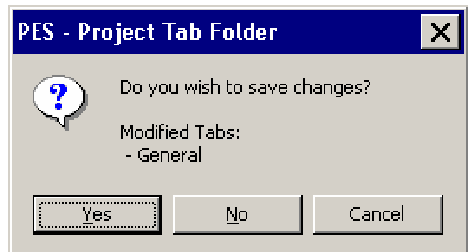
- Click the **Yes** to delete the category record and all of its associated records.



These same methods of **Rclick** to use mouse button menus or selecting the option from the **Edit** selection on the Menu Bar are available for most other entities such as Projects, Proposals, Items, etc. You may also select functions such as **Add** in the same manner.

Saving Data in Tabbed Folders

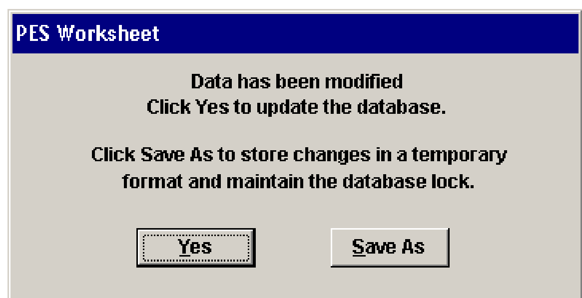
To save the changes in the Tabbed Folders, click the **X** at the upper right hand corner of the Tabbed Folder window. You will be notified as to which tabs had changes recorded for them and you will be prompted to confirm the save.



If you choose **No** then, you will exit the Tabbed Folder window without saving anything, but also without changing anything.

If you choose **Cancel,** no changes will be posted to the database and you will be returned to the Tab that was active when you clicked the **X**.

Choosing **Yes** above will give you this window. If you click the **Yes** button, the data will be validated and then the changes will be made to the database.



Do NOT click the Save As button. This option creates a temporary file on the PCs hard drive. It also locks the project that you were working on so that no other users can access it. This is very dangerous because if the PC has a failure, the project will be unavailable until the Trns•port Coordinator or an OIS person can clear the lock on it. In addition, any changes that were not committed to the database will be lost.

When you make changes to the Worksheet, all of the records will be verified and updated, regardless of whether or not the record was actually changed.

Always click the X to save while in Tabbed Folder Add. As with most windows programs, the **Save** button on the Tool bar or Click **File** > **Save** from the Menu Bar are also available

Cautions on Deleting Data

Trns•port has three levels of delete that are available in some instances they are described here, with the caution that users should in general Never use Power or Strong delete unless the full effect of the action is understood.

Delete The lowest level of deleting. Usually deletes one data record from one file, and one Delete Warning window.

Power Delete This second level of deleting, deletes multiple records from more than one file. Two Delete Warning windows will appear. For example, if you are deleting a bid-letting package, Power Delete will delete the letting call, bids, planholders, and proposal.

Strong Delete The third level of deleting, deletes multiple records from more than one file and three Delete Warning windows will appear. For example, if you are deleting a bid-letting package, Strong Delete will delete the letting call, bids, planholders, the proposal and the projects, items and funds (the whole tree of data).

The Breakdowns Tab

A default value of "1" and "Worksheet Breakdown Default" should appear automatically to satisfy Trns•port system requirements.

This tab is used for construction projects to classify them using the "search 16" process and contractor qualifications.

The Worksheet Tab

Adding Items to Project Categories

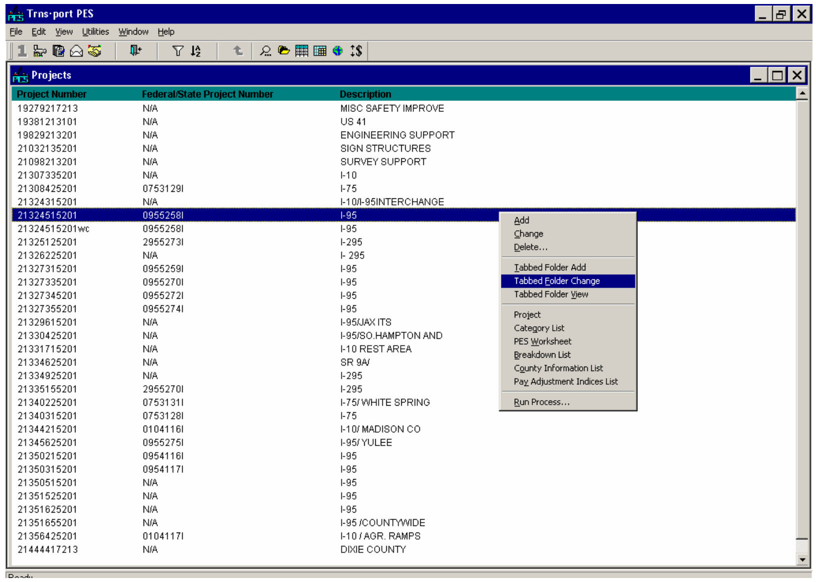
The FM system has no Item data. Most of the work will be in this Worksheet tab entering Items and quantities.

All items must be associated with a category under a project. An item is put under a particular category for several reasons. First, it fits with that grouping of items. Assign the items to categories as they relate to the MMS activity the category represents.

There are several ways to add items to a project category. The first method is using the PES Worksheet. This method is good to use for initially adding many items, however it can be overwhelming if you are only updating a few item quantities or adding only a few items.

To access the Worksheet

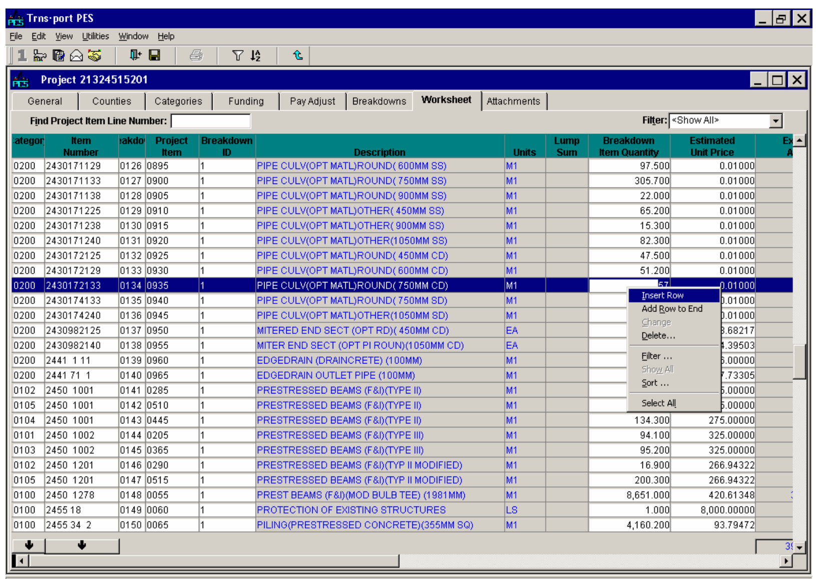
- Rclick the **Project** to see the Mouse Button Menu
- Click **Tabbed Folder Change**.
- Click the **Worksheet** tab.



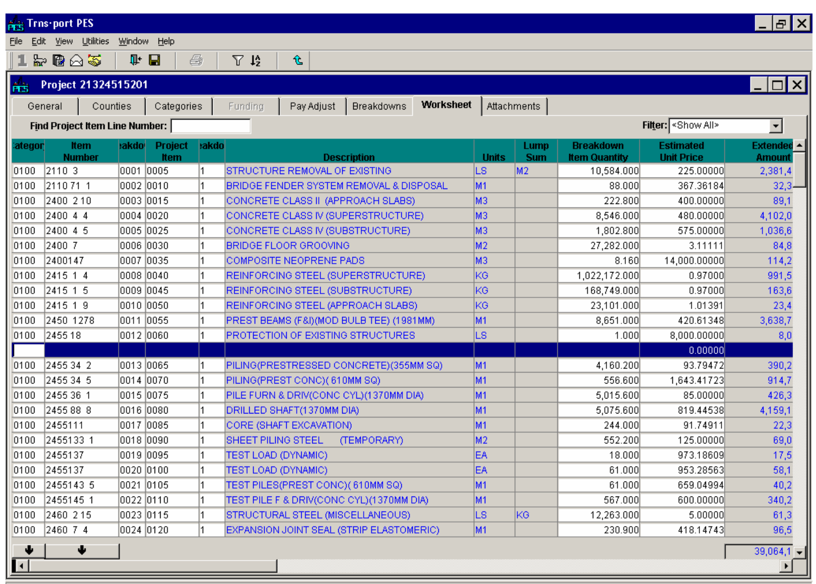
Adding and Deleting Rows

Add or delete rows in the Worksheet by

- Rclick in the **Worksheet** to see the Mouse Button Menu.
- Click the appropriate action.



- Click **Insert Row,** and a blank row will be inserted prior to the highlighted item.
- Click **Add Row to End** and a blank row will be inserted at the end of the Worksheet.



On a blank screen, the option that will show in the **Rclick** menu will be **Add**. The Insert Row and Add Row to End will not appear on the list until other rows are there. Select these options from the **Edit** option on the Menu Bar.

To quickly add many rows to the end of the worksheet, hold down the **<Shift>** key and press the **<Insert>** key repeatedly.

- Click **Delete,** and all of the selected (highlighted) rows will be deleted. There will be a delete confirmation screen.

The data in any grayed out columns cannot be updated.

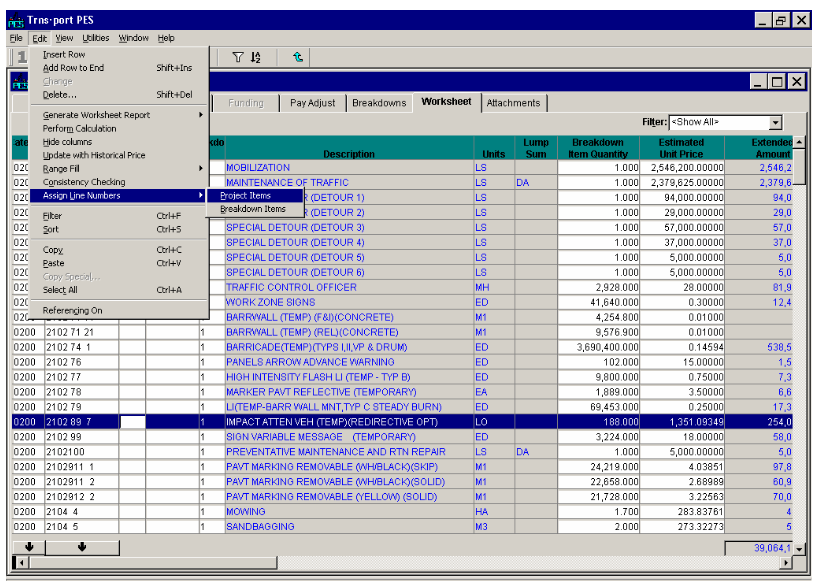
To update a field

- Click the field.
- Enter the new data.

The arrow button beneath the Item Number column will open the item List from which to choose an item. Keep in mind that this takes a while to load so it is better to just type the Item Number in if you know it. The item description and some of the other grayed out fields will automatically be populated from the item Reference table.

Any fields that are flags must have a value of either "**Y**" or "**N**". These values **MUST be capital letters.**

Even though the Department is not using breakdowns, the Worksheet was designed around breakdowns and breakdown items. Therefore, several fields are required even though they will not be used. Breakdown ID is one of these fields. The number "**1**" should always be entered for this field. The **Breakdown Item Line No** and the **Project Item Line No** column are also required. These columns each contain sequential numbers. There are automated methods of generating these numbers.



To generate the sequential numbers for the Worksheet

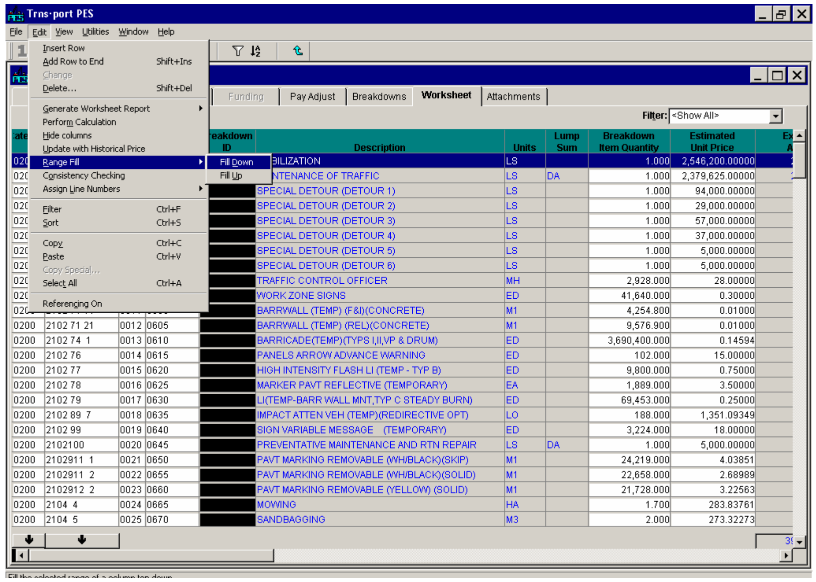
- Click **Edit** > **Assign Line Numbers** from the Menu Bar.
- Click **Project items** or **Breakdown items** as appropriate.

Project item Line numbers will be generated in increments of five. Breakdown Line item numbers will be generated in increments of one.

To set the Breakdown Id of all records to "**1**",

- Enter a "**1**" in the first record and tab out of that field.
- Click on the Column Heading to highlight the **Breakdown ID** column.
- Click **Edit > Range Fill > Fill Down** from the Menu Bar.

This will populate all of the records with a Breakdown Id of "**1**".



The Range Fill option will fill all of the records. Partial range fill is not currently supported.

Worksheet Field Definitions

Breakdown ID Not used, but required by Trns•port. If the default value of 0001 does not appear, enter a value of 0001. Use the **Edit > Range Fill** option to set all occurrences to 0001.

Breakdown item Comment Not used.

Breakdown item Generic Number 1 Not used.

Breakdown item Generic String 1 Not used.

Breakdown Item Line Number This is a required field. It can be entered automatically. To assign this number Click **Edit > Assign Line Numbers > Breakdown items** from the Menu Bar.

Breakdown Item Quantity Enter the quantity for the Item.

Category Number Enter the Category Number from the drop down window.

Extended Amount The product of the quantity times the price. Trns•port automatically calculates this field.

Item Alternate This is a 3-digit code used to identify alternate items. Maintenance currently does not use alternate items.

Item Description System generated when an Item Number is selected.

Item Number The pay Item Number from the Master Pay item List. It is contained in the ITEMLIST code table of Trns•port.

Item Units The unit of measure for the Item, which is system generated.

Pre-established Price Flag The Pre-established Price Flag field determines whether the Estimated Price of an item will be automatically entered on bidders proposal schedules. If set to "**Y**" then the item will appear on the bid blanks, however the unit price will be filled in and not bid on by the bidder.

Price Lock Flag The Price Lock flag field indicates whether manually entered estimate price information for any automatic processes will update items. Enter "Y" in this field to restrict modifications to manually entered information, in other words, to "lock" the manually entered prices.

Price Source The Price Source field identifies the source of the Estimated Unit Price. The entry in the Price Source field must be a value from the PRICSRC code table.

Project Item Generic Code 1 Not in use.

Project Item Line Number The Project item Line Number field is a four digit number Trns•port uses to identify the item. Trns•port will automatically enter this value it runs a process. These numbers may be entered directly in the worksheet by selecting **Edit > Assign Line Numbers > Project items**.

State Mat Flag (Non-Bid item) The default value for this field is "**N**". Non-Bid items will **not** appear in any bid documents, and will **not** be passed to SiteManager. A common use for this field is to identify FHP use on a project.

Estimated Quantity Used by Trns•port to determine the extended cost of an item. It is generated from the Breakdown item Quantity and cannot be changed.

Supplemental Description Part One Not in use.

Supplemental Description Part Two Not in use.

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.

Customizing the Worksheet

You may do some things to customize the look of the Worksheet. Change the size and location of a column or hide columns. See Appendix C for a more complete discussion on customizing the worksheet. With Citrix Metaframe, the customizations discussed here will be saved to the Citrix Server in use when the changes were saved. You will have to re-do these settings for each server in use.

Rearranging Columns in the Worksheet

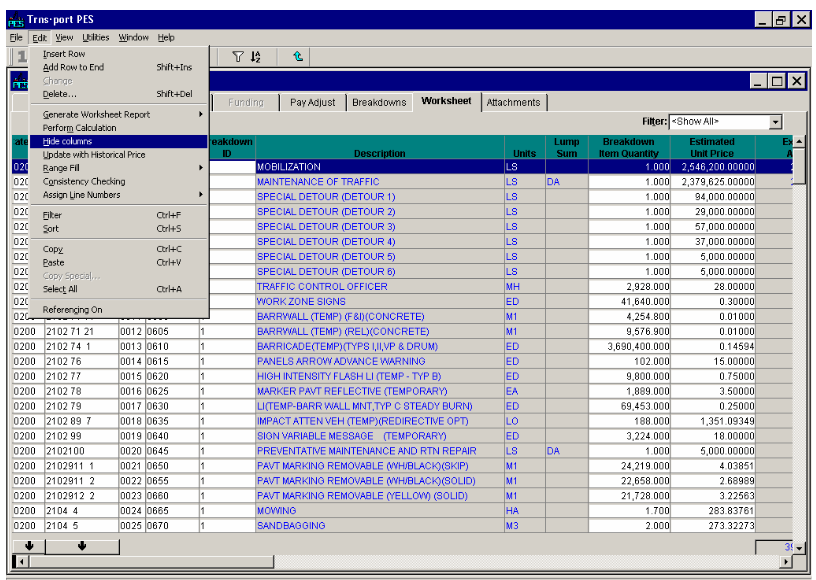
To rearrange the order of the columns in the Worksheet, put the cursor on the heading of the column to move and hold down the left mouse button while you drag the column to its new location. You may only move the column around on the screen that is currently visible, so you may have to drag and drop several times.

Resizing Columns

To resize a column, place the cursor on the right hand vertical gridline of the column heading to resize. The cursor will change from an arrow to a vertical bar with two arrows on each side. Hold the left mouse button down, drag and drop the vertical line to where you want it.

Hiding Columns

Some Worksheet columns such as the Generic fields will not be used. These can be hidden so the Worksheet is smaller. This also protects from inadvertently entering information in the fields. This is important in the case of the Supplemental Description field, because data in this field affects how items roll up on the proposal. The Department has made the decision **NOT to use the Supplemental Description field**.



To hide columns,

- Click **Edit > Hide Columns** from the Menu Bar.

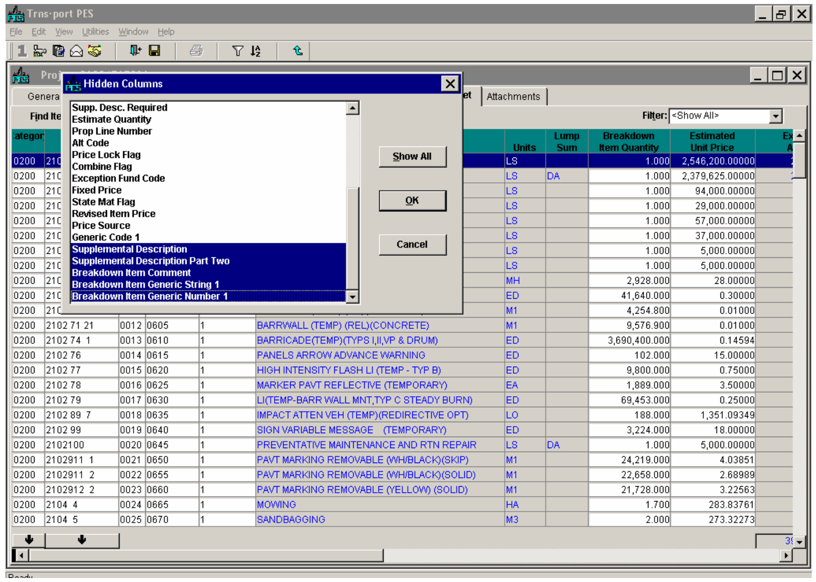
This will open a screen that shows all of the columns that can appear on the Worksheet.

- Highlight the columns to be hidden by clicking on them.

To re-show a particular column click it to un-select it.

To show all columns again,

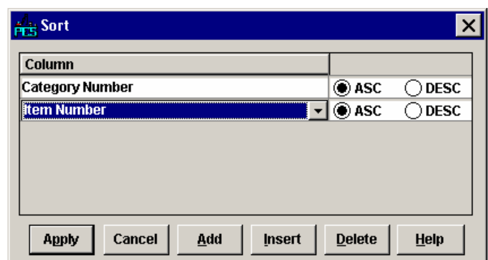
- Click the **Show All** button.



Sorting Records in the Worksheet

To sort the records in the Worksheet, click the **Sort Button** e Tool Bar.

- Choose the columns to sort and their order.
- To add additional fields, Click the **Add** button.
- Click the **Apply** button when complete.

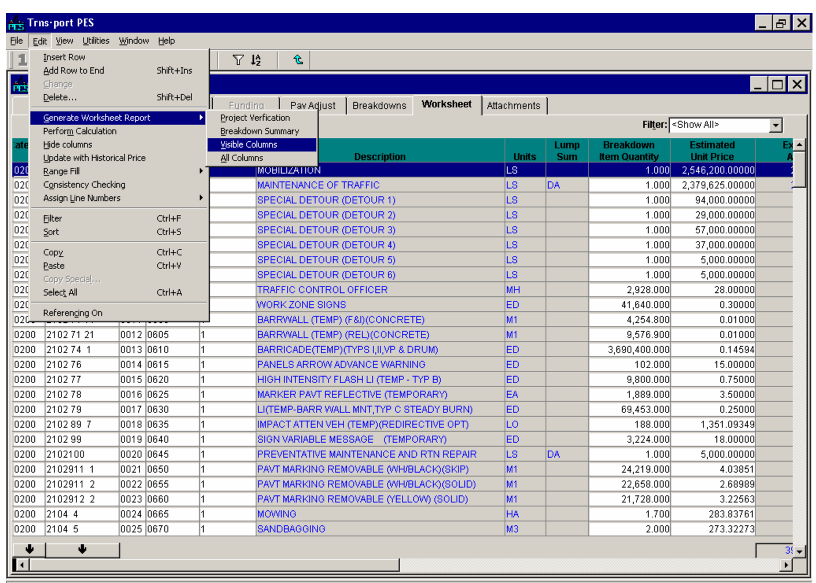


Printing the Worksheet

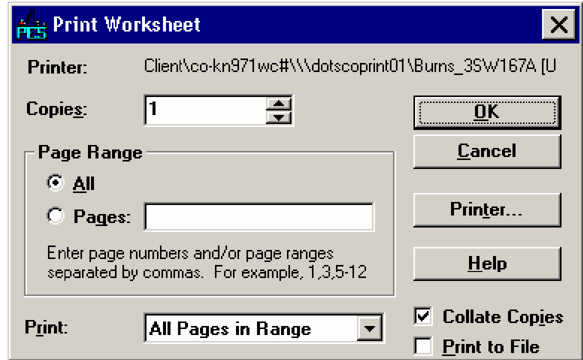
To verify what Worksheet data, it is often helpful to have a hardcopy report to look at. Get a listing of the Worksheet by running a Worksheet Report.

To do this,

- Click **Edit > Generate Worksheet Report > Visible Columns** from the Menu Bar.



The Print Worksheet message window will open showing the printer to be used.



If the printer is correct

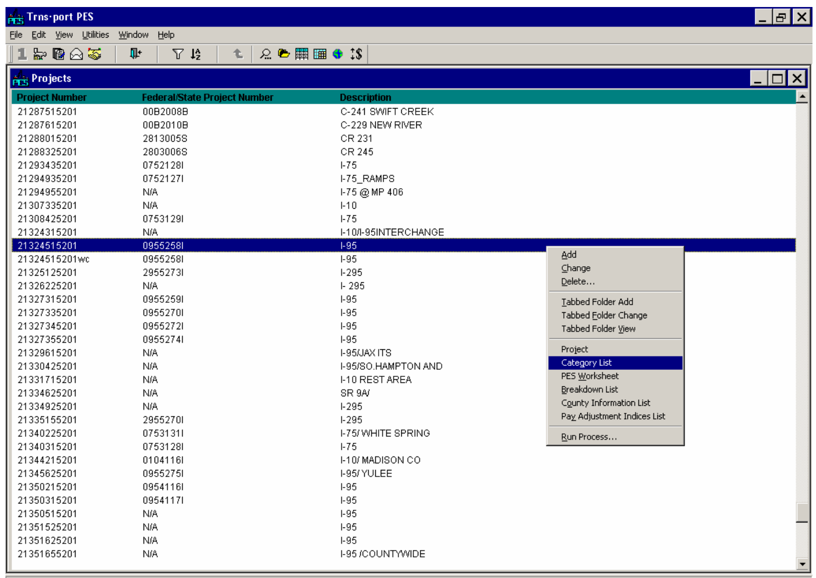
- Click **OK**

Otherwise

- Click **Printer**
- Select another printer.
- Click **OK**

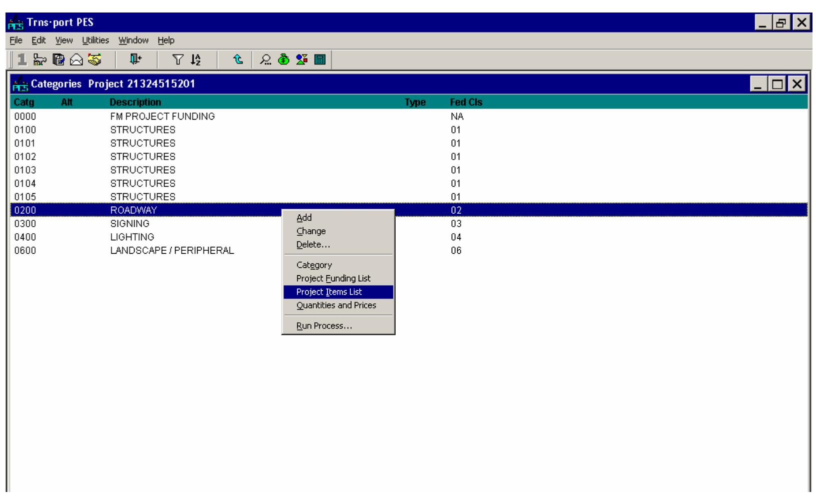
Using the Drill-Down Method

The Drill-Down method involves selecting a particular object and then **Rclick** it to Drill-Down to the next level or **DblClick** to update the associated information. This method deals with one Item record at a time within one category at a time within one project at a time.



Adding Items

By using the Drill-Down method, you may open a window that shows all of the detail of an element in a single display. For Pay Items, this window is very similar to the one seen at the Master Item list. For Categories, it is similar to the lower window portion of the Categories Tab with pages one and two combined.

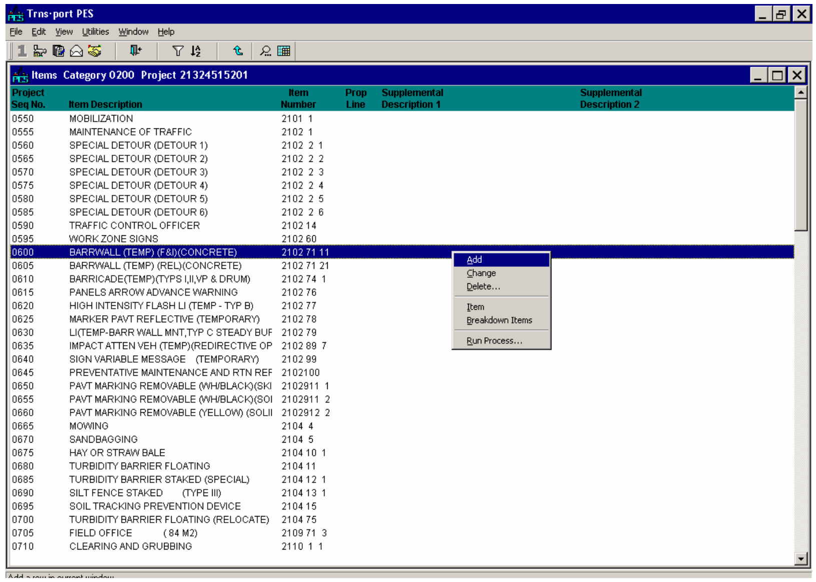


To Drill-Down on a project to the category level

- Rclick the **project** of interest.
- Click **Category List** from the Mouse Button Menu.

The list of categories will open.

- Rclick the **category** to which to add the items.
- Click **Project items List**.



From the Item List window,

- DblClick the item to update.

Or

- Rclick and Click **Item** or **Change**.

To add a new item,

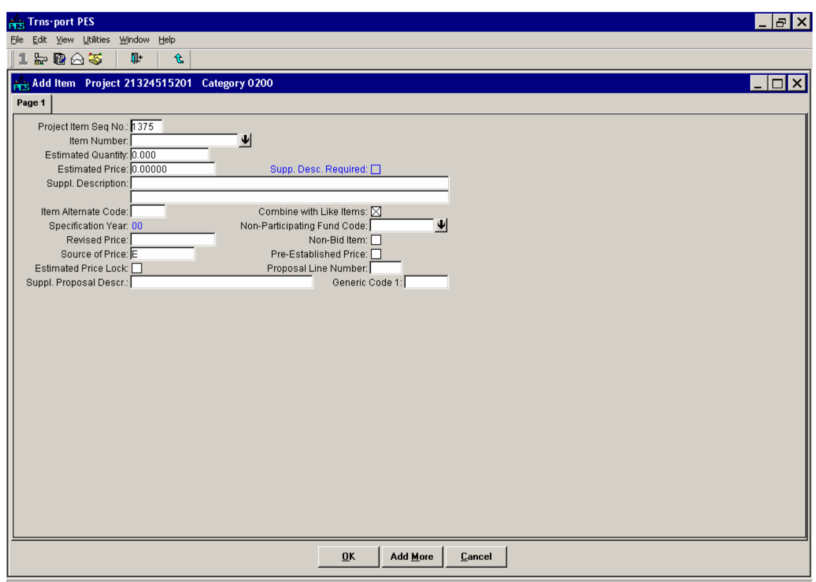
- Rclick
- Click **Add**.

To delete an item

- Rclick
- Click **Delete**.

To enter changes, first click the **Change** button if you opened the window with a DblClick. The down arrow after the Item Number field will open the **Item**. As in the Worksheet, this takes a while so if you know the item numbers it is faster to type them in. Some fields are backed by a code table, and when you click the field, or tab to the field, the arrow will appear allowing selection from the table. Click **Close** to save the changes and exit the screen.

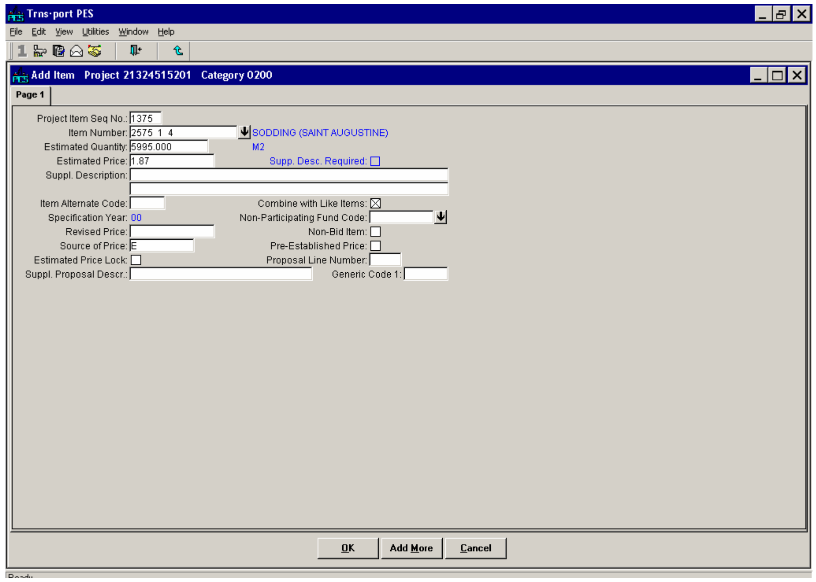
When you **Rclick** from the Item List and Click **Add**, you will get a mostly empty screen. Unlike the Worksheet, this screen will not refer to Breakdown fields and the **Item Line Number** is automatically assigned. When re-opening the Worksheet after adding items through the Drill-Down method, the breakdown fields will be empty. Remember to fill them in the Worksheet.



This is an example of an Add Item Screen.

After entering the Item Number and leave that field, the program will automatically enter the description and the default for the Combine with Like items Flag.

Note that the Project item Sequence Number is assigned automatically. In the Worksheet, you had to generate this number.



When you are finished entering the information,

- Click **OK** to save the record.
- To keep adding records click the **ADD MORE** button.

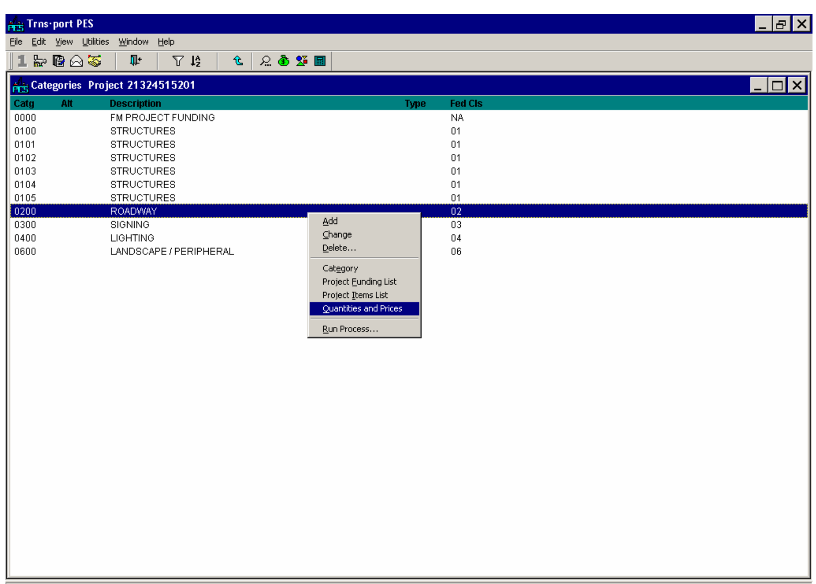
The key difference between the Worksheet and the Drill-Down methods is that the Worksheet processes many records at a time and the Drill-Down method deals with one record at a time.

Updating item Quantities and Prices using the Quantities and Prices Window

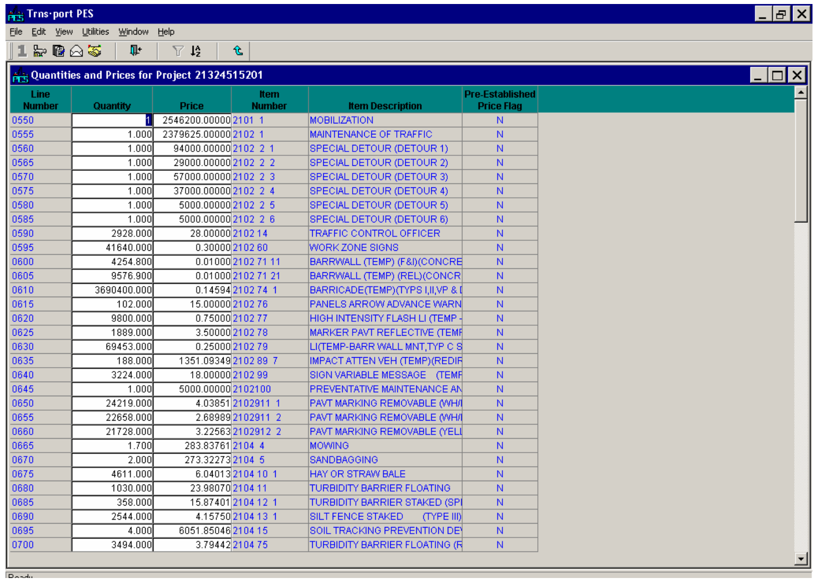
The Quantities and Prices window is a screen that allows updating of only the item Quantity and the Estimated Price. You may not add or delete items using this screen. It is helpful in the case where you have copied the items from another project or a template project and you only need to change the quantities of the items. This screen is also accessed via the Drill-Down method.

To access this screen,

- Rclick the **Project**
- Rclick the **Category List**
- Rclick the desired **Category**
- Click **Quantities and Prices**.



- Enter the quantities or estimated prices for the items.



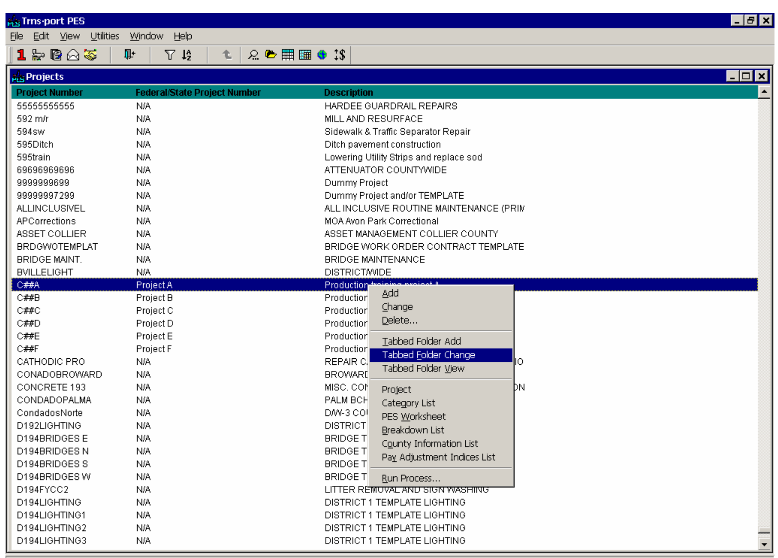
Use the Sort function here to get the items into the order that is best for performing the updates.

Hide columns and move columns around in the Worksheet. However, the changes are not saved, as they are when customizing the Worksheet. They will only be there for the duration of the stay in that window.

Combining Projects

You may want to combine project information when different people have developed different portions of a project that in the whole has extensive category and pay item detail. You could have a situation where three people are developing a project in separate parts, such as lighting, or signing and marking, or structures, where each one has developed details in these several categories.

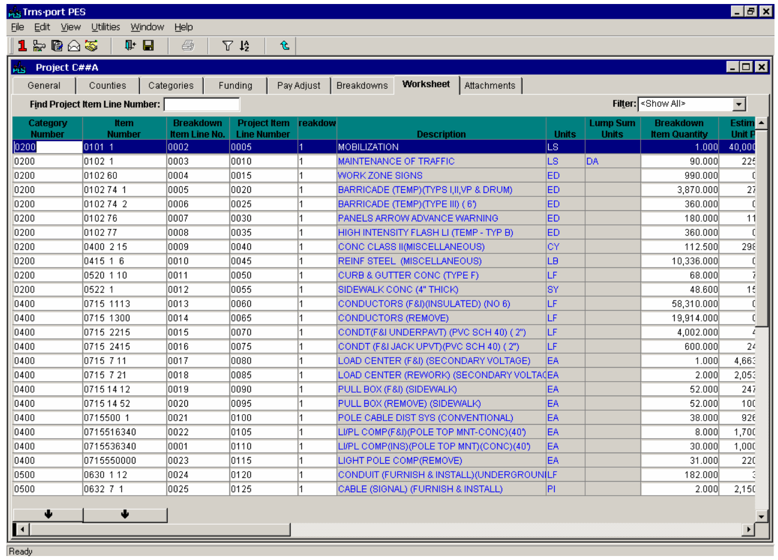
- To combine the work, designate one of the projects as the host project. This would usually be the project having the real FINPROJ Number as its ***Project Control Number***.
- Verify that all of the category numbers to be involved in the ultimate project pre-exist in the host project.
- If you have made any last minute changes to the host project, save it so that the project information exists in the database as well as in the memory of the PC. The database is where the process of combining the projects will occur.



To combine two or more projects into a single project:

- Click the **host** project in the Projects List window.

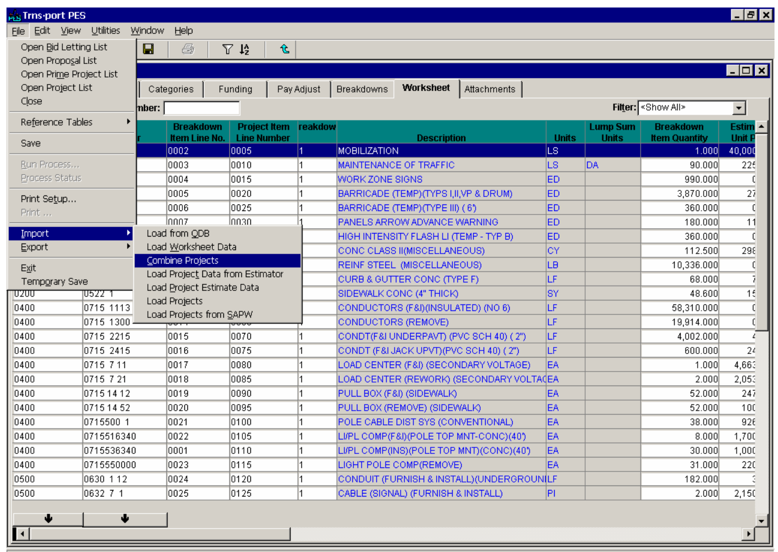
Trns•port will keep the header from this project and add categories and pay items from other projects to it.



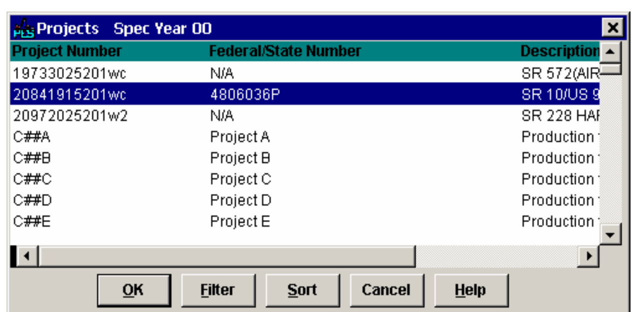
- Click **Tabbed Folder Change** to open the project.
- Click the **Worksheet** tab to open the Worksheet for the selected project.

Note that in this case, there are pay items displayed, but in another situation, there may not be. A view of the category tab of this project would reveal that all necessary category numbers exist.

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

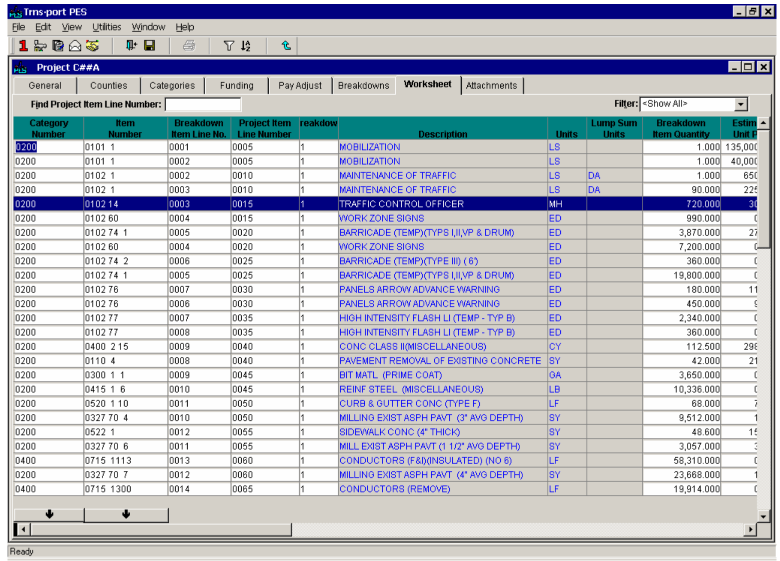


Trns•port displays a list of projects. Use the Filter and Sort options to help locate projects to combine. Only combine projects that have the same ***Pay Item Year*** and same ***Unit System***.



- Click a **Project Number** to combine.
- Click OK.

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



- To combine other projects with the first project, repeat these steps for each one.
- When all projects have been combined, rerun the Assign Line Numbers process for both Project Line Numbers and Breakdown Line Numbers.

Generating Reports and Running Processes

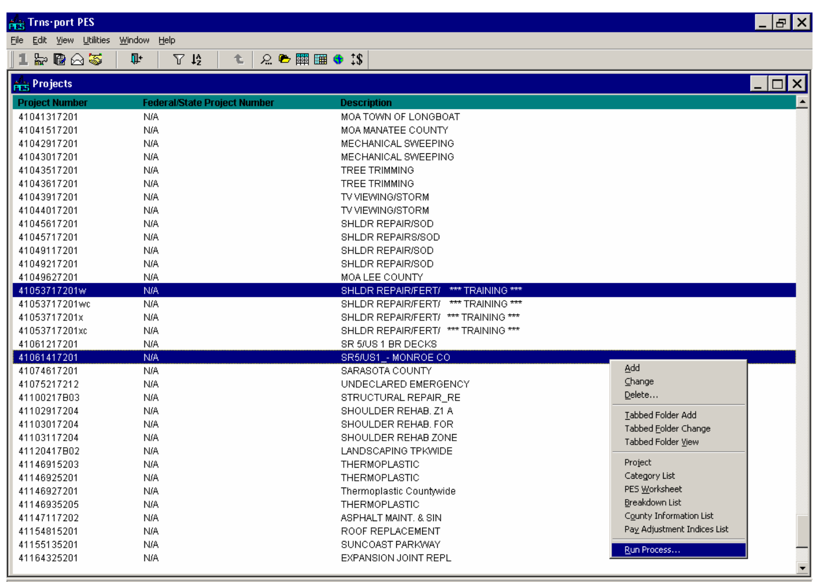
In PES, reports and other batch jobs are run by the Run Process selection. For more on generating reports see Appendix D.

Project Level Reports

Using the Mouse Button Menu

After entering projects, add categories, and items, and designate where the work is being done, run project-level reports. The Preliminary Detail Estimate process produces a printed report that details the Items. Trns•port also summarizes the estimate with subtotals for item categories and funds.

- Click the project for which to generate reports in the Projects List window.

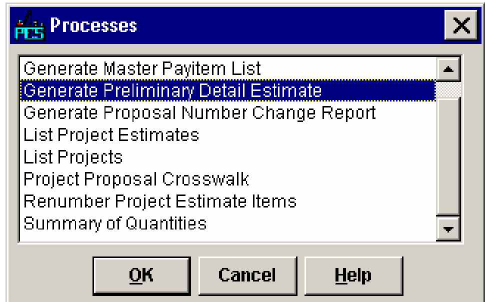


(To select more than one project, hold down the CTRL key and select additional projects with the mouse).

- Click **Run Process** from the Mouse Button Menu.

This will display a list of processes that are available.

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



Generating a Preliminary Detail Estimate

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.

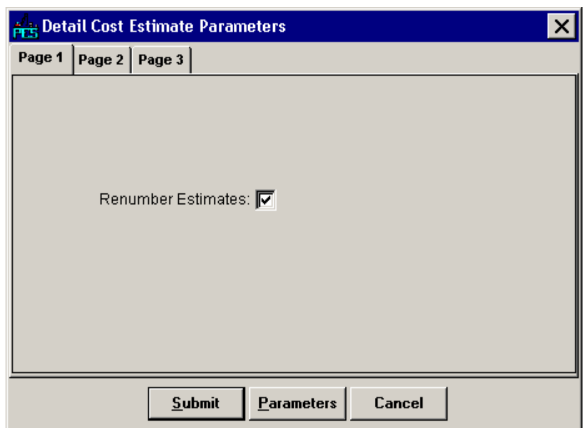
To run a Preliminary detail Estimate,

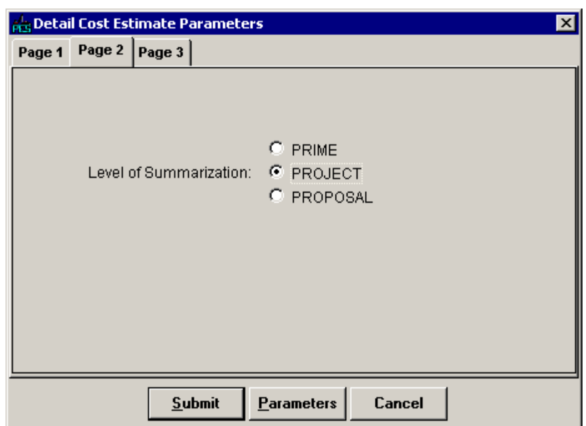
- Click **Generate Preliminary Detail Estimate** from the Processes List window
- Click **OK**.

Trns•port displays the Detail Cost Estimate Parameters window.

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

- Click the box to set the check mar.
- Click the Page 2 tab.





On page 2, enter the level of summarization. Project is the default level. This option determines whether to run the Detail Estimate for a project, prime project, or proposal. The Department is not using prime projects. After entering the level of summarization,

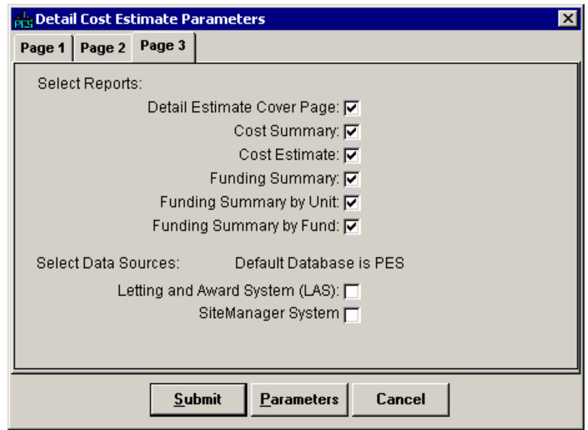
- Click the Page 3 tab.

Page 3 shows the Parameters window, which allows you to select the reports to produce.

- Check the boxes of the reports to generate.
- Click **Submit** to run the process.
- Click **Parameters** to change process submission parameters.

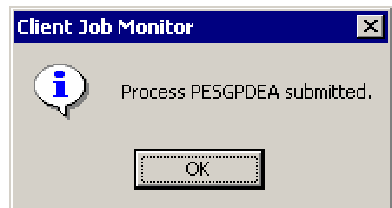
Or

- Click **Cancel** to return to the Projects List window without running a process.



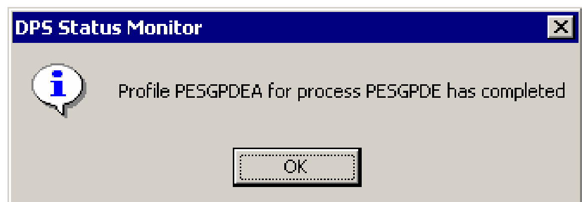
When you click Submit, two informational windows will appear.

The first will inform you that the process has been submitted. When they appear,



- Click **OK.**

When the process is completed, this window will appear.



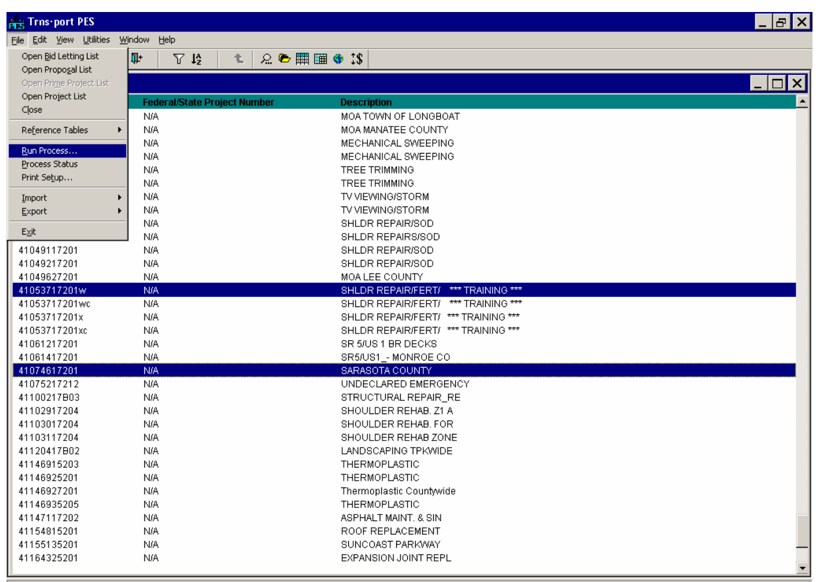
- Click **OK.**

Using the Menu Bar

Select the project or projects for which you will run reports. To do this, click the project in the Project List window. To select more than one project, use the **<Ctrl>** key and/or the **<Shift>** key.

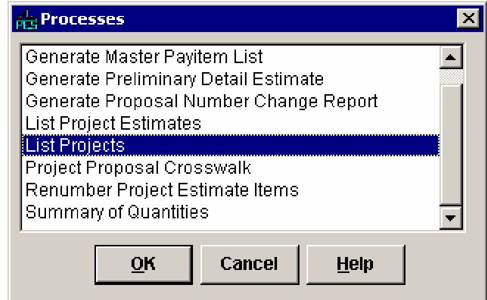
Then,

- Click **File > Run Process** from the Menu Bar.



The Process List will appear. The contents of the Process List window will vary depending upon what object you are running the process on (project verses proposal, etc.).

The List Projects report will generate a report that lists project header information for all selected projects.

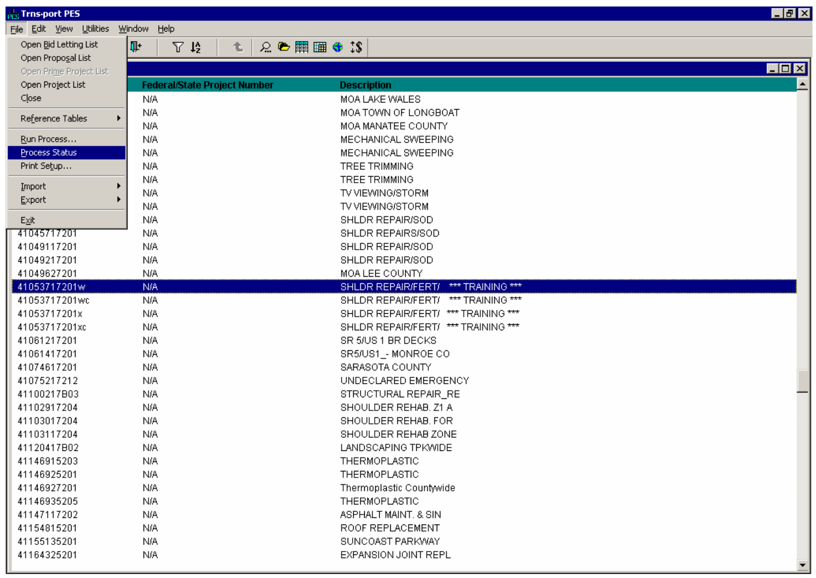


Proceed as above when using the Mouse Button Menu commands.

Viewing Reports

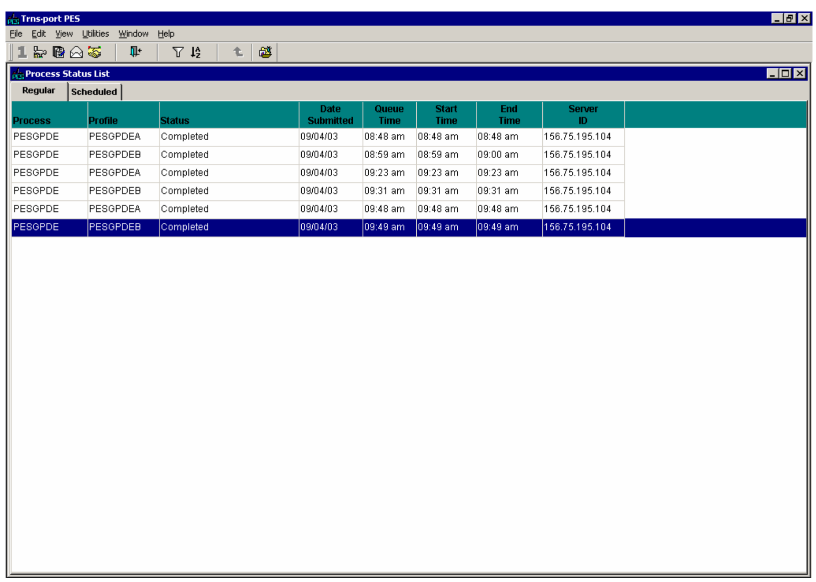
To see the results of this process, from the Menu bar,

- Click **File > Process Status.**

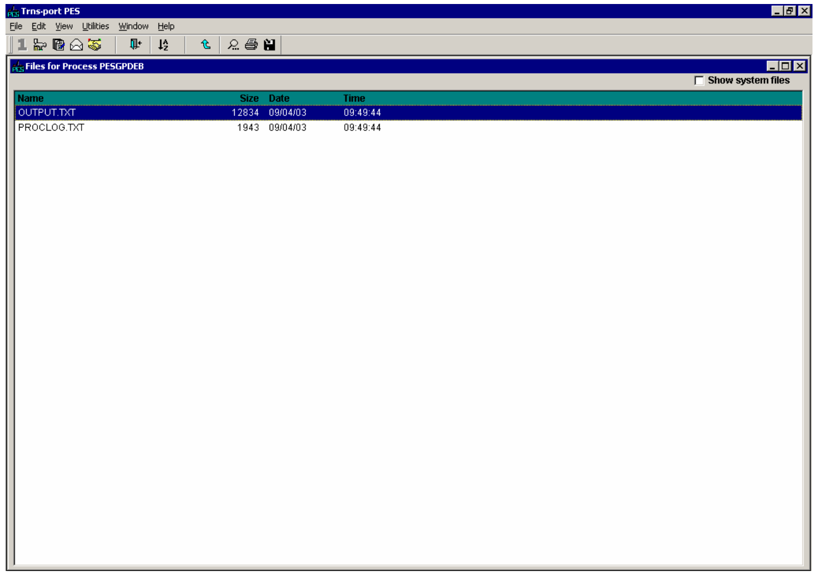


This screen lists all of the processes recently run.

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



Usually reports are labeled OUTPUT.TXT. Sometimes there will be more than one report available. For example, you may have an exception report in addition to the regular report.

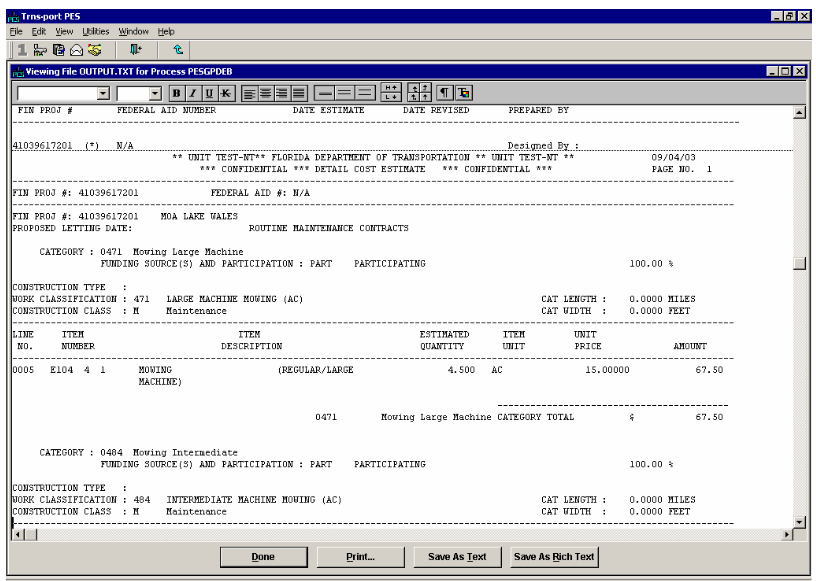


These are the reports available from this process.

- Click the report to be opened.
- DblClick the report OUTPUT.TXT and review the report on screen.

The **Show system files** check box will show all of the files the system generates. If the process gets an error when it is run, you may need to look at these files when you work with the System Administrator to debug the problem. Otherwise, leave the box unchecked to limit the list of output files displayed.

The report window has a toolbar associated with it that permits text editing. You may highlight a word or phrase and change the font, use line out, bold etc.



Scroll through the report by using the scroll bars at the left and at the bottom of the screen.

When you have determined that you want a copy of the report,

- Click the **Print** button at the bottom of the screen.

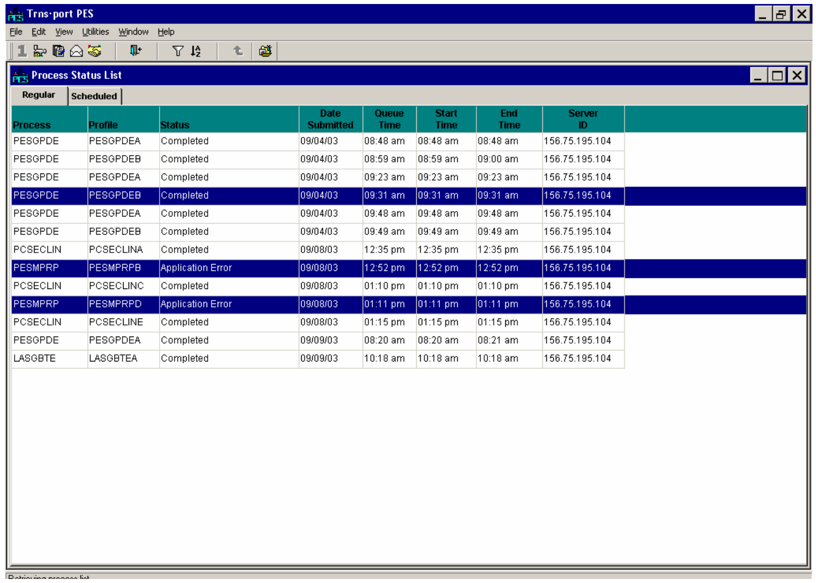
The **Save As Text** and **Save As Rich Text** buttons allow you to save the report to a file on the PC.

The **Done** button closes this screen and returns to the output list screen.

Deleting Reports

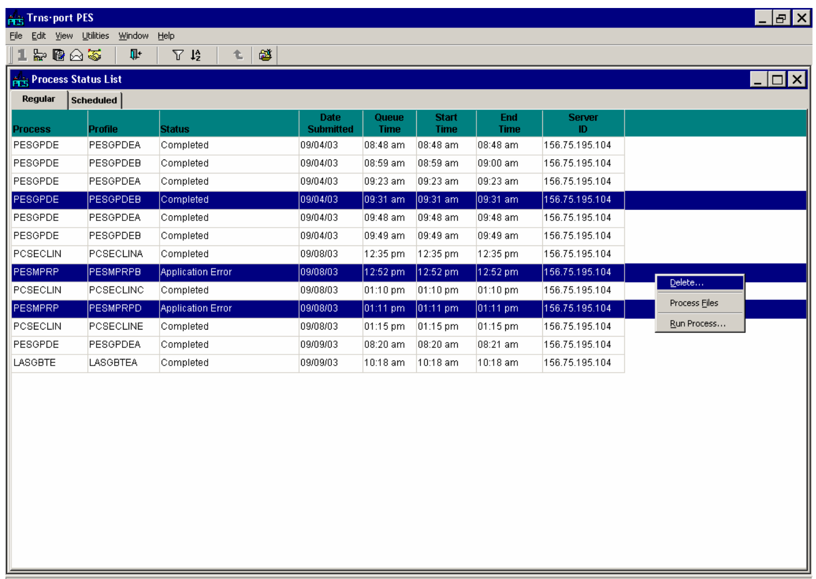
Over time, this Process Status List window will grow to the point that the scroll bar is needed to see all of the reports. Each user will need to delete reports that are no longer needed. To do this,

- Hold down the CTRL key.
- Click each process to be deleted. In this example three records have been highlighted.



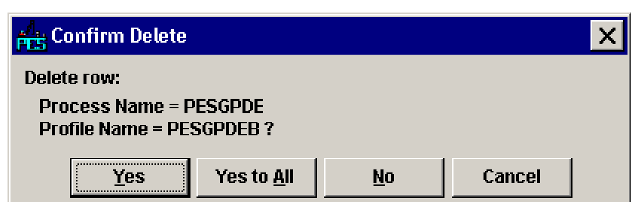
After highlighting the rows to be deleted,

- Place the cursor on one of the blue bands.
- Rclick to open the Mouse Button Menu
- Click **Delete**.

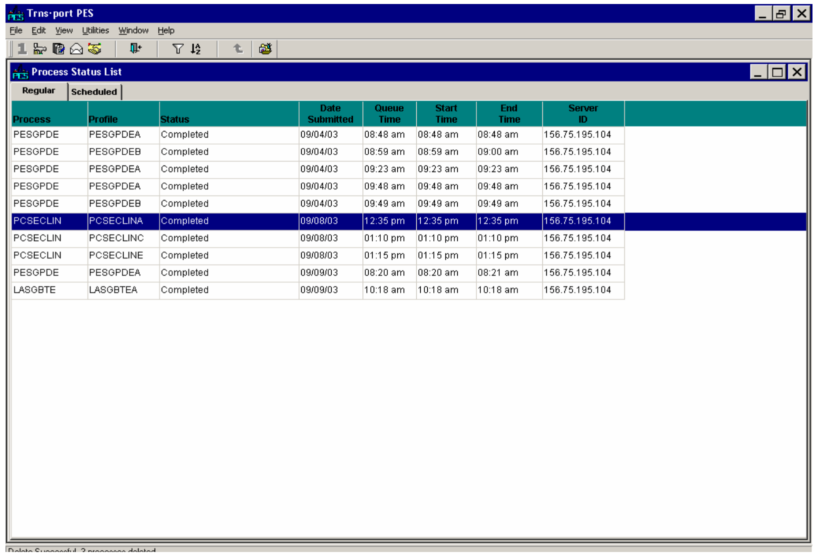


A delete confirmation window will.

- Click **YES TO ALL**



The Process Status List window will appear. It will be necessary to routinely delete unneeded process files



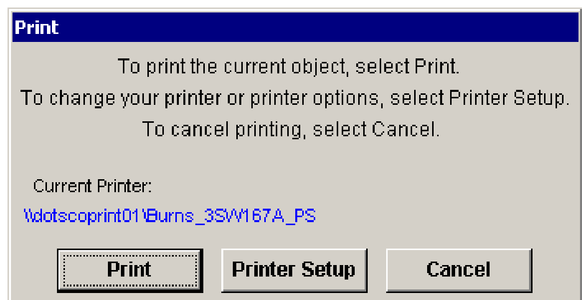
Printing Reports

To print the report,

- Click the **Print** button

A window will open showing the default printer you set up for Citrix.

- Click Print again and the report will go to the designated printer.

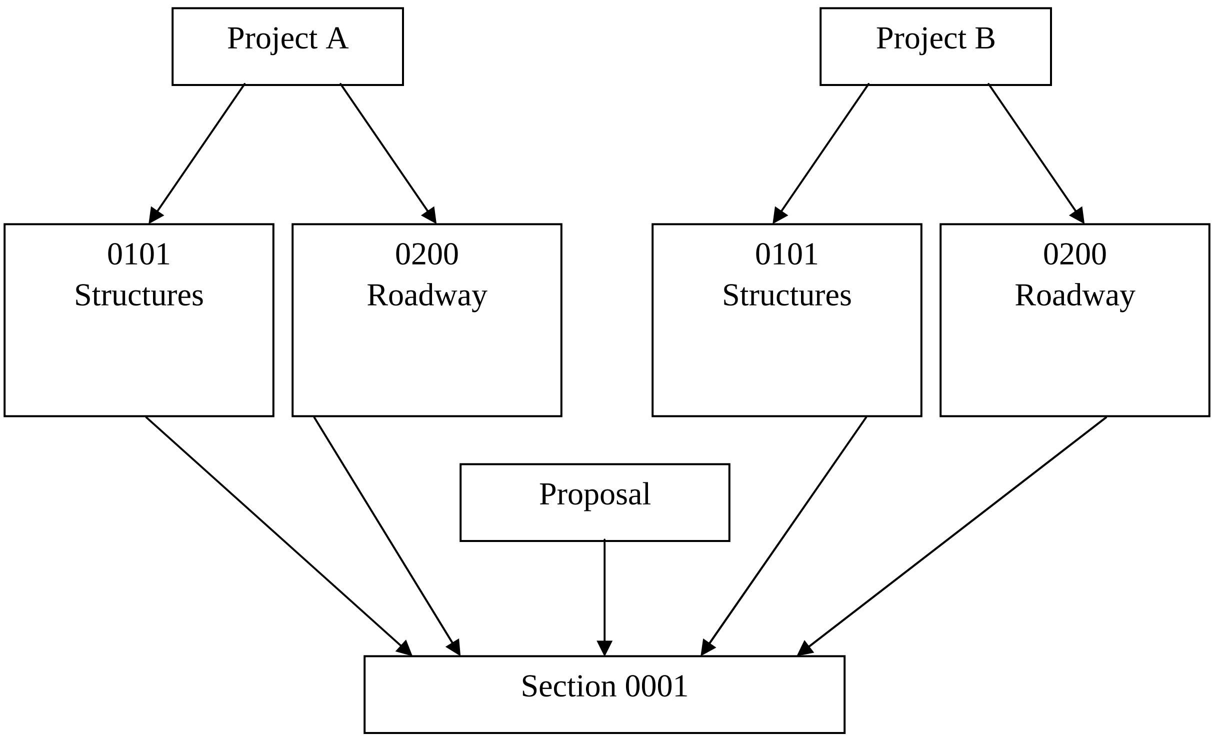


If the report is printing in Portrait, click the Printer Setup button, and at the layout tab, change the layout to landscape.

NOTE: If you have not previously done so, configure Citrix Metaframe to print the reports. Follow the procedures in Appendix D.

Creating Proposals

A Proposal in PES is one or more projects that are going to be let as one entity. A Proposal becomes a Contract once it is awarded. In a Project, you had Category and Project Line Item Numbers. In a Proposal, you will have Sections and Proposal Line Numbers that serve a similar function in managing the proposal. In a project, the Combine Like Items flag determine which items are combined for bidding purposes. The Combine with Like Categories flag controls how categories are presented to the Bidders on the Proposal. If Categories and items are set to combine, then the quantities will be added together and presented only once on the Proposal for bidding. Sections are created from Categories. The example below illustrates what happens in a Proposal when two Projects are "strung" together under the same Proposal.



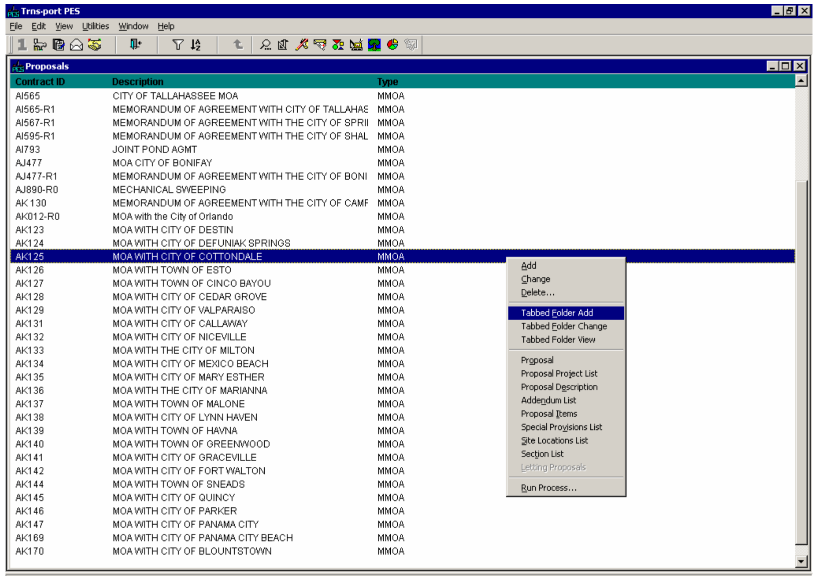
In this example, the Categories in both Projects are set to combine, with an **X** in the **Combine w/Like Categories** box. All of the items in each Category are marked to Combine with **Y** in the **Combine flag** column on the worksheet.

In some views, flags may be set with a check mark (√), while in other views they may be set with an **x**. In either case, these marks are converted to **Y** when the data is saved and transferred to the database. If a box has a "blank in it, it is transferred to the data base as an **N**.

The Proposal automatically rolled up all of the item quantities in the Categories for both Projects and put them in Section 0001. Each item will appear in Section 0001 only once.

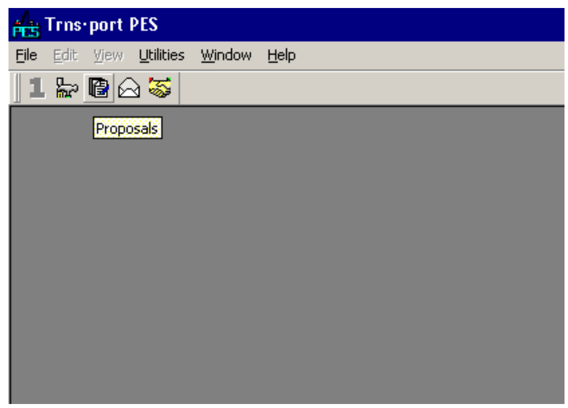
If any category had been marked as Combine = **N**, then another Section would be created. If any item had been marked as Combine = **N**, then that item would appear twice (or more) under the combined Section 0001.

Like a Project, a Proposal has a Control Group assigned to it to control who can see which Proposals. **When you create a Proposal, it defaults to your personal Control Group.** Change this immediately if you have an "*****" or "**?**" in your group. It must be changed prior to adding a project to the proposal. Save the Proposal after you fill in the Proposal General Tab and then reopen the proposal to add the rest of the Proposal information and attach Projects.



To access the Proposal List window,

- Click the **Proposal** icon. 



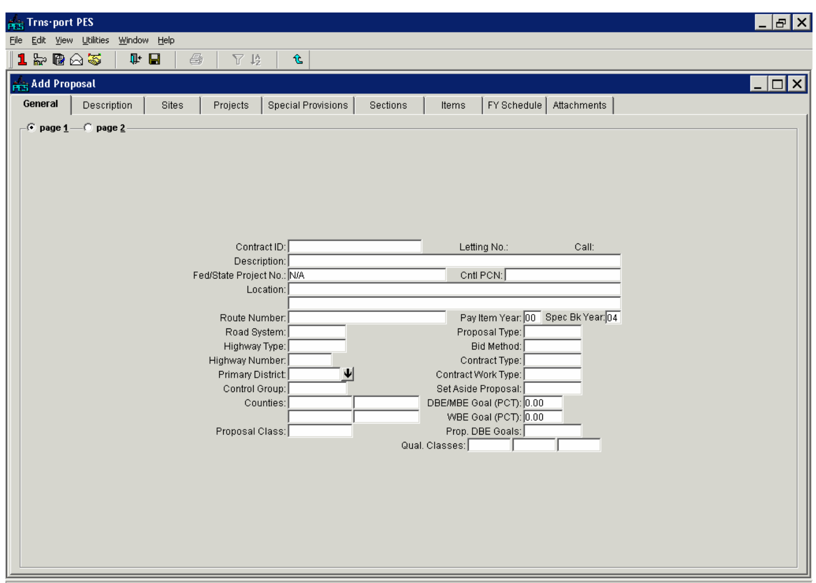
To add a new Proposal,

- Rclick in the Proposal List window and
- Select **Tabbed Folder Add**.

For the Proposal, we will be doing everything with the Tabbed Folder functions.

Proposal Data

The General Tab



General Tab Page 1

This is the blank Tabbed Folder for a new Proposal. Notice the similarity to the Project Tabbed Folder; there is a General Tab with two pages of information and other tabs that contain other groups of records that pertain to the Proposal. The Department is not using the Special Provisions, FY Schedule, or Attachments Tabs at this time.

Page 1 of the General tab has the following 26 fields:

Contract ID A unique identifier for a proposal or contract. Enter the planned District 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.

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.

Letting Number A unique identifying number or alphanumeric for a letting. It may be composed of any combination of eight numbers and letters. For lettings in the districts, allocate two positions for the district number, two for the year, two for the month, and two for the date. This will be in the form of ##YYMMDD, where ## represents the district number. If the occasion should arise that you will hold a second letting on the same date, you may insert a "B" in position seven. The Central Office lettings commence with a prefix of CT. **This field will not be filled now.**

Call Number The order in which bids will be opened for a specified proposal during a bid letting. **This field will not be filled now.**

Description A short description of the proposal.

Federal/State Project Number The federal or state project number identifying a project, proposal, or contract.

Contl PCN This is the lead project to be associated with the proposal. Enter the Financial Project Number of the lead project.

Location The site where work is being performed for the proposal.

Route Number The route number or road number of the road that is affected by a project.

Pay Item Year The Item year identifier for Items to be used for the proposed contract.

Spec Bk Year The Specification Book to be used in the administration of the contract.

Road System A classification of the road. Select from the drop down menu.

Proposal Type A classification for the proposal. Choose from the drop down list to identify a proposal as either to be let in the District or in the Central Office.

Highway Type Not in use.

Bid Method For Alternative Bidding choose a value from the list box. Leave the the field blank if Alternative Bidding is not involved.

Highway Number The identifier for the road being worked on in a project.

Contract Type A value, selected from the attached CONTTYP code table. Note that there is a limitation on the use of CC in this field; wherein the Contract ID must begin with a T for Central office let contracts.

Primary District The managing district.

Contract Work Type Choose a code from the drop down window.

Control Group On adding a new proposal, the personal Control Group will be entered into the Control Group field of the proposal header. If the personal control group contains ? or *, change this control group before saving the proposal header. Enter a Control Group composed only of numbers and letters.

Set Aside Proposal Leave this field blank.

Counties Enter up to four counties for each proposal (select from the drop down list). Trns•port prints this information on some reports, but does not use it in processing.

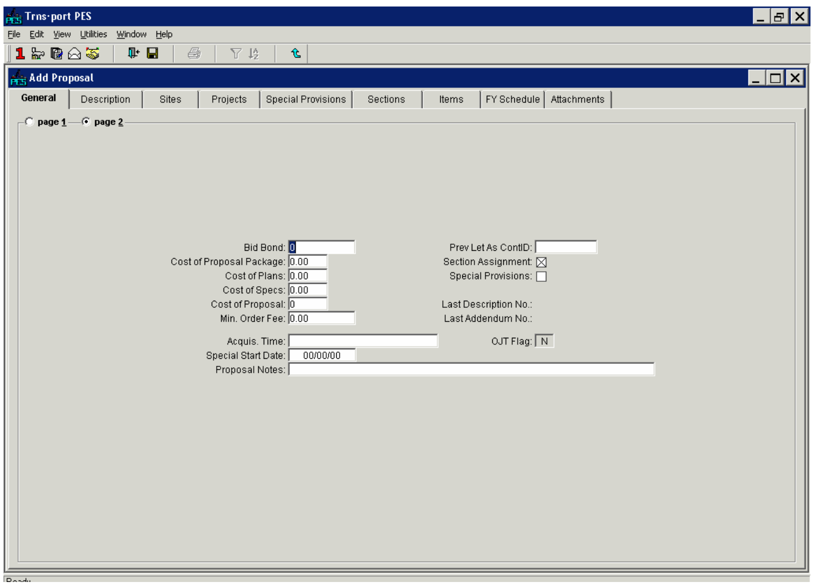
DBE/MBE Goal (PCT) Not in use at this time. A percentage goal set for disadvantaged (DBE) or minority (MBE) business enterprises for a proposal. The default value is 0.00.

WBE Goal (PCT) Not in use at this time. A percentage amount indicating the goal you have set for women business enterprises for the proposal. The default value is 0.00.

Proposal Class Select a value from the attached PROPCLS code table.

Prop DBE Goals Not in use at this time. A value, from the attached DBENOTE code table that indicates which of the two goals applies to this proposal. Choose NONE, and Trns•port will not print goals on any report. Choose DBE and Trns•port will only print the DBE/MBE goal and will label it a DBE goal. Choose BOTH, and Trns•port will print both the DBE/MBE goal (labeled as an MBE goal) and the WBE goal. Select from the drop down menu.

Qual. Classes Not in use at this time. A classification of work for which a vendor is qualified.



The General Tab Page 2

Bid Bond Not used at this time.

Prev Let As ContID Indicates the contract ID under which a proposal was previously advertised.

Cost of Proposal Package Used for planholder invoicing in the LAS module. This field shows the cost of the proposal package (bid blank, plans and specs). It has a default value of 0.0. This should be the cost before taxes.

Section Assignment   Flag telling Trns•port to assign project categories to proposal sections automatically or do it manually by entering section numbers in the category records. The default value is **Y**, which means Trns•port will automatically assign categories to sections.

Cost of Plans   Used for planholder invoicing in the LAS module. Trns•port will bill this cost to purchasers of complete plans for a proposal. The default value is 0.00. This should be the cost before taxes.

Special Provisions   This feature is not in use at this time. It is a flag used to tell Trns•port if special provisions will be assigned to this proposal. The default value is **N** (no special provisions). **Do not change this flag**.

Cost of Specs   Used for planholder invoicing in the LAS module. Trns•port will bill this cost to purchasers of complete plans for a proposal. The default value is 0.00. This should be the cost before taxes.

Cost of Proposal   Used for planholder invoicing in the LAS module. Trns•port will bill this cost to purchasers of complete plans for a proposal. The default value is 0.00. This should be the cost before taxes.

Min. Order Fee   Used for planholder invoicing in the LAS module. Trns•port will bill this cost to purchasers of complete plans for a proposal. The default value is 0.00. This should be the cost before taxes.

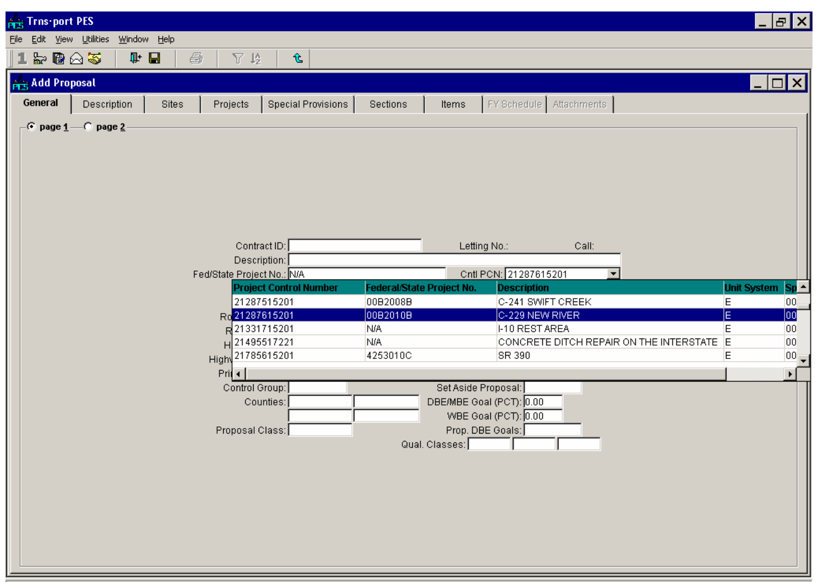
Acquis. Time   Used to identify special acquisition times for specialty items required to be fabricated under construction contracts.

OJT Flag   To identify contracts where OJT is required of the contractor. The Default is **N** for no.

Special Start Date   Used to identify a delayed start to a contract.

Proposal Notes   Not in use.

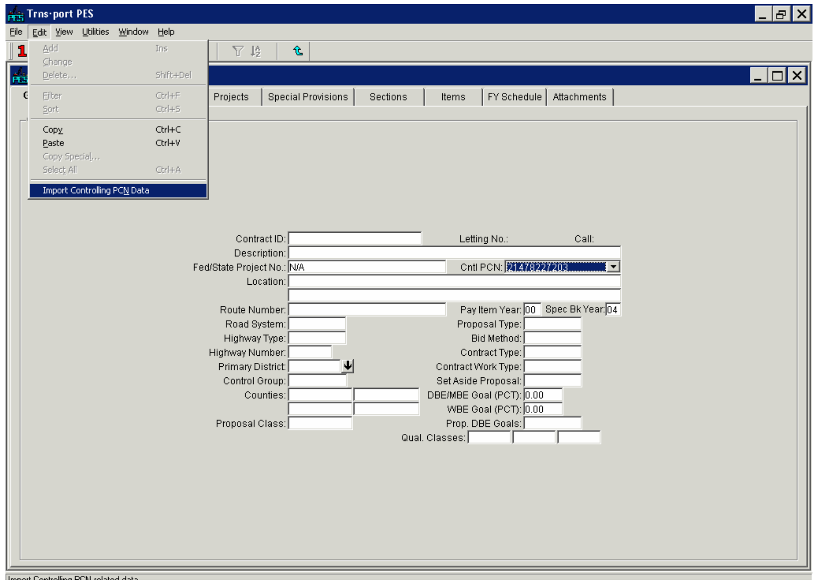
If there is only one Project to be attached to a Proposal, populate some of the basic proposal information by filling in the ***Cntl PCN*** field and importing the data for the Controlling PCN. This is also applicable for the lead project where two or more projects are strung together.



After entering the project number in the *Cntl PCN* field, from the Menu Bar,

- Click **Edit> Import Controlling PCN Data**.

This will enter information that is common from the Project Record. ***District, Pay Item Year, Description***, etc. This can save some typing if the proposal information will be the same as the project information, as well as reduce the chance of introducing errors.



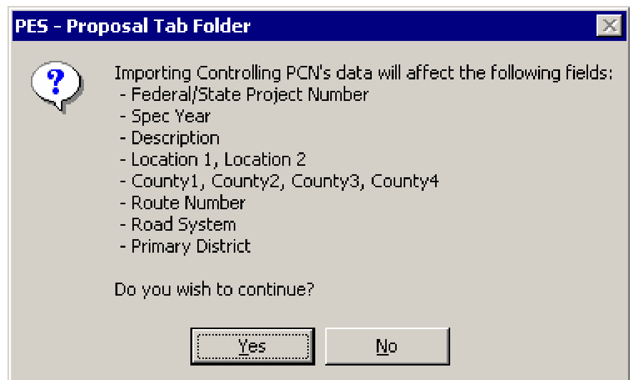
A confirmation screen will appear. To continue,

- Click **Yes**.

To stop the process,

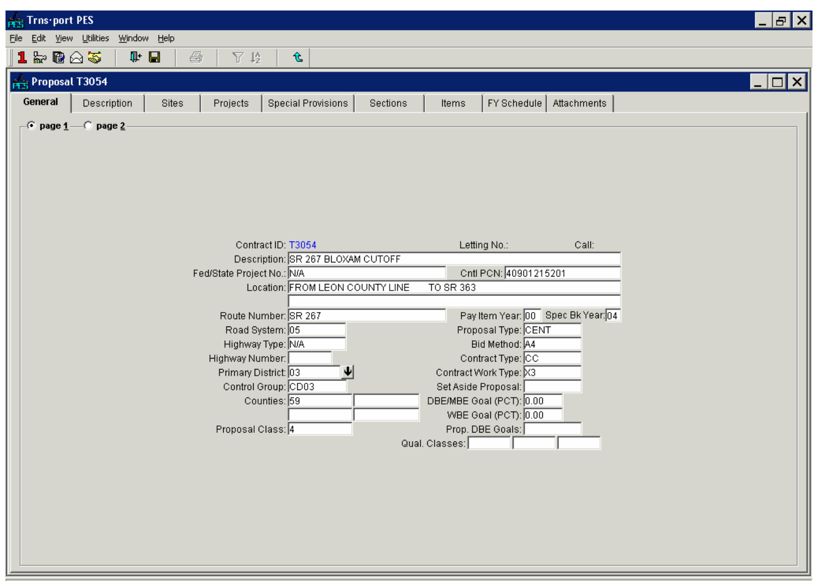
- Click **No**.

This box tells what data will be copied from the Lead Project Number. Once the information is imported, change it as necessary.



The Import Controlling PCN function, automatically attaches The project to the Proposal and it will appear in the Projects Tab.

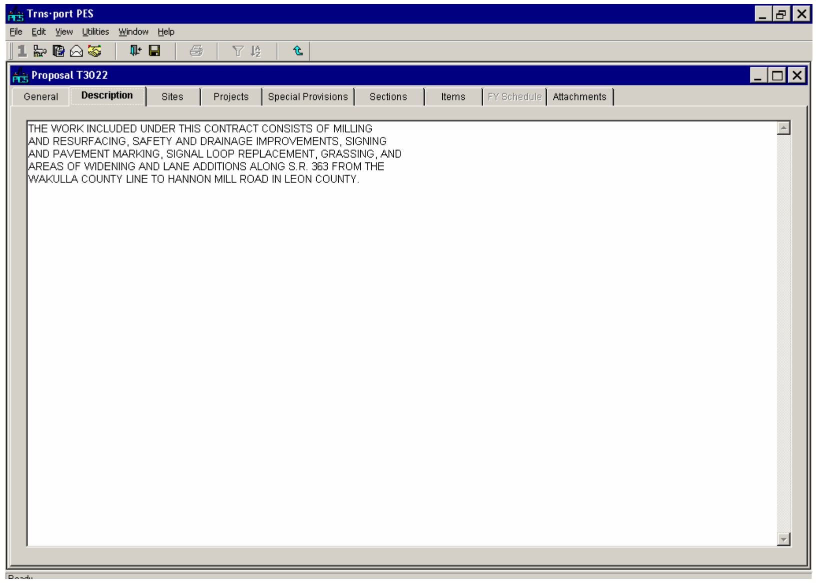
Page 1 will appear like this when all of the necessary fields have been entered.



The Description Tab

After entering the General information, move to the Description tab.

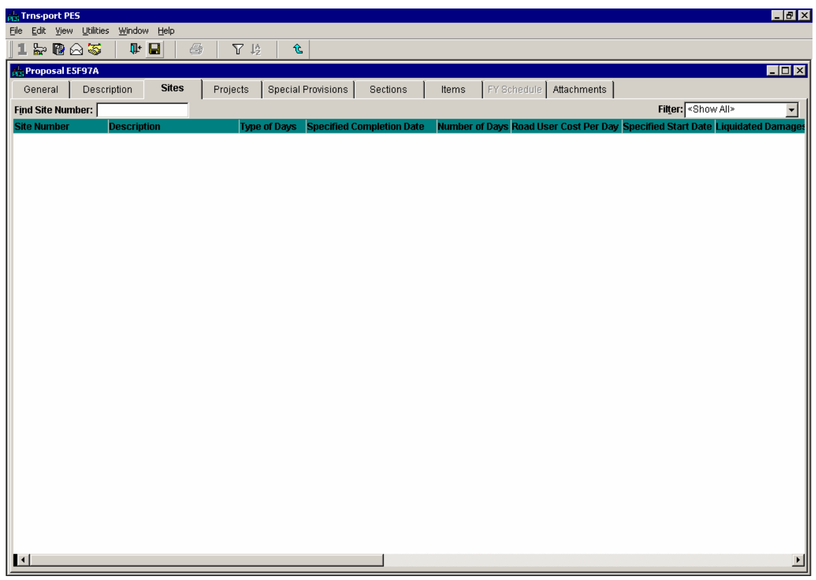
Enter as detailed a description as possible.



The Sites Tab

A Site in PES is a record that has information about the contract time or times within a Proposal. A Site record could represent various physical sections of the Project, like Structures for example. Or, a Site can be any other division of a Project.

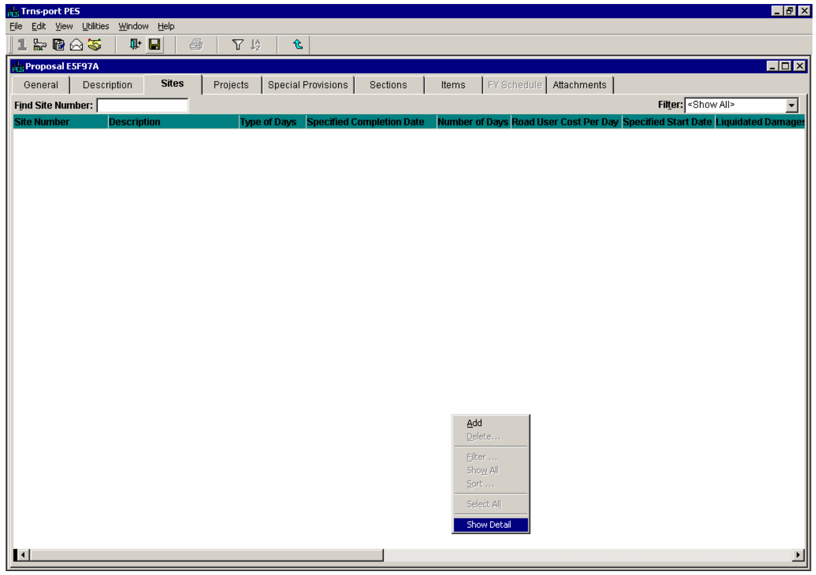
The Site 00 record. This record will contain the total contract time for the Proposal, and is required by the system. On a new proposal, the tab will be empty as seen at the right. You must add at least one row of data.



If the Sites tab looks like this,

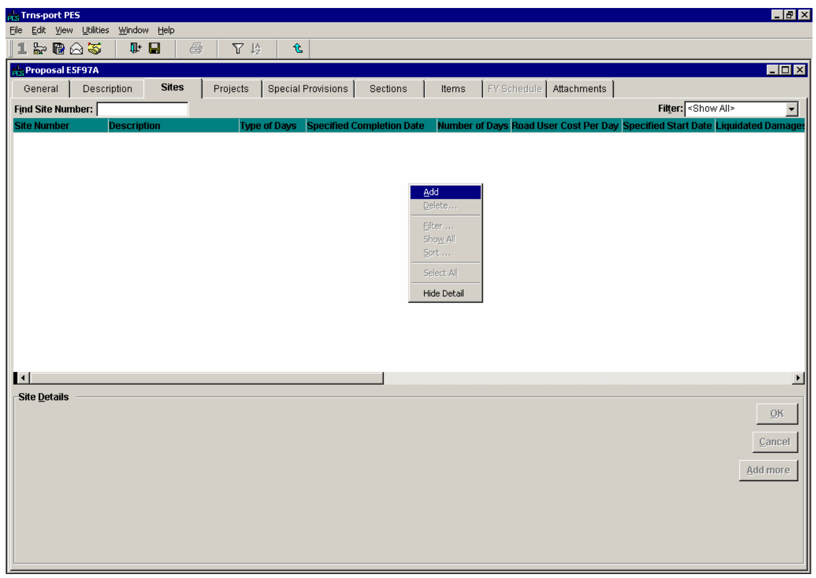
- Rclick in the white space.
- Click **Show Detail**.

This will show all the Site records in the top half of the screen and the detail for the selected record in the bottom half. Always show the detail before adding a record.



The screen will now have a white area in the center, and a lower portion in which detail will be entered.

- Rclick to see the Mouse Button Menu.
- Click **Add**



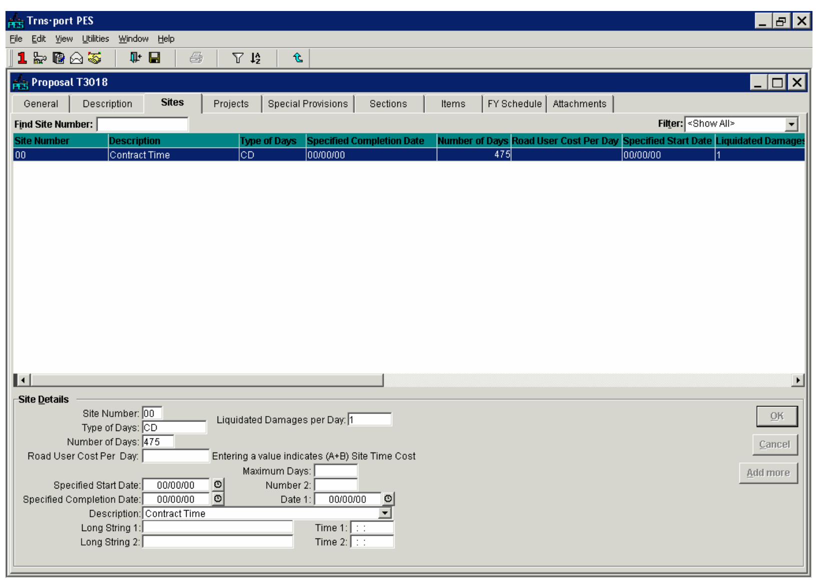
The screen is now ready for Site data. Site Number 00 has opened as the default. This is the required site to show contract time and type of days.

Required fields for the Site Tab are:

Site Number Use the default value of 00.

Type of Days Choose from the drop down menu. The usual choice will be CD from the TIMMETH code table.

Number of Days Enter the number of days planned for the work. If Type of Days is chosen to be Calendar or Working days, then a number of days must be entered. If the type of



days is Completion Date, then the Specified Completion Date must be entered and the number of days need not be entered.

Liquidated Damages per Day there is a default value of $1.00. Liquidated Damages will be handled in SiteManager. The Site 00 record information passes over to Site Manager as the Original Contract Days. Other Site records pass to Site Manager as Milestones.

Description Enter "Contract Time" from the SITEDES code table choices.

Alternative Contracts

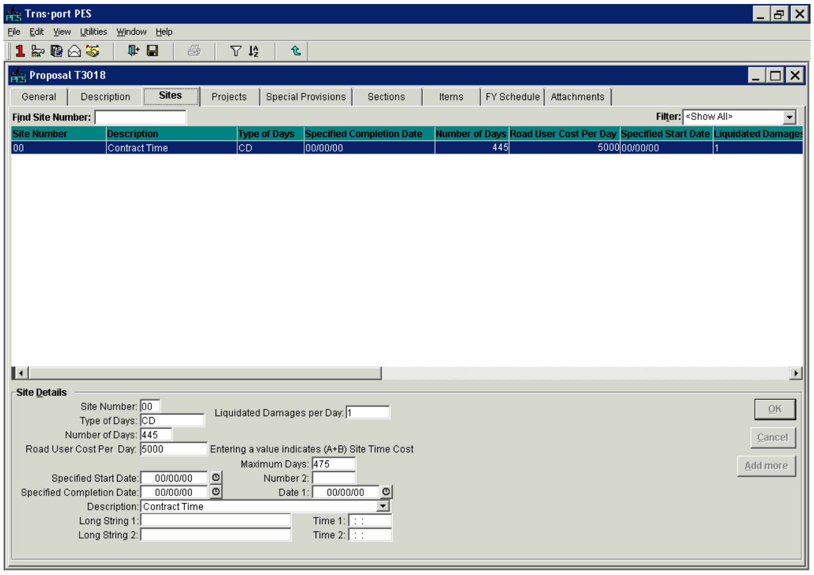
As noted above, the Site Tab information transfers to SiteManager and may be used for a variety of ends including Contract Time, Daily Rates, Incentives and Disincentives, and administrative information.

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.

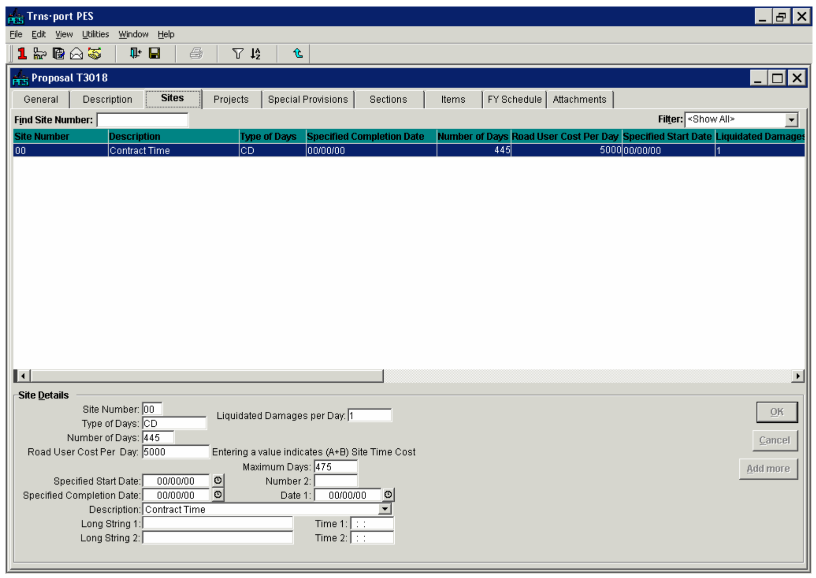
At the Sites tab enter data in the following manner.

- ***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 CD in the drop down menu from the TIMMETH code table.
- ***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

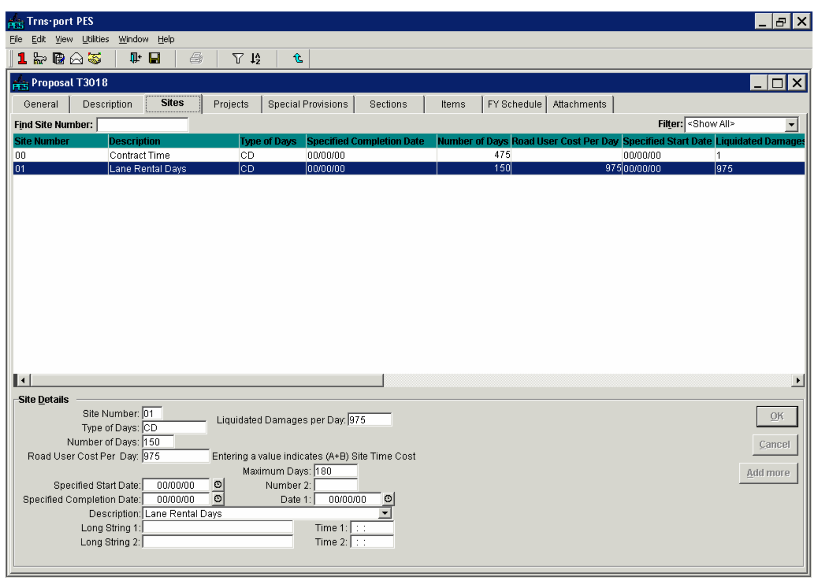


At the General tab,

- 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*

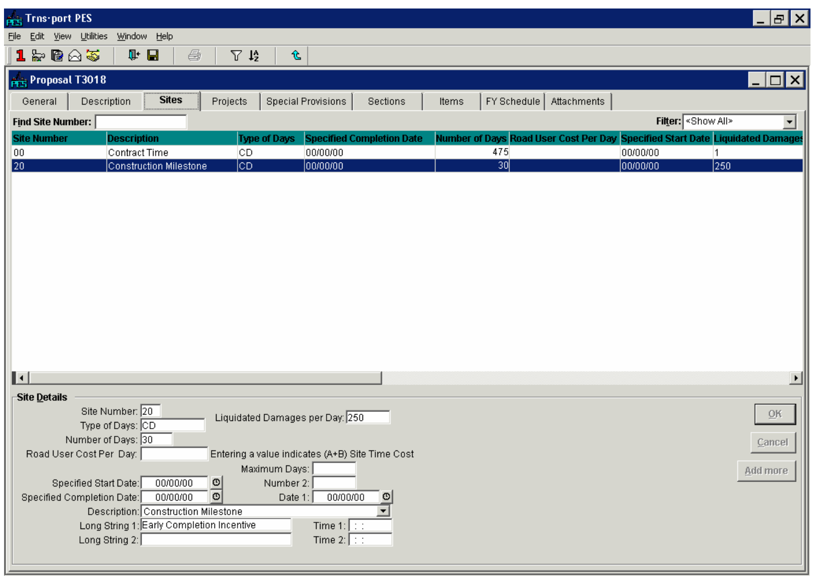
to be entered below. This field will transfer to SiteManager as a Disincentive amount.

- ***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

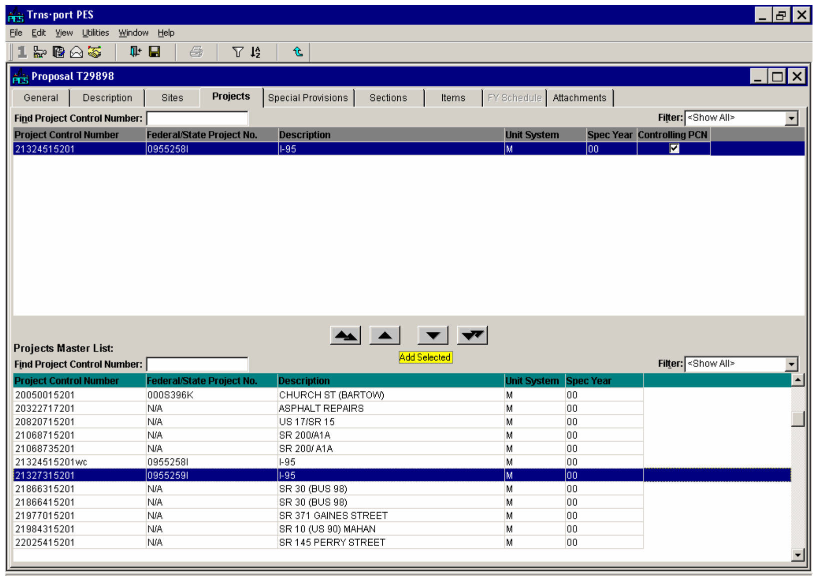
For general Construction Milestones either with or without Incentives and Disincentives, create a Site 00 for the contract time in the usual manner. Then create additional Sites as described here. Enter data on the Site Tab in the following manner.



- ***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**.**

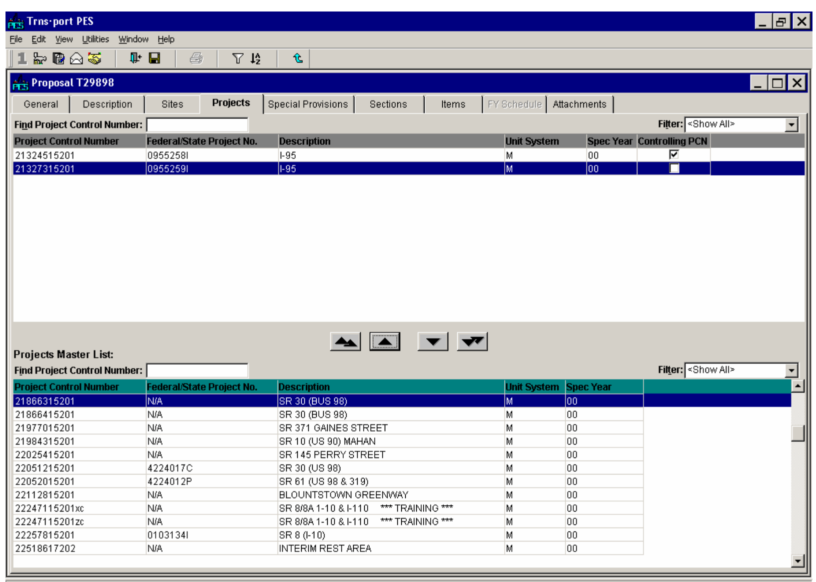
The Projects Tab



Attach the Project(s) to the Proposal. Go to the Projects Tab. If you used the Import Controlling PCN function, the ***Cntl PCN*** will be marked in the Project List in the lower window.

To assign one or more Projects to the Proposal,

- Click the **Project** or use the **<Shift>** key or the **<Ctrl>** key to select multiple Projects.
- Click the **single Up-Arrow** button.



The Projects will appear at the top of the screen and are now associated with the Proposal.

If you did not select a Controlling PCN on the General Tab, place a check mark in the ***Controlling PCN*** box .

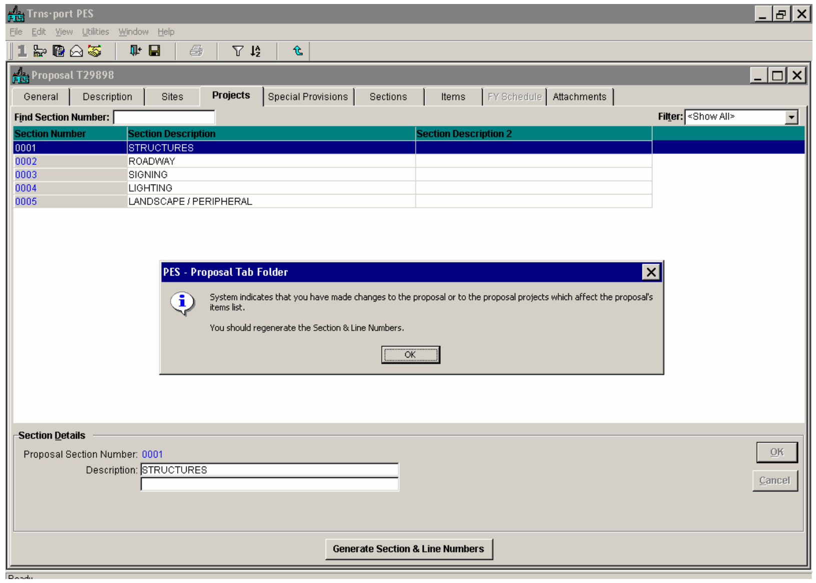
Note that all of the projects displayed in the lower panel are of the same ***Unit System*** and ***Pay Item Year***.

Warning: In the Tabbed Folder Change mode, PES has checks to block a project from being attached to more than one proposal. Projects can be attached through the Drill-Down method. **DO NOT attach projects to proposals using the Drill-Down mode of PES.**

Sections Tab

When entering the Sections tab for the first time after attaching projects to it, this message box will appear. It is saying that Section and Line numbers need to be entered for the Proposal.

This process rolls up like items and categories for the proposal.

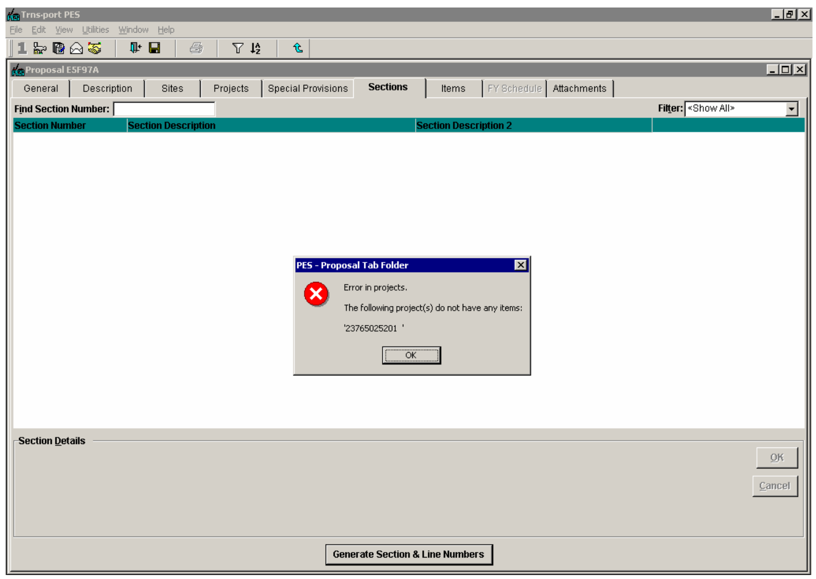


Close the information window.

- Click the **OK** button.

If the screen has a large area of white as seen previously for the Sites tab,

- Rclick to see the Mouse Button Menu.
- Click **Show Detail**.
- Click **Generate Sections & Line Numbers** button



If one of the projects or a category contains no items, you will receive a message like the one at the right.

Exit the Proposal and correct the problem in the Project, by either adding items to the Category, or deleting the Category if it is not required in the contract.

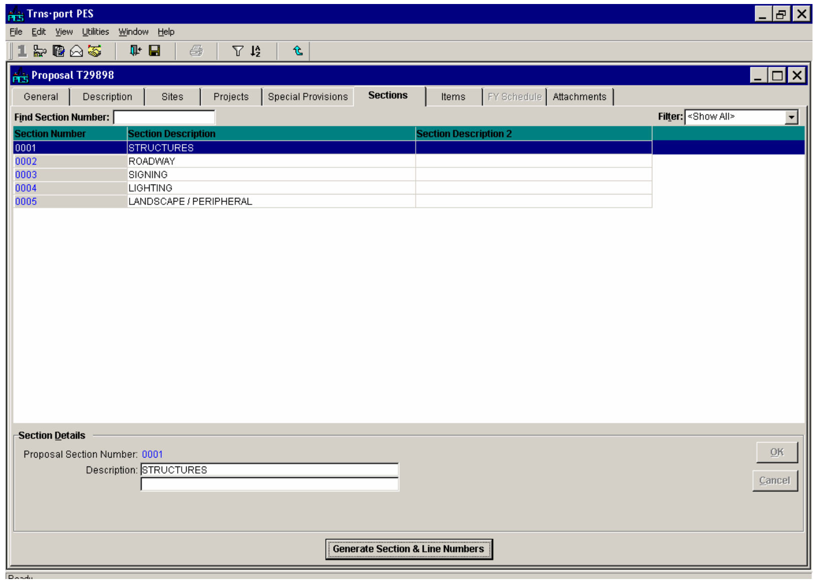
- Click **OK** on the message box,
- Click the **X** in the upper right hand corner of the Add Proposal window and save the Proposal

Return to the Proposal List window.

When adding a proposal or a project the first time using Tabbed folders, do NOT try to save the proposal or project by choosing **File >Save** from the Menu Bar, or by clicking the **Save** icon on the Tool bar.

After the project data has been corrected, and section and line numbers have been generated, the Section Tab will now appear like this with one or more sections. Review the section descriptions, and revise them as necessary. The default titles are the description of the lowest numbered Maintenance Activity for the Categories that made up that Section.

This description will print on the Proposal Schedule report that is sent to prospective bidders.



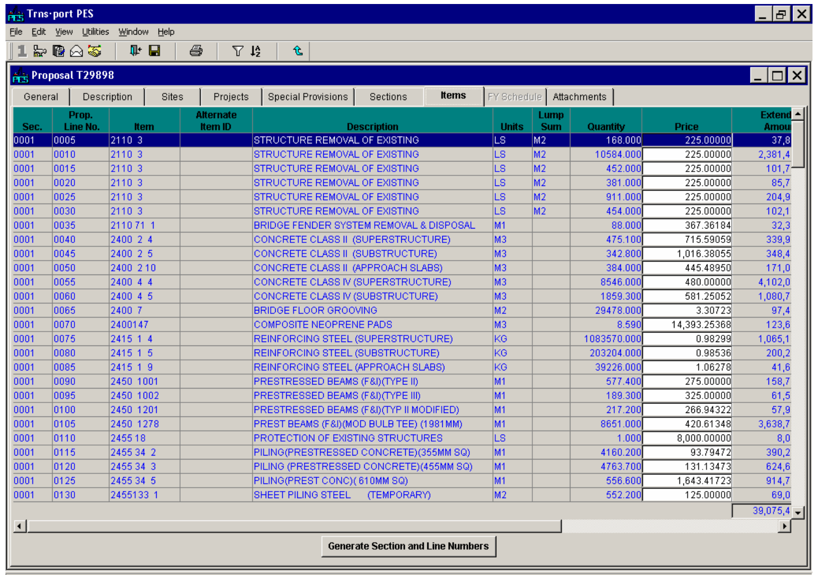
The Generate Section and Line Numbers Process

When initiating the process, Trns•port combines the project categories and project items in the following way:

- All categories whose FEDCCLS fields are the same will be combined, except when a category is an alternate.
- Items from alternate categories are combined with alternate categories in other projects only when the alternate codes for the categories in both projects are identical.
- Trns•port assigns a unique section number to each proposal section and updates the database record for every category to reflect the section to which it is assigned.
- Trns•port aggregates items within combined categories (proposal sections) when the items have the same Item Number and Proposal Supplemental Description. The exception to this is that lump sum items are not automatically flagged to combine.
- Trns•port removes items that are members of an alternate Item set from the section and places them in a section describing the alternate relationship.
- Trns•port combines alternate items across projects only when identical alternate codes are used in both projects.
- If an Item has been marked to not combine, Trns•port will not combine it.

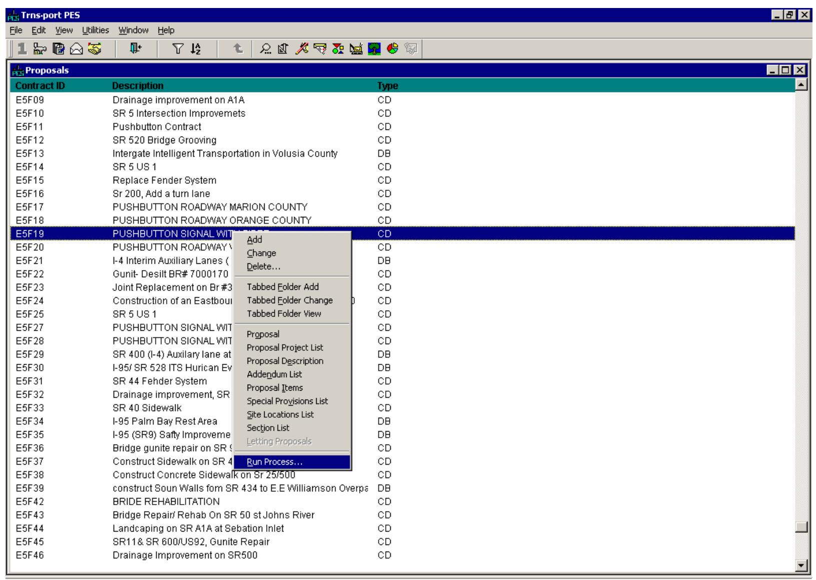
The process of generating section and line numbers will roll up the project-level items and categories to the proposal level and assign proposal line numbers and section numbers to the items and categories. Trns•port uses the section and line numbers assigned through this batch process to generate the proposal items in the Trns•port LAS initialization process. All proposal-level reports will use these line number assignments.

The Proposal Items Tab



The **Items** Tab will look like this one.

When a proposal has been set up, estimators will want to review the proposal-level prices and quantities. Estimated prices may change because of quantity changes or because the price might have changed over time. View and modify the estimated prices through the Proposal Worksheet.



The Items tab shows a worksheet similar to the one at the project level. This worksheet shows quantities rolled up to the proposal level. If Item price estimates were previously specified (with the Generate Bid-Based Prices process or by the estimator), a weighted estimated price for each proposal line Item will be displayed. This pricing information is computed from the estimated price and quantities of the individual occurrences of the items that were combined into that proposal line Item.

Change the estimated price in the Price field as necessary. However, no other information may be changed in this worksheet. If quantities are to be changed, they must be changed in the proper project. If you change a price inadvertently, press **ESC** before you leave that field so that it will revert to the original price. Trns•port recalculates the extended amount according to the new price you enter. When you finish making changes, click the window again.

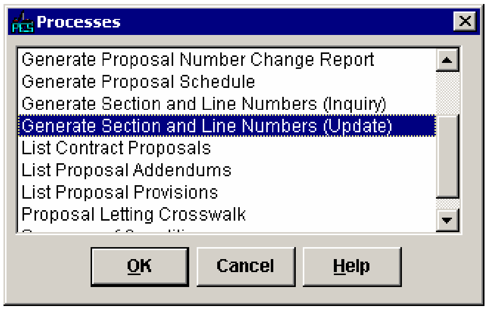
When you close the window, Trns•port displays a dialog box.

- Click **YES** to save the new prices,
- Click **NO** to return to the Proposals List window without changing prices, or
- Click **CANCEL** to return to the Proposal Items tab window to make other changes.

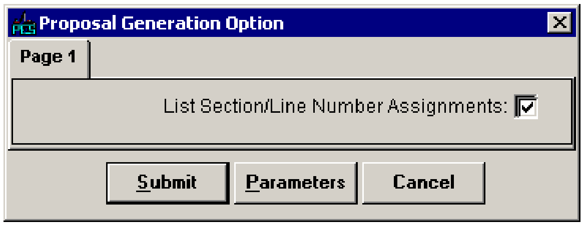
When you save, Trns•port will send the new prices back to the project level. Each proposal line price estimate will be redistributed to each of the project Item records that combine into that proposal line Item.

In the past, there have been instances where the sections and line numbers did not roll up items properly. There is a process called Generate Section and Line Numbers that can be run for the Proposal List window that will assign the numbers correctly.

To run the Generate Section and Line No's process, from the Proposal List Window,



- Rclick to see the Mouse Button Menu.
- Click **Run Process**.
- Click **Generate Section and Line Numbers (Update)** from the Process window.
- Click **OK**.
- Leave the List Section/Line Number Assignments box checked.
- Click **Submit**.
- Acknowledge the two informational windows that will follow.



After the process is done, the sections will have been created and the items that are to combine will show up as one line.

- Return to the Items tab in the Proposal.
- Click the **Generate Section & Line Numbers** button at the bottom of the window

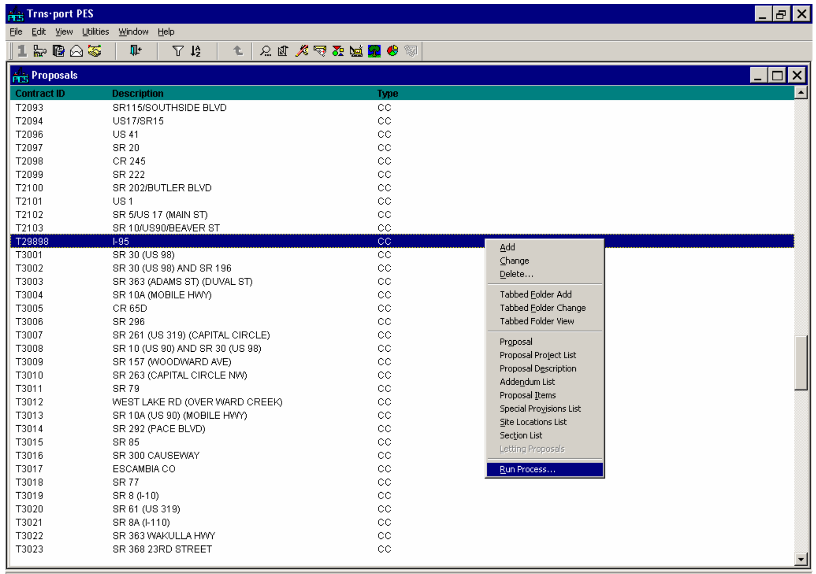
This will load these tabs but will not change the section and line numbers that were generated by the process.

Proposal Level Reports

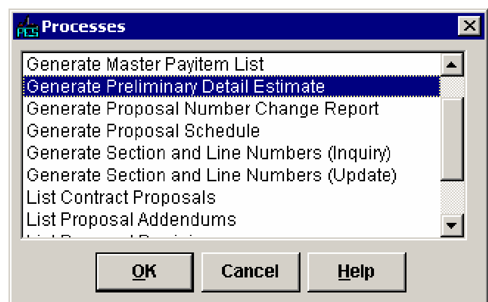
Generating a Preliminary Detail Estimate

To run a Preliminary Detailed Estimate at the Proposal Level

- Rclick to see the Mouse Button Menu.
- Click **Run Process**

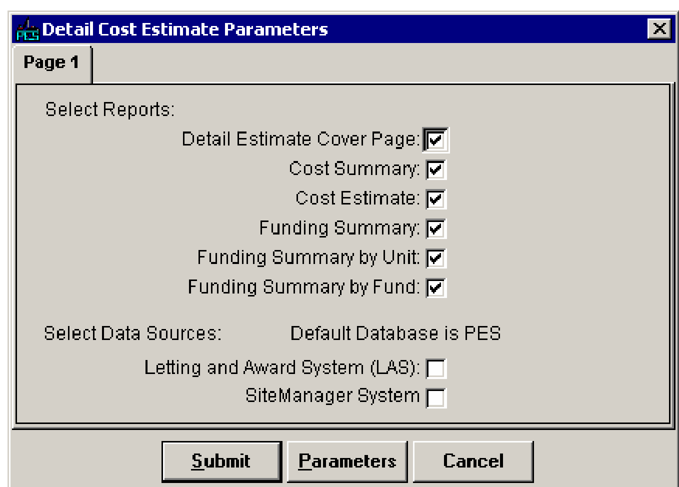


- Click **Generate Preliminary Detail Estimate**.



A window opens to choose which parts of the report are needed.

- Uncheck boxes that are not needed.
- Click **Submit**.

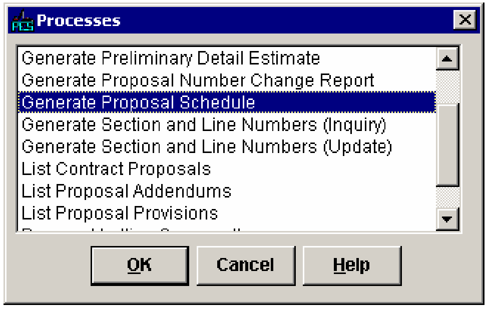


Generating the Proposal Schedule Report

The Estimator will have the capability of generating the Proposal Schedule Report (bid blanks). This should be done to verify that all of the items and sections rolled up as desired and that non-bid and fixed price items were appropriately marked. In addition, it is possible that the Estimator will want the change the estimated unit price for an item after they see the rolled up quantity.

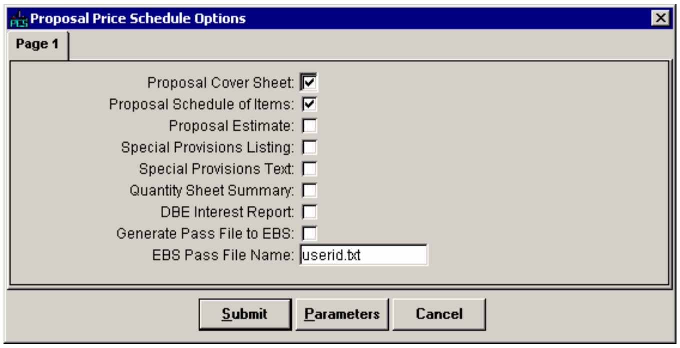
To run the Proposal Schedule Report,

- Rclick to see the Mouse Button Menu.
- Click **Run Process**
- Click **Generate Proposal Schedule**.



A window opens to choose which parts of the report are needed.

- Uncheck boxes that are not needed.
- Click **Submit**.



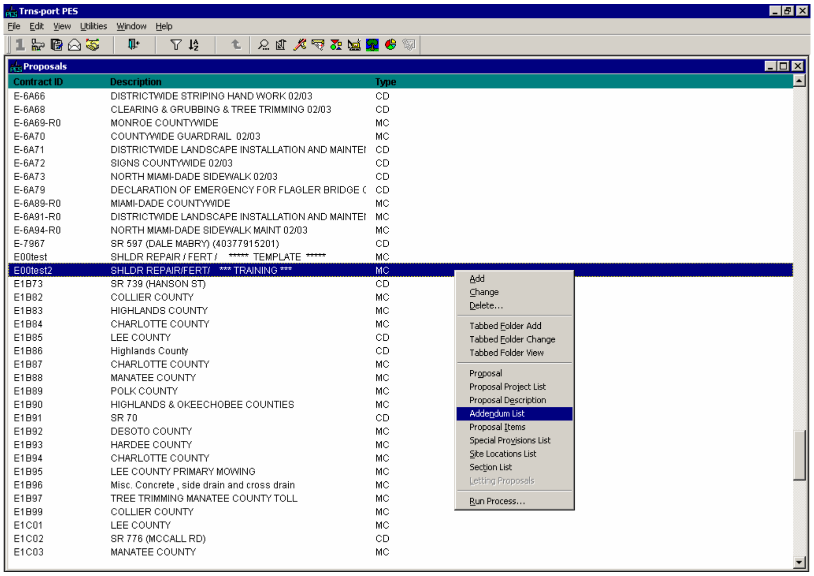
Creating Addenda in PES

Once a Proposal has been advertised, then all future changes made to the project/proposal scope must be made through an Addendum.

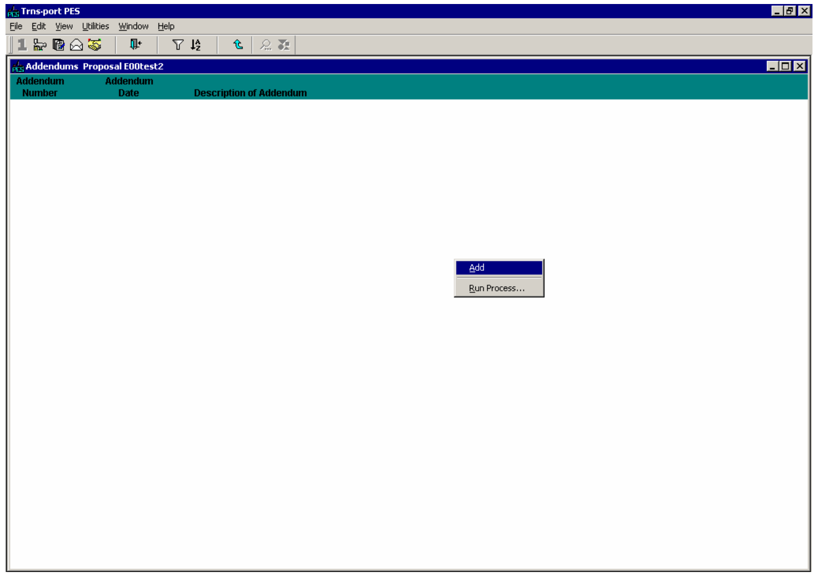
Remember that it is very important to accurately assign Project Line Numbers and Proposal Line Numbers to each Addendum Item to be added. You will need copies of the proposal level Preliminary Detailed Estimate, the Proposal Schedule, and the Generate Section and Line Numbers (Inquiry) reports to do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

Create an Addendum, from the Proposal List window.

- Click the proposal
- Rclick to see the Mouse Button Menu.
- Click **Addendum List**.



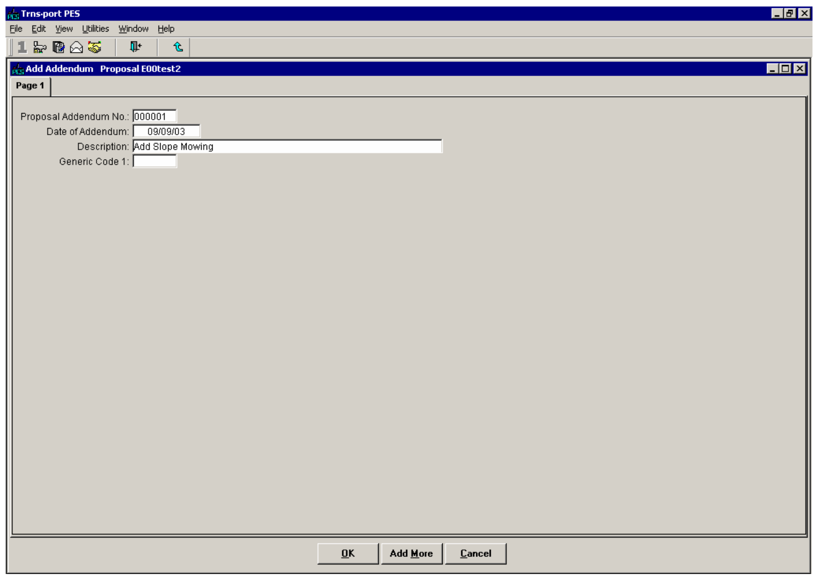
A window listing all addenda for the proposal will open. First create an Addendum Header and then add Addendum items.



To create an Addendum Header

- Rclick anywhere in the white space to see the Mouse Button Menu.
- Click **Add**.

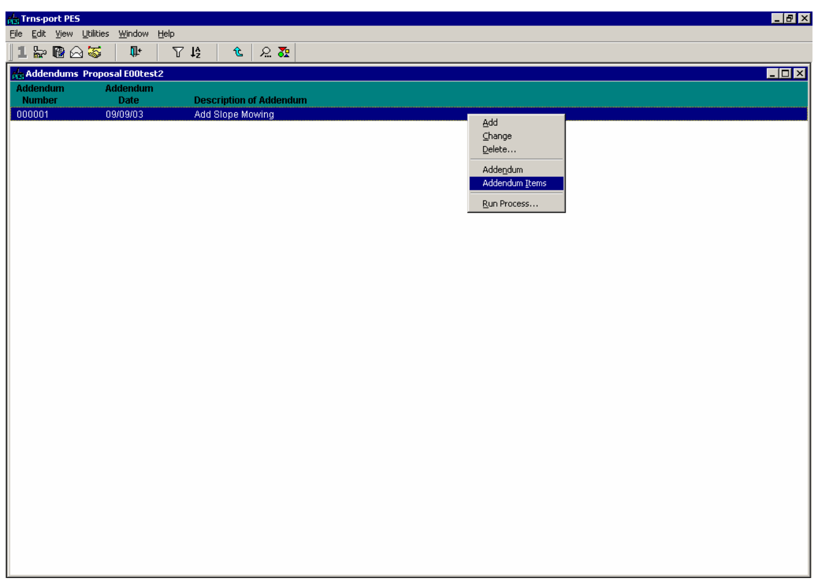
The Addendum Number is automatically assigned, commencing with 0001.



- Enter the Date of the Addendum in **MM/DD/YY** format.
- Enter a Description up to 60 characters in length.
- Click **OK** when done.

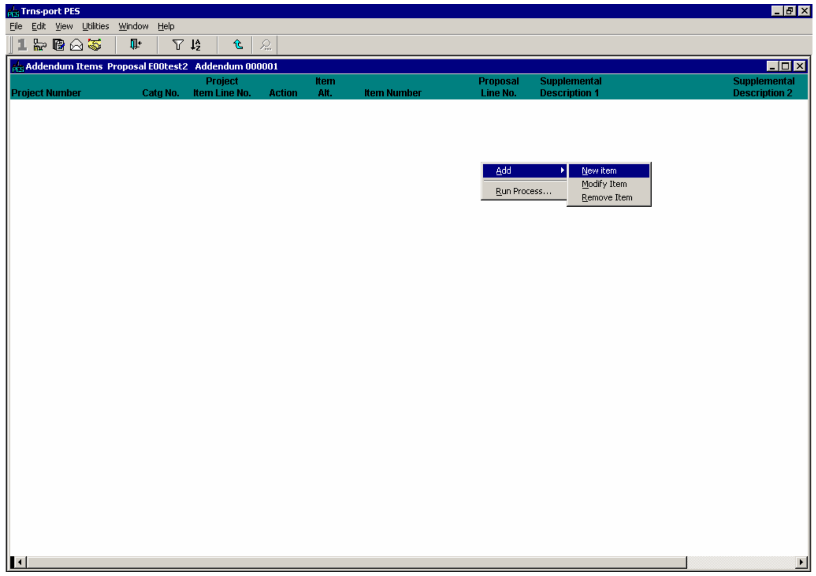
Adding New items

To add the Addendum items,



- Rclick the Addendum row to see the Mouse Button Menu.
- Click **Addendum Items**.

- Rclick in the white space to see the Mouse Button Menu.
- Click **Add.**
- Click **New Item** to add an item to the proposal.

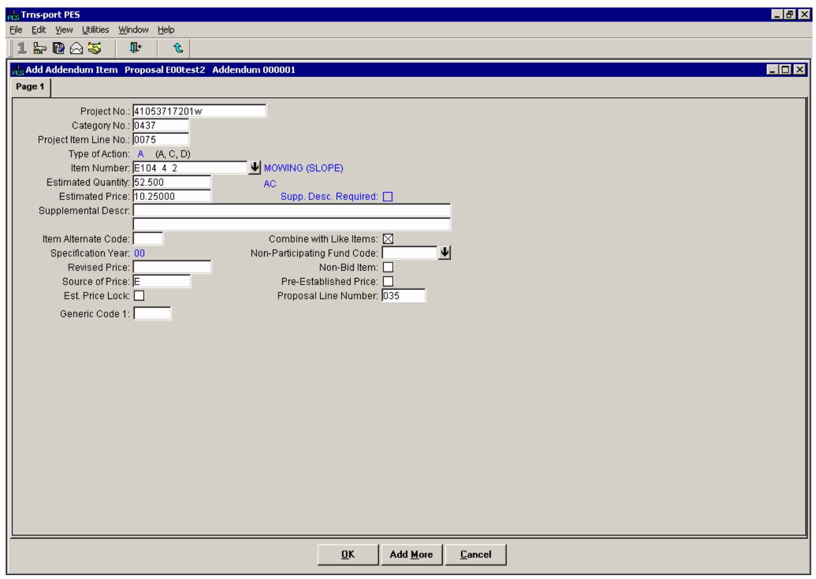


Other choices are:

Add>Modify item
Add>Remove item

In this example we will add an item.

On this screen enter in sequence:



- Project No., by selecting from the down arrow.
- Category Number by selecting from the down arrow.
- Project item Line No. that **does not already exist**.

Recall that Project Item Line Numbers are initially generated in steps of five. These gaps allow the insertion of addendum items in their logical order. Examine the project worksheet or a copy of the Preliminary Detailed Estimate and select an appropriate line number.

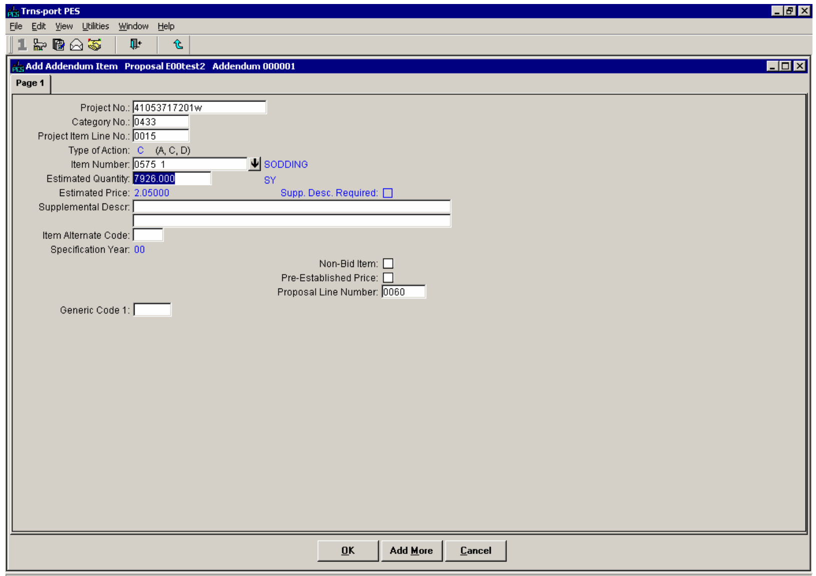
- A Pay Item Number from the drop down arrow, which opens the Master Pay item file.
- The Quantity for the added item.
- Proposal Line Number. Examine a copy of the Proposal Schedule and determine where the item should be displayed, and enter an appropriate number.

When these steps are completed,

- Click **OK** if there is only one item to Add or
- Click **Add More** if other items are to be added.

Modify Existing Items.

If the addendum is to modify one or more item, choose **Add>Modify Item** above.

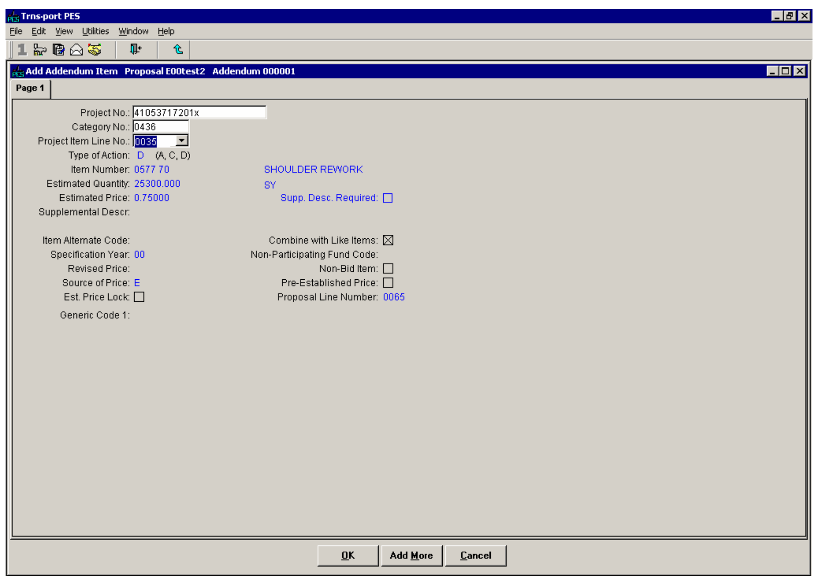


In this widow:

- Click the **Project Number** from the down arrow.
- 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, choose **Add>Remove Item** above.



In this window in sequence Click:

- Project Number from the down arrow
- Category Number from the down arrow
- Project item Line Number from the down arrow.

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

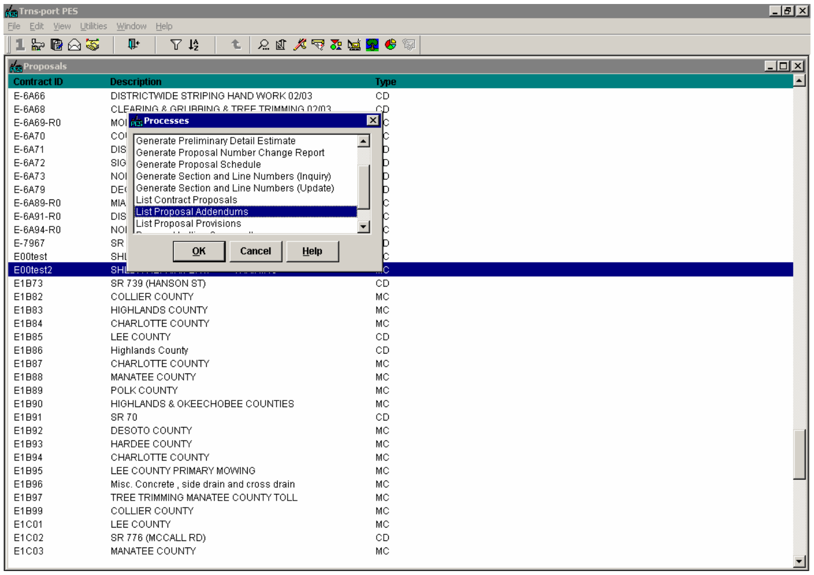
Addendum items WILL NOT show in the Items Tab in the Proposal Folder. The Addendum items WILL show on the Proposal Schedule Report.

Generating the Proposal Addendum Report

To produce the Proposal Addendum report:

- Click the **Proposal** from the Proposal List window.
- Rclick to see the Mouse Button Menu.
- Click **Run Process**
- Click **List Proposal Addendum**s
- Click **OK**.

Submit the process.



If any changes to a Project or Proposal are made after it has been initialized in LAS, the Proposal will need to be re-initialized in LAS.

Sending the Proposal to LAS

When it is time to send the Proposal to Contract Administration for Letting the Control Group on the Proposal and the Projects should be changed to be the Contract Administrators Control Group and the Estimator should notify the Contracts Office so they can initialize the Proposal in LAS and attach it to a Letting. Once the Control Groups are changed, the Estimator will no longer be able to access that Proposal or its Projects. If Addenda need to be added to the Proposal, the Contracts Administrator will need to change the Control Group on the Proposal back to the Estimator's Control Group.

Running the Bid Tab Analysis Report in LAS

Because of the confidentiality of the Estimate, it may be the Estimators responsibility to run the Bid Tab Analysis report in LAS.

To start LAS,

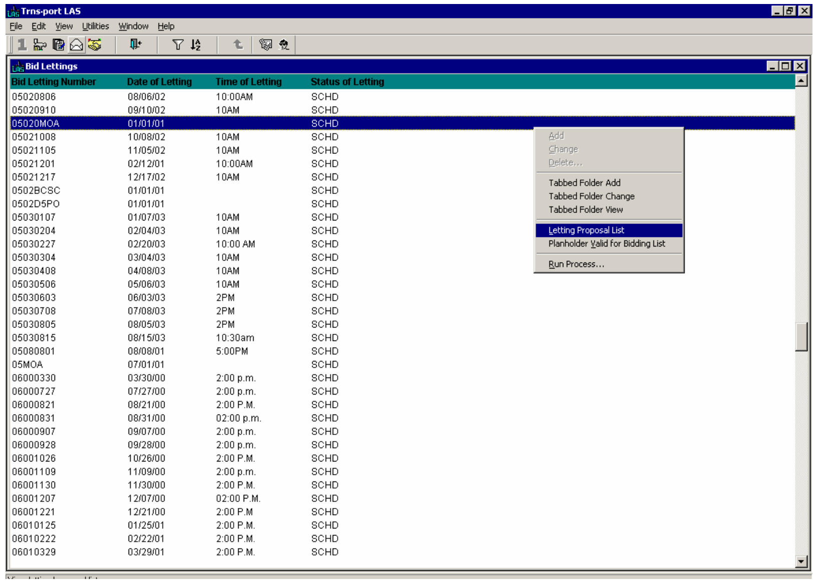
- DblClick the **LAS** Icon on the Citrix Screen.
- Enter the PES/LAS UserID and password.
- Click **OK**.

LAS will open in much the same manner as PES.

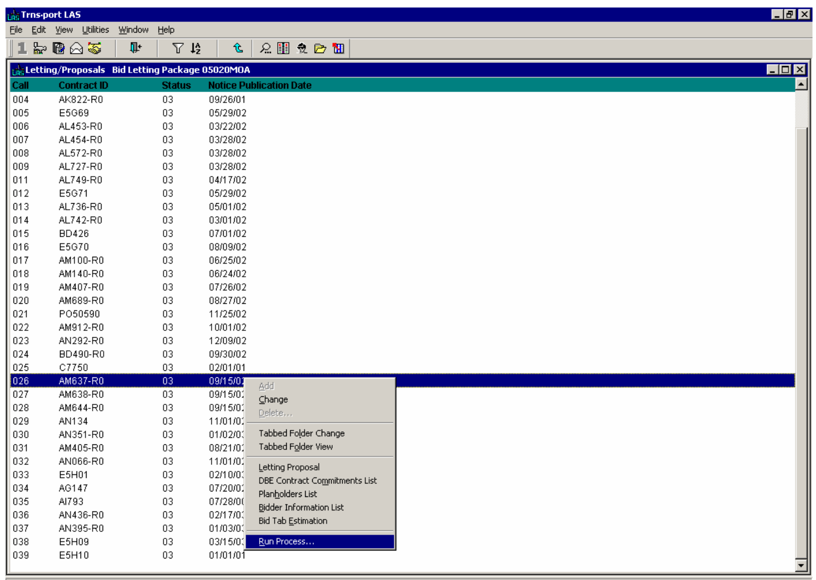
Open the Bid Letting list window by clicking on the button that looks like an envelope. 

Then

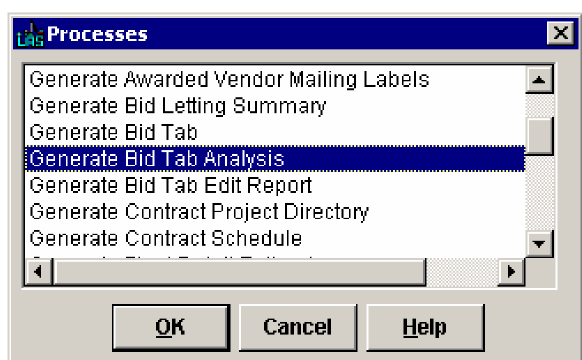
- Rclick the desired Letting to see the Mouse Button Menu.
- Click **Letting Proposal List**.



The Letting Proposal list window will open.



- Rclick the desired Letting Proposal to see the Mouse Button Menu.
- Click **Run Process.**

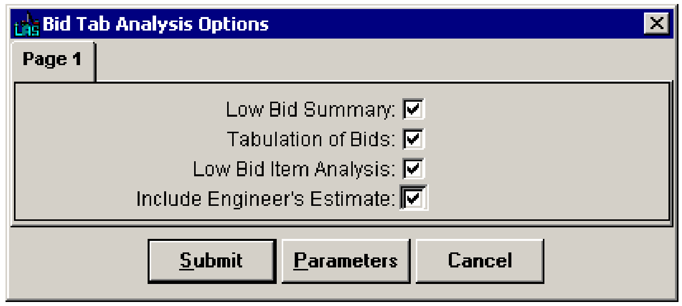


- Click **Generate Bid Tab Analysis.**
- Click **OK**.

For the first run, select all reports including the Engineer's Estimate.

This set of reports will show the Engineer's Estimate on the reports in comparison to the bidders' prices.

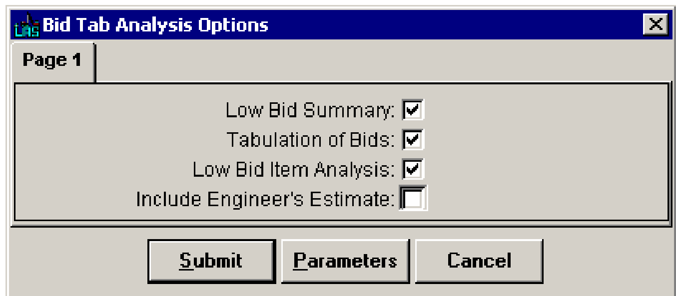
- Click **Submit**.



The second time you run the reports, do not check Include Engineer's Estimate.

This second set of reports will be given to the Contracts Administration Office.

- Click **Submit**.



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 the Letting process 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 the case may be, 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 re-advertisement.

District Estimator

- From the Proposals List window, highlight the proposal to be modified.
- From the right mouse button menu, select **Tabbed Folder Change**.
- Go to the Projects tab and select 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 appears:
    - 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** on 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.

Appendix A Glossary

AASHTO American Association of State Highway and Transportation Officials.

Ability Factor The numerical rating of the vendor's capability to perform work. It is a factor in calculating the vendor's capacity; it is not a performance evaluation. See also Adjusted Net Worth and Capacity.

Access Control Group Each user and each project and contract can be assigned a Trns•port control group code. A given user only has access to those projects and contracts that have the same control group as the user. (See Control Group)

Account Number The account number of the contractor who is setting up a securities account. This number could be the same as the contractor's vendor number (as maintained in the Vendor file) or the Contract ID number, depending on the Trns•port installation setting.

Accounting Fund Code The accounting department's code for a fund when it differs from the Trns•port code.

Accounting Project Number A code the Accounting department can enter for projects.

Acquis. Time Available to indicate to bidders that acquisition time is available to procure long lead-time items such as mast arms or other items needing to be fabricated.

Action The type of action (add, change or delete) to be performed by an addendum item.

Active Project The open or highlighted project (of possibly many) that commands will affect.

Active Window The open window (of possibly many) that commands will affect.

Addendum After sending proposals to planholders, handle subsequent changes through modifications called addenda. Addenda allow modifications directly into the system to apply changes to the proposal information before the bid letting. Send a copy of each addendum to planholders as soon as possible so planholders can incorporate the changes in their bids.

Addendum Date The date the addendum is added or becomes effective.

Addendum Description A short description of the proposal addendum.

Addendum Number The sequential number identifying a proposal addendum.

Addendum Project Item Line No. A unique sequential identifier for an item within a project. Choose a value from the attached drop down list. When you select a category number, Trns•port fills in the Project item Line Number list with all Project item line numbers for the selected project and category.

Additional Vendor Name A field for an additional name of the vendor.

Add-On An adjustment to the pay items of a contract after the award is made. This adjustment is something other than a formal supplemental agreement.

Address Sequence Number A sequential number used to identify one of multiple addresses for a single vendor.

Address The address of the district, area office, field office, or residency.

Address Type A coded value indicating the type of address for the vendor (for example, billing or shipping) when a vendor has multiple addresses.

Adjusted Net Worth The total value of the vendor's assets minus the total value of its debts. This number can represent the agency's estimate, the vendor's claim, or an audit amount.

Adjustment Code Not in use by the Department at this time. A coded value (which must be in the ECTGPCT code table) indicating the percent to be used for any additional adjustments. The adjustment fields act like E&C percent (for example, gross receipts tax percentage).

Adjustment Item Changes to a construction contract item after award, which can include incentives, disincentives, and liquidated damages.

Adjustment Percent Not in use by the Department at this time. A percent adjustment made to the category, which is applied to the total category construction cost to compute the total category amount.

Adjustment Type Code A coded value (from the ADJTYP code table) indicating the kind of price adjustment being applied to the item.

Advance Account If your state allows contractors to set up accounts for contractors, this field holds that number. It is not used for any Trns•port processing.

Advance Account Number If the state allows contractors to set up accounts for contractors, this field holds that number. It is not used for any Trns•port processing.

Affiliate Vendor Number The name of the vendor associated with another vendor. All references to vendors are validated with the Vendor file.

Affiliates Two Vendors that are legally related to one another in an ongoing way. The Affiliates can be parent and subsidiary, or substantial owners of each other's stock. Two Vendors who engage in a single joint venture are not considered Affiliates.

Agency A specific agency that provides funding for a specified purpose (for example, bridge rehabilitation).

Alternate Item Number ID Not in use by the Department at this time. A separate item code used in public documents or in communication with other systems if the regular item number is inappropriate. For example, the regular item code might be too specific for public documents.

Alternate Project ID Not in use by the Department at this time. A code that identifies a project in some electronic or manual system outside of Trns•port. Trns•port can use this value to communicate with that external system.

Alternate Vendor ID A code that identifies a vendor in some electronic or manual system outside of Trns•port. This value can be used by Trns•port to communicate with that external system.

Alternate Vendor Number An alternate identification number or code for a vendor.

Amendment Another name for an addendum.

Amount Due to Date The total amount presently due for payment to the contractor for a given project.

Amount Encumbered The dollar value of securities being withheld by the state to cover retainage requirements to date for a contract or vendor (see Securities Account for a description of the agency's options). This is the amount withheld from payments if there is no securities account or if the securities account had insufficient funds. The total of all Amount Encumbered values for a particular securities account is limited by the current value of securities on deposit in the account.

Amount Further Subbed (Actual) The dollar value of all child or "sub-subcontracts" of a subcontract, which is based on the actual amount agreed to by the subcontractor with the sub-subcontractors. Because the actual agreements between subcontractors and their sub subcontractors might not be known to the agency, this value might not be meaningful.

Amount Further Subbed (Contract) The dollar value of all child or "sub-subcontracts" of a subcontract, which is based on the contract prices for all items.

Amount The amount of the transaction.

Approval Date The date the vendor was approved for work.

Approval Flag A notation indicating the acceptability of the vendor to work on the contract.

Approximate Percent of Project Length The percentage of the project (measured in physical length or size, duration, dollars, or other characteristic of choice) that occurs in the indicated county, city, or congressional district. This value is used to estimate the value of projects in selected geographical areas.

Area A portion of the state that consists of one or more counties in their entirety. Each Area belongs to exactly one Area Type.

Area Type A specification for partitioning the state into Areas. The Areas in an Area Type must be disjoint (have no overlap) and, when combined, must include every part of the state. Different Area Types partition the state in different ways for different reasons; for example, Area Type "Steel" might partition the state by variations in steel prices while Area Type "Asphalt" would be a different partition by variations in asphalt prices.

Ascending List order such that the first character of each successive list element has a symbol that occurs later in the alphabet or number system than the preceding element. The list of numbers 10, 20, 40 and the list of codes A25, C11, Z44 are in ascending order (see Descending).

Authorization An official authorization approval of a recommendation.

Authorized Payment Limit The maximum amount that can be paid to a contractor for a given project.

Automatic Payment (Auto-Pay) Item Items, such as mobilization, with set schedules for voucher payment as determined by the basis of work on a contract.

Automatic Payment Specification The rules governing the rate of payment of Auto-Pay Items. Typically of the form "When the contract reaches X% complete, pay Y% of the item."

Automatic Section Assignment Flag This field tells Trns•port to assign project categories to proposal sections automatically or do it manually by entering section numbers in the category records. The default value is Y, which means Trns•port will automatically assign categories to sections.

Auto-Pay Item See Automatic Payment Item.

Average Pavement Depth The average depth of the pavement in the roadway portion of the proposal.

Average Pavement Width The average width of the pavement in the roadway portion of the proposal.

Average Price The weighted average unit price bid for a particular item. The item bids analyzed will usually be grouped according to similar proposal or proposal item characteristics.

Average Unit Price (AUP) Work Type Used to determine average unit prices. One of nine work types related to a specific project. Trns•port uses this field to help generate bid-based prices for the project items.

Award Contract Amount The dollar amount originally awarded for a contract.

Award Date The date a contract was actually awarded to a contractor.

Award The contracting authority's acceptance of a bid subject to the execution and approval of the contract.

Awarded Amount The dollar amount awarded to the winning bidder for a proposal.

Awarded Vendor Number The vendor number of the winning bidder for a contract.

Batch A computer process that runs by itself with no user interaction.

Beginning Termini Defines more precisely where the project is taking place with notation defined by your agency. This data, which is printed on some reports, is passed to Trns•port BAMS/DSS to pinpoint the project on maps.

Bid A sealed written instrument conveyed to the Department by a bidder that details the bidder's offer to handle the construction work outlined in a proposal for a price included in the bid.

Bid Alternate A portion of a proposal that contains two or more groups of items for which the bidder must bid on at least one of the group.

Bid Bond A dollar amount required to bond contractors. This field is printed on some Trns•port reports but not otherwise used in any processing. The default value is "0". **Do not change it**.

Bid Edit Status Indicates if the automated bid editing process detected any errors in the bid (such as incorrect arithmetic).

Bid Letting An event at which a Department staff person opens and reads all bids for specific proposals, determines the winning bidders, and awards contracts.

Bid Letting Control Number The value Trns•port uses to uniquely distinguish the bid letting. It does not need to relate to other Trns•port data values in any way.

Bid Letting Package A group of proposals processed in a single bid letting. After you define proposals, assign them to a bid letting package.

Bid Note A description field to store textual notes (brief written comments) about a particular bid for a letting.

Bid Note Sequence Number A sequential number Trns•port generates whenever you add notes about a bidder.

Bid-Based Prices Unit prices for work items that are derived from estimated historical bid prices. This process uses either regression or weighted averages that are based on data generated by the Trns•port BAMS/DSS PEMETH model.

Bidder A vendor who submits a bid on a proposal.

Bill-to Address Number The sequence number of the planholder's billing address. Trns•port references the address information in the VENDADDR file.

Bi-Weekly Estimate The estimate the engineer generates every two weeks for a particular project.

Break Item Quantity The recorded quantity of a work item at the plansheet level. These quantities will be rolled up to the estimate item level.

Break Item The portion of a regular/structure/sewer item assigned to a particular plansheet.

Breakdown A detailed description or graphic of a section of work performed in the project. It can contain sketches, items, and quantities.

Breakdown ID A unique identifier for the breakdown within a project. If the default value of "1" does not appear, enter a value of "1".

Breakdown Item Line Number The line number identifying the breakdown item. This is usually a number sequenced for the items within a single breakdown. This number is differentiated from the Project Item Line Number, which may include more than one Breakdown Item Line Number. This field can be entered automatically. See “Assigning Line Numbers".

Breakdown Item Quantity Enter the quantity for the Item.

Breakdown Type A code table indicating the plansheet might be of a certain type or contain certain data (for example, roadway, bridge, structure or sewer).

Bridge ID A unique identifier for a bridge structure.

Bridge Length The length of a bridge.

Bridge Type A value selected from the attached BRDGTYP code table that indicates the type of bridge (e.g., Overpass, Trestle Low, etc.).

Bridge Width The width of a bridge structure.

Calculated Bid Total Trns•port calculates the vendor bid total by checking various figures on the vendor's bid tabulations. Trns•port calculates and sums item extended amounts or sums vendor section totals according to an installation option. This figure should be the same as the Proposal Bid Total.

Call During a bid letting, the person in charge of the letting calls each proposal in a pre-specified order so bidders can submit their bids. For bid lettings, the terms call and proposal are often used interchangeably. Trns•port identifies each call by a three-digit number. Many reports in Trns•port LAS list proposals in call order.

CAS Contract ID The label used to identify proposals to be combined into one contract.

Cash/Charge Code A coded value (which must appear in the CHRG code table) indicating the method by which the plans were purchased.

Category A subdivision or grouping of items within a project. Each category represents a collection of related work items that have the same agencies with the same participation. Each category can have one or more funding sources (funds). Associate each category with a particular unit of work in the project; that is, group all items for a single structure into a single category. Each category should contain items belonging to the same class of work and E&C percentage. Use categories to group items by alternate design possibilities.

Category Adjustment Code A coded value (which must be in the ECTGPCT code table) indicating the code for a percent to be used for any additional adjustments. The adjustment fields act like E&C percent (for example, gross receipts tax percentage).

Category Adjustment Code A coded value (which must be in the ECTGPCT code table)

Category Adjustment Percent A percent adjustment Trns•port will make to the category. Trns•port applies this percent to the total category construction cost to compute the total category amount.

Category Alternate Code Different categories can be alternates for each other, which means that a bidder can choose to bid on either category but not both. The code you enter here indicates that this is an alternate category. The first two characters specify the alternate group and the third character specifies the alternate number. The Category Alternate Code field and the Federal Construction Class field control the generation of section numbers for the proposal. If categories have the same Federal Construction Class and Category Alternate Code, they will be combined into a single section.

Category Depth The average pavement depth in inches/cm.

Category Description A short description of a category's purpose (e.g., funding agencies) used as default label for proposal section description. Required by the system; should contain the code description that is found with the Category Work Class field for the Maintenance Activity Number chosen. Enter the description from the Category Work Class description.

Category Length The length of the category in miles or kilometers. This quantity will be printed on some reports as an overall project 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 in miles or kilometers. The default value is 0.0000.

Category Number A four digit number Trns*port uses to identify the category. Enter the Category Number from the list box. A range may be entered all at once.

Category Width The width of the portion of the project represented by a given category. The default value is 0.0000.

Category Work Class A value selected from the attached CWRKCLS code table that indicates the kind of work performed in a category. For Maintenance projects, use the appropriate Maintenance Activity Number in the list box.

Catg. Suppl Work Code Similar to the Federal Work Category except that Trns•port uses the FEDSUPP code table. A coded value indicating the type of federal work performed in a category.

Change Order A written order issued by the engineer to the contractor**.** It covers permissible adjustments and minor plan changes or corrections, rulings with respect to omissions, and discrepancies or intent of the plans and specifications. It does not include any extra work or other alterations covered by the supplemental agreement.

Check Box A dialog box component that allows selection of options. Select none, some, or all of the available check boxes (see Radio Button and List Box).

City The city in the district address.

Classification Function A coded value indicating the classification or category into which the item fits. Used by Trns•port BAMS/DSS to group items into the same market share.

Clerk Writing Order A coded value indicating the person who took an order for the purchase of plans.

Clicking Pressing and releasing one of the mouse buttons, usually the left button.

Combine Flag Trns*port will take several different category items and combine them into a single proposal line item under certain conditions. To stop Trns*port from doing that, enter an `N' for this field. That will force Trns*port to create a separate proposal line item for this category item. Trns*port will combine different category items into a single proposal line item if they match in five fields: the item number, the supplemental description, the item alternate code, the supplemental proposal description, and proposal section number.

Combine with Like Categories The default value for this flag is **YES. Do not change this flag.** Trns•port can combine several categories into a single proposal section according to some simple rules. If you do not want that to happen, force Trns•port to put all the Items in this category into their own proposal section. If the check box is marked, then Trns•port combines all the Items into a single proposal section. This field in conjunction with the Combine with Like Items flag controls the rolling up of item quantities for bidding.

Combine with Like Items Trns•port combines category items into a single proposal line item if they match in four fields: the item number, the supplemental description, the item alternate code, and the supplemental proposal description. If you check the Combine with Like Items check box, each item will only appear once in the proposal, even if you list it in more than one category. Trns•port will combine items if the item code (if filled in) is the same and if the alternate code and supplemental descriptions match exactly. If you remove the check from the check box, Trns•port will not roll up the items. Items that meet these criteria must reside in categories that have the same federal construction class (proposal group) to be rolled up into the same section of the proposal.

Command Button Part of a dialog box that executes a command when you choose the button.

Commitment Amount The total dollars committed to the DBE/WBE vendor.

Common Unit of Measure A coded value from the attached UNITS code table indicating the common unit of measure to which Trns•port can convert the item for comparison to other items.

Completion Date See ***Specified Completion Date***.

Construction Engineering Percent (C & E Pct) Not in use by the Department at this time. The default value is 0.00. Do not change it. The amount of construction engineering work to be performed on a project expressed as a percentage of the total category or project amount. If you put a zero in the Construction Engineering Percent field, Trns•port will assume that you mean 0%. Trns•port leaves the field blank by default and assumes the C&E percent is the same as for the project as a whole.

Cont Alt ID 1 Use this field and Cont Alt ID 2 to store identifiers the agency will use for this contract in addition to the Contract ID Trns•port requires. Trns•port does not use this field in any Trns•port processing.

Cont Alt ID 2 Use this field and Cont Alt ID 1 to store identifiers the agency will use for this contract in addition to the Contract ID Trns•port requires. Trns•port does not use this field in any Trns•port processing.

Contract ID A unique identifier for a proposal or contract. Enter the planned District or Central office Contract number, and use it as a Proposal Identifier.

Contract Proposal See proposal.

Contract The written agreement between the contracting authority and the contractor that sets forth the obligations of the parties, including performance of work, furnishing of labor and materials, and basis of payment. Trns•port creates a contract from a proposal when you let and award the proposal. The contract contains all the proposal information needed to manage construction and pay for construction work. Like proposals, contracts consist of projects and sites. Contracts also contain item payment information, voucher information (including retainage and liquidated damages), contractor performance and schedule information, and subcontract and DBE/WBE commitment information. You can modify the contract as the work progresses (see add-on, supplemental agreement, and change order).

Contract Type A value selected from the attached CONTTYP code table, that you use to store a classification of the type of contract this proposal will become (e.g., a maintenance contract). Trns•port prints this field on some reports but does not use it in processing.

Contract Work Type A coded value your agency can use to store a classification for the work type for this contract. For Maintenance contracts, leave the default value "I" – Other. For other contracts, choose a code from the list box.

Contracting Classification A value selected from the attached CONTCLS table that indicates the class of contract.

Contractor Bid A bidder's offer to perform the work in a proposal for specific unit prices specified by the contractor.

Contractor Info A contractor that submits a response to The Department's proposal and offers to perform the work for specific unit prices.

Contractor The winning bidder to whom you award the contract. Any business entity that interacts with The Department; for example, bidders, contractors, subcontractors, material suppliers, escrow agents, railroads, utilities, and consultants are all contractors.

Control Group A group of users who can access the same set of projects, proposals, or contracts (e.g., only users in the Estimates control group can access Estimates projects). Each control group member may only view, change, and delete projects, contracts, or proposals in their own control group. To pass a project, contract, or proposal to another control group for processing, a user can change its control group code to the new group code. When the user saves the project, contract, or proposal, the original control group will no longer have access to it. Trns•port will automatically enter the control group of the user who signed on and added the project in the Control Group field. For example, if an Aeronautics user with a control group of A1 adds a project, the project's control group will be A1 and only other users in the A1 control group or less restrictive control groups (*1, A* or *) will be able to view, change, or delete the project. To pass a project to another control group for processing (e.g., from Estimates to Contracts), a user in the first control group can change the control group code to the new code. After the first user saves the project, the first control group will no longer have access to the project. If you put a specific control group in the field and save the project, only users with a * control group (they can view all projects) can access the project and change the control group.

Control Menu Every window has a control menu, which contains commands that change the size of, move, or close the active window.

Controlling PCN Indicates which project is the controlling project in a multi-project contract. Enter the Financial project Number of the lead project.

Conversion Factor to Common Units Trns•port multiplies this conversion factor by the item quantity to convert the item units to the common unit of measure.

Cost of Plans Used for planholder invoicing in the LAS module. If there is a charge for plans, enter the cost of the plans only, exclusive of sales tax. The default value is 0.00.

Cost of Plans without X-Section Not in use by the Department. Used for planholder invoicing in the LAS module. Trns•port will bill this cost to purchasers of complete plans without cross-references for this proposal.

Cost of Proposal Package Used for planholder invoicing in the LAS module. If the district charges for plans, enter the cost of the complete package of bidding documents, exclusive of sales tax. This field has a default value of 0.00.

Cost of Proposal Used for planholder invoicing in the LAS module. Trns•port will bill this cost to purchasers of plans for this proposal. The default is $0.00. The next fields—Cost of Plans, Cost without X-Section, and Cost Per Plan Sheet—are used for the same purpose.

Cost of Specs Used for planholder invoicing in the LAS module. If there is a charge for specs, enter the cost of the specs only, exclusive of sales tax. Default is 0.00.

Cost Per Plan Sheet Used for planholder invoicing in the LAS module. If the district charges for plans, enter the cost of the specification package only, exclusive of sales tax. Default is 0.00.

Cost Plus Time Bidding A bidding method that involves time with an associated cost in the low bid determination. This type of bidding consists of the traditional work items and represents the total contract amount. The Time component is a bid of the total number of calendar days the bidder will require to complete a milestone. Both the work items and the Cost Plus milestone components appear in the bid proposal and are used to determine the lowest bidder. The total number of calendar days bid by the low bidder for the contract site (Site 00) becomes the contract time and the work item bid component becomes the contract total for contractor payment.

Counties Enter up to four counties for each proposal (select from the list box). Trns•port prints this information on some reports, but does not use it in processing.

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

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

County/City/Cong. Dist Code A coded value indicating that the project or proposal includes work in a county, city, or congressional district.

CSV (Comma Separated Value) A type of file where fields within a record are separated by commas. Used to transfer data between systems.

Current Work The current dollar amount of work the bidding vendor has outstanding.

Date and Time of Purchase The date and time a vendor purchases a set of plans for a particular proposal.

Date of Addendum The date you add the addendum or the date it becomes effective. Enter in MM/DD/YY format.

Date of Estimate The date you complete an estimate. Enter in YY/MM/DD format.

Date of Letting The date you will hold a letting. Enter in YY/MM/DD format.

Date Priced The date you priced an estimate. Enter in YY/MM/DD format.

Date The date you entered the status.

DBE Apply Interest Not in use by the Department at this time. A percentage indicating the average number of times this item is selected for DBEs and the value of the item portion set-aside for.

DBE Approval (Flag) Indicates the acceptability of the vendor to work on a contract.

DBE Certification Date The date on which you certified the vendor for its business enterprise type.

DBE Commitment Bidders state that if the Department of Transportation awards them a particular contract, they will use a particular qualified DBE vendor as a subcontractor or supplier. Bidders also specify the value of work the DBE will perform.

DBE Disadvantaged Owned Business Enterprise.

DBE Goals A value selected from the attached DBENOTE code table, that indicates which of the two goals described above apply to this proposal. If you choose NONE, Trns•port will not print goals on any report. If you choose DBE, Trns•port will only print the DBE/MBE goal and will label it a DBE goal. If you choose BOTH, Trns•port will print both the DBE/MBE goal (labeled as an MBE goal) and the WBE goal.

DBE Interest Flag Not in use by the Department at this time. Indicates whether an item is often of interest to or is selected for DBW/WBE set-aside.

DBE Interest Percent to Apply A percentage indicating the average number of times this item is selected for DBEs and the value of the item portion set aside for DBEs.

DBE/MBE Goal A percentage goal set for disadvantaged (DBE) or minority (MBE) business enterprises for a proposal.

DBE/WBE Code A coded value (which must be in the DBETYPE code table) indicating whether the vendor is a DBE, WBE, or MBE.

DBE/WBE Commitment A contract proposal might require that a percentage of a project be subcontracted to MBEs. When the prime contractor submits plans to meet these requirements (that is, what work item(s) will be subcontracted to which subcontractors), enter and track these DBE/WBE commitments in Trns•port.

DBE/WBE Vendor Number The vendor code for the particular DBE/WBE vendor, which must be in the VENDOR file.

DBE/WBE Vendor Set a flag for any vendor in the Vendor file to indicate that the vendor is a DBE, a MBE, or a WBE for minority hiring.

Delete The lowest level of deleting. Usually deletes one data record from one file, so you will only see one Delete Warning window. (See also Power Delete and Strong Delete).

Descending List order such that the first character of each successive list element has a symbol that occurs earlier in the alphabet or number system than the preceding element. The list of numbers 40, 20, 10 and the list of codes Z44, C11, A25 are in descending order (see Ascending).

Description Trns•port prints on most project reports. These two lines of data allow you to enter a brief description (maximum 120 characters). When Trns•port lists projects in a scroll window, it displays the first 28 characters of the project description with the PCN. The first 28 characters should therefore contain enough information to uniquely identify a project from all other projects.

Designer The city, county, consultant, or squad that designed the project. Selected from the attached STAFF code table.

Detail Window Detail windows allow you to add, change, or browse information about a selected project, category, item, and so forth.

Dialog Box A box displayed on the screen that allows you to input information. It can contain text boxes, list boxes, command buttons, radio buttons, and check boxes.

District The district where a project or contract is located. Enter the managing district for the project, by clicking on the list box and selecting your district.

Document Number If the state has an internal referencing number or library system for documents, this field would hold that number. Trns•port does not use it in any Trns•port processing.

Double-Clicking Pressing a mouse button twice in rapid succession.

Dragging Using the mouse to highlight an area of the screen that is larger than one character. Point the mouse to the beginning of the area to highlight and click the left button. Hold down the mouse button and drag the mouse until you have highlighted the desired area.

E&C The percentage of engineering and contingency expenses for a construction project.

Encumbrance Dedicating funds for a construction project.

Engineer A code value (that must be in the STAFF code table) indicating the engineer in charge of the district, area office, residency or field office.

Enter the Financial project Number of the lead project.

Escrow Account A bank account set up by a vendor in which the Department will deposit the money normally retained by the Department. The account will earn interest for the vendor, but the vendor cannot make withdrawals until the Department authorizes the bank to do so.

Estimate Comments Textual comments or remarks about the estimate.

Estimate Info The amount the contractor will receive for the estimated work performed on the contract during a pay period. Trns•port bases the pay estimate on Item Progress and adjustments made for various reasons. This entity also includes a breakdown of the payments.

Estimate Numerous estimates are prepared over the life of a project. Use Trns•port to produce these three: *Preliminary Detail Estimate:* Also referred to as the P, S & E Estimate, this report provides a project view of costs, including add-on percentages and funding breakdowns. *Proposal Estimate:* Also referred to as the Design Estimate or Engineer's Estimate, this estimate contains a list of proposal items and the (estimated) costs. *Final Detail Estimate:* Also referred to as the Contract Agreement Estimate. This estimate uses the contractor's bid prices as the "estimate."

Estimated Amount of Project The total estimated amount of work for a project. The default is "0". It is automatically filled by Trns•port PES each time the Preliminary Detailed Estimate process is run.

Estimated Item Price The engineer's estimated unit price for an item. Trns•port uses this field to determine an item’s cost for the Detailed Estimate. Defaults to 0.000, but you can modify the value.

Estimated Item Quantity The estimated quantity of work for an item.

Estimated Price Lock Indicates whether you have finalized an estimated item price and it should therefore not be modified by users or the system.

Estimated Price The Department's estimated cost for one unit of an item. Trns•port uses this field to determine an item's cost for the Detailed Estimate.

Estimated Quantity Used with Estimated Price to determine the cost of an item. Used in Trns•port LAS to determine the value of bids, in Trns•port CAS to determine the authorized item quantity, and in Trns•port BAMS/DSS to analyze construction overruns. Used with Estimated Price to determine the cost of an item. Used in Trns•port LAS to determine the value of bids, in Trns•port SiteManager to determine the authorized item quantity, and in Trns•port BAMS/DSS to analyze contract overruns. Defaults to 0.000, but you can modify the value.

Estimated Unit Price The engineer’s estimated cost for one unit of an item. Trns•port uses this field to determine an item’s cost for the Detailed Estimate. Defaults to 0.000, but modify the value as necessary.

Exempt from Retainage Not in use by the Department at this time. Indicates whether Trns•port should withhold retainage for work performed on a specific item.

Extended Amount from Proposal The bidder's extended price amount for a line item in the proposal and section and proposal totals. Trns•port uses this field in production and Trns•port BAMS/DSS models use it.

Extra A change to a contract to add additional work items.

Federal Appropriation Codes A coded value indicating the type of federal appropriation.

Federal Construction Class Describes the type of construction used for the category. The Department can define its own codes and enter them in the FEDCCLS code table. Trns•port uses this field to determine whether categories can be combined. For Maintenance contracts, this field will always be “M”. When you combine categories and Items in a proposal, Trns•port adds categories together if they have the same Federal Construction Class.

Federal Funding Mark the check box if the fund contains federal dollars. If you check the Federal Funding box, the funding source is a participating fund, which means that the federal government is participating in funding these category Items. If you do not check the box, the funding source is non-participating, which means that the funding is 100% state or a combination of state and local.

Federal Participation Indicates whether a specific fund is a federal fund.

Federal Work Category Not in use by the Department at this time. It is the same as Category Work Class, except the FEDWTYP table is used. Identifies roadway, structure, or sewer groupings. You are not required to, but you may enter information in these fields to record additional information about a project.

Federal/State Project Number The federal or state project number identifying a project, proposal, or contract. Enter N/A for all maintenance projects.

FHWA The Federal Highway Administration.

Field Book Not in use by the Department at this time. If checked, this check box indicates that the project is maintained using a field book machine.

File An entity that stores all information associated with one Trns•port project.

Filter A way to quickly locate records in Client/Server Trns•port list windows. You can specify search criteria to find a group of records.

Finance Code Letters that usually precede the control section.

Fixed Price (Pre-Established Price) This indicates that the bidder is required to bid the price specified by the Department. If you set this flag to "Y", the Estimated (or Revised) Price of the item will appear already filled in on bidders' proposal schedules. The default value for this field is "N".

Force Account An item of work the Department pays at the contractor's cost rather than at a bid price. A force account includes the materials, labor and equipment the contractor actually uses to perform the work and might include state-specified allowances for overhead and profit. State-specified schedules usually determine labor and equipment costs rather than the contractor's actual payments. You will typically use force account items when there is uncertainty about the work involved for the item and you cannot bid it knowledgeably. Examples include utilities relocation and toxic waste removal. Because you pay the item at cost, the unit of measure is dollars. Therefore, you often estimate force account items as if they were lump sum. Because a force account is not a bid item, Trns•port does not pass it to Trns•port CAS or Trns•port BAMS/DSS.

Fuel Adjustment Type A coded value indicating that an item might require a fuel price adjustment.

Fund Assign funding sources at the project, category, and item level. Typically, you specify funding sources at the category level; however, specify default funding at the project level and identify individual items as nonparticipating in category or project-level funding sources. The funding defined for a category can consist of multiple sources with funding limitations and priorities established for each source.

Fund Code A unique identifier for a funding source.

Fund Priority Order A sequence number you use to indicate the order in which you should encumber funds when certain funds have limited participation.

Funding Description A short description of the fund.

Funding Group An identifier used to associate funds into groups.

Funding Participation Limit The maximum amount, in dollars, that a fund will pay for this category.

Funding Participation Percent The portion of work a particular fund will pay.

Funding Prefix An alternate name for a fund.

General Description/Comment A short description or written comment about the particular DBE/WBE vendor.

Generics Extra fields Trns•port does not use in any processing. These fields will only appear on reports that you have customized to include them. If you use a generic field, you can redefine the field description (that is, the field label displayed on the window) to indicate the contents or use of the field.

Highlight To shade an area to change its appearance. Highlight with a mouse by pointing and clicking on the beginning of the area and dragging until you shade the desired area.

Highway Number The identifier for the highway being worked on in a project.

Highway Type A coded value indicating the type of highway (for example, asphalt, concrete, or dirt or two-lane or four-lane limited access).

Historical Price The price that you have historically used for an item.

Icon A symbol representing an application in the Microsoft Windows operating environment. Icons might or might not be active. An icon's name is the same as the application it represents.

Increase/Decrease A modification of a regular/structure/sewer item's authorized quantity as specified by a recommendation.

InspDailyRpt (Inspector's Daily Report) A written report generated every working day by an inspector that describes the work performed on a Contract monitored by that inspector.

Invoice Number A unique identifier for a planholder invoice.

IRS Number The Federal Employer Identification (FEI) number assigned to the vendor by the IRS.

Item Alternate Code Different items can serve as alternates for each other, which means that a bidder can choose to bid on either item, but not both. The first two characters of the item alternate code specify the alternate set and the third character indicates the choice within the set.

Item Classification Function A coded value indicating the classification or category into which the item fits. Used by Trns•port BAMS/DSS to group items into the same market share.
Caution: When you assign an item classification to an item, be sure that the item has the same unit of measure or the same common unit of measure as the other items in the item class.

Item Material Information and factors linking a regular/structure/sewer item to the material that comprises the item.

Item Number The Item Number from the Master Pay Item List. It is contained in the ITEMLIST code table of Trns•port.

Item Progress The quantity of a regular/structure/sewer item performed between successive measurements or estimates made by the Department inspectors or engineers.

Item Summary A particular, quantified part of the work in a proposal. If the work quantity is not measurable, Trns•port sets the quantity to 1.00 for the lump sum item. An item summary contains the dollar value of all work in a proposal.

Item The smallest unit of work identified within a project. Items can represent biddable work or non-biddable work such as rights-of-way and force accounts. You can define groups of items to represent alternate design possibilities and you can divide the quantity of work for an item across multiple categories within a project.

Item year Because Trns•port contains projects designed at different times, you may not change the reference information about each item (such as description and unit). Doing so would change the meaning of projects already in progress. Instead, create new reference item lists when necessary. You may distinguish these lists by a spec year.

Last Addendum Number The last addendum number used for a proposal.

Last Description Number Filled in automatically by Trns•port when you enter long descriptions.

Last Revision Date someone last revised the estimate. Enter in YY/MM/DD format

Latitude of Address The latitude on a map of the vendor's address.

Latitude of Midpoint The default value is 650000, and may be changed as appropriate. Enter latitude in the form degrees, minutes, seconds.

Letting Address A description of the letting location.

Letting Call Order The order in which you will open a bid for a specified proposal during a bid letting.

Letting Number A unique identifying number or alphanumeric for a letting. It may be composed of any combination of eight numbers and letters. For lettings in the districts, allocate two positions for the district number, two for the year, two for the month, and two for the date. This will be in the form of ##YYMMDD, where ## represents the district number. If the occasion should arise that you will hold a second letting on the same date, you may insert a "B" in position seven. The Central Office lettings commence with a prefix of CT.

Letting Proposal Call Order The order in which you will open a bid for a specified proposal during a bid letting.

Letting Status of Proposal A coded value indicating the status of a proposal.

Lien/Claim A statement by an individual or company that they are owed a payment because of conditions caused by the contractor's work or performance.

Liquidated Damages Per Day The amount to be charged, in whole dollars, for each day that a contractor exceeds the allowed time for a contract. This has a default value of "1" and will not be used in preparing bidding documents. Trns•port cannot handle the liquidated damages table contained in the Standard Specifications for Road and Bridge Construction.

List Box Part of a dialog box that contains a list of choices. Select one of the choices at a time. The list box will have a scroll bar to help you move through the list (see Radio Button and Check Box).

List Window A list window contains a list of records relating to a particular process (for example, Projects). From a list window, select a specific record and open a detail window that contains the fields and data associated with the record.

Location of Bid Deposit The location at which bidders should deposit bids.

Location of Letting The location at which bids will be opened.

Location The site where work is being performed for the proposal.

Long Description 2 A continuation of the long description of the item (maximum 60 additional characters, if needed).

Long Description A long description of the item (maximum 60 characters).

Longitude of Address The longitude on a map of the vendor's address.

Longitude of Midpoint The default value is 1650000, and may be changed as appropriate. Enter longitude in the form degrees, minutes, seconds.

Low Cost Bid Item Flag Generated by Trns•port in the Bid Tab Edit process, this flag indicates whether the item is a low-cost item. If the item has alternates or is an alternate, only one of the alternates will be flagged as the low-cost item.

Lump Sum Item Units A value, selected from the attached UNITS code table, that identifies the type of measurement used to determine the unit of one lump sum item.

Major Item Flag Indicates that an item is important enough to appear on the Notice to Contractors, regardless of the dollar amounts allocated to it.

Material Any measurable, physical substance used to perform an item of work or the substance of the completed item itself.

Maximum Capacity The maximum amount of work, in dollars, that a vendor can perform.

Maximum Contract Amount Paid A limit, expressed as a percentage of the original contract amount, for an automatically paid item.

MBE Minority Owned Business Enterprise.

Menu A list of related commands that you open and view.

Misc Item Non-standard items added to a project, which you identify as "7000" items. Trns•port calls these non-standard items.

Mouse Hand-held mechanical device used to position the cursor and perform actions on the screen.

Non-Bid Item An item, such as a state-supplied item, that will be included in the project but will not appear on any bid documents.

Non-Federal Participating Item An item in a construction project that is not eligible for federal funding.

Non-Participating Fund Code Identifies a fund that will fund 100 percent of the work for a project item. Trns•port will exclude the work for this item from funding for the category that contains the item.

Notice Publication Date The date you will notify potential bidders of the letting of a proposal.

Notice to Proceed Written notice to the contractor to proceed with the contract work and the contract beginning date.

Number of Days Bid In a Cost Plus Time bid, the bid time number of days bid for the associated letting proposal's awarded vendor for an associated proposal site.

Number of Days The number of available or calendar days that are available for completion of a contract site. Leave this field blank if you selected Completion Date for the Type of Days field above.

Number of Label Sets The number of sets of labels to be generated when you generate labels for this order. You must fill in this field for Trns•port to generate labels. Valid values are zero through nine.

Number of Pages The number of pages of the special provision.

Number of Plan Sheets The number of plan sheets purchased by a vendor.

Number of Spans The number of spans of the structure represented by a category.

Obsolete Flag Indicates whether the special provision is in effect or obsolete.

Obsolete Item Flag Indicates that an item is obsolete and should no longer be used on new projects.

Obsolete Vendor Indicates that a vendor is obsolete and therefore should no longer be used.

Officer's Address Number The vendor address sequence number identifying the vendor officer's address.

Ordered by The name of the person ordering the proposal plans.

Originating Date of Specification The date a special provision is effective.

OTSH One time shipping address.

P, S&E Plans, specifications, and estimates for a project.

Part A collection of related portions of regular/structure/sewer items in a project. In a typical project, The Department breaks down roadway items and bridge items into separate parts.

Partial Payment Item Items for which work occurred during a voucher cycle paid according to quantity placed (excluding substandard work).

Passed to CAS/DSS Indicates whether a contract has been passed to DSS (D), CAS (C), or both (B).

Password A code Trns•port uses to identify you in conjunction with your user name when you sign on to Trns•port. You must keep your password secret to prevent other people from accessing your files without your knowledge.

Pay Adjustment Adjustments applied to contract project payments.

Pay Item Year The Department no longer creates a new pay item list each time a specification book is issued. For the foreseeable future, the Specification year and Pay Item year fields will remain as "00".

Pay Quantity The quantity of an item for which a specific estimate will pay. It will usually be the sum of the item progress quantities performed since the previous estimate, but it might be different because the Department withholds payment for various reasons.

Payment Fund A fund and dollar amount that you designate to pay for part of an estimate.

Payment Voucher A record of what the payment should be to a contractor or escrow account for a particular project. Trns•port generates this voucher for treasury and billings.

Percent Complete Basis A coded value indicating the method used to determine the current percent of work complete.

Percent Complete Threshold A percent of item completion that determines if an item should be paid automatically.

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

Percent of Quantity Paid The percentage of the current item quantity to be paid to date at an automatic payment threshold.

Percent Ownership The vendor's percentage of ownership of the affiliated company.

PES Worksheet An interactive process that allows users to add items and item level data to projects quickly. The functionality is provided through an interactive, spreadsheet-like data entry window. Users are able to enter project item data from scratch, input data, or modify existing PES item data.

Phone The phone number (including area code or extension) of the district, area office, field office, or residency.

Physical Road Number The name or number of the road where the project work is being performed.

Planholder A vendor to whom you issue a proposal package that is valid to submit as a bid. Courtesy planholders purchase proposal packages on which they cannot bid.

Pointing Moving the mouse until the tip of the arrow on the screen rests on a desired object. You can place the mouse on a flat surface and slide it to the object.

Power Delete The second level of deleting. Deletes multiple records from more than one file, so you will see two Delete Warning windows. For example, if you are deleting a bid letting package, Power Delete will delete the letting call, bids, planholders, and proposal. (See also Delete and Strong Delete)

Pre-Established Price Indicates that the bidder is required to bid the price specified by the Department.

Prequalification Certification Date The date you qualify the vendor to perform the type of work certified for the state.

Prequalification Expiration Date The date the vendor's qualification for certification for work expires.

Prequalification Update List Date The date you schedule to review the list of vendors who have pre-qualified.

Previously Let As CONTID Indicates the contract ID under which a proposal was previously let.

Price Index A coded value indicating that Trns•port should automatically adjust item prices for inflation according to the index.

Price Lock Flag The default value for this field is "N". There is a Trns*port PES process called Generate Bid Based Prices which may be used to fill in all the Estimated Prices. That process uses historical bid data in the BAMS/DSS module to determine an estimated price for each item. If you set this field to `Y', the Generate Bid Based Prices process will NOT compute a price for this item, leaving the manually entered price in place.

Priced by Indicates the person from the attached STAFF code table who priced an estimate.

Primary DBE/WBE Code A coded value indicating the vendor's business enterprise certification type.

Primary District The managing district.

Prime Project **Not used by the Department.** A prime project generally represents all work to be performed under a single federal project number. This work is subdivided into Trns•port projects. Each Trns•port project represents a logical portion of the prime project one project might contain all bid items, another preliminary engineering and rights-of-way, and another non-biddable construction work such as force accounts.

Project Beginning Termini, Ending Termini, Beginning Station, Ending Station These fields let you define more precisely where the project work is taking place using notation defined by your agency. Trns•port passes this data, which Trns•port prints on some reports, to Trns•port BAMS/DSS to pinpoint the project on maps.

Project Control Number (PCN) A unique number or alphanumeric that identifies a project.

Project Description Trns•port prints on most project reports. These two lines of data allow you to enter a brief description (maximum 120 characters). When Trns•port lists projects in a scroll window, it displays the first 28 characters of the project description with the PCN. The first 28 characters should therefore contain enough information to uniquely identify a project from all other projects.

Project Each Trns•port project represents costs associated with all or part of a construction project. The information used to define a PROJECT generally comes from The Department's Program Planning and Design branches.

Project Grade Not used in Trns•port processing. Trns•port prints this code on some Trns•port reports. Values entered here must be in the GRADING code table to be legal. Each agency can specify codes that are meaningful to the agency.

Project Item Line Number A unique sequential identifier for an item within a project. This is a four digit number Trns•port uses to identify the item. Trns•port will automatically enter this value when you run certain processes. When an addendum is being created, you identify an item to be changed by choosing a value from the attached drop down list. When you select a category number, Trns•port fills in the Project item Line Number list with all project item line numbers for the selected project and category.

Project Item See Item.

Project Item Sequence Number A unique sequential identifier for an item within a project.

Project Location The location of the primary work performed in the project.

Project Number Enter the Financial Project (FINPROJ) Number.

Project Road Name The name of the primary road on which project work is being performed.

Project Sequence Number A sequential number for each event entered.

Project Type A value, selected from the attached PROJTYP table. The Department specifies its own values for the PROJTYP table. Leave this field blank for Maintenance projects.

Project Work Type A value, selected from the attached PWRKTYP table. The Department specifies its own values for the PWRKTYP table. Enter a value in the Project Work Type field to run this project through the Bid-Based Prices processes. Project Work Type is one parameter used to determine the bid-based price. Leave this field blank for Maintenance projects

Proposal Addendum Number A sequential number identifying a proposal addendum. Trns•port enters a sequential value automatically.

Proposal Bid Total The total cost of the proposal as determined by the bidder.

Proposal Call Order The order in which you will open a bid for a specified proposal.

Proposal Class For maintenance projects enter "I" from the list box.

Proposal DBE Goals A code (which must be in the DBENOTE: code table) indicating which of the two goals described above apply to this proposal. If you enter NONE, Trns•port will not print goals on any report. If you enter DBE, Trns•port will only print the DBE/MBE goal and label it a DBE goal. If you enter BOTH, Trns•port will print both the DBE/MBE goal (labeled as an MBE goal) and the WBE goal.

Proposal Fund Type A coded value indicating the kind of funding used for the proposal.

Proposal Item Each proposal section is a collection of one or more proposal items. Each proposal item is a bid item. Trns•port constructs proposal items from one or more project items by combining items with the same item code from the same section. You can override this "folding" of similar project items. Similar project items will create separate proposal bid items.

Proposal Line Number A unique sequential number that identifies a line item within a proposal.

Proposal Location The site where work is being performed for the proposal.

Proposal Notes Available for special notes that need to be communicated to bidders. Limited to 60 characters.

Proposal Number Held If the state has a serial sequence number or a numbering system for proposals, this field would hold that number. Trns•port does not use it in any Trns•port processing.

Proposal Schedule A listing of contract items in the proposal form that show quantities and units of measurement and have blank spaces for bid price insertion.

Proposal Section Number A unique sequential identifier for a proposal section.

Proposal Section Represents a grouping of proposal items. Trns•port creates sections by grouping all categories with the same work class on all projects assigned to the proposal. You can override this "folding" of similar categories into single sections. Then similar project categories will create separate proposal sections. Trns•port will always assign project categories representing different alternates to different proposal sections. The description field will be the description of the lowest MA number in the project. This description should be changed to reflect the overall project.

Proposal The entities presented to potential contractors for bidding. You construct a proposal from Trns•port projects. Typically, you combine multiple projects into a single proposal. (You cannot add an individual project to more than one proposal or split it among multiple proposals.) Proposal information generally includes contract time specifications, DBE/WBE goals, bonding information, a detailed description of the work the contractor will perform, and an identification of any necessary special provisions, supplemental specifications, or both.

Proposal Type A coded value indicating the type of proposal (for example, a proposal specifically for small businesses).

Proposed Letting Date This field is entered from the FM system. If the date is in error, see the Work Program office to have it corrected.

Qualification Amount The total dollar value of contracts for which the vendor is qualified to work.

Qualification Classes A classification of work for which a vendor is qualified.

Quantity of Complete Plans The number of complete plans purchased by a vendor.

Quantity of Complete Plans without Cross-X The number of complete plans without cross-references purchased by a vendor.

Quantity of Proposals The number of proposals purchased by a given vendor.

Radio Button Part of a dialog box that allows you to select one option from a group of related options. Each choice has a circular button (see List Box and Check Box).

Reason for Non- Processing A coded value indicating the reason Trns•port did not process a proposal.

Recommendation Modification of contract items, such as extending the authorized time, changing an item quantity, or adding a new item to a project.

Regular/Structure/Sewer Item A particular, quantified part of the work in a project (if the work quantity is not measurable, Trns•port sets the quantity to 1.00 for the lump sum item). Regular/structure/sewer item contains the dollar value of all work in a project. This entity includes regular items, structure and bridge items, and sewer items.

Relation to Vendor A coded value indicating the relationship between a vendor and its affiliate.

Retainage The amount withheld from voucher payments made to a contractor pending completion of a contract.

Revised by A coded value indicating the person who revised an estimate.

Revised Item Price A revised price for an estimate item. If you enter a value, Trns•port will use it instead of the original engineer's estimated item price.

Revised Price Change the Estimated Price by filling in a new value in this field. Trns•port will use the Revised Price instead of the Estimated Price whenever this field is non-blank, which allows you to keep a record of the changes you have made to any of the estimated prices.

Road Name The name of the primary road associated with the prime project.

Road Section Number An identifier for the road section in which construction is taking place.

Road Section Number, Beginning Termini, Ending Termini, Beginning Station, Ending Station Identifiers for the road section in which construction is taking place.

Road System A coded value indicating the road system of which this highway is a part (for example, interstate or federal, state or county highway).

Road User Cost Per Day A value used in determining the low bidder in a Cost Plus Time bid. A value can only be entered in this field if the value in the Type of Days field is CD or AD. A non-blank value in this field indicates the Site is a Cost Plus Time Site. The value is the cost per day of the inconvenience of the construction.

Route Number The route number of the road affected by a project.

Sales Tax Code A coded value indicating the sales tax that applies to the vendor. The Department does not collect sales tax.

Scroll Bar A rectangular box in list boxes or windows. The bar contains up and down scroll arrows or left and right scroll arrows and a scroll box. The scroll bar allows mouse users to move through text to view sections that are not currently visible. To scroll, click and drag the scroll box or click the scroll arrows.

Scrolling Move the cursor left or right or up or down to see parts of the text that are not currently visible (see Scroll Bar).

Section Assignment Flag telling Trns•port to assign project categories to proposal sections automatically or do it manually by entering section numbers in the category records. The default value is Y, which means Trns•port will automatically assign categories to sections.

Section Description A short description of the proposal section.

Section Number See Proposal Section Number.

Section See Proposal Section Number.

Securities Account A contractor can establish an escrow account with the Department so that the Department can hold securities in place of retainage.

Securities in Lieu of Retainage Not in use by the Department at this time. A flag indicating whether you will allow the contractor to deposit securities with the agency to reduce the amount of retainage withheld in payment vouchers.

Set Aside Proposal A value, selected from the attached SETASID code table that indicates you have set aside a proposal for a particular purpose. Leave blank, this is not presently in use.

SHA State Highway Agency.

Ship-to Address Number The vendor address sequence number of a planholder's shipping address.

Short Description A short description of the item (maximum 40 characters). When Trns•port lists items on a scroll window, Trns•port displays the first 30 characters of the item short description beside the item number. The first 30 characters should therefore contain enough information to uniquely distinguish an item from all other items.

Site Number A unique identifying sequence number for each site. Each contract must have a site 00, which represents the contract as a whole, in addition to any other sites.

Site Proposal sites represent work locations for which time charges are accrued. The default situation is for a single site of time charges to accrue on the contract as a whole. If contractors will construct several project entities (for example, bridges) as part of a single contract, you can treat each project entity as a separate site to assign completion time and assess liquidated damages.

Social Security Number The social security number of the vendor officer.

Source of Price A value, selected from the attached PRICSPR code table, that indicates the originating source of an estimated price for an item (e.g., estimated or historical). Defaults to “E” for estimated. You can indicate in the Source of Price field how Trns•port determined the estimated or revised price. Trns•port sets it to E, but you can change it. This field identifies where the estimated price came from, but does not apply to the revised price, and the source of price field can contain an “E” for the engineer estimated the cost, “GBBA” for a bid-based average, “GBBR” for a bid-based regression, or “H” for a historical price.

Spec Bk Year is available to indicate in Trns•port the year of the specification book that is to govern the administration of the particular contract. The default value is 04.

Spec Book The general rules covering acceptable work and practices for contracts with an SHA.

Spec Year A default value of 00 has been set. Because Trns•port contains projects designed at different times, you cannot change the reference information about each item (such as description and unit). Doing so would change the meaning of projects already in progress. Instead, you can create entirely new reference item lists when necessary. You can distinguish these lists by a specification year. This field identifies the specification year item list used on the project. You are not required to, but you can enter information in these fields to record additional information about a proposal.

Special Provision Code A unique identifier for a special provision. Not in use by the Department.

Special Provision Description A short description of the special provision. Not in use by the Department.

Special Provision Text File Name A field that identifies the library member of which the special provision is a part. Not in use by the Department.

Special Provision Type A coded value indicating the type of special provision. Not in use by the Department.

Special Provisions This feature is not now in use by the Department. Flag used to tell Trns•port if you will assign special provisions to this proposal that are print with the proposal schedule. The default value is N (you have assigned no special provisions).

Special Start Date Available to indicate to bidders cases where a special start date will be established.

Specialty Item Flag Indicates whether an item is a specialty item.

Specification Number A classification number for types of construction items as used in the Specification Book.

Specification Year Because Trns•port contains projects designed at different times, you cannot change the reference information about each item (such as description and unit). Doing so would change the meaning of projects already in progress. Instead, you can create entirely new reference item lists when necessary. See Pay Item Year for FDOT use of this field.

Specified Completion Date The projected date when the contractor will complete work for a given site. Maintenance Contracts should indicate the contract completion date in this field, for example June 30, 2005.

Specified Start Date The project date when the contractor will start work on a given site. Maintenance Contracts should indicate the contract start date in this field, for example July 1, 2004.

State Mat Flag (State Furnished) The default value for this field is "N". You may have a few non-biddable items that by all logic seem to belong grouped together with the biddable items. You could create an artificial, non-biddable project for those items, but Trns*port allows you to enter them in the logical place, and flag them by placing a `Y' in this field. Non-Bid items will **not** appear in any bid documents, and will **not** be passed to SiteManager. A common use for this field is to identify FHP use on a project.

State of Incorporation A coded value indicating the state in which the vendor company is incorporated.

State, Zip The two-letter state code and zip code for the district's address.

Status A value (which must appear in the PRJSTAT code table) used to indicate the status of a project (for example, in design or ready to let) or left blank. Trns•port includes this field on some reports, but does not use it elsewhere.

Status Date The date you entered the status.

Status of Bid A coded value indicating the status of the vendor's bid.

Status of Letting A coded value indicating the status of the letting (for example, planned, scheduled, or postponed).

Stockpile A quantified amount of a material delivered to the contract site for use in a specific item.

Stockpile Change Adding new material to a stockpile or removing material already in the stockpile for placement in a regular/structure/sewer item.

Strong Delete The third level of deleting. Deletes multiple records from more than one file, so you should see three Delete Warning windows. For example, if you are deleting a bid-letting package, Strong Delete will delete the letting call, bids, planholders, the proposal and the projects, items and funds (the whole tree of data). (See also Delete and Power Delete)

Structure Work Type Similar to the Federal Work Category, except that the FEDSUPP Code Table is used.

Subcontract A subcontract in Trns•port describes the contract work that the prime contractor will not perform. You may divide subcontracts into items and define subcontracted quantities. Each subcontract item can have a partial item percentage applied to it, which indicates that the subcontractor will perform only part of the item work.

Subcontractor An individual, firm or corporation to which the contractor sublets part of the contract.

Subcontractor An individual, firm, or corporation to which the contractor sublets part of the contract.

Subcontractor Payment Money paid by the contractor who holds a contract with the Department to a vendor that might be the subject of a DBE commitment for the contract.

Supplemental Agreement A written agreement between the contracting authority and the contractor that you execute on the prescribed form and get approved as required by law. The supplemental agreement covers extra work, alterations, or adjustments as provided for within the scope of the contract. The extra work or change order constitutes a modification of the contract as originally executed and approved.

Supplemental Description 2 An additional 40 characters used for item descriptions.

Supplemental Description Used only for miscellaneous items. Not in use by the Department at this time.

Supplemental Item year Can be used by the agency to denote a supplemental item year in addition to the primary item year. Trns•port does not use this field in any processing

Supplemental Proposal Description Additional project-specific descriptive information for a project item.

Supplemental Specification Year has been renamed to Specification Book Year and is available for projects and proposals as necessary.

Supplementary Work Code Similar to the Federal Work Category except that Trns•port uses the FEDSUPP code table. A coded value indicating the type of federal work performed in a category.

Supplier Only Flag Indicates that a vendor might be a supplier of materials only.

Surety Agent ID Trns•port treats surety agents as vendors for information storage. This field holds the vendor code of the surety agent for this bid. The value entered here must appear in the VENDOR file.

Surety Company ID Trns•port treats surety companies as vendors for storing information in Trns•port. This field holds the vendor code of the surety company for this bid. The value entered here must appear in the VENDOR file.

Text Box A dialog box component that accepts input you type in or copy from another file.

Time Charge Number of days worked on a particular site. Used to track contractor work time and assess liquidated damages, if necessary.

Time Extension A modification (usually an increase) in the time a contractor can work on a contract without incurring a penalty.

Time Method See Type of Days.

Time of Letting The time a letting will be held.

Title of Officer The title of a vendor officer.

Trns•port AASHTO's information system for managing transportation programs. A computerized system through which a SHA can manage construction projects. Modules include Trns•port CES, Trns•port PES, Trns•port LAS, Trns•port CAS, and Trns•port BAMS/DSS.

Type of Action The type of action (add, change or delete) to be performed by an addendum item.

Type of Bid Received A coded value indicating the type of bid.

Type of Corporation A coded value indicating the type of business structure used by a vendor.

Type of Days A coded value indicating whether Trns•port should base contract time on available working days, calendar days, or a completion date. Maintenance contracts should indicate Completion Date in this field.

Type of Item (Materials) A coded value (which must appear in the ITEMTYP code table) identifying the material type of the item.

Type of Line Indicates whether the proposal line is at the item (L), section (S), or proposal (P) level.

Type of Road This field is entered from the FM system. If it is in error, see the Work Program office to have it corrected.

Type of Vendor A coded value indicating the type of vendor.

Type of Vendor Certification A coded value indicating the type of work a vendor is authorized to perform.

Type of Work Classification A coded value (which must appear in the VWRKCLS code table) indicating the classification of work the vendor is qualified to perform.

Uncompleted Work The amount of work, in dollars, a vendor has outstanding.

Unit Bid Price The bidder's unit price for a line item in the proposal. Trns•port requires this field if the Type of Line is L at the item level. Trns•port uses this field in production and Trns•port BAMS/DSS models use it.

Unit Description The description to appear on the unit-level funding summary report for a given unit number.

Unit Number A unique identifier for a unit. You may put whatever values you like in this field. Unit numbers provide a way to group categories for reporting purposes on the Funding Summary and Funding Summary by Unit reports in the Detailed Estimate. If you do not assign a unit number, the unit number will appear as 000 on the Funding Summary report. When you assign a unit number and project-level funding, be sure to assign a unit number to all categories, not just the 0000 category (project-level funds). Not in use at this time. The default value is 000. **Do not change this value.**

Unit of Measure A coded value (which must appear in the UNITS code table) indicating the type of measurement used to determine one unit for lump sum items.

Unit See Unit of Measure.

Unit System This field indicates whether a project will contain items designated as English (E), metric (M), or neither (N).

Units for Lump Sum Items A coded value indicating the type of measure for the item associated with the adjustment index.

Urban/Rural Class A value selected from the URBRUR code table that indicates whether the project classification is rural or urban.

User Name The name by which Trns•port knows you.

User Permission A user's right to view and edit the information in a project file. Each file can have one or more people listed as users for that file. User permission differs from owner permission in that someone with user permission cannot view or edit the project user list for the file.

Valid for Bidding Flag Indicates whether a planholder purchased a valid-for-bidding proposal.

Vendor Address The vendor's address.

Vendor City The vendor's city.

Vendor Name (Long) The vendor name (long description).

Vendor Name (Short) The vendor name (short description).

Vendor Number A unique identifier for a vendor.

Vendor Officer The name of an officer for a vendor.

Vendor Phone Number The vendor's phone number.

Vendor State The vendor's state address.

Vendor Trns•port uses the Vendor file to maintain information about contractors, subcontractors, suppliers, surety companies, surety agents, and escrow agents. You can also use it to store information about counties (or other municipalities) and utilities that perform relevant work. Trns•port uses information about these vendors, their affiliations, officers, addresses, and facilities in numerous Trns•port processes.

Vendor ZIP Code The vendor's zip code.

Viewer Permission A user's right to look at the information in a project file. Each file has one or more people listed as viewers for that file. Trns•port automatically allows whoever creates a file to look at the file because Trns•port gives that person owner permission. The owner of a file can also give other users viewer permission for that file.

Voucher A Trns•port voucher describes a contractor progress payment for a specific project. Trns•port computes voucher information automatically and accounts for partial item quantities performed, material allowances, retainage and liquidated damages. You can make other payment adjustments manually to cover unusual circumstances. Trns•port maintains a complete audit trail of all voucher related information, which allows Trns•port to regenerate previously paid vouchers for review.

WBE Goal (PCT) A percentage amount indicating the goal that has been set for women business enterprises for the proposal.

WBE Goal The dollar amount the prime contractor has actually paid to date to WBE subcontractors and suppliers.

WBE Woman Owned Business Enterprise.

Wild Card A character that can substitute for other characters. You can use a * or ? in the Filter window's Value field with the Like operator.

Work Mix This field is entered from the FM system. If it is in error, see the Work Program office to have it corrected.

Work Type Code A coded value indicating the type of work a vendor is qualified to perform.

Appendix B 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 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 Project, 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 Administration Office. It is necessary that the proposal Control Group remain unchanged while the project is in LAS and the Contracts Administration 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 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 Estimator	CD##*	CD##*
Assistant District Estimator	CD##A*	CD##A*
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 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 office	ML##
Complete award and execute phases	ML##

Construction Project

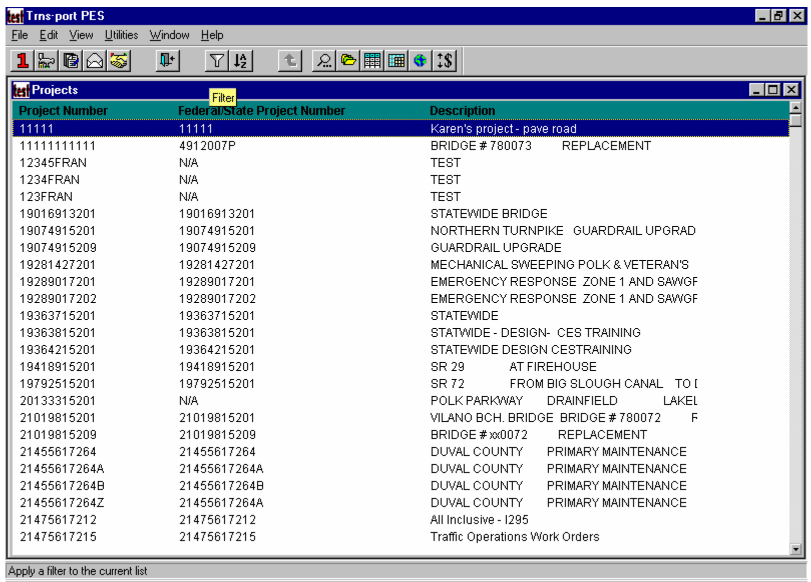
Receive Production Project from FM	CD##
District reassigns project internally	CD##A (or other subset)
Or	
District reassigns to consultant firm	CD##T365 (or other subset)
Pass file to District Estimator	CD##
Create Proposal Header	CD##
Pass to District Contracts office	CL##
Contracts Administration Office activity	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 Class 1 Contract	
Pass file to District Estimator	CD##
Create Proposal Header & Price Job	CD##
Pass to Central Estimator	CC##
Pass to Central Contracts Admin. Office	CT## (or subset if desired)
Pass to Central Estimator for Bid Analysis	CC##
Return record to Contracts office	CT##
Complete award and execute phases	CT##

Appendix C Filtering and Sorting

The Trns•port Filter

A filter provides the user with a means to limit the list of records appearing in a window. The Filter Function is available on most LAS and PES screens. It is especially helpful in limiting an item List. Use the filter to enter selection criteria on one or more fields applicable to the active window.

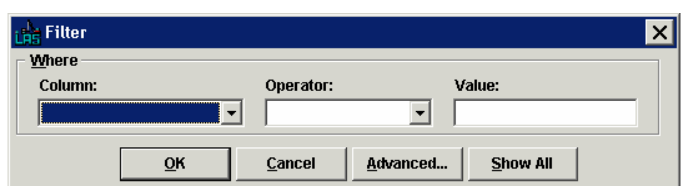
PES and LAS are set up to support both upper and lower case characters. Fields that are populated from the Department mainframe will be in uppercase because the mainframe stores everything in uppercase. For instance, the Item Description is in uppercase, so when filtering on the Short Description field, look for all uppercase characters. All code values are stored in uppercase. When filtering on a code-based field, search for uppercase letters. Other fields, such as the second line of the Location field on the Project Header record, can have both upper and lower case letters in them. Be aware of the case of a field when performing a filter.



To use the Trns•port filter:

- Click the icon that looks like a funnel. 

- This screen will appear.



The list box labeled Column will list all of the fields that are available for the search. The Operator list box contains the relationships that are available between the field that chosen in the Column list box and the entry in the Value box. The Value contains a literal that is being compared to the field in the Column box.

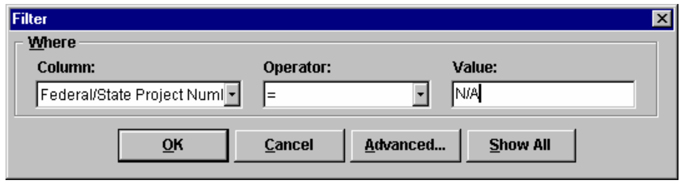
Click the Column, Operator, and Value fields to display lists of values from which to choose the information to be filtered.

Column The Column field contains the names of the most commonly used columns in the table from which the list window is built. When you click the down arrow in the column field, the list of columns to choose from will appear. Select the column you desire.

Operator The Operator field contains the operators equal to (=), greater than (>), less than (<), greater than or equal to (>=), less than or equal to (<=), not equal to (<>), and Contains and Does Not (contain) to narrow the filter. Select the operator you desire.

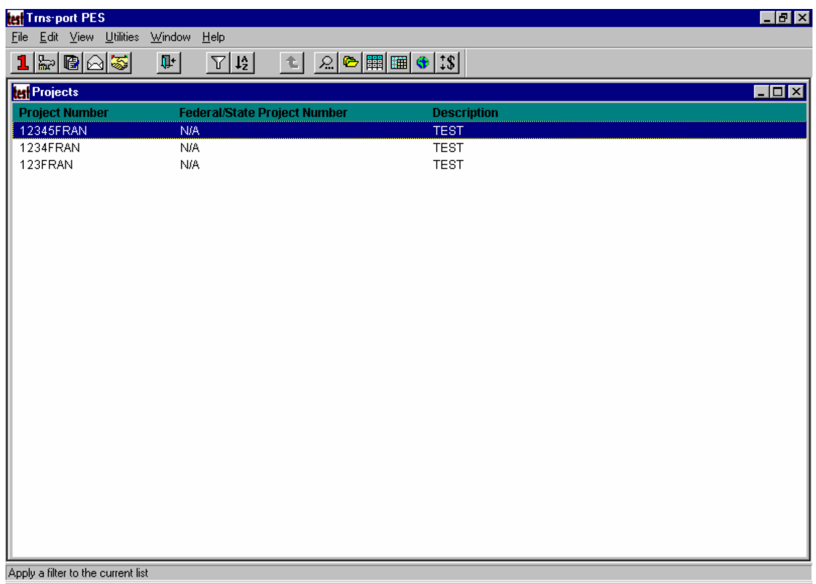
Value The information you type in the Value field is the filter criterion to match.

This illustrates a filter on the Projects List window, set to select on the Federal/State Project Number column, with the operator selected as =, and the Value set for N/A. This value will select Maintenance projects in this example.



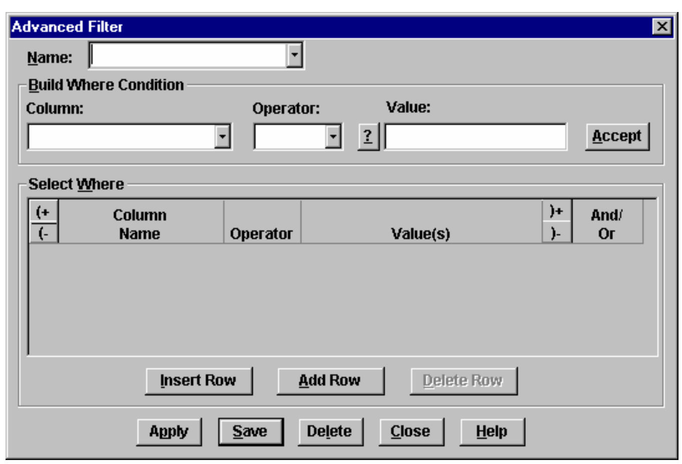
The resulting Projects List window appears.

If the selection results in a blank window, click the Filter button again, and then click Show All. This will restore the complete window list, and try again with different criteria in the operator field or a different value.



The Advanced Filter

You may also filter information using a more complex set of criteria. Click the Advanced button and Trns•port displays the Advanced Filter window. This window allows you to use multiple combinations of conditions to filter with various operators, values, and logical combinations.



Use the Advanced Filter window to build a set of conditions for Trns•port to use to filter information. This set of conditions consists of a series of “where conditions” combined with logical options, such as And/Or, (+ and (–. Create each where condition by choosing a value in each of the Column, Operator, and Value fields and then clicking the ACCEPT button.

Column The Column field contains the names of all the columns in the table from which the list window is built. When you click the down arrow in the column field, the list of columns to choose from will appear.

Operator The Operator field contains all the operators found in the basic filter plus Like and Not Like, operators used for pattern matching.

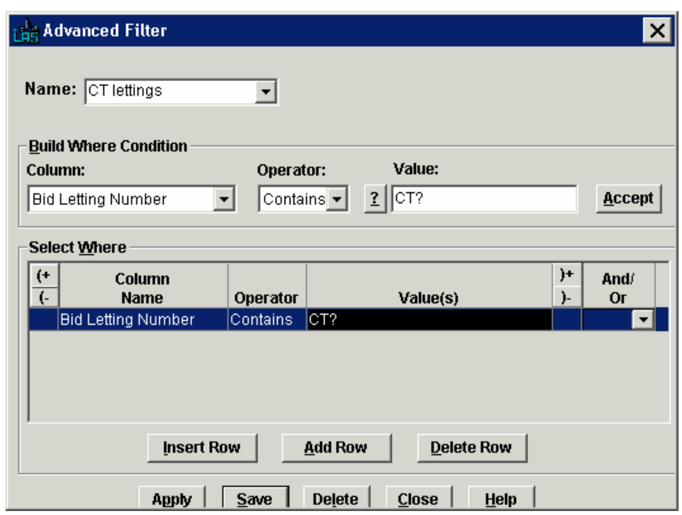
Value The information you type in the Value field is the filter criterion you are using as a delimiter or are trying to match.

Use "*" as a wild card to match any value or "?" to match a single character only with the LIKE or NOT LIKE operators. To search for a value that contains the characters "*" or "?", use the backslash character (\) just before the "*" or "?". For example, Quantity * item would search for Quantity * item. To search for the "\" character, put a backslash in front of the "\"; for example, use \\job to search for \job.

Trns•port displays each where condition in the Select Where area of the Advanced Filter window in the order in which you create them. After all of the where conditions you need for the filter are listed, combine them into a “where clause” by clicking in the And/Or column to the right of each condition line and selecting the appropriate option from the menu for each line. Typically, all lines requiring Or should be combined before the lines requiring And. Use the logical options (+ and (– to override the And/Or combinations where necessary.

To add the first row:

- Click or enter values for the **Column**, **Operator**, and **Value** fields at the top of the screen.



- Click the **Accept** button.

To add another row,

- Click the **Add Row** button,
- Click the row just added.
- Click or enter values in the **Column**, **Operator**, and **Values** fields.
- Click the **Accept** button.

Add parenthesis as needed and choose either **And** or **Or** as appropriate.

To save a filter:

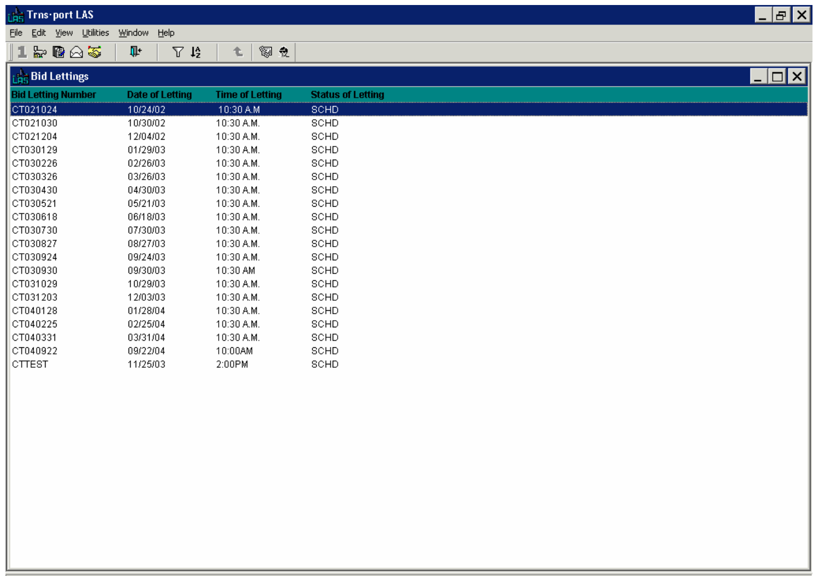
- Enter a name in the **Name** field.
- Click the **Save** button.

The filter will be available for future use.

This example is **Bid Letting Number**; **Contains; CT?**. This filter is named **CT Lettings**.

- Click the **SAVE** button to save the filter.
- Click **APPLY**

The results of this advanced filter appear.



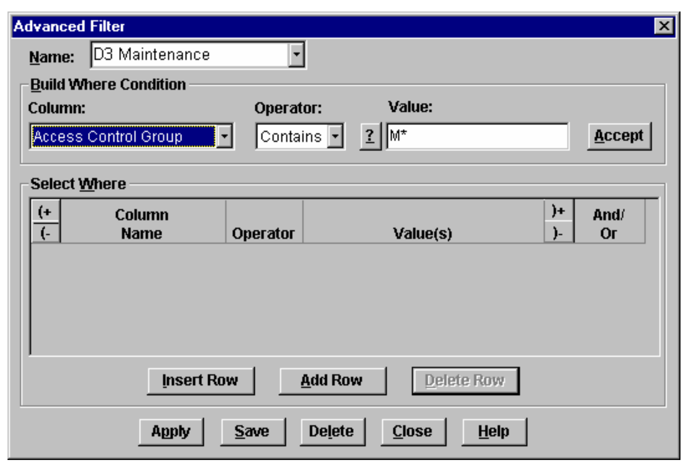
Reuse a filter.

This and other advanced filters may be re-used by:

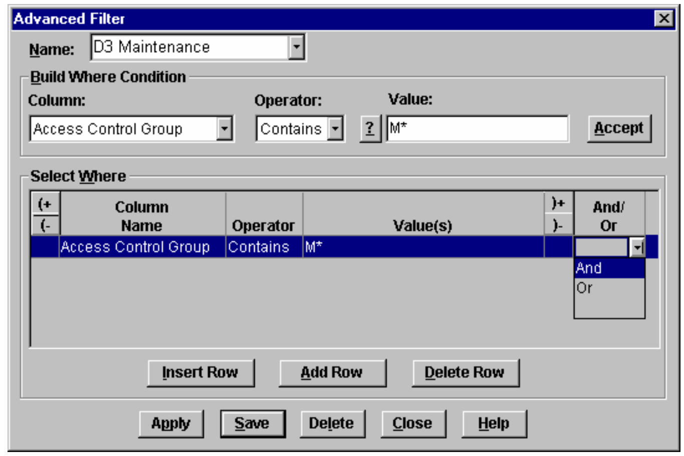
- Click the **Filter** Icon.
- Click the **ADVANCED** button.
- Click the down arrow in the **Name** field.
- Click the name of the filter.
- Click **APPLY**.

To build a filter that selects on Maintenance Projects in District 3, follow these steps:

- Create the first where condition by selecting values in each field
- Click the ACCEPT button.



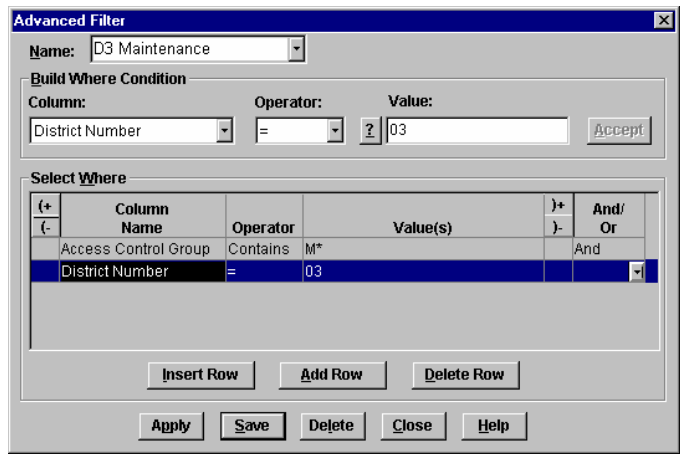
The information will be moved to the lower section as row one, and you may select **And/Or**. In this case select **And**.



- Click the ADD ROW button.
- Highlight the new row.

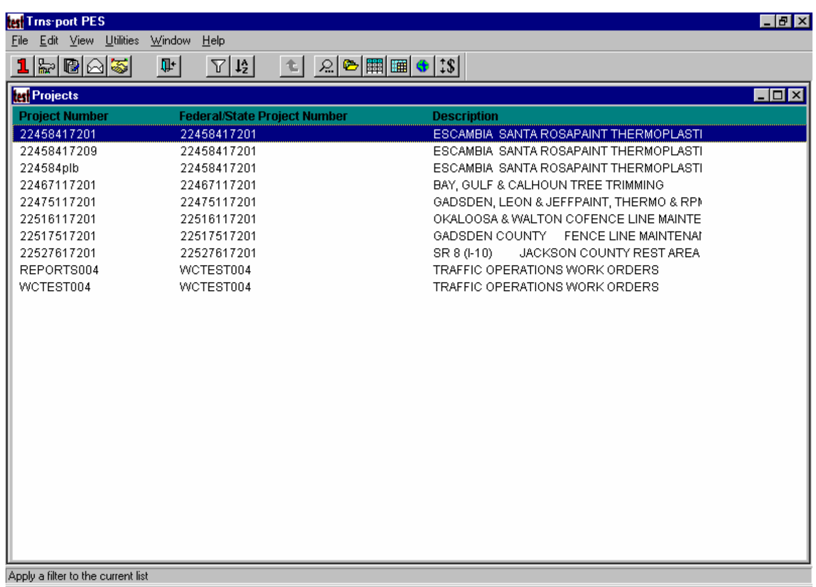
This makes the Build Where Condition window active for the new row.

- Create the second where condition as shown here.
- Click the ACCEPT button.



Name the filter you have built. In this example, the name given is D3 Maintenance. The name can be up to 30 characters long. Now that the filter is complete, click the SAVE button to save this filter so that you may reuse it in the future.

Click the APPLY button to see the results of this two-condition filter on the Projects List window, where it was built.

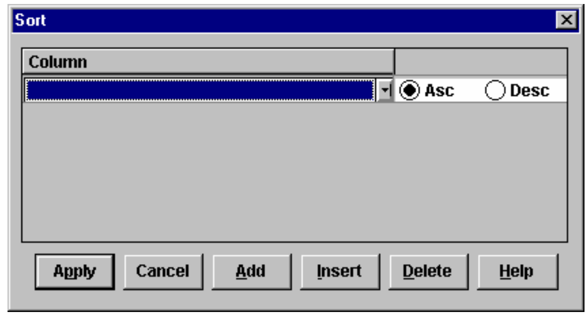


If the filter doesn't work the first time, reopen the advanced filter, click the name window to select and reopen the filter, and adjust condition statements that may be causing the problem. You may always restore a full list by clicking on Show All at the regular filter.

To use the filter again, select the filter name from the list box.

To remove the saved filter from the database, Click DELETE.

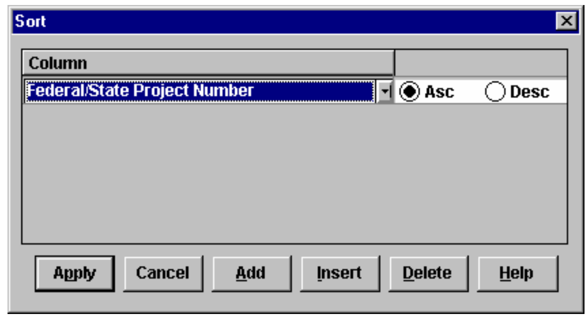
Sorting Information



To sort information in a list window, click the Sort button. It is located to the right of the Filter button. Trns•port displays the Sort window.

The Column field contains the names of all columns in the table that are used to build the list window. When you click the down arrow in the column field, the list of columns to choose from will appear.

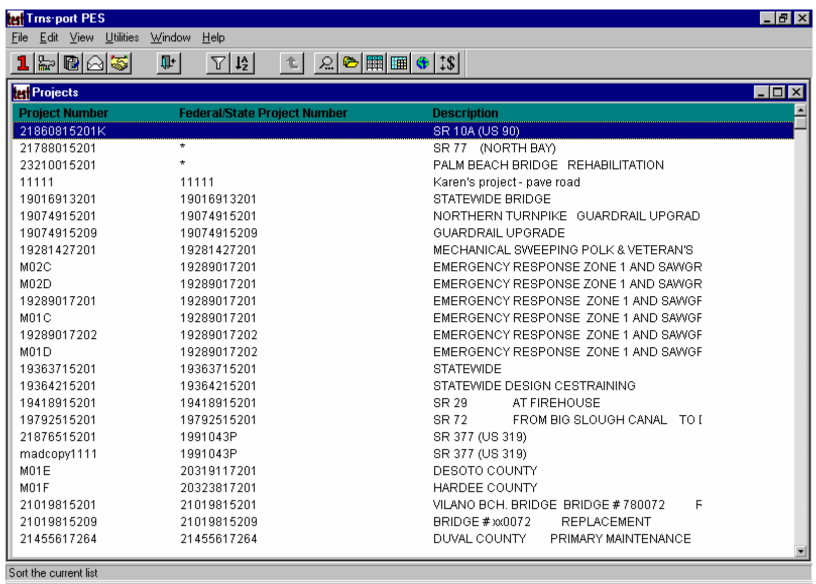
Click Asc or Desc to select an ascending (A-Z) or descending (Z-A) sort order for the selected column. When values containing both numbers and letters are listed in ascending order, numbers precede letters, and vice-versa for descending order.



In this example,

- Click the Federal/State Project Number.
- Click APPLY.

If you Click CANCEL, Trns•port returns to the list window without sorting the list window.



Trns•port sorts the rows in the order you specified. The results may be seen here.

Note that as in the Advanced Filter functions, the Sort functions may also be made complex. You may sort on different fields and establishing a sort order. You may add sort criteria by clicking the ADD button to add a row, and so forth.

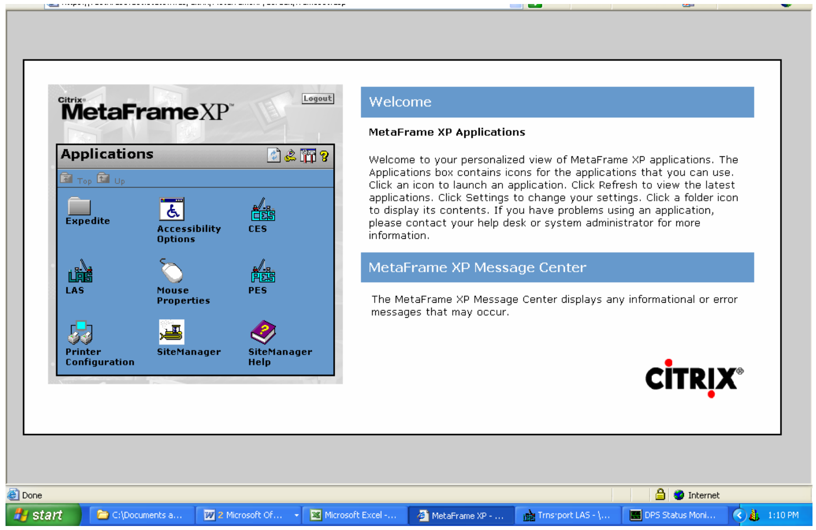
If you Click INSERT, Trns•port inserts another row for sort criteria before the currently selected row. If you Click DELETE, Trns•port deletes the currently selected row of sort criteria.

If you Click HELP, Trns•port displays a help window with information about sorting a list window.

One difference with Sort is that it must be set up each time you wish to use it. There is no naming or saving feature associated with it.

Appendix D Printing and Saving with Citrix Metaframe

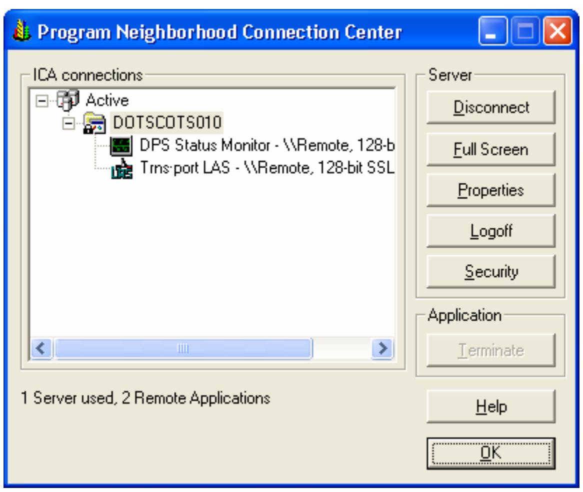
Use of the Citrix Metaframe server, requires certain setup for you to save the reports to the PC and for printing them to the network printer.



To set up access to the PC, Login to any Trns•port application. Access the task bar on the PC. As seen at the right.

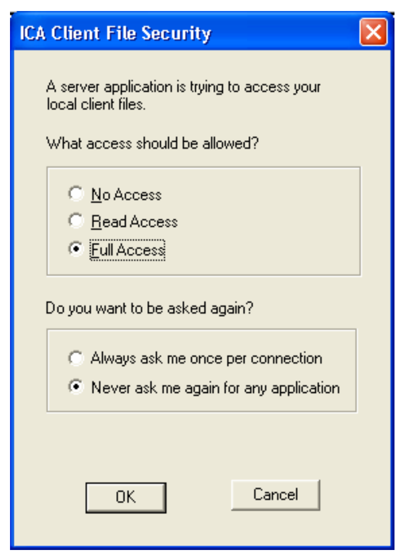
- Click the "**ICA Connections**"  Icon.

You will see that it near the clock.



When you Click the **ICA** Icon, you will see the ICA connection center as seen at the left

- Click the **Security** button.



The ICA Client File Security window will open.

- In the upper box Click **FULL ACCESS**
- In the lower box Click **NEVER ASK ME AGAIN FOR ANY APPLICATION.**
- Click **OK.**

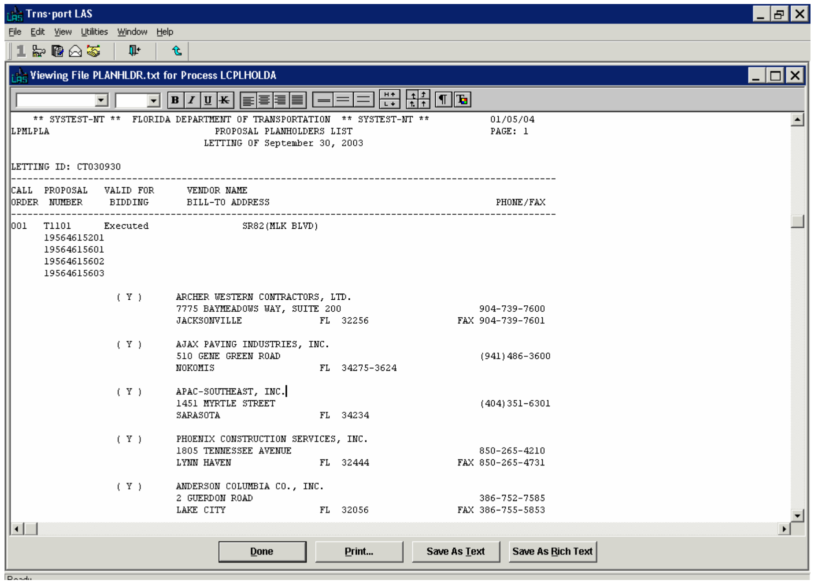
With this choice you may access the A drive or the C drive for any Trns•port application you work in.

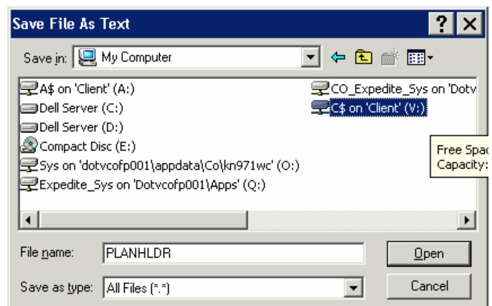
- Click **OK** on the ICA Connections window to complete the setup and close the ICA connection center**.**

You are now ready to save a report from Trns•port.

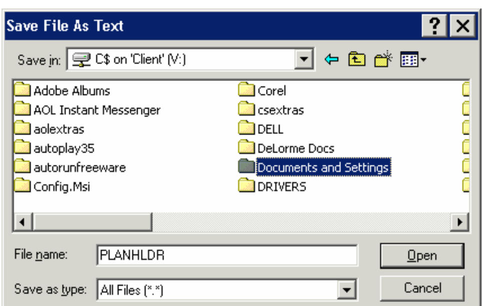
In the process list window open a report and it will appear similar to the one seen here.

- Click either the **Save As Text,** or **Save As Rich Text** button.

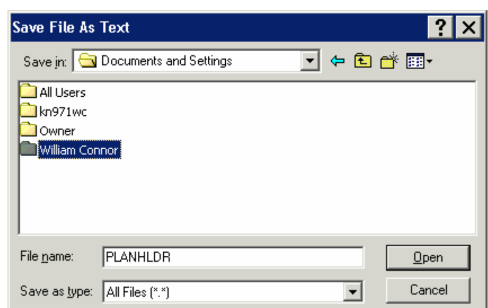




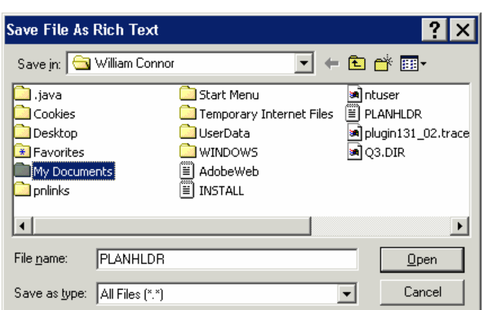
- Dblclick "**C$ on 'Client"(V:)**"



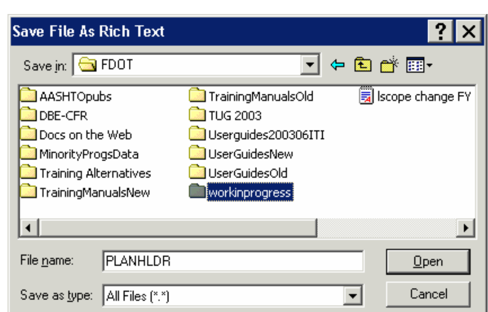
- Dblclick **Documents and Settings**.



- Dblclick the **Userid** or **Name**, depending on how your PC is set up.



- Dblclick **My Documents**.



You should now recognize the directory structure on your PC. When you reach the folder you seek,

- Click the OPEN button to save the file.