From Design to
Building a Proposal / Contract

AASHTOWare Project
Pre-Construction MANUAL

OKLAHOMA DEPARTMENT OF TRANSPORTATION

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Contents

1.0 Introduction to Projects

1.1 Overview – find a Project

This document is intended as a training guide to be used in conjunction with other materials to build a Project and send to OE for proposal.

To initiate building a Project in AASHTOWare Project Preconstruction, first log into the following site: <mark>(Any Web Browser)</mark>

1. Open up AASHTOWare Project

   - **For Production -** https://odot-pr-prod.infotechfl.com

   - **For Testing -** https://odot-pr-test.infotechfl.com

   - **For Training -** https://odot-pr-trn.infotechfl.com

2. Sign in using your Core ID and the Password for the AASHTOWare Project web page.

← NEW   OLD →
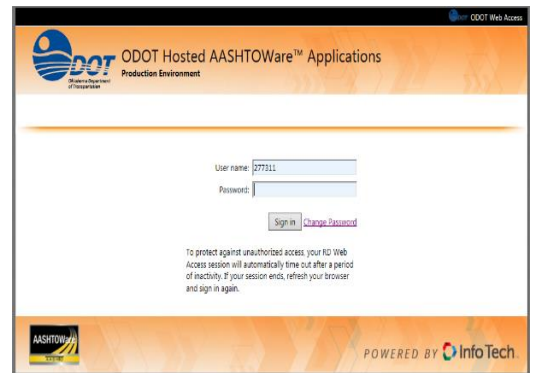
3. Once logged on, you will see your Dashboard.

4. You will see 2 components on the dashboard. One is Project Overview and Proposal Overview. Some Projects or Proposal may be listed on your dashboard.

   - **Note:** You can also go to the dashboard at any time by clicking the Home button on the Menu bar. Depending on the role you are given, you may see different components or links to assist you with your job.

5. Before we dive down please note the Help system provides a wealth of information immediately available to you while you work. Help is always indicated with a question mark in a circle on the Global Header or Component Headers.

   a. On your dashboard, there is global help link, which takes you to the start, with Help for New Users.


And Or

b.   The Help system is *context sensitive*, which means that when you click the **Help** button   on a component in the software, the system provides information about the functionality of that component only. Each Help page provides links to other Help pages containing related information.
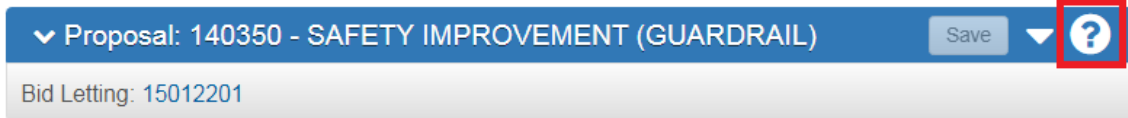
c.   Use the help link when you have questions about the purpose of the page, page actions or field definitions. The Search pane provides a rapid full-text search of all the topics in the Help system. To display the Search pane from any Help page, click the **Search** button in the top left corner next to the **Contents** button. To perform a search, type your search criteria in the **Search** input field on the toolbar, and click the **Go** button. To search for a phrase, enclose the phrase in quotes in the **Search** field.
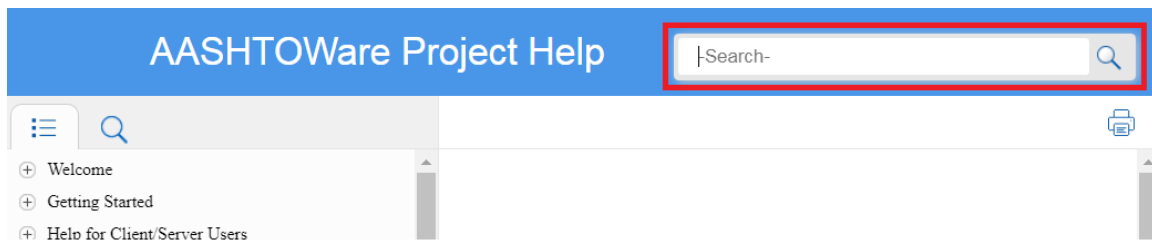
6.   Now that we are done with the the Help/Reference matials lets continue on. Going back to your Dashdoard and from the Project Overview Component, you may see a list of Projects.
If no Projects appear on the page, click on the button Show first 10.

7. A Quick Find search box is standard on each component that contains a list. It searches all rows in the list for a string of text and then displays only rows with fields containing that string. For example, on the Project list, if you search for Bridge, it will bring up Projects that have Bridge in the Project ID or Project Description.

8. Click in the Quick Find search box for a list that you want to filter. Type the string of characters you want to match or use as a delimiter. The Quick Find filter is not case-sensitive. To filter or find specific projects, start typing any of

displayed values in the Quick Find search box, such as Project Id, Federal Project Number or Description. Below is a quick search for NHPPI, which lists all the projects with that in the Federal Project Number.

9. [**Note:** Beside the quick find search is an advanced search feature which allows you to create and save custom sorts and filters on multiple criteria. Sorts and filters can be based on both visible and hidden fields for a Project.
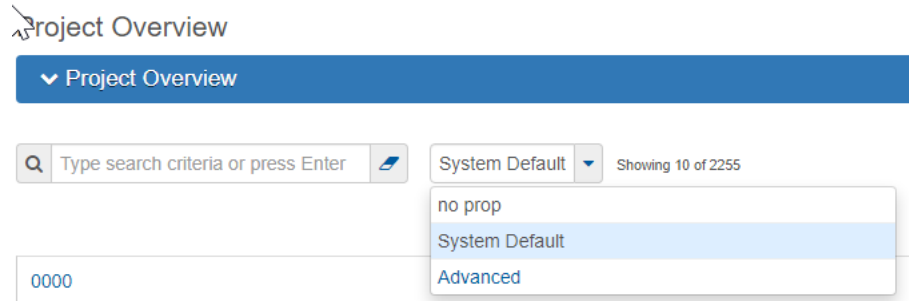
For example, an advanced filter to display only the Projects in Division 03000 could be entered. You can name and save this filter or apply the filter without saving.
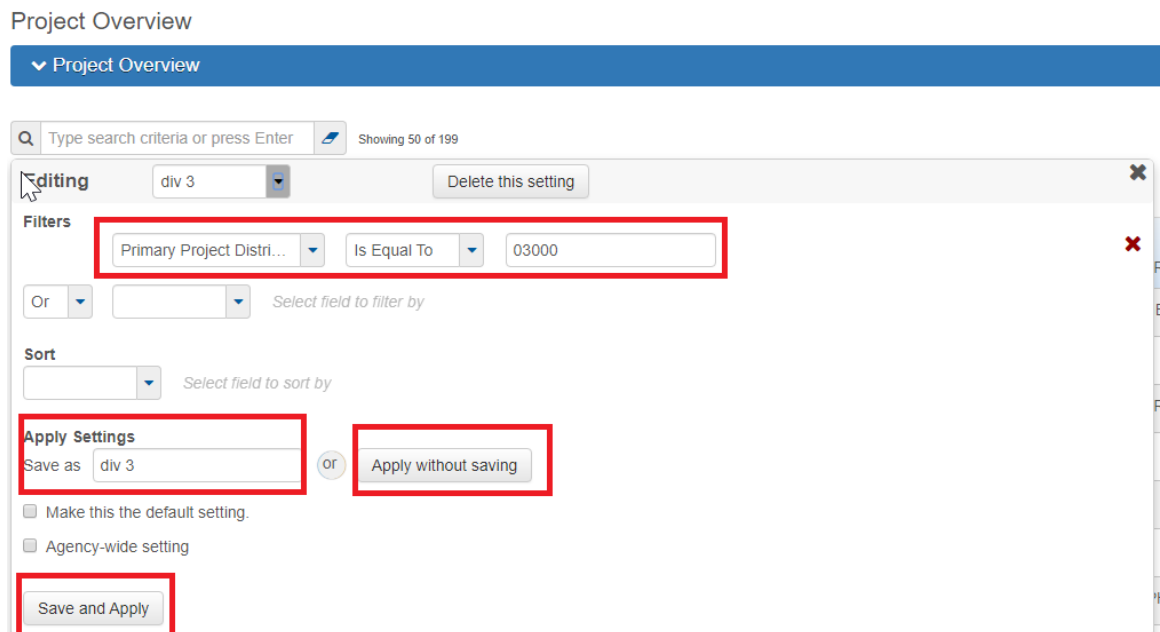
10. This would result in a list of only project whose primary division is 03000.

Project Overview

Project	Fed Proj Num	Type	Descr
0196406	ACSTP-144C(001)SS	FED - FEDERAL PROJECT	GRADE, DRAIN, SURFACE, AND BRIDGE
1754304	CIRB-135C(020)RB	SAP - STATE AID PROJECT	GRADE, DRAIN, SURFACE, BRIDGE, AND EROSION CONTROL.
1886504	STP-163B(075)UR	FED - FEDERAL PROJECT	RECONSTRUCT - ADD LANES
2026607	STP-114B(108)SS	FED - FEDERAL PROJECT	GRADE, DRAIN, SURFACE, AND BRIDGE - DIVISION III
2031704	NHPP-215N(014)SS	FED - FEDERAL PROJECT	BRIDGE AND APPROACHES
2099704	STP-114C(111)SS	FED - FEDERAL PROJECT	GRADE, DRAIN, AND SURFACE
2099718	ACSTP-214C(044)SS	FED - FEDERAL PROJECT	BRIDGE AND APPROACHES
2100709	NHPPI-4000-(100)PM	FED - FEDERAL PROJECT	PAVEMENT REHABILITATION (ASPHALT)
2178804	STP-163C(165)SS	BR - FEDERAL BRIDGE REPLACEMENT	WIDEN AND RESURFACE
2178811	STP-263C(027)RW	FED - FEDERAL PROJECT	RIGHT-OF-WAY CLEARANCE - DIVISION III
2178904	BRFY-132C(077)	BR - FEDERAL BRIDGE REPLACEMENT	BRIDGE AND APPROACHES
2184107	STPY-162B(187)	FEDP - FEDERAL AID PRIMARY	WIDEN AND RESURFACE
2213904	STPG-114A(141)AG	FED - FEDERAL PROJECT	ENHANCEMENT (STREETSCAPE)

11. Once the desired project pulls up, click on the Project ID link to open the Project.

PROJECT Pre-Construction Design User ODOT

Project Overview

Project	Fed Proj Num	Type	Descr
0903217	NHPPI-0240-1(358)004SS	FED - FEDERAL PROJECT	GRADE, DRAIN, AND SURFACE
0903219	NHPPI-3500(012)RW	FED - FEDERAL PROJECT	RIGHT-OF-WAY CLEARANCE - DIVISION IV
0903220	ACNHPPI-2400-(004)SS	FED - FEDERAL PROJECT	GRADE, DRAIN, AND SURFACE
0903316	ACNHPPI-2350-(004)SS	FED - FEDERAL PROJECT	GRADE, DRAIN, SURFACE AND BRIDGE
0903325	ACNHPPI-2350-(005)SS	FED - FEDERAL PROJECT	GRADE, DRAIN, SURFACE, AND BRIDGE
0903327	NHPPI-2350-(009)PM	FED - FEDERAL PROJECT	GRADE, DRAIN, SURFACE, AND BRIDGE
1061807	NHPPI-4000-(248)FP	FED - FEDERAL PROJECT	GRADE, DRAIN, SURFACE, BRIDGE, AND APPROACHES
1742889	ACNHPPI-XTWN(079)SS	FED - FEDERAL PROJECT	GRADE, DRAIN, AND SURFACE
1957605	NHPPI-3500-(081)PM	FED - FEDERAL PROJECT	BRIDGE AND APPROACHES

If your project showed up skip this section. To add a project that does not exist continue.

1.2 Adding a Project

You can create new projects by:

- Importing from Estimator

- Copying an existing project (Section 1.2.2)

- Adding a new project (Section 1.2.1).

If a project has been created in Estimator, the files will be loaded to Preconstruction by the Construction Program Office.

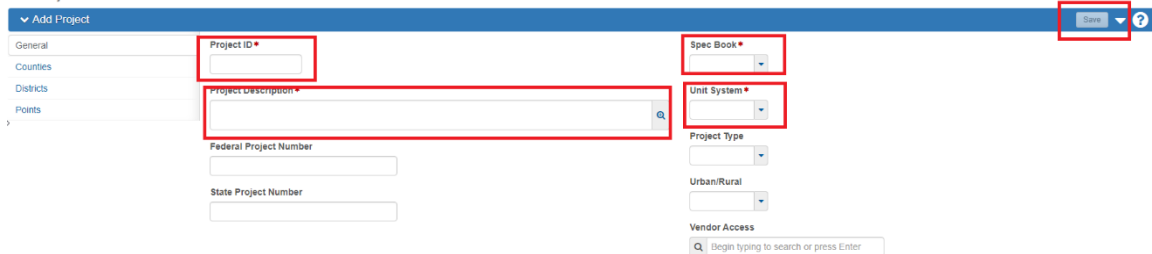You can create a new Project from the Project Overview component.

1.2.1 Click the Component Actions button and click Add.

1. An Add Project screen will be displayed. Enter the Project ID, Project Description, Spec Book and Unit System.

3.3.

2. Save the Project.

1.2.2 Once saved, a Project Summary page will be displayed with more visible fields and tabs.

1.3 Copy an Existing Project

If you are setting up a new project that is similar to an existing project, you can save time by creating a copy of the existing project and assigning it a new Project ID. You can then make any changes required for the new project.

1. From the Project Overview component, search for the project to copy.

2. Click the component Actions button for the selected project and select the Copy action.
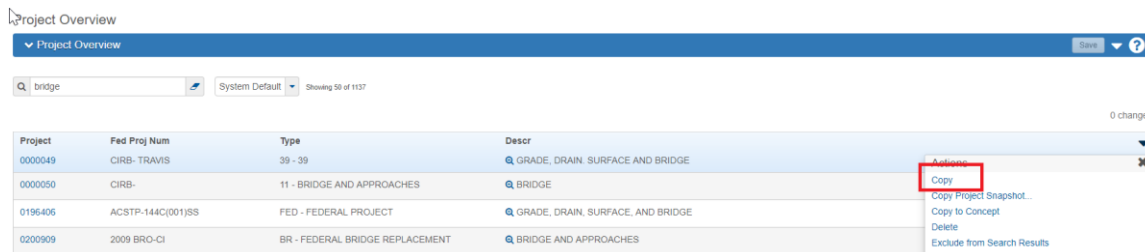
3. In the New Project ID field, delete the current value and type the new Project ID.

4. Click the Copy Button.
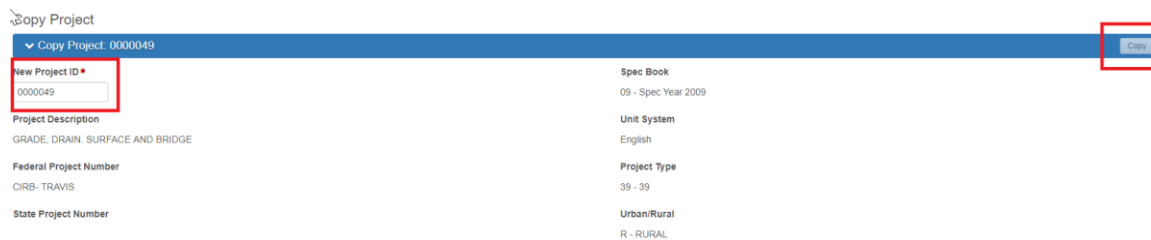
5. Your new project has been created. The Project Summary page will be displayed and a green banner will indicate your new project has been saved.
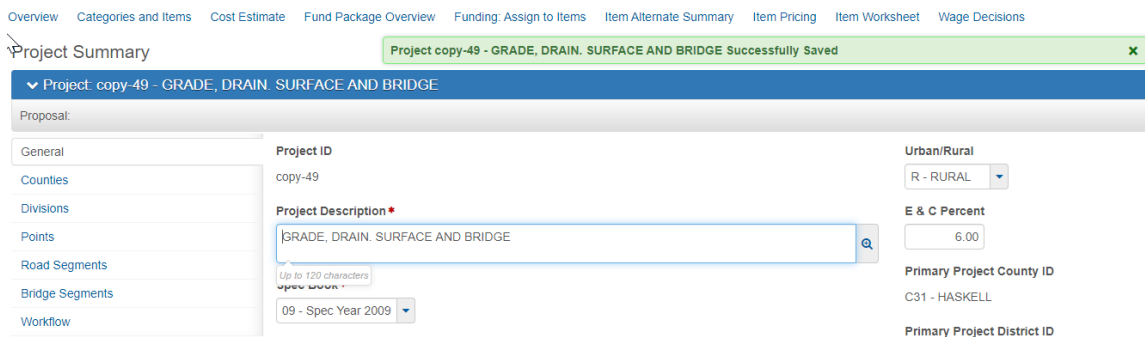
6. If you do not get a green banner, some of the data in the original project may be obsolete. Contact your system administrator if this occurs.

Overview

Copy Project

Error: No rows saved; detected rows with errors. Please review messages below.
- County is obsolete and cannot be used. ✕

❯ Copy Project: 0000-copy

1.4 Setting Workflow Phase

Before we can enter in Project information we need to make sure the project is in the correct workflow. A workflow is a way to control access to a Project or Proposal throughout its lifecycle. Each phase in a workflow can set up different access to a particular role.

1. The Workflow tab is the last tab on the left side of the Project summary.

2. When you receive a project or create a project, if the workflow phase is not already set, you will set the workflow phase to ODOT Workflow and QAQC/Design. Phase.

Project Summary

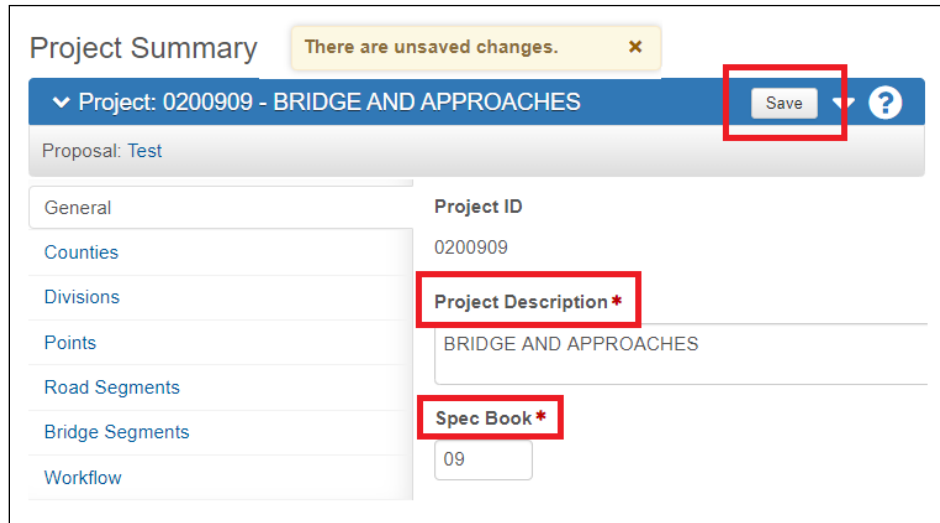| ∨ Project: 2423920 - DIVISION 4 BRIDGE PAINTING |
|---|
| Proposal: |

General	Workflow
Counties	ODOT Workflow ▾
Divisions	WorkflowPhase
Points	Consultant Upload, XML upload / Built the Project / Estimation ▾
Road Segments	
Bridge Segments	
Workflow	

1.5 Entering Project Information

Once a Project has been selected, the Project Summary component is displayed, and the General Tab data will be open. Depending on your selected role, you can view or change basic information about the Project.

1. Every field with a red star * is mandatory and must be completed. After entering the data on the General tab, click Save. If there are no errors, you should receive a Save Complete message in a green box.
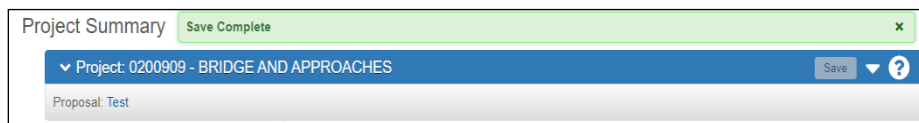
Note: Project ID is Proposal Generator Key & Project Work Type & Fed/State # is the Proposal Generator Key

2. Each tab on the left side of the page contains additional Project location information. Continue completing the information for each tab as described below.

1.6 Adding a Project County

To record the county location(s) in which the Project work is to be performed, you need to add county records. Click on the second tab (Counties) on the left side of the Project Summary page. To add records:

1. Click the New button to open a new record.

2. Start typing the County name. After 3 characters have been entered, selections will appear or press Enter to see the first 10 records. Select the desired county(s).

3. Fill out the percent (pct.) of the counties. Mark the primary county and click Save.

1.7 Adding a Division

To record the division location(s) in which the Project work is to be performed, you need to add Division records. Click on the third tab (Divisions) on the left side of the Project Summary page. To add records:

1. Click the New button to open a new record.

2. Start typing the Division after 3 characters have been entered, selections will appear or press Enter to see the first 10 records. Select the desired division(s).

3. Mark the primary division and click Save.

1.8 Adding Points

A Project Point is a location that can be described by a single longitude and latitude measurement. The midpoint of a project will be entered as a point.

1. Click the New button.

1. Type will be defaulted to Midpoint. Add the Latitude and Longitude coordinates.

2. Add a Description and click Save. You can only have one midpoint record per project.

    Note: Description is Proposal Generator Key

1.9 Adding Road Segments

A road segment is a portion of the road that can be described by starting and ending points. A name and description should be entered to identify the segment.

1. To add a Road segments, click the New button.

2. After entering data for the required fields, click Save.

Note: ALL Road Segment Lane Mile is Proposal Generator Key

1.10 Adding Bridge Segments

A bridge segment is a bridge or portion of a bridge that can be described by a set of starting and ending measurements.

1. To add a Bridge segments, click the New button.

2. Add the Bridge ID and Description and click Save.

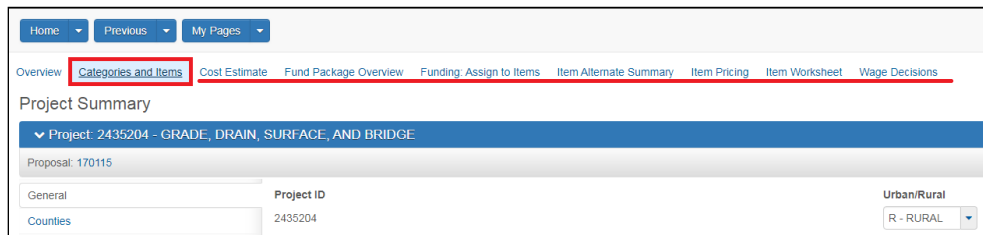   Note: ALL Bridge Segment Length is Proposal Generator Key

2.0 Adding Project data, - categories and items

The Project Category and Item Summary component contains all the work item information for the project and allows you to organize them into categories and alternate sets.

2.1   Categories and Items Tab

Categories are used to separate the item of work into specific groups making it easier to work with large numbers of items.

1. Click the Categories and Items quick link at the top of the Project Summary.

A new component page will be displayed with 4 tabs on the left side.

2. The General tab should have the same project information as the general tab on the Project Summary.

3. Click the Categories tab. Enter Category ID, Description and E&C Percent.

4. Make sure that the construction Eng. Pct. or **(E & C percent) is 6.00%** for all categories **except staking in which case it's 0.00%**. Fill out any additional information.

Project Category and Item Summary

5. To Add a new category, click the New button. Add data to fields.

6. Click Save.

2.2   Category Alternate Sets

Some projects might contain a choice of two or more ways to accomplish the work or a piece of the work. The different ways to accomplish the work might require different work items or groups of work items. For example, a paving project might allow a choice between asphalt and concrete, or bridge construction might involve a choice between two designs, each requiring a different set of supplies.

For this reason, two or more groups of items can be identified as alternate means to accomplish a given project need. The need is indicated by defining a category alternate set.

Category Alternate Sets consist of multiple items grouped together to meet a particular project requirement in a given way. The requirement is defined as a Category Alternate Set, and each member of that set is a category containing the group of items required.

For example, a Category Alternate Set named 'Paving' might contain two categories, one consisting of the items needed to provide asphalt paving, and the other consisting of items needed to provide concrete paving. The 'Asphalt' category would contain the items needed for asphalt paving, such as aggregate and seal coat. The 'Concrete' category would contain the items needed for concrete paving, such as concrete and joint sealant. Each type of paving is an alternative to the other type.

The different ways to accomplish the work requires different groups of work items, indicated by defining an alternate set.

1. To Add a Category Alternate Set, click the Category Alternate Set tab.

2. Click the New button.

3. Enter the Set ID and Alternate Description.

4. If you want to use the Life Cycle Cost, set the Life Cycle Cost Indicator checkmark to TRUE (checked).

5. Click Save.

2.3 Adding/Editing Item or Items

The items tab contains an accordion list of all the items in a project. There are 3 different ways to add an item from this tab: add items individually, add multiple items or use the quick add functionality.

The next section 2.4 will discuss viewing and editing items via the worksheet.

1. To add items via the tab, click the Items tab. If there are already items associated the Project, they will be displayed in an accordion list.

2. To add a new item to the Project, Click the New button.

3. To Edit an existing item, click the Expand/Collapse button.

4. Verify or change the Item ID and/or Category ID or any other fields that require changes.

5. Click Save
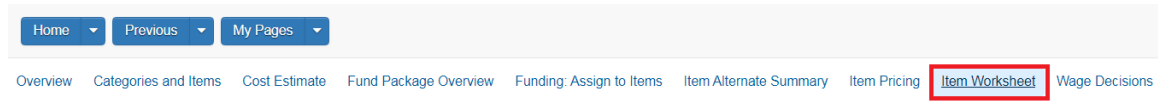
2.4 Project Item Worksheet

The Project item worksheet is another view of the Project items in a read-only grid view. You can edit specific cells by clicking in the cell.

To get to the Project Item Worksheet click the Quick link at the top.

Once there you will see the following.

Edible fields on this page are:
- Category ID
- Item
- Quantity
- Price
- Supplemental Description

2.5 Funding

A fund package is used to group multiple funding sources for one or more project items and to define that grouping with an identity or name. It is a method for identifying complete funding allocations for items within a single grouping.

A project may contain one or multiple fund packages. Each item in the project is assigned to a single fund package, which provides all the funding necessary for that item.

Click on the Fund Package Overview Quick Link at the top of the page. The Fund Package Overview component contains a list of all the fund packages associated with a project.

Overview   Categories and Items   Cost Estimate   Fund Package Overview   Funding: Assign to Items   Item Alternate Summary   Item Pricing   Item Worksheet   Wage Decisions

This page is for you to select the financial parties involved in the funding of the contract/proposal. **You will assign items/categories in the next step.**

Fund packages will be pre-defined as reference data. When you create a new recorded by selecting a reference fund package, all of the funds listed in the reference fund package are copied to the new fund package for the project.

Use the Default Funding Package for the whole Project.

Note: Funding is Proposal Generator Key

1. Click the Select Fund Package Button. In the search bar, start typing your fund package name. Click "Show First 10"

2. Once you have found the correct one, click on it and get a check mark.

3. Click Add Fund Package.
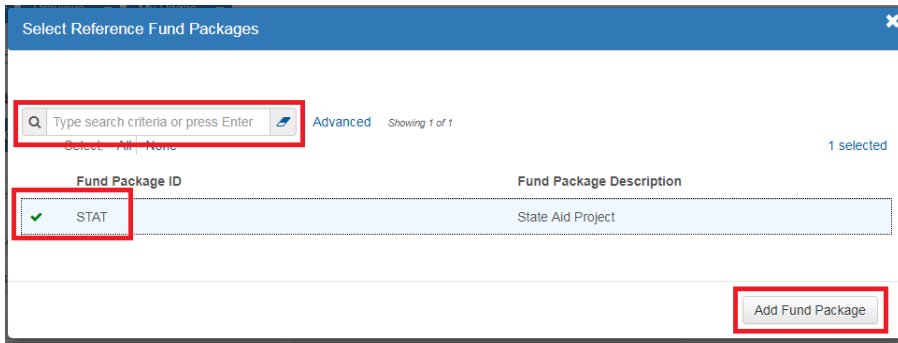
4. To get to the funding information on a specific Fund Package, click on the blue link under the Funds field on the Fund Package Overview.

5. On the Fund Package Summary component, you will see information for a different fund package by clicking the **Fund Packages** box on the subheader, and then selecting the fund package in the list. You can also scroll through all the fund packages using the arrow buttons on the right side of the subheader

6. The lower part of the Fund Package Summary component displays a rolling list of the funds in the selected fund package. Each row represents one fund record. Each row displays an **Actions** menu and current values for the fields listed below. To maintain a fund record, click anywhere in that fund's row. The system highlights the row in blue and displays information in labeled fields.

7. Click in a field and add, change, or delete information as needed.
   You can view or change information in these fields:

- Fund ID
- Priority
- Fund Description
- Fund Type
- Percentage
- Fund Limit
- Accounting Fund
- Funding Group

Fund Package Summary

2.6 Assigning the Funding to Items

Each item in a project must have one fund package assigned to it. Once you have created or selected Fund packages, you will now assign those packages to the project items.

1. Click the Funding: Assign to Items quick link at the top of the page.

2. Use the radio buttons to select what categories get funded and by what fund package. Each radio button applies to a specified fund package. The fund packages are listed at the right. The categories are listed on the left.

3. When you are done, click Save and then click the Project quick link.

2.7   Adding Wage Decisions

Wage decisions include federal, state, or local rules dictating the wage rates contractors must pay their employees for work on agency contracts. Wage decisions are recorded at the project level. The Project Wage Decision Overview contains all the wage decision information for the project.

1. Click on the Wage Decisions quick link at the top of the Project Summary, the Wage Decision Overview page will be displayed.

2. Click the Select Wage Decisions button to view the wage decisions.

3. Select the wage decisions to add to this project, then click Add to Project.

Note: Wage Decisions are Proposal Generator Key

2.8   Validate Project

Projects have a validation process that generates a list of warnings about the state of the project. These warnings do not stop further processing.

1. Go to the Project Summary page by using the Quick Link: Project

2. From the Component Action Menu, run the Validate Project Process.
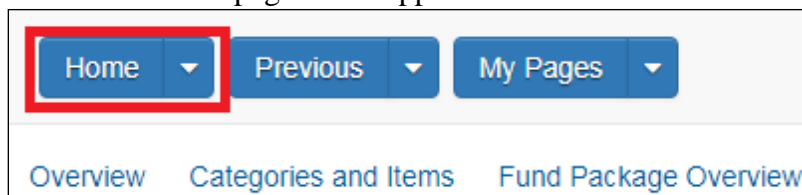

3. If it passes, you will get a Project is valid message. If it fails, the reasons will be outlined on the page. Fix the issue and rerun the process until Project is valid.

You are now finished with the Project data.

Go to the HOME page in the upper-left corner. You will be directed to the Dashboard.

2.9   Locking a Project

You can lock a project record so that no other user can make changes to it while you are working. Locking the project locks all of its related information, including items, locations, funding, and so on. While a project is locked, the system displays all project information in read-only form to all other users.

The Project is locked by 'ODOT\117138' with a reason of: Project is locked from Project.

1. <u>**While you are entering item information for a Project, you may want to lock the Project for other users.**</u>

2. To lock a project, locate the project you want to lock in the Project Overview component, and select **Lock Project** from the **Actions** menu in the project row.

3. The system displays a banner at the top of the page indicating that the project is locked.

4. <u>**Make sure to unlock the project when you have finished making changes, select Unlock from the Actions menu.**</u>

Note: Depending on how your agency has set an agency option, locking a project that is associated with a proposal might also lock the proposal and any other projects associated with that proposal.

2.10 Changing Workflow Phase

A *workflow* is a set of relationships between tasks and the order in which those tasks are performed throughout the lifecycle of an agency project, proposal, or contract. For example, if your agency's projects for new roadway construction consist of different activities, steps, and milestones than those found in roadway maintenance projects, the different kinds of projects would have different workflows.

The different activities, steps, and milestones contained in a workflow are separated into logical parts called *phases*. Each phase occupies a relative position in the workflow's sequence of activities.

As a user, it is important to understand which phases apply to the work that you do, and when to change the phase. Security constraints can be associated with phases, so that your access can be denied or restricted during certain phases. You might find that you can no longer make changes to, or even view, a project or proposal after you progress it to a certain phase.

1. Once you have completed all your Project information and are ready to have your project reviewed / Sumitted to OE, change the workflow phase to OE Review.

At this point, you will have view only access to this Project

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