

From Design to Building a Proposal / Contract

AASHTOWare Project Pre-Construction MANUAL

OKLAHOMA DEPARTMENT OF TRANSPORTATION

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Contents

From Design to Building a Proposal / Contract	i
1.0 Introduction to Projects	1
1.1 Overview – find a Project	1
1.2 Adding a Project	8
1.3 Copy an Existing Project.....	10
1.4 Setting Workflow Phase.....	12
1.6 Adding a Project County	14
1.7 Adding a Division	15
1.8 Adding Points.....	16
1.9 Adding Road Segments	17
1.10 Adding Bridge Segments	18
2.0 Proposal Preparation	19
2.1 Categories and Items Tab.....	19
2.2 Category Alternate Sets.....	21
2.3 Adding/Editing Item or Items.....	22
2.4 Project Item Worksheet.....	23
2.5 Funding.....	24
2.6 Assigning the Funding to Items.....	27
2.7 Adding Wage Decisions.....	28
2.8 Validate Project.....	29
2.9 Locking a Proposal.....	30
2.10 Changing Workflow Phase.....	31
3.0 Proposal Creation	32
3.1 Creating Proposal from a Project.....	32
3.2 Find Proposal.....	34
3.3 Entering Proposal Information	35
3.4 Projects Tab.....	36
3.5 Proposal Sites (Time)	37
3.6 Special Provisions.....	40
3.7 Proposal Sections	45
4.0 Bid Letting	47
4.1 Adding a Letting.....	47
4.2 Assigning a Proposal to a Letting.....	49
4.3 Adding Purchases (Planholders)	51
5.0 Reports & Process:.....	53
5.1 Printing the Estimates	53
5.2 Proposal Generator Information.....	55
5.3 Run the Proposal Generator 1 of 3 ways.	56
5.4 Viewing and Printing the Proposal output	62

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: **(Any Web Browser)**



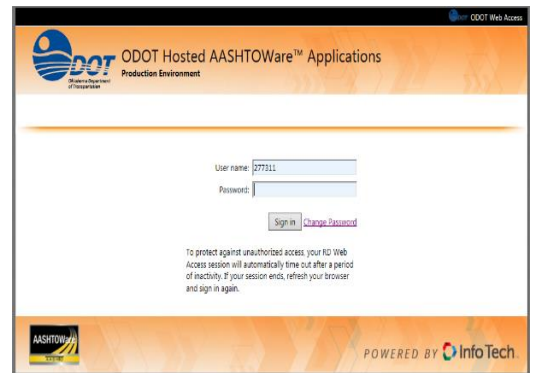
1. Open up AASHTOWare Project
 - **For Production** - <https://odot-pr-prod.infotechfl.com>
 - **For Testing** - <https://odot-pr-test.infotechfl.com>
 - **For Training** - <https://odot-pr-trn.infotechfl.com>

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



277311
.....
ODOT

← NEW OLD →



3. Once logged on, you will see your Dashboard.

The screenshot displays a dashboard interface. At the top, there is a navigation bar with buttons for 'Home', 'Previous', and 'My Pages', each with a dropdown arrow. To the right are 'Actions', 'Help' (with a question mark icon), and 'Log off' (with a power icon). Below this, the text 'On this page: Project Overview Proposal Overview' is visible. The main heading is 'PROJECT Pre-Construction Design User ODOT'. A blue bar contains 'Project Overview' with a dropdown arrow, a 'Save' button, and a question mark icon. Below this is a search bar with the placeholder 'Type search criteria or press Enter' and an 'Advanced' link. To the right, it says '0 changed'. A link 'Enter search criteria above to see results' is followed by 'or Show first 10'. Another blue bar contains 'Proposal Overview' with a dropdown arrow and a question mark icon. Below this is another search bar with the same placeholder and a 'System Default' dropdown menu. To the right, it says '0 changed'. A link 'Enter search criteria above to see results' is followed by 'or Show first 10'.

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.

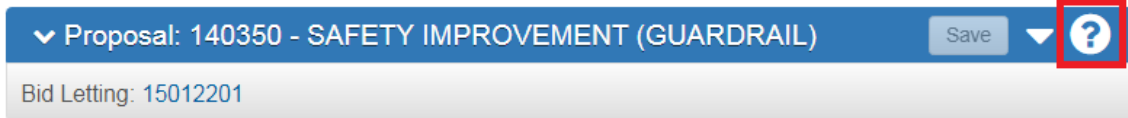
This is a close-up of the navigation bar from the dashboard. It shows the 'Home', 'Previous', and 'My Pages' buttons on the left. In the center, there is an 'Actions' button with a dropdown arrow. To its right is the 'Help' button, which features a question mark icon in a circle and is highlighted with a red rectangular box. Further right is the 'Log off' button with a power icon.

And Or

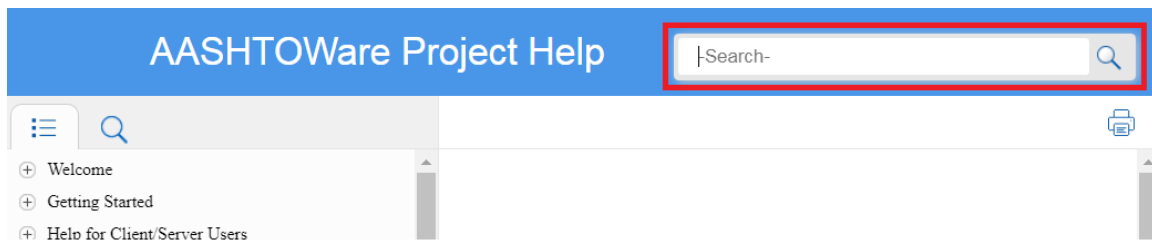


- b. The Help system is *context sensitive*, which means that when you click the **Help** button on a component in the software, the system provides information about the functionality of that component only. Each Help page provides links to other Help pages containing related information.

Proposal Summary



- 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.

Home Previous My Pages

On this page: Project Overview Proposal Overview

PROJECT Pre-Construction Design User ODOT

Project Overview

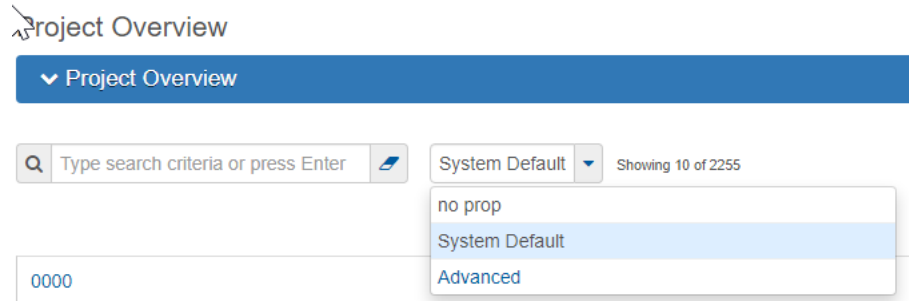
Q bridge System Default Showing 50 of 1137

Project	Fed Proj Num	Type	Descr
0000049	CIRB- TRAVIS	39 - 39	Q GRADE, DRAIN, SURFACE AND BRIDGE
0000050	CIRB-	11 - BRIDGE AND APPROACHES	Q BRIDGE
0196406	ACSTP-144C(001)SS	FED - FEDERAL PROJECT	Q GRADE, DRAIN, SURFACE, AND BRIDGE
0200909	2009 BRO-CI	BR - FEDERAL BRIDGE REPLACEMENT	Q BRIDGE AND APPROACHES
0200910	CIRB-131 2009	11 - BRIDGE AND APPROACHES	Q BRIDGE AND APPROACHES
0475705	STP-209C(067)PM	FED - FEDERAL PROJECT	Q GRADE, DRAIN, SURFACE, AND BRIDGE
0637714	ACNHPP-122N(052)PM	FED - FEDERAL PROJECT	Q GRADE, DRAIN, SURFACE AND BRIDGE
0637720	ACNHPP-222N(024)SS	FED - FEDERAL PROJECT	Q GRADE, DRAIN, AND BRIDGE
0903316	ACNHPP-2350-(004)SS	FED - FEDERAL PROJECT	Q GRADE, DRAIN, SURFACE AND BRIDGE
0903325	ACNHPP-2350-(005)SS	FED - FEDERAL PROJECT	Q GRADE, DRAIN, SURFACE, AND BRIDGE

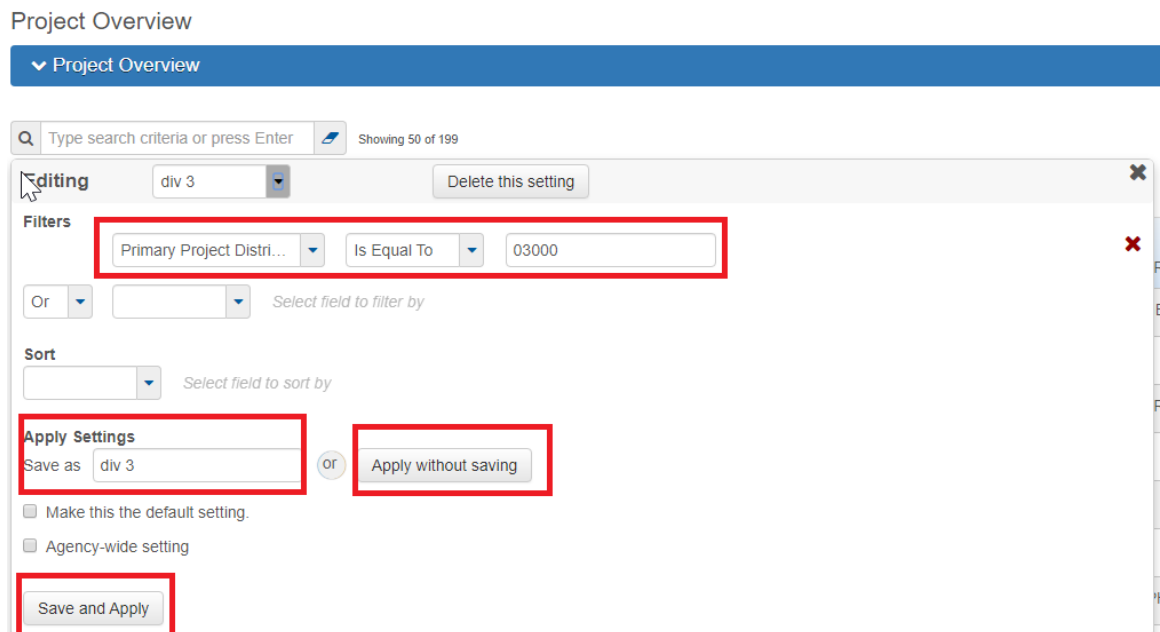
8. Click in the Quick Find search box for a list that you want to filter. Type the string of characters you want to match or use as a delimiter. The Quick Find filter is not case-sensitive. To filter or find specific projects, start typing any of

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 Overview

Q Type search criteria or press Enter Showing 50 of 199

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.

[Home](#) [Previous](#) [My Pages](#)

On this page: [Project Overview](#) [Proposal Overview](#)

PROJECT Pre-Construction Design User ODOT

Project Overview

Q Showing 50 of 114

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.

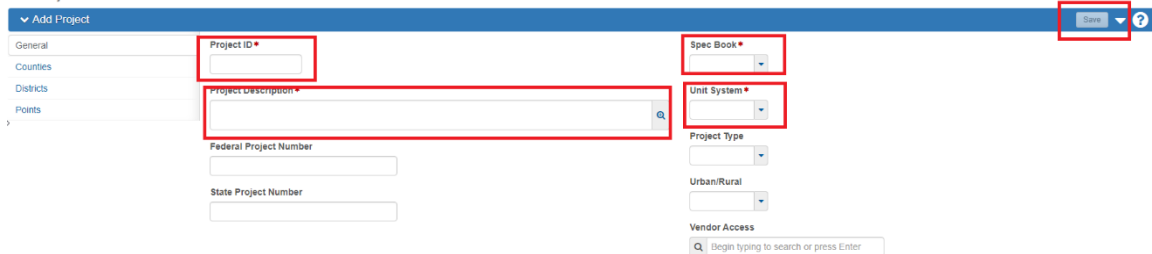
1.2.1 Click the Component Actions button and click Add.



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

3.3.

Add Project

A screenshot of the 'Add Project' form. The form has a blue header with a 'Save' button. On the left, there is a sidebar with navigation options: 'General', 'Counties', 'Districts', and 'Points'. The main form area contains several input fields: 'Project ID *', 'Project Description *', 'Spec Book *', 'Unit System *', 'Federal Project Number', 'State Project Number', 'Project Type', 'Urban/Rural', and 'Vendor Access'. Red boxes highlight the 'Project ID *', 'Project Description *', 'Spec Book *', and 'Unit System *' fields.

2. **Save** the Project.

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

Home Previous My Pages

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

Project Summary

Project: 0200910 - BRIDGE AND APPROACHES

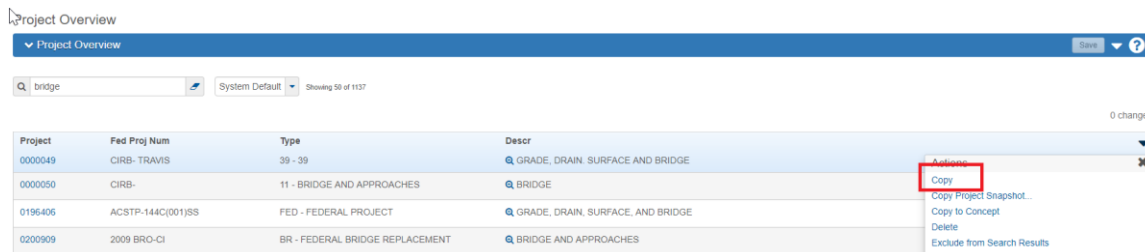
Proposal:

General	Project ID 0200910	Urban/Rural R - RURAL
Counties	Project Description * BRIDGE AND APPROACHES	E & C Percent 6.00
Divisions	Spec Book * 09 - Spec Year 2009	Primary Project County ID C31 - HASKELL
Points	Unit System * English	Primary Project District ID 01200 - SALLISAW
Road Segments	Federal/State Project Number CIRB-131 2009	Estimated Date
Bridge Segments	Controlling Project <input type="checkbox"/>	Revised By Begin typing to search or press Enter
Workflow	Project Type 11 - BRIDGE AND APPROACHES	Designer ZHUB HOLLOWAY, UPDIKE, & BELLEN, INC.
	Project Status 	Vendor Access Begin typing to search or press Enter
	Project Work Type 11 - BRIDGE AND APPROACHES	

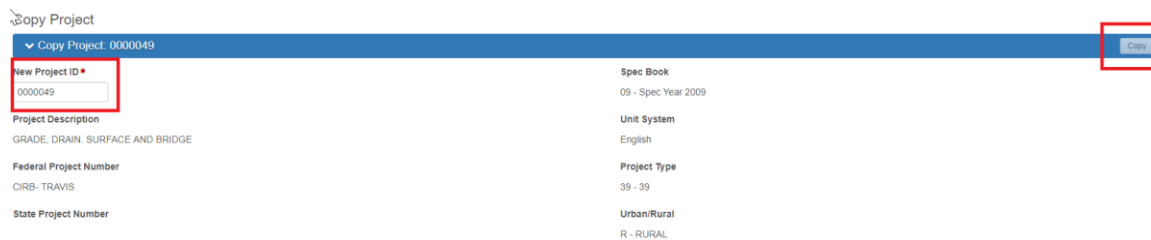
1.3 Copy an Existing Project

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.

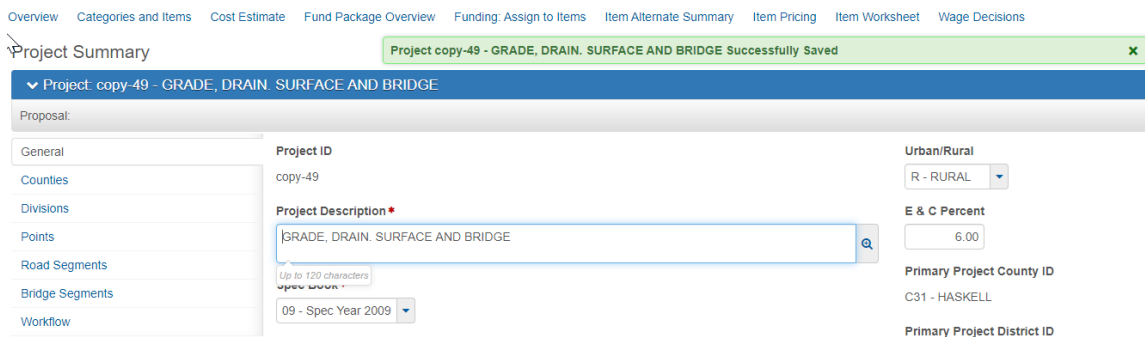
1. From the Project Overview component, search for the project to copy.
2. Click the component **Actions** button for the selected project and select the **Copy** action.



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.

Review

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:

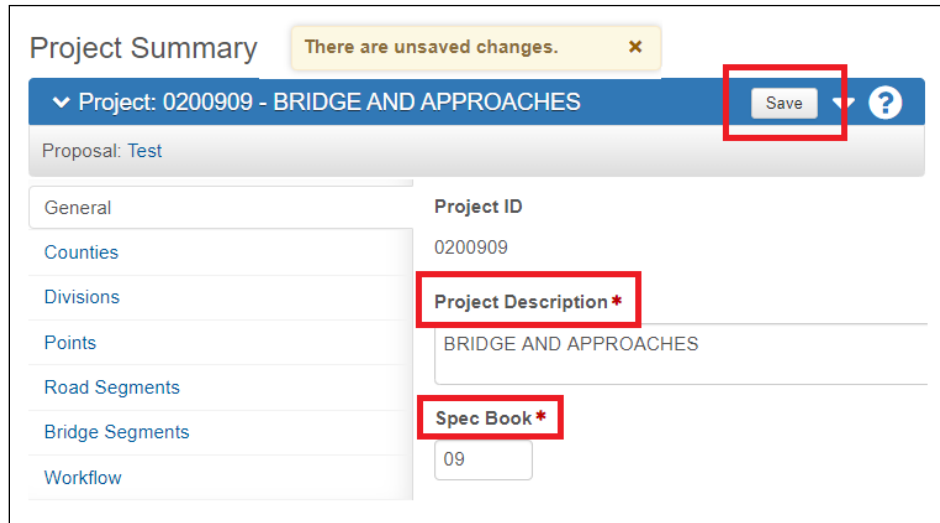
General	Workflow
Counties	ODOT Workflow ▼
Divisions	WorkflowPhase
Points	Consultant Upload, XML upload / Built the Project / Estimation ▼
Road Segments	
Bridge Segments	
Workflow	

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.

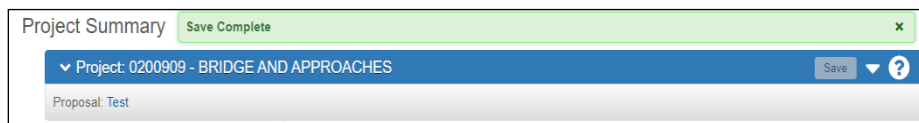
Note: Project ID is Proposal Generator Key & Project Work Type & Fed/State # is the Proposal Generator Key



The screenshot shows the 'Project Summary' interface for project '0200909 - BRIDGE AND APPROACHES'. A yellow notification bar at the top indicates 'There are unsaved changes.' A 'Save' button is highlighted with a red box. The 'General' tab is active, showing the following fields:

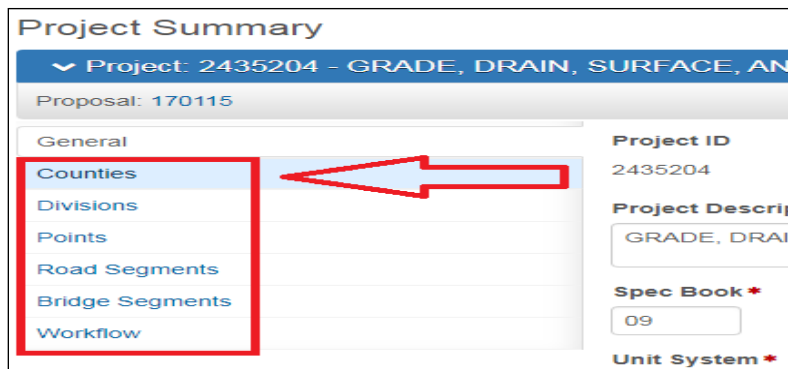
- Project ID:** 0200909
- Project Description *:** BRIDGE AND APPROACHES
- Spec Book *:** 09

The left sidebar contains tabs for General, Counties, Divisions, Points, Road Segments, Bridge Segments, and Workflow.



The screenshot shows the 'Project Summary' interface after saving. A green notification bar at the top indicates 'Save Complete'. The 'Save' button is no longer highlighted.

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.



The screenshot shows the 'Project Summary' interface for project '2435204 - GRADE, DRAIN, SURFACE, AN'. The 'Counties' tab in the left sidebar is highlighted with a red box and a red arrow pointing to it. The 'General' tab is also active, showing the following fields:

- Project ID:** 2435204
- Project Description:** GRADE, DRAIN
- Spec Book *:** 09
- Unit System *:**

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**.

The screenshot shows the 'Project Summary' interface for 'Project: 2414510 - GRADE, DRAIN, SURFACE, AND EROSION'. The 'Counties' tab is active. A 'New' button is highlighted. A search bar contains 'C20' and 'CUSTER'. A dropdown menu shows county options from C12 to C20. The 'Pct' and 'Primary' fields are also highlighted.

County ID	Pct	Primary
C12 CHOCTAW		<input type="checkbox"/>
C13 CIMARRON		<input type="checkbox"/>
C14 CLEVELAND		<input type="checkbox"/>
C15 COAL		<input type="checkbox"/>
C16 COMANCHE		<input type="checkbox"/>
C17 COTTON		<input type="checkbox"/>
C18 CRAIG		<input type="checkbox"/>
C19 CREEK		<input type="checkbox"/>
C20 CUSTER	100.00	<input checked="" type="checkbox"/>

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**.

The screenshot shows the 'Project Summary' interface for 'Project: 2414510 - GRADE, DRAIN, SURFACE, AND EROSION'. The 'Divisions' tab is active. A 'New' button is highlighted in red. A search box contains '05000' and '05000'. Below it, a dropdown menu shows a list of Division IDs from 00001 to 00010. The 'Load next 10' button is also highlighted in red. The 'Primary' checkbox is highlighted in red.

Division ID	Supplemental Description	Primary
00001		<input type="checkbox"/>
00002		<input type="checkbox"/>
00003		<input type="checkbox"/>
00004		<input type="checkbox"/>
00005		<input type="checkbox"/>
00006		<input type="checkbox"/>
00007		<input type="checkbox"/>
00008		<input type="checkbox"/>
00009		<input type="checkbox"/>
00010		<input type="checkbox"/>

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

Q Type search criteria or press Enter Advanced Showing 1 of 1

New

Midpoint - Midpoint SH-54: FROM SH-33, EXTEND SOUTH NEAR THOMAS.

Type *
Midpoint - Midpoint

Latitude (33°37' to 37°) *
35:42:56.00

Longitude (-94°26' to -103°) *
98:43:15.00

Description *
SH-54: FROM SH-33, EXTEND SOUTH NEAR THOMAS.

Category ID
[Empty]

Comment

> Location

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

The screenshot shows a web interface for adding a road segment. At the top left, a 'New' button is highlighted with a red box. Below it, a header bar displays 'SH-54 Primary' on the left and 'SH - STATE HIGHWAY' on the right. The main form area is divided into two columns. The left column contains fields for: Name (SH-54), Number (empty), Description* (Primary), Type (SH - STATE HIGHWAY), Route (SH-54), Lane Mile (empty), Length in Miles (empty), Width (empty), and Depth (empty). The right column contains fields for: Start Latitude, Start Longitude, End Latitude, End Longitude, Begin Termini, End Termini, Begin Station, End Station, and Category ID. A 'Comment' field is located at the bottom left, and a 'Location' link is at the bottom center.

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

The screenshot shows a web application interface for adding a new bridge segment. On the left, there is a sidebar with navigation links: Counties, Divisions, Points, Road Segments, Bridge Segments, and Workflow. The main content area has a search bar at the top with the text 'Type search criteria or press Enter' and an 'Advanced' link. Below the search bar is a 'New' button, which is highlighted with a red box. Underneath the 'New' button is a section titled 'New Bridge Segment'. This section contains several input fields and dropdown menus, all of which are highlighted with a red box: 'Bridge ID *' (a dropdown menu), 'Description *' (a text input field with a search icon), 'Bridge Type' (a dropdown menu), 'Length in Feet *' (a text input field), 'Width' (a text input field), and 'Number of Spans' (a dropdown menu). To the right of these fields are four more dropdown menus: 'Start Latitude', 'Start Longitude', 'End Latitude', and 'End Longitude'. Below these fields is a 'Comment' dropdown menu and a 'Location' section with a right-pointing arrow.

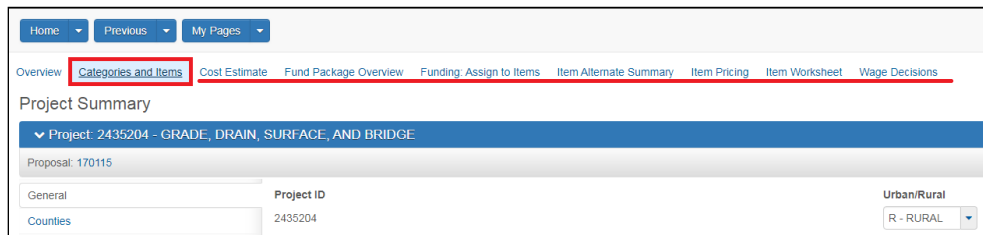
2.0 Adding Project data, - categories and items

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.



The screenshot shows a web application interface for project management. At the top, there are navigation buttons: 'Home', 'Previous', and 'My Pages'. Below this is a horizontal menu with several tabs: 'Overview', 'Categories and Items' (highlighted with a red box), 'Cost Estimate', 'Fund Package Overview', 'Funding', 'Assign to Items', 'Item Alternate Summary', 'Item Pricing', 'Item Worksheet', and 'Wage Decisions'. The main content area is titled 'Project Summary' and displays a dropdown menu for 'Project: 2435204 - GRADE, DRAIN, SURFACE, AND BRIDGE'. Below this, there is a 'Proposal: 170115' section. A table-like structure shows 'General' and 'Project ID' (2435204) on the left, and 'Urban/Rural' (R - RURAL) on the right.

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


▼ Project: 2435204 - GRADE, DRAIN, SURFACE, AND BRIDGE

General

Categories

Category Alternate Sets

Items

Q Type search criteria or press Enter  Advanced Showing 7 of 7

New

▼ 0100 - ROADWAY

Category ID * ▼

0100

Up to 4 characters

Section Group ▼

0001

E & C Percent ▼

6.00

Low Cost Flag

Yes

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**.

The screenshot shows the 'Project Category and Item Summary' interface. The main title is 'Project 2414510 - GRADE, DRAIN, SURFACE, AND EROSION'. The left sidebar has tabs for 'General', 'Categories', 'Category Alternate Sets', and 'Items'. The 'Category Alternate Sets' tab is active. A search bar is present with the text 'Type search criteria or press Enter' and an 'Advanced' link. Below the search bar, there is a 'New' button. A table is displayed with columns for 'Cat Alt Set ID', 'Description', 'Life Cycle Cost Indicator', and 'Categories'. The 'Cat Alt Set ID' and 'Description' columns are highlighted with a red box. The 'Life Cycle Cost Indicator' column has a dropdown menu. The 'Categories' column shows a count of '0'.

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.

Project Category and Item Summary

Project: 2414510 - GRADE, DRAIN, SURFACE, AND EROSION

General

Categories

Category Alternate Sets

Items

Category ID: No Filter

Advanced Showing 50 of 83

1 added | 0 marked for deletion | 0 changed

Item ID	Description	Quantity	Unit
0001	201(A) 0102 - CLEARING AND GRUBBING	1,000	LSUM
0002	202(A) 0183 - UNCLASSIFIED EXCAVATION	53,233.000	CY

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**

Project Category and Item Summary

Project: 2414510 - GRADE, DRAIN, SURFACE, AND EROSION

General

Categories

Category Alternate Sets

Items

Category ID: No Filter

Advanced Showing 80 of 83

1 added | 0 marked for deletion | 0 changed

New

Item ID	Description	Quantity	Unit
0001	201(A) 0102 - CLEARING AND GRUBBING	1,000	LSUM

Item ID: 201(A) 0102 - CLEARING AND GRUBBING

Category ID: 0100 - ROADWAY

Project Item Supp Description

Unit of Measure: LSUM

Project Item Previous Price

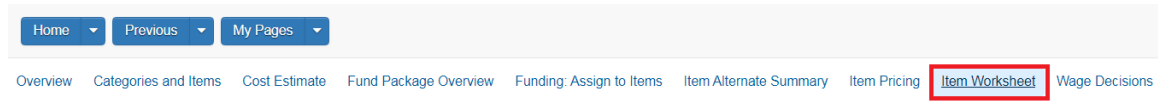
Non-Bid

Combine With Like Items

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.

Project Item Worksheet

Project: 3288704 - PAVEMENT REHABILITATION Save

Project Item Total
2,353,784.75

Q [Type search criteria or press Enter] Advanced Showing 15 of 15 0 added 0 marked for deletion

Cat ID	Proj Line Num	Item	Descr	Units	Quantity	Price	Ext Amt	Suppl Descr
0100	0001	202(A) 0183	UNCLASSIFIED EXCAVATION	CY	4,120.000	7.50000	30,900.00	
0100	0002	303(A) 2100	AGGREGATE BASE TYPE A	CY	4,120.000	54.50000	224,540.00	
0100	0003	326(B) 0100	GEOGRID REINFORCEMENT	SY	16,940.000	2.75000	46,585.00	
0100	0004	402(B) 0225	TRAFFIC BOUND SURFACE	TON	3,670.000	29.50000	108,265.00	
0100	0005	407(D) 0401	(SP) HOT TACK MATERIAL	GAL	8,167.000	2.00000	16,334.00	
0100	0006	411(B) 5945	SUPERPAVE, TYPE S3/PG 6...	TON	8,790.000	90.00000	791,100.00	
0100	0007	411(D) 5975	SUPERPAVE, TYPE S5/PG 6...	TON	6,217.000	74.75000	464,720.75	
0100	0008	411(H) 6210	SUPERPAVE, TYPE S3/PAT...	TON	1,200.000	184.50000	221,400.00	
0100	0009	412 5267	COLD MILLING PAVEMENT	SY	670.000	3.00000	2,010.00	
0100	0010	619(B) 4728	REMOVAL OF ASPHALT PAV...	SY	15,523.000	4.00000	62,092.00	
0300	0011	823 8478	(SP) PORTABLE TRAFFIC SI...	SD	240.000	130.00000	31,200.00	
0300	0012	856(A) 6530	TRAFFIC STRIPE(MULTI-P...	LF	91,872.000	2.00000	183,744.00	
0300	0013	880(A) 8995	CONSTRUCTION TRAFFIC ...	LSUM	1.000	15,000.00000	15,000.00	
0600	0014	642(B) 0096	CONSTRUCTION STAKING ...	LSUM	1.000	20,000.00000	20,000.00	
0640	0015	641 1552	MOBILIZATION	LSUM	1.000	135,894.00000	135,894.00	

New Select Items...

Editable 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.**

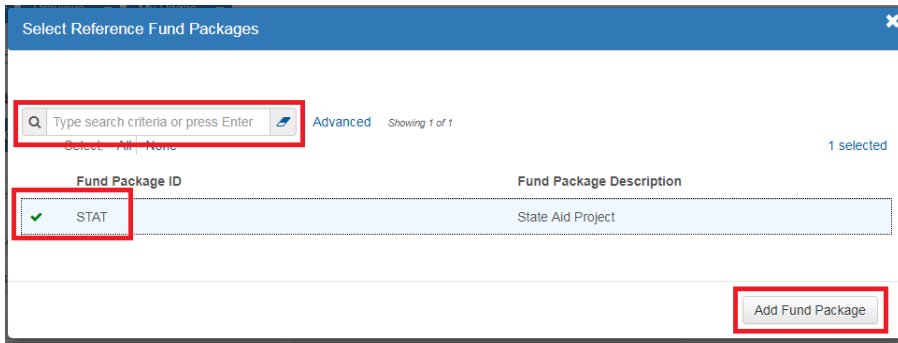
Fund packages will be pre-defined as reference data. When you create a new recorded by selecting a reference fund package, all of the funds listed in the reference fund package are copied to the new fund package for the project.

Use the Default Funding Package for the whole Project.

Note: Funding is Proposal Generator Key

Fund Package *	Description *	Project Level	Funds
DFFD	Default Funding for Design	<input type="checkbox"/>	1
FED	Federal Aid Project	<input type="checkbox"/>	1

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.

Select Fund Packages...

Project ID	Funds	Fund Package	Description	Project Level
8	1	100	0100 ROADWAY	No

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

▼ Project: 0000-copy - Test Save ?

Fund Packages Default - Default funding for design. 2 of 2 ← →

Fund Package ID*

Fund Package Description* 🔍

Project Level Funding Source

▼ Funds in Package

Select Funds... 0 marked for deletion | 0 changed

Fund	Descr	Prior*	Type*	Percentage	Limit	Account Fund	Fund Grp
0000	🔍 Default Funding for Design	1	Non Federal	100.0000	<input type="text"/>	<input type="text"/>	<input type="text"/>

dropdown menu:
Federal
Non Federal
Other
State

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.

Home Previous My Pages

Overview Categories and Items **Funding: Assign to Items** Item Alternate Summary Item Pricing Project Item Worksheet

Fund Package Overview

Project: 2414510 - GRADE, DRAIN, SURFACE, AND EROSION Save ?

Type search criteria or press Enter Advanced Showing 2 of 2

New Select Fund Packages... 0 added | 0 marked for deletion | 0 changed

Fund Package *	Description *	Project Level	Funds
DFFD	Default Funding for Design	<input type="checkbox"/>	1
FED	Federal Aid Project	<input type="checkbox"/>	1

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.

Project Funding Assignment

Project: 2414510 - GRADE, DRAIN, SURFACE, AND EROSION Save ?

0 changed Expand All

Fund Package	Description	Funds
(A) DFFD	Default Funding for Design	1
(B) FED	Federal Aid Project	1

All Project Items Mixed None A B
> 0100 - ROADWAY Mixed None A B
> 0300 - TRAFFIC Mixed None A B
> 0600 - STAKING Mixed None A B
> 0640 - CONSTRUCTION Mixed None A B

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

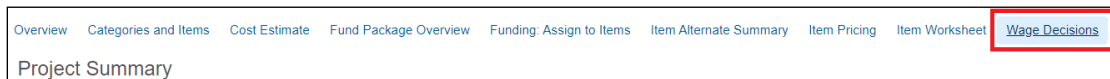
Overview Categories and Items Fund Package Overview Item Alternate Summary Item Pricing **Project** Item Worksheet

Project Funding Assignment

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.



Project Wage Decision Overview

▼ Project: 0009504 - GRADE, DRAIN, BRIDGE(RCB) Save ?

Project Work Type Local Funded
07 - GRADE, DRAIN, SURFACE AND BRIDGE False

Federal Funded
True

▼	Name	Description	Percent	Primary
	C55	OKLAHOMA	100.00	Yes

Select Wage Decisions... 0 marked for deletion | 0 changed

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

Select Wage Decisions

Q Type search criteria or press Enter Advanced Showing 9 of 9

Select: All None 2 selected

Decision Num	Mod Num	Mod Descr	Publication Dt	Constr Type	Issuing Auth	Description
OK190014	0 0		01/04/2019	300 - Highway	Federal	County: Comanche Cour
OK190015	0 0		01/04/2019	300 - Highway	Federal	County: Oklahoma Coun
✓ OK190016	0 0		01/04/2019	300 - Highway	Federal	Counties: Le Flore and S
✓ OK190017	0 0		01/04/2019	300 - Highway	Federal	Construction Type: High

Add to Project

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.

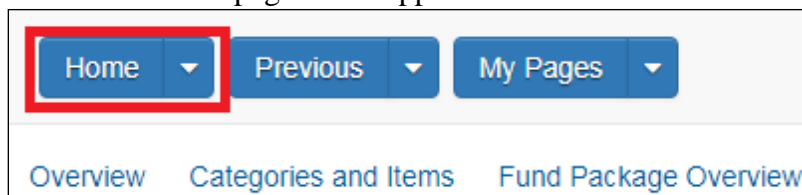
3. If it passes, you will get a Project is valid message. If it fails, the reasons will be outlined on the page. Fix the issue and rerun the process until Project is valid.

Project Validation Results

Project '0200910' 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. **While you are entering item information for a Project, you may want to lock the Project for other users.**
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. **Make sure to unlock the project when you have finished making changes, select Unlock from the Actions menu.**

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 / Submitted to OE, change the workflow phase to **OE Review**.

Project Summary

Project: 2423920 - DIVISION 4 BRIDGE PAINTING

Proposal:

General

Counties

Divisions

Points

Road Segments

Bridge Segments

Workflow

Workflow

ODOT Workflow

WorkflowPhase

OE Review / Prep / Build Proposal

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