Trns•port Preconstruction® 2.02

USER Manual

Virginia Department of Transportation

SUPPORT / HELP

Purpose	Name	Email	Phone Number
All Trnsport Questions/Support	**Trnsport Support**	**TRNSPORTSupport@vdot.virginia.gov**	
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	Frank Gbinije (Schedule Category)	frank.gbinije@vdot.virginia.gov	804-786-2980

Web Trnsport Dedicated User Website

VDOT has a dedicated website for Web Trnsport User & Training Manuals; a User discussion group and Announcements. The site is called OutsideVDOT

https://outsidevdot.cov.virginia.gov

Note to Consultants/External Users: This site runs on the Virginiadot domain and requires a different login and password.
Please contact Diane Smith (804) 786-1169 or Jonna Brooks-Hughes (804) 786-8686 or Central.Security@vdot.virginia.gov

Consultant/External Users enter Virginiadot Domain login/password here

VDOT employees, Click Here

VDOT Trnsport Preconstruction USER'S Manual

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1. GETTING STARTED

Web Trnsport Preconstruction software is a Web application designed to run on the Internet Explorer browser. If you encounter problems running the software, check to make sure that your Web browser settings are correct.

- The Trns•port software is designed to run on the Internet Explorer browser, Version 8, 9.
- If you use Internet Explorer version 10 or 11, skip step 1 in section 1.1

1.1 Internet Browser Settings

The browser mode should be set to its native mode at all times, not to a previous version view or a compatibility view. There are three settings that should be set before starting Web Trns•port.

1. Browser Tools Menu
    a. Select **Tools**
    b. Select **Compatibility View Settings**.
    c. Ensure **Display internet sites in Compatibility View** is **<u>Unchecked</u>.**

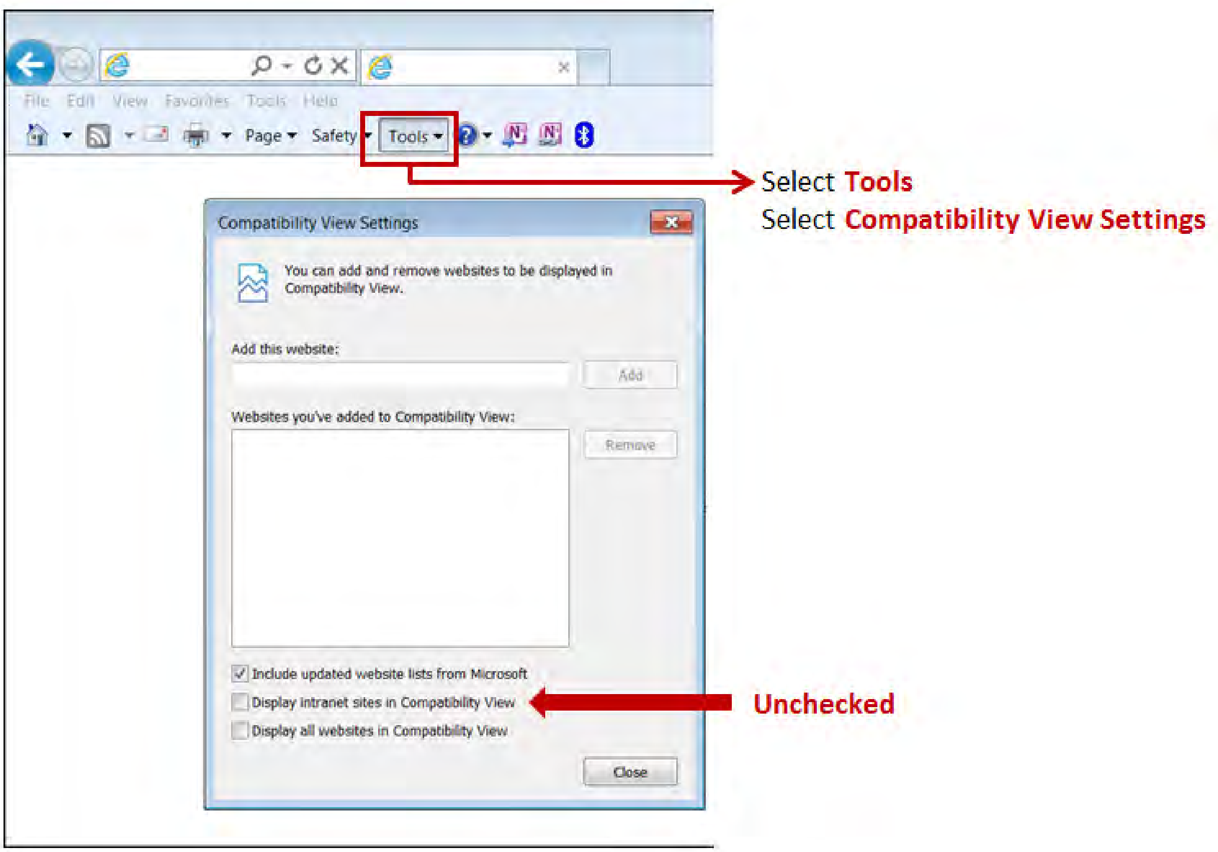


Figure 1 – Browser Setting #1

2. Browser Tools Menu
   a. Select the **Tools** menu, select **Internet Options**
   b. Under **Browsing History,** select **Browsing History**
   c. For the **Check for newer versions of stored pages** setting, click the **Every time I visit the webpage** option.
   d. Click **Ok** (Do not close the Internet Options box)

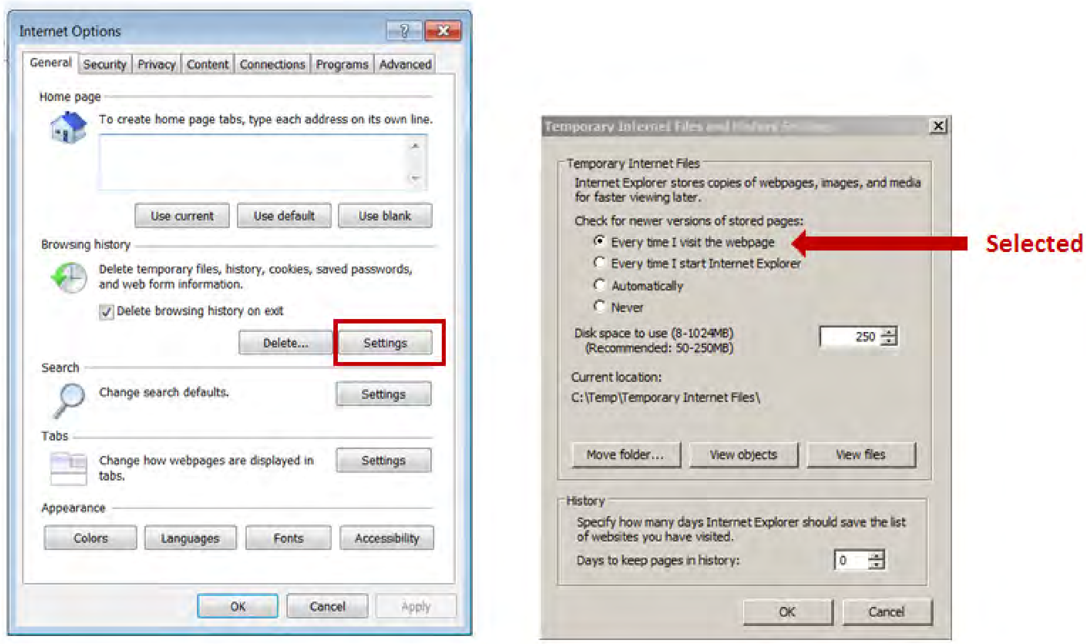
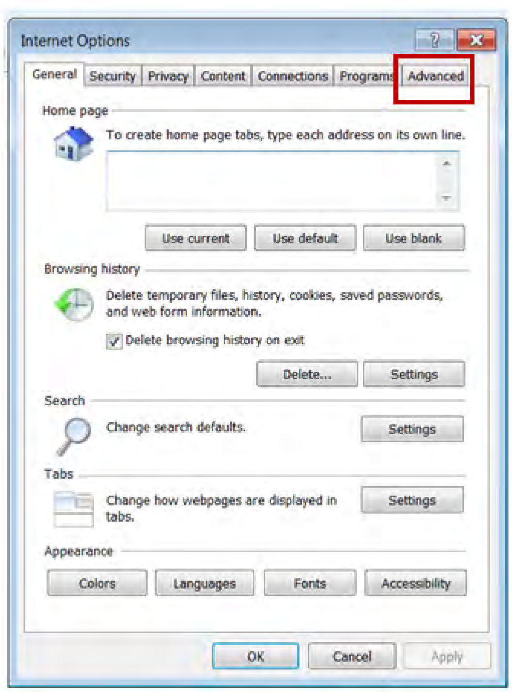


Figure 2 – Browser Setting #2

3. In the Internet Options dialog box, click the **Advanced tab**
   a. In the **Settings** box, scroll down to the **Security** section, and ensure the **Enable DOM Storage** option is selected.
   b. Click **Ok**



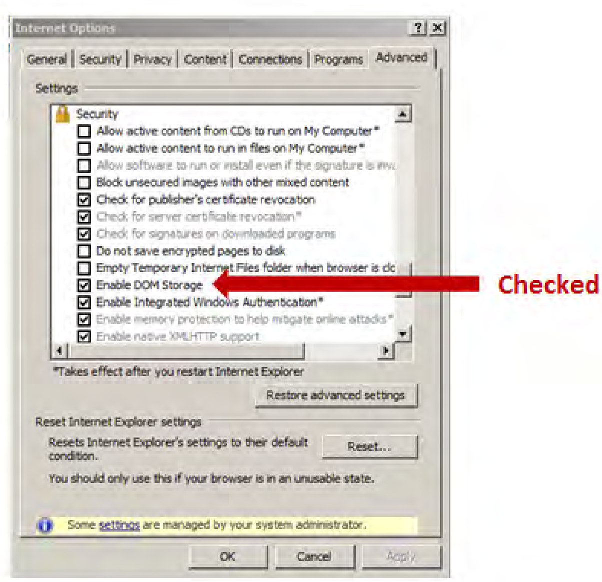


Figure 3 – Browser Setting #3

1.2 Logging On

To Log on to Web Trns·port, follow these steps:

1. Open Internet Explorer and navigate to:

   https://aashtoproject.cov.virginia.gov

2. Enter your COV **Username** (format: First.LastName)
3. Enter your **Password**.
4. Select **Agency Users** for the Domain.
5. Click the **Logon button**.

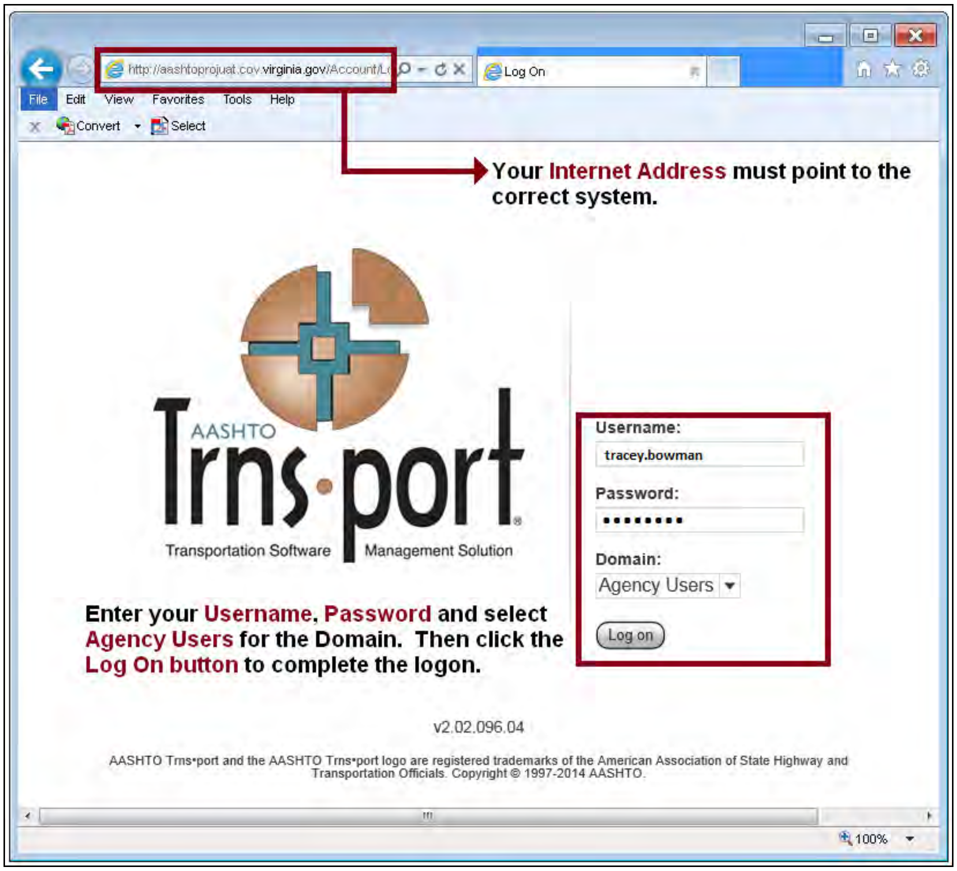


Figure 4 - The Web Trns*port Logon Screen

If you get an error before reaching this screen, you have an issue with your COV login/password please contact:

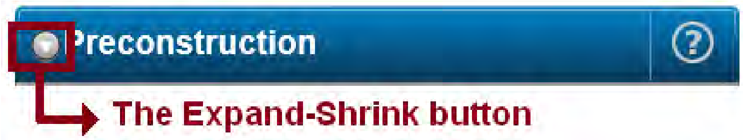
VITA helpdesk at VCCC@vita.virginia.gov or (866) 637-8482.

For all other Web Trnsport questions, please contact TRNSPORTSupport@vdot.virginia.gov

1.2.1 Logging on Web Trns*port Preconstruction

When you logon to Web Trns*port, you will be taken to the Web Trns•port Dashboard.

- The Dashboard is the gateway to all of the Web Trns•port components.
- To expand or contract a component, click the Expand-Shrink button located in front of the Component name.



- Your Role and access rights will determine which Web Trns•port components that you will have access to.

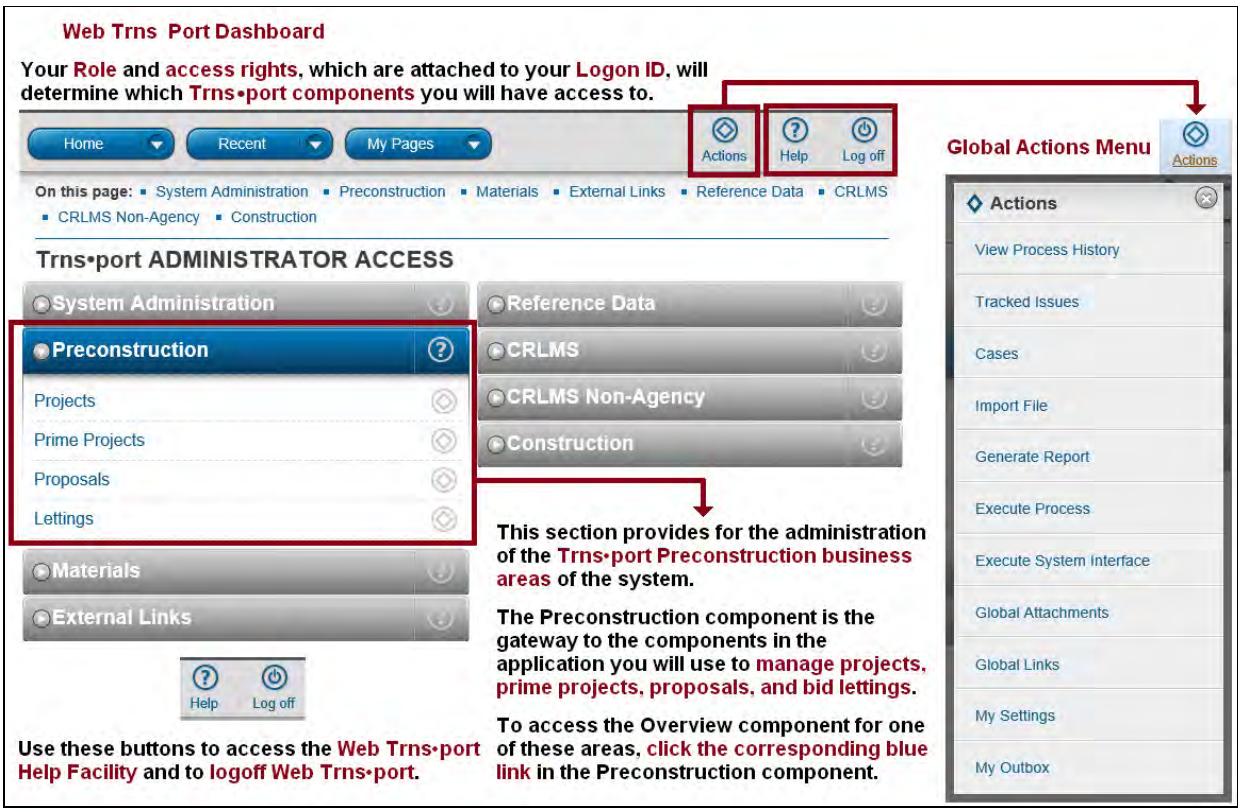


Figure 5 – Access Rights and the Web Trns•port Dashboard

1.2.2 Logging Off

To Log off the system properly click the **Log off** 

button on the Menu Bar on any page in the application.

- When you log off, the software **ends your session** and takes you to the Web Trns•port logon page.

1.3 Screens in Trns·port Preconstruction

Note: Trns•port navigation features will **only provide access to those components for which your active role has been assigned access rights.**

The Trns•port Dashboard

When you log on to the Trns•port system, the application opens on the **Trns•port Dashboard** (see Figure 6).

You can go to the dashboard at any time by clicking the **Home button on the Menu Bar**.

The **dashboard contains one or more components.**

- Each component is **identified** by a **title set within a blue header bar.**
- Each Trns•port component provides **access to the information and processes required for a specific area of your agency's work.**
- The **components you see on your dashboard** are those that match the **specific areas of responsibility assigned to your active role.**

The following example from the Web Trns•port Help facility shows the dashboard as it might appear for a system administrator.

- Be aware that **some of the components shown in the example might not be available for you** depending on your active role and which business areas are included on your system.

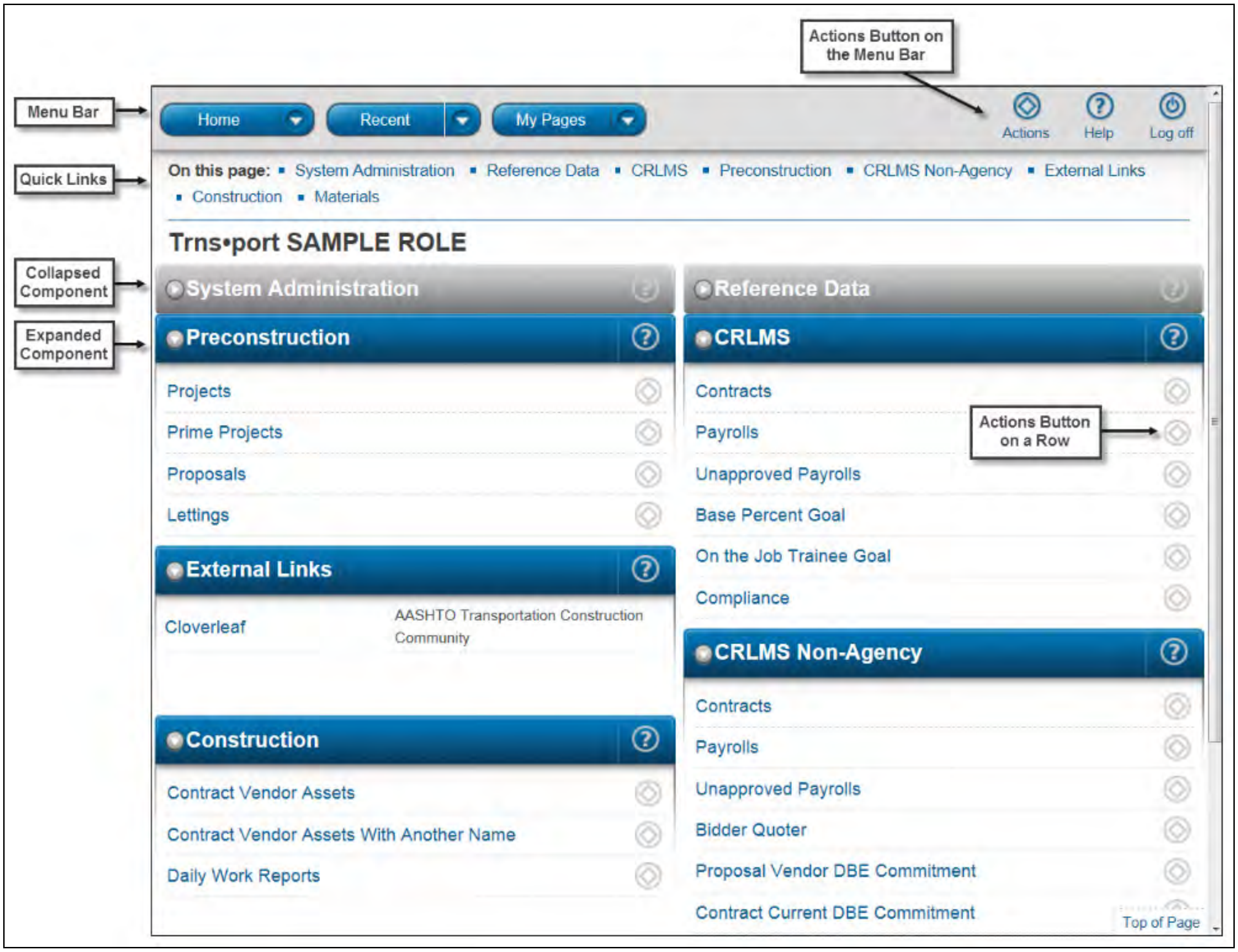


Figure 6 - The Web Trns•port Dashboard

1.3.1 Menu Bar

The system displays the **Menu Bar at the top of every webpage** in the system.

- The buttons and menus on this bar help you to **move quickly through the system** to visit the pages and components you use most often.

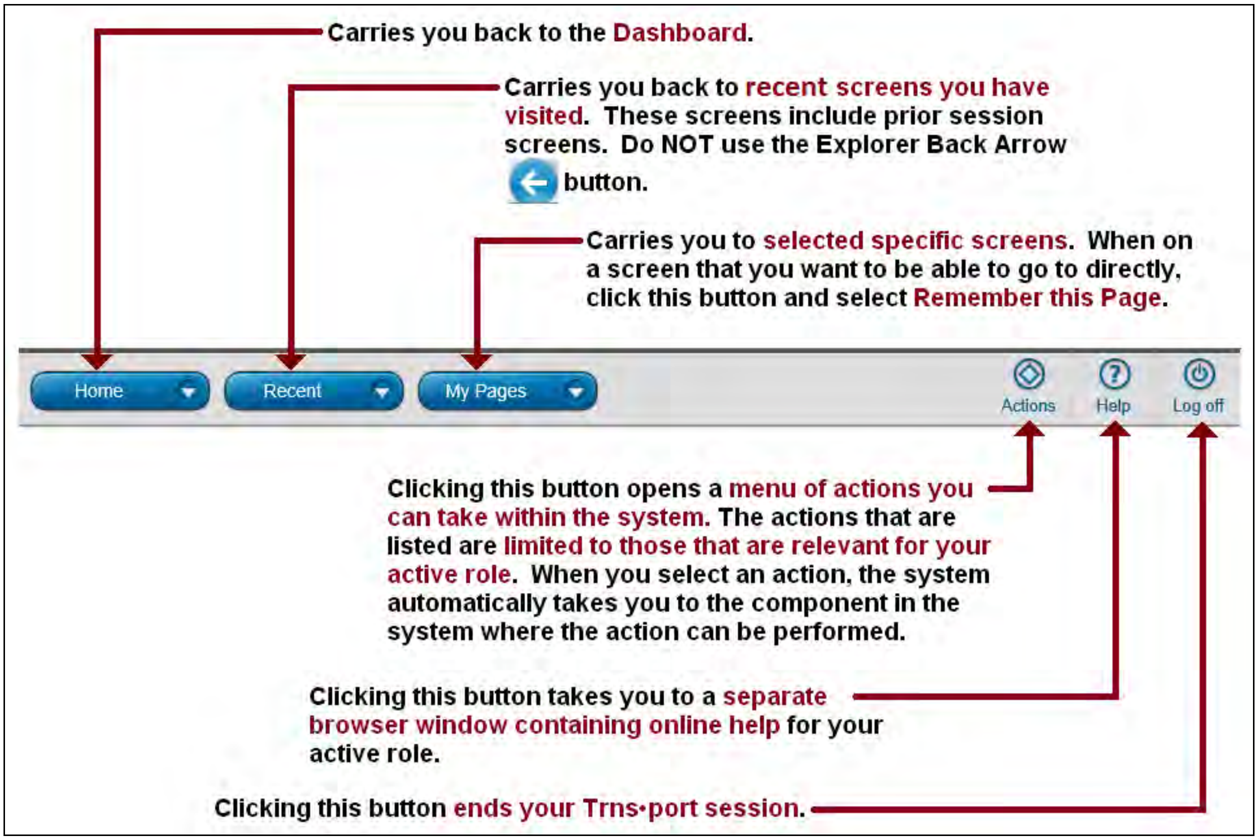


Figure 7 - The Web Trns•port Menu Bar

1.3.2 Quick Links

Quick links are **located below the Menu Bar and above the webpage title** and are displayed in **blue text**.

- These links allow you to **quickly jump to application pages related to the current page.**
- When you click one of these quick links, the system **automatically scrolls the page to the location of the component.**

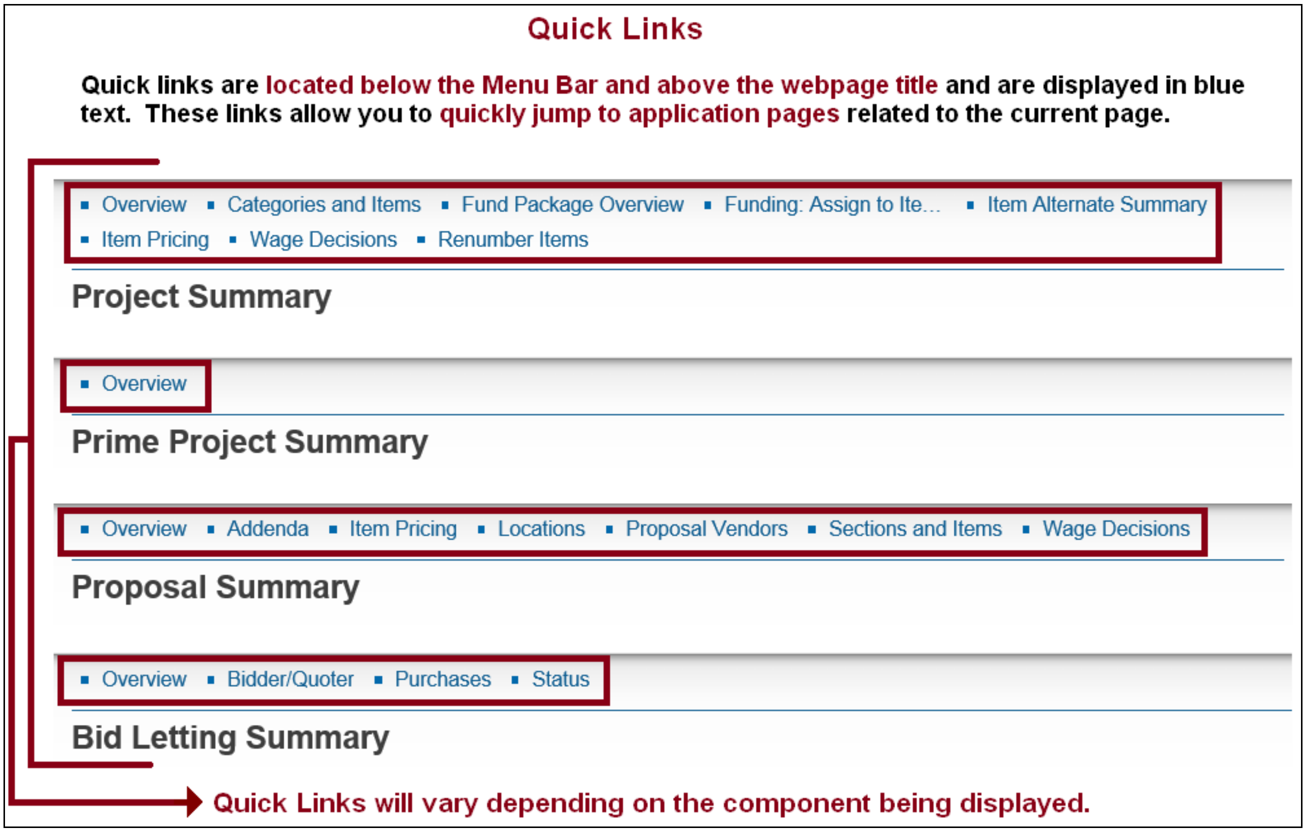


Figure 8 - The Web Trns•port Quick Links

1.3.3 Icons

Icons are small images throughout the system that either **convey information** or can be clicked to **perform an action.**

- For example, a red asterisk icon indicates a required field. A broom icon in a Quick Find search box can be clicked to reset search criteria.
- As you rest your mouse pointer over an icon, a **short description of the icon's function** will be displayed.

The following table, taken from the help facility, shows some of the **common icons** used in the system:

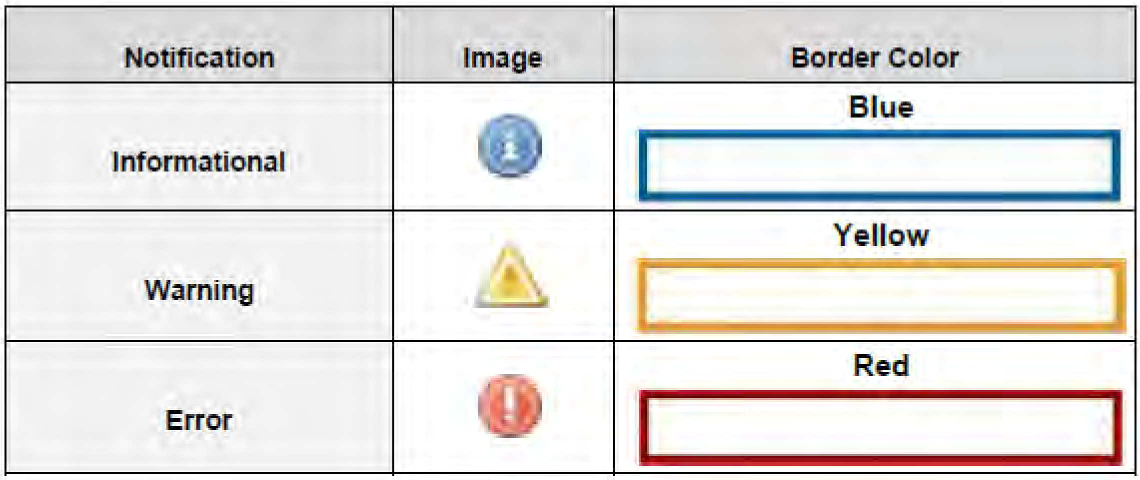
Icon	Usage
	The broom icon appears in Quick Find search boxes after criteria is entered. You can click the icon to reset the search criteria
	This magnifying glass icon at the left side of a field indicates an auto-complete field. Auto-complete fields display a filtered list of field values based on the first few characters you type. You can press Enter to show all values.
	This magnifying glass is sometimes displayed on the right side of a text box. Clicking this button opens a text dialog panel that allows you to view and edit the text in a larger area.
	A red asterisk indicates a field where data entry is required.
	The actions icon appears on **Actions** buttons that you can click to display an **Actions** menu. Actions menus provide access to commands and functions you can perform on data.
	The undo icon appears on **Undo** buttons that you can click to reverse a delete action.
	The help icon appears on **Help** buttons that you can click to display the help system.
	The calendar icon is displayed on the right side of a date field. You can click the calendar icon to display a calendar where you can pick a date as the field value.

Figure 9 - The Web Trns•port System Icons

1.3.4 Notifications

A standard system feature is Trns•port Notifications. Notifications display real time status messages for processes you have run and other system information related to your work.

All levels of messaging have the following standard traits:



Notification	Image	Border Color
Informational		Blue
Warning		Yellow
Error		Red

Figure 10 – Notification Indicators

Figure 11 – Notification Examples

1.4 Overview, Summary, Tabs and Quick Links

All the major components in Preconstruction are accessed the same way, with the same navigation method used for all of the major Preconstruction Components: Projects, Prime Projects, Proposals and Lettings.

1. You **start at the Dashboard** and **select the major component: Projects, Prime Projects, Proposals and Lettings.**
2. **Clicking on the component** will take you to that **component's Overview screen**. At this point, you can **search** for and **select** the specific Project, Prime Project, Proposal or Letting.
   - At the component's Overview screen you can also add a new Project, Prime Project, Proposal or Letting.
3. Once you have **found** your specific Project, Prime Project, Proposal or Letting, you can **click on its link** which opens in the **Summary screen** where information can be edited.
4. The Summary screen, as are most other screens, is arranged by Tabs, with each tab containing information related to the name of the tab.

For example, the **Project Summary component contains all the General Project Header information** currently recorded about the project, as well as its counties, districts, and other information related to the location and type of work for the Project.

- Information is grouped in **seven tabs,** located on the left side of the component.
- To access the Project Summary, click the **Projects link from the Preconstruction component**, and then select **View** from the Actions Menu on the appropriate project row or click on the Project Number link in blue.
- The Project Summary component opens on the General tab and will allow you to view or change information in these fields:
  - Click in a field and add, change, or delete information as required.
  - If the information is in a table, then a dropdown will allow you to select from the displayed list.
  - If the field is display only, then you will be unable to click in the data.

When you are finished making changes, click the **Save button to apply your changes**. The system displays a message to confirm that your changes were saved in the database.

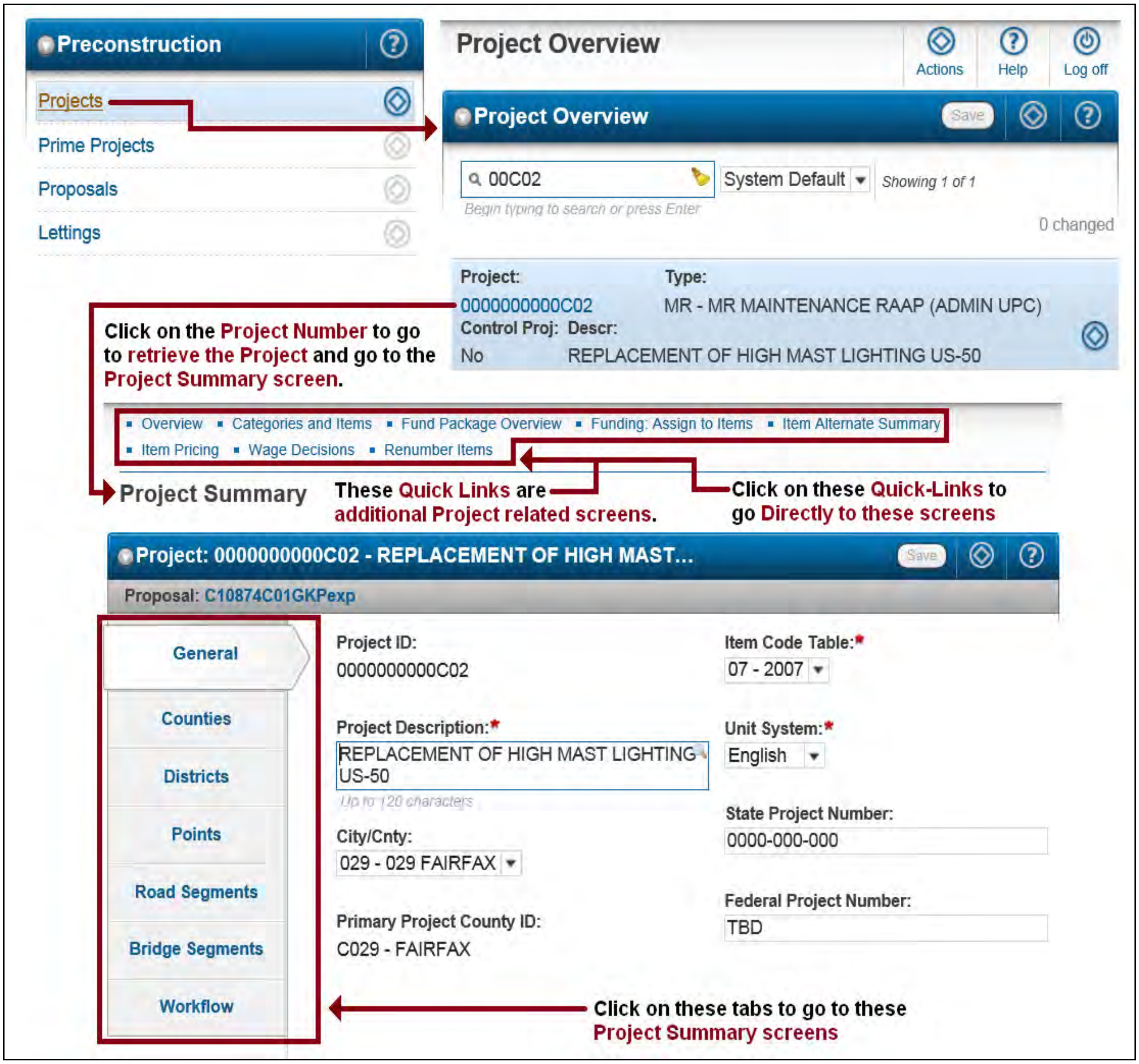


Figure 12 - Opening a Project in Web Trns•port Preconstruction

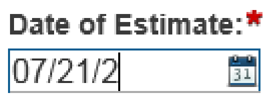
1.5 Entering Dates

Dates are shown and are entered into Web Trns·port in **MM/DD/YYYY format.** Fields to be filled-in with a date are shown with a default value of spaces.

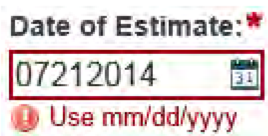
Dates may be entered in two ways:

1. **Directly key in the date.**

   Simply **click in the date box** and directly **enter the date.** For example, if you were to enter the date July 21, 2014, you would type 07/21/2014.



   You **MUST enter the slashes** into the date or you will get an error.



2. **Use the Calendar feature.**

   The date field will display a **Calendar**  **icon** to the right of the date. Click on the icon to open the calendar. **Select the desired date** and it will be **automatically entered into the date box**.

Figure 13 - Using the Calendar Feature to enter a Date

1.6 Working with Searches, Filters and Sorts

1.6.1 Using the Quick Find Search Box

A Quick Find search box is a part of each component that contains a list.

- It **searches all rows** in the list for a string of text and then d**isplays only rows with fields containing that string**. The search begins automatically once the **third character** is entered and the text entered will remain there until you click the button.

Follow these steps to use the **Quick Find search box:**

1. **Click in the Quick Find search box** for a list that you want to filter.
   - For example, in the Project Overview screen, the list being searched is the list of projects.
2. Type the **string of characters** you want to **match** or use as a delimiter. The Quick Find filter is **not case-sensitive.**
   - After you type at least three characters and wait a moment, the system refreshes the list and displays the rows that contain the string of characters you entered.
   - The search criterion creates a temporary filter.
3. If you want to **remove a row from the list of search results**, select **Exclude from Search Results** on the Actions Menu for that row.
   - **The row is removed from the list of search results.**
   - You can exclude additional rows as needed.

Every system component that contains a Quick Find search box provides an **Advanced filter link** that allows you to create and save custom sorts and filters that **search on multiple criteria.**

- You can save sorts and filters permanently for reuse any time you visit the component.
- Sorts and filters are associated only with the component on which they are built.

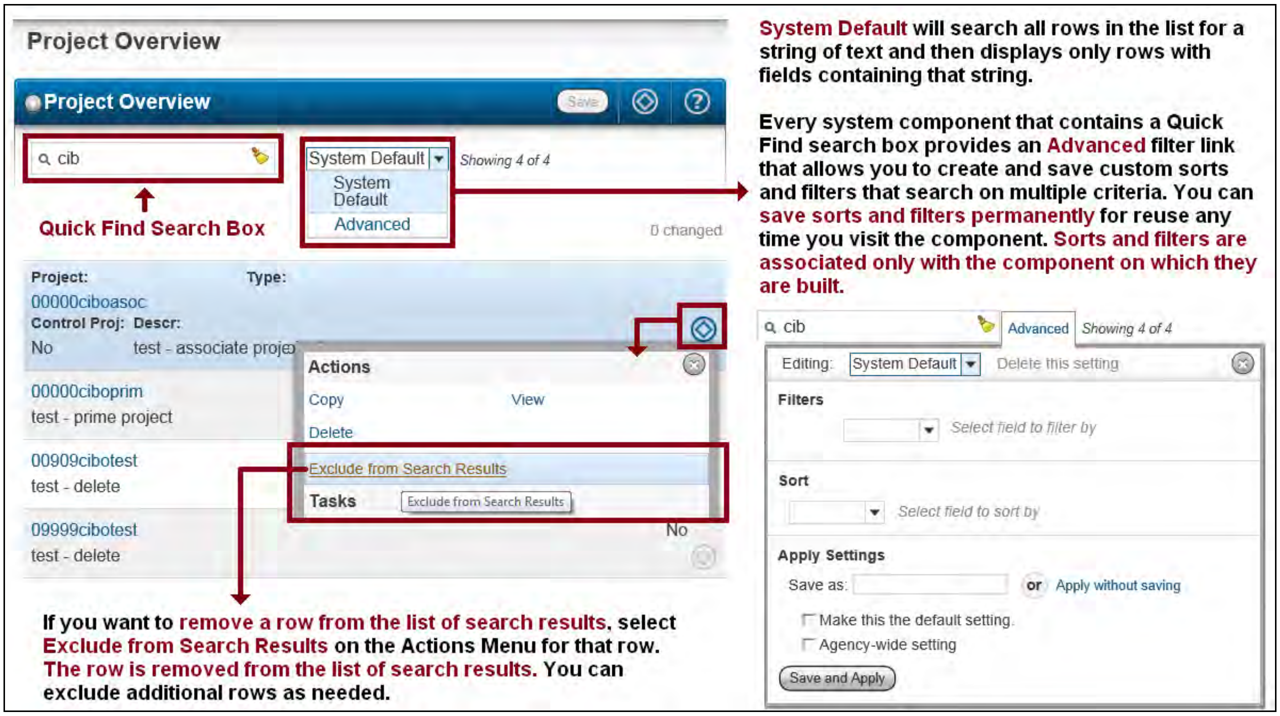


Figure 14 - Using the Quick Find Search Box

1.7 Working with the Advanced Filter

Every system component that contains a Quick Find search box provides an Advanced filter link that allows you to create and save custom sorts and filters that search on multiple criteria.

- The Advanced Filter lets you search for data using a **more complex chain of criteria**.
    - In this window, you can give numerous combinations of conditions to filter, with operators, values and logical operators. We will discuss the more advanced features in the next section.
- You can **save sorts and filters** permanently for reuse any time you visit the component.
- **Sorts and filters are associated only with the component on which they are built.**

From the **Quick Find selection dropdown**, click on **Advanced**. The **Advanced Filter** window opens.

- When you click the **Advanced link**, the system displays the **Advanced Filter overlay** with three sections titled **Filters, Sort,** and **Apply Settings**. It also contains a **Close button** in the top right corner.

Both Filters and Sort fields are the fields associated with the Project.

- **Visible Columns** are the ones being displayed on the Project rows in the Project Overview screen
- **Hidden Columns** are all other fields associated with the Project, as found in all tabs in the Project Summary screen.

1.7.1 Using Advanced Sorting and Filters

Creating and Using Advanced Filters

Every system component that contains a Quick Find search box provides an **Advanced filter link** that allows you to **create and save custom sorts and filters that search or sort on multiple criteria.**

- When you click the **Advanced link**, the system displays the Advanced Filter overlay with **three sections** titled **Filters, Sort,** and Apply **Settings.** It also contains a **Close button** in the top right corner.

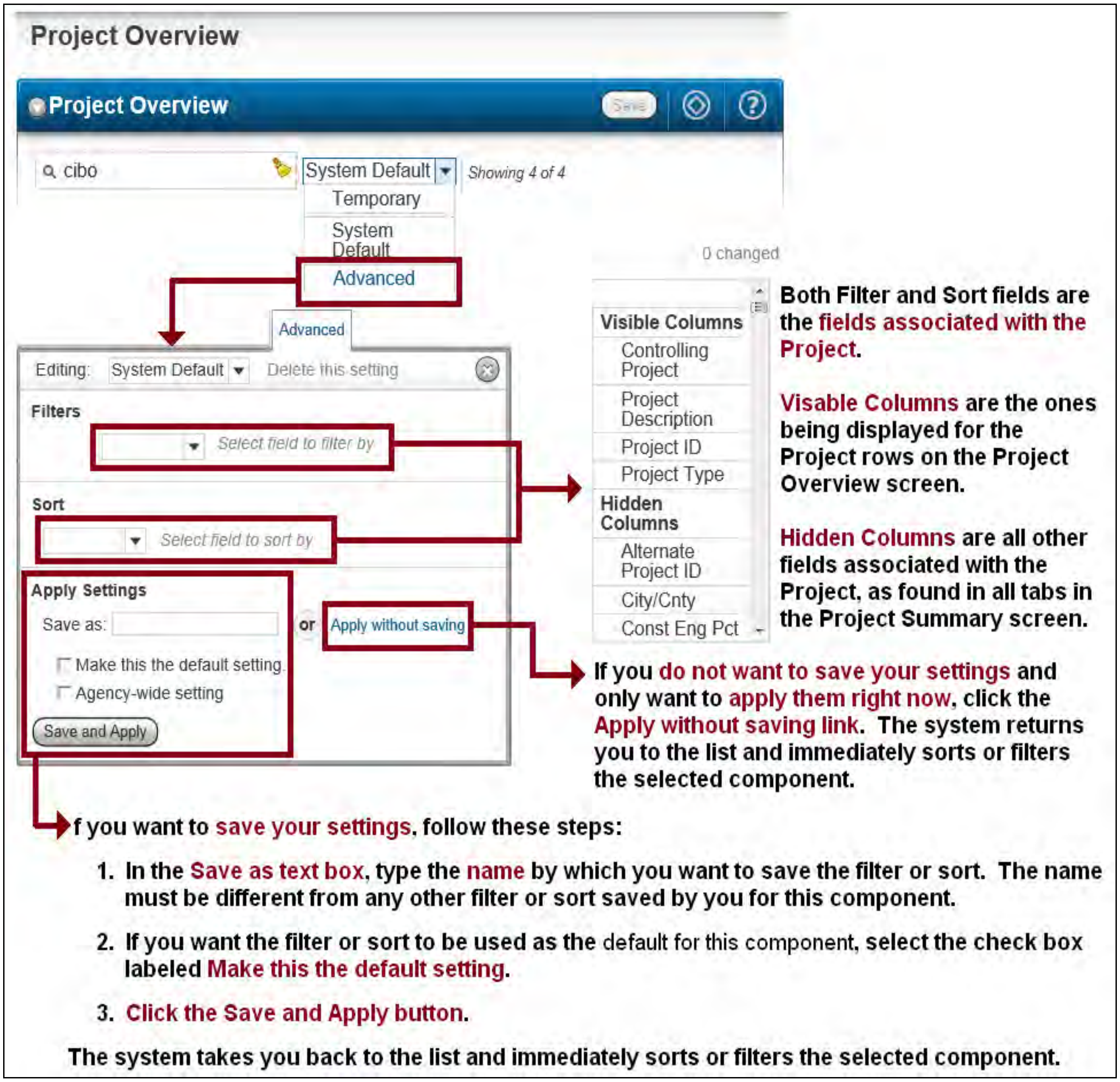


Figure 15 - The Advanced Filter

1.7.2 Creating a Filter

Follow these steps to **create a filter:**

1. **Click the down arrow in the field below the Filters header to display** a list of all the columns in the component (including hidden columns). **Select the column** you wish to filter.
   - The system displays a **list of operators appropriate for the chosen column and a field for entering the value you want to match** (depending on the column you are filtering, this may be a text box, a check box, or a tool for selecting a date).
2. Click the down arrow and **select the operator you want to use to narrow your filter.**
   - Depending on the column, operators can include: Contains, Does Not Contain, Begins with, Is Equal To (=), Is Not Equal To, Greater Than (>), Less Than (<), Greater Than or Equal To (>=), Less Than or Equal To (<=), Is Blank, Is Not Blank, Is On, Is Not On, Is Earlier Than, Is Earlier Than or On, Is Later Than, Is Later Than or On, Is Later Than, Within Past ___ Days.
3. **Enter the value you are trying to match or want to use as a delimiter** (if it is a text box, the filter is not case-sensitive).
4. **You can create multiple clauses in your filter.** To add a second clause, select **And** or **Or** to join the first clause with the second. Then enter column, operator, and value as in steps 1-3.
   - When multiple filter clauses are joined using the And or Or operators, the system follows the **standard order of operations where And has precedence over Or.**
   - **You can add as many clauses as needed.**
   - **To remove a clause from the filter, click the Delete button (red X) to the right of the clause.**

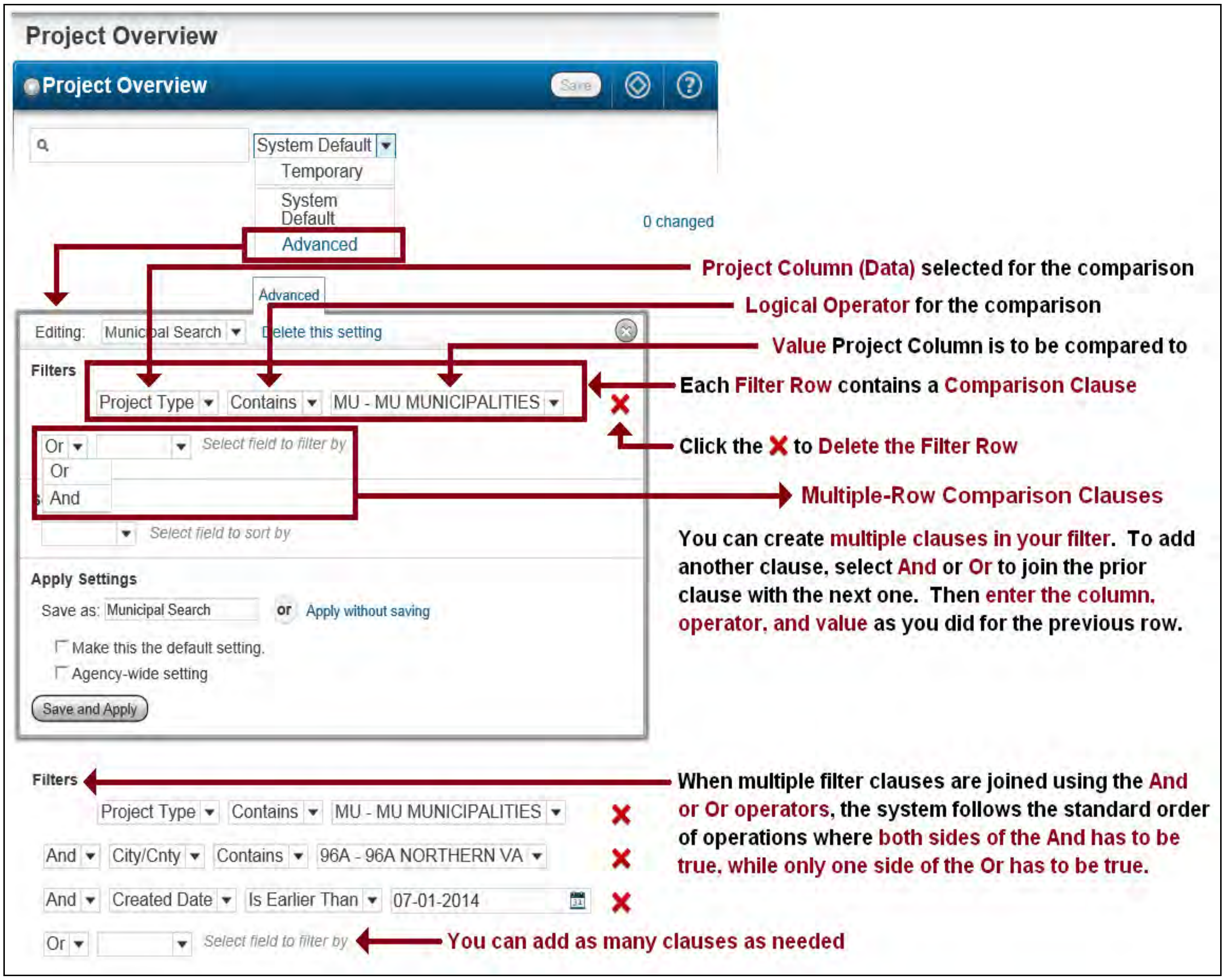


Figure 16 - Creating Multiple-Row Comparison Clauses

The following table from the Help Facility shows **which filter operators can be used with the Advanced Filter** to filter different kinds of data.

- If you filter data with an **inappropriate operator**, all of the data in the list will be filtered out and you will be returned to an empty list. You should not be able to use an inappropriate operator and only **valid operators should be presented** depending on the type of data.

Data Type	**Contains, Does Not Contain**	**Comparisons (=, <, <=, >, >=, ≠)**
Character	Yes	Yes
Numeric	No	Yes. The filter value must be a valid number (for example, *length* cannot be entered as the filter value because it is not a number). **Note:** When a filter is applied to a numeric column, null and blank values within the column are treated as lower than any numeric value.
Date	No	Yes. The filter value must be a valid date. A blank value may only be used with = and ≠.
Longitude/Latitude	Yes	Yes. The filter value must be a valid latitude or longitude in dd:mm:ss.ss format.
Boolean	No	You can only use = and ≠. The filter value must be a valid Boolean (valid formats are y/n, true/false, yes/no).

Figure 17 - Data Types and Comparison Operators

1.7.3 Advanced Sorting

Follow these steps **to create a sort:**

1. Click the drop-down list to **select a field on which to sort.**
2. The list will sort on the field in **ascending order by default**. If you want to sort in a **descending order**, select the Sort descending check box for that field: ☑ Sort descending.
3. You can **add more than one sorting criterion** by selecting a second, third, and additional fields.
   - For example, you can have the Project Overview component sorted first by Created Date, then by Project ID. In this case, the system first sorts projects by the date they were created (in ascending order by default). If two projects were created on the same date, those two are ordered by their Project ID (again, ascending by default).
4. To remove a criterion from the sort, click the **Delete button** to the right of the criterion.

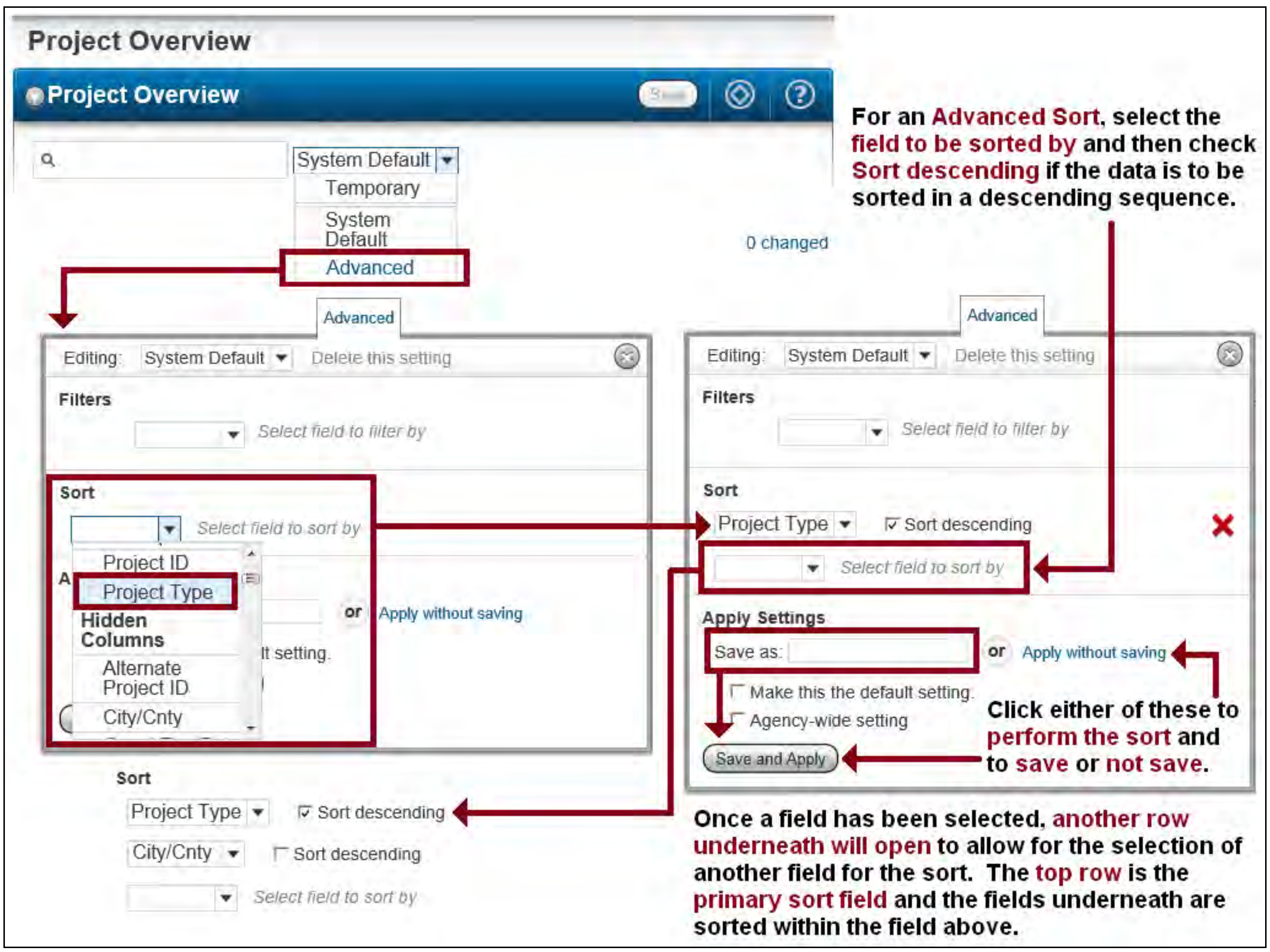


Figure 18 - Performing an Advanced Sort

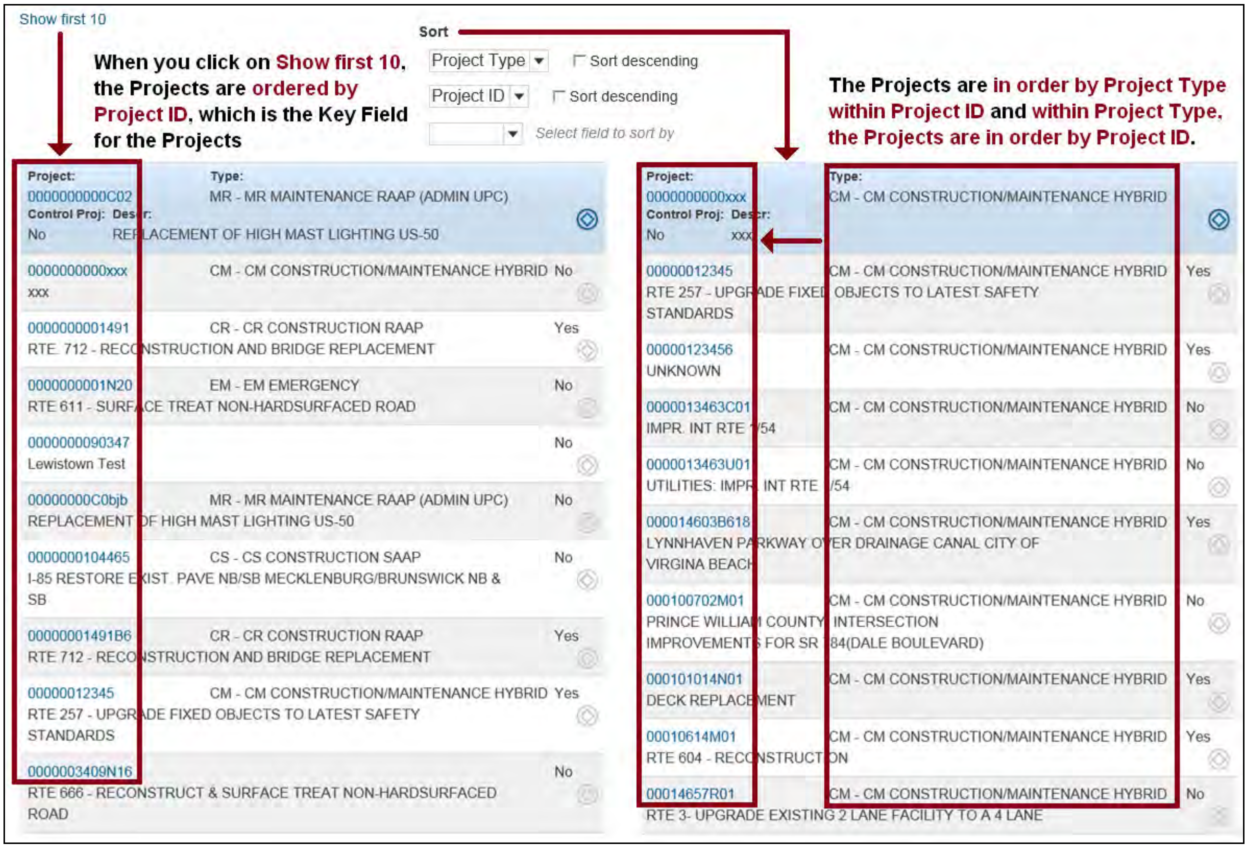


Figure 19 - Order of the Projects when using the Advanced Sort

Apply Settings

If you **do not want to save your settings** and only want to **apply them right now**, click the **Apply without saving link.** The system returns you to the list and immediately sorts or filters the selected component.

If you want to **save your settings,** follow these steps:

1. In the **Save as text box, type the name** by which you want to save the filter or sort. The **name must be different** from any other filter or sort saved by you for this component.
2. If you want the filter or sort to be used as the **default for this component**, select the check box labeled **Make this the default setting.**
3. **Click the Save and Apply button.**

The system takes you back to the list and immediately **sorts or filters the selected component.**

1.7.4 Modifying Saved Settings

You can **save sorts and filters** permanently for **reuse** any time you visit the component.

- Sorts and filters are **associated only with the component on which they are built.** In the examples in this section, the component is the **Project Component.**
- If you want the filter or sort to be used as the **default for this component,** select the check box labeled **Make this the default setting**.
- You **can modify** the filter and sort settings that you save.
- You **cannot modify agency filters.**
- To **modify settings**, open the Advanced Filter overlay and select the filter or sort you want to modify. Change information in fields, operators, and values as needed, then **Save** the changes.

Deleting Saved Settings

To **delete saved filter and sort settings,** open the Advanced Filter overlay and select the filter or sort you want to delete in the Editing field. Click the **Delete this setting** link.

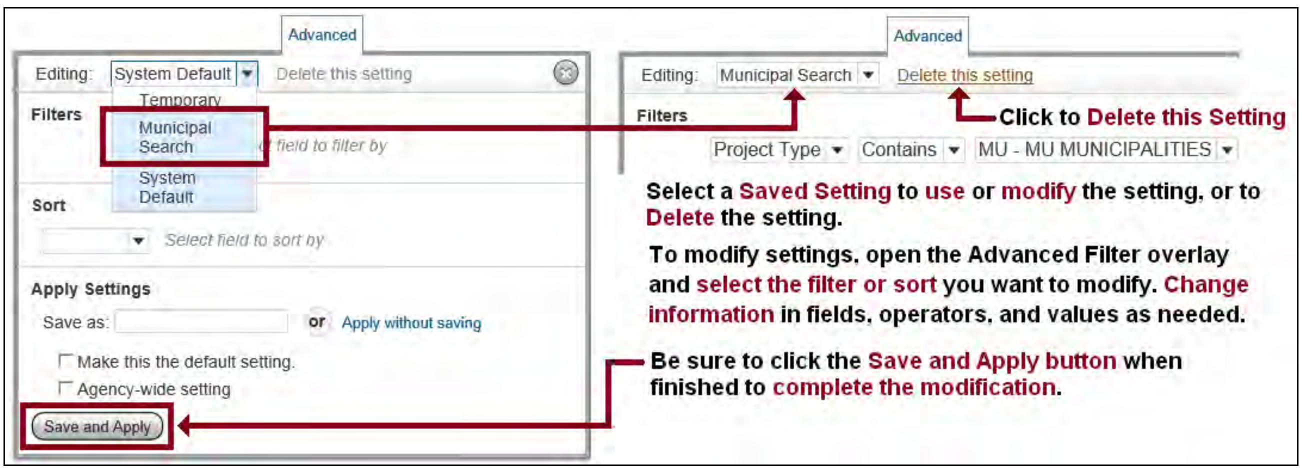


Figure 20 - Selecting and Saving your Settings

1.8 Using Online Help

To get online help, click the **Help button.**

Web Trns*port has an excellent Help facility that **provides information on how to use the system** and may **answer questions you might have about the software.**

- **When you begin to use the software, you might want to review the Getting Started section of the Help.**

There are two places where you will find a Help button.

- **Global Help Button** – this is found in the right corner of the Web Trns*port header, which is found at the top of each screen.
- **Context Sensitive Help Button** – these Help buttons are found on components in the software. The system will initially display information on the functionality of that component only.

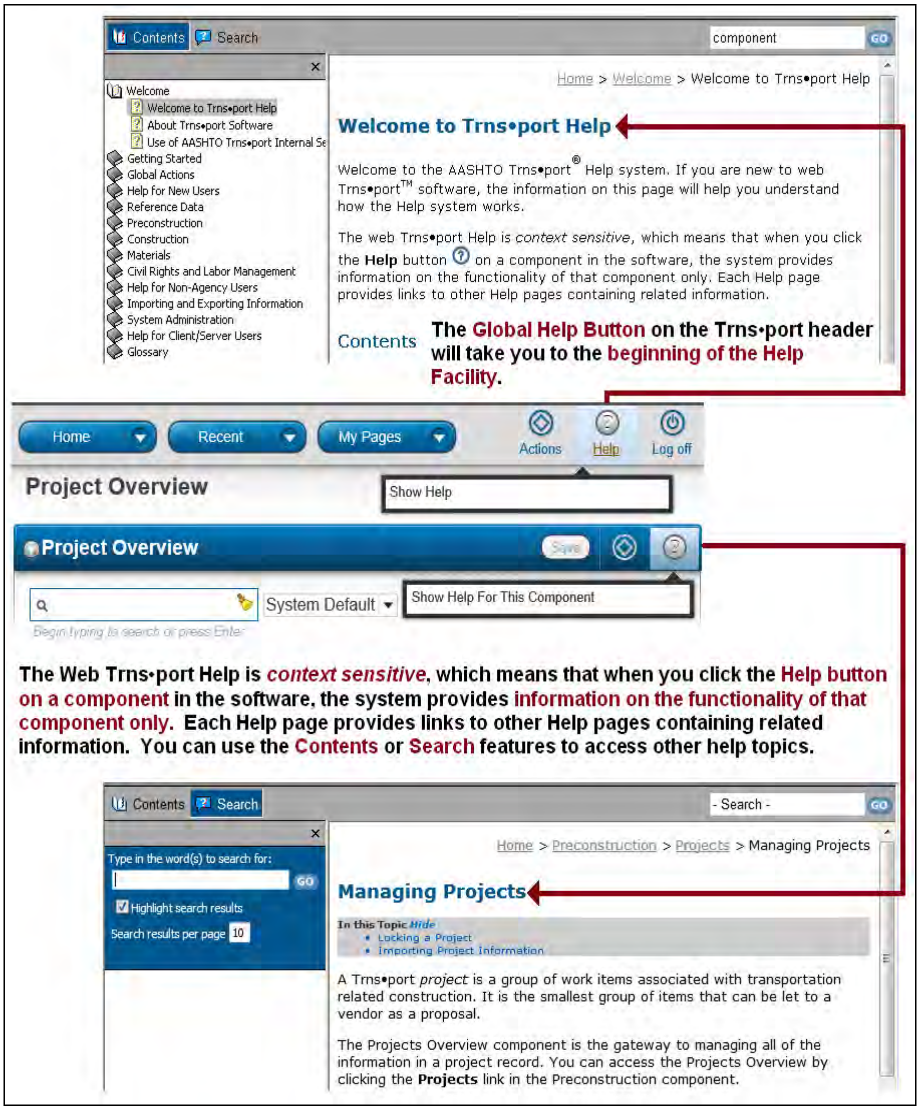


Figure 21 - Accessing Web Trns*port's Online Help Facility

1.8.1 Help Contents Button

You can **navigate the entire Help system** by clicking the **Contents button** in the top left corner of any Help page to open the Help explorer.

- This method of accessing help may be most useful when you already know the section for which you want help.
    - The Help contains many topics that are more general in nature and not linked to a specific component in the software.
- The Contents pane is organized by business category and uses expandable and collapsible books and pages to display the list of topics available in the Help system.
    - You can navigate through the expandable/collapsible books and pages in the left pane of the window to find a desired category and subject.
    - When you double-click on a book, it opens to reveal additional books and help pages. To access a topic, double-click on the desired help page and the topic information appears in the right pane of the window.

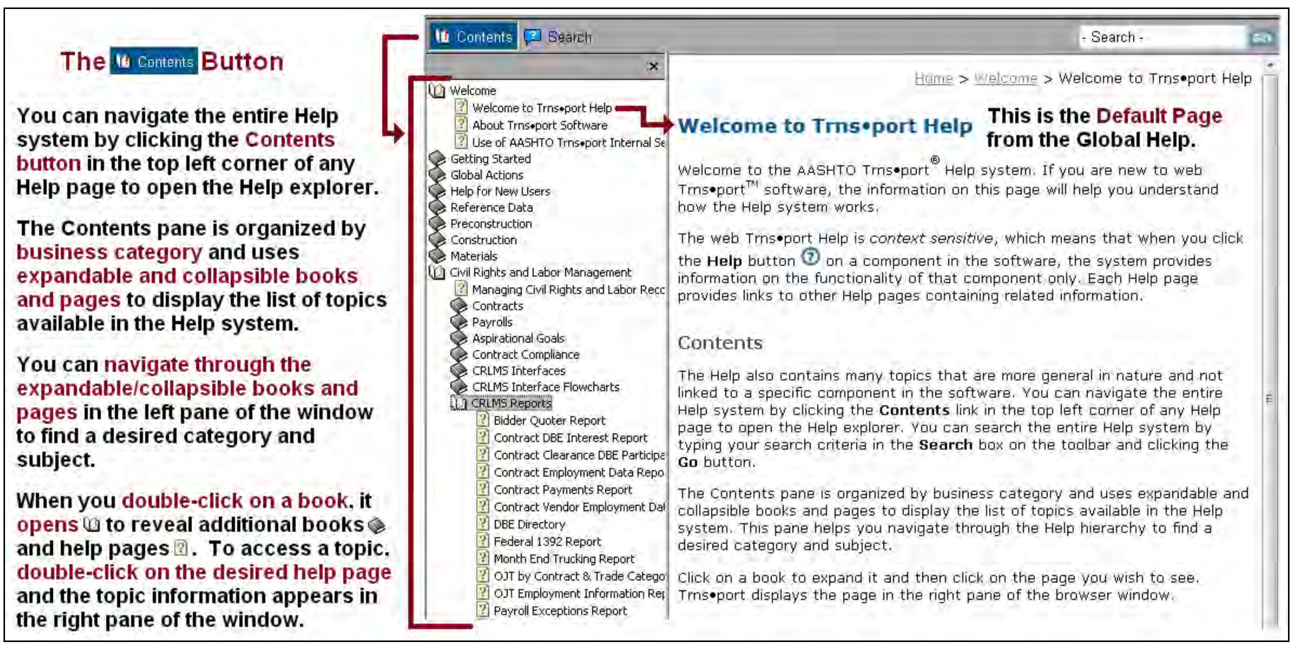


Figure 22 - Using the Contents Button

1.8.2 Help Search Box

The **Search** box provides access to a rapid **full-text search.**

- To use this tab to find a specific topic, **enter the search word, words or phrase** into either search Box and click the **Go button**.
    - **Click the best topic match** from the search results to display the information in the right pane.
    - The search will **rank the search results based on best matches.**
    - Words used in the search are **highlighted** in the help text.
    - The help screen will contain **links** to related topics.

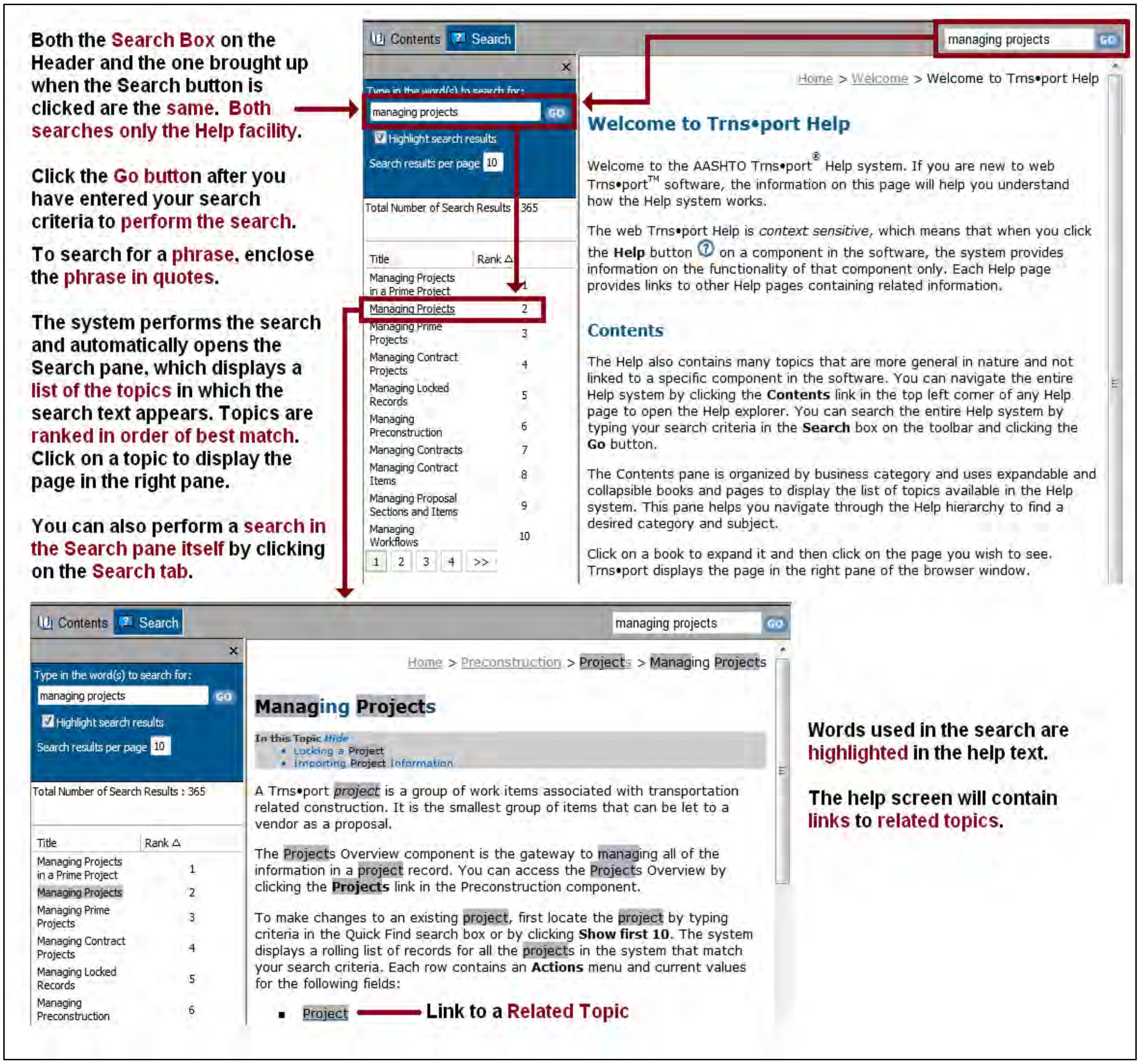
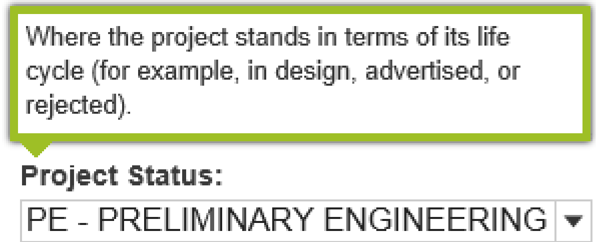


Figure 23 - Conducting a Search on the Help Facility

1.8.3 Field Help

When you **hover over a field,** a window will pop up giving you a **brief description of the Field.**

- All fields displayed will provide this help describing the fields.



2. PROJECTS

This chapter covers adding, changing and deleting projects. Please note that the specifics for entering Maintenance-funded projects are provided in Chapter 3.

Please note that users are encouraged to use all ***UPPER CASE*** *for* ***ALL fields*** *in Web Trnsport*

2.1 Responsibility

Whether you, the user, actually initiate the creation of the project or wait to receive your copy from another user can be determined by the three cases described below:

Case 1: The Project Manager will create the project and make copies to move to the control groups of the other designers/disciplines involved.

- Before copies of the project are sent out, a Prime Project should be created and all of the projects (both the original and any copies) associated to the Prime Project.

Case 2: The designer (who is not a Project Manager) will not create the project. They will find their copy of the project in their listing of projects once the Project Manager has made a copy in their control group. The designer will review this project as submitted to him/her and make appropriate revisions.

- If the designer does not have the project in their project listings, they should contact the Project Manager.

Case 3: For a "stand-alone" project (a project in which no other division will be involved), the designer will create the project(s). A Prime Project must be created, and the project(s) associated to it.

2.2 Adding a Project

The Add Project component opens on the **General** tab, which allows you to add basic information for the new project.

- Click on **Projects** from the Preconstruction Dashboard located on the Home page**.**
- **Click the Project Overview Action button** and **click Add.**

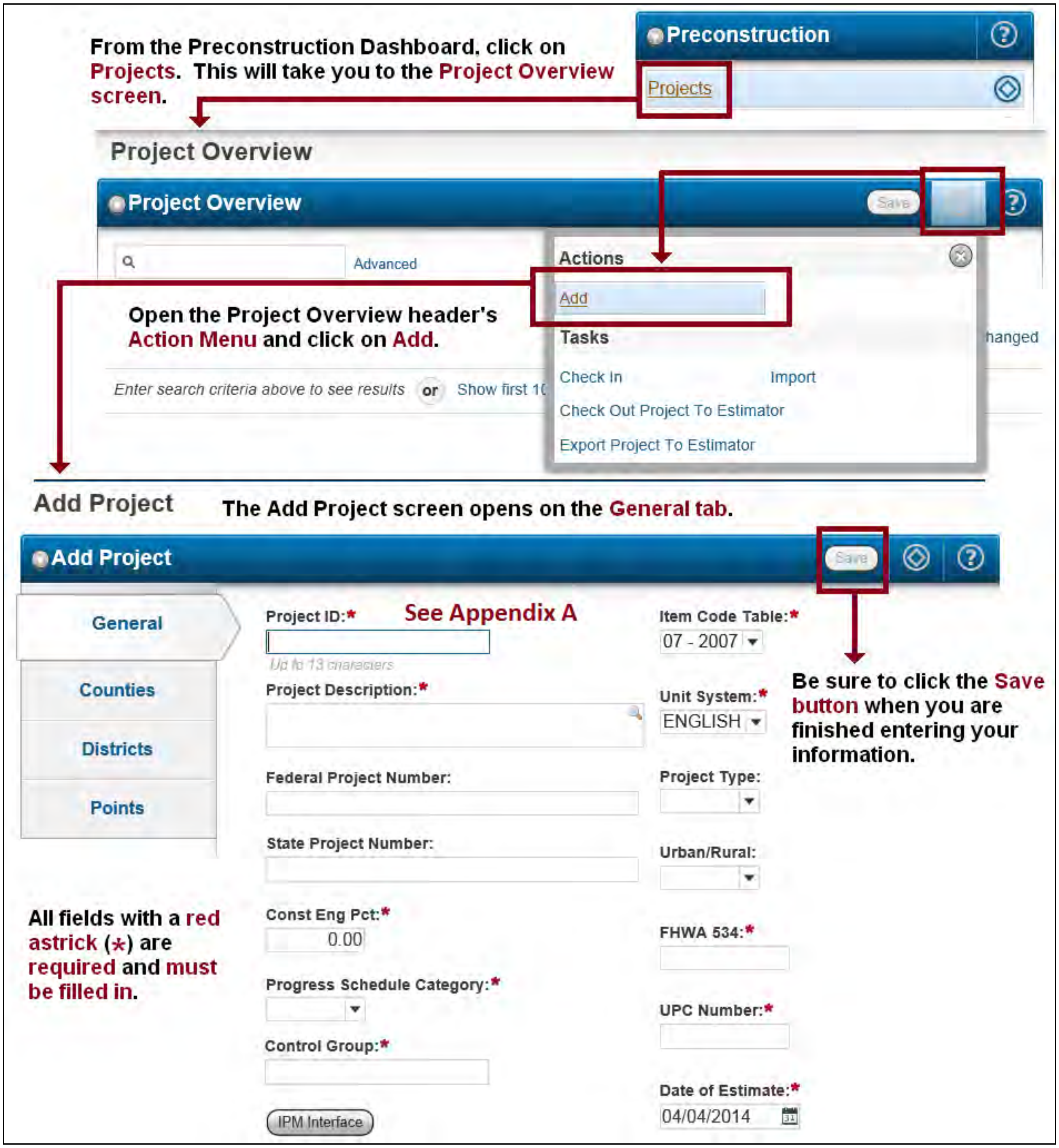


Figure 1 - Adding a Project from the Project Overview screen

The Add project screen requires entry of only the minimum required fields for the database to determine if the Project ID is unique, once the new project is saved then the user will complete the remaining fields.
__Please note that users are encouraged to use all UPPER CASE for ALL fields in Web Trnsport__

The following fields are required (indicated by a **red asterisk** *) when adding a new Project:

1. Project ID (See Appendix A for complete rules and instructions)
2. Project Description
3. Progress Schedule Category (See Appendix H)
4. Control Group
5. Item Code Table
6. Unit System
7. FHWA 534
8. UPC Number (must be 8 digits)
9. Date of Estimate

The **Add Project screen will display four tabs**: General, Counties, Districts and Points.

- The remaining Project Summary tabs – Road Segment, Bridge Segment and Workflow will not appear until you have saved the Add Project screen and go to the Project Overview screen and retrieve the newly added Project.
- To save the newly added project, click the **Save** [Save] **button** found on the right side of the Add Project header.

Saving the Project and Correcting Errors

When all tabs of the Add Project screen have been completed or when you are ready to save your data, click the **Save** **button** to insure that all information entered has been saved.

- If you have completed all required field criteria satisfactorily and the Project ID (PCN) is a unique number, the project will be added/saved.
- The Project ID field can be changed as long as you are on the Add Project screen, even if the project was previously saved on that screen.
- Once you navigate away from the Add project screen, then you can only return to that project by way of the Project Summary screen. **The Project ID field will convert to display-only and cannot be changed.** This ensures unique Project ID's in the database.
- If a required field was not filled-in or incorrect data entered at a field which is supported with a reference table, an **Error** box will display. For example, if you left a required field blank or entered invalid data, you will see an **Error** box at the top giving information as to what field was left blank or contains an invalid value.
- If you attempted to create a project with a Project ID already in existence in the Trns·port database, you will see an **Error** box with the message that the Project ID (the primary key) is already being used by another project. A project could already exist in another control group with the Project ID you have just attempted to create. Trns·port will not allow duplicate Project IDs.

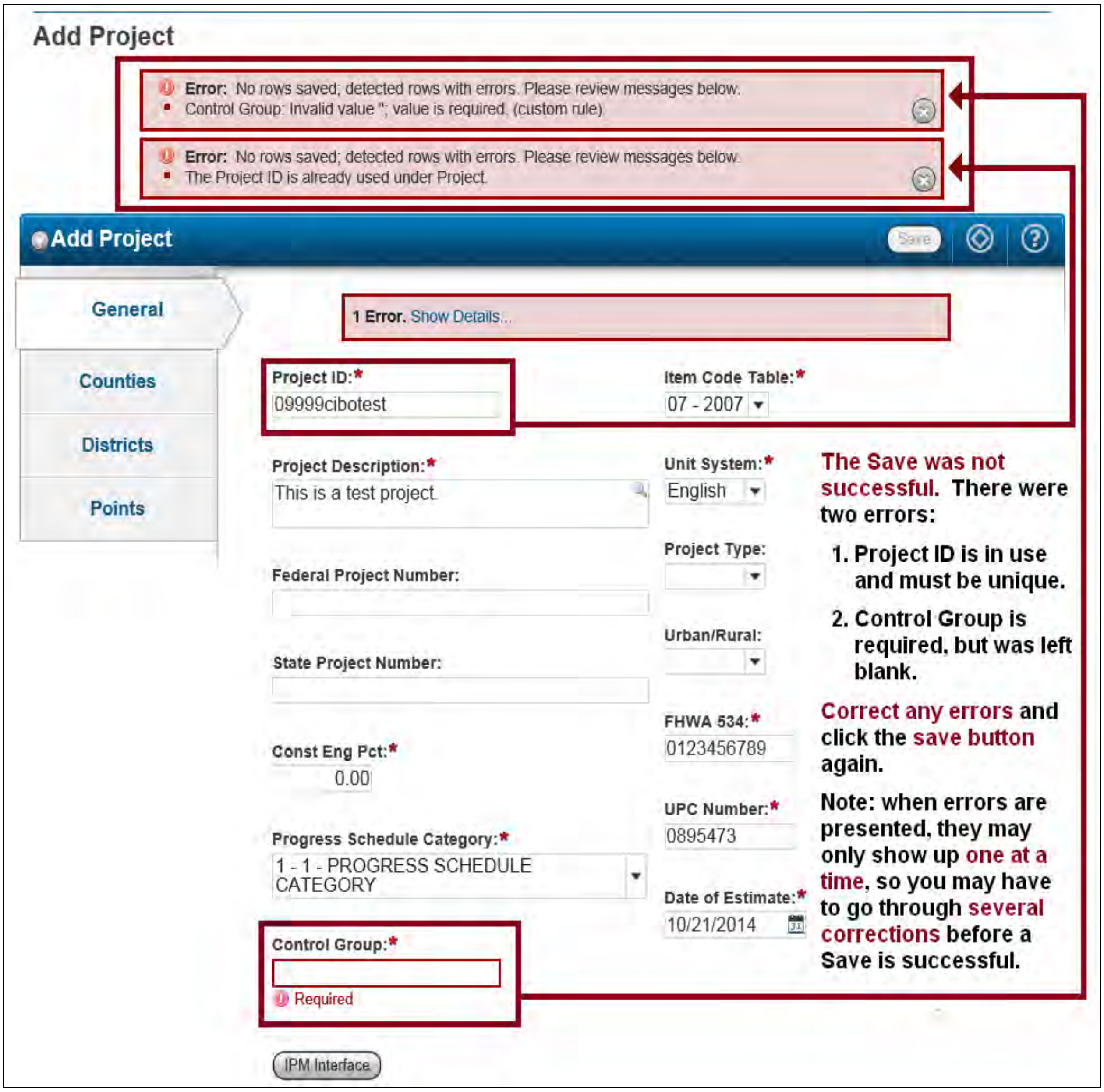


Figure 2 - Required Field, and Incorrect or Missing Data Errors

Note: when any errors are presented, they may **only show up one at a time**, so you may have to go through **several corrections** before a save is successful.

Errors must be corrected before the project record will be accepted into the database.

2.3 Complete Remaining Fields

Return to Project Overview and Retrieve the New Added Project

Once you have saved your Project and the required fields on the General, Counties, Districts and Points tabs, **click the Overview link**, enter the new project's UPC Number and complete the remaining fields by entering the **Road Segment** tab, **Bridge Segment** tab and **Workflow** tab information.

Figure 3 - Retrieving a Project from the Project Overview Screen

To complete the Project:

1. Click on the **Overview quick link** at the top left of the Add Project screen or click on the **Home button** and then click on **Projects** from the Preconstruction Dashboard located on the Home page**.**
   - This will take you to the **Project Overview screen.**
2. Clear out the Search by **clicking on the broom**, and then **enter the UPC Number.**
3. The **Project Summary row** will come up. **Click on the Project ID to open your Project.**

The **Project Summary screen** is now open on the General tab.

2.4 General tab

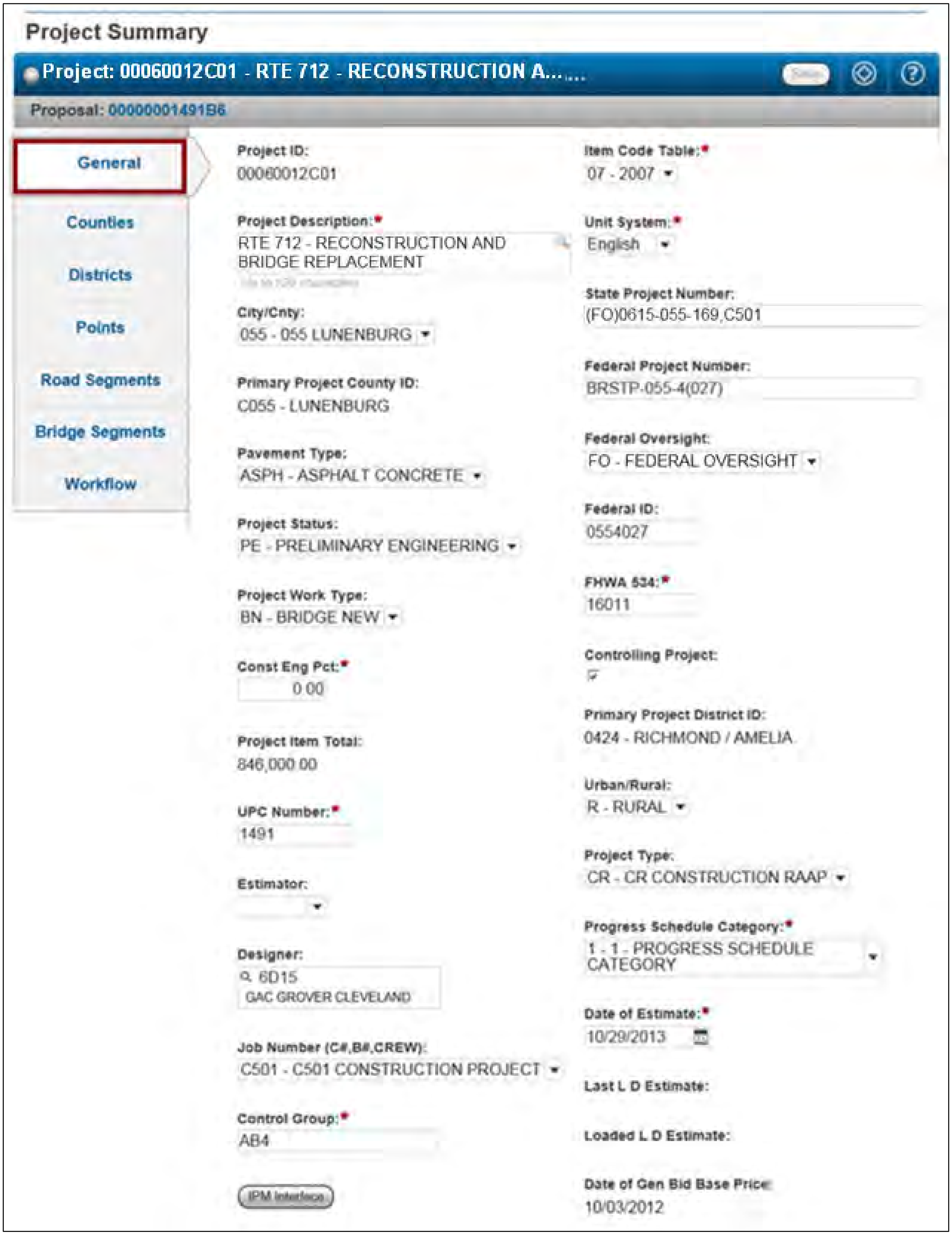


Figure 4 - The General Tab Fields

Use the **[TAB] key** to move between fields and enter the project information on the General tab.

Some fields have **Reference Tables.** As you [TAB] to such a field, a drop-down arrow will appear. A selection MUST be made from the available choices in the table.

GENERAL TAB FIELD DESCRIPTIONS:

Project ID Required: required - The Project ID and Control Number (PCN) may consist of as many as 12 characters (13 characters are required for maintenance-funded (Maintenance Division) projects). Refer to **Appendix A** for Project ID instructions. (Once the project is completed and added to the database, this field becomes display-only and cannot be changed.)
Examples: 000050057C01 or M514SSB104463

Project Description Required: For all projects (other than bridge), enter the description of the type of work being performed on this project. The description from iPM is the best source. For Bridge projects, enter the description from the front sheet title block of the plan set.

City/Cnty: Select County or City in which the project is located from the drop-down menu which should match the State Project Number. Appendix C & D includes County & City codes and appropriate conversions when required.
Ex.: Project number is 0615-047-169. County/City Code is 047.

Pavement Type: Select the appropriate code from the drop-down menu.

Pavement Type Code	
Code	**Description**
ASPH	Asphalt Concrete
BITC	Bituminous Concrete
BITP	Bituminous Penetration
COMB	Combination Asphalt & Concrete
GRDE	Grade & Drained Earth
GRVL	Gravel or Stone
MIXB	Mixed Bituminous
OTHR	All Others
POCC	Portland Cement Concrete
PRIM	Primitive
UNIM	Unimproved

Project Status: Status of the project. Select the appropriate code from the drop-down menu.

Status Table	
CE	Conceptual Estimate
CON1	Construction (1st Submission)
CON2	Construction (2nd Submission)
FI	Field Inspection
LAS	Passes to LAS
PE	Preliminary Engineering
PFR	Preliminary Field Review
PH	Public Hearing
RWS	Right of Way Stage
SR1	Secondary Roads Project Initiative
SYP	Six Year Plan

Project Work Type: Select the appropriate code from the drop-down menu. See Appendix E for a complete listing.

Const. Eng. Pct. Required: Refer to Chapter 5.3 for complete details.

Project Item Totals: This field populates automatically.

UPC Num Required: Enter the UPC number of the project, **you must add leading zeros to the UPC number to total 8 digits in this field**. This field populates through the Prime to iPM. Note that this field must match in all Projects under a Prime.

Estimator: This field designates the individual performing the independent Evaluative Estimate in the Construction Division. Select the appropriate code from the drop-down menu.

Designer: This field designates the individual entering the estimate in Web Trnsport. Select the appropriate code from the drop-down menu.
Note: All VDOT users should have their name in the list. If your name is not in the list please contact TRNSPORTSupport@vdot.virginia.gov. Consultants may find their firm/company name in the list.

Job Number (C#, B#, CREW): This field derives from the State Project number. Select the appropriate code from the drop-down menu. Ex: C501

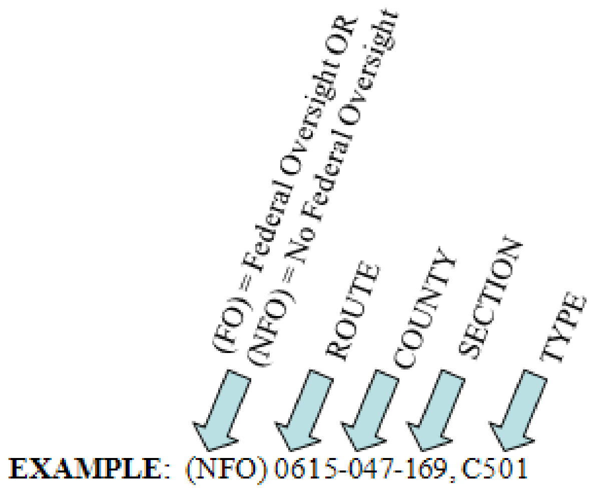
Control Group **Required**: The control group is the security designation which decides which user has access to which project(s). This field populates automatically with your control group when creating new projects. The data in this field may be changed in order to transfer a project to another person/control group.

IPM Interface button: Refer to section 2.4.1 for complete details. Please note this feature only functions for VDOT employees.

Item Code Table **Required**: Select from the drop-down menu. This coincides with the current Road and Bridge Specifications manual.
07 = English projects or 08 = Metric projects.

Unit System **Required**: Defaults to E (English Project). Enter M for a Metric Project.

State Project No.: Enter the state project number in its entirety, complete with dashes, commas, etc.



Federal Project No: **Required**: Enter the Federal Project Number, if applicable, in its entirety, complete with dashes, parentheses, etc. If the project is not federally-funded, enter NONE. **Ex.:** NH-5401(876)

Federal Oversight: Select the appropriate code from the drop-down menu. Reminder: The (NFO) or (FO) designation should be included in the State project # field.
NFO = No Federal Oversight
FO = Federal Oversight
N/A = State Project

Federal ID: Enter only the **numbers** of the Federal Project Number, with no punctuation, no alpha characters, and seven digits maximum. Even though the field accepts characters, only the Federal Project Numbers or the word "NONE" should be entered in this field.

EXAMPLE: Fed. Project No. is STP-5A03(264)
Enter, in this field, **503264**

If the project **does not have a Federal Project Number**, enter **NONE**.

FHWA 534 Required: Enter the five alpha-numeric characters which follow "FHWA 534 DATA" (This code can also be found in the Project Pool of iPM, under the general tab)

Controlling Project Checkbox: Should be checked for the project containing the most money. See Chapter 8 of this manual for details.

Primary Project District ID: This field populates automatically.

Urban/Rural Class: Select the appropriate code from the drop-down menu: U, R or S.

Project Type: Select the appropriate code from the drop-down menu.

Project Type Code	Use	When
CR	when adding capacity	Regular advertisement
CS	when adding capacity	SAAP advertisement
CMMR	when maintenance only (not adding capacity)	Regular advertisement
CMMS	when maintenance only (not adding capacity)	SAAP advertisement
CMSR	when maintenance schedule only	regular advertisement
CMSS	when maintenance schedule only	SAAP advertisement
These types must have unique UPC's that are opened to phase 9104 and x31 activities		

Progress Schedule Category Required: Select the appropriate Progress Schedule from the drop-down menu.

For description of codes or references, See **Appendix H** or open this link:

http://www.virginiadot.org/business/resources/const/projectcategories.pdf

Date of Estimate Required: When you first add the Project, this field will be automatically populated with the **current date**.

- Each time the project is **revised and saved**; this date should be changed to reflect the revision.
- To change the date, click the **Calendar** **Icon** and select the new date.

Last L&D Estimate: This field populates automatically.

Loaded L&D Estimate: This field populates automatically.

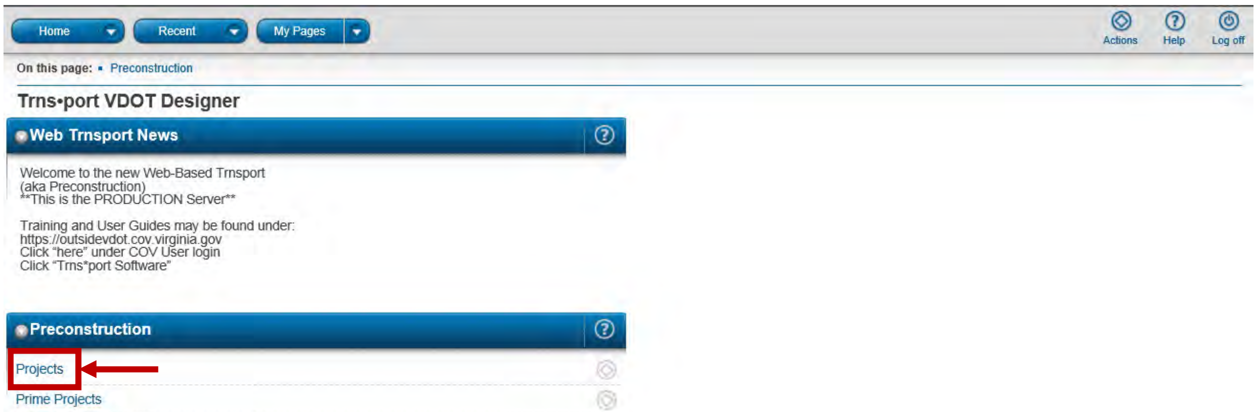
Date of Gen Bid Base Prices: This field **no longer populates automatically**, users should fill in this field every time they price Items and/or Category Items.

2.4.1 iPM Interface

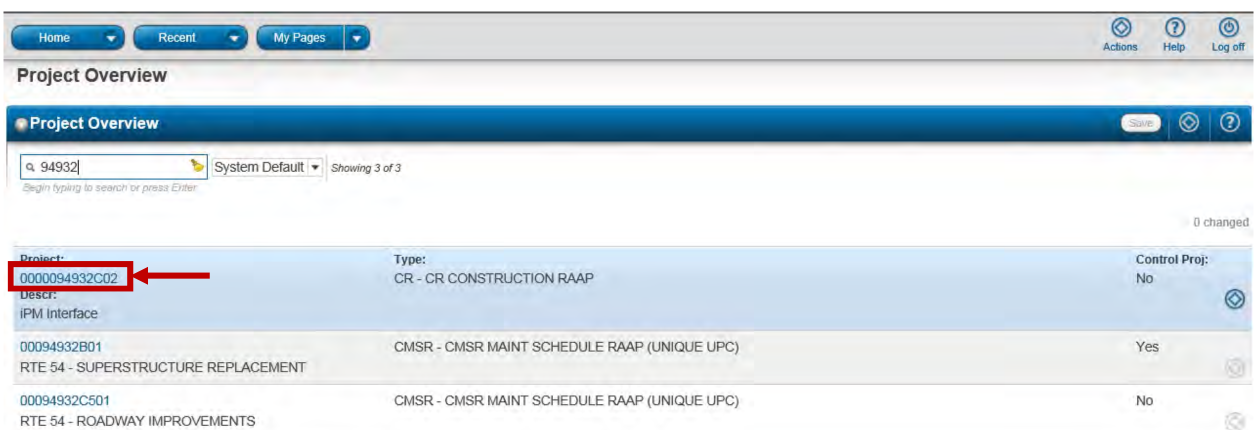
Trnsport now has an interface that will pull the general project data from iPM and transfer the data into the fields of Trnsport. The project in iPM is associated by the UPC field in Web Trnsport to pull the correct data so it is crucial that the UPC field be filled out correctly. In order for this interface to work, the user must have security access to iPM.

First the user will have to create a new project in Web Trnsport as a placeholder for the data to pull to. See Adding a Project in the User's Guide for instructions.

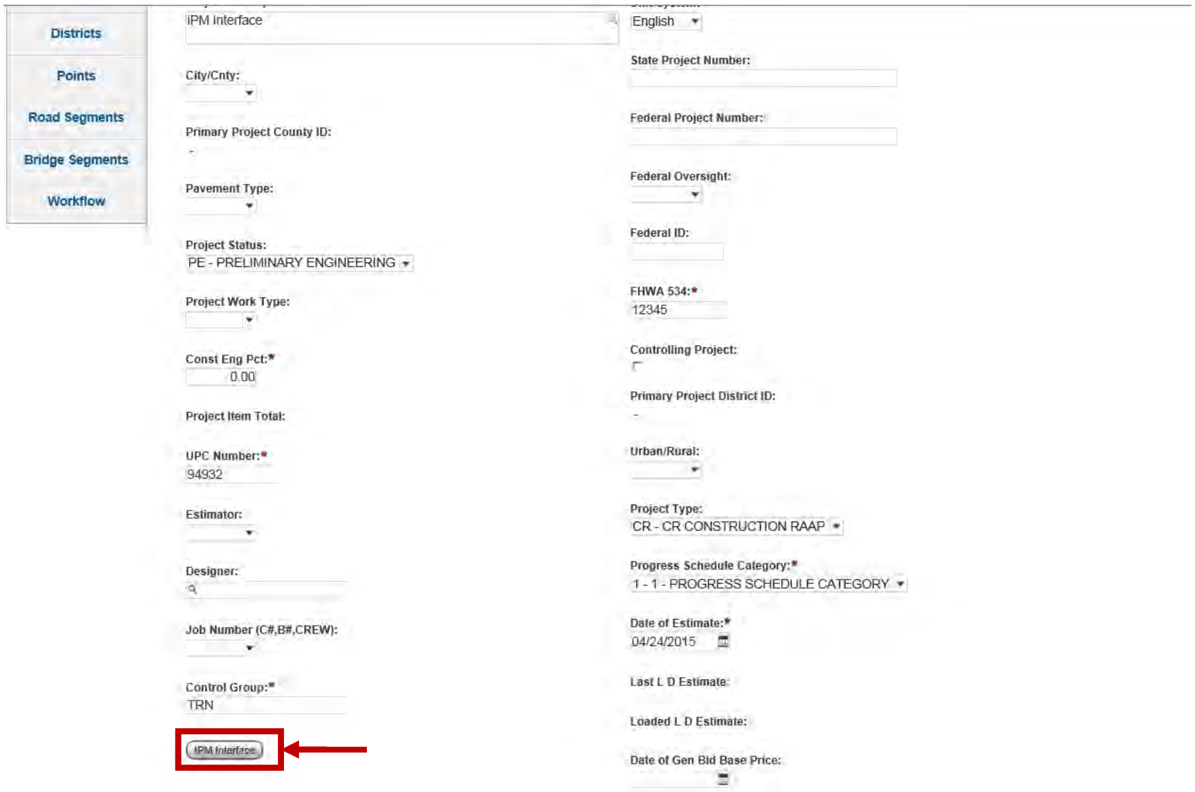
Find your project in the project list once you have added a project to Trnsport. From the Home Screen select **Projects**.



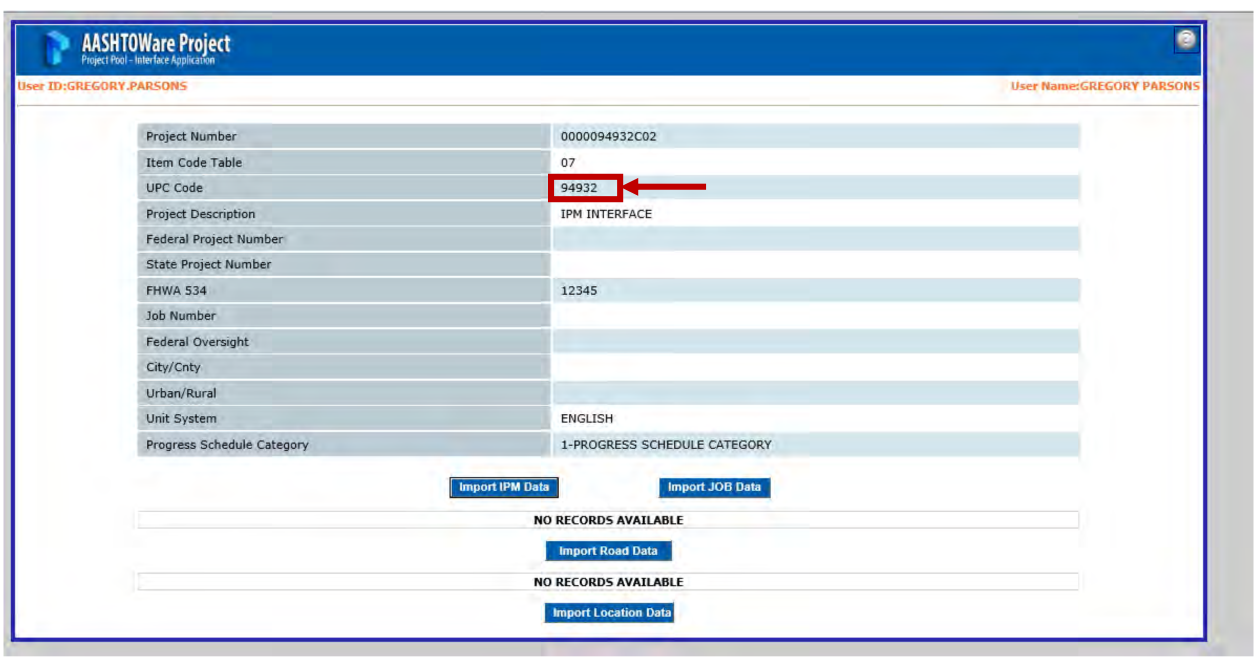
Type your Project ID into the Search box on the Project Overview Screen. Click on the Project ID once you have found your project



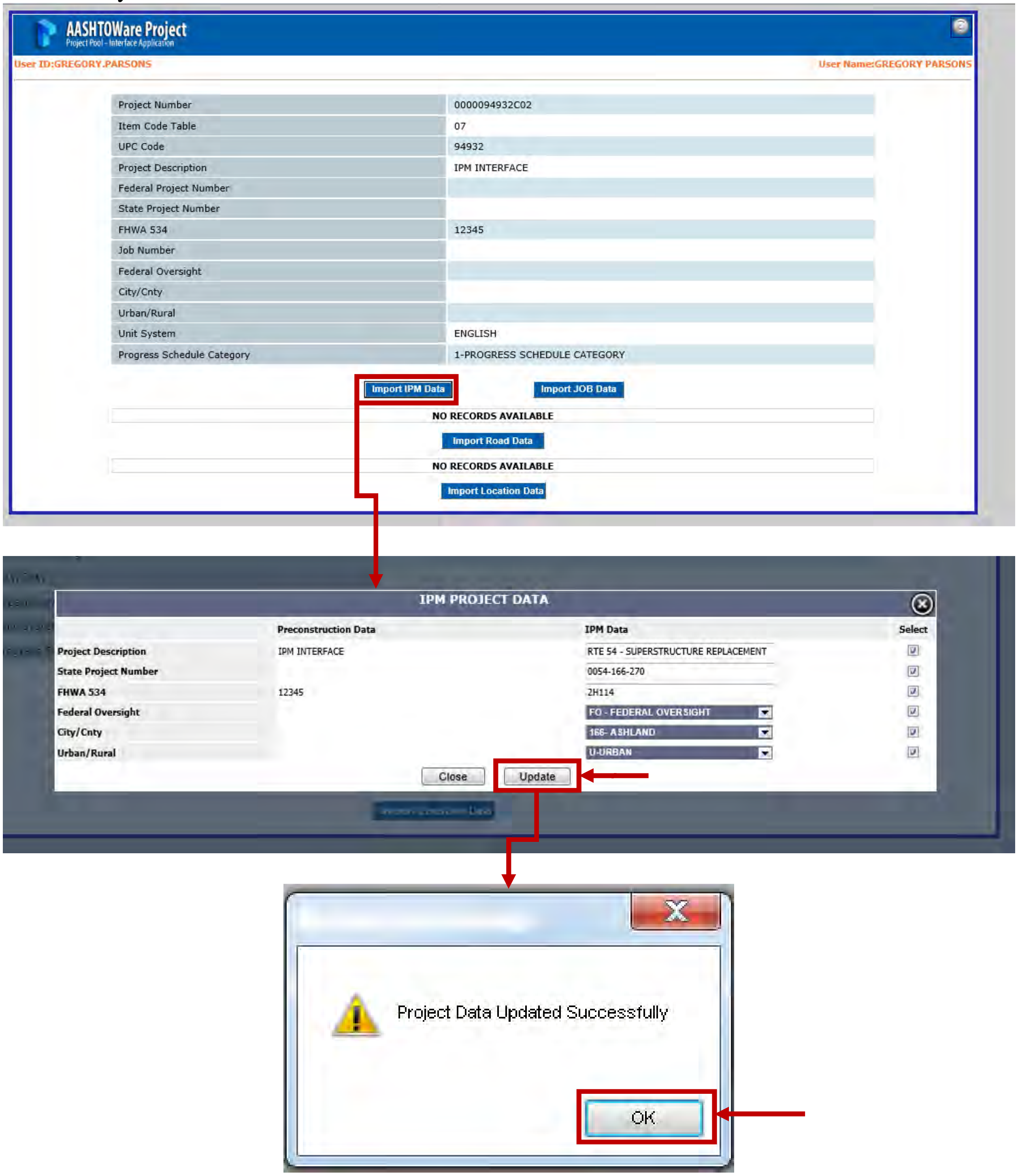
You are now in the Project on the General Tab. Scroll to the bottom of the page and select the button **IPM Interface**.



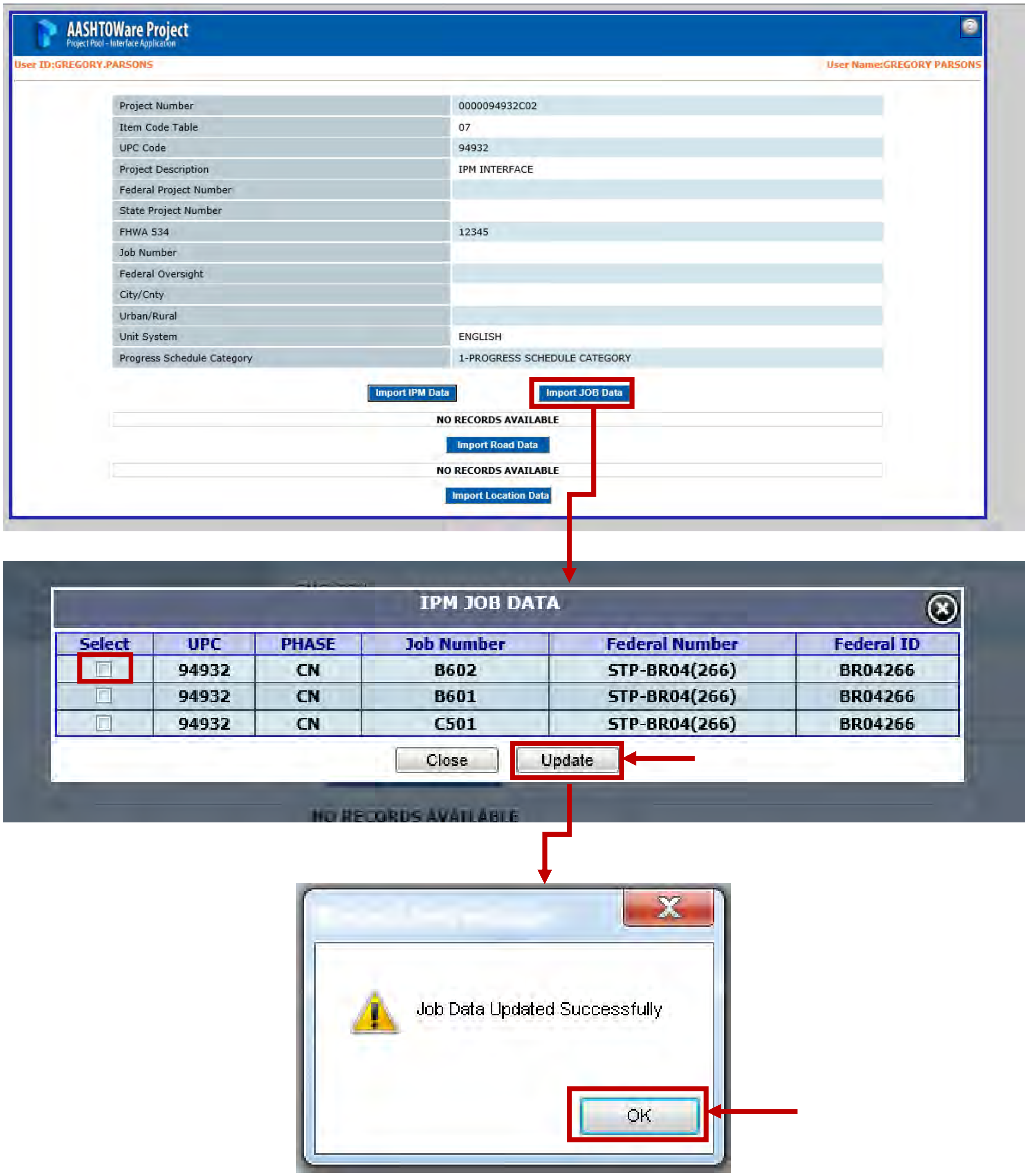
The iPM interface will open a new window on your web browser. This page will show the current data you have on your project in Trnsport. Verify that the UPC Code is correct before moving forward..



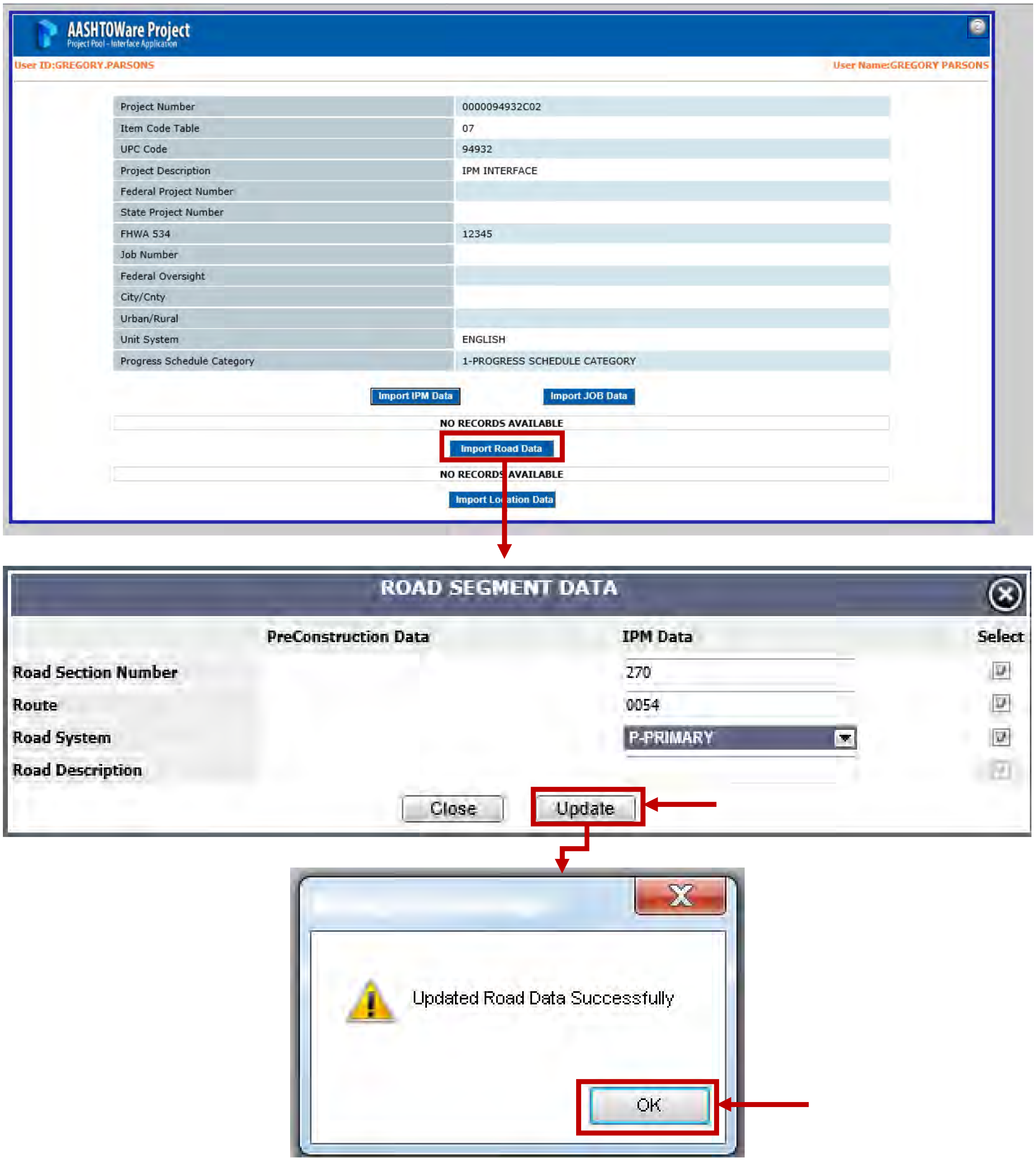
Select the **Import IPM Data** button. A new widow will appear. The column on the left displays the current data you have in Trnsport and the column on the right displays the data in IPM. The Select checkbox beside each row allows you to choose which fields you want to overwrite with iPM Data. Click the **Update** button to import the iPM data or the **Close** button to cancel importing those fields to Trnsport. You will receive a message that the data updated successfully. Click **OK** to return to the IPM main screen.



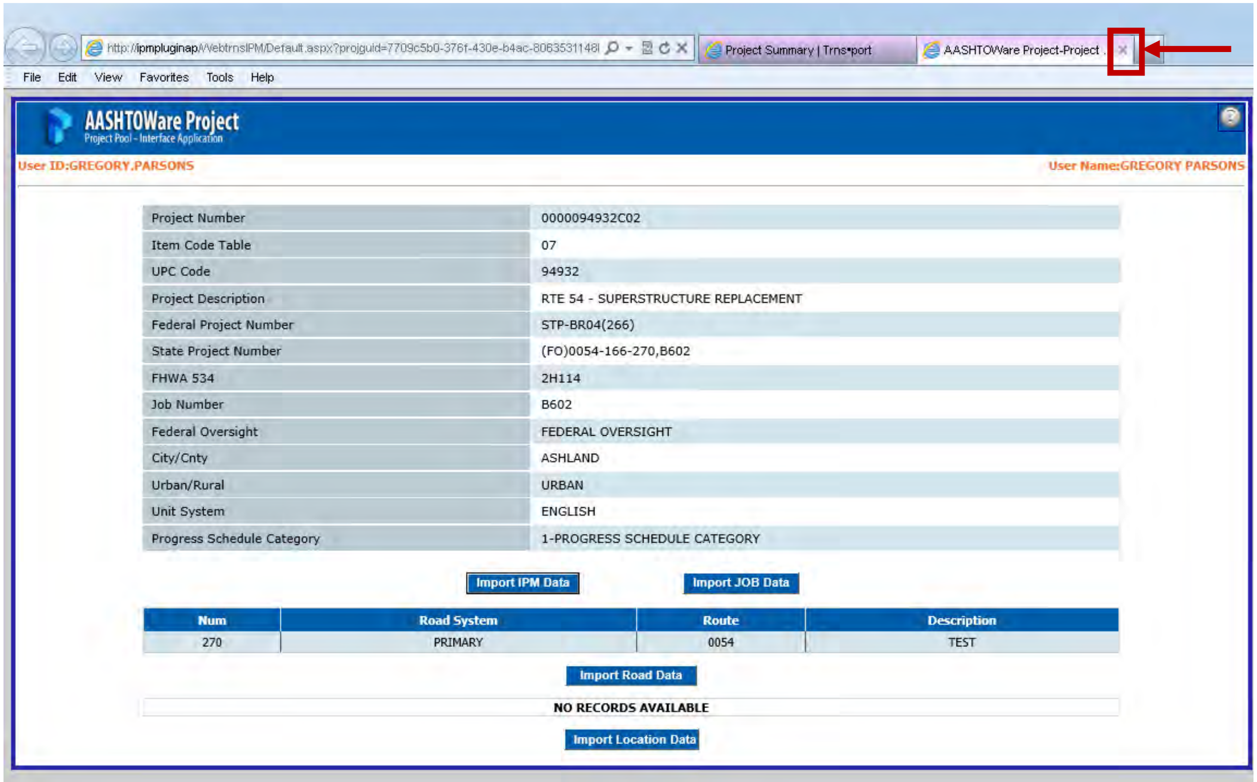
Next, select the **Import Job Data** button. A new window will appear with the IPM Job Data. Depending on the UPC, there may be multiple selections associated to the project. The Select checkbox allows the user to select which job they would like to import. Click the **Update** button to import the iPM data or the **Close** button to cancel importing those fields to Trnsport. You will receive a message that the data updated successfully. Click **OK** to return to the IPM main screen.



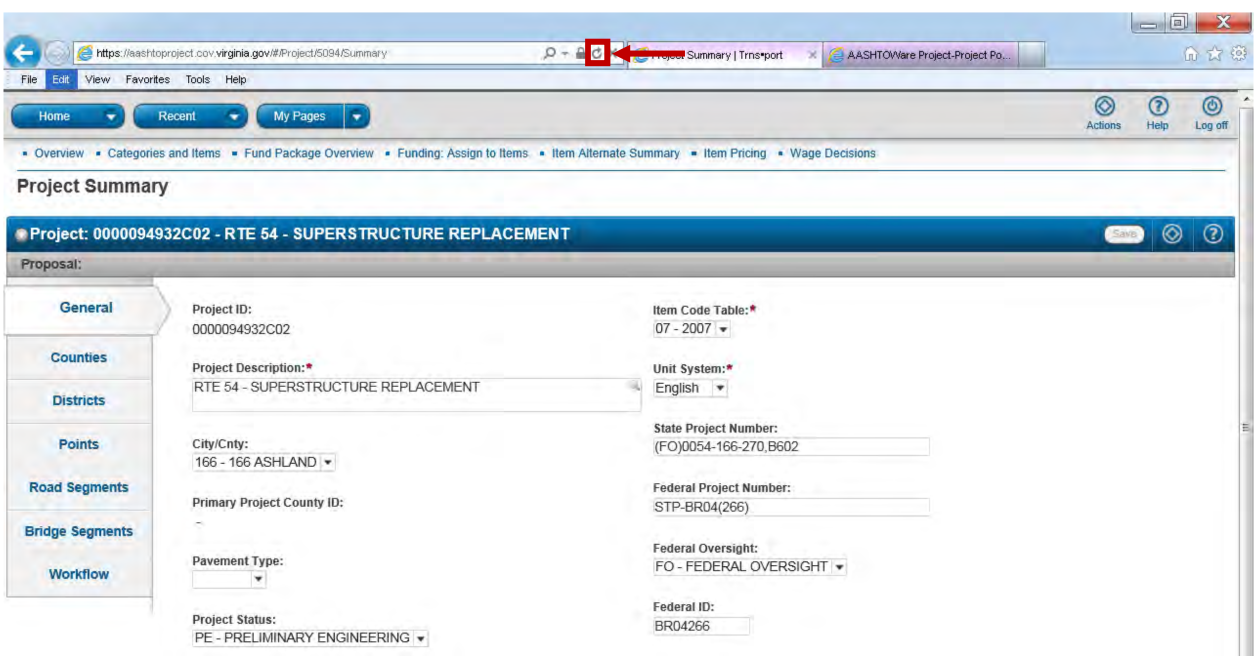
Click the **Import Road Data** button. A new window will appear with the Road Segment Data. The left column displays the data currently in Trnsport and the right column displays the data currently in iPM. The Select checkbox beside each row allows you to choose which fields you want to overwrite with iPM Data. Add the route in the Road Description field. Click the **Update** button to import the iPM data or the **Close** button to cancel importing those fields to Trnsport. You will receive a message that the data updated successfully. Click **OK** to return to the IPM main screen.



After updating the Trnsport information with iPM Data, close the iPM interface web browser window.



Notice that the Trnsport data is not showing the new iPM Data. This is because the database has been updated since your last page refresh. Select the **F5** key to refresh your page. Notice that the data from iPM is now displayed on your project.



2.5 Counties, Districts and Points tabs - Associating these to a Project

Counties tab

Each project must have <u>one, and only one, county</u> associated to it and its Percentage <u>must equal 100%</u>. Failure to associate a county will prevent the generation of the preliminary detail estimate report.

- Click on the **Counties tab** to bring up County information.

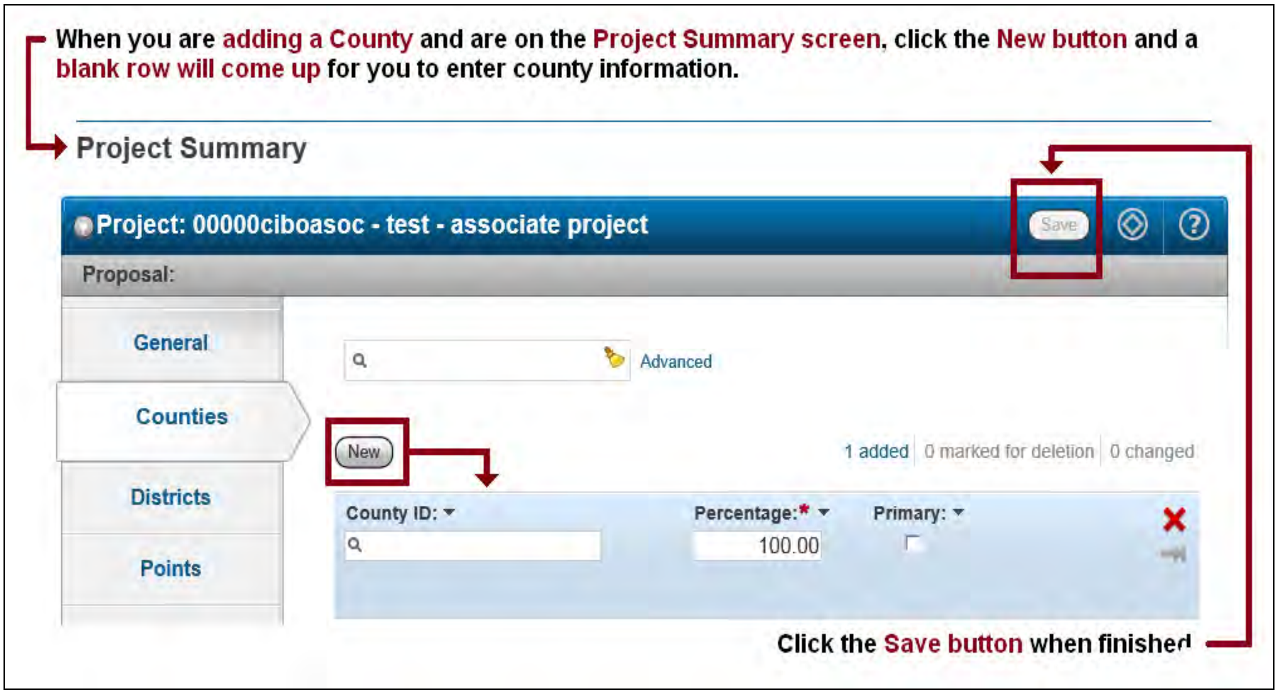


Figure 2 - The Counties tab

To add a County:

1. When the **Counties tab** is displayed, if it is not showing a blank row, click the **New button** and enter the following information:
2. **County ID: t**his is a search field. Enter the **county number or name** and then select the appropriate code from the drop-down menu. See **Appendix D** for a complete listing.
3. **Percentage:** this is a **required field** and will **default to 100.**
   - This is the percentage of the Project that is associated with this County.
4. **Primary: Checkbox –** This should always be checked.
   - **One county must be flagged as the Primary County**, which is the **controlling county.** Since the County Percentage must be 100%, this county must be flagged as Primary.
5. When the county information has been entered, click the **Save button**.

2.5.1 Deleting a County from a Project

To **remove** a **County** from a Project, select the Counties tab and select the County row's Action Menu and select **Delete.** After the row turns grey, click on **Save** to complete the delete.

To **change a County to a different County**, go to the Counties tab and select the County ID field and change to the new **County ID,** and then select **Save**.

2.6 District Tab

Each project must have at least one District associated and can be found in iPM.

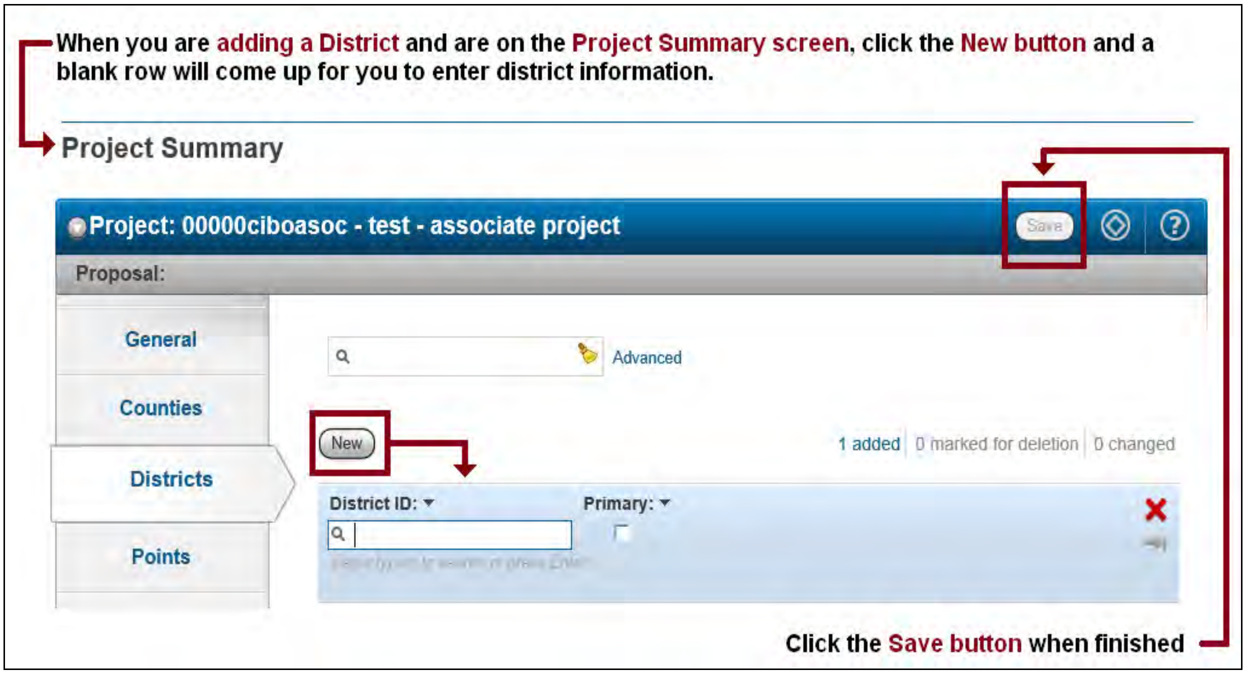


Figure 3 - The Districts tab

To add a District:

1. When the District tab displays, if it is not showing a blank row, click the **New button** and enter the following information:

2. **District ID:** This is a search field**.** Hit the **Enter key** or enter all or part of the District number or name and select the appropriate **District** from the drop-down list.

District	District No.
Bristol	1
Salem	2
Lynchburg	3
Richmond	4
Hampton Roads	5
Fredericksburg	6
Culpeper	7
Staunton	8
Northern VA	9

3. **Supplemental Description**: This field should be **left blank.**

4. **Primary: Checkbox –** This checkbox indicates that the District is the **first or principal district** in which work will be performed for this project.

   - If there are **multiple Districts**, then **one District must be flagged as the Primary District** and contains the majority of the work.

2.7 Points Tab

The Points tab provides the "From and To description", and the longitude and latitude for the project

- All fields on the Points tab are **required** when you access this tab, enter data and save it.

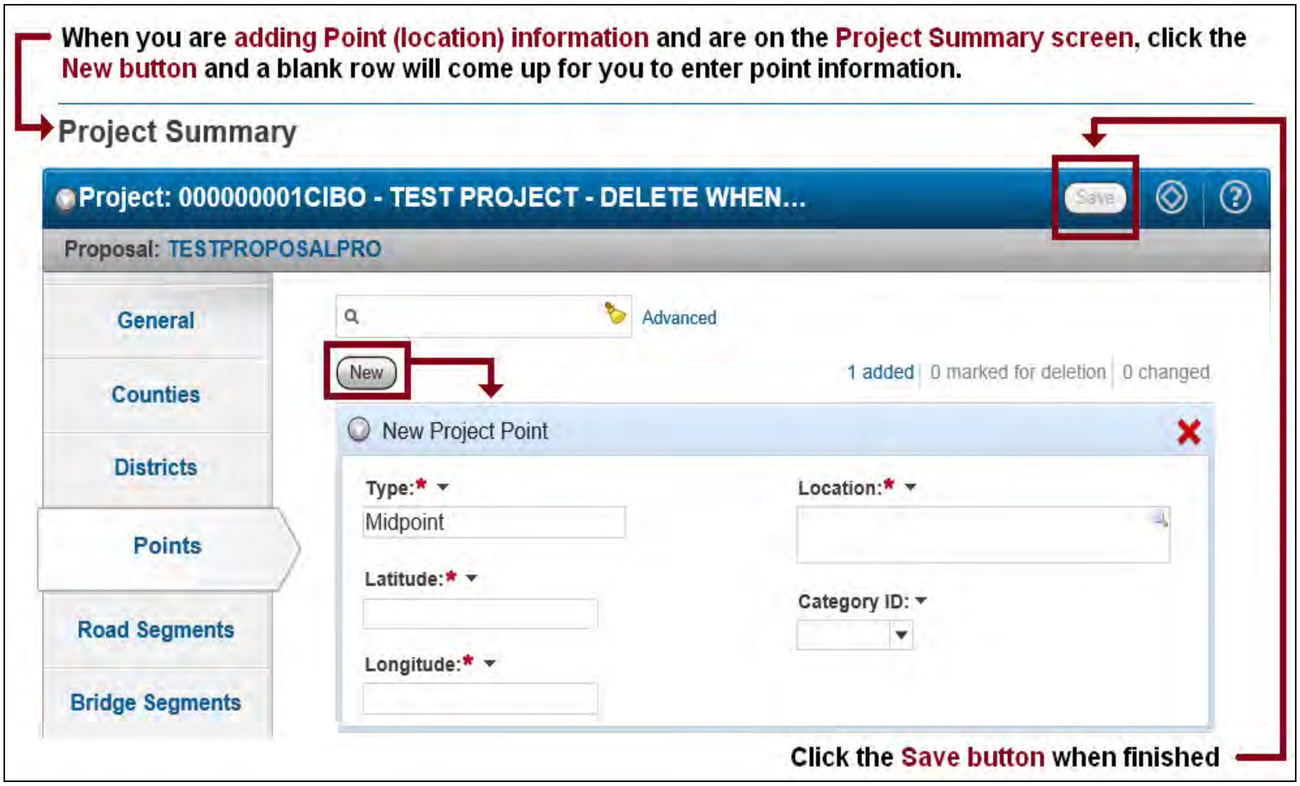


Figure 4 - The Points tab

To add Points (location) information:

1. When the points tab comes up, if it is not showing New Project Points segment, click the **New button** and enter the following information:

2. **Type field Required**: This field will default to **Midpoint** and can only be **Midpoint**.

3. **Latitude field Required**: Enter the Latitude. Entering punctuation is not required. The negative and decimals are not allowed or required in this field.

4. **Longitude field Required**: Enter the Longitude. Entering punctuation is not required.

5. **Location field Required**: Enter the **From: __ and To: __ from IPM.** Be sure to hit the **Enter key** after the From sentence has been entered.

Note about Long/Lat: If a project spans a large area, provide the Long/Lat at the center of the work area. The Long/Lat fields are used by the Civil Rights Division to determine DBE goals using a 75 mile radius from the point provided.

2.8 Road Segments tab

A road segment is a portion of a road that can be described by a set of starting and ending stationing. A Road Segment should be created for each road on the project.A road segment can be used to locate a specific section of a road as the site for a project's work or a portion of the project's work.

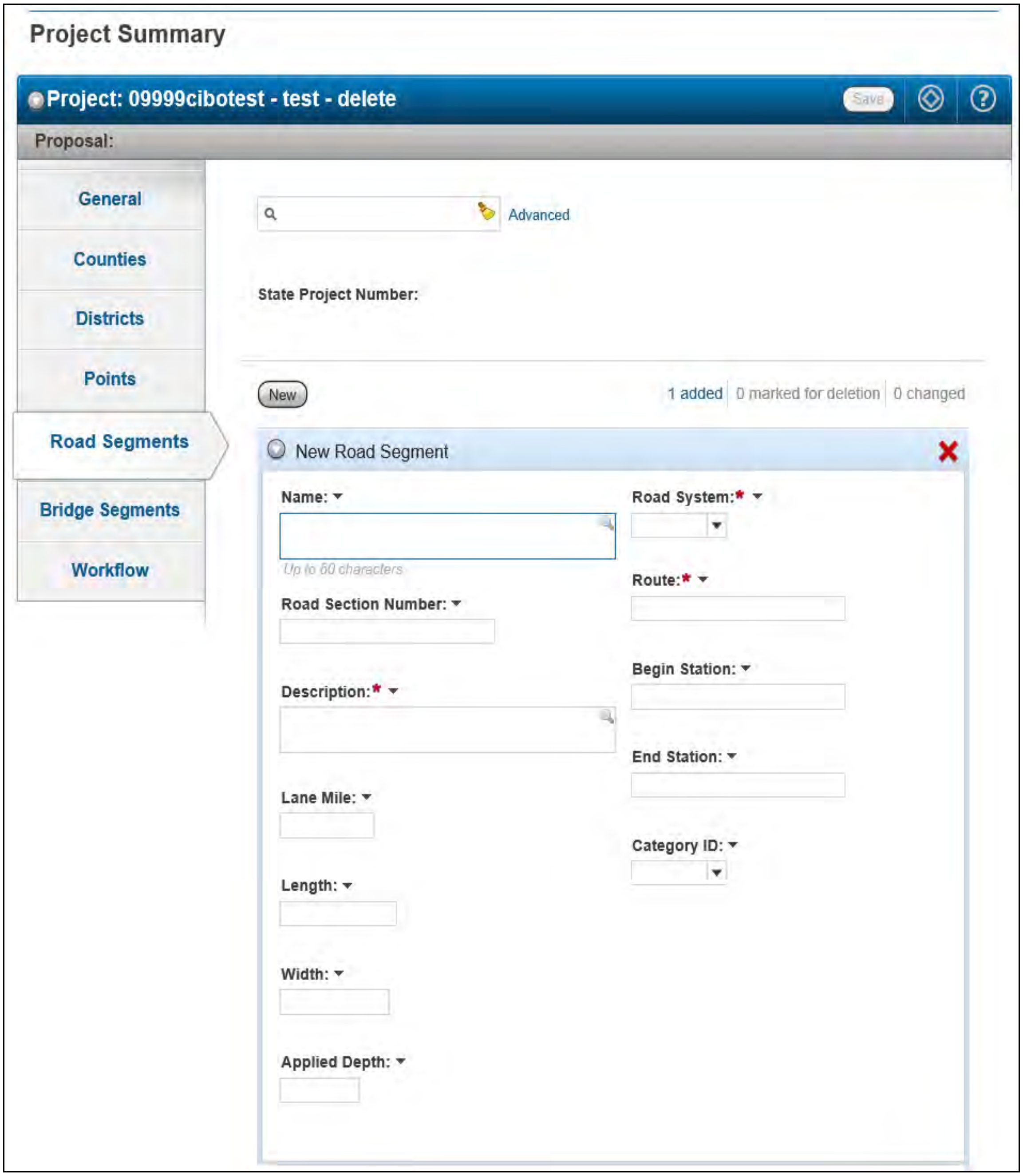


Figure 5 - The Road Segment tab

The fields on the Road Segment tab are:

1) **Name**: The **name of the Road Segment.**
2) **Road Section No.**: Enter the **section number of the Project Number** (the third part of the State Project Number).

   Ex.: Project number is 0615-047-169. Section number is 169.
3) **Description Required**: Enter the **name of the road**.
4) **Lane Mile**: A unit of measure **one standard lane wide and one mile long** (or one kilometer long for metric projects). **Note: The Lane miles should not be separated between Road Segments, the project total Lane Miles should be entered in the *first* road segment of a project.**
5) **Length**: The **length** of the Road Segment in **miles** (or in kilometers for metric projects).
6) **Width**: The **width** of the Road Segment in **feet** (or in meters for metric projects).
7) **Applied Depth**: The **depth of the pavement** in the Road Segment in **inches** (or in centimeters for metric projects).
8) **Road System Required**: The **functional class of the road** (obtained from the title sheet of the plan set or iPM). Select the appropriate code from the drop-down menu.
9) **Route Required**: Enter the **Route Number** exactly as it appears in the State Project Number (4 digits):

   Ex. #1: Project number is 0064-122-101, C501. Route number is 0064.

   Ex. #2: Project number is U000-124-110, B610. Route number is U000.

   Ex. #3: Project number is 0615-047-169, C501. Route number is 0615.
10) **Beginning Station**: Enter the **beginning station of the project** (from iPM or the plan set cover sheet) and the "+" and decimals should be included, otherwise this field can be left blank. (**Ex**.: 1290+10.72)
11) **Ending Station**: Enter the **ending station of the project** (from iPM or the plan set cover sheet) and the "+" and decimals should be included, otherwise this field can be left blank. (**Ex**.: 1360+15.95.)
12) **Category ID**: A unique identifier assigned to each Project Category in the system. **This field is not used.**

2.9 Bridge Segments tab

Click this tab to **add bridge segment information** for the project

A bridge segment can be used to locate a specific section of a bridge as the site for a project's work or a portion of the project's work. It can also refer to an entire bridge.

- The Bridge Segments tab on the Project Summary contains an accordion list of all the bridge segments associated with the project.

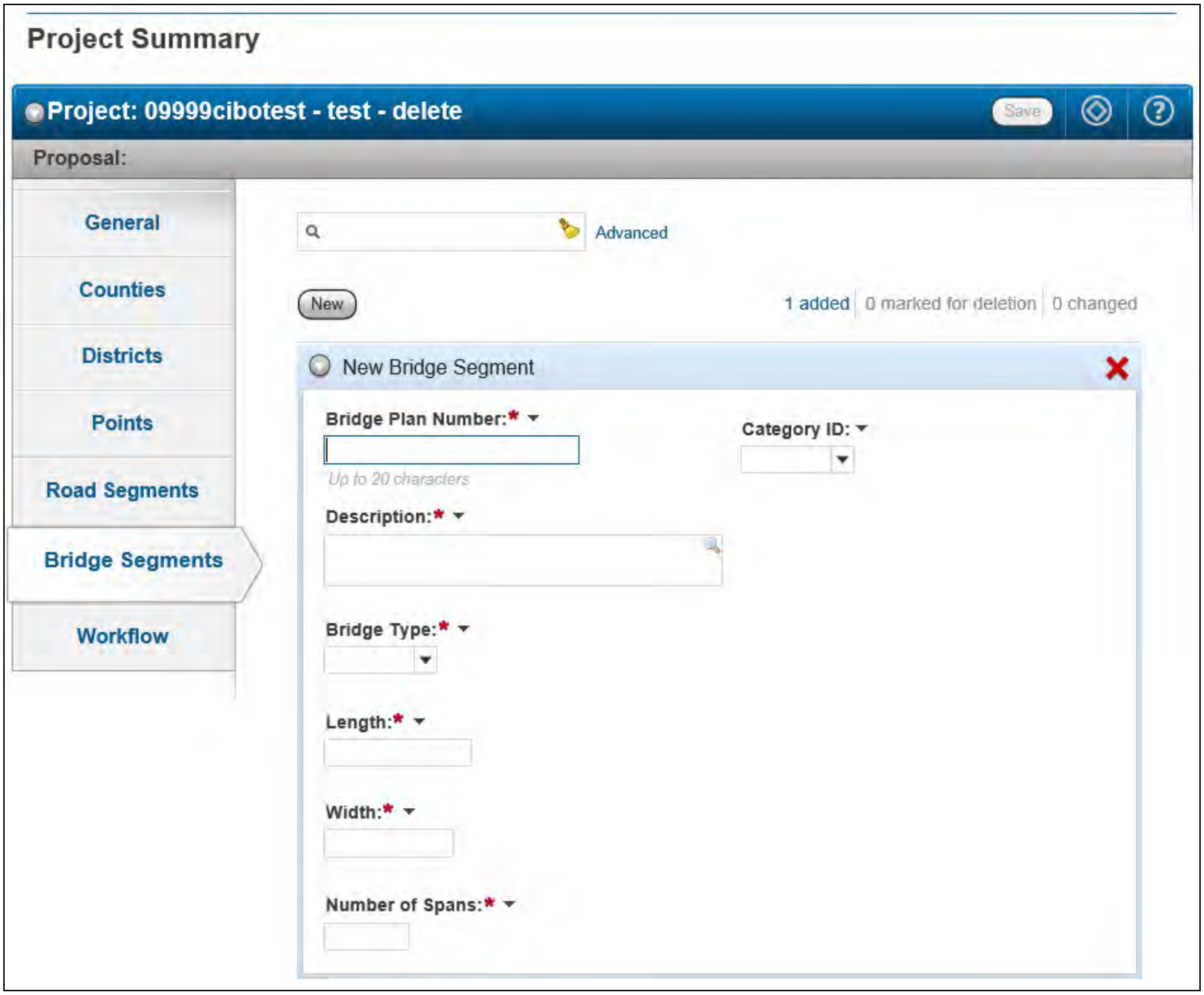


Figure 6 - The Bridge Segment Tab

The fields on the Bridge Segment tab are:

1. **Bridge Plan Number Required**: Enter the number in this field. Ex: 276-73

2. **Description Required**: Enter the **description.**

3. **Bridge Type Required**: Select the appropriate type from the pull-down.

4. **Length Required**: Enter the length in miles or kilometers, to 4 decimal places.

5. **Width Required**: Enter the width in feet or meters, to 4 decimal places.

6. **Number of Spans Required**: Enter the number of spans as a whole number.

7. **Category ID:** A unique identifier assigned to each Project Category in the system. **This field is not used.**

2.10 Project Workflow

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. 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.

In most cases, the workflow assigned to a project or proposal remains the same throughout the preconstruction life cycle, but the phase is updated as work progresses. **Workflow must be set for every project based on the table below:**

1. Click the **Workflow** tab.

2. In the **Workflow** field, click the drop-down arrow and select **VDOT Workflow-Project-Proposal-Contract**.

3. In the **WorkflowPhase** field, click the drop-down arrow and select **Project Definition Phase**.

4. Click the **Save** button.

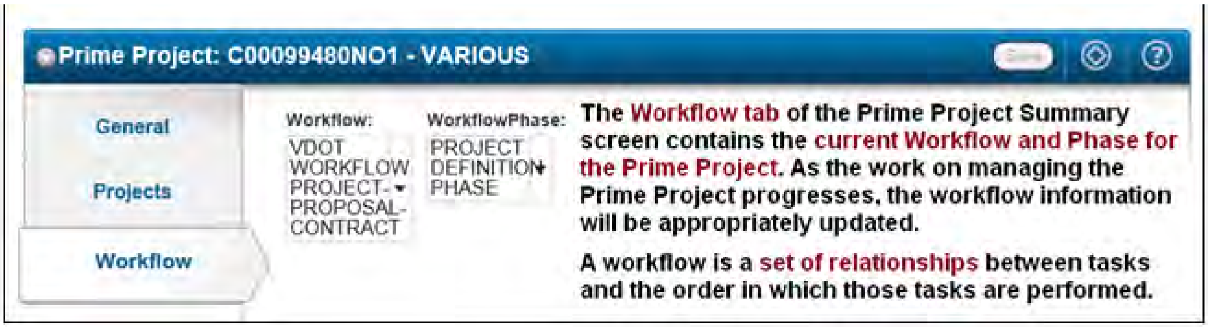


Figure 17 - The Workflow Tab

<u>Workflow Phase Definitions</u>

Project Definition Phase	Engineers / Designers Use
Proposal Definition Phase	Construction Division / Select District Staff / District SAPP Coordinators
Advertisement Phase	Construction Division Use Only
Addenda Phase	Construction Division Use Only
Bid Letting Phase	Construction Division Use Only
Post Bid Evaluation Phase	Construction Division Use Only
Preconstruction has ended Phase	Construction Division Use Only
Moved to Construction/SiteManager	Construction Division Use Only
Historical Phase	Construction Division Use Only

2.11 Retrieving a Project

To open an existing project:

4. Click on **Projects** from the Preconstruction Dashboard located on the Home page**.**
   - This will take you to the **Project Overview screen.**
5. Clear out the Search by **clicking on the broom**, then **enter the Project ID** and hit **Enter.**
6. The **Project Summary row** will come up. Make sure that the Project ID is correct and **click on the Project ID.**
7. The **Project Summary screen opens** with the **correct Project ID** being displayed.

Figure 8 - Selecting and Opening a Project

The **Project Summary screen** opens on the General tab.

2.12 Changing a Project

Once opening a Project the **General tab of the Project Summary screen** displays**.**

- Click on the **specific tab** or **Quick Link** to bring up that screen.
- After making your changes, click the **Save button** located on the screen, window or row. If you do not save your work, your changes will be lost when you leave the screen.

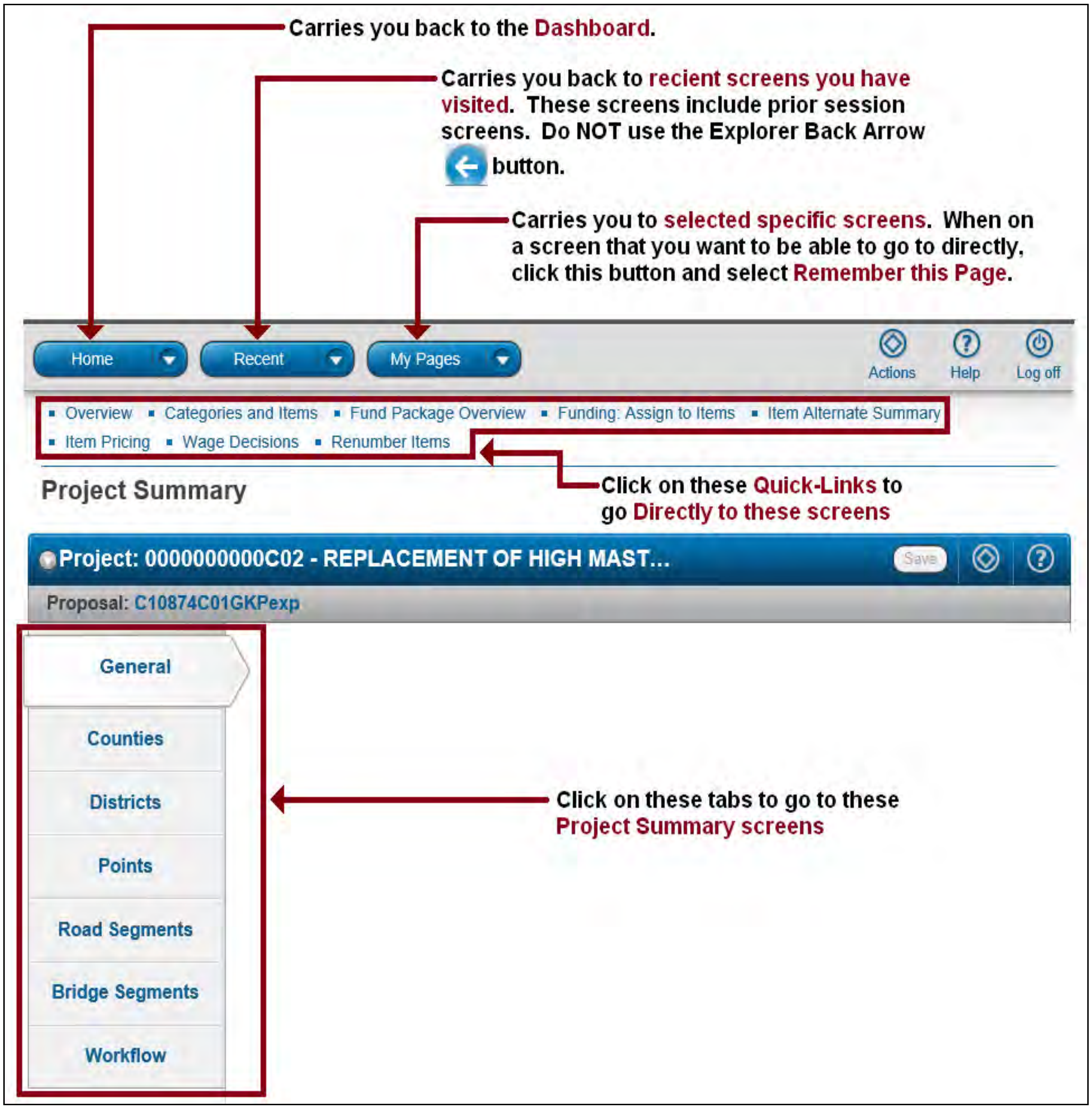


Figure 9 - Bringing Up Specific Tabs and Screens

Note that **changes cannot be made to the Project ID field as it is display-only**. If an error was made for Project ID field, you can copy the project (see **3.14 Copying a Project**) and give the correct Project ID when copying. After the copy is made, the incorrect project can be deleted (see **3.13 Deleting a Project**).

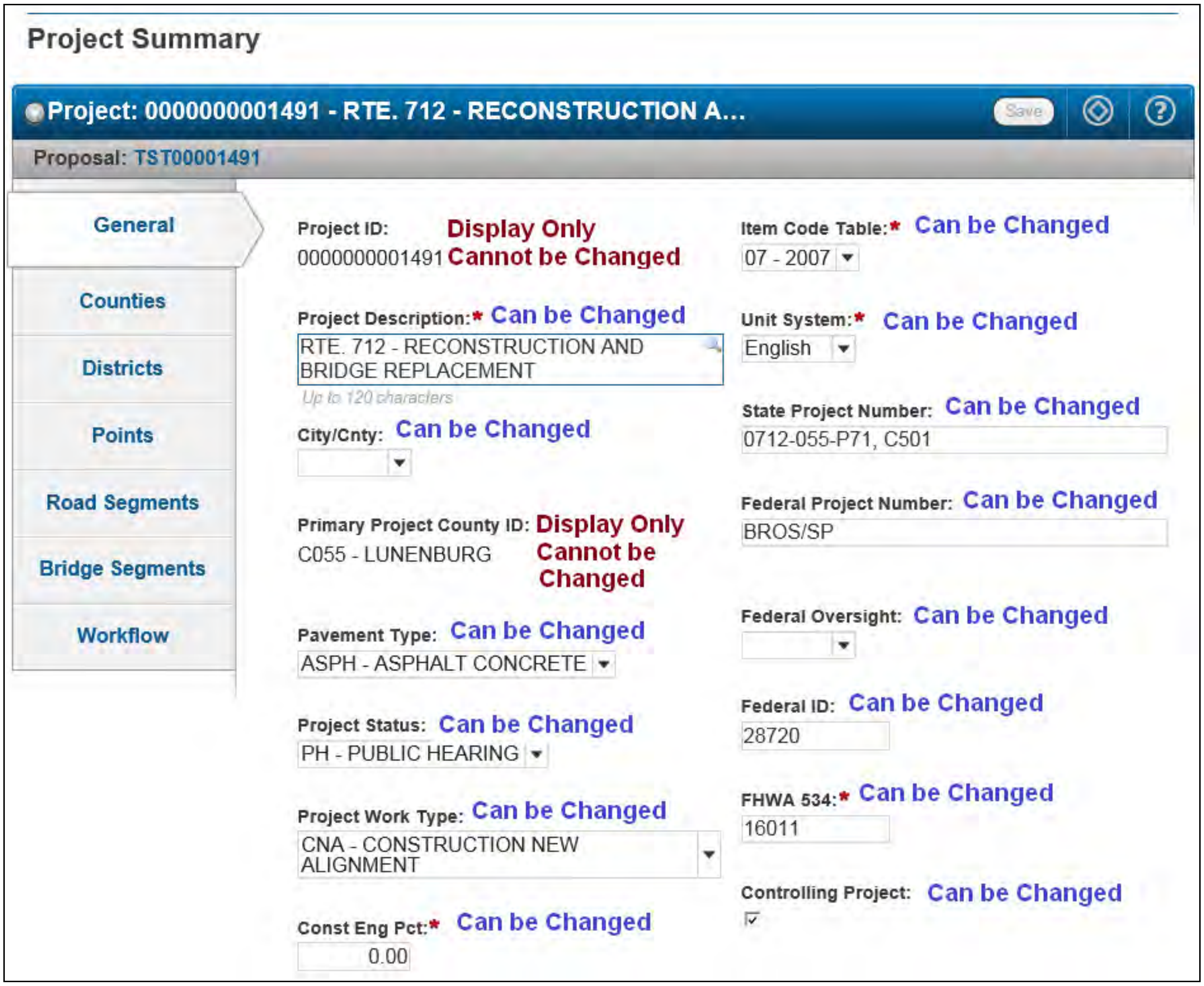


Figure 7 - Changeable and Non-Changeable Fields when Updating a Project

2.13 Delete a Project

Note: Prior to deleting a project, YOU MUST disassociate the project from the Prime and the Proposal if attached. See Prime and Proposal Sections for details.

Bring up the **Project row in the Project Overview screen** and select the row's **Action Menu**.

1. Click **Delete**.
2. The row will turn **grey** and can be **reversed** by clicking the **Undo** **button**.
3. Click the **Save button** to complete the delete of the Project.

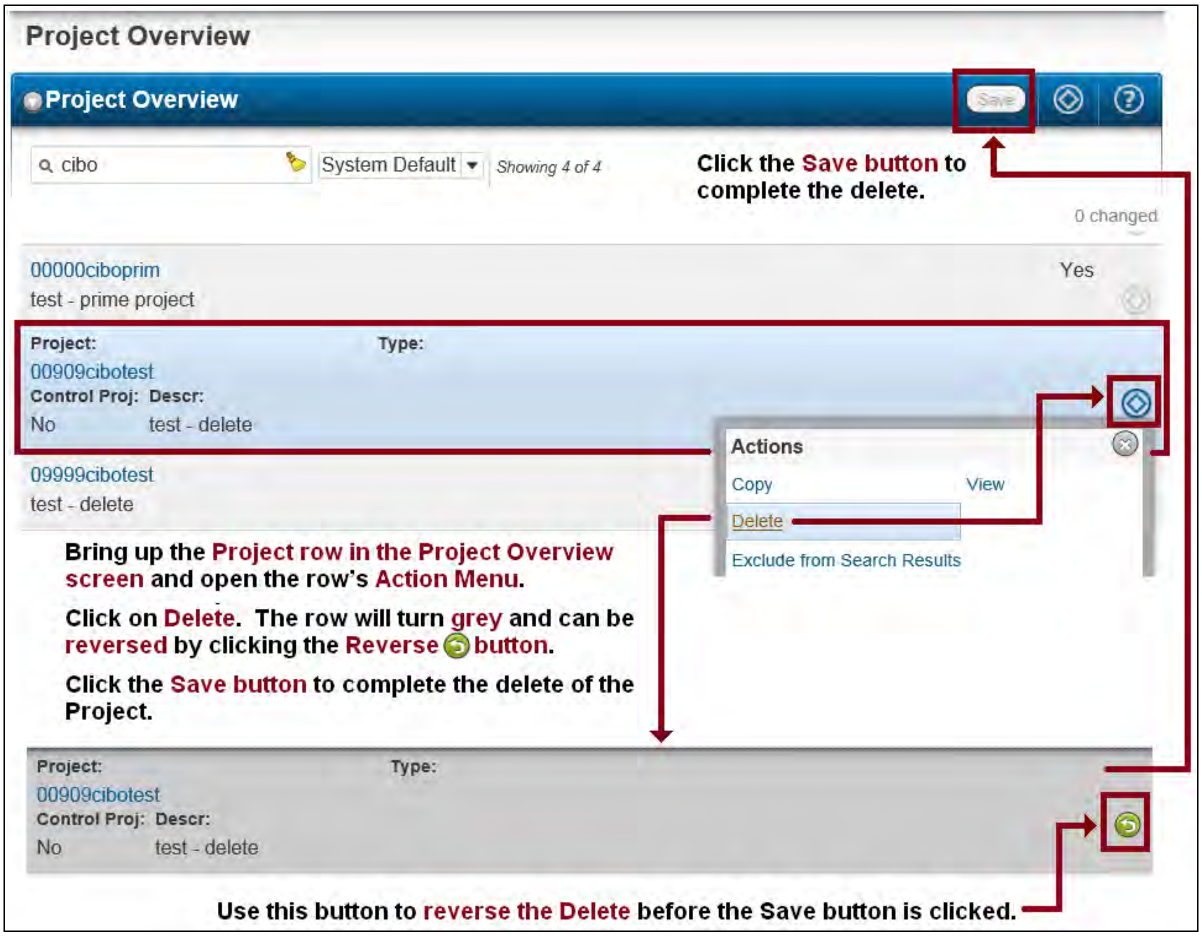


Figure 8 - Deleting a project

After the Delete has completed, the Project Row will disappear from the Project Overview's list of projects.

2.14 Copying a Project

To copy a project from the Project Overview screen:

1. **Click on the Project's row Action Menu button** to open up the **Action Menu** and **click on Copy.**
2. When you **click on Copy**, it will bring up the **Copy Project screen displaying the old Project to be copied.**
3. Enter a **new and unique Project ID**.
4. Click the **Copy button** on the Copy Project header to complete the copy.
5. The Project will **copy without errors or warnings.** When completed, the Copy will return the user to the copied Project's **Project Summary General** tab which displays the new Project ID.

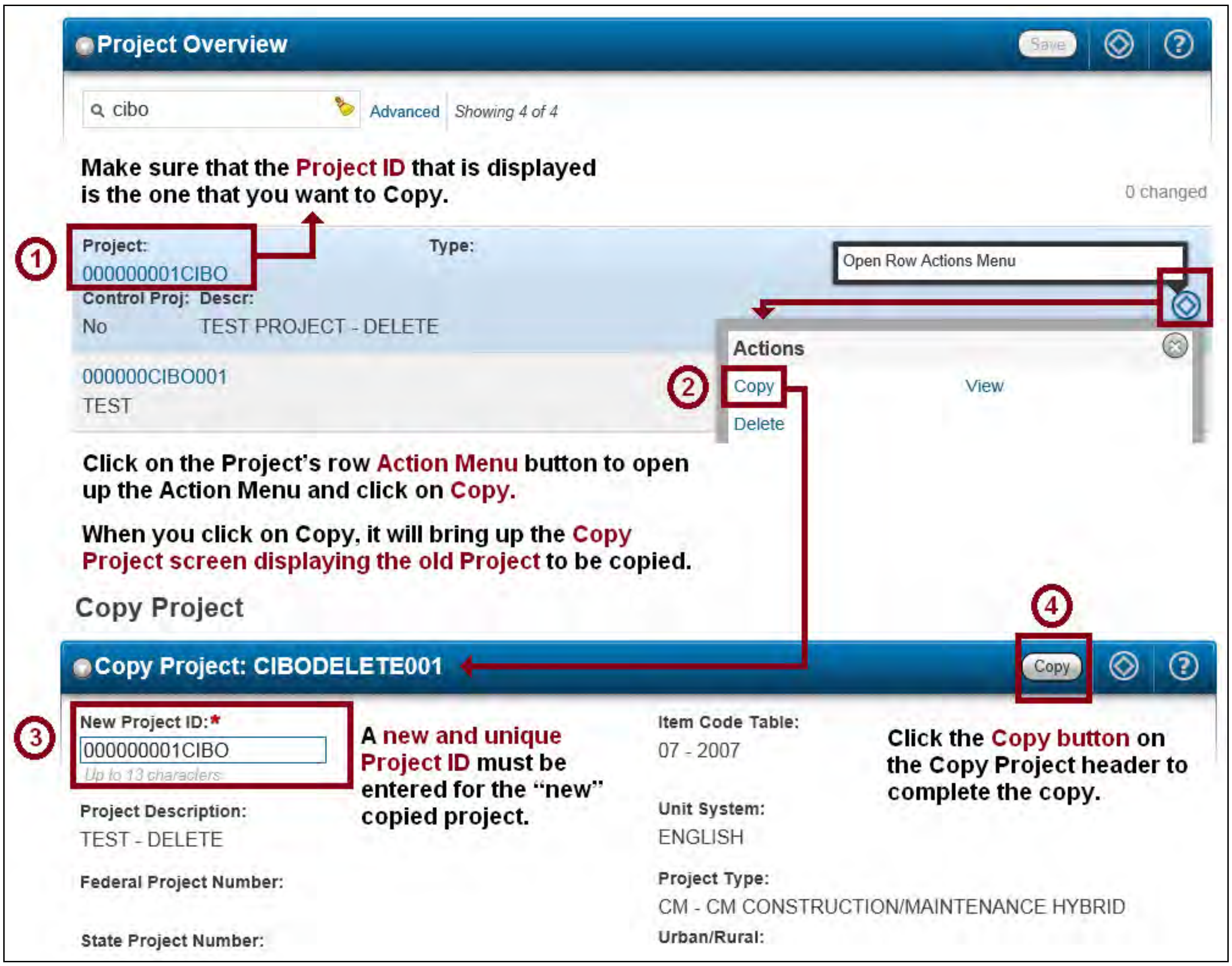


Figure 9 - Copying a Project from the Project Overview Screen

2.14.1 Copy a Project (Alternate Method)

As an alternative, the copy can be performed from the **Project Summary's General Tab for the selected project to be copied.**

- Open up the header's **Action Menu** and select **Copy**.
- When you **click on Copy**, it will bring up the **Copy Project screen displaying the old Project to be copied.**

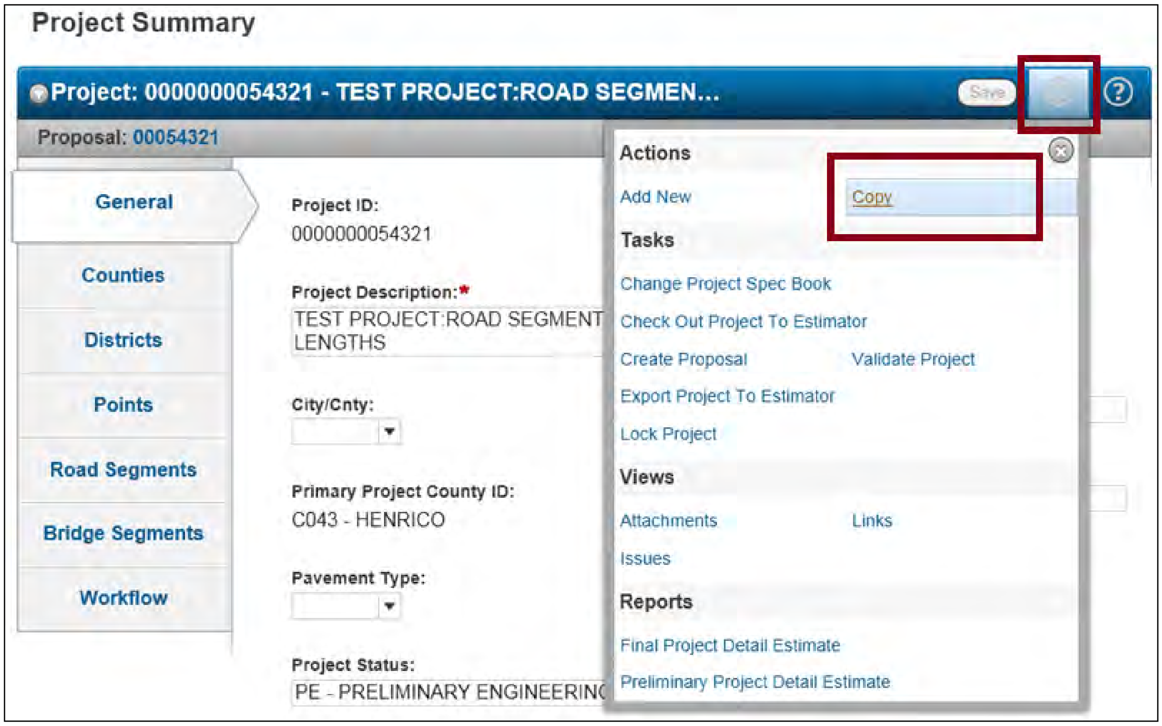


Figure 10 - Copying a Project from the Project Summary Screen

When you **click on Copy**, it will bring up the **Copy Project screen displaying the old Project to be copied.**

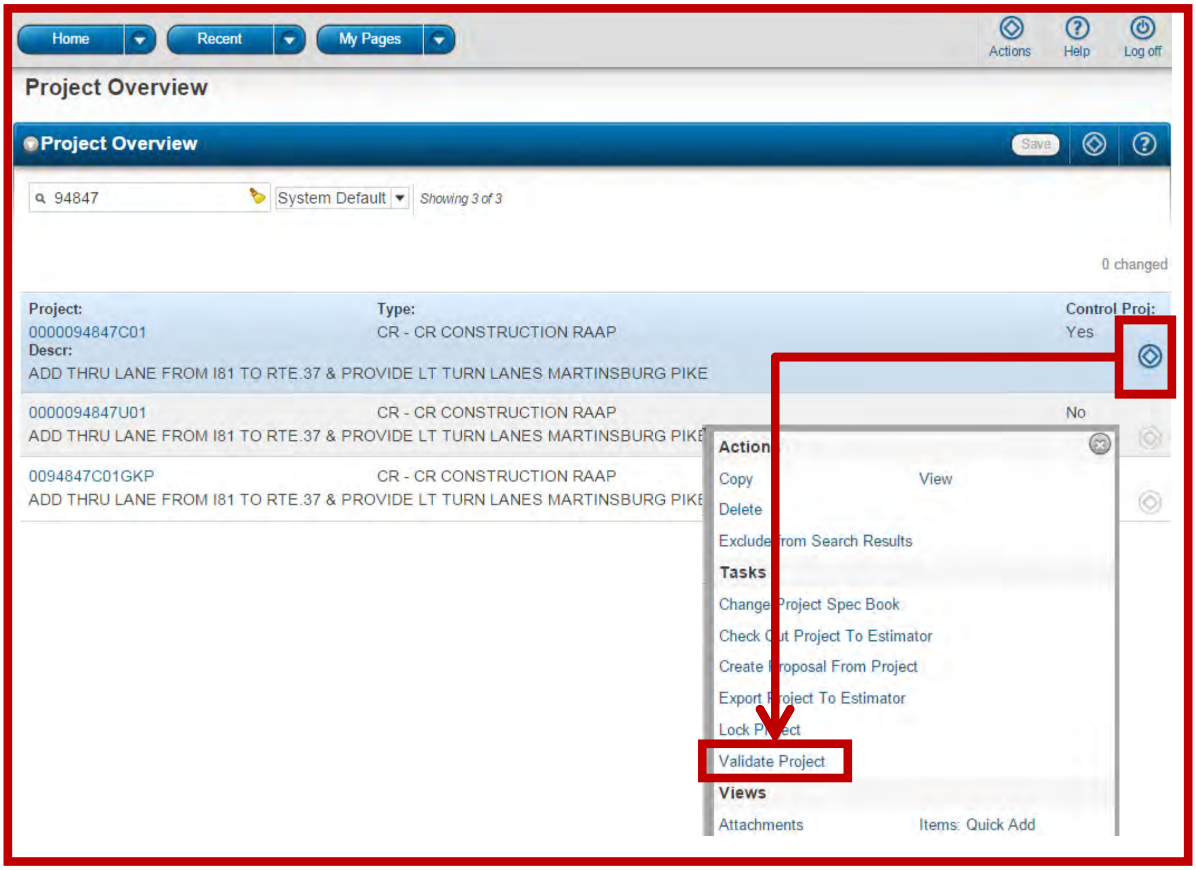
2.15 Validating a Project

All projects/estimates should be validated to check for errors. The validation process generates a list of warnings about the state of the project and does not stop further processing. Validation can be performed at any time in the estimate life-cycle but should be run before the user runs detail reports. Validation can be run the Project Overview screen or from within an open project.

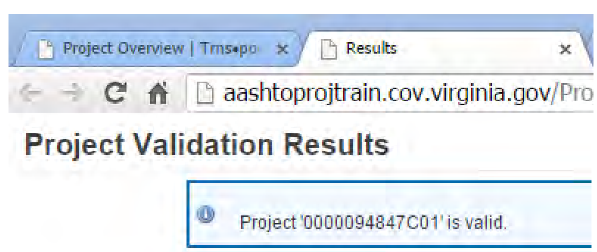
2.15.1 Validating a project from the Project Overview

To validate a project without opening it, perform the following steps:

1. Navigate to Project Overview screen
2. Enter the UPC in the search box.
3. Select the Row action button for that project
4. Select **Validate Project.**



5. A new browser window/tab opens and provides results of validation, error messages will appear here using the color coding described in Chapter 1.
6. If errors occur, close the validation browser tab, make the necessary corrections and then re-run the Validation so that your project is free of errors.



2.15.2 Validating from an Open Project

Validation within an open project is available in two locations: Project Summary or Project Category and Item Summary screens.

To validate from an open project, perform the following steps:

1. Navigate to the Project Overview screen.
2. Enter the UPC in the search box.
3. Open the desired project.
4. Select the Row action button from either the Project Summary or Project Category and Item Summary screens.
5. Select **Validate.**
6. A new browser window/tab opens and provides results of validation, error messages will appear here using the color coding described in Chapter 1.
7. If errors occur, close the validation browser tab, make the necessary corrections and then re-run the Validation so that your project is free of errors.

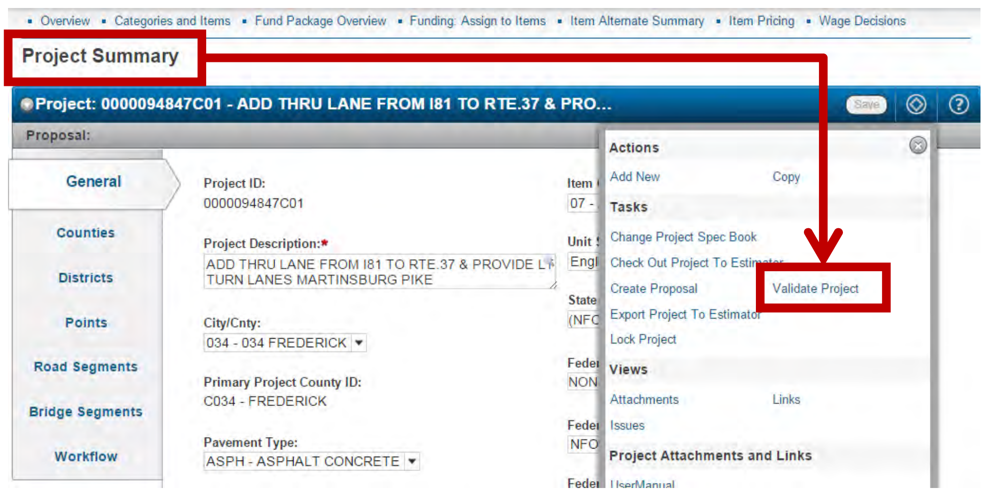


Figure 14 – Validate from Project Summary

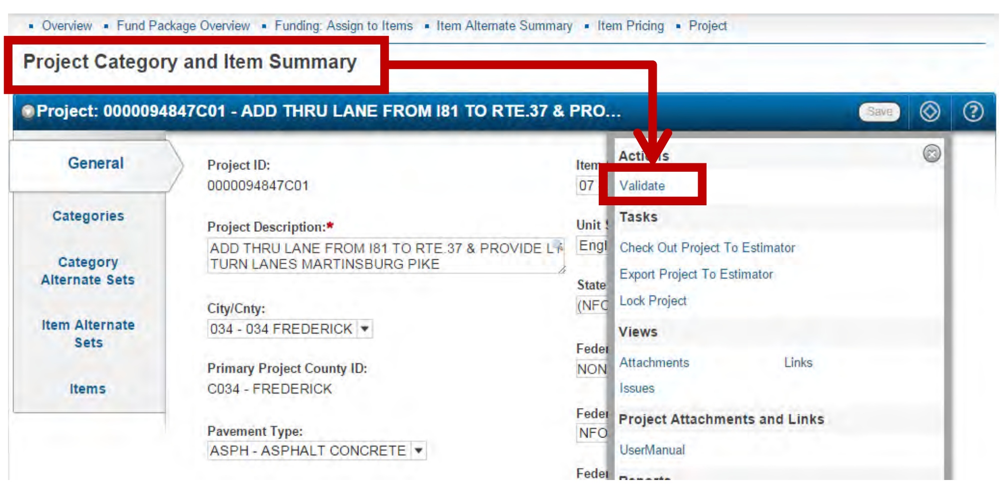


Figure 15 – Validate from Project Summary

2.15.3 Validation Error Checking Overview

<u>The Validation process checks the following:</u>

- The project contains at least one project item.
- The project contains at least one county.
- The sum of the project county percentages equals 100%.
- The project contains at least one district.
- The project contains at least one category.
- All project items must be assigned to a category.
- All project items must have a quantity.
  - blank, null are not valid, 0 is a warning
- All project items must have a price.
  - blank, null are not valid, 0 is a warning
  - If the **Bid Requirement Code** field is set to *Minimum* for an item, the project item price must be greater than or equal to the value in the **Unit Price Comparison** field.
  - If the **Bid Requirement Code** field is set to *Maximum* for an item, the project item price must be less than or equal to the value in the **Unit Price Comparison** field.
- The project contains a point location record with the word "midpoint" recorded in the **Description** field and recorded values for **longitude** and **latitude**.
- All project items have been funded.
  - All fund packages associated with an item must pass funding validations.
- The proposal has a primary county.
- The proposal has at least one associated project.
- A proposal time record is identified as Main Time.
- Proposal items exist for the proposal.
- All proposal items have a quantity.
  - blank, null are not valid; 0 is a warning.
- All proposal items have a price.
  - blank, null are not valid; 0 is a warning.
  - Unit prices do not fall outside the boundaries of the minimum or maximum value held in the **Unit Price Comparison** field whenever multiple projects containing items with minimum or maximum bid requirements but with different Unit Price Comparison values are added to the same proposal.
- Proposal items identified as fractional lump sums have the same estimated price and quantities that sum to 1.0.
- All proposal items are assigned to a section (needed for Expedite).

3. MAINTENANCE-FUNDED PROJECTS

For simplicity in this chapter, this type of project will be referred to as a maintenance-funded project.

This chapter covers adding, changing and deleting maintenance-funded projects. A special chapter is required for this since much information input for maintenance-funded projects differs from construction projects.

There are **two basic types of maintenance-funded projects:**

- **Schedule Work** (at multiple locations with like assets)
- **Maintenance-funded Project at a single location** (i.e., Bridge Repair)

3.1 Adding a Project

The Add Project component opens on the **General** tab, which allows you to add basic information for the new project.

- Click on **Projects** from the Preconstruction Dashboard located on the Home page**.**
- **Click the Project Overview Action button** and **click Add.**

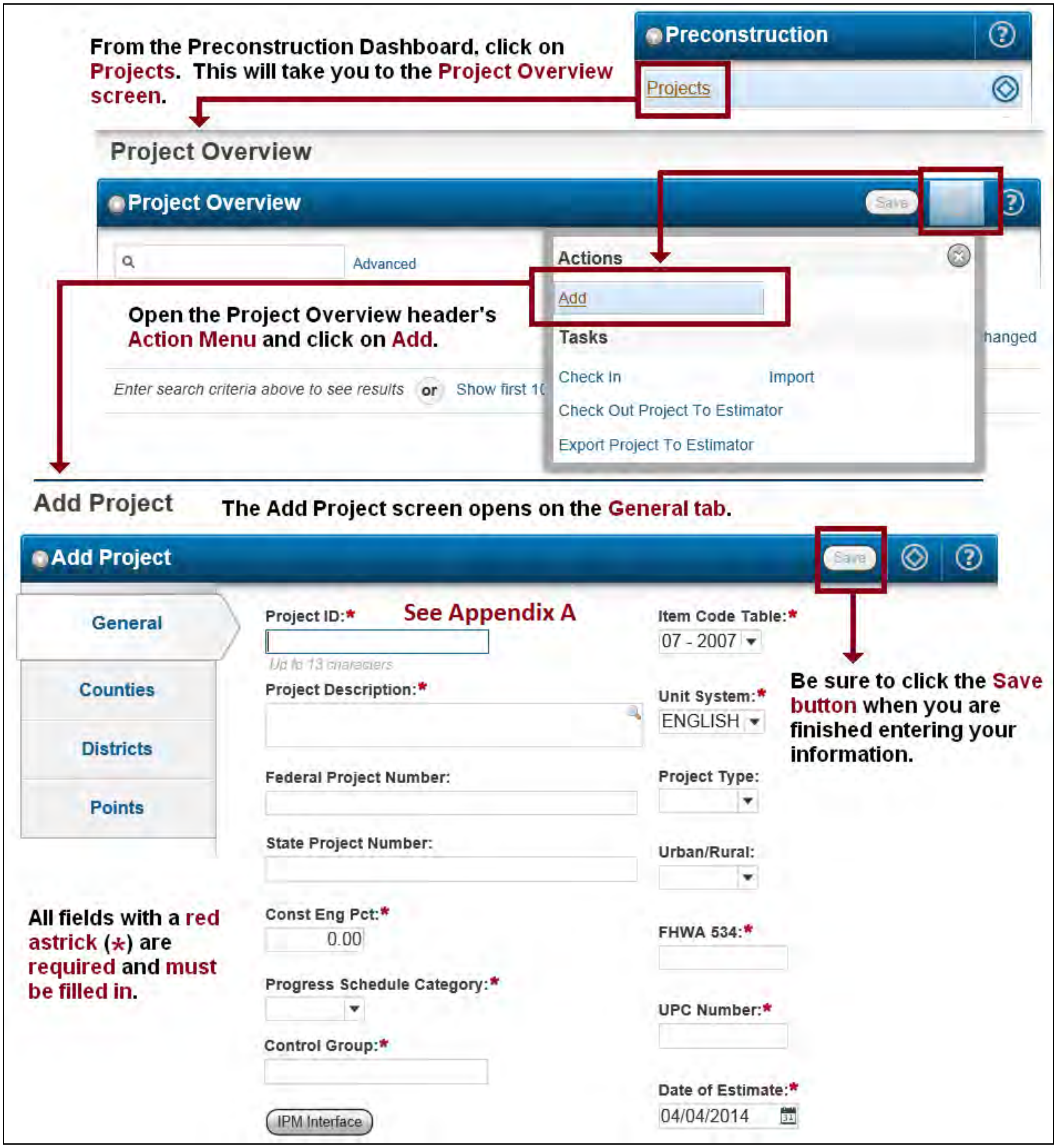


Figure 1 - Adding a Project from the Project Overview screen

The Add project screen requires entry of only the minimum required fields for the database to determine if the Project ID is unique, once the new project is saved then the user will complete the remaining fields.
Please note that users are encouraged to use all UPPER CASE for ALL fields in Web Trnsport

The following fields are required (indicated by a **red asterisk** *) when adding a new Project:

1. Project ID (See Appendix A for complete rules and instructions)
2. Project Description
3. Progress Schedule Category (See Appendix H)
4. Control Group
5. Item Code Table
6. Unit System
7. FHWA 534
8. UPC Number (must be 8 digits)
9. Date of Estimate

The **Add Project screen will display four tabs**: General, Counties, Districts and Points.

- The remaining Project Summary tabs – Road Segment, Bridge Segment and Workflow will not appear until you have saved the Add Project screen and go to the Project Overview screen and retrieve the newly added Project.
- To save the newly added project, click the **Save** Save **button** found on the right side of the Add Project header.

Saving the Project and Correcting Errors

When all tabs of the Add Project screen have been completed or when you are ready to save your data, click the **Save** 

button to insure that all information entered has been saved.

- If you have completed all required field criteria satisfactorily and the Project ID (PCN) is a unique number, the project will be added/saved.
- The Project ID field can be changed as long as you are on the Add Project screen, even if the project was previously saved on that screen.
- Once you navigate away from the Add project screen, then you can only return to that project by way of the Project Summary screen. **The Project ID field will convert to display-only and cannot be changed.** This ensures unique Project ID's in the database.
- If a required field was not filled-in or incorrect data entered at a field which is supported with a reference table, an **Error** box will display. For example, if you left a required field blank or entered invalid data, you will see an **Error** box at the top giving information as to what field was left blank or contains an invalid value.
- If you attempted to create a project with a Project ID already in existence in the Trns·port database, you will see an **Error** box with the message that the Project ID (the primary key) is already being used by another project. A project could already exist in another control group with the Project ID you have just attempted to create. Trns·port will not allow duplicate Project IDs.

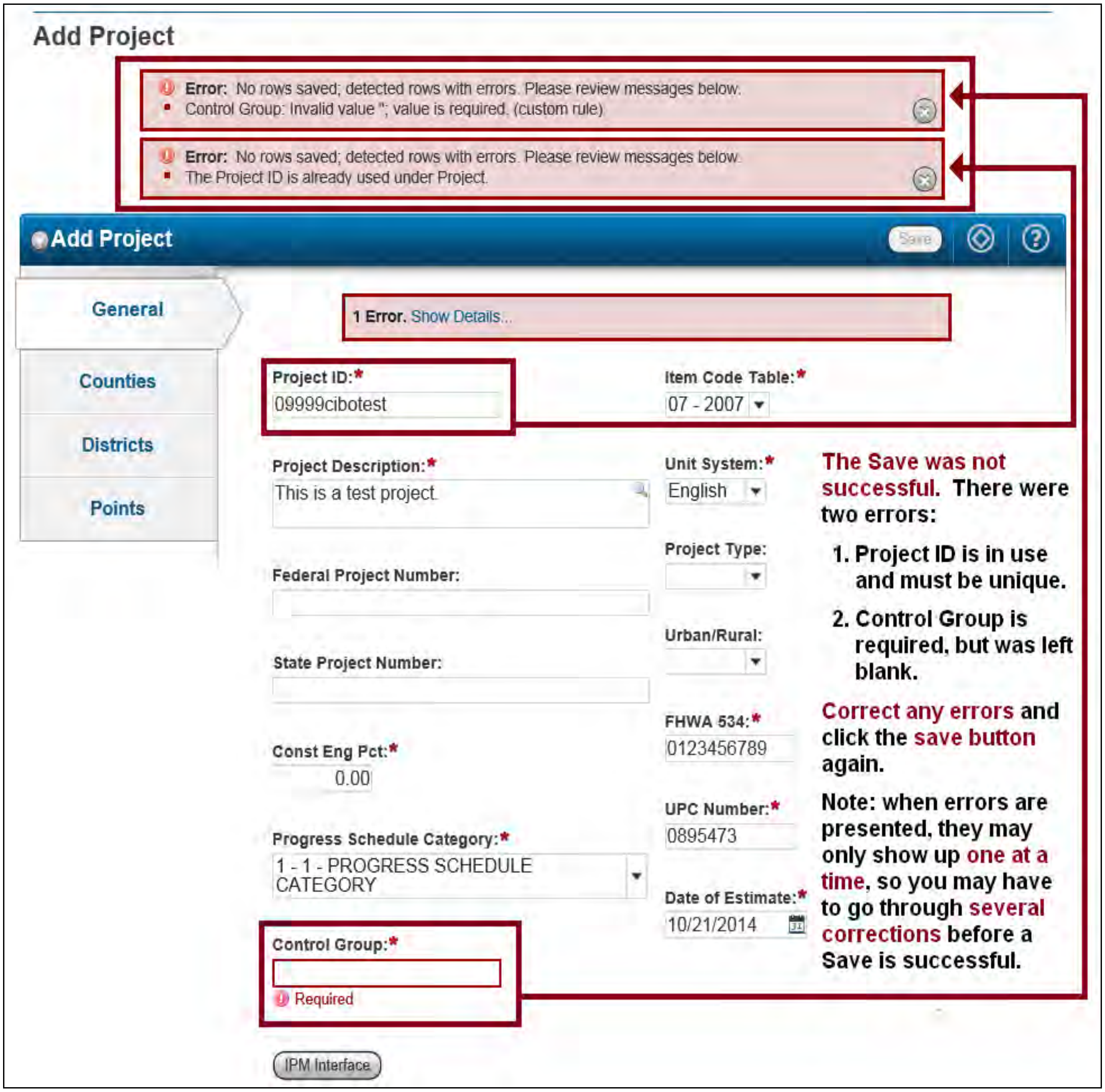


Figure 2 - Required Field, and Incorrect or Missing Data Errors

Note: when any errors are presented, they may **only show up one at a time**, so you may have to go through **several corrections** before a save is successful.

Errors must be corrected before the project record will be accepted into the database.

3.2 Schedule Work (at multiple locations with like assets)

An example of schedule work is Plant Mix or Bridge Joint Repairs being done in 8 different counties, and involving all three types of road systems (interstate, primary, secondary).

In Trns·port, this work needs to be broken down into separate projects BY COUNTY, BY SYSTEM. For the above-mentioned example, 24 projects would need to be created.

> **TIP**: If the projects will be basically the same (same funding, same pay items, etc.), take advantage of the Copying a Project option. Prepare one project in its entirety, composing the category, attaching the funding and the items, and THEN copy the project. Once the project is copied, minor modifications may be made to the copy(ies). See **4.8 Copying a Project** for instructions to copy a project.

3.2.1 Complete Remaining Fields

Return to Project Overview and Retrieve the New Added Project

Once you have saved your Project and the required fields on the General, Counties, Districts and Points tabs, **click the Overview link**, enter the new project's UPC Number and complete the remaining fields by entering the **Road Segment** tab, **Bridge Segment** tab and **Workflow** tab information.

Figure 3 - Retrieving a Project from the Project Overview Screen

To complete the Project:

1. Click on the **Overview quick link** at the top left of the Add Project screen or click on the **Home button** and then click on **Projects** from the Preconstruction Dashboard located on the Home page**.**
   - This will take you to the **Project Overview screen.**
2. Clear out the Search by **clicking on the broom**, and then **enter the UPC Number.**
3. The **Project Summary row** will come up. **Click on the Project ID to open your Project.**

The **Project Summary screen** is now open on the General tab.

3.2.2 General tab

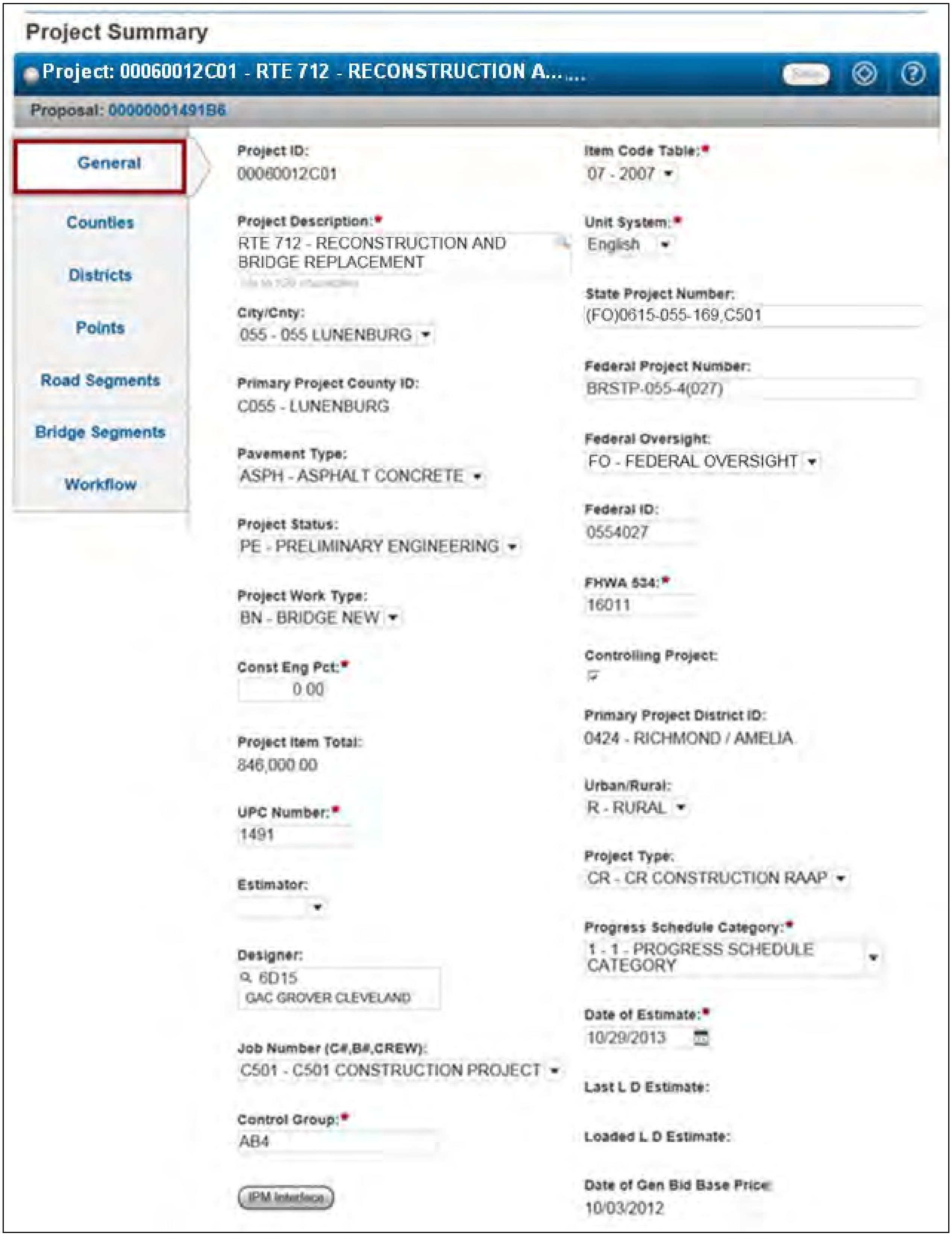


Figure 4 - The General Tab Fields

Use the **[TAB] key** to move between fields and enter the project information on the General tab.

Some fields have **Reference Tables.** As you [TAB] to such a field, a drop-down arrow will appear. A selection MUST be made from the available choices in the table.

FIELD DESCRIPTIONS:

Project ID (PCN) Required: required - The Project ID and Control Number (PCN) may consist of as many as 12 characters (13 characters are required for maintenance-funded (Maintenance Division) projects). Refer to **Appendix A** for Project ID instructions.
(Once the project is completed and added to the database, this field becomes display-only and cannot be changed.)
Examples: M514SSB104463

Project Description Required: For all projects (other than bridge), enter the description of the type of work being performed on this project. For Bridge projects, enter the description from the front sheet title block of the plan set.

City/Cnty: Select County or City in which the project is located from the drop-down menu which should match the State Project Number. Appendix C & D includes County & City codes and appropriate conversions when required.
Ex.: Project number is 0615-047-169. County/City Code is 047.

Pavement Type: Select the appropriate code from the drop-down menu.

Pavement Type Code	
Code	**Description**
ASPH	Asphalt Concrete
BITC	Bituminous Concrete
BITP	Bituminous Penetration
COMB	Combination Asphalt & Concrete
GRDE	Grade & Drained Earth
GRVL	Gravel or Stone
MIXB	Mixed Bituminous
OTHR	All Others
POCC	Portland Cement Concrete
PRIM	Primitive
UNIM	Unimproved

Project Status: Status of the project. Select the appropriate code from the drop-down menu.

Status Table	
CE	Conceptual Estimate
CON1	Construction (1st Submission)
CON2	Construction (2nd Submission)
FI	Field Inspection
LAS	Passes to LAS
PE	Preliminary Engineering
PFR	Preliminary Field Review
PH	Public Hearing
RWS	Right of Way Stage
SR1	Secondary Roads Project Initiative
SYP	Six Year Plan

Project Work Type: Select the appropriate code from the drop-down menu (Maintenance Surface Treatment, Maintenance Signals, Maintenance Asphalt Resurfacing, etc.). Maintenance work types are MAR, MSS, or MST. See Appendix E

Const. Eng. Pct. Required: Refer to Chapter 5.3 for complete details.

Project Item Totals: This field populates automatically.

UPC Num Required: Enter the UPC number of the project, **you must add leading zeros to the UPC number to total 8 digits in this field**. This field populates through the Prime to iPM. Note that this field must match in all Projects under a Prime.

Estimator: This field designates the individual performing the independent Evaluative Estimate. Select the appropriate code from the drop-down menu.

Designer: This field designates the individual entering this estimate in Web Trnsport. Select the appropriate code from the drop-down menu.
Note: All VDOT users should have their name in the list. If your name is not in the list please contact TRNSPORTSupport@vdot.virginia.gov. Consultants may find their firm name in the list.

Job Number: Enter or select **900 Maintenance Schedule Crew** from the pull-down.

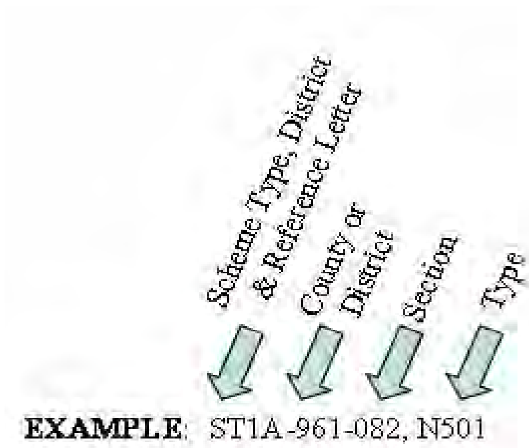
Control Group Required: The control group is the security designation which decides which user has access to which project(s). This field populates automatically with your control group. The data in this field may be changed in order to transfer the project to another control group.

IPM Interface button: Refer to section 2.4.1 for complete details. Please note this feature only functions for VDOT employees.

Item Code Table Required: Select from the drop-down menu. This coincides with the current green Road and Bridge Specifications manual.
07 = English projects or 08 = Metric projects.

Unit System Required: Defaults to E (English Project). Enter M for a Metric Project.

State Project No.: Enter the schedule number as generated by iPM Project Pool
DO NOT ENTER THE PCN IN THIS FIELD.



Federal Project No. Required: Enter the Federal Project Number, if applicable, in its entirety, complete with dashes, parentheses, etc. If the project is not federally-funded, enter NONE. **Ex.:** NH-5401(876)

Federal Oversight: Select the appropriate code from the drop-down menu. Reminder: The (NFO) or (FO) designation should be included in the State project # field.
NFO = No Federal Oversight
FO = Federal Oversight
N/A = State Project

Federal ID: Enter only the **numbers** of the Federal Project Number, with no punctuation, no alpha characters, and seven digits maximum. Even though the field accepts characters, only the Federal Project Numbers or the word "NONE" should be entered in this field.

EXAMPLE: Fed. Project No. is STP-5A03(264)
Enter, in this field, **503264**

If the project **does not have a Federal Project Number**, enter **NONE**.

FHWA 534 Required: Enter the five alpha-numeric characters which follow "FHWA 534 DATA " (This code can also be found in the Project Pool of iPM, under the general tab)

Controlling Project Checkbox: Should be checked for the project containing the most money. See Chapter 8 of this manual for details

Primary Project District ID: This field populates automatically.

Urban/Rural Class: Select the appropriate code from the drop-down menu: U, R or S.

Project Type: Select the appropriate code from the drop-down menu.

Project Type Code	Use	When
CR	when adding capacity	Regular advertisement
CS	when adding capacity	SAAP advertisement
CMMR	when maintenance only (not adding capacity)	Regular advertisement
CMMS	when maintenance only (not adding capacity)	SAAP advertisement
CMSR	when maintenance schedule only	regular advertisement
CMSS	when maintenance schedule only	SAAP advertisement
These types must have unique UPC's that are opened to phase 9104 and x31 activities		

Progress Schedule Category Required: Select the appropriate Progress Schedule from the drop-down menu.

For description of codes or references, See **Appendix H** or open this link:

http://www.virginiadot.org/business/resources/const/projectcategories.pdf

Date of Estimate Required: When you first add the Project, this field will be automatically populated with the **current date**.

- Each time the project is **revised and saved**; this date should be changed to reflect the revision.
- To change the date, click the **Calendar** **Icon** and select the new date.

Last L&D Estimate: This field populates automatically.

Loaded L&D Estimate: This field populates automatically.

Date of Gen Bid Base Prices: This field **no longer populates automatically**, users should fill in this field every time they price Items and/or Category Items

3.2.3 Counties, Districts and Points tabs - Associating these to a Project

Counties tab

Each project must have one, and only one, county associated to it and its Percentage must equal 100%. Failure to associate a county will prevent the generation of the preliminary detail estimate report.

- Click on the **Counties tab** to bring up County information.

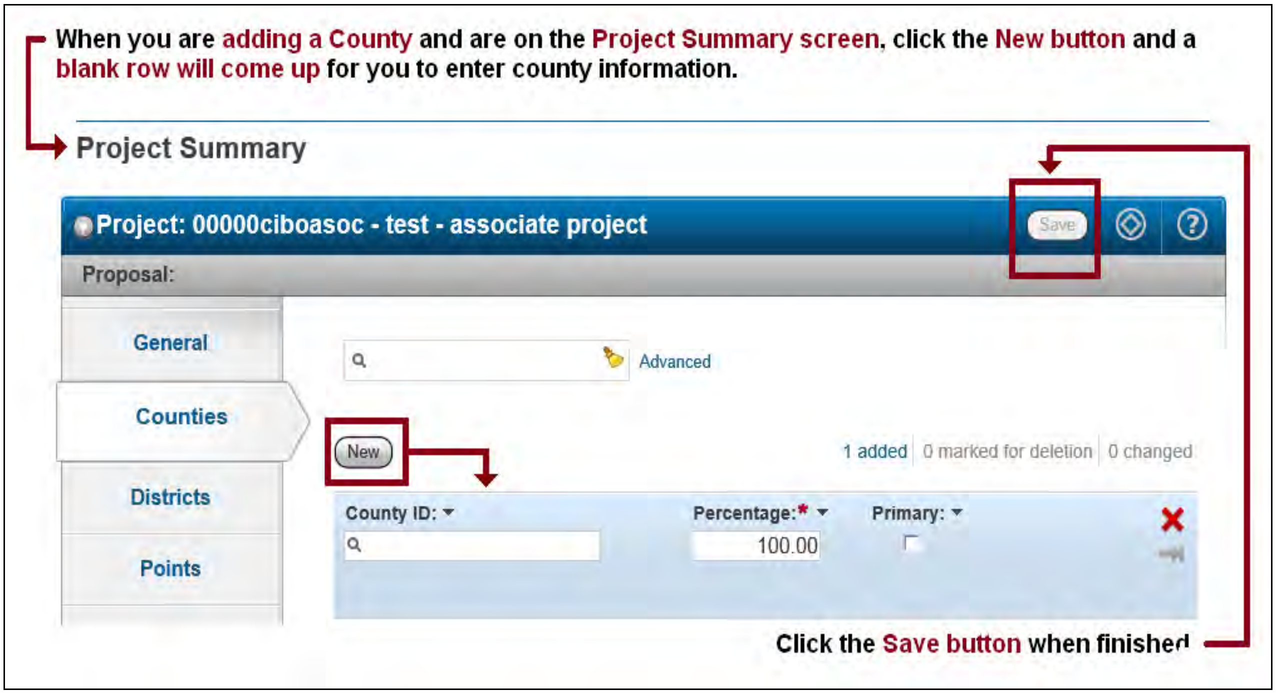


Figure 52 - The Counties tab

To add a County:

1. When the **Counties tab** is displayed, if it is not showing a blank row, click the **New button** and enter the following information:
2. **County ID: t**his is a search field. Enter the **county number or name** and then select the appropriate code from the drop-down menu. See **Appendix D** for a complete listing.
3. **Percentage:** this is a **required field** and will **default to 100.**
   - This is the percentage of the Project that is associated with this County.
4. **Primary: Checkbox –** This should always be checked.
   - **One county must be flagged as the Primary County**, which is the **controlling county.** Since the County Percentage must be 100%, this county must be flagged as Primary.
5. When the county information has been entered, click the **Save button**.

3.2.3.1 Deleting a County from a Project

To **remove** a **County** from a Project, select the Counties tab and select the County row's Action Menu and select **Delete.** After the row turns grey, click on **Save** to complete the delete.

To **change a County to a different County**, go to the Counties tab and select the County ID field and change to the new **County ID,** and then select **Save**.

3.2.4 District Tab

Click on the **Districts tab** to bring up the Districts associated with the project.

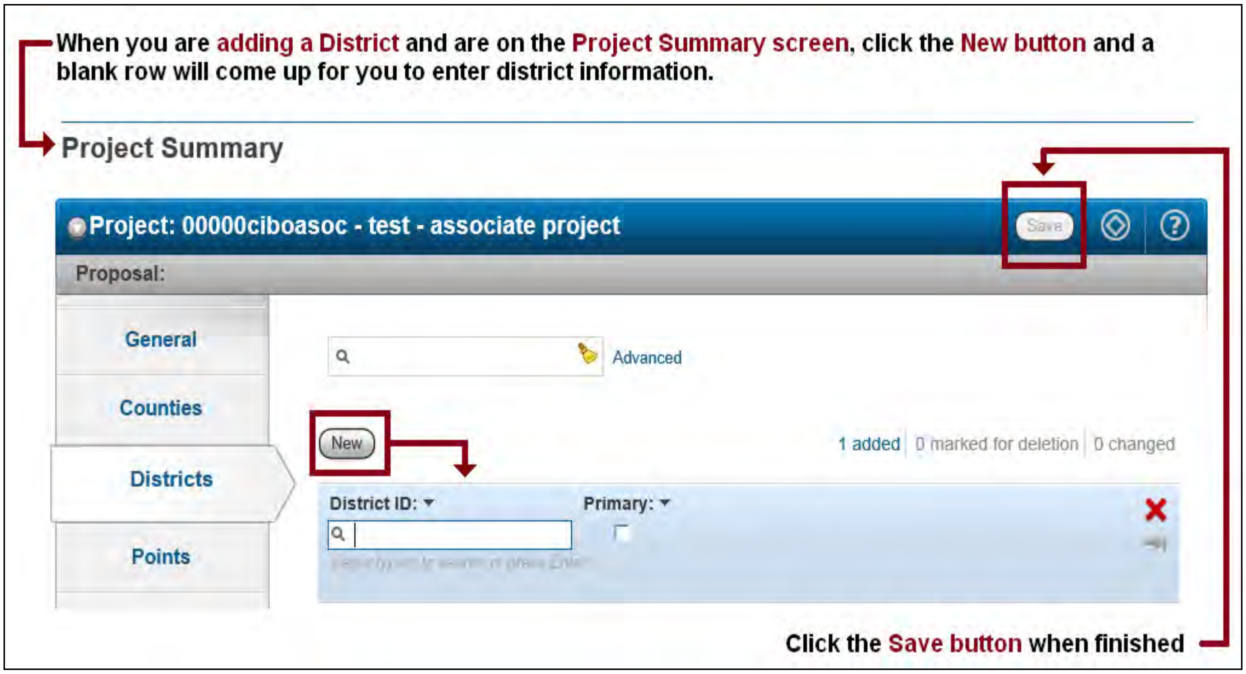


Figure 6 - The Districts tab

To add a District:

1. When the District tab displays, if it is not showing a blank row, click the **New button** and enter the following information:

2. **District ID:** This is a search field**.** Hit the **Enter key** or enter all or part of the District number or name and select the appropriate **District** from the drop-down list.

District	District No.
Bristol	1
Salem	2
Lynchburg	3
Richmond	4
Hampton Roads	5
Fredericksburg	6
Culpeper	7
Staunton	8
Northern VA	9

3. **Supplemental Description**: This field should be **left blank.**

4. **Primary: Checkbox –** This checkbox indicates that the District is the **first or principal district** in which work will be performed for this project.

   - If there are **multiple Districts**, then **one District must be flagged as the Primary District.**

3.2.5 Points Tab

Click on the **Points tab** to bring up the location associated with the Project.

- All fields on the Points tab are **required** when you access this tab, enter data and save it.

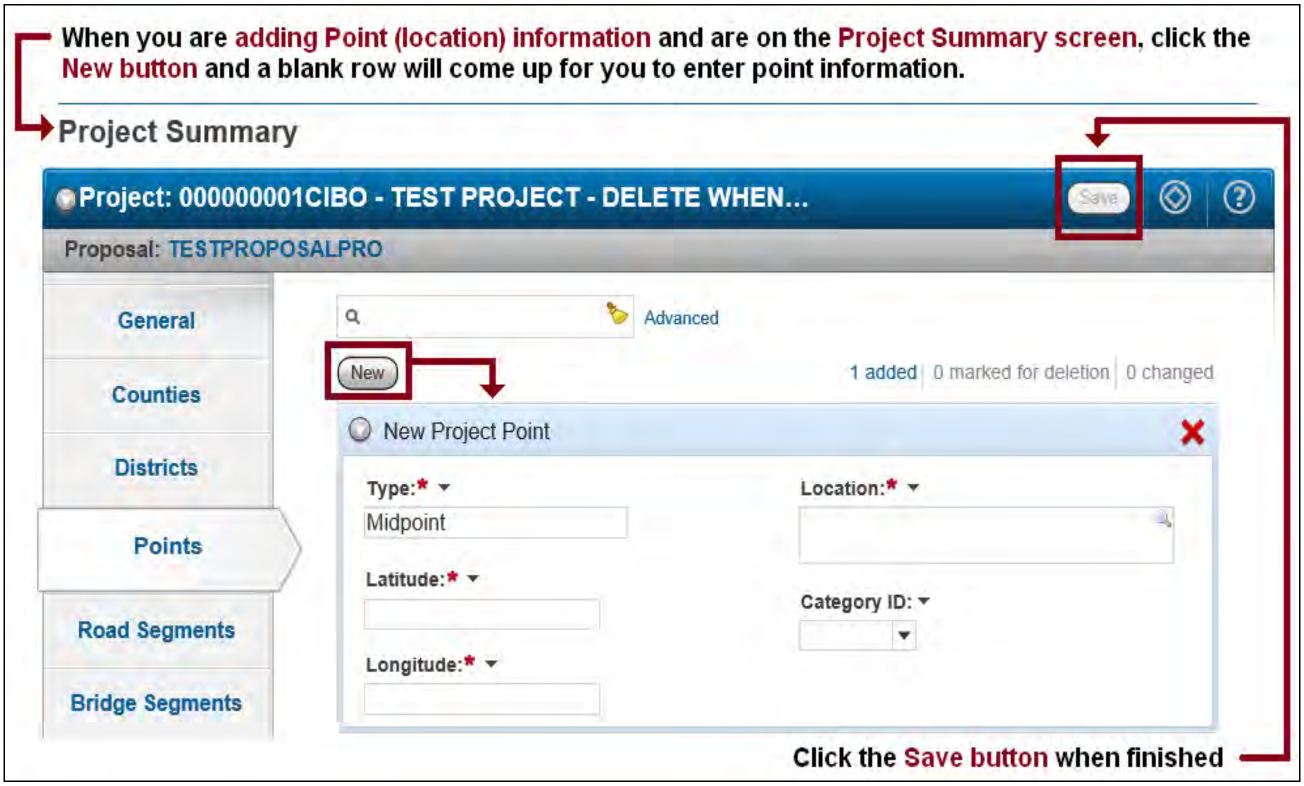


Figure 7 - The Points tab

To add Points (location) information:

1. When the points tab displays, if it is not showing New Project Points segment, click the **New button** and enter the following information:

2. **Type field Required**: This field will default to **Midpoint** and can only be **Midpoint**.

3. **Location field Required**: Enter the Residency name or Various (Ex: Saluda Residency)

4. **Category ID**: Leave blank.

5. **Longitude/Latitude fields Required**: Enter according to the following table:

District	Latitude	Longitude
Bristol	37º-00'-00"	82º-07'-30"
Salem	37º-20'-00"	79º-30'-00"
Lynchburg	37º-15'-00"	78º-52'-30"
Richmond	37º-15'-00"	77º-45'-00"
Hampton Roads	36º-50'-00"	76º-25'-00"
Fredericksburg	37º-57'-00"	77º-00'-00"
Culpeper	38º-22'-30"	78º-07'-30"
Staunton	38º-30'-00"	78º-37'-30"
Northern Virginia	38º-50'-00"	77º-15'-00"

Note about Long/Lat: If a project spans a large area, provide the Long/Lat at the center of the work area. The Long/Lat fields are used by the Civil Rights Division to determine DBE goals using a 75 mile radius from the point provided.

3.2.6 Road Segments tab

Click this tab to **add road segment information** for the project.

- A road segment is a portion of a road that can be described by a set of starting and ending stationing. A Road Segment should be created for each road on the project.
- A road segment can be used to locate a specific section of a road as the site for a project's work or a portion of the project's work.

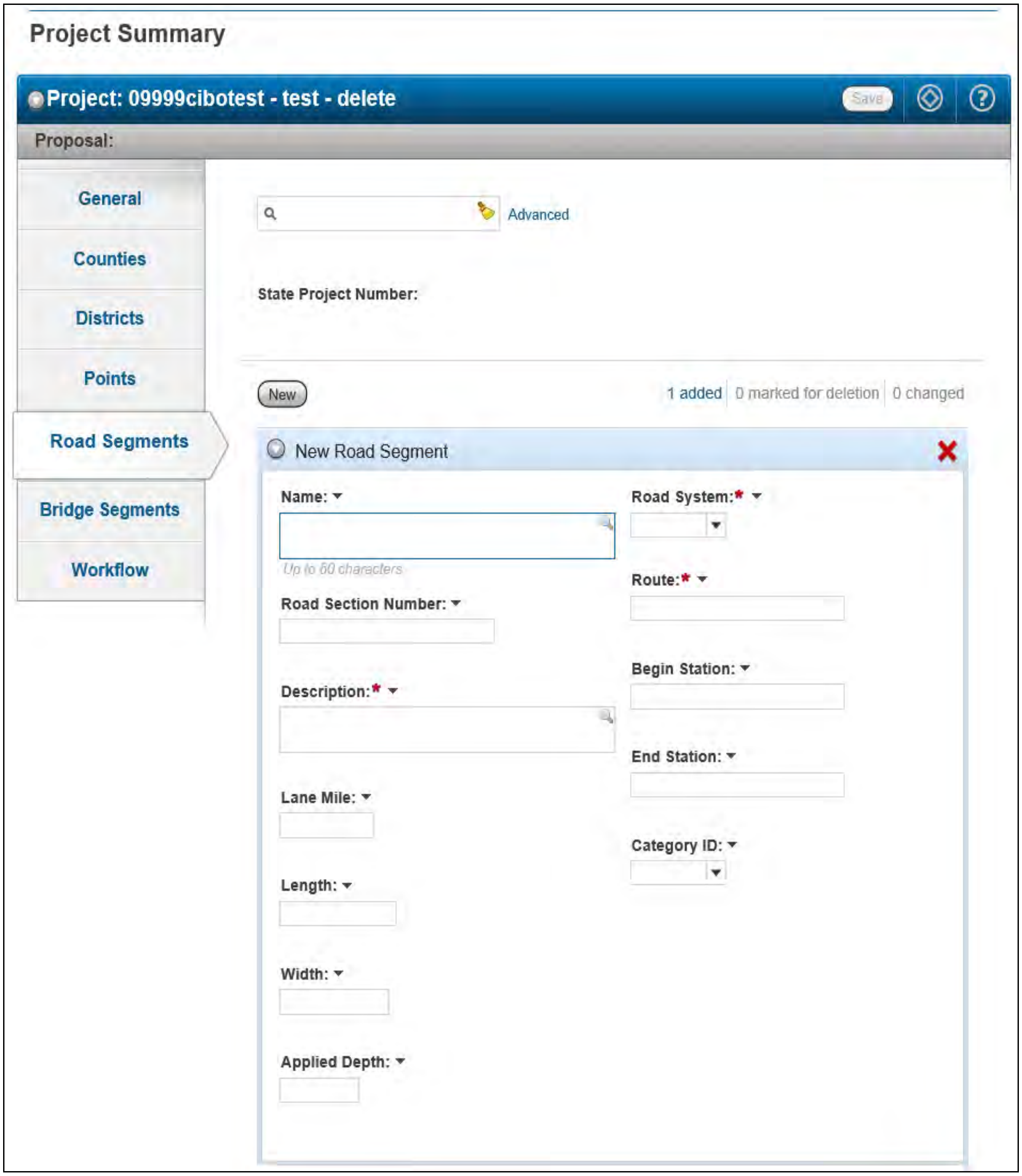


Figure 8 - The Road Segment tab

The fields on the Road Segment tab are:

1) **Name**: Leave blank
2) **Road Section No.**: Enter **F15**. This is the fiscal year that the schedule is let.
3) **Description Required**: Enter the description of the type of work performed on this project.
4) **Lane Mile**: A unit of measure **one standard lane wide and one mile long** (or one kilometer long for metric projects). **Note: The Lane miles should not be separated between Road Segments, the project total Lane Miles should be entered in the *first* road segment of a project.**
5) **Length**: The **length** of the Road Segment in **miles** (or in kilometers for metric projects).
6) **Width**: The **width** of the Road Segment in **feet** (or in meters for metric projects).
7) **Applied Depth**: The **depth of the pavement** in the Road Segment in **inches** (or in centimeters for metric projects).
8) **Road System Required**: The functional class of the road (obtained from the title sheet of the road plans). Select the appropriate code from the drop-down menu.
9) **Route Required**: This field shall be filled out as **PM6A, SS6B** or **ST6C**
10) **Beginning Station**: Leave blank
11) **Ending Station**: Leave blank
12) **Lane Mile**: Leave blank
13) **Category ID**: Leave blank

3.2.7 Bridge Segments tab

The Bridge Segment tab is not used for Schedule/Maintenance work. Skip this Tab.

3.3 Maintenance-funded Project at a single location (i.e., Bridge Repair)

Entry for Maintenance-funded projects at a single location is entered the same as Construction projects with the exception of the Project ID (see Appendix A). Refer to Section 2 – Projects of this manual.

3.4 Workflow tab

The Workflow tab on the Project Summary screen contains the current workflow and phase for the Project**. This is an important setting in Trnsport and should be completed for every estimate.**

1. Click the **Workflow** tab.
2. In the **Workflow** field, click the drop-down arrow and select **VDOT Workflow-Project-Proposal-Contract**.
3. In the **WorkflowPhase** field, click the drop-down arrow and select **Project Definition Phase**.
4. Click the **Save** button.

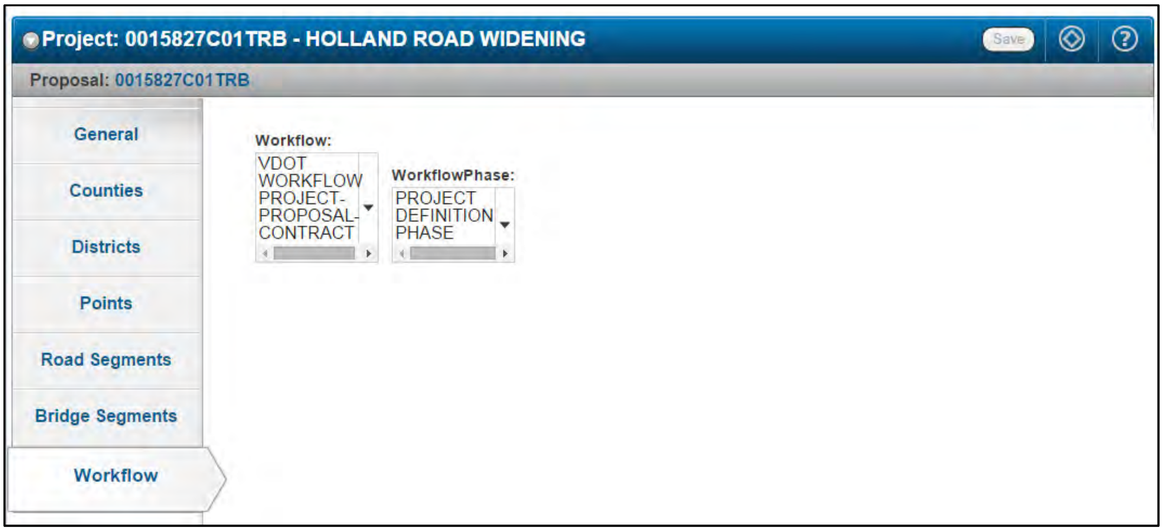


Figure 10 - The Workflow Tab

<u>Workflow Phase Definitions</u>

Project Definition Phase	**Engineers/Designers Use**
Proposal Definition Phase	Construction Division / Select District Staff / District SAPP Coordinators
Advertisement Phase	Construction Division Use Only
Addenda Phase	Construction Division Use Only
Bid Letting Phase	Construction Division Use Only
Post Bid Evaluation Phase	Construction Division Use Only
Preconstruction has ended Phase	Construction Division Use Only
Moved to Construction/SiteManager	Construction Division Use Only
Historical Phase	Construction Division Use Only

3.5 Retrieving a Project

To open an existing project:

4. Click on **Projects** from the Preconstruction Dashboard located on the Home page**.**
   - This will take you to the **Project Overview screen.**
5. Clear out the Search by **clicking on the broom**, then **enter the Project ID** and hit **Enter.**
6. The **Project Summary row** will come up. Make sure that the Project ID is correct and **click on the Project ID.**
7. The **Project Summary screen opens** with the **correct Project ID** being displayed.

Figure 11 - Selecting and Opening a Project

The **Project Summary screen** opens on the General tab.

3.6 Changing a Project

Once opening a Project the **General tab of the Project Summary screen** displays**.**

- Click on the **specific tab** or **Quick Link** to bring up that screen.
- After making your changes, click the **Save button** located on the screen, window or row. If you do not save your work, your changes will be lost when you leave the screen.

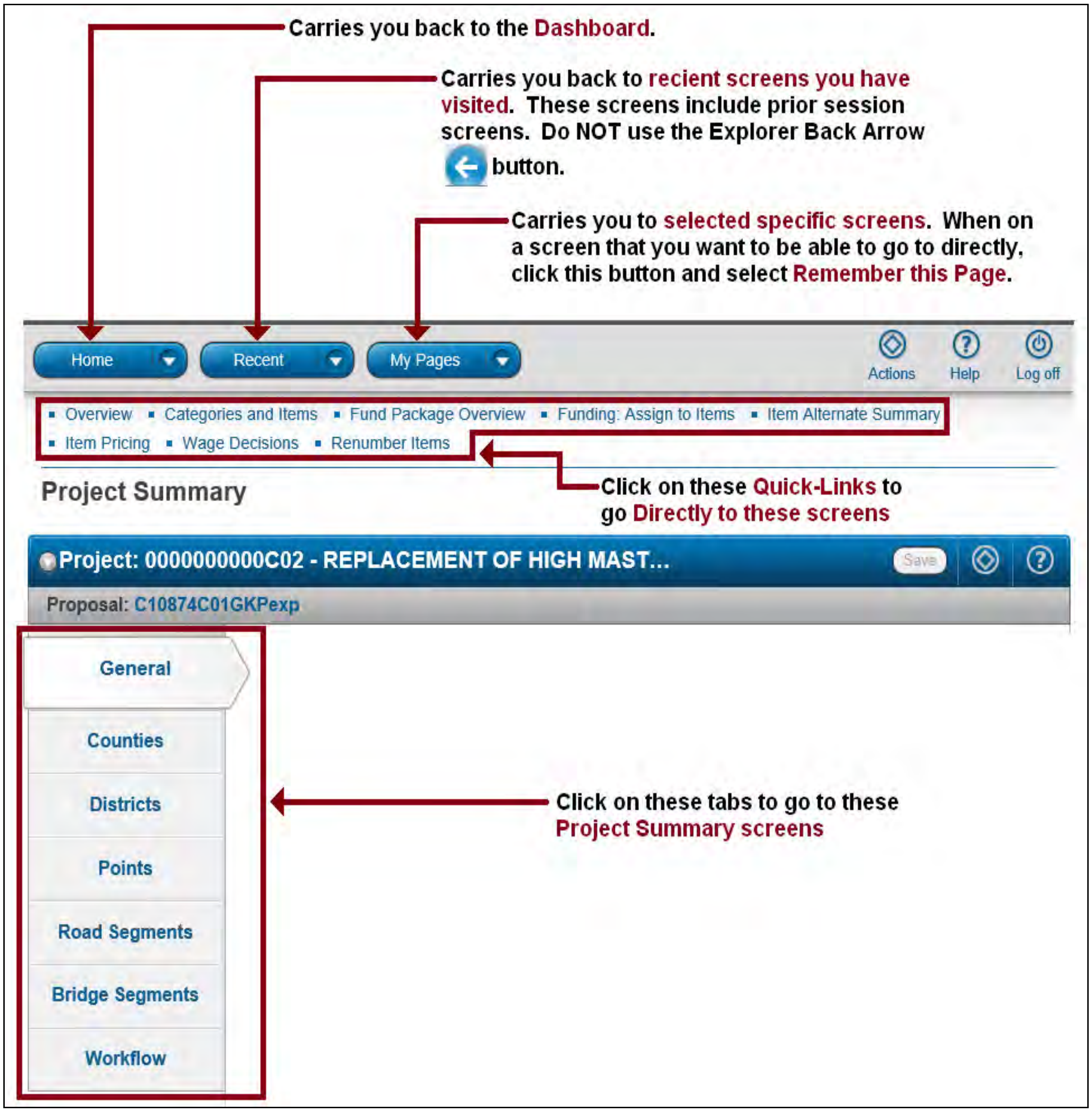


Figure 12 - Bringing Up Specific Tabs and Screens

Note that **changes cannot be made to the Project ID (PCN) field as it is display-only**. If an error was made at the PCN field, you can copy the project (see **4.8 Copying a Project**) and give the correct Project ID when copying. After the copy is made, the incorrect project can be deleted (see **4.7 Deleting a Project**).

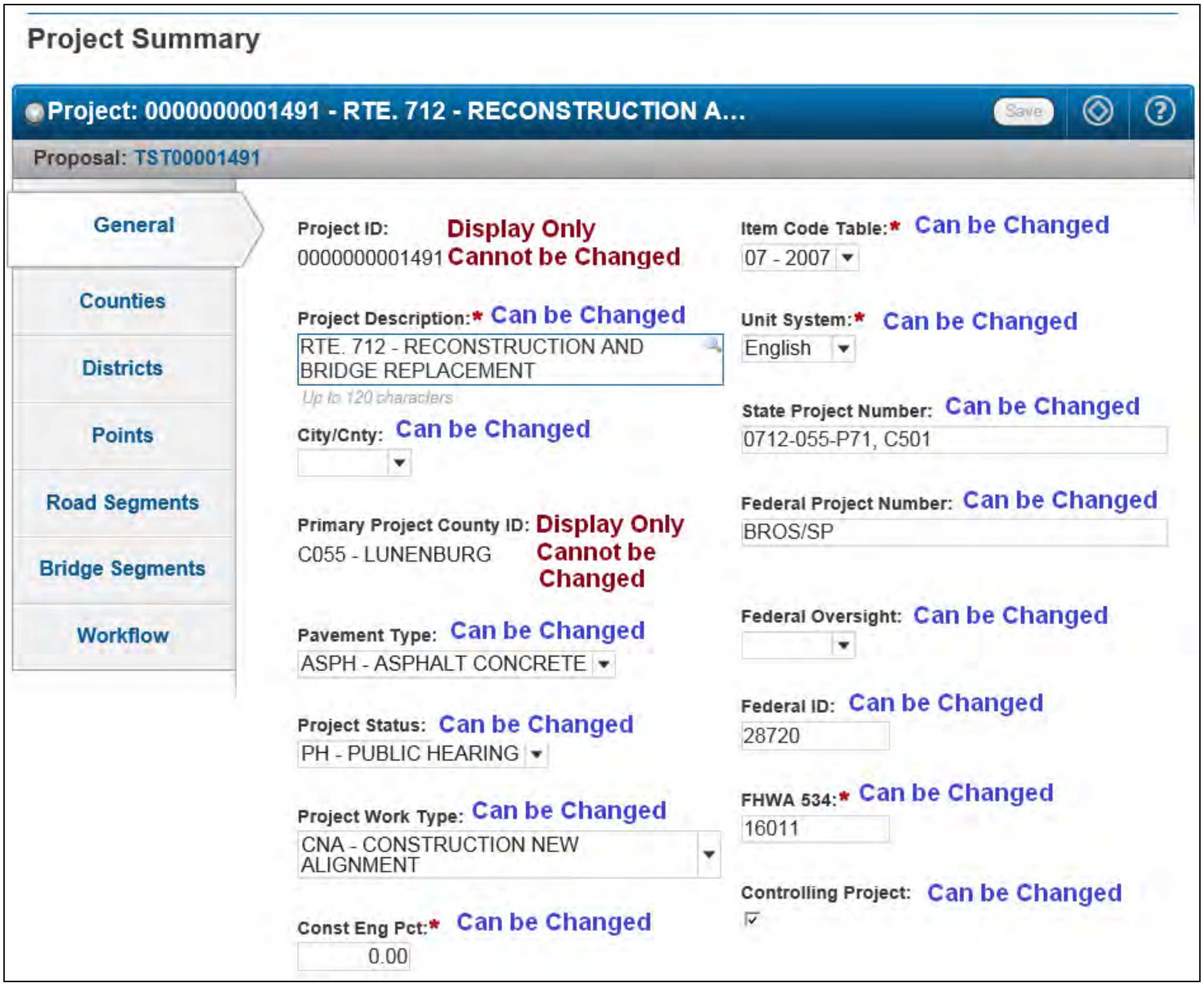


Figure 13 - Changeable and Non-Changeable Fields when Updating a Project

3.7 Deleting a Project

Note: Prior to deleting a project, YOU MUST disassociate the project from the Prime and the Proposal if attached. See Prime and Proposal Sections for details.

Bring up the **Project row in the Project Overview screen** and select the row's **Action Menu**.

1. Click **Delete**.
2. The row will turn **grey** and can be **reversed** by clicking the **Undo** **button**.
3. Click the **Save button** to complete the delete of the Project.

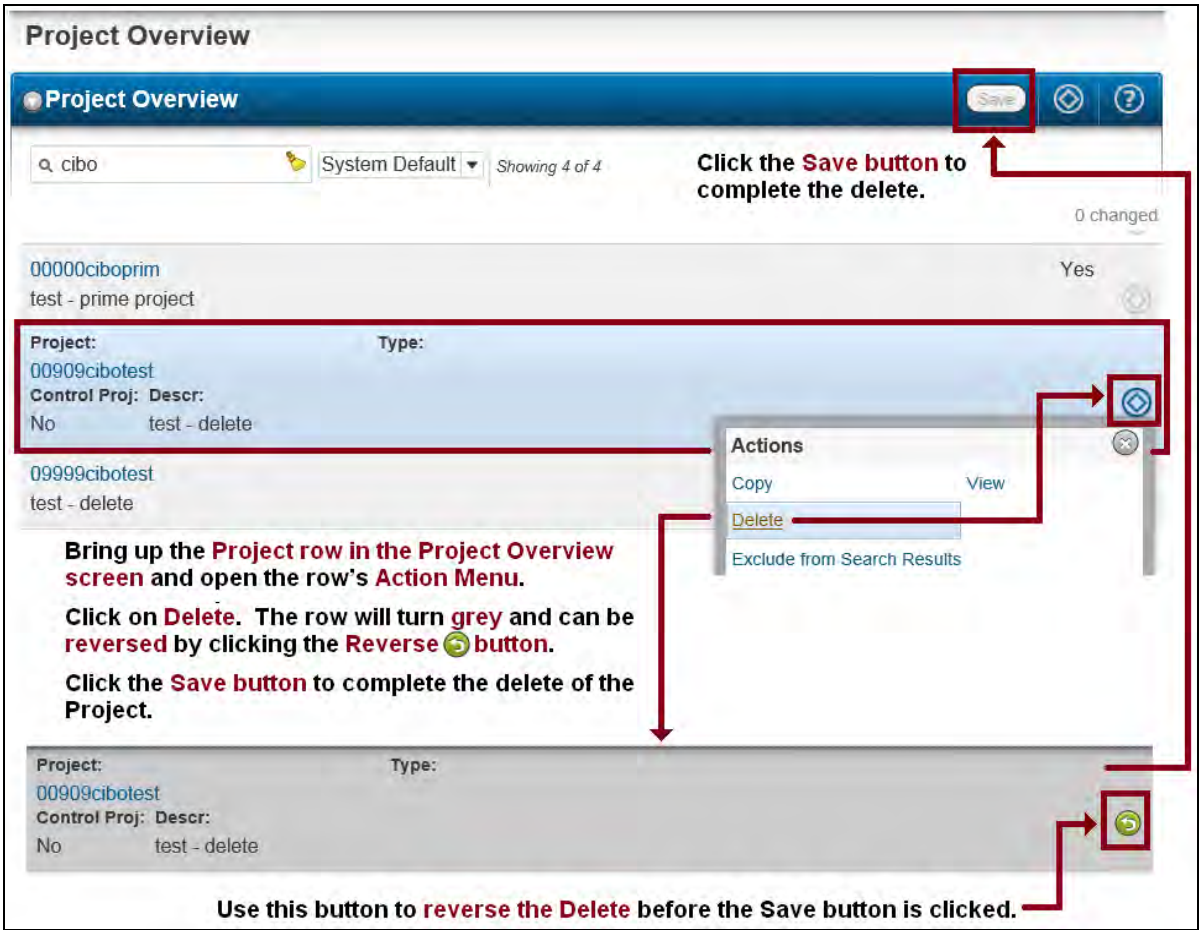


Figure 14 - Deleting a project

After the Delete has been completed, the Project Row will disappear from the Project Overview's list of projects.

3.8 Copying a Project

To copy a project from the Project Overview screen:

1. **Click on the Project's row Action Menu button** to open up the **Action Menu** and **click on Copy.**
2. When you **click on Copy**, it will bring up the **Copy Project screen displaying the old Project to be copied.**
3. Enter a **new and unique Project ID**..
4. Click the **Copy button** on the Copy Project header to complete the copy.
5. The Project will **copy without errors or warnings.** When completed, the Copy will return the user to the copied Project's **Project Summary General tab** displaying the new Project ID.

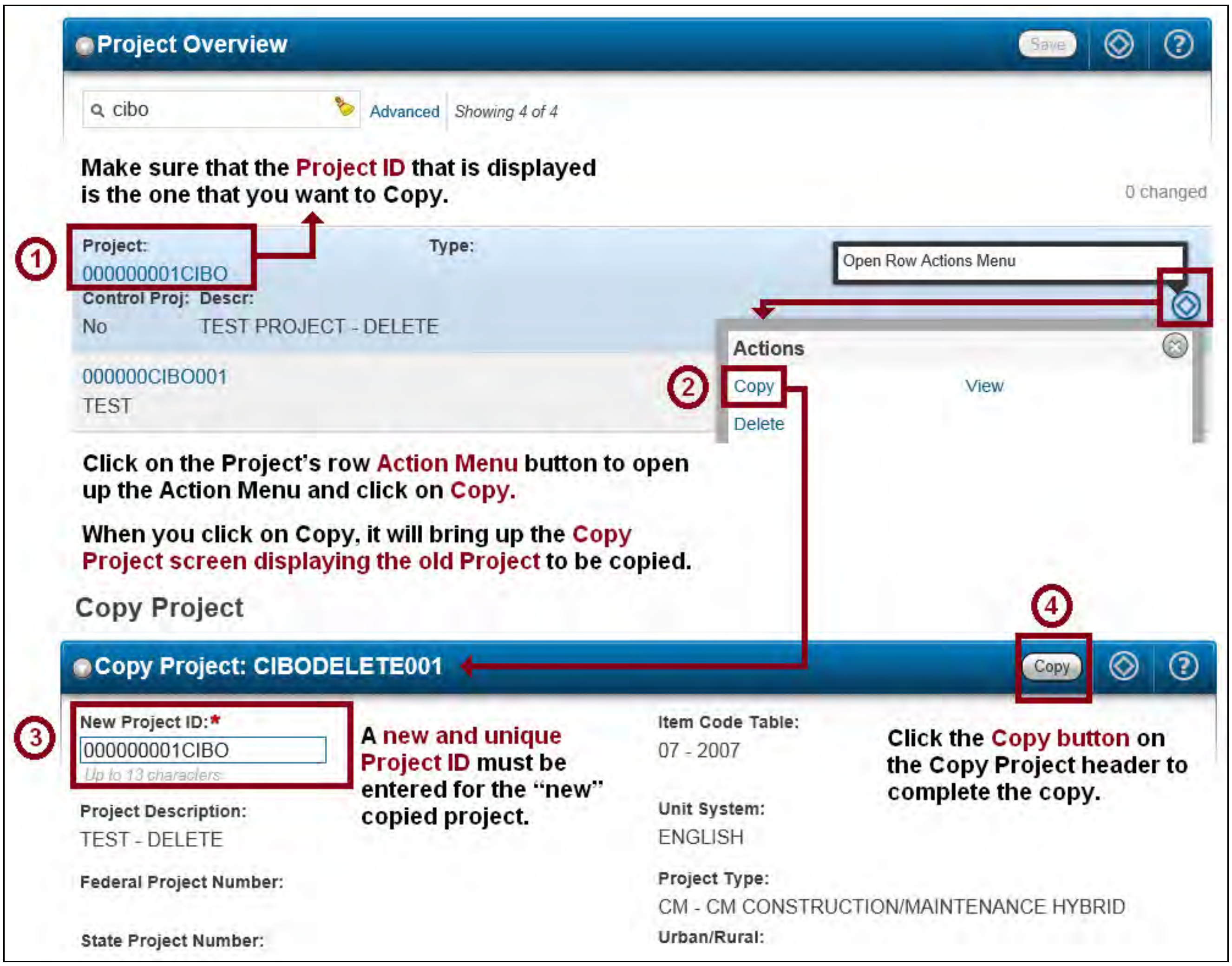


Figure 15 - Copying a Project from the Project Overview Screen

3.8.1 Copy a Project (Alternate Method)

As an alternative, the copy can be performed from the **Project Summary's General Tab for the selected project to be copied.**

- Open up the header's **Action Menu** and select **Copy**.
- When you **click on Copy**, it will bring up the **Copy Project screen displaying the old Project to be copied.**

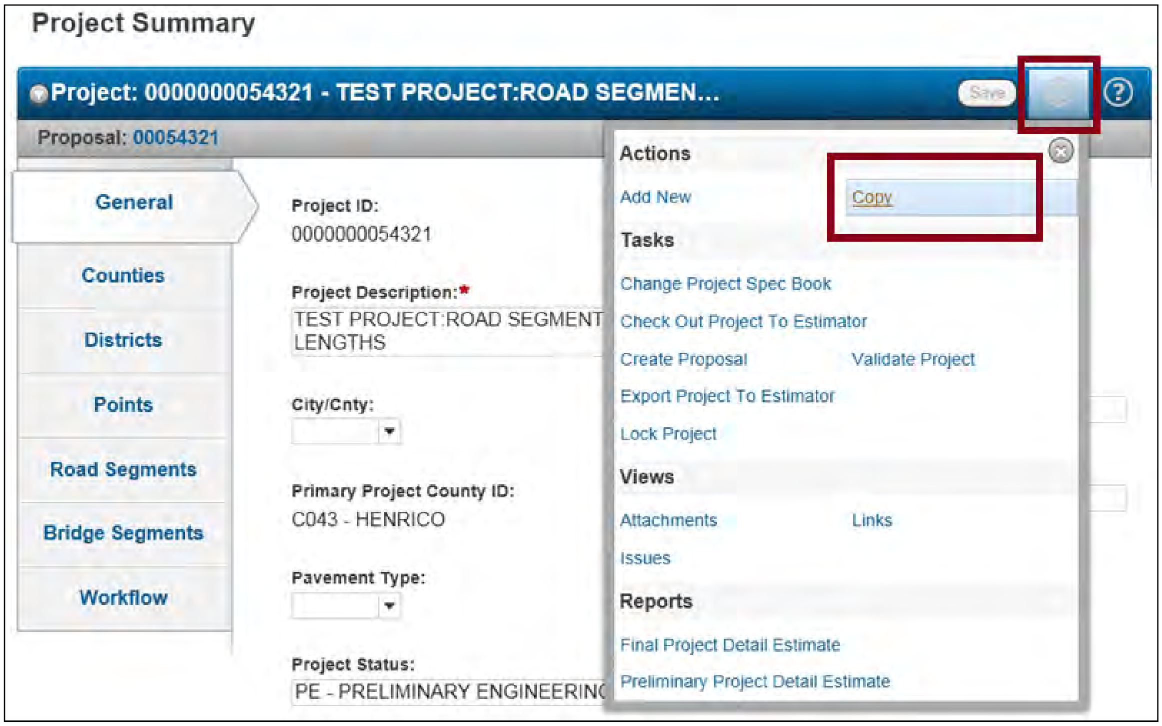


Figure 16 - Copying a Project from the Project Summary Screen

When you **click on Copy**, it will bring up the **Copy Project screen displaying the old Project to be copied.**

4. CATEGORIES

Trnsport uses categories to separate items of work into specific groups. Before you can add your items (quantities) and funding, categories must be created. A separate category must be created for these areas of criteria**:**

- Items having the same Funding Source
- Utility Relocation, Utility Inspector
- State Forces
- Demotion of Buildings (Clearing of Parcels, Closing Wells, Removal of Underground Storage Tanks, Removal of Asbestos)
- Betterment
- Contract Requirements (Incentives/Dis-Incentives) Refer to Chapter 5 for more details
- Construction Engineering and Inspection (CEI) Refer to Chapter 5 for more details
- Contingency – Refer to Chapter 5 for more details

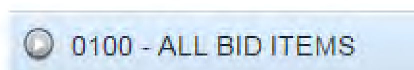
Categories are identified with a four-digit number and fall in **two distinct types**:

1. **Bid** (items the contractor will bid/build) or
2. **Non-Bid** (overhead costs VDOT incurs that the contractor does not bid/build).

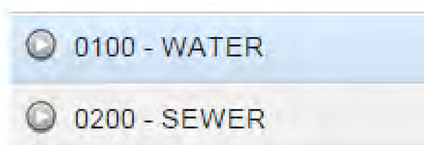
It is imperative that the following numbering scheme be followed:

BID Items: Regular bid items **Category number 0001-1999** Ex: 0100, 0200, 0300, 0400, etc.

Examples:
Road Design, Traffic
or Bridge Project



Utility Project Example:

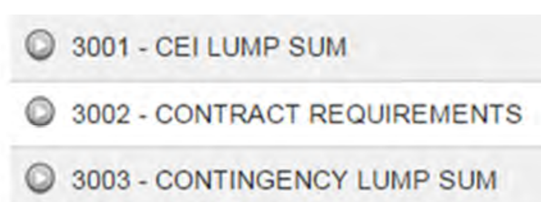


NON-BID Categories must follow the following numbering scheme:

NON-BID Items

State Forces, Utility Inspector,
Railway: **2000-2999**

CEI Lump Sum: **3001**
Contract Requirements: **3002**
Contingency Lump Sum: **3003**



The Categories tab contains a **list of all existing Categories** associated with the project. Each Category row contains **detail information for that Category**.

- To **expand a Category row**, select the Category in the list and click on the **Expand button** for that row.
- Each row contains an **Action Menu** that lists actions that can be performed for the Category.

Figure 1 - Project's Category and Items Summary Screen

4.1 Adding a Category

To add a new Category perform the following steps:

1. Select the Categories Tab.
2. Click the **New button**
3. If the new Category is not expanded to show the fields, click the **Expand** **button.**
4. Enter information in the fields listed.
    - Only the **Category ID, Category Description, Contingency Pct.** and **Federal Eligibility (Y/N)** are **required fields**. The other fields are **optional.**
5. Click **Save** when you are finished to save the new Category.
6. The system displays a message to confirm that the new information was successfully saved.

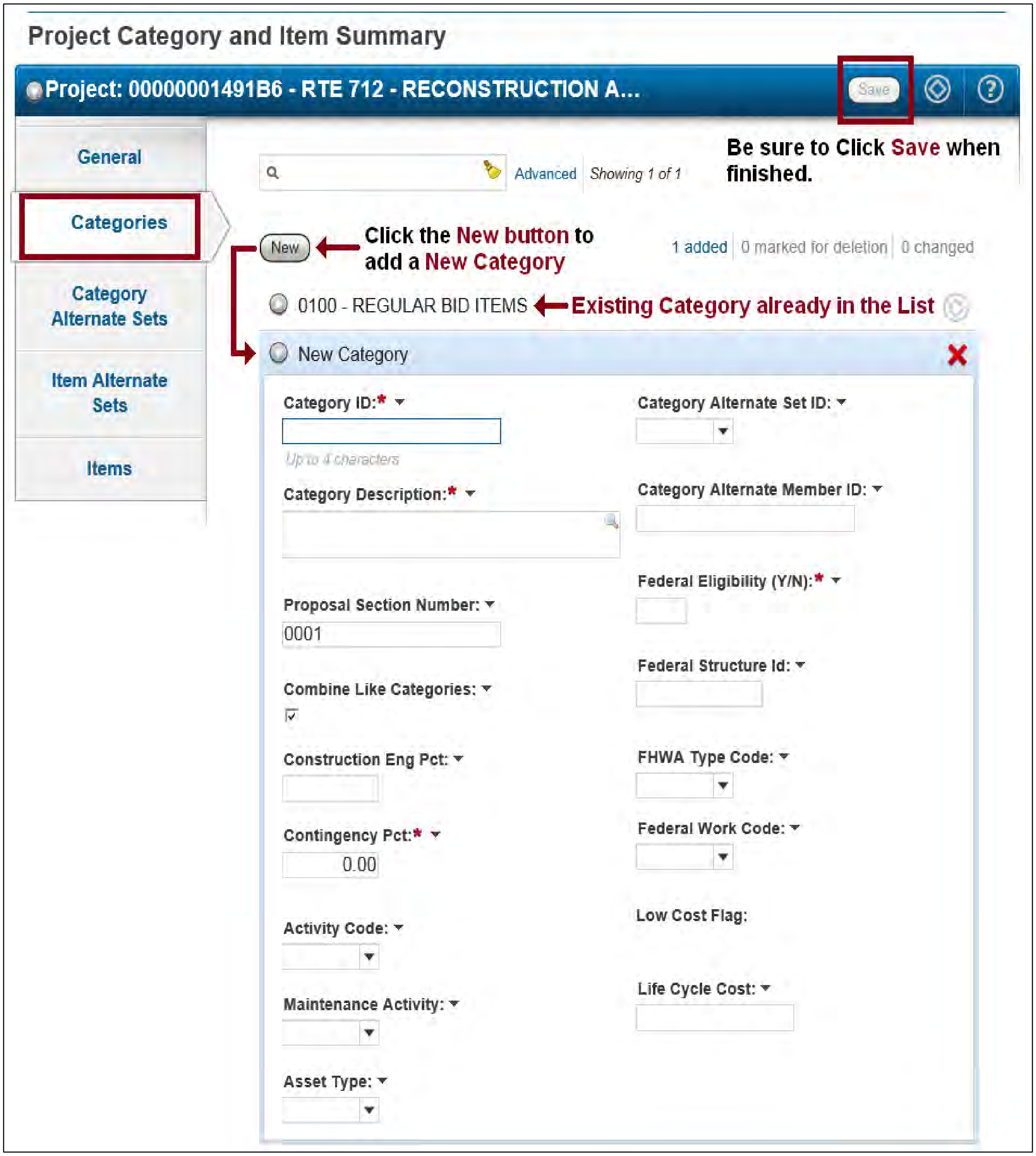


Figure 2 - Adding a New Category

CATEGORY FIELD DESCRIPTIONS:

Category ID (Number) Required: Enter the unique 4-digit category number. Use the following format to number the categories:

Regular bid items (including field office): 0100, 0200, 0300, 0400, etc.

Non-bid items

State Forces, Police Patrol, RW Monuments, Utility Inspector, Railway, etc: (2000-2999)

Lump Sum CEI (3001)

Contract Requirements (3002)

Lump Sum Contingency (3003)

Note that when the estimate is printed, the categories will be arranged numerically; therefore, some thought should be given to the category number assignments.

For Bid Options or Alternates: The Construction Division plan reviewer section is responsible for building the bid options/alternates when necessary.

Category description Required: Enter a description. Ex: REGULAR BID ITEMS

Proposal Section Number: Defaults to "0001" and should not be changed.

Combine Like Categories: The checkbox will default to checked ☑ and should not be changed. This field combines several different categories (as long as the funding source and funding percentages are the same) into a single proposal section.

Construction Eng. Pct (aka CEI) : A percentage entered in this field will calculate the CEI costs for all the items under that Category. If a percent was entered at the Project level (on the General tab) the system will default to the category level. It is good practice to enter the same number on the General tab as entered here.

It is recommended to utilize the Lump Sum method for entering CEI in Trnport estimates, please see 5.3 of this manual for complete details.

Note: If you use the Lump Sum method for entering the CEI, you must enter 0.00 in this field and on the General Tab.

Contingency Pct Required: When a number is entered in this field, it will calculate that percentage for all the items in that Category. **NOTE: Contingency percentages should only be used on Regular Bid Item Categories (Categories 0001 through 1999)**

Contingency costs are based on L&D's IIM-LD-249 --2-Tiered Approach to Project Oversight:

1. Tier I = **5.0** percent

OR

2. Tier II = **10.0** percent

It is recommended to utilize the Lump Sum method for entering Contingencies in Trnport estimates, please see 5.3 of this manual for complete details.

Note: If you use the Lump Sum method for entering the Contingency, you must enter 0.00 in this field.

Activity Code Required: Choose appropriate value from the drop-down menu. This field classifies and distinguishes between the federal and state funding pool for the Cardinal financial system.

The Engineering Divisions uses most often:

a.) 631 = Federal (Participating)
b.) 731 = NonFED (State – Non Participating)

Utilities:

a.) 656 = Federal
b.) 756 = State

Demolition of Buildings:

a.) 668 = Purchase of Buildings - Federal
b.) 768 = Purchase of Buildings –NonFED (State)

Maintenance Activity: This field is for maintenance-funded projects only. Enter 72000. Leave this field blank if the project is not a maintenance-funded project.

Asset Type: Select an appropriate choice from the pull-down for maintenance-funded projects only.

Category Alternate Set ID: A unique identifier assigned to each Category Alternate Set in the Category Alternate Set List. Category alternate sets contain one or more alternate members, and can be used to determine Section alternatives. A Project may contain multiple category alternate sets. Alternates are the Construction Division Plan reviewer's responsibility. **Leave this field blank**.

Category Alternate Member ID: A unique identifier assigned to each category alternate member of a Category Alternate Set. A Category cannot be assigned to a Category Alternate Set without identifying a Category Alternate member. Alternates are the Construction Division Plan reviewer's responsibility. **Leave this field blank**.

Federal Eligibility Required: Enter **Y** or **N**. This designation can be found in iPM.

Federal Structure ID: Enter the 5-digit HTRIS Structure ID. This is a unique 5-digit number assigned to the structure and may be found on the first screen of the structure inventory in the HTRIS system. (This is not to be confused with the 4-digit Structure Number assigned by the State of Virginia.) Enter the Structure ID in the first 5 spaces of this field, leaving the remainder of the field blank. (Enter leading zeroes if necessary to fill 5 spaces.) If it is not a bridge project, leave this field blank.

The District Safety Inspection personnel in the Districts shall be contacted for the Structure ID.

FHWA Type Code: Choose appropriate value from the drop-down menu. This table consists of specific Federal Work Type codes. See Appendix F.

Federal Work Code: Choose appropriate value from the drop-down menu. See Appendix G.

Low Cost Flag: **Display only** – cannot be changed on this screen. A system generated indicator for a Category Section, or bid item that contributes to the low cost total in an estimate.

Life Cycle Cost: The expected maintenance cost over the life of the work being performed. The value is added to the bid amount for the alternate category in low cost calculations and decisions, but it is not part of the actual award amount.

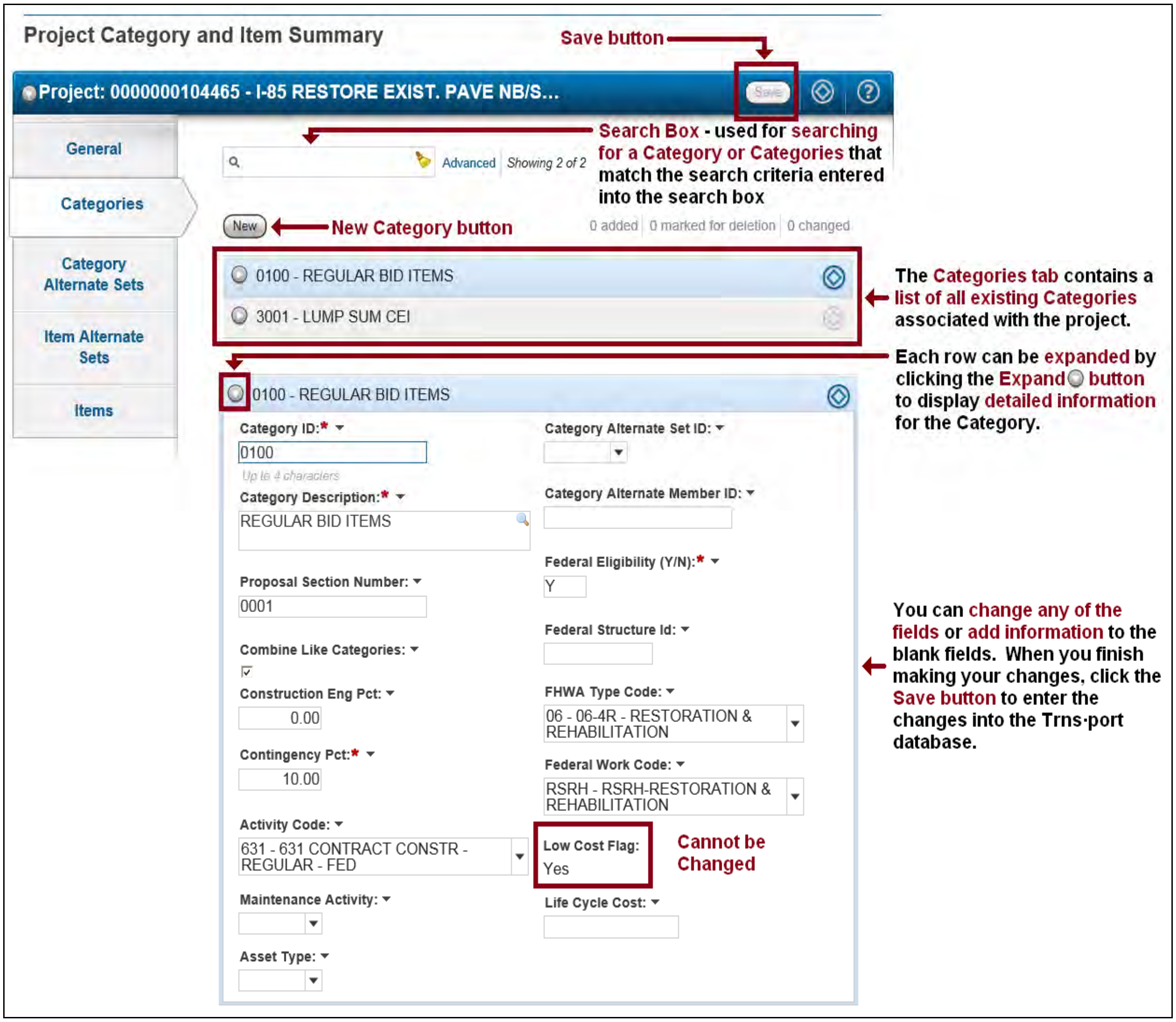


Figure 3 - The Project Category and Item Summary's Categories Tab

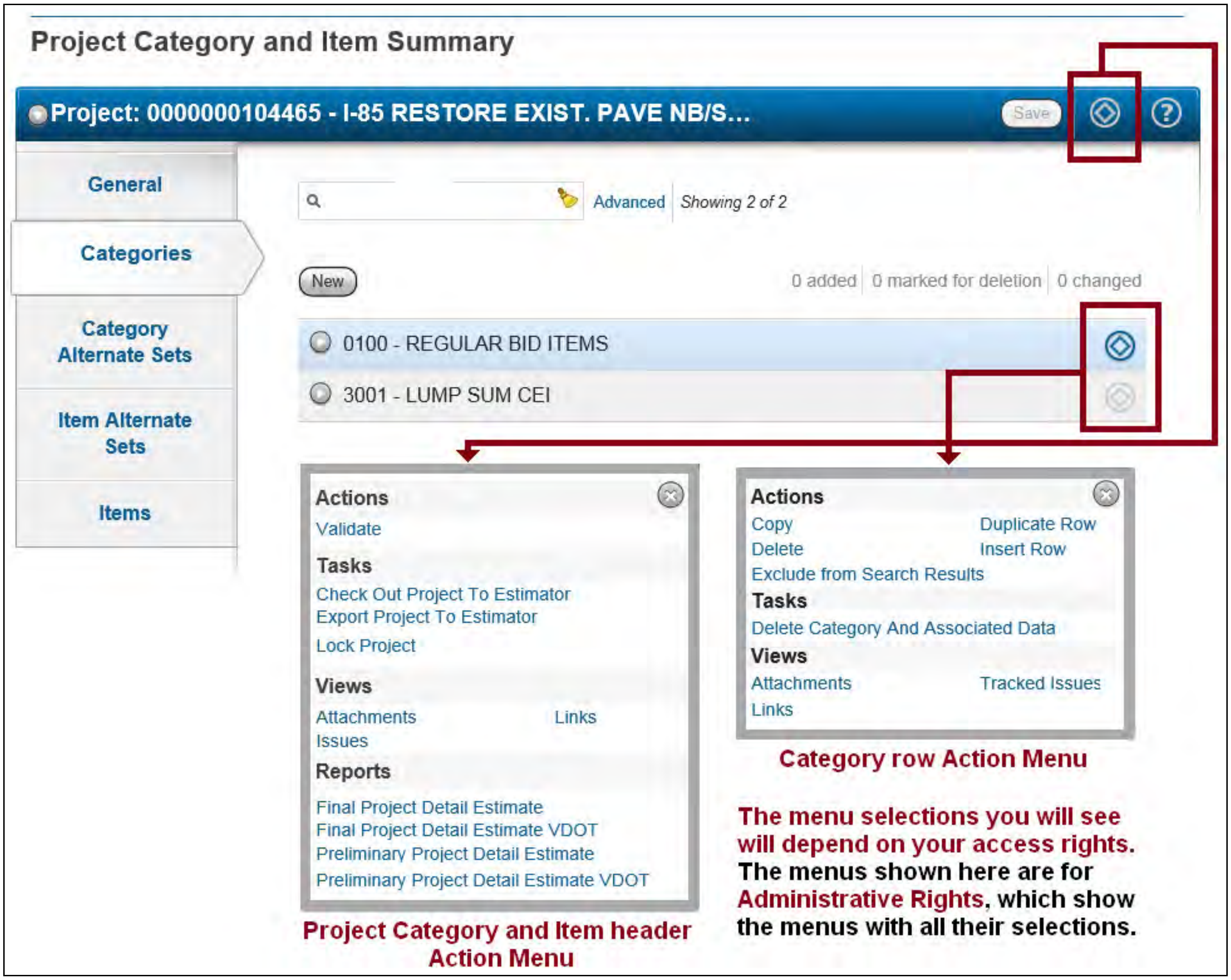


Figure 4 - Project Category and Item Summary Action Menus

4.2 Changing a Category

To **change information for a Category,** perform the following steps:

1. **Locate and list the Project** in the Project Overview screen.
2. **Click on the Project ID** in the overview list to bring up the Project's Project Summary screen.
3. **Click on the Category and Items quick link** at the top to bring up the Project's Project Category and Items screen.
4. **Click on the Categories tab** and **expand the category** to be changed.
5. **Change or add information** for the Category.
6. Click the **Save button** on the screen's header line to save the changes.

You can **change any of the fields** except for the Low Cost Flag or **add information** to the blank fields.

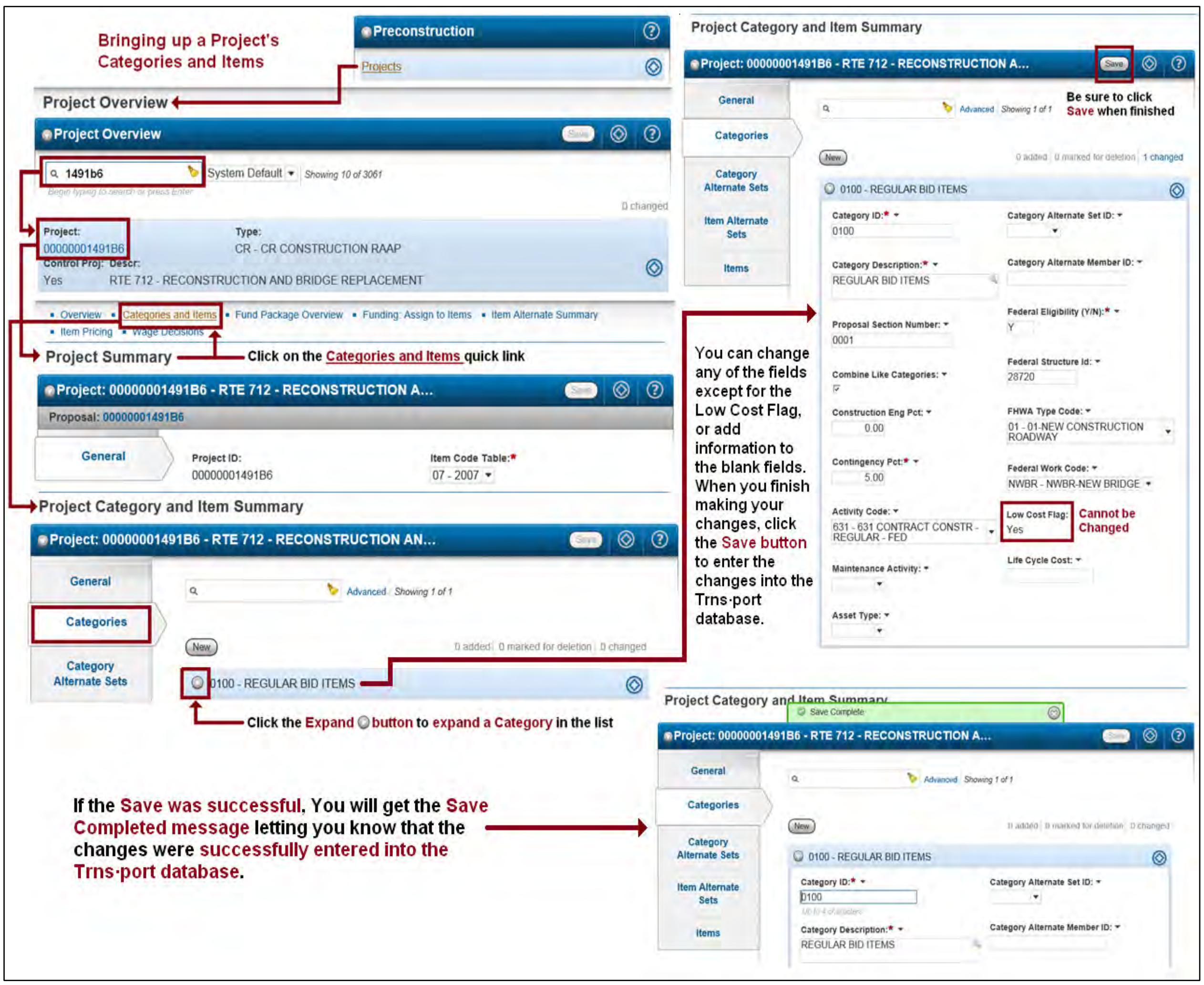


Figure 5 - Changing a Category

4.3 Copying a Category

If you are adding a new category to a project that is similar to another category, you can **create a copy of the existing category** and **assign it a new Category ID.** This saves the time it would take to enter all the category detail information again. You can then make any minor changes required for the new category. **Note: All items that are within the Category are also copied.**

- You can copy a category to the current project or another project, and choose whether to include associated data such as locations, funds, and alternate sets.
- The Category may be copied into any existing Project in your Control Group.

Follow these steps to **copy a Category:**

1. On the **Project Summary screen**, click the **Categories and Items Quick link**.
2. On the **Project Category and Item Summary screen,** click the **Categories tab.**
3. Locate the Category you want to copy, and select **Copy** from the Actions Menu on the Category row.
   - The system takes you to the **Copy Category screen.**
4. If you are **copying the Category to another Project,** enter the **destination Project's ID** in the Project ID field.
5. Click in the **Category ID** field, and replace the value with a **unique ID** for the new Category.
   - Be sure to follow the **format for numbering Categories.**
6. If you want to **copy associated information to the new Category**, select the appropriate check boxes for the type of data you want to copy: **Copy Fund Packages, Copy Alternate Sets,** and **Copy Locations.**
7. Click the **Copy Category to Project button** on the screen header.
8. The system **validates the new Category ID, adds the new Category to the destination Project,** and takes you back to the Categories tab.
9. When you **copy a Category to the same Project,** all the information in the source Category is copied to the new Category with the following exceptions and differences:
   - The **Low Cost Flag** field values are determined automatically by the system after the copy is made.
   - **Project Item Line Number** field values in the copied Category will not necessarily match the source values, but will be determined by the order of insertion into the Project.
10. When you **copy a Category to another Project**, all the information in the source Category is copied to the new Category with the following exceptions and differences:
    - The **Low Cost Flag** field values are determined automatically by the system after the copy is made.
    - **Project Item Line Number** and **Project Item ID** field values in the copied Category will not necessarily match the source Project's values, but will be determined by the order of insertion into the destination Project.

11. If you **do not include the Category's associated information** in the copy, the system clears the **Section ID, Fund Package ID, Alternate Set ID,** and **Alternate Member ID** fields.

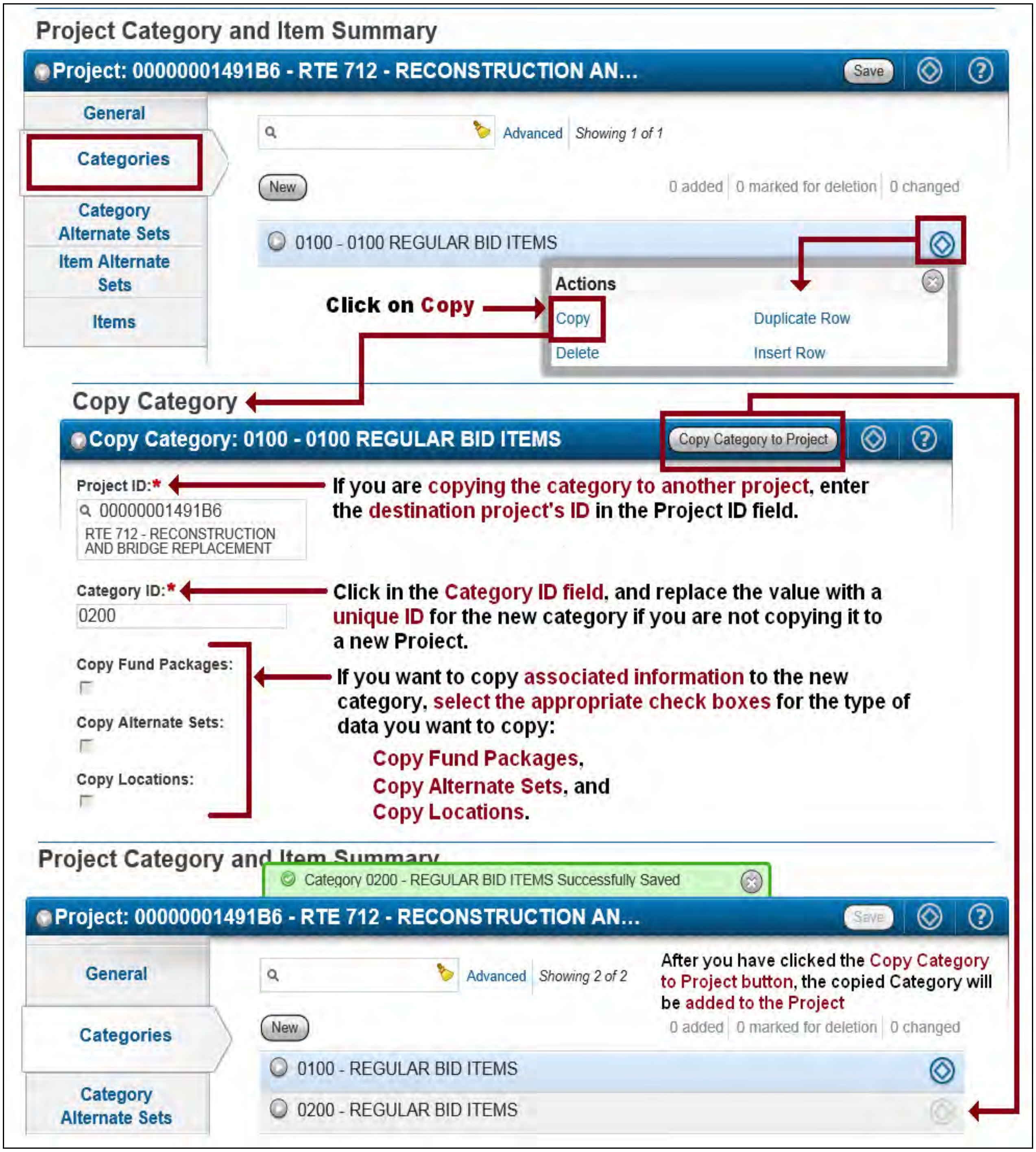


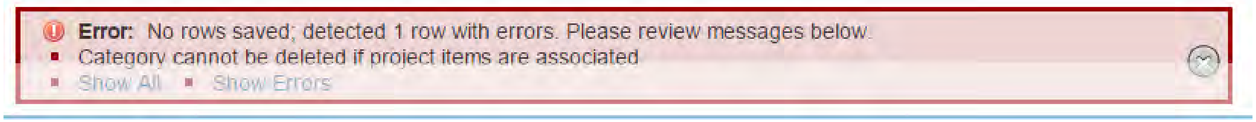
Figure 6 - Copying a Project's Category

4.4 Deleting a Category

There are 2 methods to delete a Category and this is dependent upon whether the Category you are deleting has items within that Category.

To Delete a category perform the following steps:

1. Select the action button on the Category row you wish to delete
2. Select Delete.
3. If the Category has items within it, the following error displays.

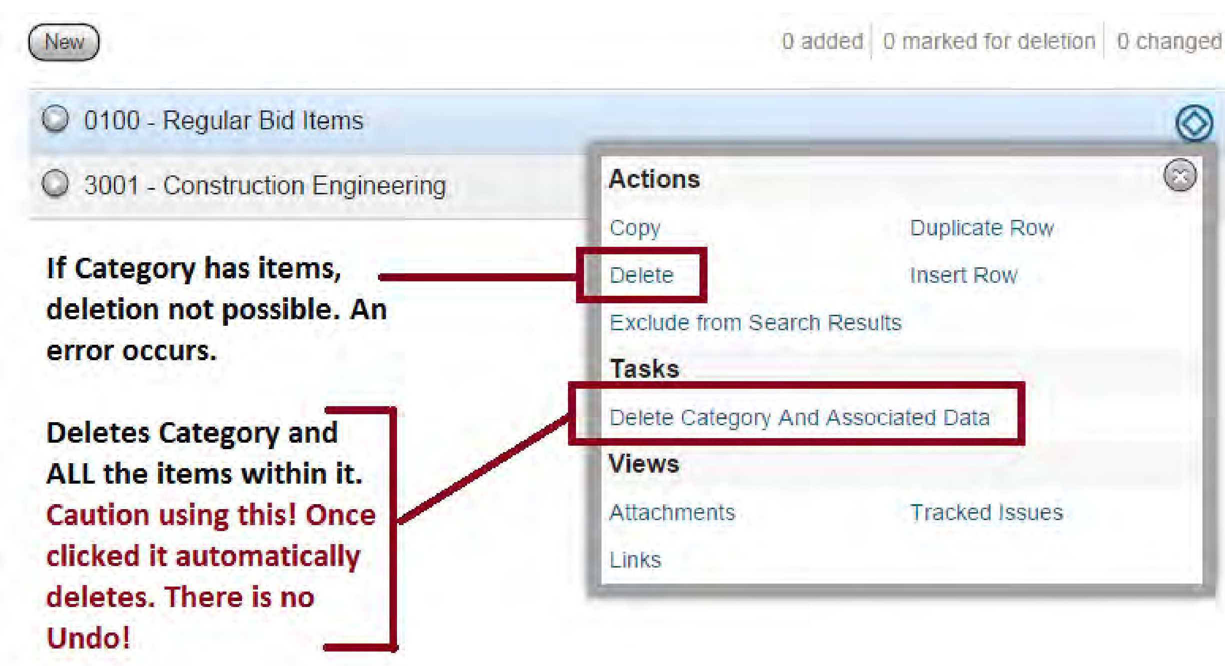


4. If you are certain you want to delete the Category AND all the items within it, select the action button on the Category row you wish to delete.

5. Select Delete Category and Associated Data.

   This means all the items under that Category will be deleted!!

   USE EXTREME CAUTION: Once this is selected it deletes automatically. There is no opportunity to Undo!



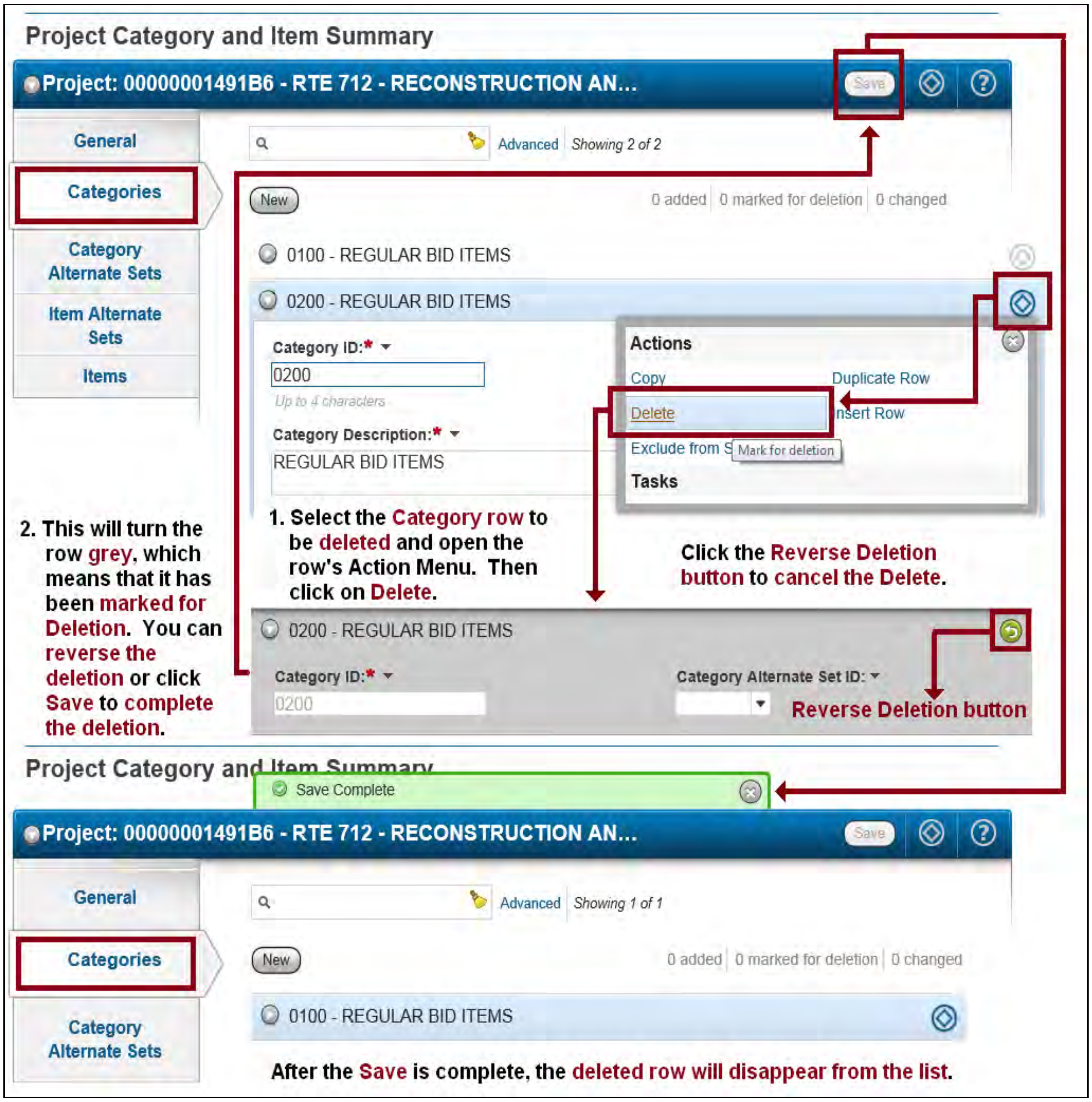


Figure 7 - Deleting a Category with No Items

5. MANAGING ITEMS

The **Items** tab on the Project Category and Item Summary component contains an accordion list of all the items in the project. Each row represents one item. Each row displays an Actions button and values for the **Project Item Line Number, Item ID and Description, Quantity,** and **Unit of Measure fields**.

If you are working only with the items in a single project category, you can use the **Category ID** filter at the top of the page to filter out of the list all items except those you are working with. Click the **Category ID** down arrow, and select the category you want. You can choose **No Filter** to display all items in the list.

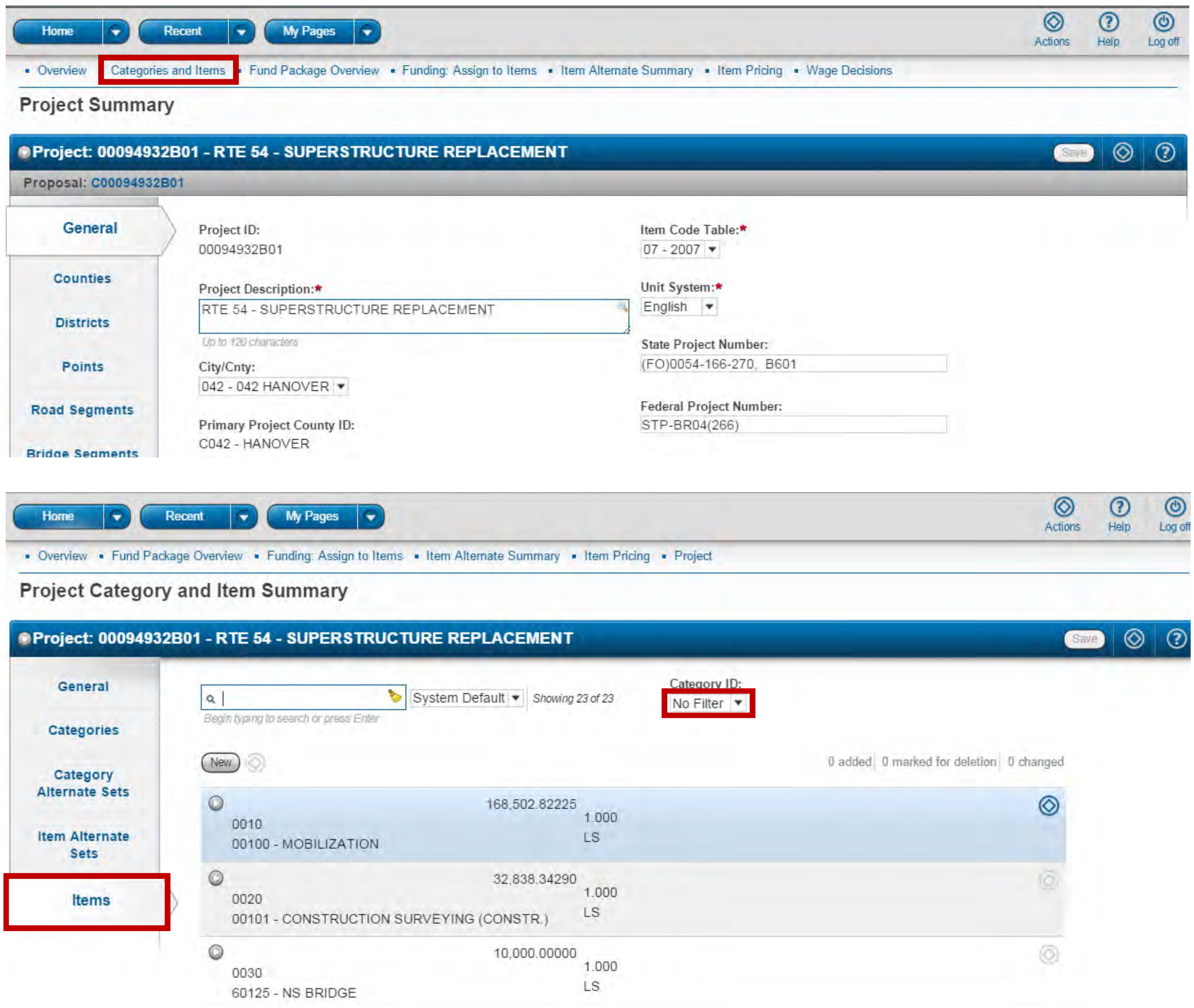


Figure 1 – Project Category and Item Summary Screen

5.1 Adding an Item

There are 3 ways to add an item to a project. You can select the **New** button on the Items tab or select the actions button beside the New button and select **Quick Add Items** or **Select Items**.

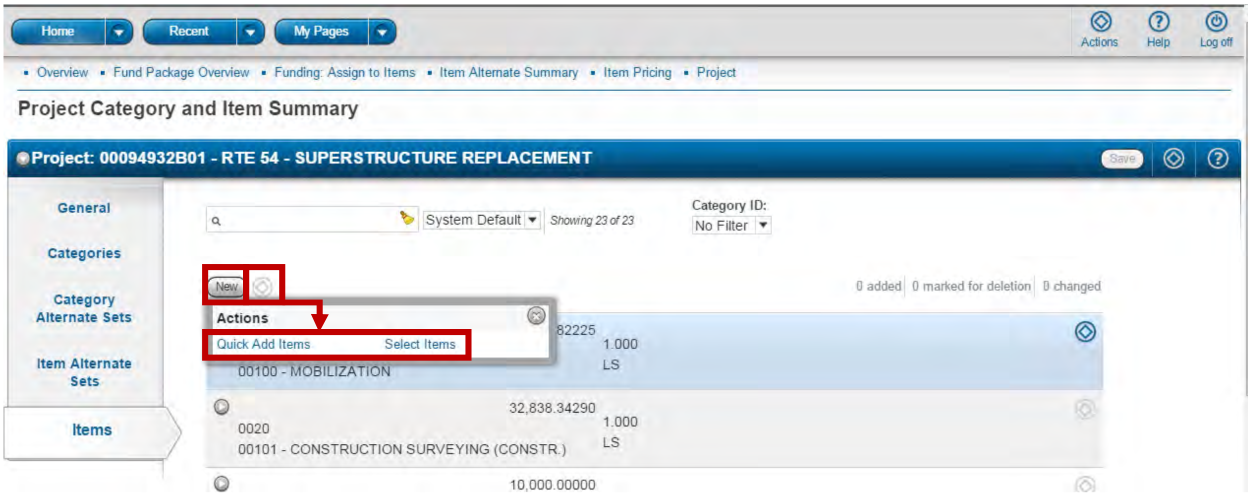


Figure 2 – Project Category and Item Summary Screen

5.1.1 Adding an Item with the New Button

From the Project Category and Item Summary, click the **New** button. A New Project Item will display. Once you have filled in the fields, click the **Save** button at the top of the page.

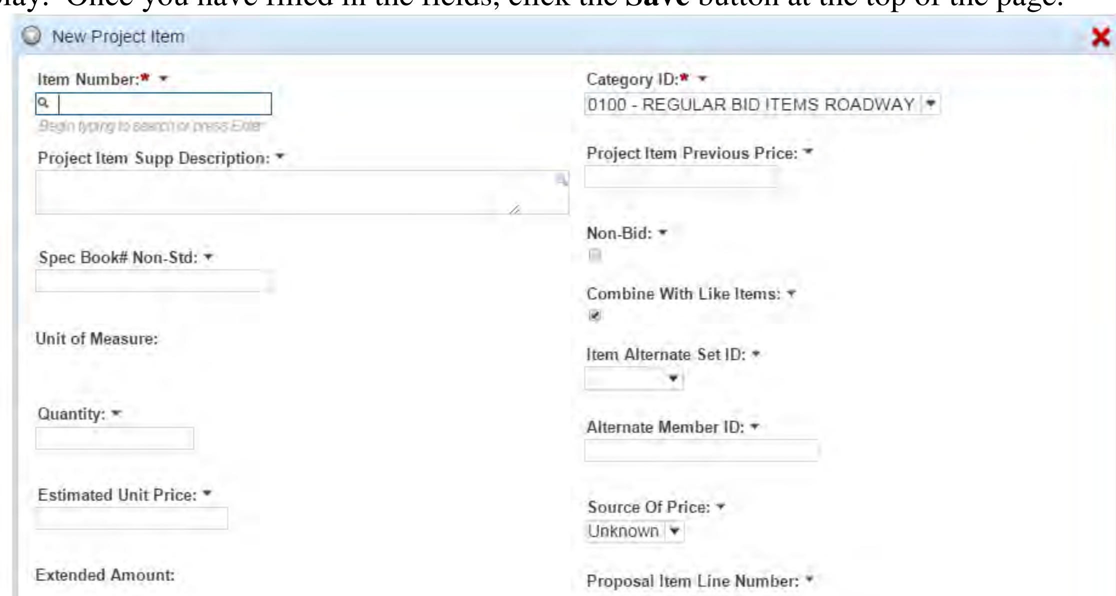


Figure 3 – New Project Item Screen

ITEM FIELD DESCRIPTIONS:

Item Number Required: Enter the 5-digit number for the item. The item number or description will search the item code table. Once the Item Code Table displays your item, click the item to fill in the field.

Project Item Supp Description: This field becomes required for Non-Standard items only. Enter the wording needed to complete the non-standard item description.

IMPORTANT:
Non-standard items: Before using a non-standard item, be certain that there is not a standard item that is applicable. Once you determine that there is not an applicable standard item, you will need to select one of the items in the table that is prefixed with NS. These items are interspersed throughout the table in places where deemed appropriate. Additionally, there are very general NS items at the end of many of the groupings; select from these very general NS items only as a last resort.

Note: The same NS item number may be used more than once in an estimate as long as the description you give at the **Project Item Supp Description** field is unique.

There will be occasions when you will be entering NS items for multiple projects that will be advertised on the same contract. Consideration must be given to the non-standard descriptions as to whether or not you wish the items to be combined.

- If you do not wish items to combine, be sure to give unique descriptions in this field.
- If you wish items to combine, the descriptions given in this field must be exactly the same. In addition, any other information you enter on the item screen must be exactly the same (spec book#, source of price, etc.).

Note: The "NS" will print on the estimate, but will not print on the proposal.

Spec Book# Non-Std: This is a required field for all Non-Standard items entered in an estimate. Up to three Specification Numbers, or 11 characters, shall be entered. Enter the Specification Number here, if known. If the Specification Number does not reference a location providing measurement and payment details for the Non-Std Item you MUST provide measurement and payment information for the Non-Std Item, to do so you shall enter "**ATTD**" to indicate Special Provisions are attached in the contract *or* "**PLAN**" to indicate pertinent information is on the plans. The Special Provisions and pertinent information associated with "ATTD" or "PLAN" must be submitted to the Construction Division for review and acceptance.

Unit of Measure: This field will display the units of the item that you selected

Quantity: Enter the quantity of the item. **Please Note: Enter the quantity of the item to the nearest 10th of the quantity on the plan, for example 2.5. Quantities entered in transport need to match what's shown on the summary that the estimate is built from.**

Estimate Unit Price: Leave this field blank for standard items. When you have finished your estimate, the prices will be generated when you generate bid based prices. The designer has the option to overwrite the generated price.
A Price must be filled in for non-standard items. Be sure to lock the price.

Extended Amount: When the quantity and estimated price are filled in, the extension of those two numbers is shown in this field.

Price Lock Flag: Select the checkbox if you would like to lock the unit price for the selected item including all Lump Sum items where the users enter a price.

Category ID Required: Select the Category that you wish to assign the item to from the drop down list. All items in the estimate must be assigned to a category.

Project Item Previous Price: This field is reserved for Construction Division. Changes from the estimated price can be tracked by utilizing this field.

Non-Bid Item: Default is unchecked. Any Item under Categories 2000 through 3003 should have this box checked, or these are items the Contractor shall not bid on.

Combine w/Like Items: Defaults to checked to combine like items on the proposal; uncheck box if you do not want to combine items on the proposal.

Item Alternate Set ID: This field is only used by the Construction division, leave field blank.

Alternate Member ID: This field is only used by the Construction division, leave field blank.

Source of Price: This value will be set once the item is priced and determined by the method the price was created.

Proposal Line Number: This field is filled in by Trns·port after generating line numbers in the proposal.

5.1.2 Adding Items with Quick Add

From the Project Category and Item Summary, click the action's button and select **Quick Add Items**. This will bring you to the Quick Add items screen. Fill in the fields and select the **Save** button to save the item. Note that **Suppl Descr** and **Spec Book NS** fields will be required if you are entering a non-standard item.

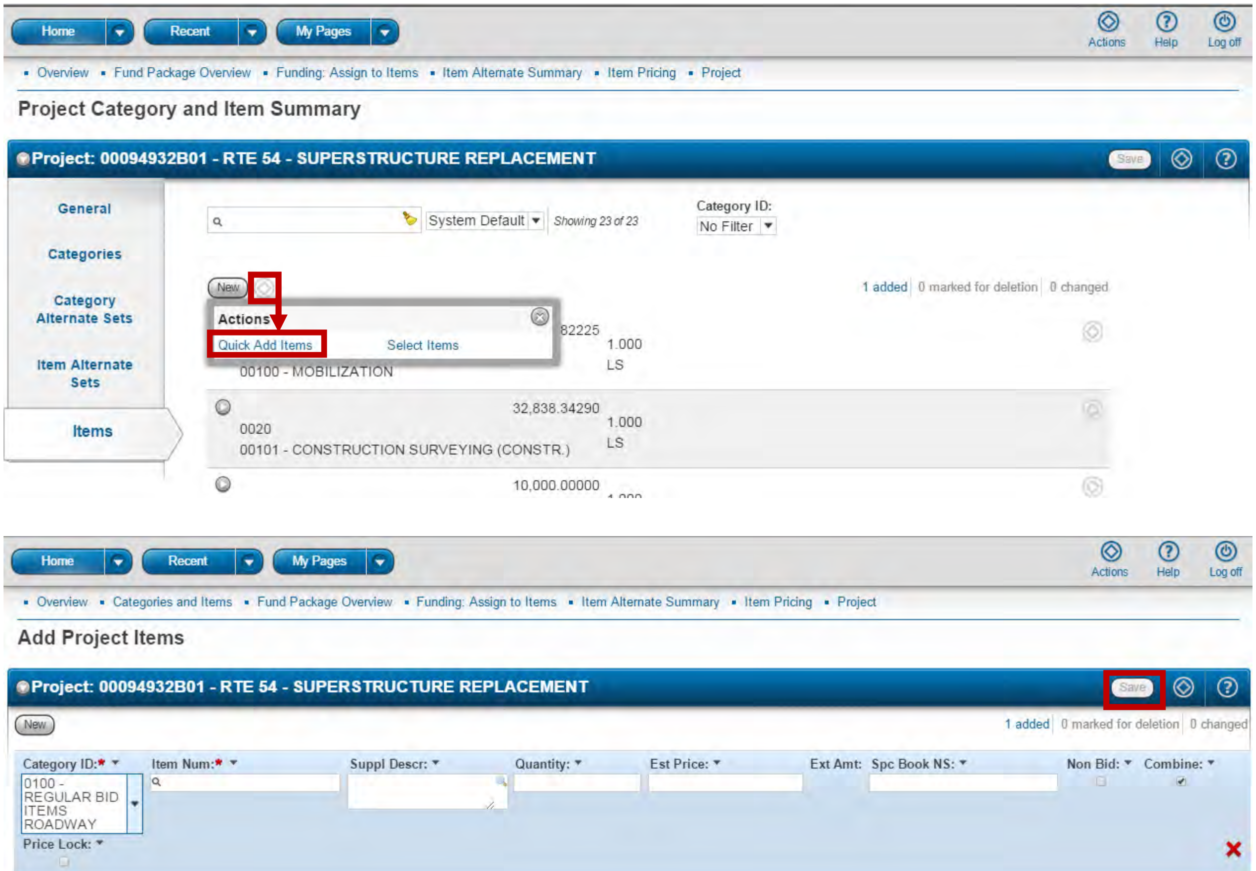


Figure 4 – Quick Add Item Screen

5.1.3 Adding Items with Select Items

From the Project Category and Item Summary, click the action's button and select **Select Items**. This will bring you to the Select items screen. Search for the items you want to add. Once you have found the item click the item in the list. Notice that the item will highlight in light blue and have a green check mark beside it. Select **Add to Project** to add the item to the project. You will then have to find the item in the items list to add the other fields to that item.

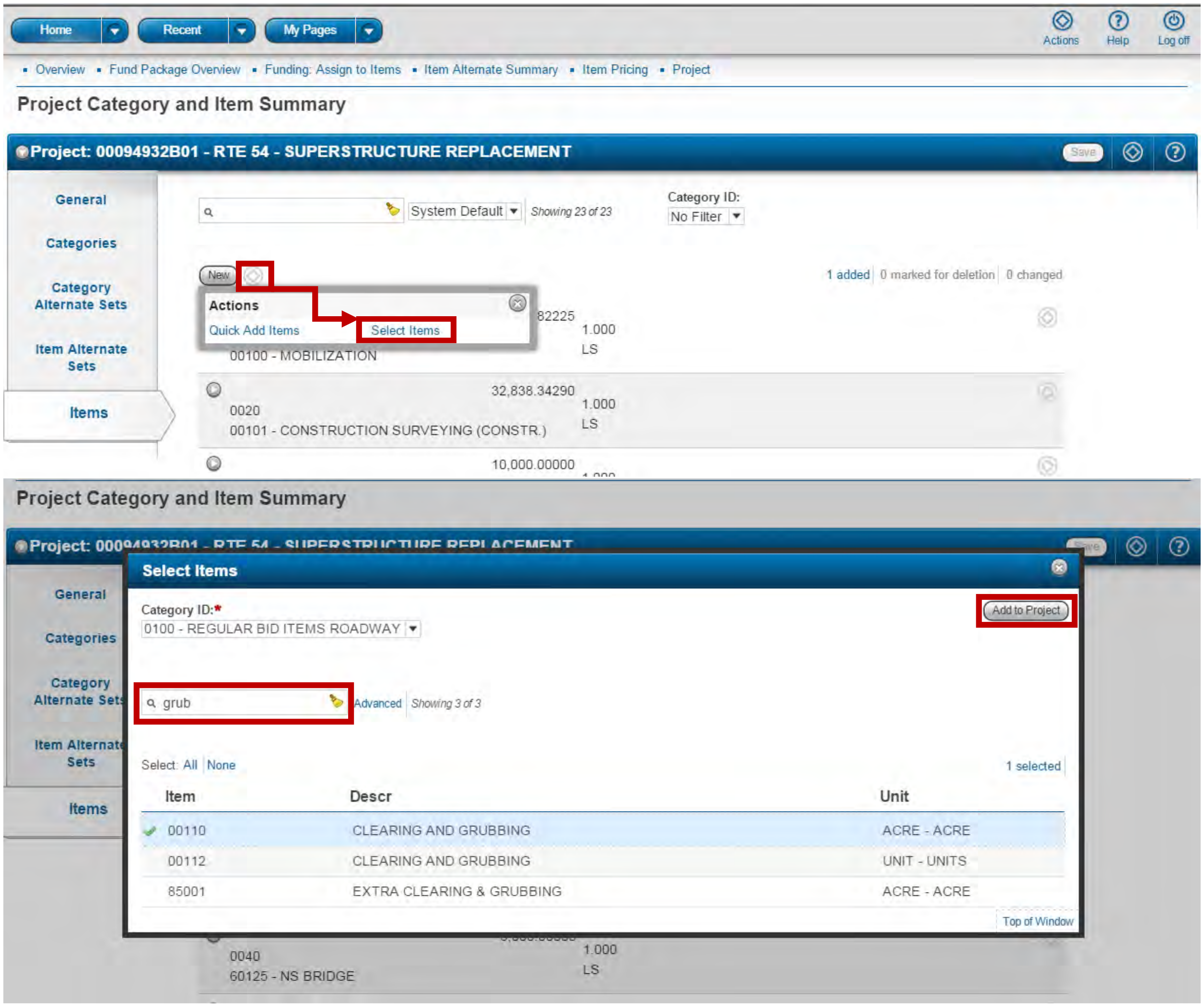


Figure 5 – Select Item Screen

5.2 Deleting an Item

From the Project Category and Item Summary, find the item you want to delete. Select the row actions button for that item and then select **Delete** from the list of actions.

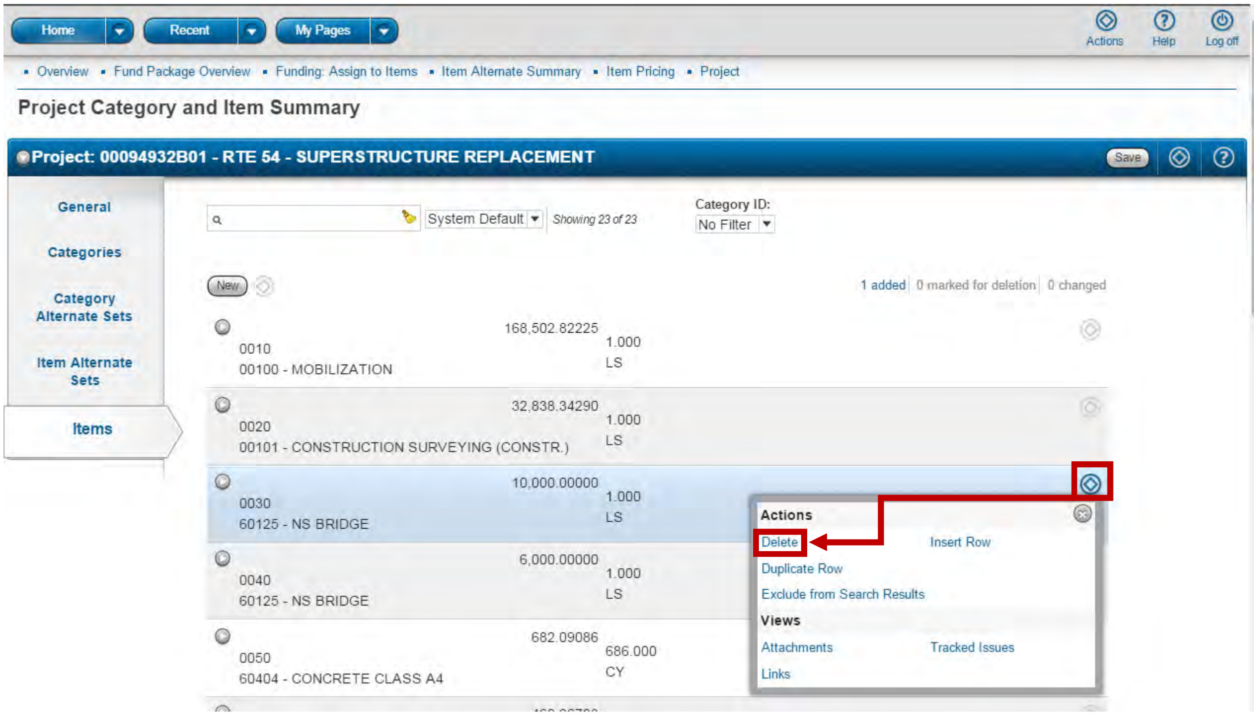


Figure 6 – Delete Item Screen

5.3 Determining Construction Surveying Prices, Mobilization, Construction Engineering (CEI), Contingency and Contract Requirement costs

Two items shall be entered on **every** Location & Design and Structure & Bridge Trnsport estimate.

Construction Surveying (Calculate first) – Item Code 00101

Mobilization (calculation includes Construction Surveying cost) – Item Code 00100

It is recommended that these two items be entered, with a quantity of 1 and a value of zero, **at the time the rest of the items are entered**. Then calculate and fill in the cost **after** all other items in the estimate are complete. Recalculation of the Construction Surveying and Mobilization may be required if **project totals change.**

Note: It is important to enter **Ad hoc** at **Source of Price** and check the box for **Estimated Price Lock** field. Failure to change the **Estimated Price Lock** field will allow a price to be generated by Trnsport - a price which is only an average of bid history prices, not the price based on the formula for which VDOT figures Mobilization and Construction Surveying.

5.3.1 Calculating Construction Surveying

All Location & Design and Structure & Bridge projects will contain the pay item Construction Surveying *(Item Code 00101) and should be entered under a Regular Bid Item Category.* The cost is determined by the following:

- Structure and Bridge – **$1,500 per span**

- Location and Design – **1% of the total project cost,** If there is a Traffic component on the project, calculate 1% of the sum of the "C" (road design) and the "T"(traffic) projects **– Add $1,000 for each "D" number.**

- Traffic Engineering – Construction Surveying costs for Traffic engineering projects are calculated and included in the L&D road design estimate.

5.3.2 Calculating Mobilization

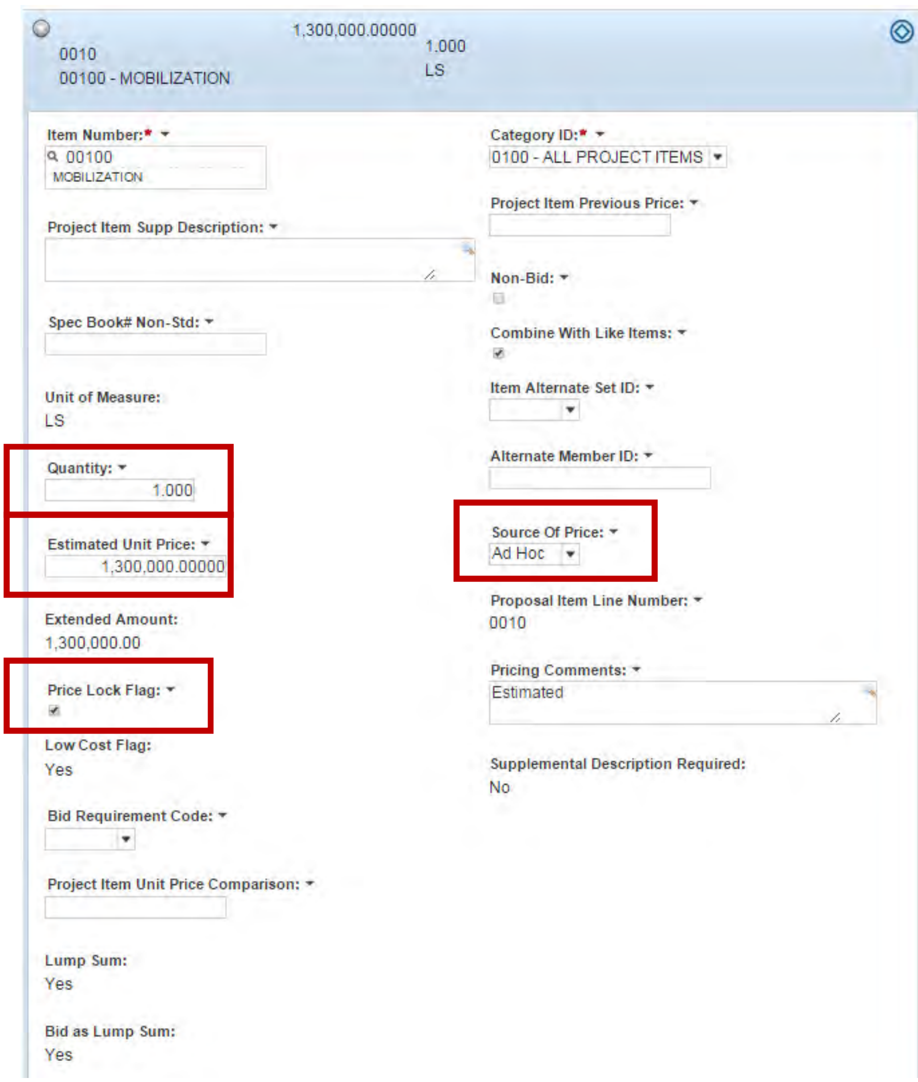
All Location & Design projects and all Structure & Bridge projects shall contain the pay item Mobilization *(Item Code 00100) and should be entered under a Regular Bid Item category*.

The mobilization calculation includes the cost of Construction Surveying. Traffic engineering projects which are a part of an L&D project will not include Mobilization. The road designers will calculate their Mobilization based upon the sum of the "C" (road design) and "T" (traffic) projects.

FORMULA FOR MOBILIZATION

Project Cost More than	To and Including	Limit
$ -	$ 200,000.00	10% of Contract
$ 200,000.00	$ 1,000,000.00	$20,000 *plus* 7.5% of Total Contract *minus* $200,000
$ 1,000,000.00	OVER	$80,000 *plus* 5% of Total Contract *minus* $1,000,000

Item Code 00100 has a Lump Sum unit of measure and so the Quantity should always be 1. Note: It is important to enter **Ad hoc** at **Source of Price** and check the box for **Estimated Price Lock** field. Failure to change the **Estimated Price Lock** field will allow a price to be generated by Trnsport - a price which is only an average of bid history prices which will overwrite the price you entered.



Mobilization Work Sheet

CONTRACT AMOUNT UNDER $200,000

Line 1. Contract Amount = ...$ _______________

Line 2. Line 1 x 0.10 = Mobilization ....$ _______________

CONTRACT AMOUNT OVER $200,000 BUT UNDER $1,000,000

Line 1. Contract Amount = ...$ _______________

Line 2. Line 1 - $200,000 = ...$ _______________

Line 3. Line 2 x 0.075 = ...$ _______________

Line 4. Line 3 + $20,000 = Mobilization ....$ _______________

CONTRACT AMOUNT OVER $1,000,000

Line 1. Contract Amount = ...$ _______________

Line 2. Line 1 - $1,000,000 = ...$ _______________

Line 3. Line 2 x 0.05 = ...$ _______________

Line 4. Line 3 + $80,000 = Mobilization ....$ _______________

5.3.3 Calculating Construction Engineering and Inspection (CEI)

The Construction Engineering and Inspection cover a range of costs and the Project Manager is ultimately responsible for developing and managing the construction engineering and inspection budget but the District Construction or Maintenance Staff can also provide the appropriate amount.

The Construction Engineering and Inspection (CEI) cost can be entered in Trnsport in one of two ways:

1. As a percentage in the **Construction Eng PCT** field on the Category screen (Entered **Only on Categories 0001 through 1999**) (less common method) See 5.3.3.1 for details.

OR

2. As a Lump Sum (most common method) See 5.3.3.2 for details.

5.3.3.1 Entering a Construction Engineering (CEI) Percentage (less common method)

If you choose to determine the Construction Engineering (CEI) by a percentage the table below should be used. Note: This calculation shall **not include the Construction Surveying or Mobilization costs.**

The Construction Eng Percent field is located in two places in Trnsport.

1. Project General tab
2. **Each** Category tab.

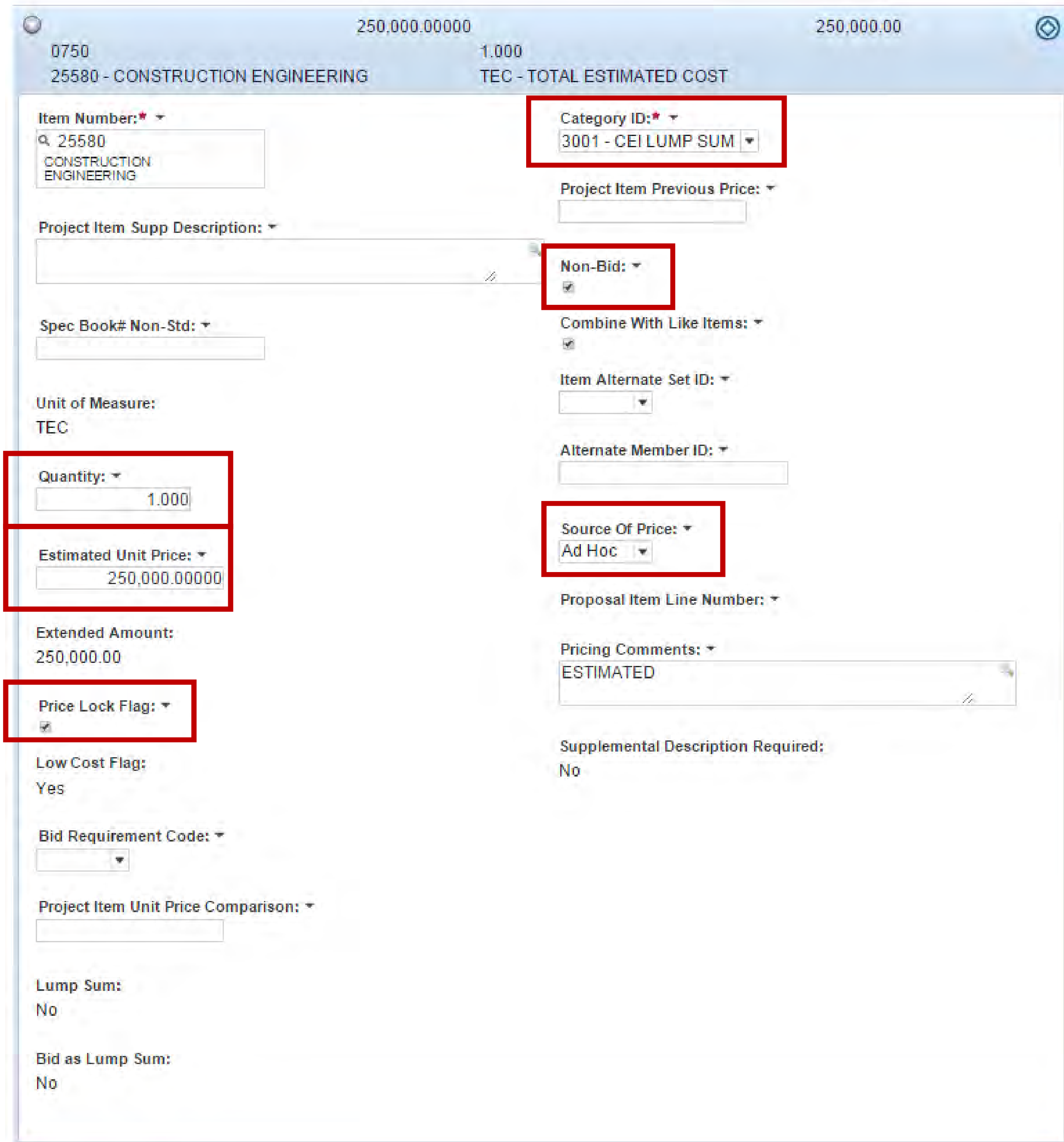
Percentages entered at the Category will override the General tab. It is recommended that you enter the same number in all locations.

Note: If you choose to add the costs of Construction Engineering (CEI) as a lump sum, enter **0.0** in the Const Eng Pct field in all locations.

Contract Dollar Value in Millions	Construction Engineering %
$0 - $1	17.50%
Over $1 up to $1	17%
Over $2 up to $3	16.50%
Over $3 up to $4	16%
Over $4 up to $5	15.50%
Over $5 up to $6	15.00%
Over $6 up to $7	14.50%
Over $7 up to $8	14.00%
Over $8 up to $9	13.50%
Over $9 up to $10	13.25%
Over $10 up to $11	13.00%
Over $11 up to $12	12.75%
Over $12	12.50%

5.3.3.2 Entering Construction Engineering (CEI) Lump Sum (most common method)

Lump Sum Construction Engineering (CEI) uses **Item Code 25580** and must be entered under it's own **category 3001**, see Chapter 4 for complete details. Item 25580 has a TEC (Total Engineering Cost) unit of measure and the quantity should always be 1.



Note: It is important to enter **Ad hoc** at **Source of Price** and check the box for **Estimated Price Lock** field. Failure to change the **Estimated Price Lock** field will allow a price to be generated by Trnsport - a price which is only an average of bid history prices which will overwrite your unit price.

5.4 Contingency (Non-Bid Cost)

The Contingency cost on construction and maintenance contracts is used to capture the potential cost of additional work, unforeseen conditions such as differing site conditions, plan changes etc. **Contingency is a Non-Bid cost and is only calculated for Regular Bid Items (Categories 0001 through 1999)**. The following items need to be accounted for in your contingency budget for both construction and maintenance contracts including schedule work:

- Fuel Adjustment
- Asphalt Price Adjustment
- Steel Adjustment
- Ride ability

Contingency costs are based on L&D's IIM-LD-249 2-Tiered Approach to Project Oversight:

1. Tier I = **5.0** percent

OR

2. Tier II = **10.0** percent

If there is more than one federal project number, the contingency cost should be allocated to each federal project. The cost may be divided among other Trnsport Project ID's, if the Project Manager desires but **if using contingency percentages they must match in all Trnsport estimates.**

The Contingency cost can be entered in Trnsport in one of two ways:

1. As a percentage in the Contingency PCT field on the Category screen (less common method) (Entered **Only on Categories 0001 through 1999)** See 5.3.1 for details.

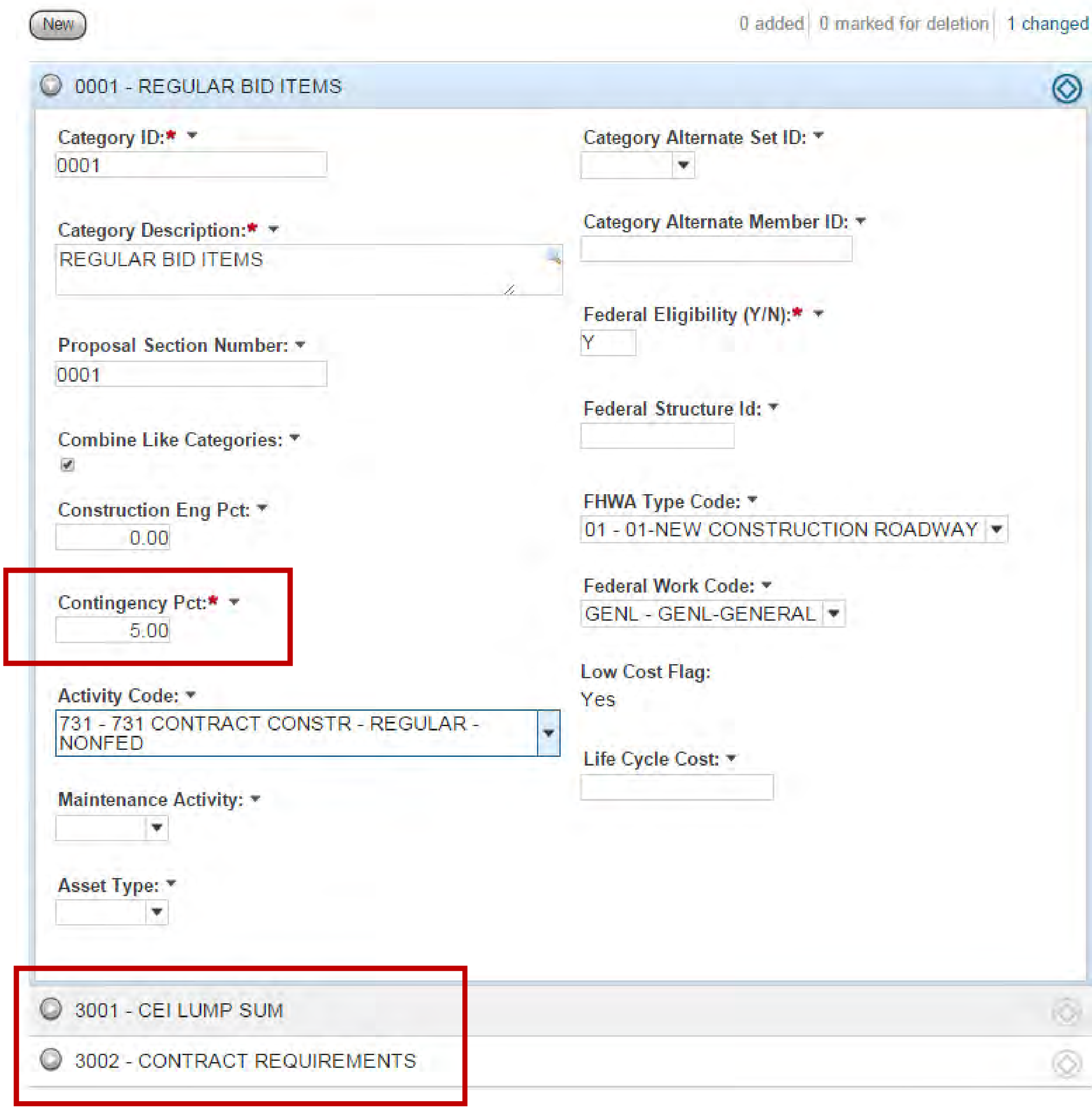
OR

2. As a Lump Sum (most common method) See 5.3.2 for details

5.4.1 Entering Contingency as a Percentage

Enter **5.0** or **10.0** in the **Contingency Pct** field under the Regular Category only.
Important note: Contingency percentages should only be entered on Categories 0001 through 1999. See Chapter 4 for details.

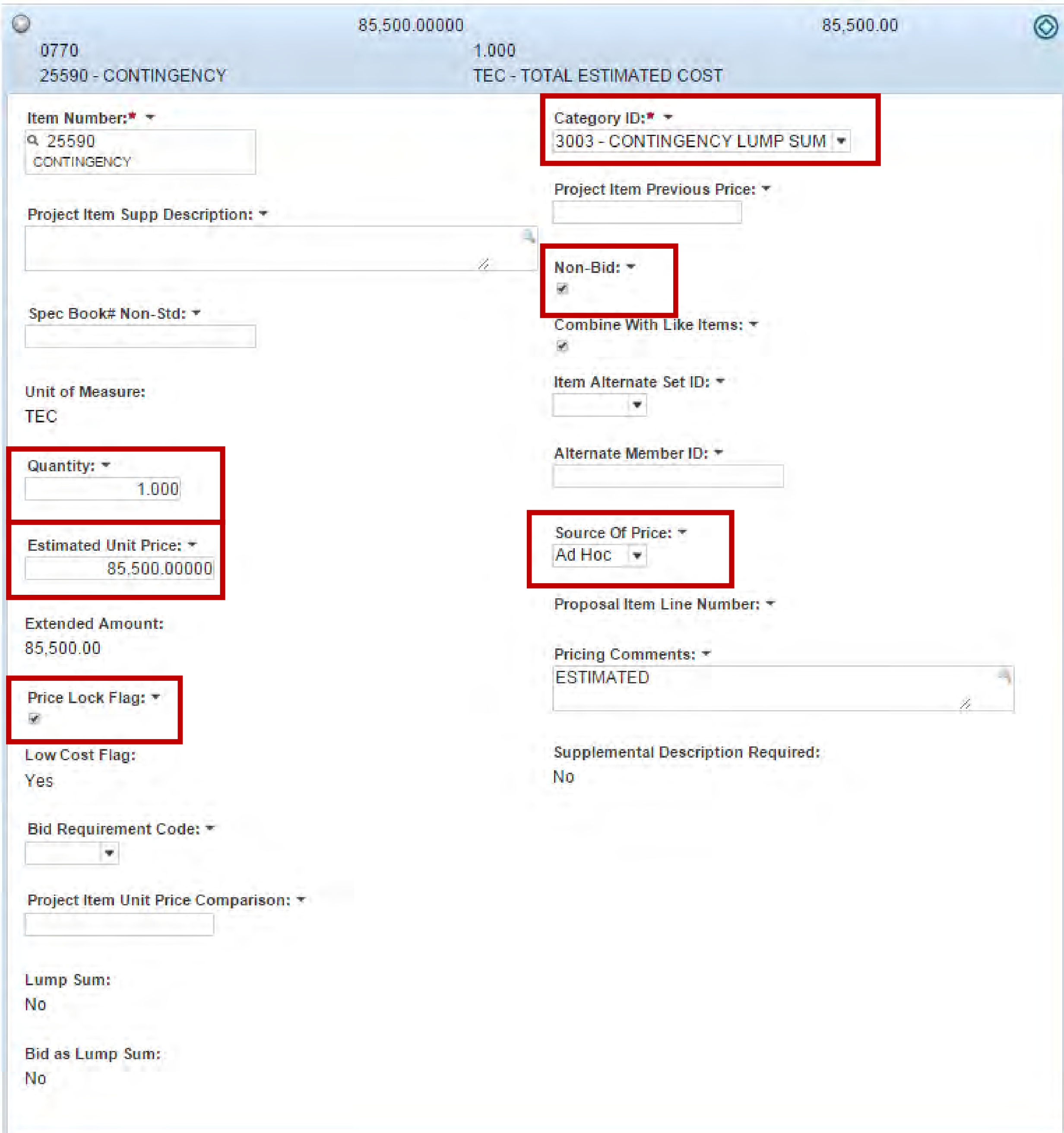
Note to Project Managers: The Contingency percentage must match across all projects in the Prime and/or Proposal.



Be sure that Categories 3001 and 3002 have 0.0 in the Contingency field.

5.4.2 Entering Contingency as a Lump Sum

Lump Sum Contingency uses **Item Code 25590** and must be entered under it's own **category 3003**, see Chapter 4 for complete details. Item 25590 has a TEC (Total Engineering Cost) unit of measure and the quantity should always be 1.

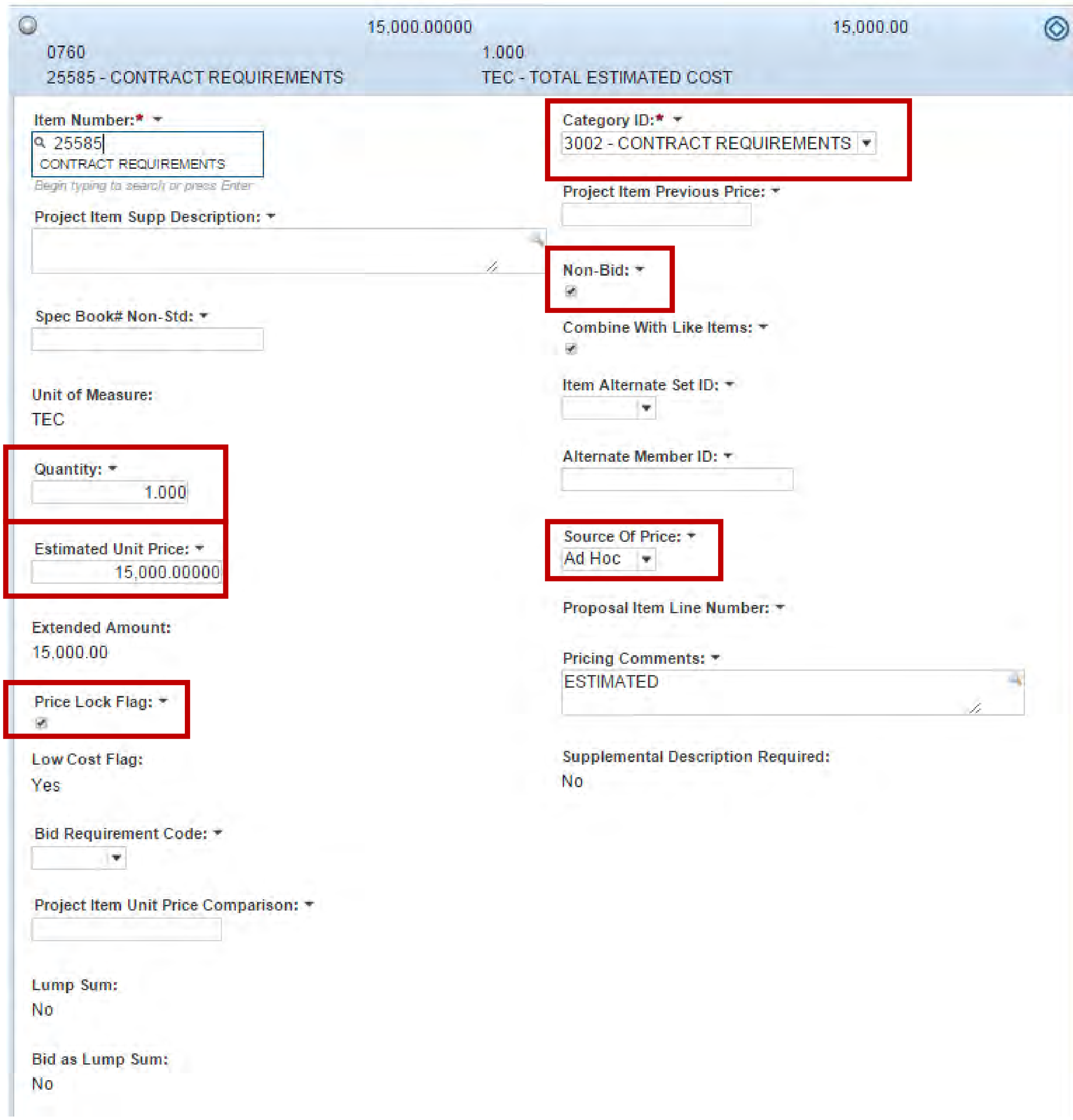


Note: It is important to enter **Ad hoc** at **Source of Price** and check the box for **Estimated Price Lock** field. Failure to change the **Estimated Price Lock** field will allow a price to be generated by Trnsport - a price which is only an average of bid history prices which will overwrite your unit price.

5.5 Contract Requirements (Non-Bid Costs)

The Contract Requirements item was established to capture potential project Incentives/Disincentives (I/D) payments. Users may utilize HUB-CAP or other methods to determine the Maximum cost.

Contract Requirements uses **Item Code 25585** and must be entered under it's own **category 3002**, see Chapter 4 for complete details. Item 25585 has a TEC (Total Engineering Cost) unit of measure and the quantity should always be 1.



Note: It is important to enter **Ad hoc** at **Source of Price** and check the box for **Estimated Price Lock** field. Failure to change the **Estimated Price Lock** field will allow a price to be generated by Trnsport - a price which is only an average of bid history prices which will overwrite your unit price.

6. FUND PACKAGES & FUNDING ITEMS

A *fund package* is used to group multiple funding sources for one or more project items and to define that grouping with a name.

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.

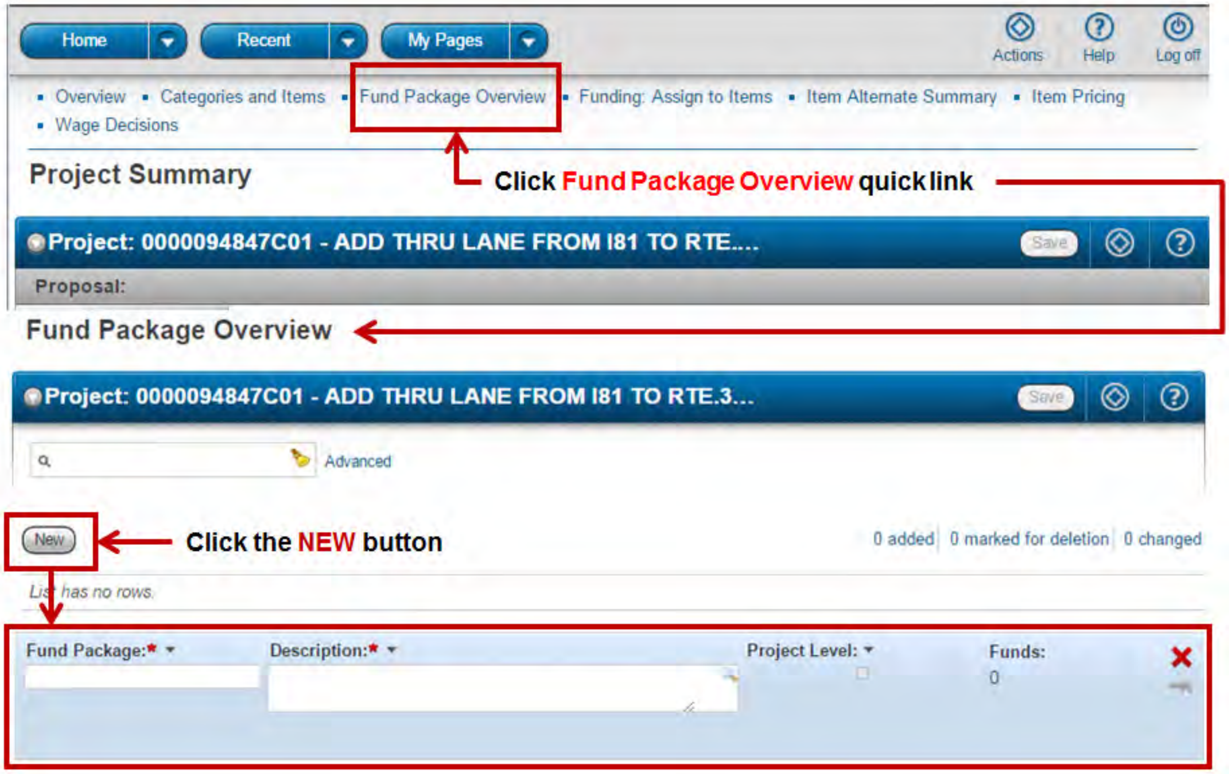
Trns·port allows for multiple funding sources, but **each funding package must add up to 100 percent.**

- A category could have simple funding where 100 percent of the funding is from one source, such as AF01- 100% Federal Participation.
- On the other hand, the funding could be more complex with the federal government funding 50 percent of the project, the state funding 30 percent, and a local agency funding the remaining 20 percent.

For the majority of VDOT Projects, only One Fund Package is necessary, as funding is typically the same for the entirety of a project.

6.1 Add a Fund Package

The following describes the steps to add a Fund Package to a project.



To **add a Fund Package** to the Project, click the **Fund Package Overview** quick link.

- The Fund Package Overview screen opens.
- Click the **New** button.
- The system creates a new row.

At the new Fund Package row, enter the following information: Examples are provided on the next page.

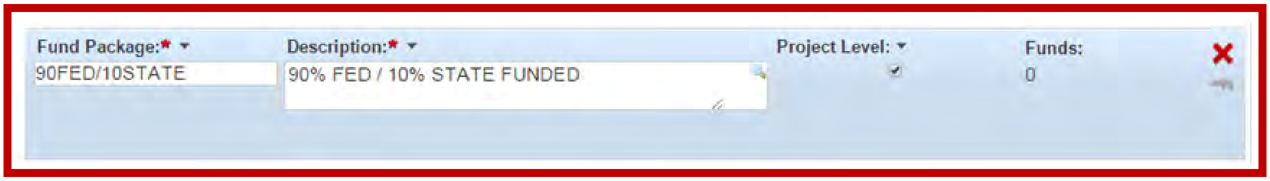
> **Fund Package** – This is the Name of the Fund package. This field appears on the Funding Summary portion of the Preliminary Detail Estimate report.
>
> **Description** – Describe how the Funding will be divided.
>
> **Project Level** – <u>Always check this box</u> (this provides funding for SiteManager)

- Click the **Save** button on the Fund Package Overview component bar.

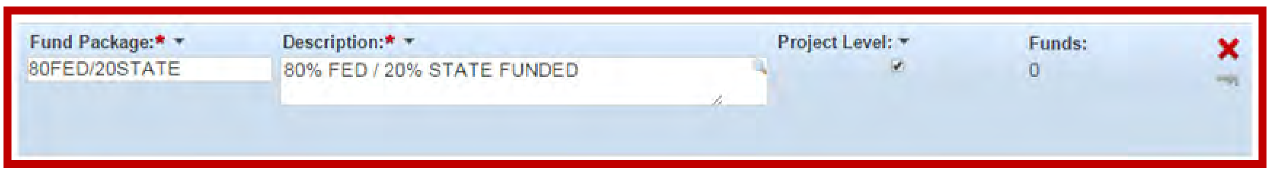
6.1.1 Examples of Fund Package Names

The following are some of the most typical fund packages

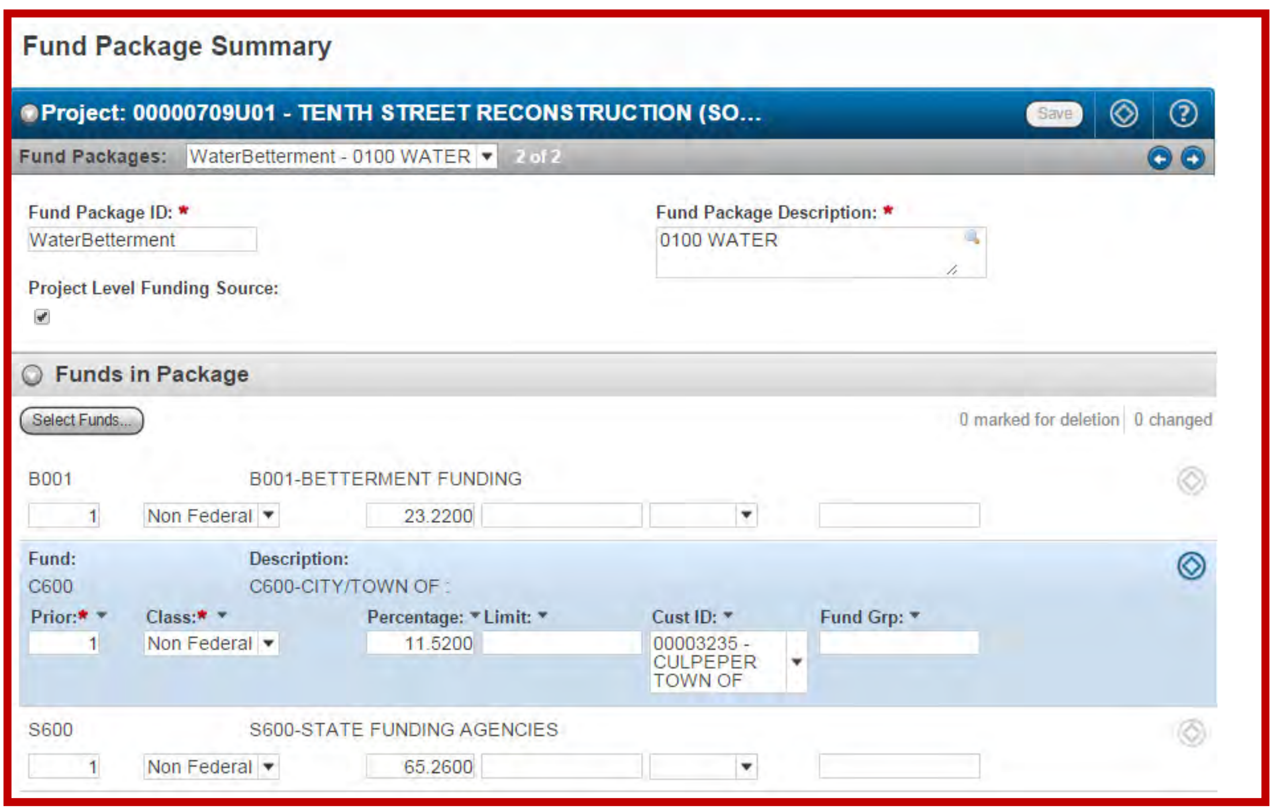
100% State Funded



90% Federal Funds / 10% State Funds



80% Federal Funds / 20% State Funds



Funding for this project is split between State, City & a Local Municipality

6.1.2 Duplicating a Fund Package

Click on the **Fund Package row Action Menu** for the **specified Fund Package** and click on **Duplicate Row.**

- The Fund Package row gets **duplicated** below the original row.
- **Update the duplicated row's information** with the information for the following fields:

  Fund Package – Enter a Unique Name

  Description – Describe how the Funding will be divided

  Project Level – Always check this box (this provides funding for SiteManager)

- Click the **Save button** on the Fund Package Overview component bar.
  - The new row gets **added as a row** in the list of Fund Packages.

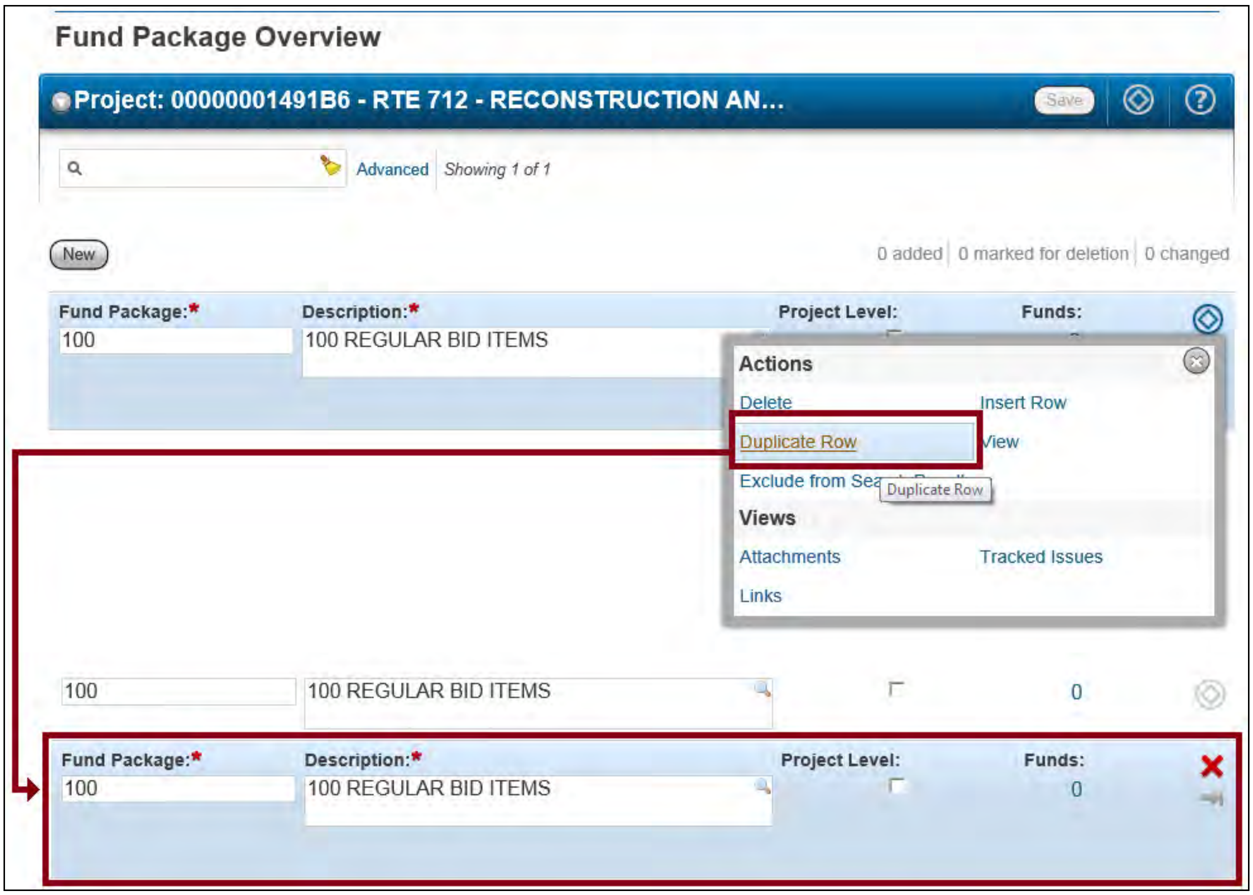


Figure 1 - Duplicating a Project's Fund Package Row

6.1.3 Inserting a Fund Package Row

Click on the **Fund Package row Action Menu** for the **specified Fund Package** and click on **Insert Row.**

- The Fund Package row gets **inserted above** the original row.
- **Update the inserted row's information** for the following fields:

  Fund Package – Enter a Unique Name

  Description – Describe how the Funding will be divided

  Project Level – Always check this box (this provides funding for SiteManager)

- Click the **Save button** on the Fund Package Overview component bar.
  - The new row gets **added as a row** in the list of Fund Packages.

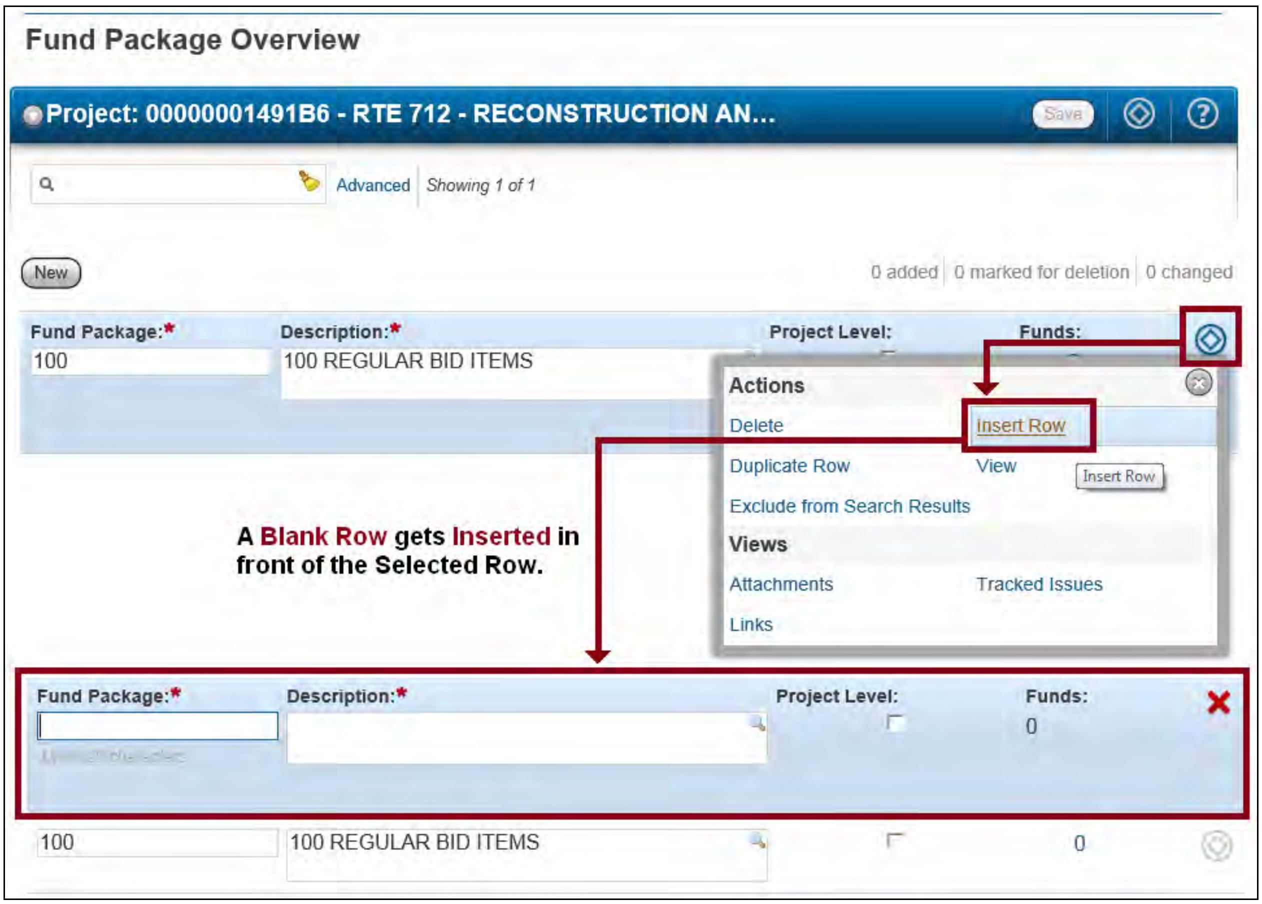


Figure 2 - Inserting a Project's Fund Package Row

6.1.4 Deleting a Fund Package

To **delete a Fund Package**, select **Delete** from the **Actions menu on the Fund Package's row:**

- The system **shades the row gray** to indicate it is **marked for deletion.**
- To **reverse the delete** action, click the **Undo button.**
- Click the **Save button** on the Fund Package Overview screen's header.
    - The deleted row gets **removed** from the list of Fund Packages.

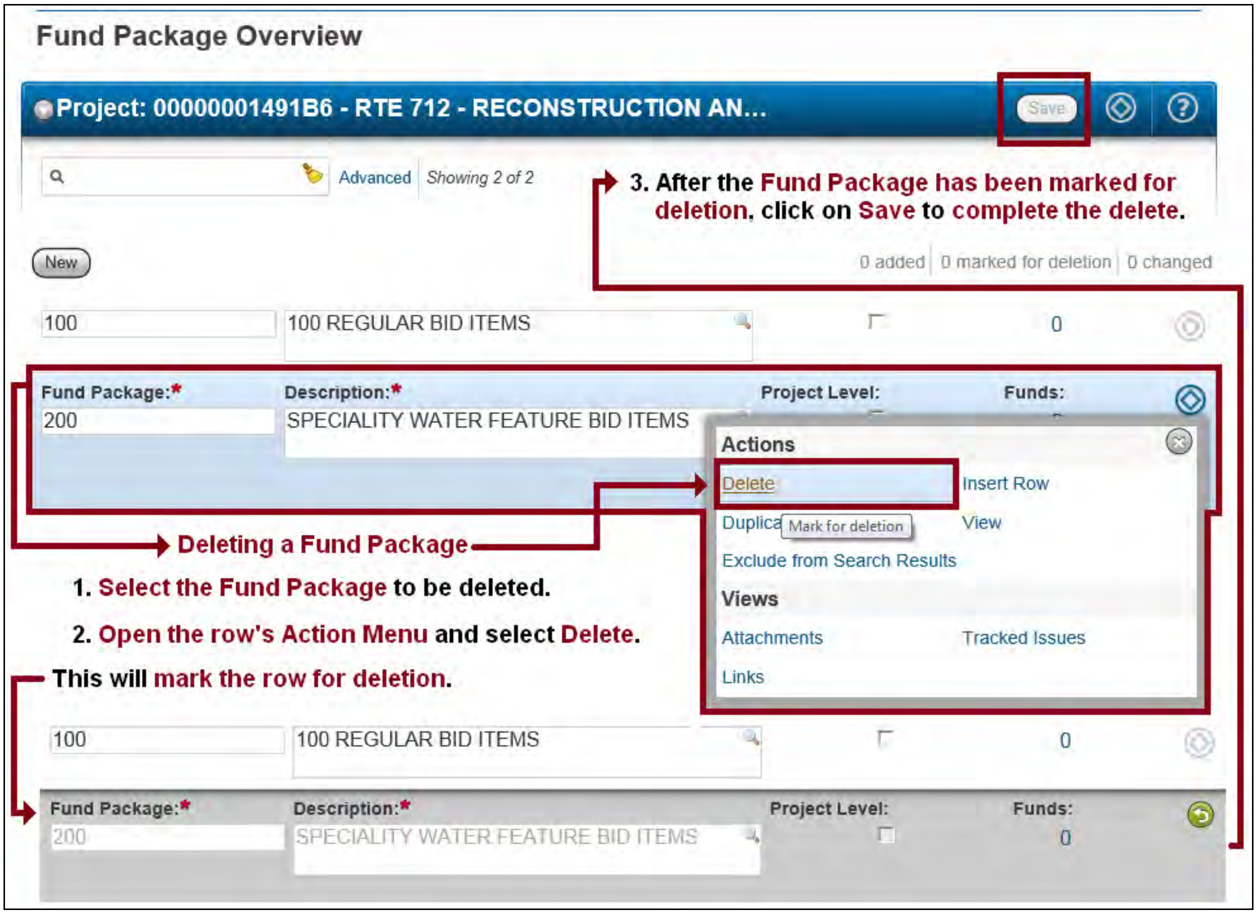


Figure 3 – Deleting a Project's Fund Package

6.1.5 Adding Fund Specifics to a Fund Package

Once the Fund Package has been created, the next step is to Select the **funding specifics** for the Fund Package.

1. Click the **0** under Funds **OR** Select the Action button on the Fund Package Row and select **View.**
2. Click the **Select Funds** button. A model window opens to select from the Fund table.
   Note: For ALL Federal funds, use AF01 and change the percentage as needed.
   If you know the funding you need, enter it in the search box in the model window.
3. Otherwise, select **Show first 10.**
4. Select from the list, which places a green check box to the left of the name. Select the **Add Fund to Fund Package** button at the top of the model window.
   Note: More than one selection can be made before adding to the Fund package. This is described in Figure 6.
5. In the **Prior** field, enter 1. *This should always be 1.*
6. Adjust Participation percentages if necessary. *Note: the total Participation must equal 100.*
7. The Customer ID for AF01 must be filled in with 55002 – FHWA to ensure proper reporting to the Fiscal division, for all other funds the Customer ID may be left blank.
8. Select the check box under the **Project Level Funding Source**. *This should always be chosen* so that the funding passes to the SiteManager software correctly.
9. Click the **Save** button on the component bar.
10. Select the **Fund Package Overview** quick link. Note: that the number under the **Funds** has changed to reflect the number of fund specifics that was added in the previous steps.

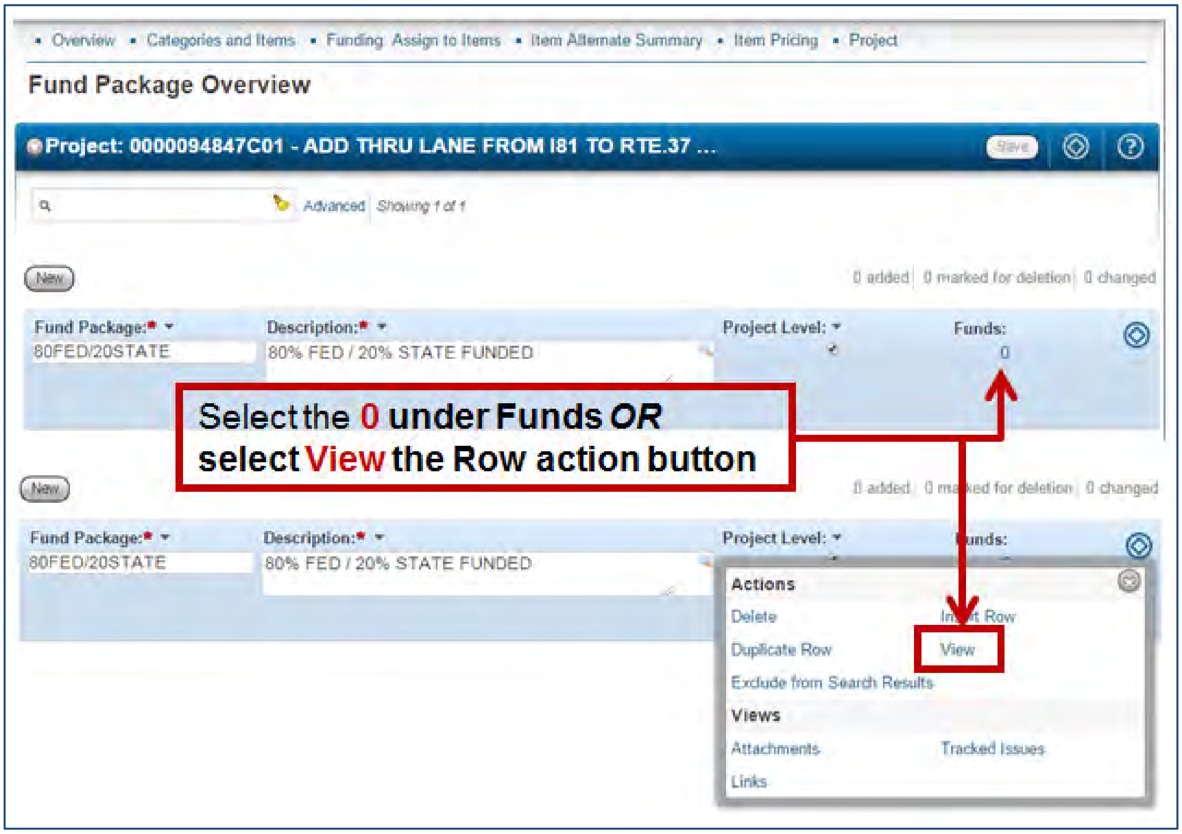


Figure 4 – 2 ways to choose Fund specifics

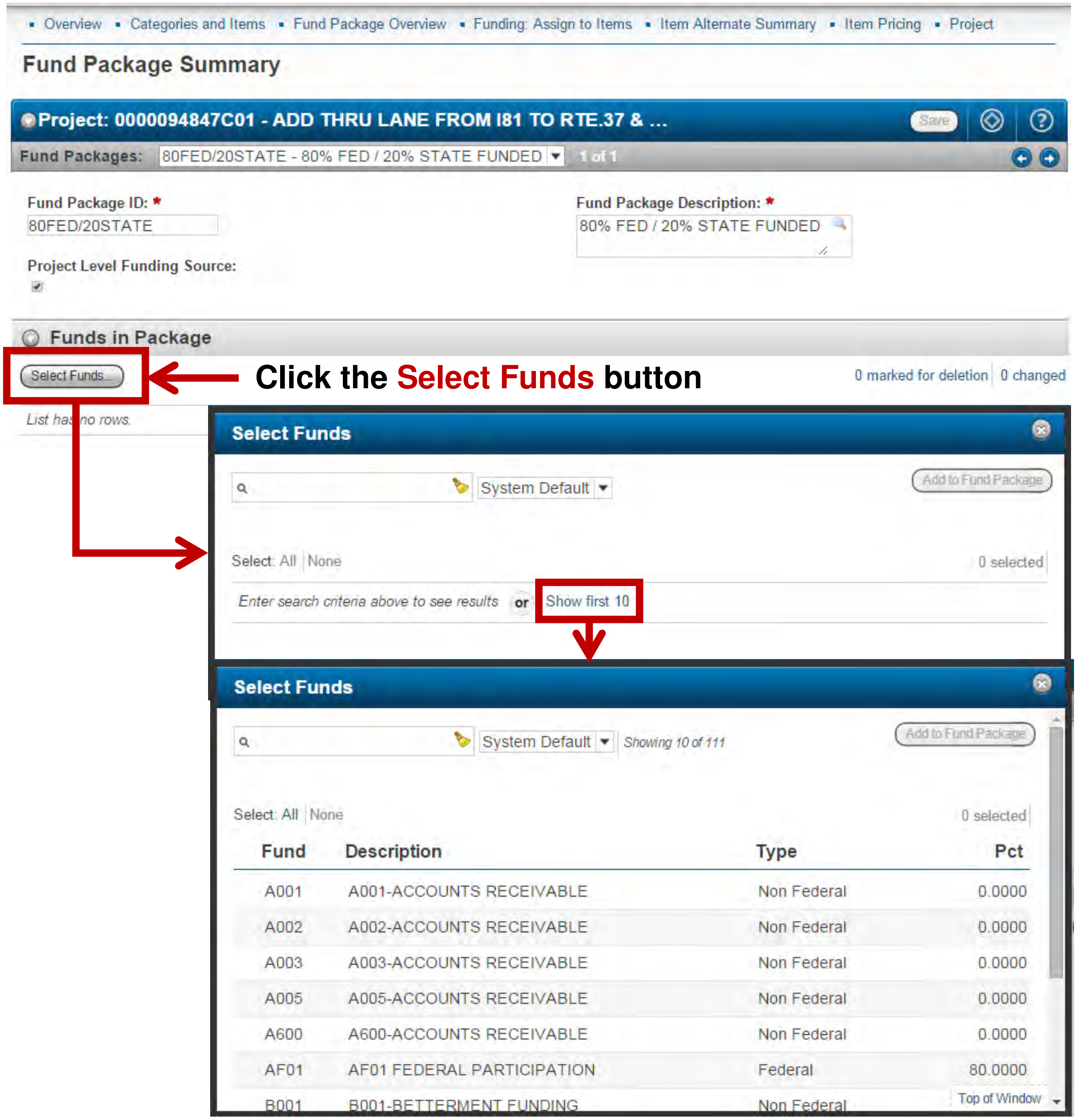


Figure 5 – Select Fund Model window

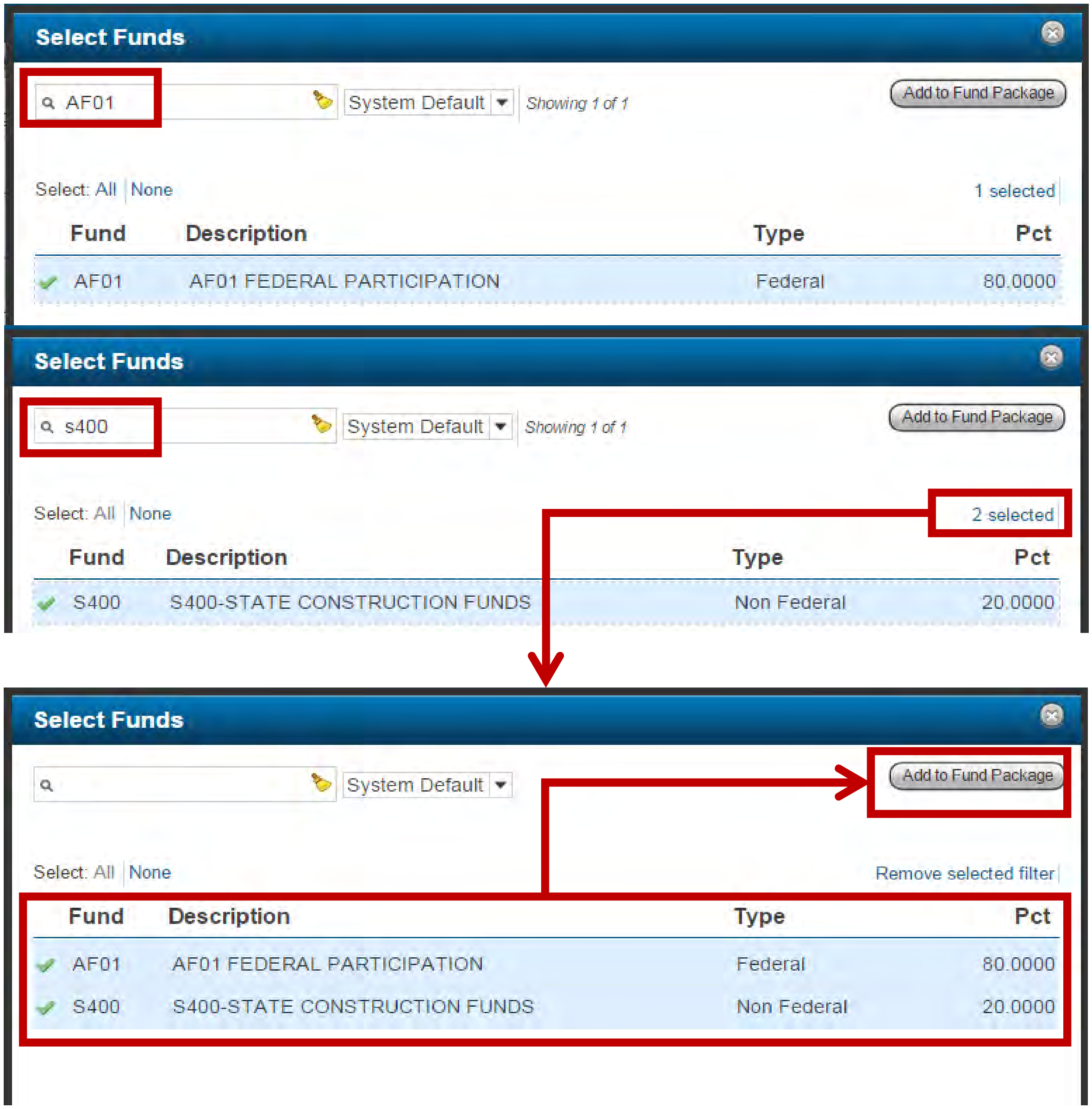


Figure 6 – Selecting more than one Fund at a time

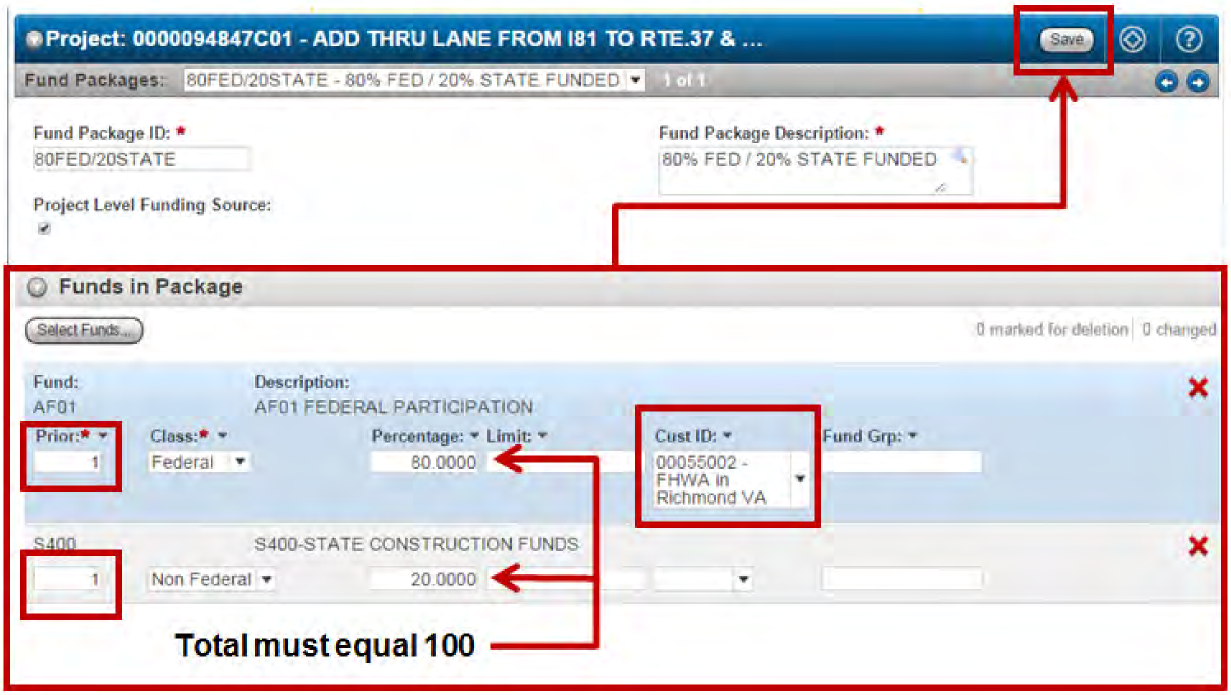


Figure 7 – Complete Fund fields

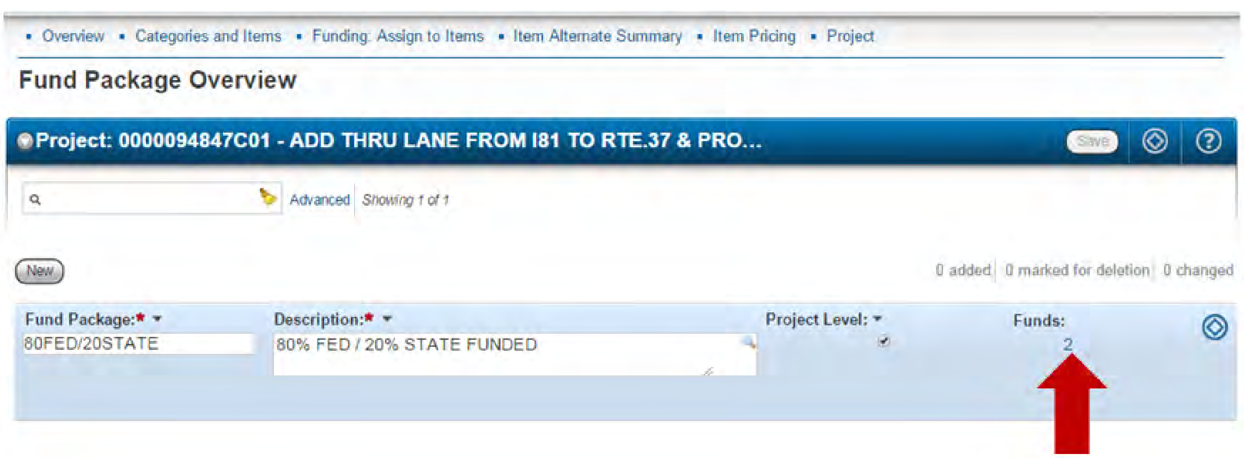


Figure 8 – Fund package shows 2 Fund Specifics

6.2 Assign Funding to a Project

You can assign fund packages to items individually or to save time, you can assign a fund package to all the items in a category or to all the items in the project at once. Each item in a project must have one (and only one) fund package assigned to it. A Category, however, does not require a Funding assignment.

Tip: Perform this step AFTER all the items have been entered in your estimate.

To open the Funding assignment, select the **Funding: Assign to Items** quick link from within your project.

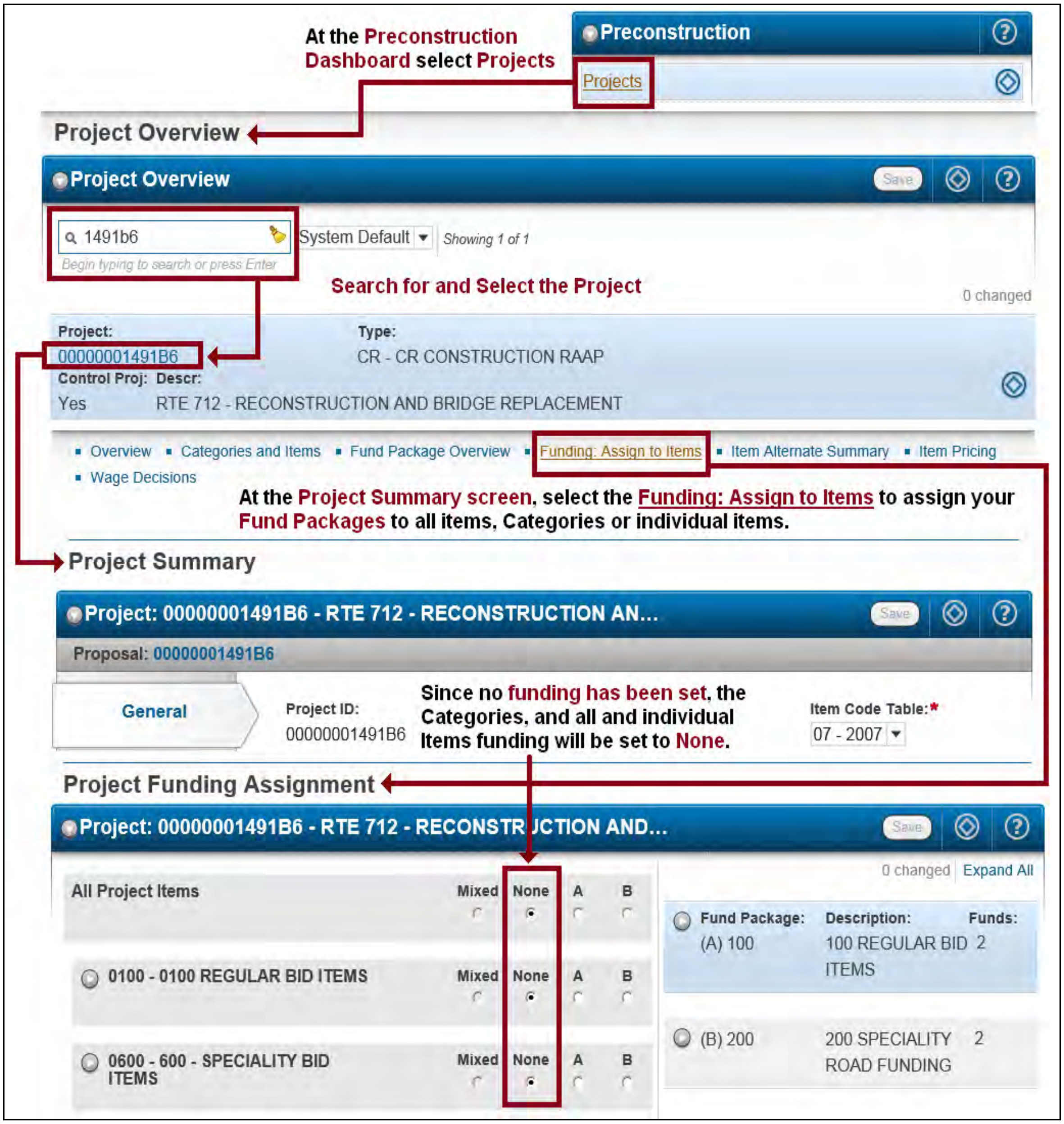


Figure 9 - Opening the Project Funding Assignment Screen

6.2.1 Project Funding Assignment Screen Overview

The screen contains two vertical lists:

1. The **left side of the screen** contains a **list of all the Categories** in each Project.
   - Each **Category row** displays the **Category ID, Category Description, and a number of indicators on the right to denote the fund packages to which the items in the category are assigned.**
   - Each category row can be **expanded** to list all the Items in the Category. Click the **Expand** b**utton** to **display all the Items in the Category.**
   - Each item row contains **indicators on the right to denote the Fund Package** to which the Item is assigned and **current values for the following fields:**

     Project Item Line Number,

     Reference Item ID,

     Unit of Measure,

     Reference Item Description.

Each Category/Item row contains an indicator labeled **Mixed**, an indicator labeled **None**, and a **letter indicator for each fund package in the project.**

For example, if a project contains **three fund packages**, each category and item row would contain these four indicators: **Mixed, None, A, B, and C.**

The system initially selects the **None indicator** for all Categories and Items that have not been assigned to a Fund Package

2. The **right side of the screen** contains a list of all the **Fund Packages** in the Project or Contract.
   - The information in this list is for **reference only** and **cannot be changed.**
   - Each Fund Package displays the **Fund Package ID**, the **Fund Package Description** and a **count of how many funds the Fund Package contains.**
   - **Click on the Expand button in a Fund Package row to expand it** and **view the following information** for each fund in the Fund Package:

     Prior (Priority) – a numeric value that determines the order in which funds in a Fund Package are used when some or all of the funds have limited participation.

     Fund – a unique identifier assigned to each fund in the system.

     Percentage – the percentage of work a particular fund will pay.

     Class – the funding classification for this fund.
   - **Each Fund Package in the list is labeled alphabetically,** beginning with the letter "**A**."
     - These labels correspond to the **indicators** in the **Category/Items list on the left.**

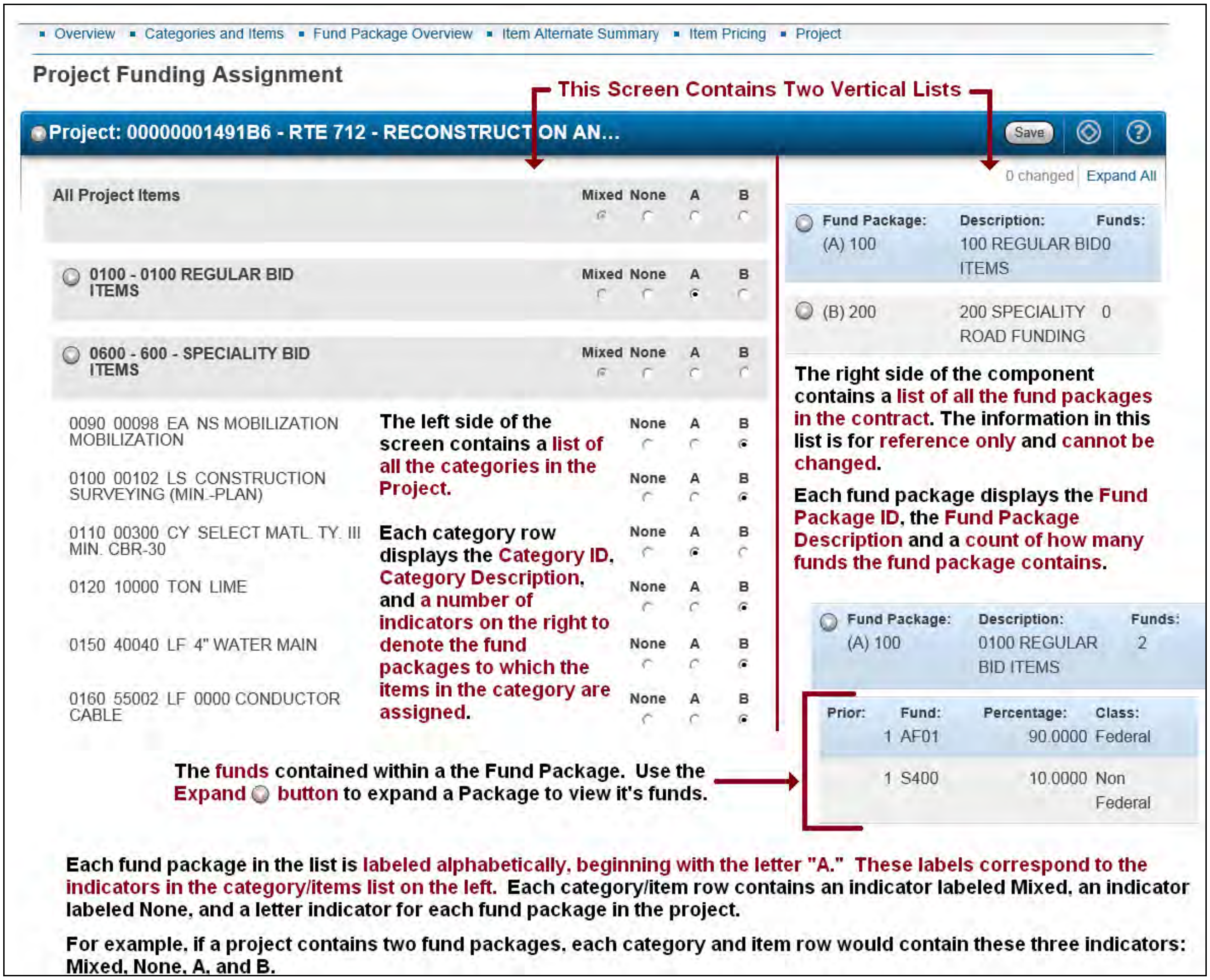


Figure 10 - Project Funding Assignment Overview

6.2.2 Three (3) Methods to Assign Funding

<u>Method 1 (Most Common):</u> Assign the Funding for **all items for the entire project**

In most cases, **only one (1) Fund Package is needed** as funding is typically the same for the entirety of a project.

- On the Project Funding Assignment screen, select the radio button on the **All Projects Items** row to match the correct Fund Package on the right portion of the screen.
- Click the **Save** button.

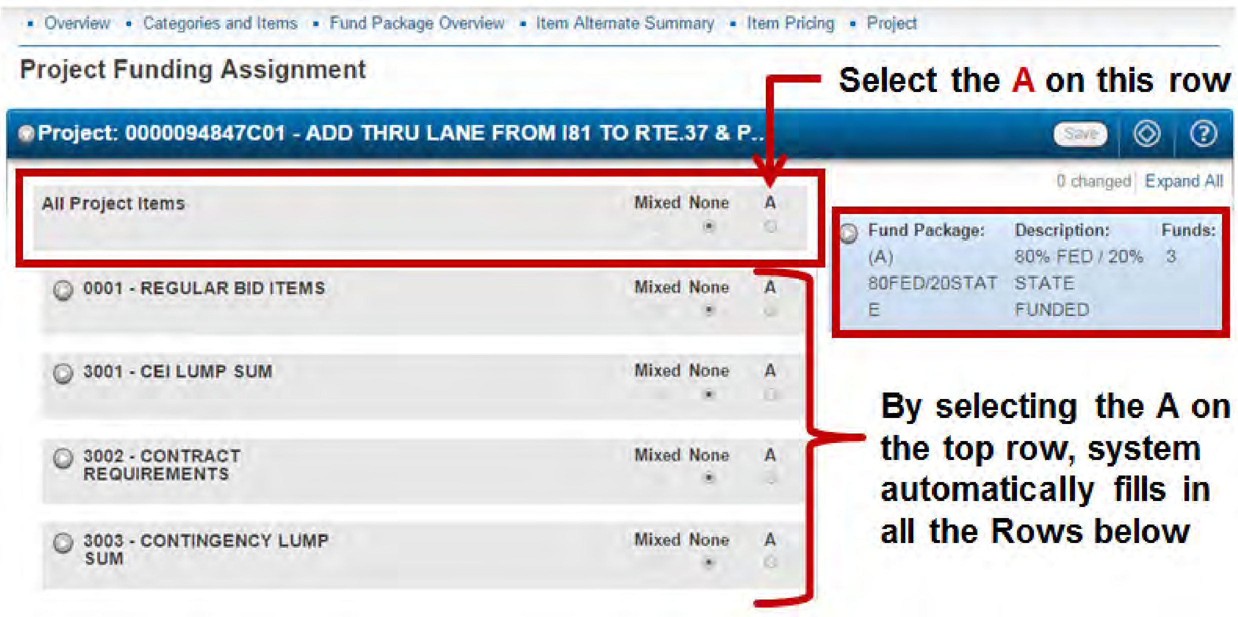


Figure 11 – Assign Funding for the Entire Project

<u>Method 2:</u> Assign the Funding by a **Category**.

This method shall be used for projects that contain more than one Fund Package. One example is betterment projects, whereby a local municipality improves their infrastructure simultaneously with VDOT construction projects.

- Select the Radial button on each Category row that corresponds to the proper Fund Package on the right.
- Click the **Save** button.

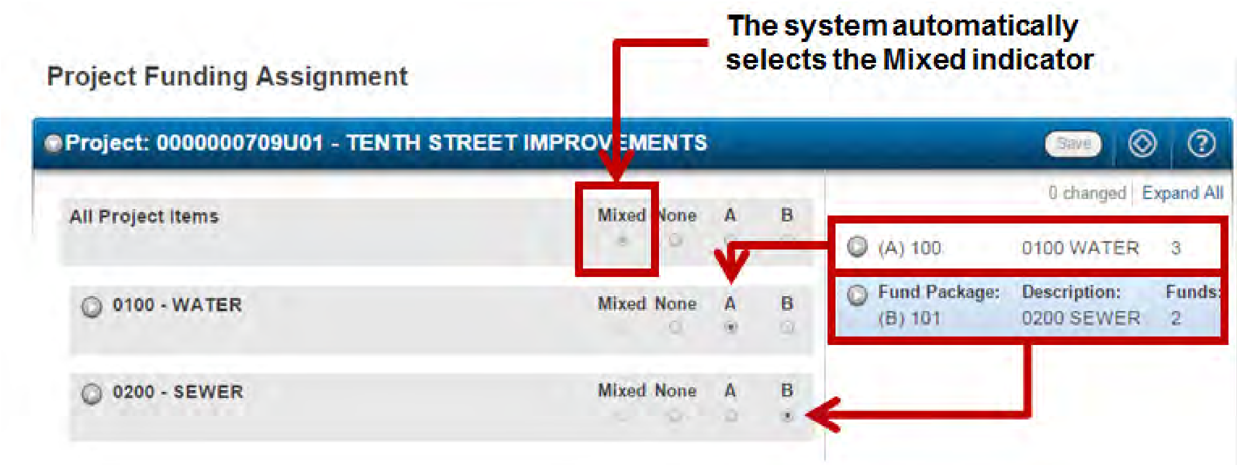


Figure 12 – Assign Funding by Category

<u>Method 3 (Rare Case):</u> Assign the Funding by **Each item individually**.

- On the Project Funding Assignment screen, click the  button next to the appropriate category to expand the list to show the individual items. Select the Radial button for the appropriate category on the item row as necessary.
- Click the **Save** button.

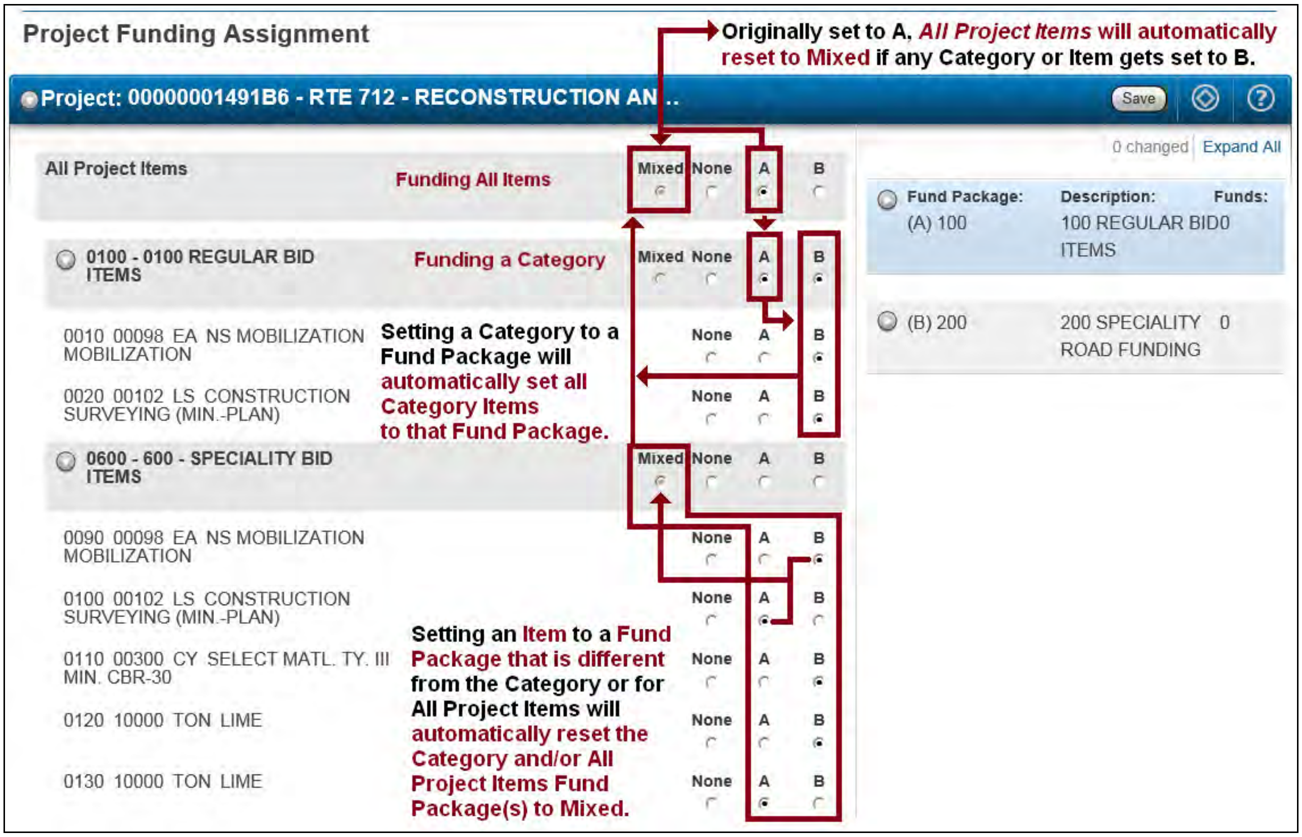


Figure 13 – Assign Funding by individual Items

7. ITEM PRICING

The Price Project Item Overview (Item Pricing quick link) component allows you to change the estimated unit price for any project item. You can change the price of a single item manually, or you can automatically generate a price based on historical bids. Generating the bid-based prices automatically for all the items in the project at once, is recommended.

Generated prices from the 2-year bid history are based on the combination of the following:

1. District (location)
2. Item Code
3. Quantity

There will be instances when generating prices will not produce a price due to the combination of the item code, quantity and location. Trnport will not generate prices for Non-Standard items. Therefore, the engineer/designer will need to determine a logical price and enter it manually.

VDOT employees may utilize the Staunton database to determine prices, found here:

http://501stfs3/main/bridge/inside_vdot/items.asp

In the old Trnsport system the **Date of Gen Bid Base Prices** field populated automatically whenever prices were processed/generated based on the date the user entered. This process is different in the new Web Trnsport, users can now enter the date manually and **should change this field every time they price Items and/or Category Items**. This price is displayed on the cover page of the Preliminary Detail Estimate report.

7.1 Generate Bid-Based Prices for an Entire Estimate

To have Trnsport Generate Prices for an Entire estimate perform the following steps:

1. Click the **Item Pricing** quick link.
2. A new screen opens and the categories in your estimate are listed.
3. Select the **Component Action Button.**
4. Select **Price All Items.**
5. A message will display once the process is complete.
6. Return the General tab and change the **Date of Gen Bid Base Prices** field to the date the prices were generated.

The system updates the value in the Price field and changes the Est Type to either Regression or Average, depending on which estimation model is chosen. The Ext Amount and Project Item Total fields are also automatically updated. If no historical information is available for an item, the system updates the Price field with the reference price and changes the Est Type to Reference. If reference price information is not available, the system leaves the price as it was or blank.

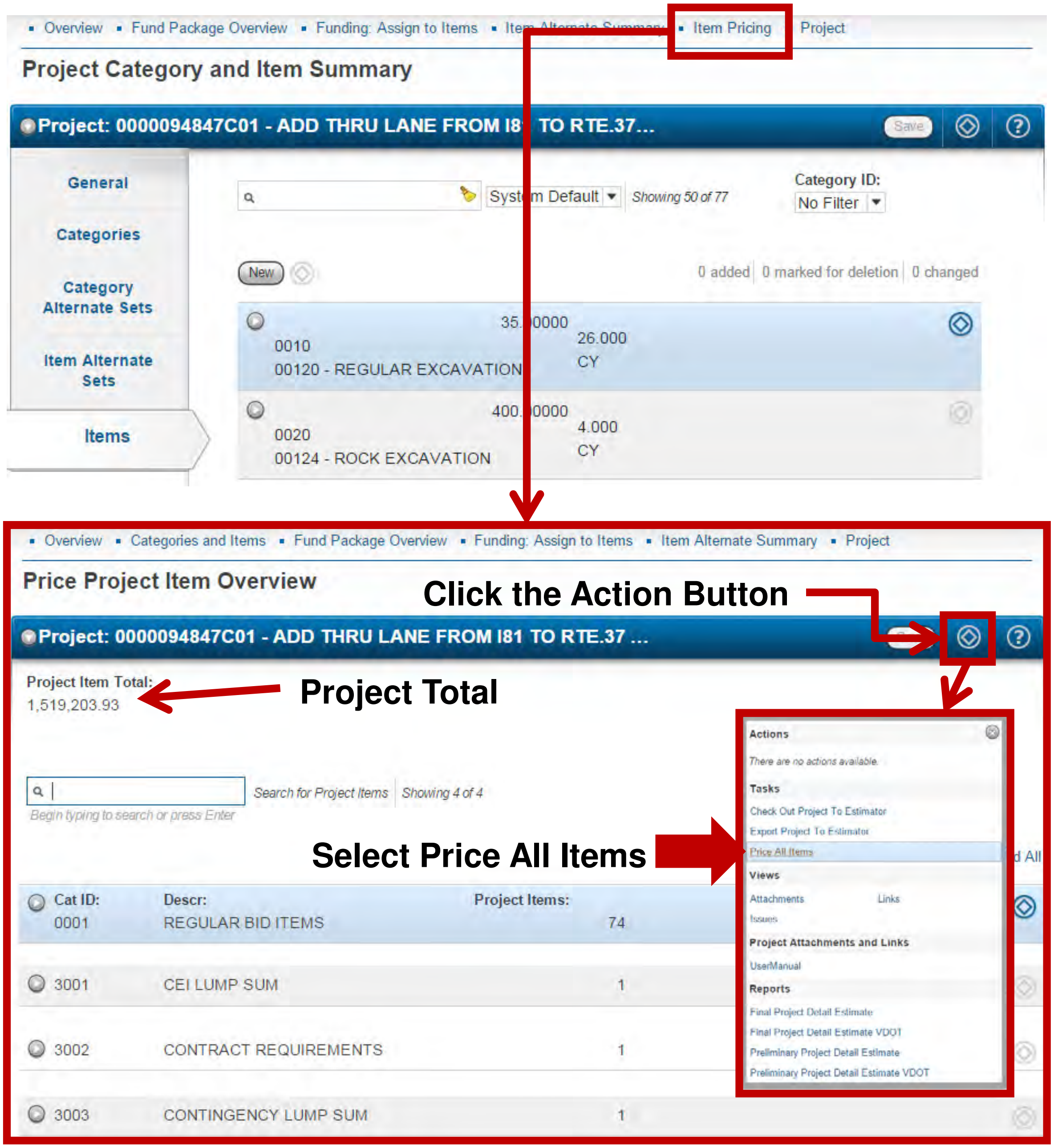


Figure 1 – Generate Bid-Based Prices for entire estimate

7.2 Generate a Price for a Single Item

To have Trnsport generate a historical price for a single item perform the following steps.

1. From within your project select the **Item Pricing** quick link.
2. Expand the **Category** of the item you wish to price.
3. Select the row Action Button on the item you wish to price.
4. Select **Price Item.**
5. If an historical price exists in the database a price will appear in the Price Est field and the Src Price field will populate automatically.
6. Click **Save.**

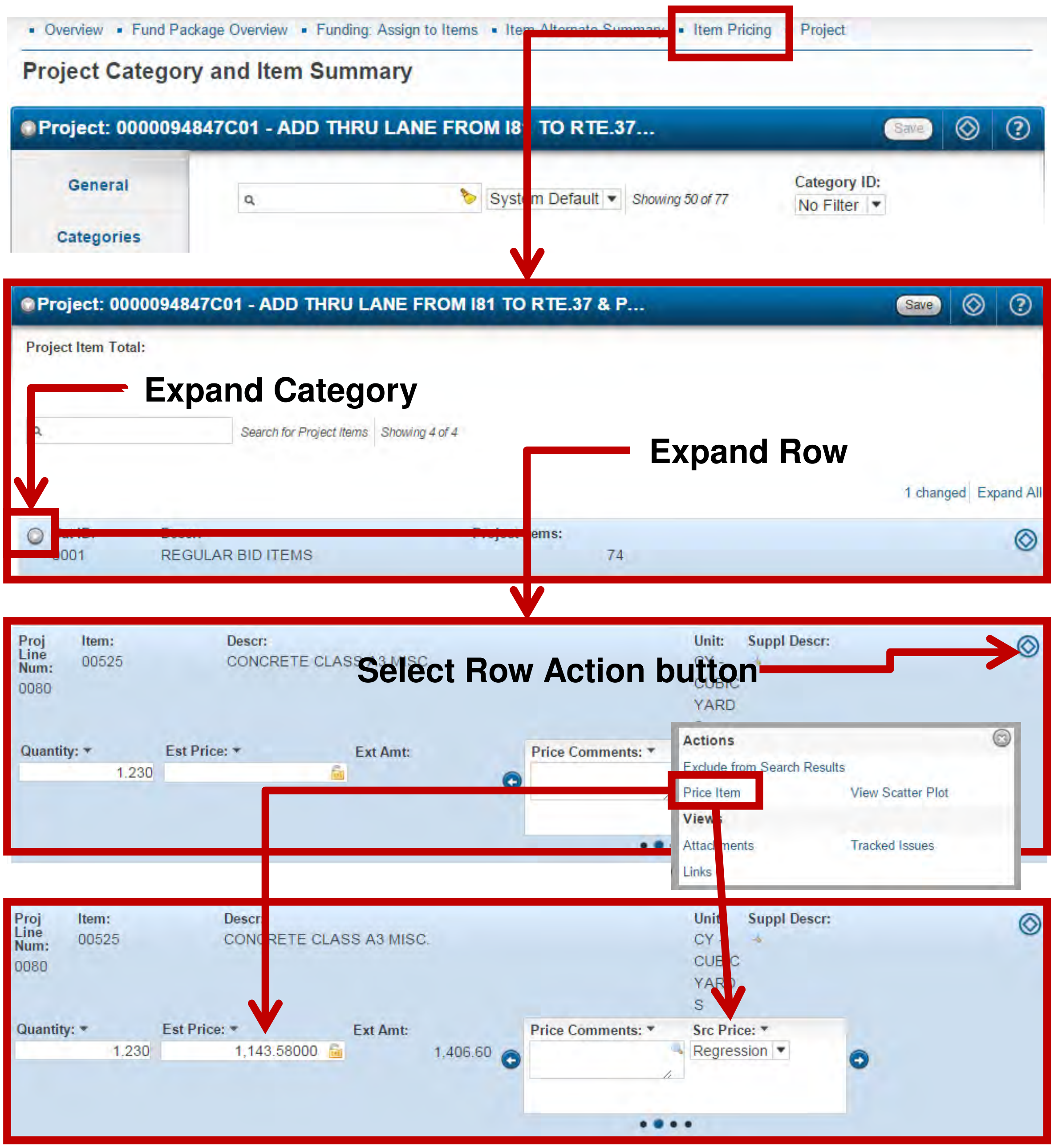


Figure 2 – Generate Price for Single Item

7.3 Enter a Price Manually

If you know the price of a particular item or the database does not generate one for you, to enter a price manually perform the following steps.

1. From an open project select the **Item Pricing** quick link.
2. Expand the **Category** of the item you wish to price.
3. Enter your price in the **Est Price** field
4. Click the **padlock icon** to lock the price.

Note: Locking the price is important so that when the Generate price process is run, it does not overwrite the price that you entered.

5. The Src Price field automatically populates Ad Hoc.

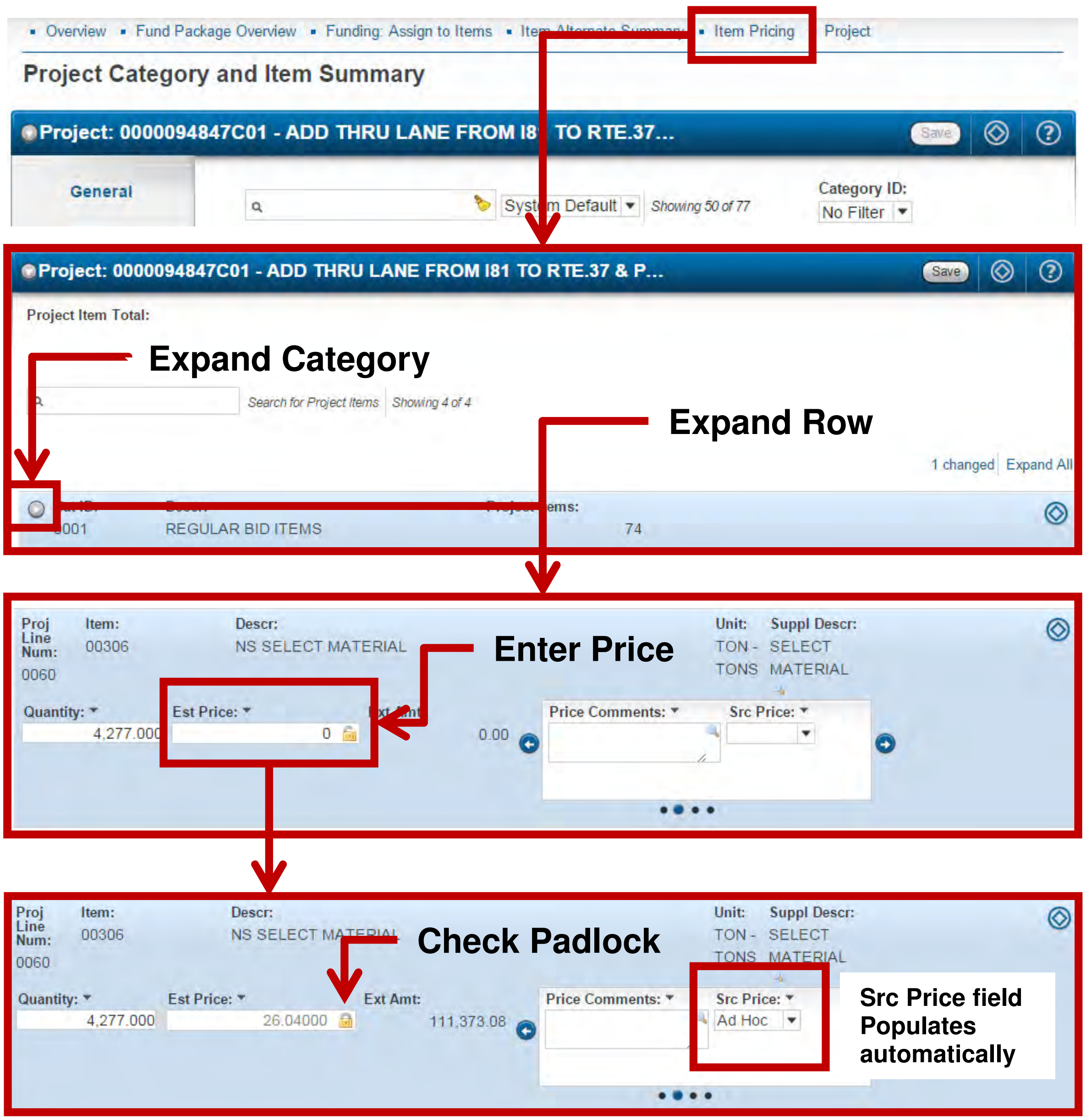


Figure 3 – Enter a Price Manually

7.4 Price Scatter Plot

VDOT uses the BAMS/DSS HREF profile which allows users to View a Scatter Plot of prices from the 2-year Bid History.

If the item record includes a quantity, that information is used as an additional parameter in the profile. The system displays the scatter plot in a new browser window.

To View a Scatter Plot, perform the following steps:

1. Open the project of your choice.
2. Select the **Item Pricing** quick link.
3. Expand the **Category** you wish to view.
4. Select the **Row Action button** for the row you wish to see the scatter plot.
5. Select **View Scatter Plot**

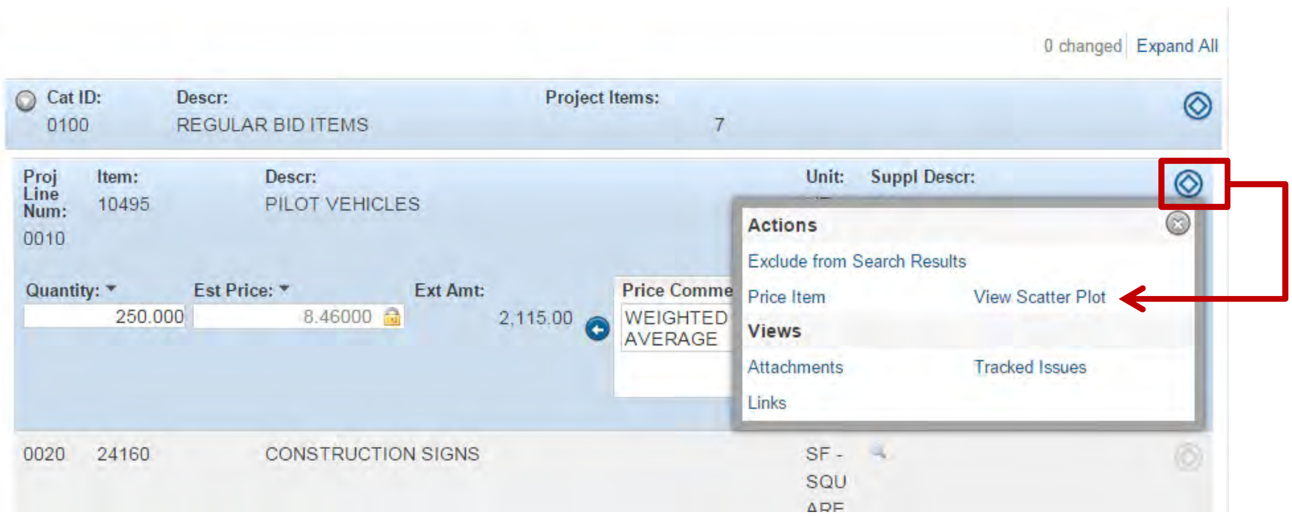


Figure 4 – How to View a Scatter Plot

The Scatter Plot is an interactive window where you can move your cursor over the dots in the graph to show additional information in the upper right corner of the graph. This data is currently based on 2 years from January 2013 through January 2015.

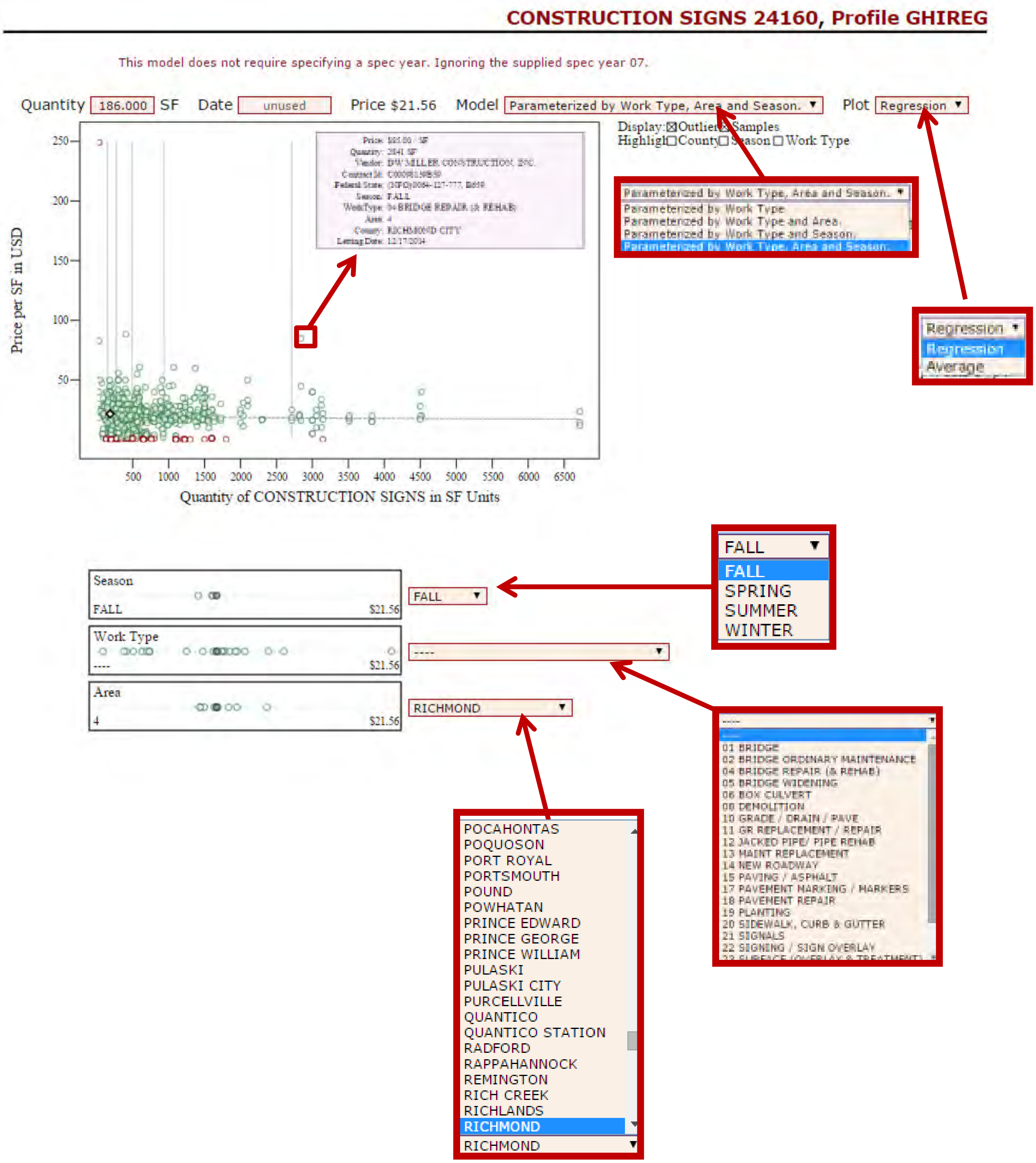


Figure 5 – Scatter Plot Overview

7.5 Running the Preliminary Project Detail Estimate VDOT Report

The Preliminary Project Detail Estimate VDOT report is a group of reports that uses the Engineer's estimated prices to produce are cost report that includes add-on engineering and contingency percentages and funding breakdowns.

This report has been designed with extra error checking features that the Validation process does not provide. *Users should pay special attention when their report has red messages, those indicate an error and will indicate what corrections are needed.*

The report is comprised of four individual reports:

- Cover Page
- Summary Sheet
- Cost Estimate
- Funding Summary

When you generate this report, you can choose to include one, several, or all of these reports.

7.4.1 Running the Detail report from the Dashboard

1. Click the Dashboard Global Action button.
2. Select Generate Report.
3. Choose **Preliminary Project Detail Estimate VDOT** from the list, a green check box appears to the left. It automatically moves to page 2.
4. In the search box, **enter the desired UPC number**.
5. **Click the desired Project ID** from the list, a green check box appears to the left.
6. Click the blue **Next arrow** button on the upper right of your screen.
7. Check or uncheck the boxes from the list of 4 report pages that you desire, all 4 default as checked.
8. Click the **Execute** button on the blue component bar.
9. The report opens in a new Browser tab.

Note: Please remember to save or print the PDF, this is the only time you will have the opportunity to do so. Otherwise, you will have to re-run the report.

7.4.2 Running the Detail report from an open Project

This report can be run in almost every quick link page within a project.

1. Open the desired project.
2. Click the blue component Action Button.
3. Select Preliminary Project Detail Estimate VDOT
4. Check or uncheck the boxes from the list of 4 report pages that you desire, all 4 default as checked.
5. Click the **Execute** button on the blue component bar.
6. The report opens in a new Browser tab.

Note: Please remember to save or print the PDF, this is the only time you will have the opportunity to do so. Otherwise, you will have to re-run the report.

8. PRIME PROJECTS

A Prime Project is created by the Project Manager and is the method Trns·port uses to make a "combined estimate". After the initial project is created and copies are made for the appropriate project disciplines/users, the Prime Project is created. All related projects are then associated to the Prime Project. Next, the projects are moved to the other disciplines/users by changing the **Control Group.** The Project Manager can no longer see the projects associated to the prime but can, however, generate a Prime Level Detail Estimate (at any time) to print a combined estimate.

The Prime has 2 functions:

1. Provides the Team leader (that create the Project's Proposals for advertisement) the list of correct Web Trns·port projects from the database. For example: Some advertisements consist of more than 1 UPC.

2. Uploads cost estimate information to the PCES module of IPM.

Prime Project ID: Is 13 digits and **always begins with a C** and ends with the Project ID number of the largest project (most money). For example, if the projects to be combined are: 00009845C02, 00009845B21, 00009845B22, 00009845T01 and 00009845L02:

Prime Project ID = **C000009845C02**.

- In most cases, the Project used for the Prime Project will also be the Controlling Project.

Whether you, as a user, create a Prime Project or not can be determined by the three cases described below:

Case 1: It is the responsibility of the Project Manager to create the original project and make the appropriate copies for the other disciplines/users on the project team (i.e. Bridge, Traffic Engineering, Environmental)
The Project Manager will create the Prime Project and associate all projects to it then move the projects to the team members respective control groups.

Case 2: The designer who is not the Project Manager receives a project from the Project Manager. The project has been linked to the Prime Project by the Project Manager. Therefore, this designer will not create a Prime Project unless directed by the Project Manager to do so.

Case 3: The designer of a "stand-alone" project (a project in which no other division will be involved) shall create a Prime Project and associate the project(s) to it. A Prime is required even if there is only one project.

8.1 Adding a Prime Project

To **add a Prime Project** from the **Prime Project Overview screen** follow these steps:

1. Click on the **Prime Project link** from the Preconstruction Dashboard found on the Home page.
2. Open the Prime Project Overview header's **Action Menu** and click on **Add**.
3. The Add Prime Project screen opens.
4. Enter the **Prime Project data** and click the **Save** button when finished.

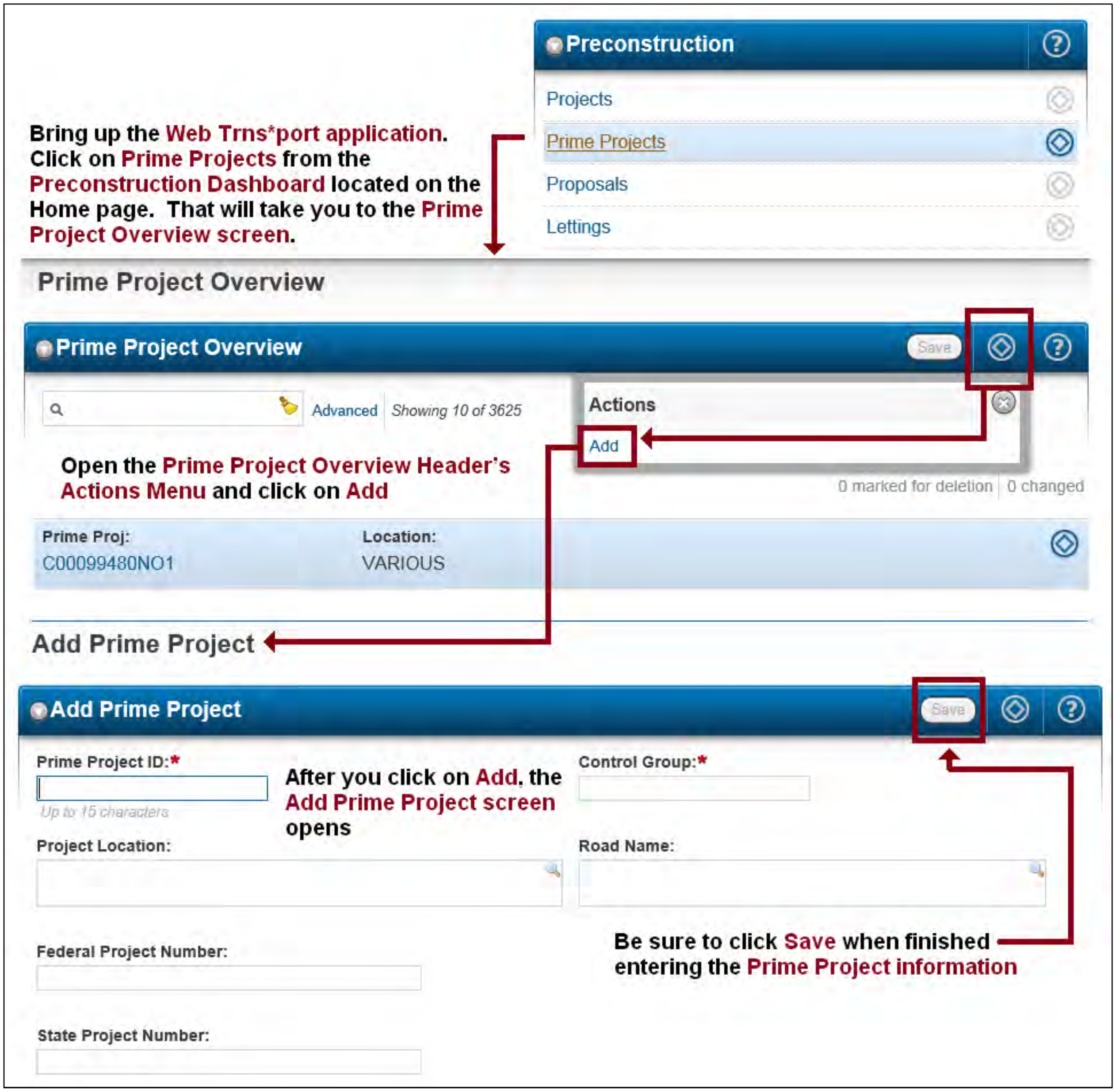


Figure 1 - Adding a New Prime Project from the Prime Project Overview Screen

PRIME FIELD DESCRIPTIONS:

Prime Project ID: 13 Digits and must start with a C and ends with the Project ID number. Ex: **C000104340C01** or **C000009845C02**

Control Group: The control group is the security designation which decides which user has access to which prime project(s). This field will already be filled out with your control group. The data in this field may be changed in order to transfer the prime project to another control group.

Project Location: Use the first line for the **From:** information and the second line for the **To:** information. Bridge projects will use the location from the title sheet.
Ex: FROM: 0.09 MI. W. WEST HIGHLANDS BLVD.
TO: 0.01 MI. W. WEST HIGHLANDS BLVD.

Federal Project Number: Enter the Federal Project Number, if applicable, in its entirety, complete with dashes, parentheses, etc. If the project is not federally-funded, enter **NONE**. Ex: STP-5A03(264)

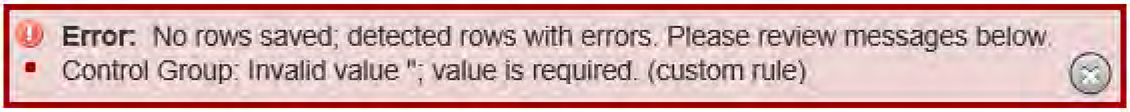
State Project Number: Enter the state project number in its entirety, complete with dashes, commas, etc. Ex: (NFO) 0615-047-169, C501

Federal Appropriation Codes: Not currently used.

Road Name: Enter the name of the road or leave blank.
Ex: HOLLAND ROAD or RTE 628, MCCLELLAN ROAD

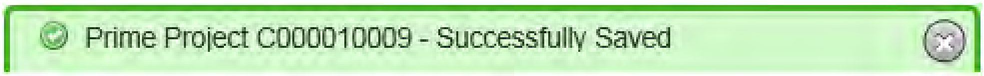
Click the SAVE button on the Add Prime Project header to save the data and enter the Prime Project into the Trns·port database.

- If a required field was not filled-in, an **Error** message will display:



In the above example, **no data was entered** into the required field **Control Group**.

- If you have completed all required field criteria satisfactorily, the prime project will be added.



The Prime Project will open on the **Prime Project Summary screen** for the newly added Prime Project and will display all **three tabs: General, Projects and Workflow** where the remaining fields shall be entered; the projects associated and the Workflow selected for the appropriate stage of the Prime.

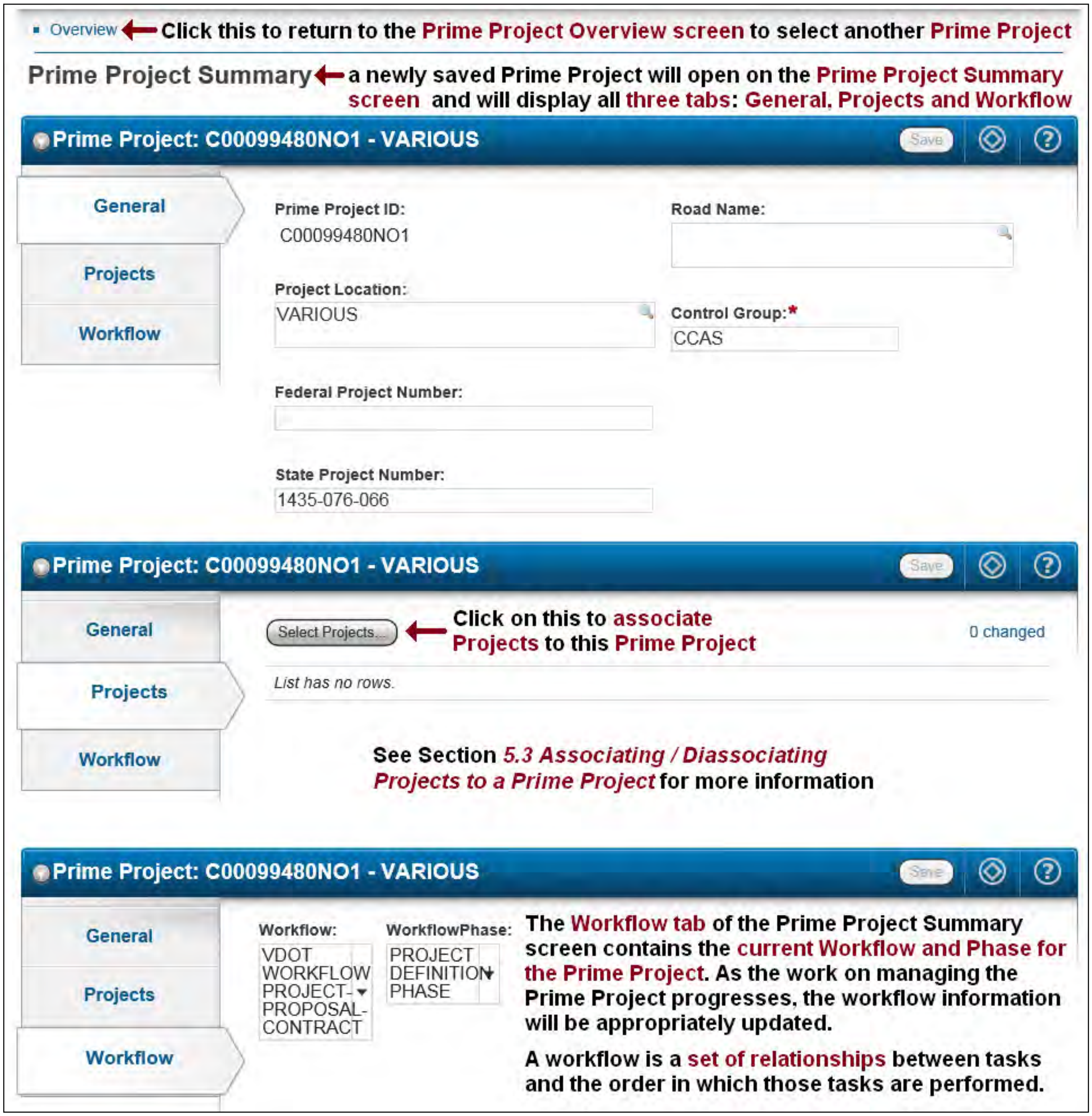


Figure 2 - The Prime Project Summary Tabs

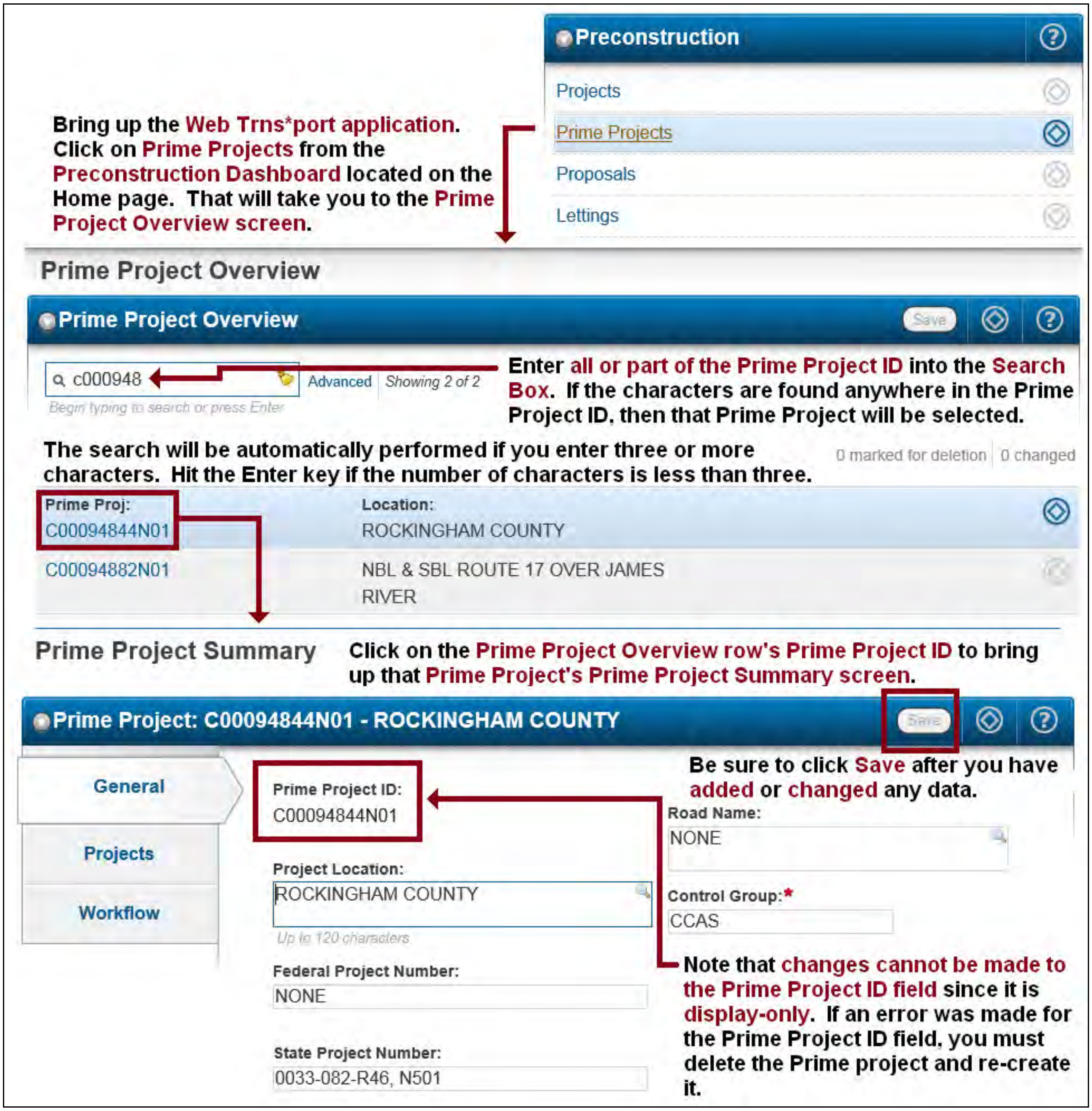


Figure 3 - Selecting a Prime Project

8.2 Associating Projects to a Prime Project

The Prime project must have at least one project associated to it for a valid Prime. To associate one or more projects to the Prime Project

1. In the modal window, type **all or part of the Project ID** in the **Quick Find search box** to locate the Project you want to associate with the Prime Project.
   - The system lists all the projects that meet your search criteria.
2. **Click the row** for each Project you want to associate with the Prime Project.
   - The system adds a **green check mark** beside each project you select and **shades the row blue.** To cancel a selection, click the selected row again.
3. **Click the Add to Prime Project button.**
   - The system closes the modal window and displays the Projects tab of the Prime Project Summary with the new projects added to the list.
4. **Click the Save button.**
   - The system displays a message to confirm that your changes were saved in the database.

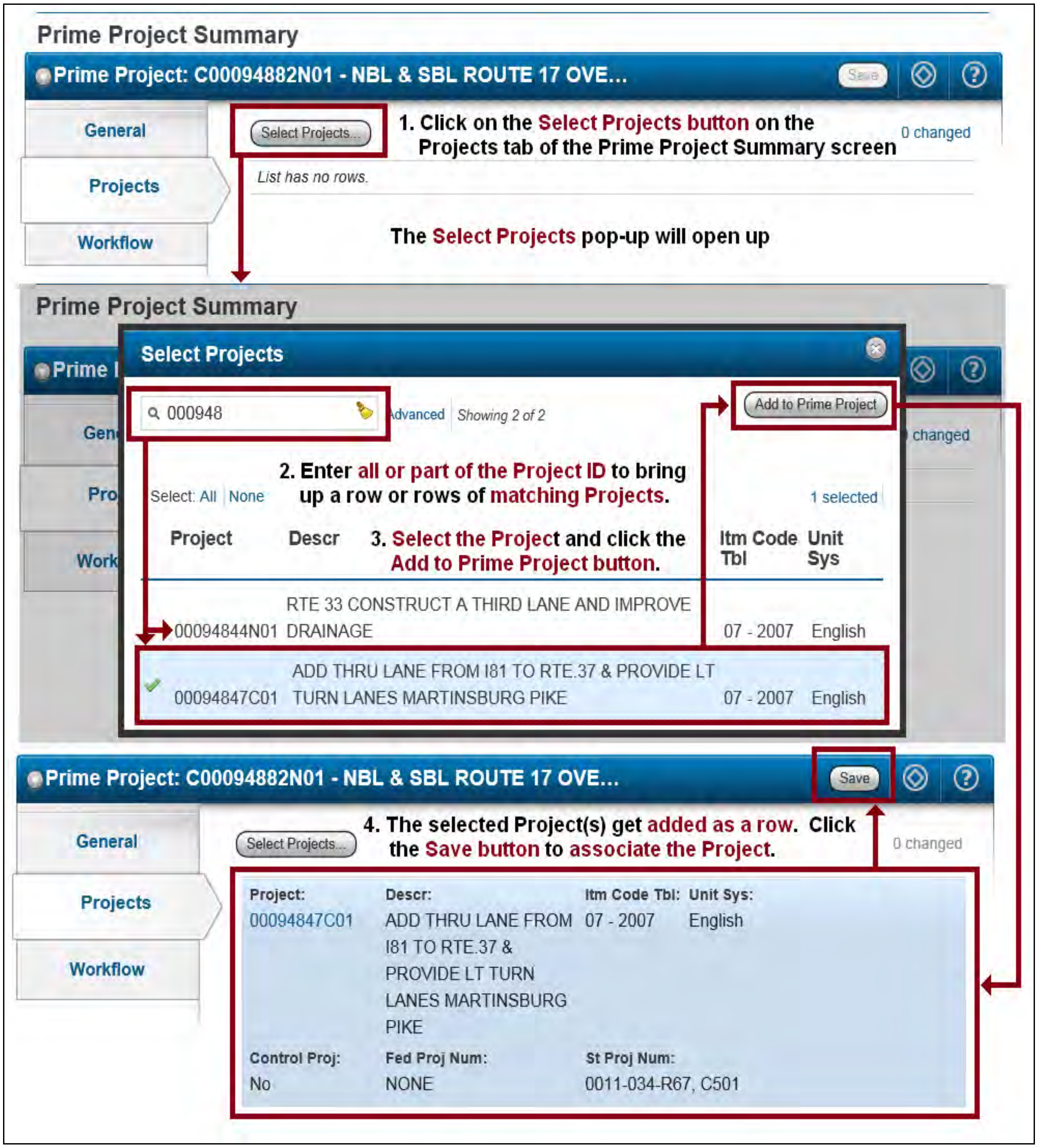


Figure 4 - Associating a Project to the Prime Project

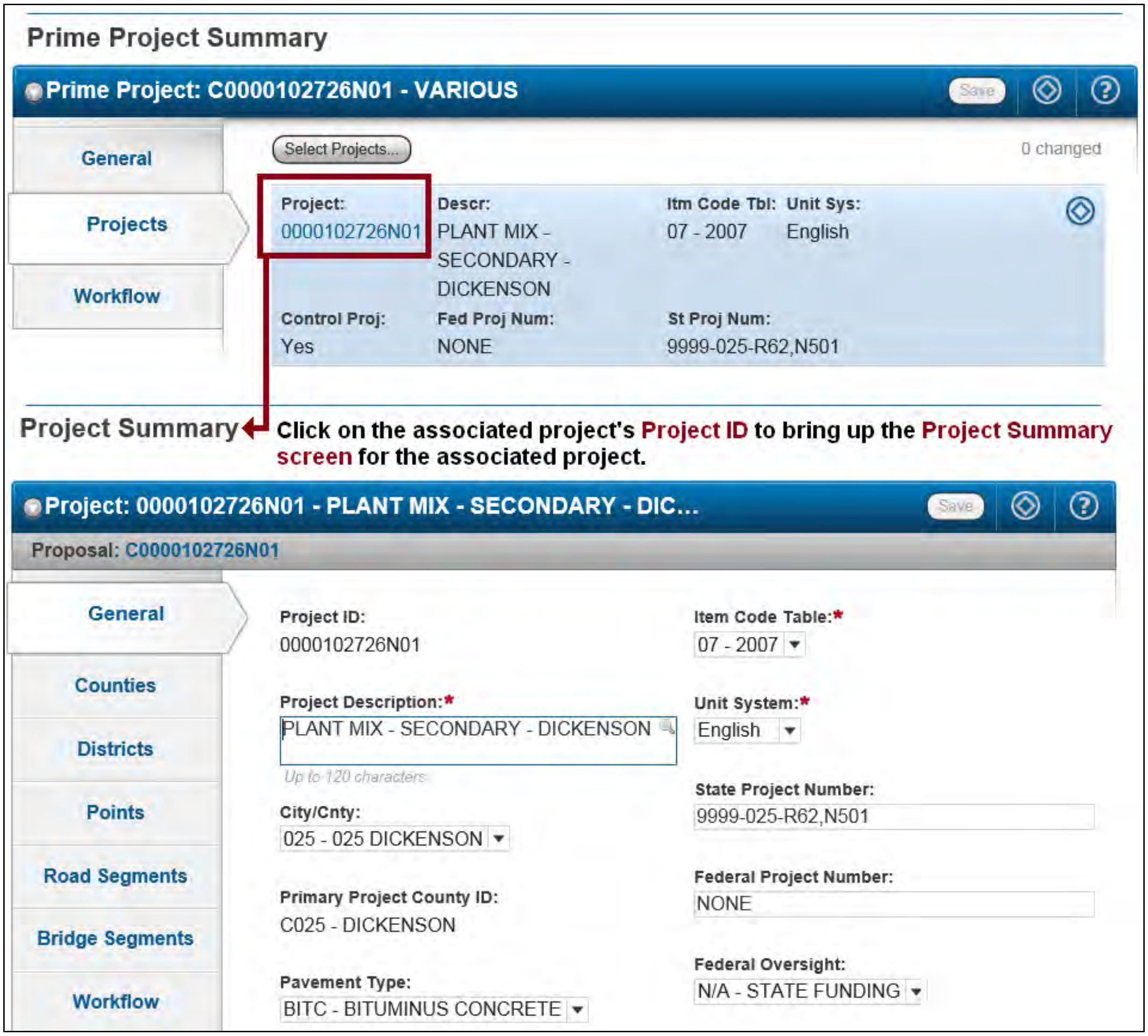


Figure 5 - Viewing a Project after selecting it as an Associated Project

Controlling Project

A **checkbox** is used to designate a Project as a **Controlling Project**, which is the Controlling Project in a Proposal containing multiple projects. **The Project with the majority of the Construction funds/money should be the Controlling project.**

- There can be only **one Controlling Project** designated **per Prime/Proposal.**
- In most cases, the Project used for the Prime Project will also be the Controlling Project.

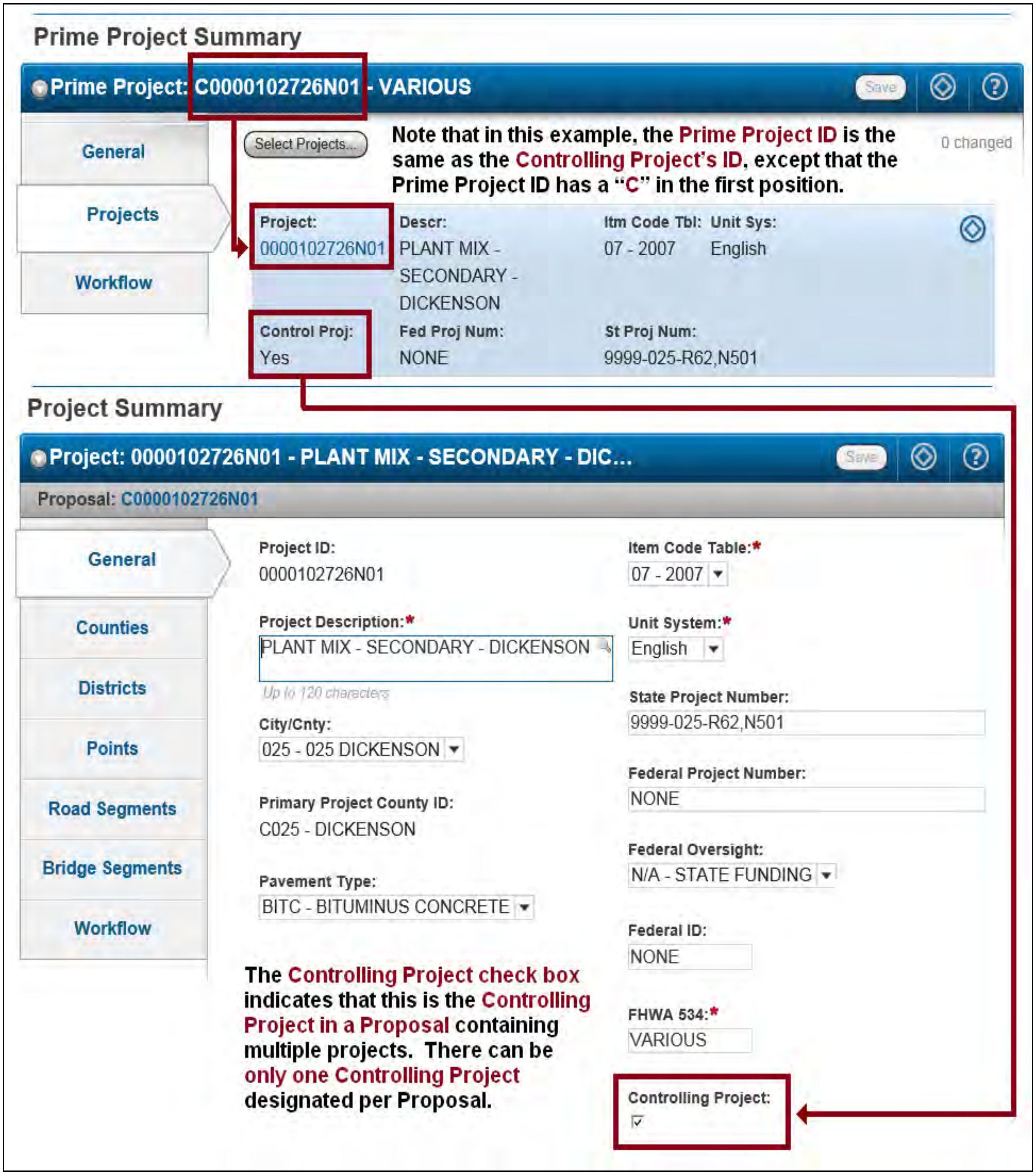


Figure 6 - The Prime Project and the Controlling Project

8.3 Workflow tab

The Workflow tab on the Project Summary screen contains the current workflow and phase for the Project. To complete the Prime set the following Workflow settings:

1. Click the **Workflow** tab.
2. In the **Workflow** field, click the drop-down arrow and select **VDOT Workflow-Project-Proposal-Contract**.
3. In the **WorkflowPhase** field, click the drop-down arrow and select **Project Definition Phase**.
4. Click the **Save** button.

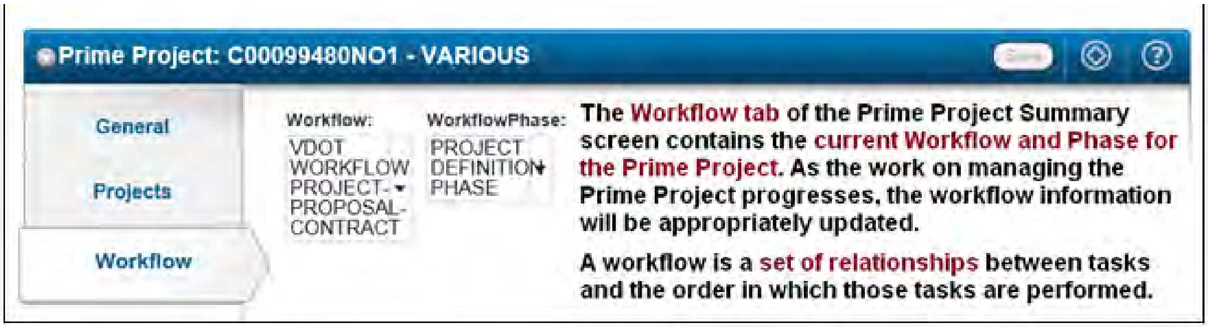


Figure 7 - The Workflow Tab

<u>Workflow Phase Definitions</u>

Project Definition Phase	Engineers/Designers Use
Proposal Definition Phase	Select VDOT personnel and Construction Division Use
Advertisement Phase	Construction Division Use Only
Addenda Phase	Construction Division Use Only
Bid Letting Phase	Construction Division Use Only
Post Bid Evaluation Phase	Construction Division Use Only
Preconstruction has ended Phase	Construction Division Use Only
Moved to Construction/SiteManager	Construction Division Use Only
Historical Phase	Construction Division Use Only

8.4 Disassociating Projects from a Prime Project

Warning: When **Remove is selected**, the Project Row is **automatically removed**. There is no opportunity to reverse the selection, as the **row is immediately removed without clicking the Save button**. To restore the row, you must associate the Project back to the Prime Project.

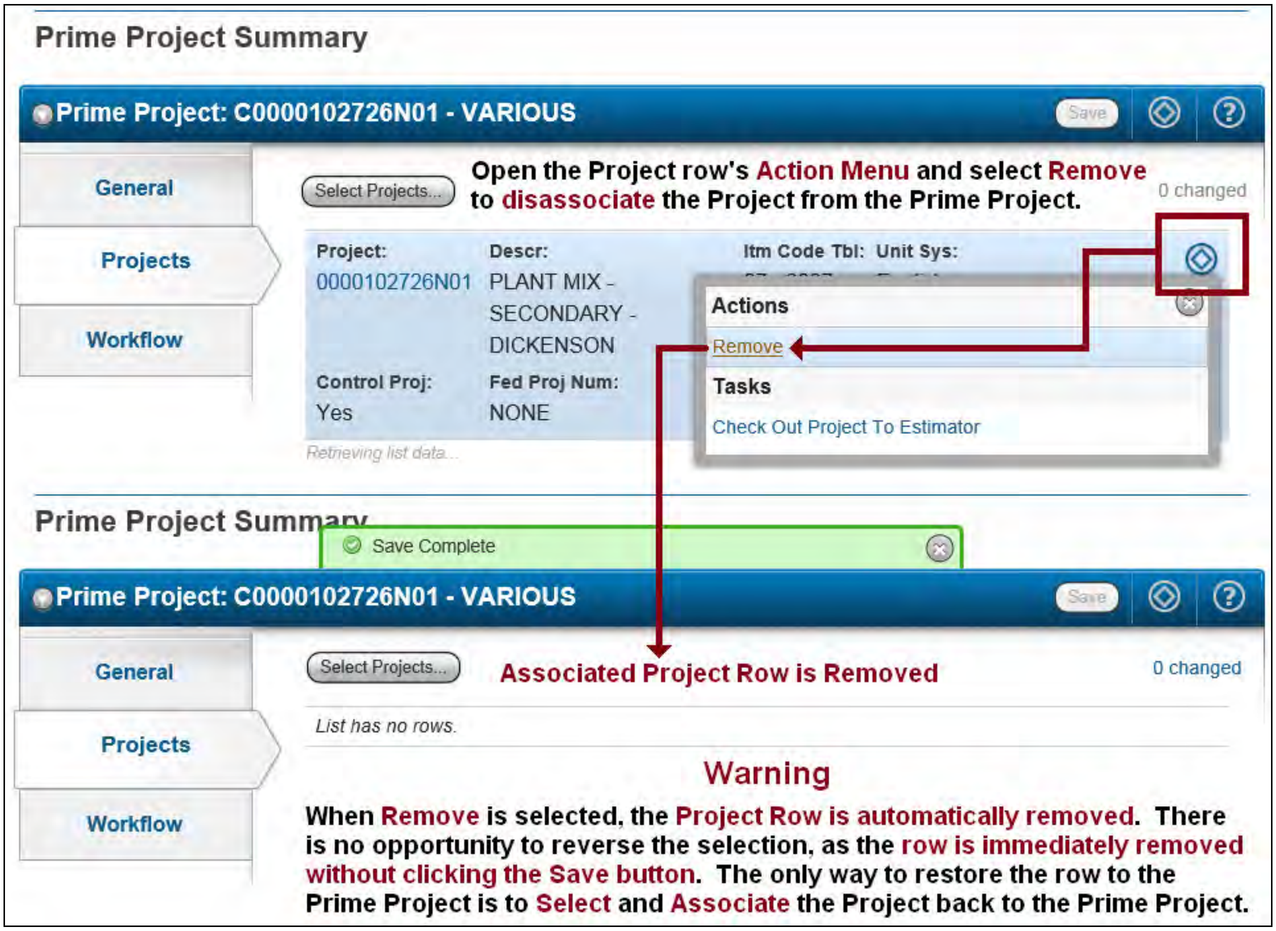


Figure 8 - Disassociating (Removing) a Project from a Prime Project

To **remove a Project from the Prime Project**, select **Remove from the Actions menu** for the Project you want to dissociate. The system removes the selected Project from the Prime Project and **saves the change automatically.**

8.5 Deleting a Prime Project

In the Old (Client/Server) version of Trnsport, only system administrators could delete Prime projects. That is no longer the case all users now have Prime deletion privileges.

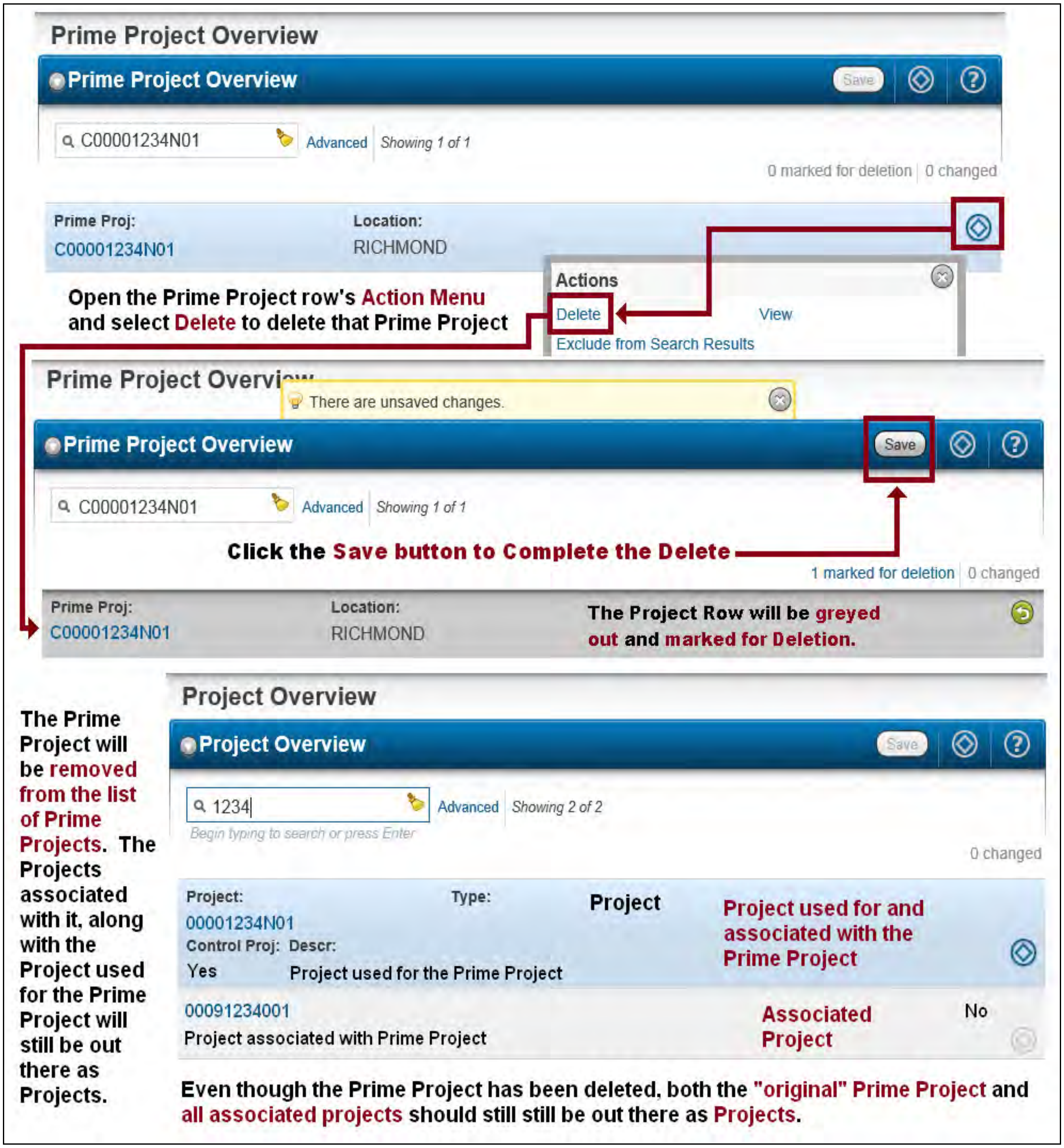


Figure 9 - Deleting a Prime Project

Follow these steps to **delete a Prime Project:**

1. **Disassociate all Projects from the Prime Project.** All projects must be disassociated before Deleting a Prime.
2. At the **Prime Project Overview screen**, bring up the **Prime Project** and select **Delete** from the row's **Action Menu.**
   - The selected Prime Project row to be deleted will **turn grey.**
   - You can **reverse the delete** at this time by clicking the **Reverse** **button,** found in the right corner of the row marked for deletion.
3. Click the **Save button to complete the Delete.**
   - The Prime Project will be removed from the list of Prime Projects.

8.6 Running the Prime Project Detail Estimate VDOT Report

The Prime Project Detail Estimate VDOT report is a combined report that calculates the totals for all the projects associated to the Prime.

The report is comprised of four individual reports:

- Cover Page
- Summary Sheet
- Cost Estimate
- Funding Summary

When you generate this report, you can choose to include one, several, or all of these reports.

8.6.1 Running the Detail report from the Dashboard

1. Click the Dashboard **Global Action** button.
2. Select **Generate Report**.
3. Choose **Preliminary Prime Detail Estimate VDOT** from the list, a green check box appears to the left. It automatically moves to page 2.
4. In the search box, **enter the desired UPC number**.
5. **Click the desired Project ID** from the list, a green check box appears to the left.
6. Click the blue **Next arrow** button on the upper right of your screen.
7. Check or uncheck the boxes from the list of 4 report pages that you desire, all 4 default as checked.
8. Click the **Execute** button on the blue component bar.
9. The report opens in a new Browser tab.

Note: Please remember to save or print the PDF, this is the only time you will have the opportunity to do so. Otherwise, you will have to re-run the report.

8.6.2 Running the Detail report from an open Project

This report can be run in almost every quick link page within a project.

1. Open the desired project.
2. Click the **Action Button** on the blue component bar.
3. Select **Preliminary Prime Detail Estimate VDOT**.
4. Check or uncheck the boxes from the list of 4 report pages that you desire, all 4 default as checked.
5. Click the **Execute** button on the blue component bar.
6. The report opens in a new Browser tab.

Note: Please remember to save or print the PDF, this is the only time you will have the opportunity to do so. Otherwise, you will have to re-run the report.

9.   MANAGING PROPOSALS

After you have finished with the Project(s), Category(ies), Funding, Items, and the Prime you are ready to create the proposal. A Trns·port proposal is one or more projects grouped together for bid-letting.

Generally, the Construction Division personnel create the proposal. The proposal for some Maintenance-funded projects is created by personnel in other divisions and or districts.

A proposal is similar to a project in that it contains items or work, but it also contains bidding information, such as DBE and WBE goals. Trns·port combines ‘like items’ into a single biddable item so that bidders only view and bid on the item once. Trns·port automatically generates proposal line numbers.

Proposals can be created two ways in Trns·port. The user can create a proposal from a project or create a proposal from scratch. Creating a proposal from a project pulls general data from the project and automatically assigns the project to the proposal. Creating a proposal from scratch requires the user to add the general information to the proposal and then assign the project(s) to the proposal.

9.1 Creating a Proposal from a Project (Most Common Method)

From the Preconstruction component select **Projects**. This will take you to the Project Overview Screen. Find the project you wish to create a proposal for in the project list. Select the project row Actions menu and select **Create Proposal from Project**.

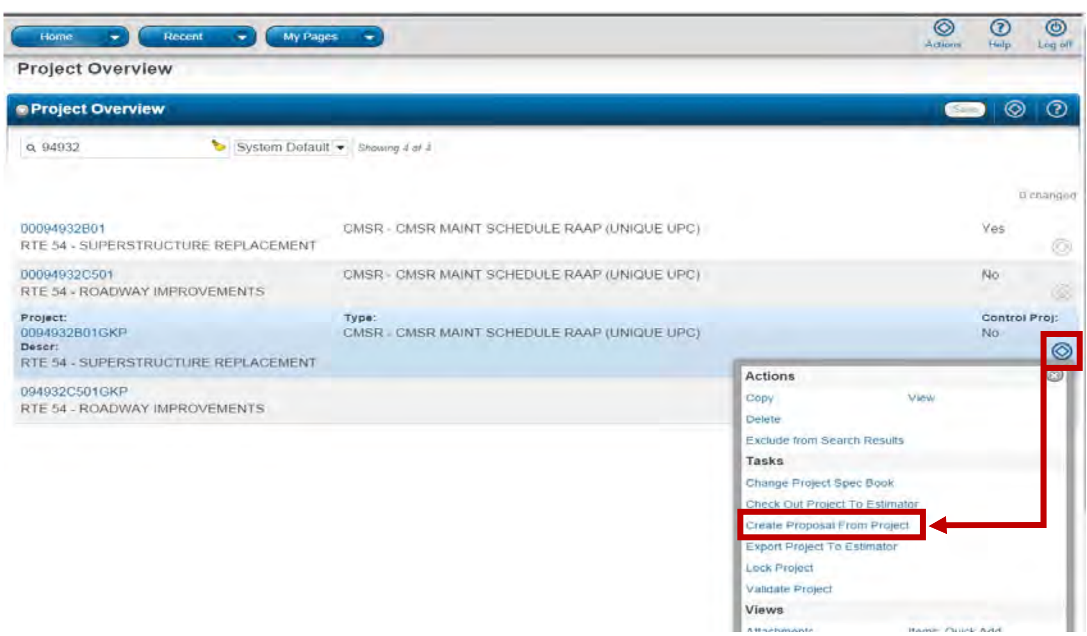


Figure 1 – Project Overview Screen

An Add Proposal window appears. Notice that Proposal ID, Proposal Description, Federal Project Number, and State Project Number 1 fields are automatically filled in from the project data.

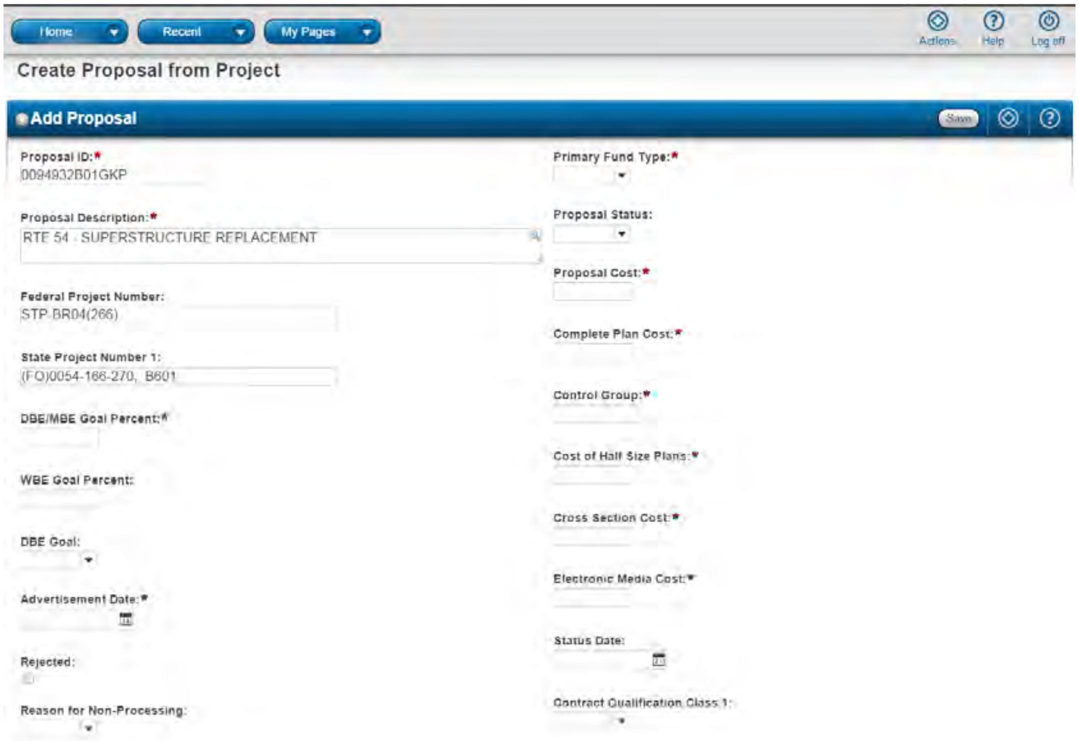


Figure 2 – Creating a Proposal from a Project Screen

Some fields have Reference Tables. As you click in each field, a drop-down arrow will appear.

Some fields are required; the proposal will not be saved to the database unless the required fields are filled-in. The required fields are listed with a red asterisk behind the field name. Non required fields should also be filled in if applicable.

FIELD DESCRIPTIONS:

Proposal ID: Same as the Prime Project ID. (See **Appendix A – A.4 Prime Project ID and Contract ID** for further details.)

Proposal Description: Enter a short description of the work to be performed.

Federal Project No.: Enter the federal project number, if applicable, in its entirety, complete with dashes, parentheses, etc. If the project is not federally-funded, enter NONE. **EXAMPLE**: NH-5401(876)

State Project Number: Enter the state project number in its entirety, complete with dashes, commas, etc. **EXAMPLE**: (NFO) 7029-021-103, C502

DBE/MBE Goal (PCT): Percentage that has been determined by the Civil Rights Division.

DBE Goal: From the drop-down menu, select a code indicating which of the two goals described above apply to this proposal. If you enter NONE, no goals will be printed on any report. If you enter DBE, only the DBE/MBE goal will be printed, labeled as a DBE goal. If you enter BOTH, both the DBE/MBE goal (labeled as an MBE goal) and the WBE goal will print.

Advertisement Date: Enter the Advertisement Date in MM/DD/YYYY format. You may select the date by pressing the calendar icon also.

Contract Type: Select the appropriate code from the drop-down menu.

Proposal Type: Select the appropriate code from the drop-down menu.

Contract Work Type: Select the appropriate code from the drop-down menu.

Progress Schedule Category: Select the appropriate code from the drop-down menu.

Primary Fund Type: Select the appropriate code from the drop-down menu.

Cost of Proposal: As determined by Construction Division.

Complete Plan Cost: As determined by Construction Division.

Cost of Half Size Plans: As determined by Construction Division.

Cross Section Cost: As determined by Construction Division.

Electronic Media Cost: As determined by Construction Division.

Control Group: The control group is the security designation which decides which user has access to which proposals(s). This field will already be filled out with your control group. The data in this field may be changed in order to transfer the project to another control group.

Qualification Classes: Not used by designers.
Once you have filled in the correct fields, click the **Save** button. If the Proposal ID you created is already in the system, you will receive an error message. You will also receive an error message if you have left any required fields blank.

Once the proposal is saved, you will be directed to the Proposal General Tab. Notice that other fields are now displayed on the Proposal General Tab. These fields include:

Order/Call No.: Construction Division will fill in this field.

Location: Type the location with format**: FROM: (location) TO: (location)**.
For Bridge projects, enter the location from the front sheet title block.

Primary County: Notice that the Primary County has been populated from the project.

Primary District: Notice that the Primary District has been populated from the project.

Plan Reviewer: As determined by Construction Division.

Mandatory Showing: Select the appropriate value. Y (YES) or N (NO)
NOTE: Select Y ONLY if the showing is mandatory. If not then select N. You can still enter the showing location for non mandatory showings.

NOTE: To add a new showing location code to the code follow these instructions: (this can only be performed by certain individuals in the Construction Division).

1. Click on the button Show Location at the bottom of the Proposal General Tab.
2. On the bottom of the list click to insert new show location record.
3. Enter the location code: For example: If Bristol, enter '01' followed by the next sequence for the district (0159).
4. Enter location description. For example: Lebanon Residency.
5. Enter the physical address: for example: 100 Easy Street.
6. Enter City, State and Zip code.
7. Enter location detail.
8. Comments: This field is used if you need to explain the location. For example: no physical address or need to give directions.

Once you are done, click insert data. You must logoff Web Trns*port and back on to see the newly added location code.

Showing Location Code: Select the location code from the dropdown menu.

Showing Time: As determined by Construction Division.

Showing Location: Enter extra showing information in this field as needed.

Showing Date: As determined by Construction Division.

CTB Meeting Date: The actual date that the Transportation Board holds their meeting for award recommendation.

Previously Let As CONTID: If the proposal represents a project that has been let in the past, put the CONTID (Contract ID) of that previous proposal here. Trns·port will use this field in the LAS schedule to produce a report on the letting history. If the proposal has been re-let several times, always enter the most recently used CONTID here; Trns·port will trace the chain back to its source.

9.2 Changing a Proposal

From the Preconstruction component select **Proposals**. This will take you to the Proposal Overview Screen. Use the Search Box to find the proposal that you created. To view the proposal, click the Proposal ID field in blue.

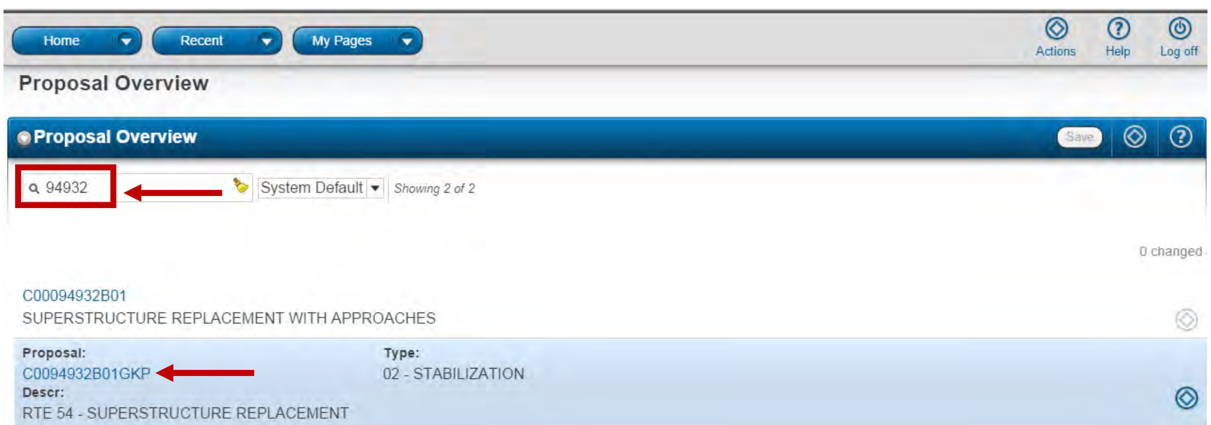


Figure 3 – Proposal Overview Screen

This will take you to the Proposal General Tab where you can make edits to the fields. Note that changes cannot be made to the **Proposal ID** field as it is display-only. Once you have made edits, click the **Save** button to save changes. A Save complete message will display.

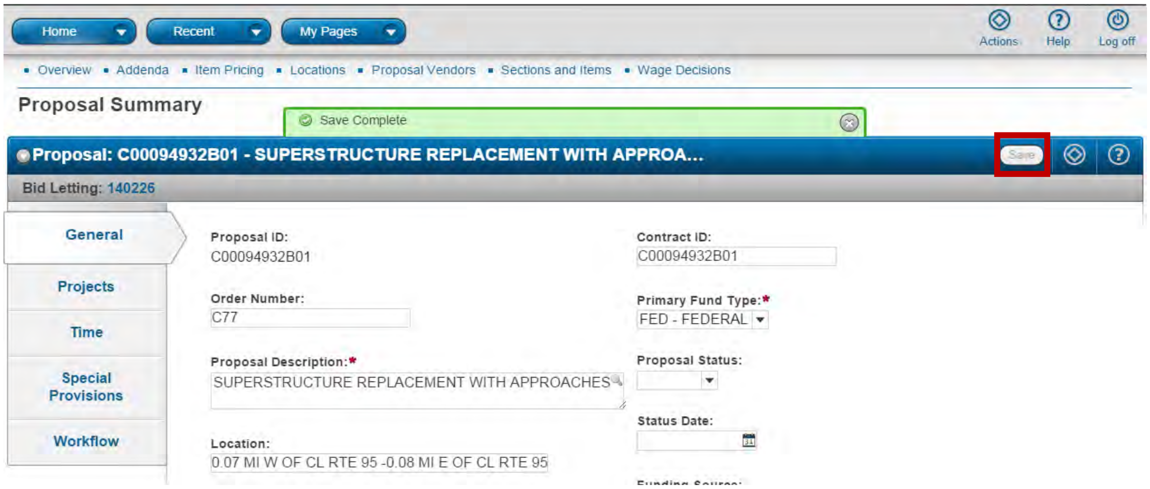


Figure 4 – Updating a Proposal Screen

9.3 Associating / Disassociating Projects to a Proposal

Click on the **Projects** Tab on the left side of the page to display the list of Projects associated to the Proposal.

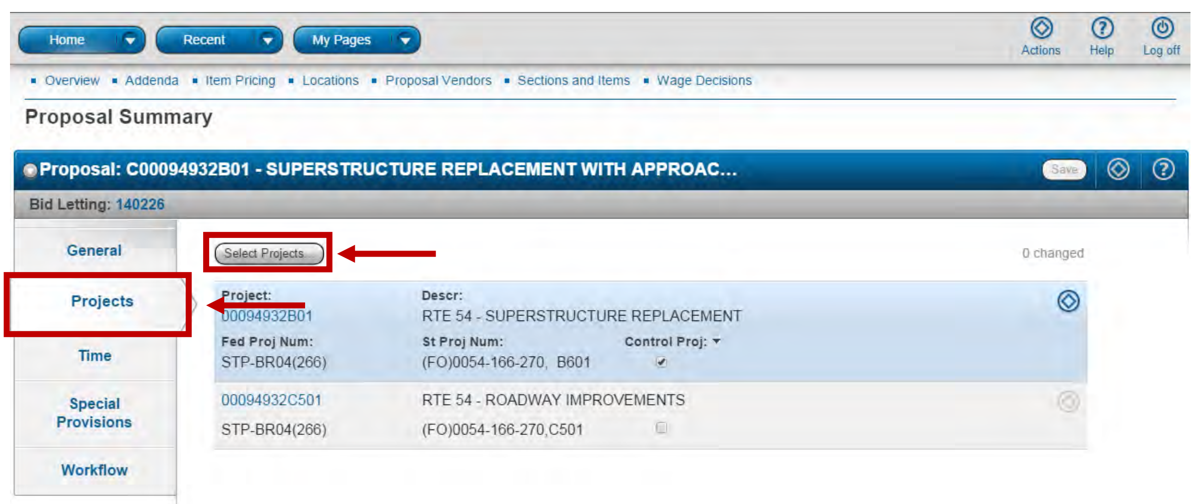


Figure 5 – Projects Tab Screen

9.3.1 Adding Projects to the Proposal

To add a project to the proposal, select the 

button. This will display a master list of all projects. Use the Search box to find the project you want to add to the proposal. Click over the Proposal ID to select the proposal. A green check will display to the left of the Proposal ID and the entry will be highlighted blue.

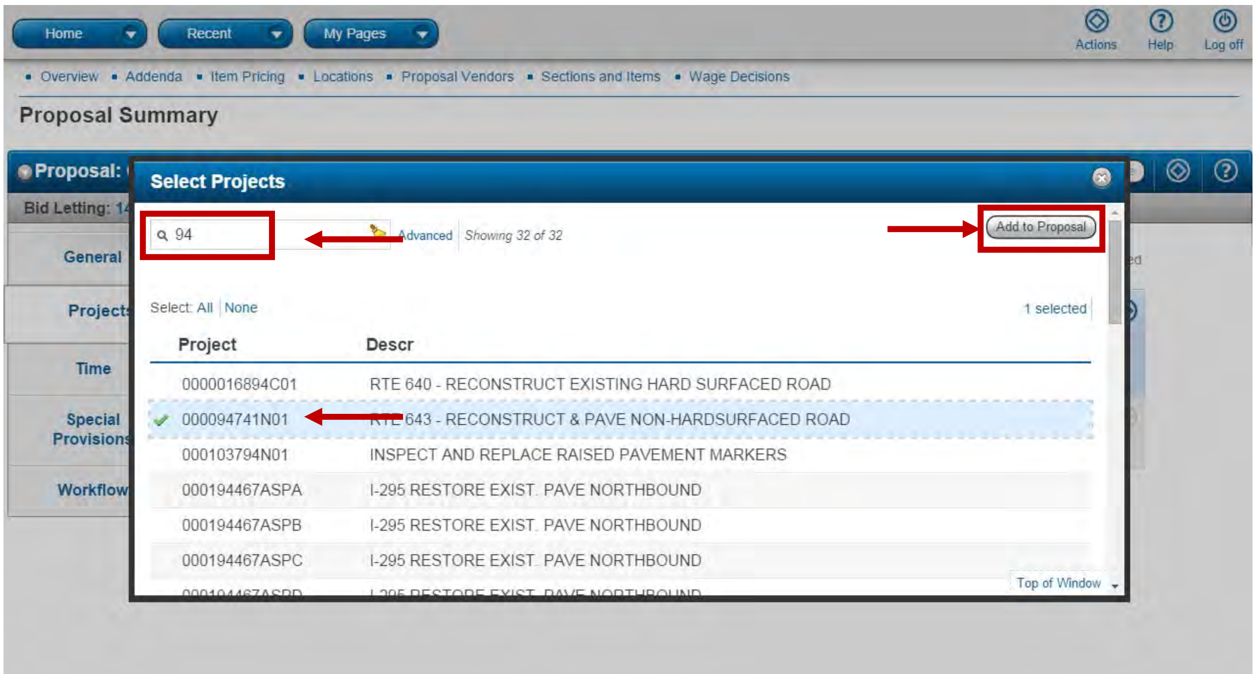


Figure 6 – Adding Projects to Proposal Screen

Select the 

button to add the selected projet to the proposal.

9.3.2 Deleting Projects from the Proposal

To delete a project from the proposal, select the row actions button for the project in the list on the Projects Tab. Select **Remove** from the actions list. The project is removed and a message of Save Complete will be displayed.

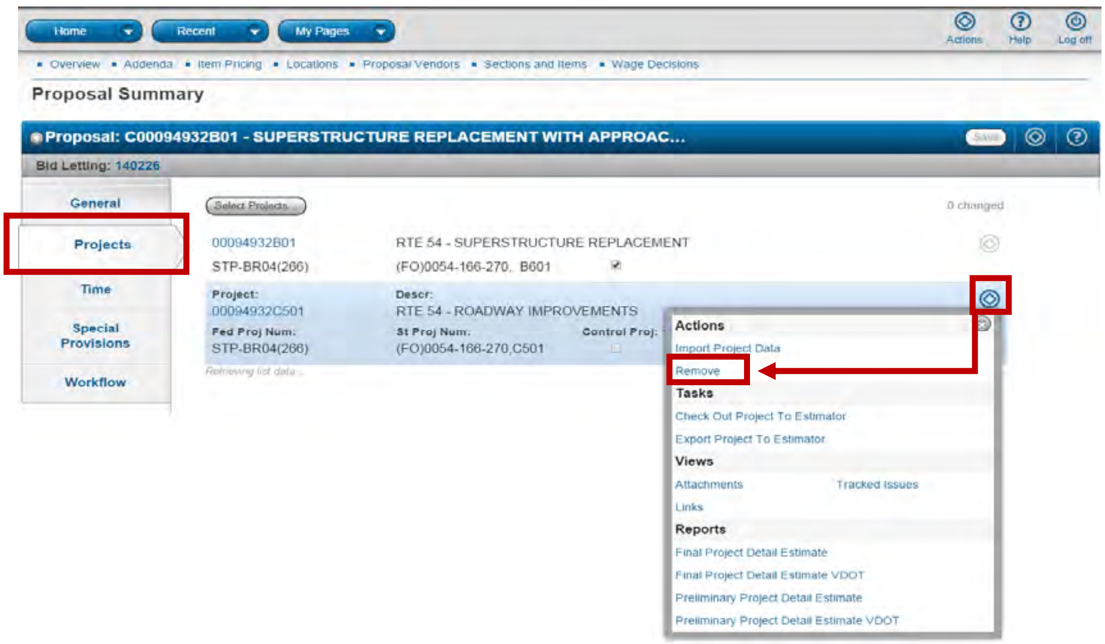


Figure 7 – Removing Projects from Proposal Screen

9.4 Assigning Time Locations

Each proposal must have at least one time, numbered **00**, in order to specify time limits and liquidated damages in Site Manager. Trns·port allows three types of days: available days (AD), calendar days (CD), and fixed completion date (DT). Cost Plus Time bidding information is also entered at the proposal time level but is only used for the calendar days.

To enter your time, click on the Time Tab and select New. A New Proposal Time entry will display with multiple fields. Click the **Save** button once the fields are entered.

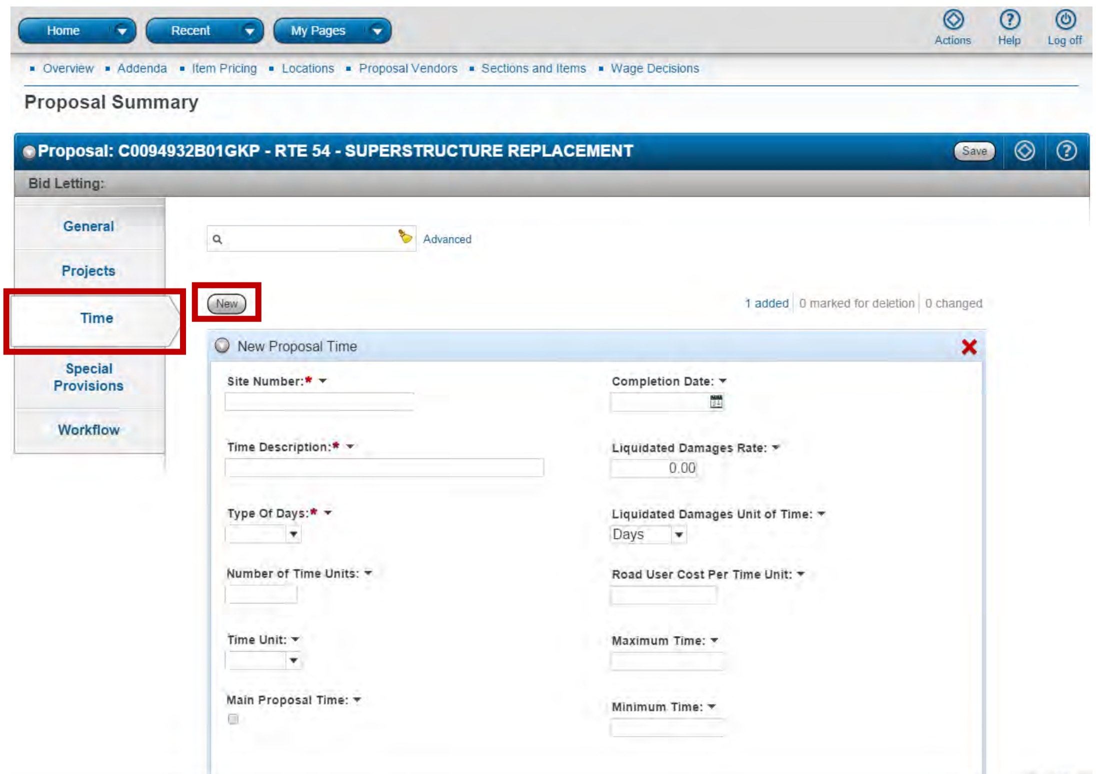


Figure 8 – Adding Proposal Time Screen

Field Descriptions:

Site Number: This value will always equal **00**.

Time Description: Type in a description for the record.

Type of Days: From the drop-down menu, select either AD (Available Days), CD (Calendar Days), or DT (Fixed Completion Date).

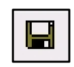
Number of Time Units: If CD was chosen, this field becomes required.

Time Units: The type of unit being measured. Hours or Days

Main Proposal Time: Select this checkbox to represent the main time.

Completion Date: If DT was chosen, this field becomes required.

Road User Cost Per Day: The field is used by Construction Division only. A value entered in this field indicates the Site is a Cost Plus Time Site. Enter the cost per day value (whole number; no dollar sign) to determine the low bidder in a Cost Plus Time bid. A value can only be entered in this field if the selection in the **Type of Days** field is CD. The value is the cost per day (dollar amount) of the inconvenience of the construction.



9.5 Setting Proposal Workflow

A proposal's workflow can be changed by clicking on the Workflow tab. Click in the workflow field and select **VDOT WORKFLOW PROJECT-PROPOSAL-CONTRACT** and click in the WorkflowPhase field and select **PROPOSAL DEFINITION PHASE**. Once these are selected click the **Save** button.

Workflow Phase Definitions

Project Definition Phase	Engineers / Designers Use
Proposal Definition Phase	Construction Division / Select District Staff / District SAPP Coordinators
Advertisement Phase	Construction Division Use Only
Addenda Phase	Construction Division Use Only
Bid Letting Phase	Construction Division Use Only
Post Bid Evaluation Phase	Construction Division Use Only
Preconstruction has ended Phase	Construction Division Use Only
Moved to Construction/SiteManager	Construction Division Use Only
Historical Phase	Construction Division Use Only

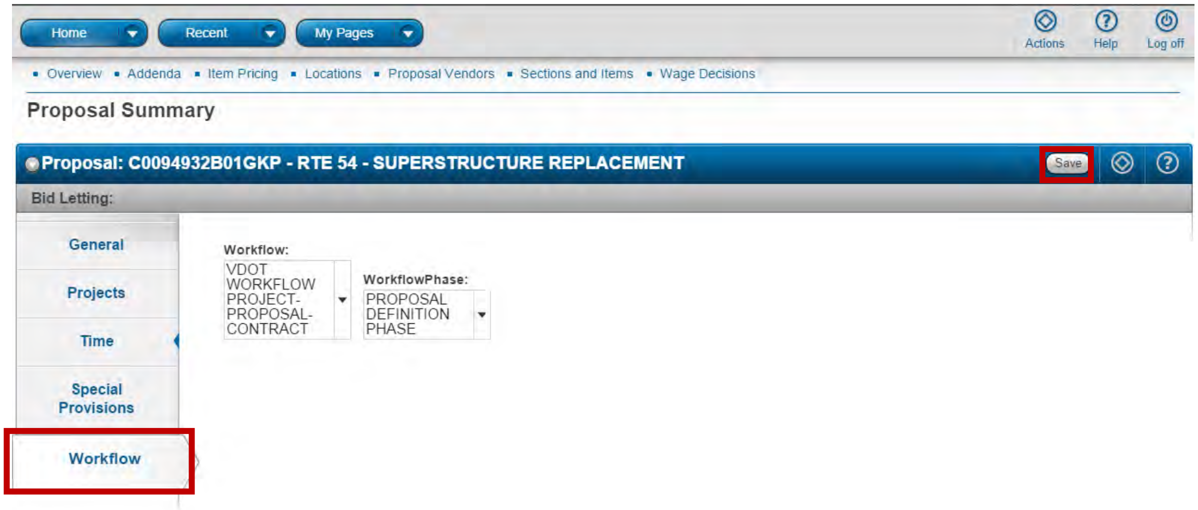


Figure 9 – Setting Proposal Workflow Screen

9.6 Specifying Section and Line Numbers

When you create a proposal that consists of more than one project and generate section and line numbers, Trns·port combines the projects and project items in the following way:

- If you have selected the Combine With Like Items checkbox in the Project item, each item will appear once because Trns·port combines them into single proposal line items, even if they are in different categories or projects. Bidders can then bid on a single item. In order for non-standard items to combine, the Description (Non-std) and Spec Book (Non-std) information must be exactly the same.
- If you have not selected the Combine With Like Items checkbox, that item will not be combined.
- Because bidders will not bid on non-bid items (you select the Non-Bid checkbox on the project item), non-bid items will be omitted from the proposal report.
- After Trns·port combines like items, it assigns unique proposal line numbers, then updates every database item record to reflect the proposal line item number to which the record now belongs.

To create a section and line numbers, start by finding your proposal in the list on the Proposal Overview Screen. Click the Proposal ID to bring you to the General Tab of the Proposal.

Click the **Sections and Items** quick link at the top of the page to take you to the Proposal sections and items page.

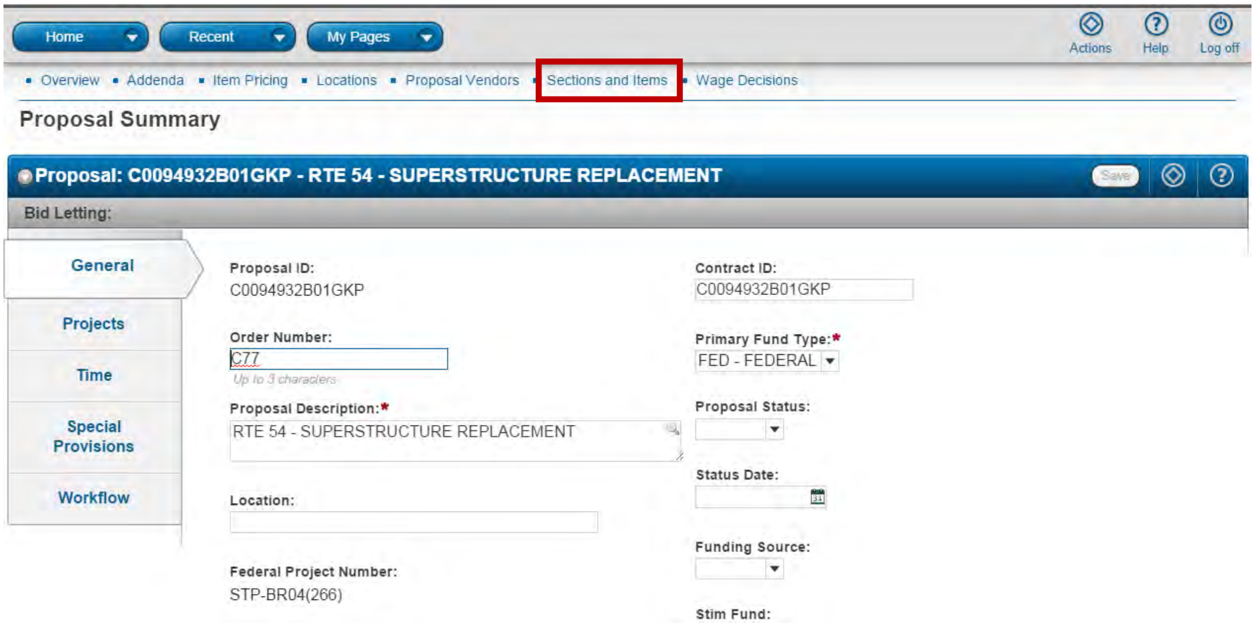


Figure 10 – Proposal Summary Screen

Add a Section by filling in the fields Section ID with **0001** and a Description of **ALL PROJECT ITEMS**. Once this is done, click the Save button. A Save Complete message will appear.

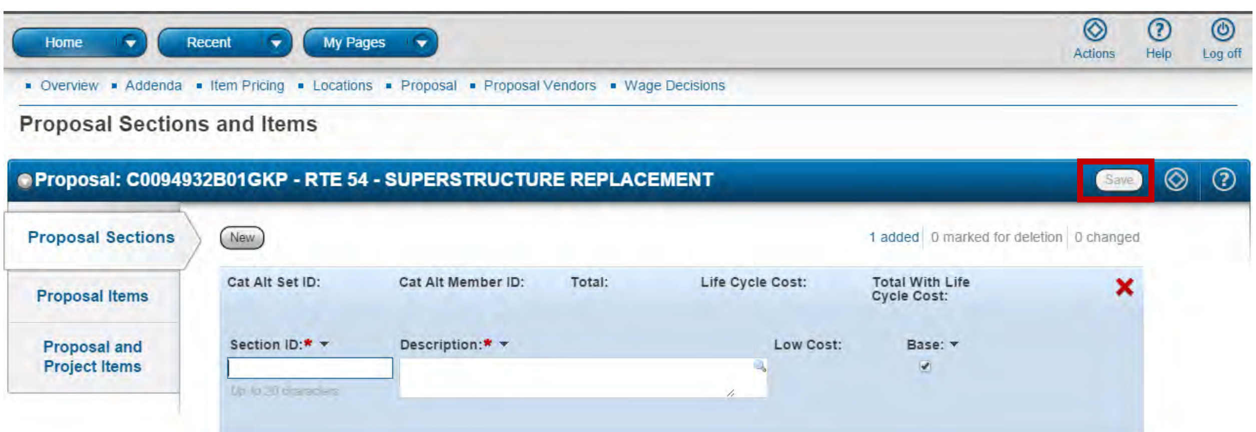


Figure 11 – Adding Proposal Section Screen

Now you will add the project items to this section. To do this, click the Proposal Actions Button and select **Assign Items to Sections** from the list.

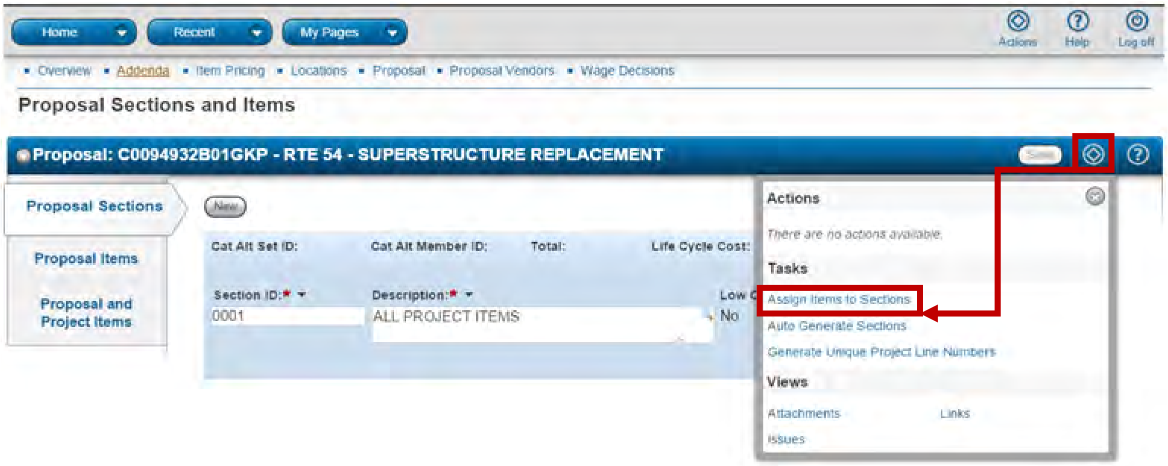


Figure 12 – Proposal Sections and Items Screen

This will take you to the Assign Items to Sections page. Here you can select the project items that you wish to be assigned to the Proposal Section. Notice that you can select the project from the list of projects that are associated to the proposal in the drop down or the blue arrow buttons. The **A** button displays beside each project item denoting that you can assign each item to the Proposal Section 0001. To assign all project items to the section, select the **A** button beside All Project Items and click the **Save** button. Note: Except for unusual circumstances, there should be only one section number (0001). For a project with bid options, additional sections (0002) (0003) shall be created with appropriate descriptions.

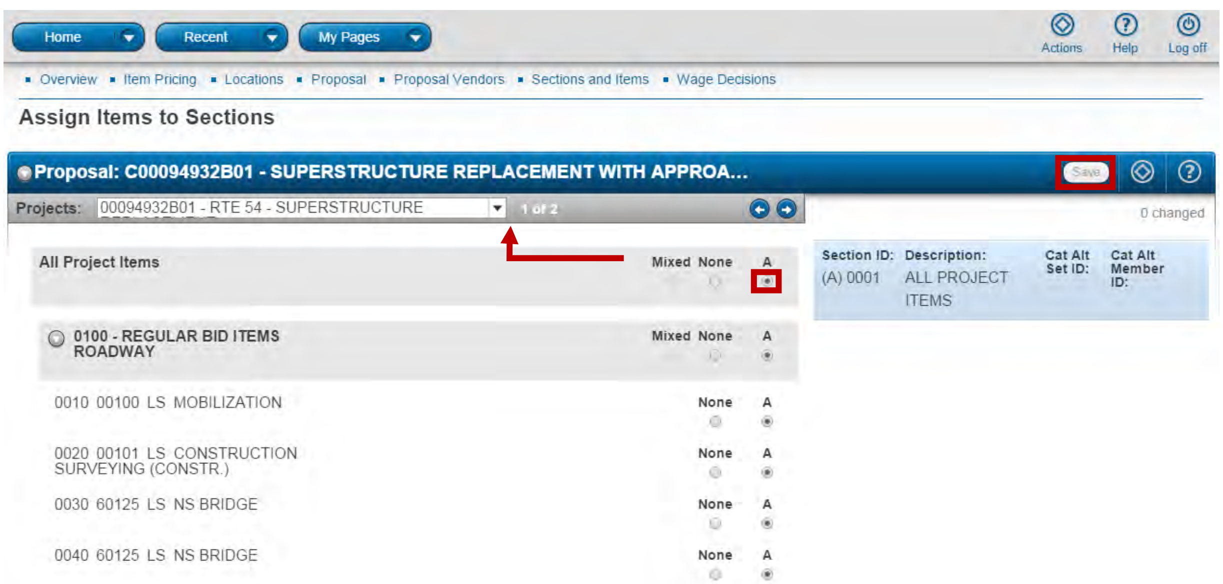


Figure 13 – Assigning Items to Sections Screen

9.7 Copying a Proposal

If you are setting up a new proposal that is similar to another proposal already saved in the database, you can copy the existing proposal and assign it a new proposal ID. You can then make any minor changes required for the new proposal. This saves the time it would take to enter all the proposal-level information.

Instead of having to re-create the proposal for the re-advertisement, you can use the Copy Special command and when asked to name the new proposal, give it the same Contract ID as before with a "B" added at the end.

What about the projects that have been associated to the proposal?

- You do not need to disassociate the projects from the original proposal before copying. Trns·port will leave the projects associated to the original proposal, but show no associated projects on the copied one.

To copy a proposal, find the proposal you wish to copy on the Proposal Overview Screen. Select the proposal row Actions menu and click **Copy** from the list.

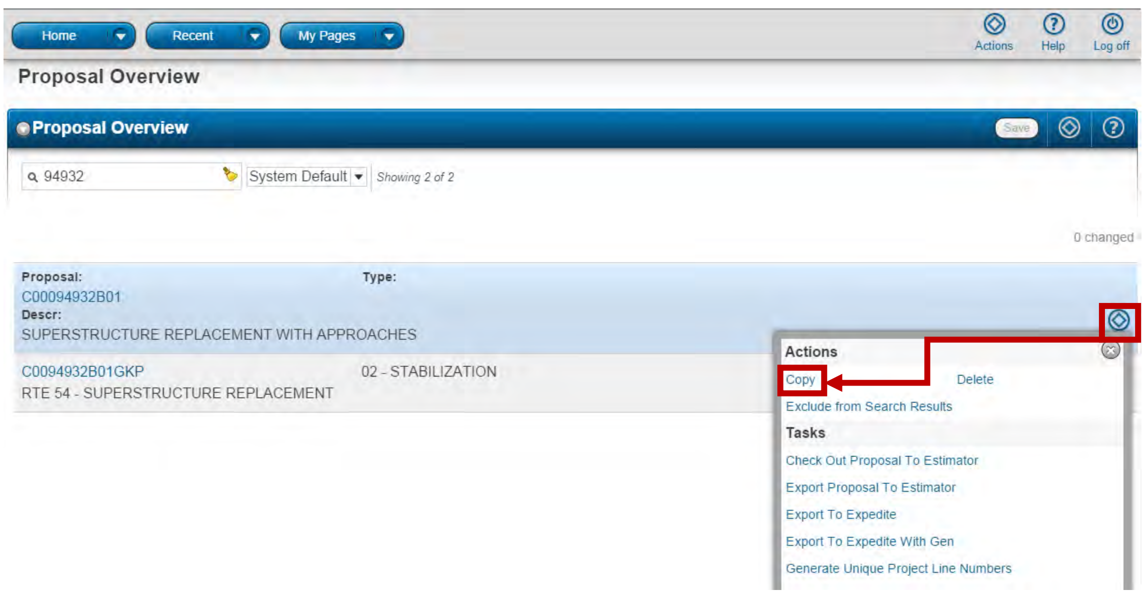


Figure 14 – Proposal Overview Screen

Trns·port displays the Copy Proposal window. Enter a new Proposal ID in the field. The Proposal ID cannot be the same as a Proposal that is already in the database.

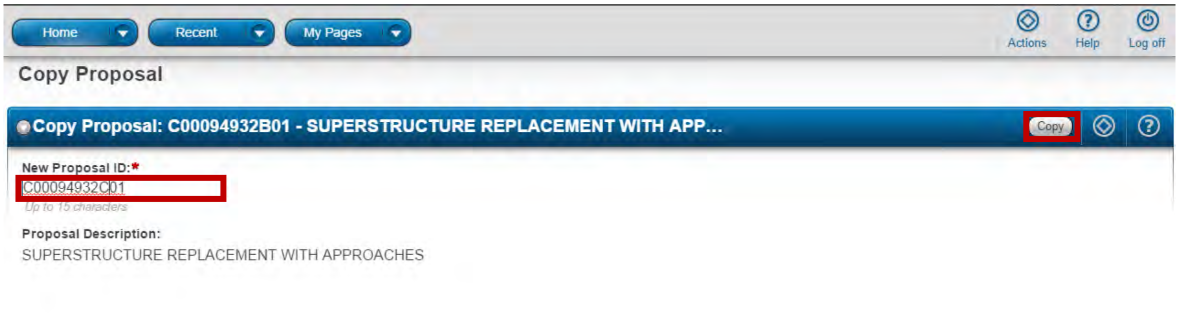


Figure 15 – Copy Proposal Screen

Click the **Copy** button once you have entered a new proposal ID. A Saved Complete message will display and you will be taken to the new proposal General Tab. Note that no projects are associated to the new proposal.

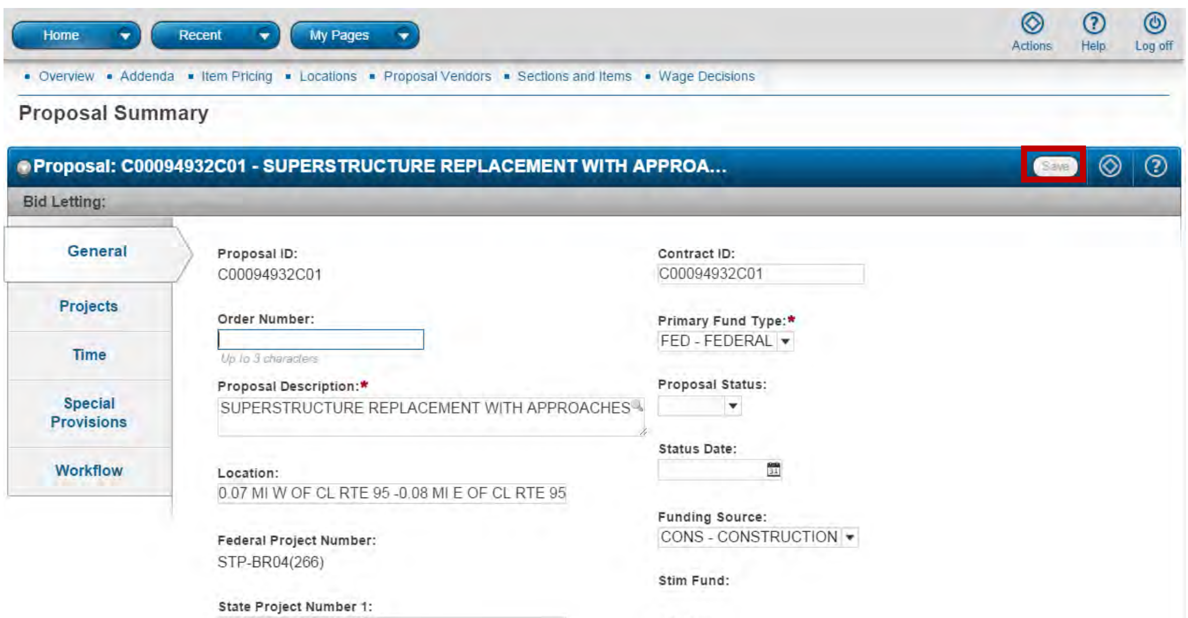


Figure 16 – Copied Proposal Summary Screen

9.8 Generating Bid-Based Prices for Proposal

The Price Proposal Items component allows you to change the estimated unit price for any proposal item.

If you are on the Proposal General Tab, click the **Item Pricing** quick link at the top of the page. This takes to the Price Proposal Items screen where you can see all items that are associated to the proposal. You can click any Actions button to generate a price based on historical bids or you can manually change the price of a single item. You can also generate bid-based prices for all items in the proposal or all items in a section at once.

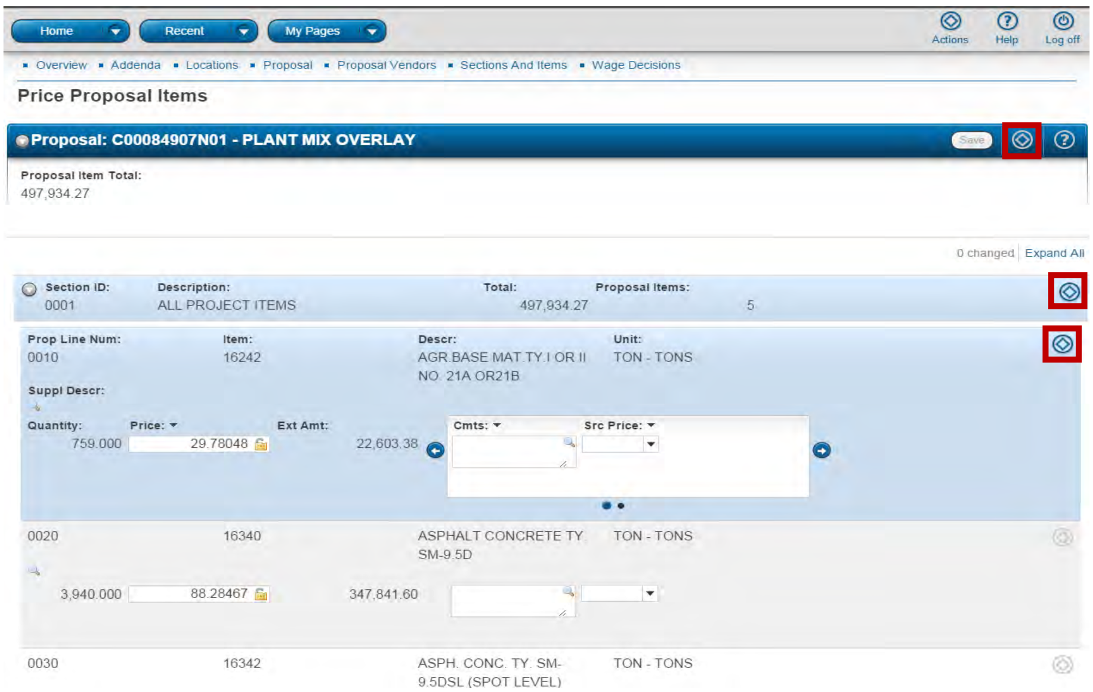


Figure 17 – Price Proposal Items Screen

To manually change the price of a proposal item, click in the Price field, and type the new price. Notice that a lock is displayed in the Price field. If the lock is closed you cannot change the price until you unlock the item and save the estimate. When you modify a proposal item price and save your change, several updates take place:

- The system sets the Est Type field for that item to Ad Hoc.
- The new price, estimation type, and pricing comments are automatically updated in the associated project items.
- The extended amount is recalculated for the proposal item and the associated project items.
- The total price for the proposal is updated and for the associated projects.

9.9 Generating the Proposal Price Schedule Reports

The Proposal Price Schedule report has the options to display the Proposal Cover Page, Schedule of Items, Proposal Estimate, DBE Interest Report, Fuel Sheet, Steel Sheet, Major Items, and Merge Data Sheet.

From the Proposal Overview Screen, search for your proposal. Once you have found it, click the row Actions button to display a list of actions and reports to choose from. Select **Proposal Price Schedule** VDOT from this list.

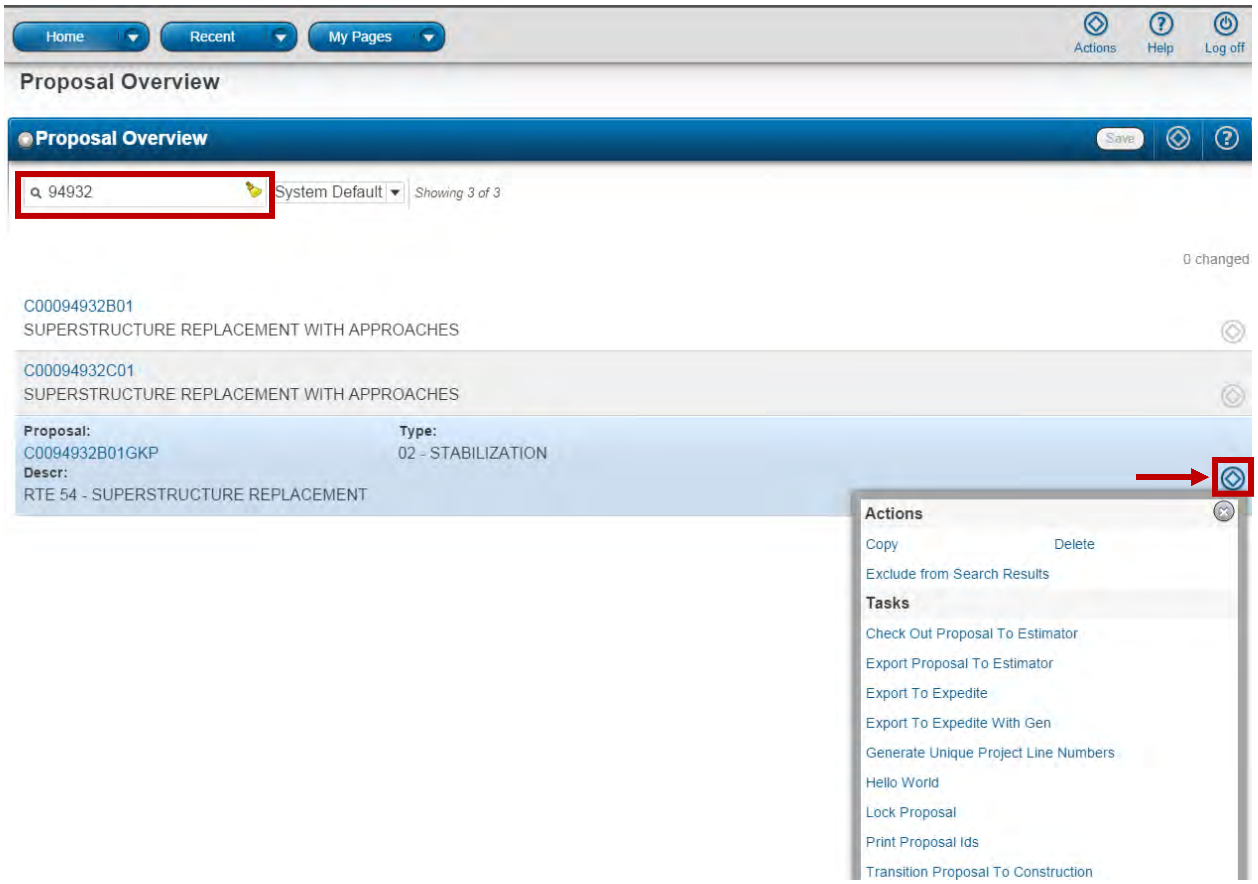


Figure 18 – Proposal Overview Screen

From the Generate Report menu, you will see that there are multiple options that you can choose to be in the Proposal Price Schedule. Once you have selected the options you wish to include, click the **Execute** button.

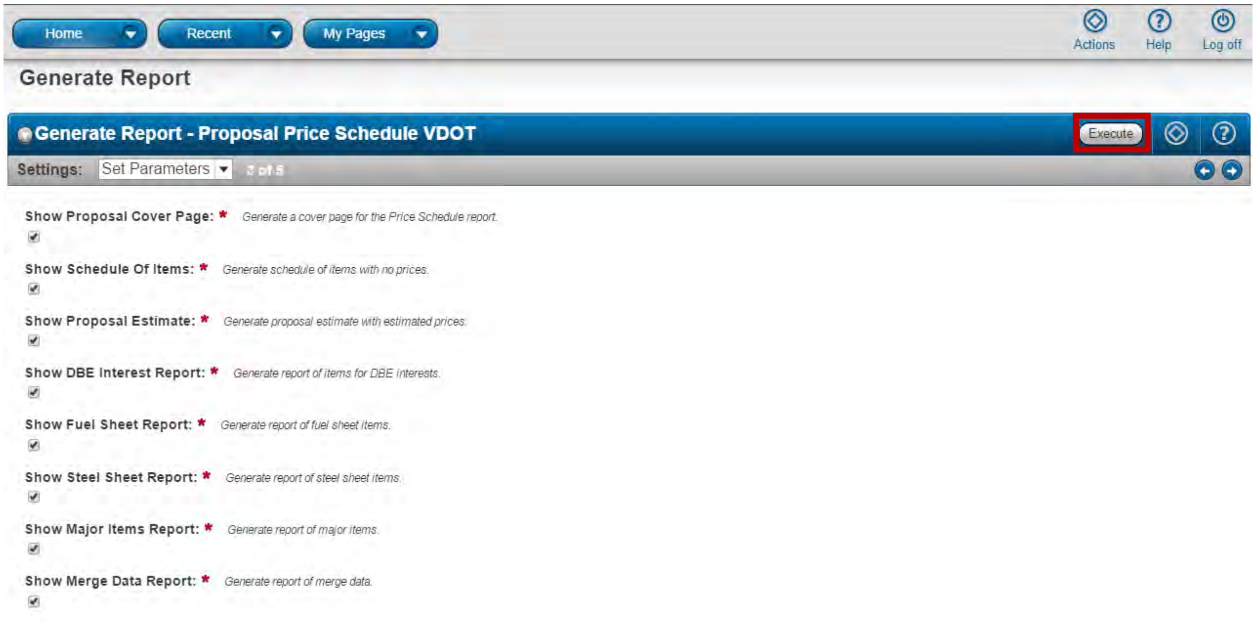
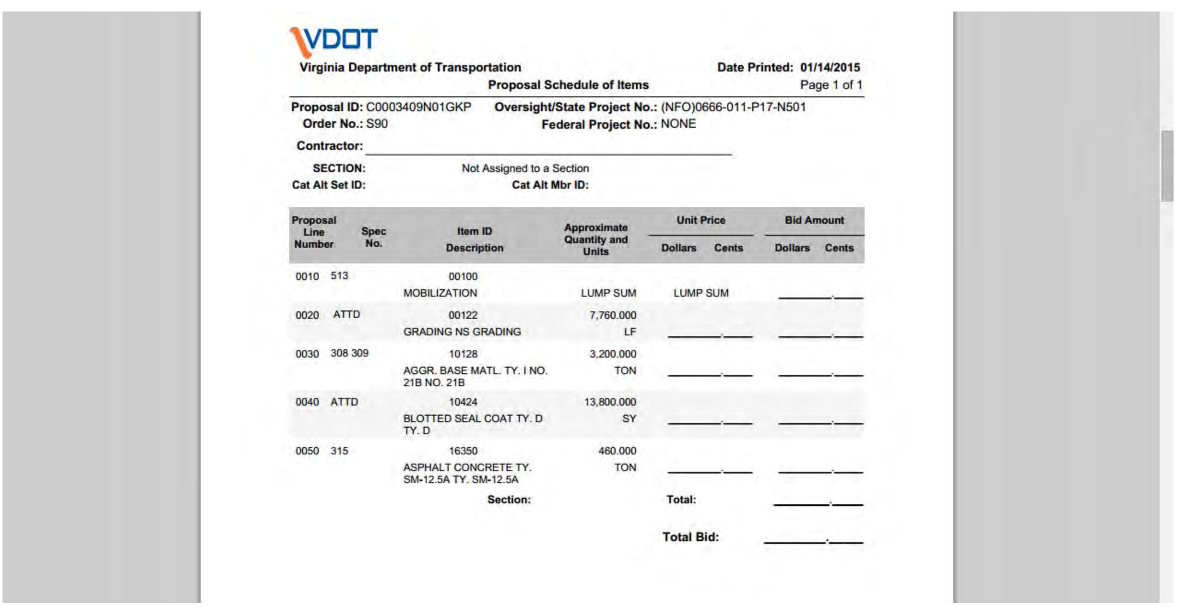


Figure 19 – Generate Proposal Price Schedule Screen

A new internet window will display the report and you can save the report as a pdf. Note that the report is not stored in the system. If you do not save the report before you close the internet browser, you will not be able to view it again unless you regenerate the report.


VDOT
Virginia Department of Transportation Date Printed: 01/14/2015
Proposal Schedule of Items Page 1 of 1
Proposal ID: C0003409N01GKP Oversight/State Project No.: (NFO)0666-011-P17-N501
Order No.: S90 Federal Project No.: NONE
Contractor:
SECTION: Not Assigned to a Section
Cat Alt Set ID: Cat Alt Mbr ID:

Proposal Line Number	Spec No.	Item ID Description	Approximate Quantity and Units	Unit Price Dollars Cents	Bid Amount Dollars Cents
0010	513	00100 MOBILIZATION	LUMP SUM	LUMP SUM	
0020	ATTD	00122 GRADING NS GRADING	7,760.000 LF		
0030	308 309	10128 AGGR. BASE MATL. TY. I NO. 21B NO. 21B	3,200.000 TON		
0040	ATTD	10424 BLOTTED SEAL COAT TY. D TY. D	13,800.000 SY		
0050	315	16350 ASPHALT CONCRETE TY. SM-12.5A TY. SM-12.5A	460.000 TON		

Section: Total:
Total Bid:

Figure 20 – Price Proposal Schedule Screen

9.10 Deleting the Proposal

Because a proposal record contains several levels of associated information, deleting a proposal can have serious consequences. For this reason, the system allows you to choose between two delete options to control how much information is deleted when you delete the proposal. These options are:

- **Delete**— Clicking this button deletes the proposal header information and **removes the association of all projects,** proposal vendors, and proposal times from the proposal. The projects and reference vendors remain in the database.

- **Delete Including Projects** — **CAUTION HERE Clicking this button deletes the proposal record and all of the projects that are associated with the proposal.** The project-level information that is deleted includes all project items, categories, locations, and fund packages. Proposal vendors and proposal times are also deleted.

On the Proposal Overview component, select **Delete** from the **Actions** menu on the proposal's row.

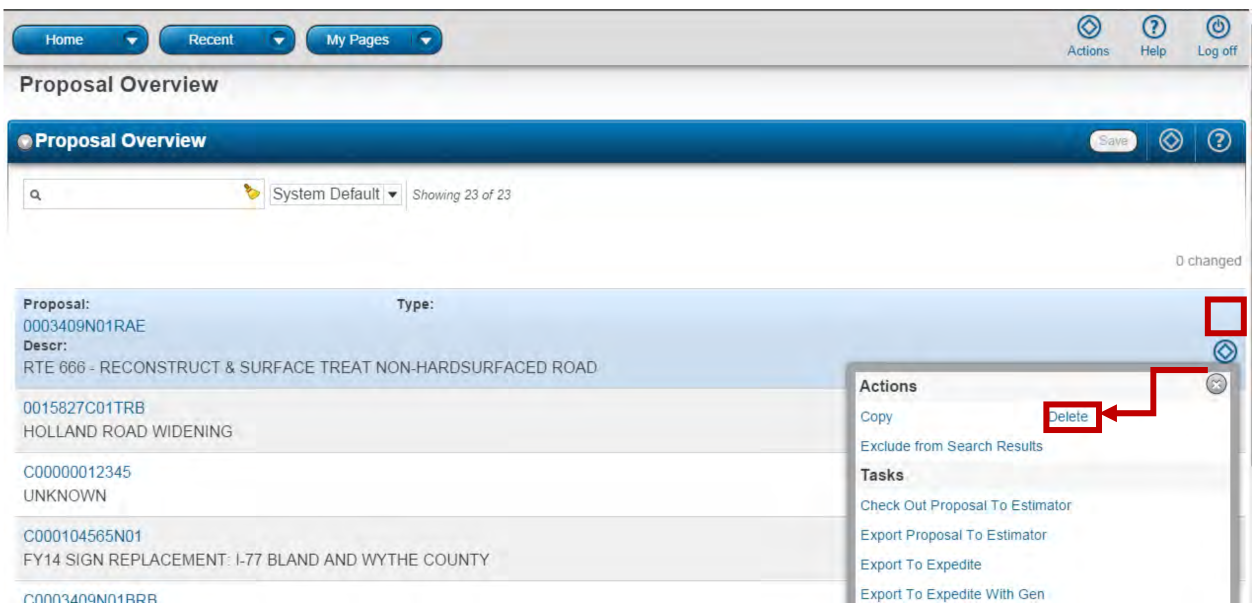


Figure 21 – Delete Proposal Screen

Select the option that you wish to perform

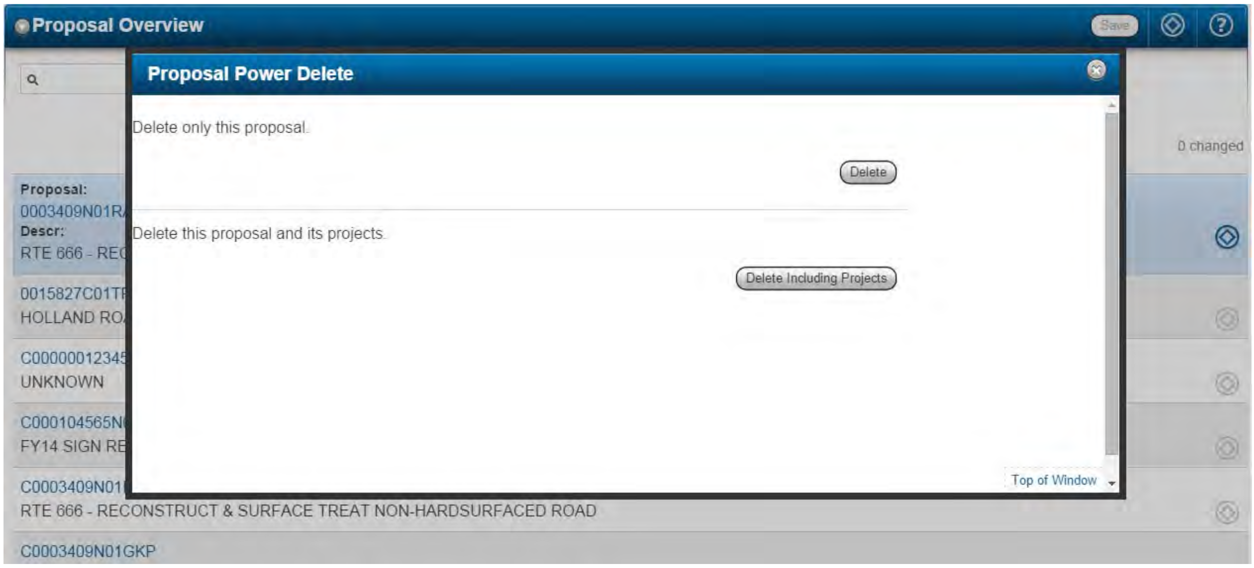


Figure 21 – Delete Proposal Screen

9.11 Proposal Addendums

After a proposal has been advertised, subsequent changes to proposal information that affect contractor bidding (such as proposal times, items, or special provisions) must be tracked and distributed to the proposal vendors. This is accomplished by adding addenda to the proposal. Before you can add an addendum to a proposal, the proposal must be in the addenda phase of the workflow.

From the Proposal **General Tab**, select the **Addenda** quick link. This will take you to the Addendum Summary page. Add an addendum by adding values to the **Description** and **Comments** fields. Once these fields are filled in, click the **Save** button.

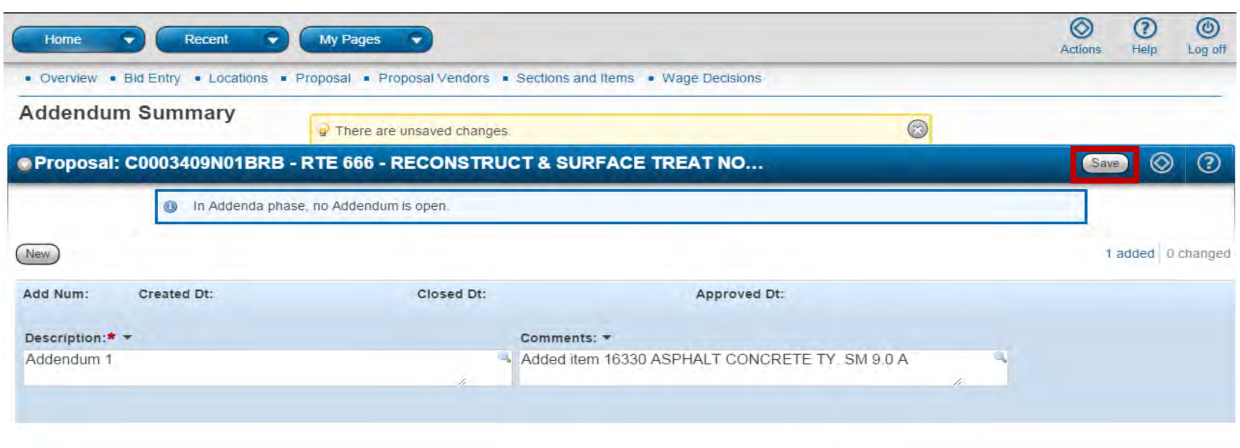


Figure 22 – Addendum Summary Screen

Select the Actions menu and select **Open**. A message will display Addendum Successfully Opened.

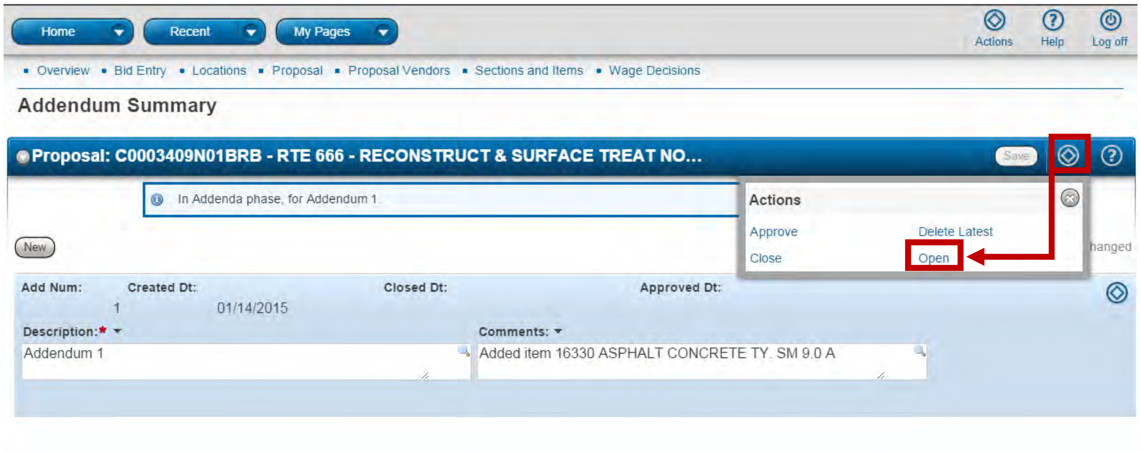


Figure 23 – Addendum Summary Screen

To add the updates to the proposal, go to the project that has the associated items that you wish to update. If you wish to add an item, select the **New** button on the Project Category and Item Summary. Add the required fields along with the Quantity and Estimated Unit Price. Note that when adding items with addenda the **Proposal Item Line Number** must be entered on the New Project Item screen. Click the **Save** button once you have added all item fields.

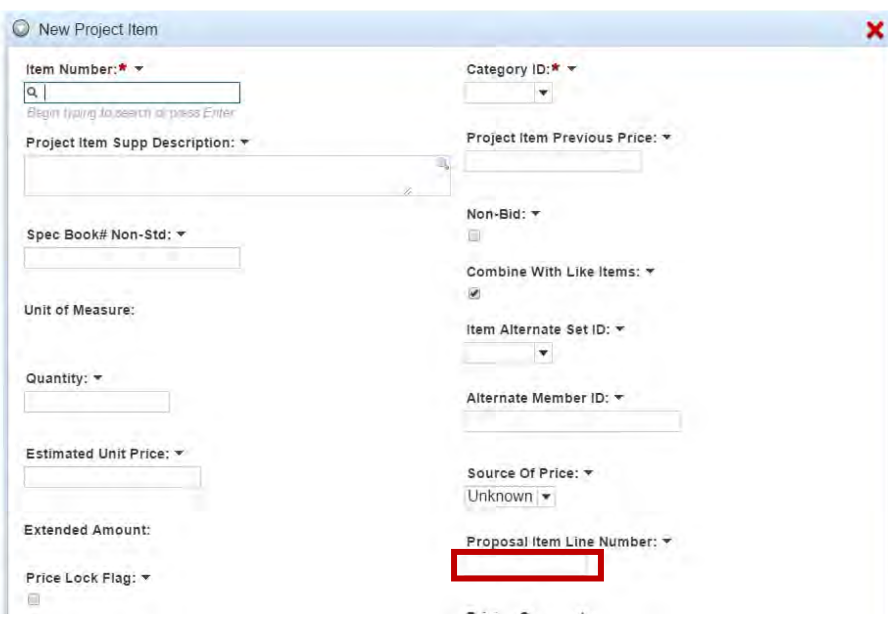


Figure 24 – Adding Project Items Screen

Once you have updated the items at the project level, return to the Addendum Summary to close and approve the addenda.

10 MANAGING BID LETTINGS

Before the bid letting takes place, a bid letting row (based on the date) must be created in the system to manage all the information associated with the letting. Some of the information in a bid letting includes: proposals that will be let, vendors that have purchased proposal plans, proposals that are postponed or removed from the letting, and bids that have been submitted for proposals in the letting. The Bid Letting Overview component is the gateway to managing all of the information in a bid letting. To access the Bid Letting Overview component, click the **Lettings** link in the Preconstruction component.

10.1 Add Bid Letting Package

To create a new bid letting, click the **Lettings** link in the Preconstruction component, and then select **Add** from the **Actions** menu on the Bid Letting Overview component header.

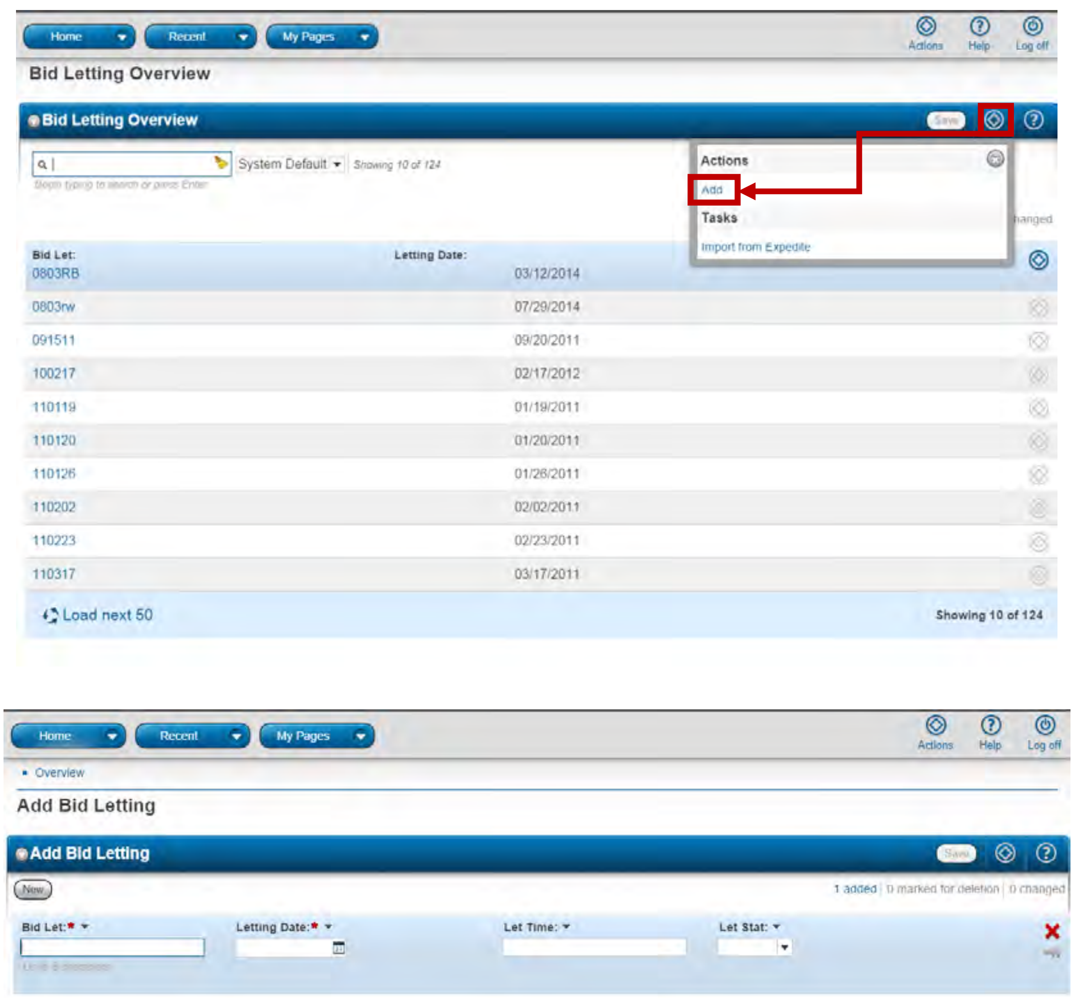


Figure 1 – Adding Bid Letting Screen

Enter information in these fields as needed:

.

Bid Letting ID: This ID is based on the date determined by the Construction Division. Format YY/MM/DD. These include Regular, Special and Emergency Bid Lettings.

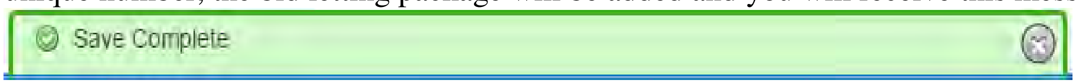
Letting Date: Enter the date in MM/DD/YYYY format or use the calendar icon to select.

Let Time: Enter **10:00 AM**.

Let Status: Select the drop-down menu and select **SCHD-SCHEDULED**.

Click on the **Save** button to add the bid letting to the database, or click on the **New** button if you wish to add another bid letting.

- If you have completed all required field criteria satisfactorily and the Letting Number is a unique number, the bid letting package will be added and you will receive this message:



- If a required field was not filled-in or incorrect data entered at a field which is supported with a reference table, a warning window will display with information. For example, if you left a required field blank or entered invalid data, you will see an **Error** message giving information as to what field was left blank or contains an invalid value:

10.2 Change Bid Letting

Click the **Lettings** link in the Preconstruction component to open the Bid Letting Overview Screen. In the search box, type the Bid Letting ID for the letting you wish to change. Once you find the letting, click the Bid Letting ID blue hyperlink to take you to the letting General Tab.

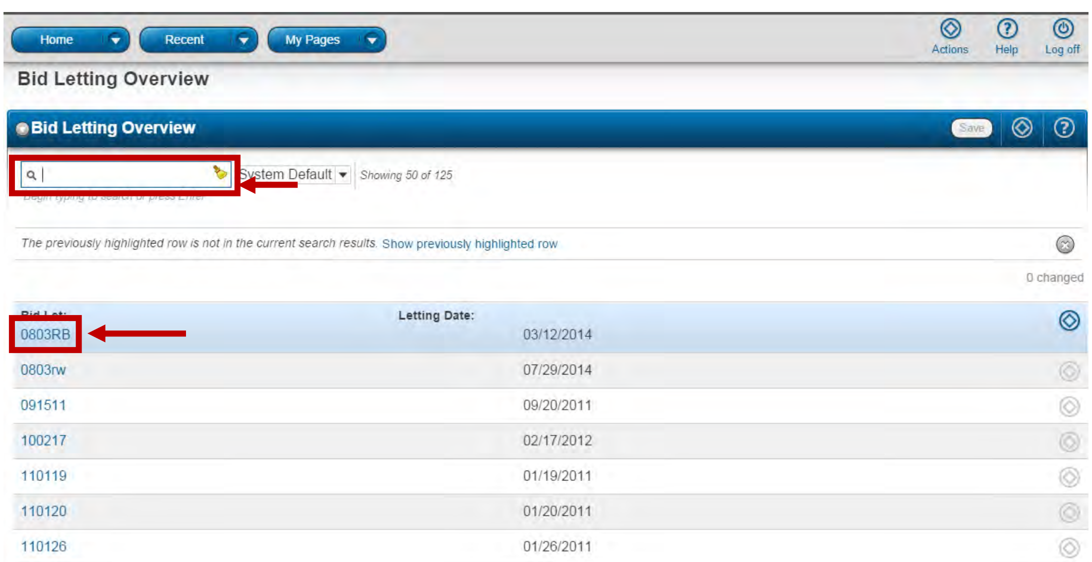


Figure 2 – Bid Letting Overview Screen

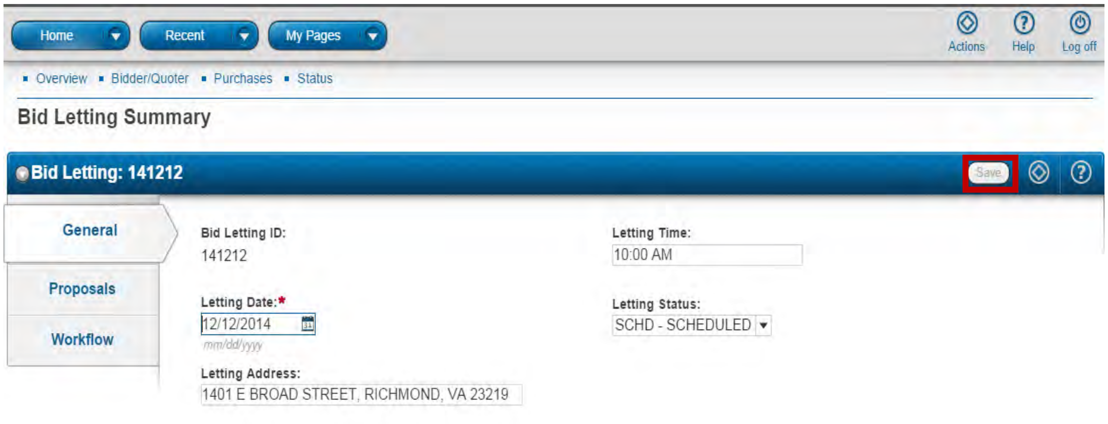


Figure 3 – Bid Letting Summary Screen

The Bid Letting details are shown on the General Tab. These fields can be edited by clicking in the fields and changing the field values. Once these values are changed, click the Save button to save changes. Note that the Bid Letting ID field cannot be changed.

10.3 Assigning the Proposal to a Bid Letting

Once you have selected the letting from the Bid Letting Overview Screen, click the Proposals Tab to add proposals to the bid letting.

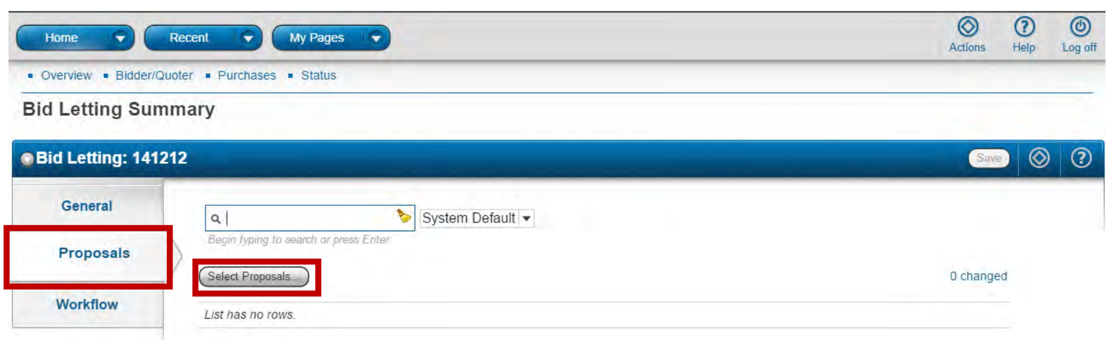


Figure 4 – Proposals Assigned to Letting Screen

If no proposals are assigned to the bid letting, the message *List has no rows* will be displayed on the Proposals Tab.

To add Proposals, click 

. A list of proposals will display in another window.

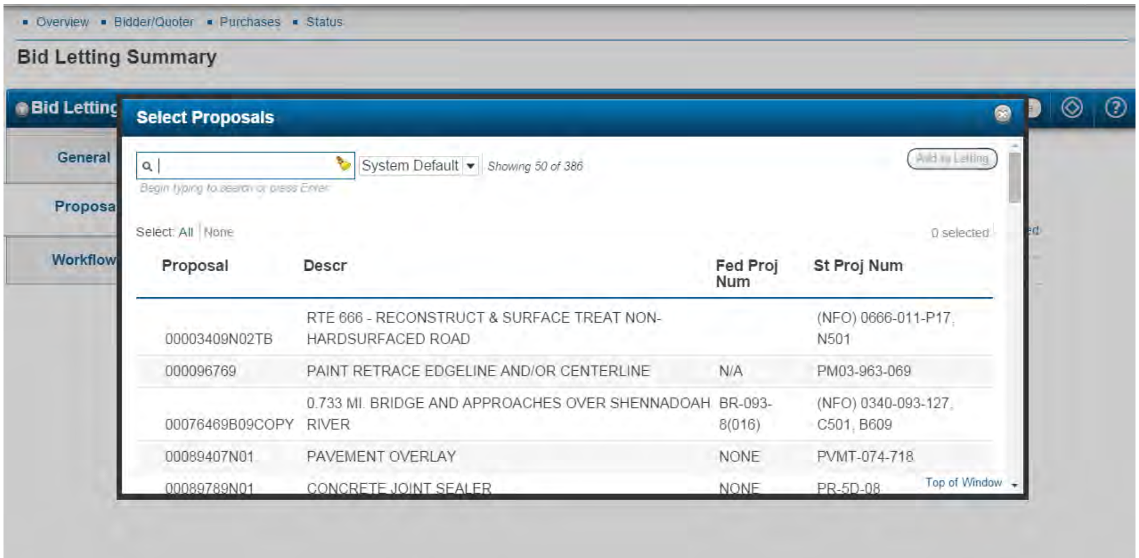


Figure 5 – Assign Proposals to Letting Screen

Once you find the proposal you want to add, click the proposal. The proposal will display a green checkmark to the left of the number and will become highlighted in light blue.

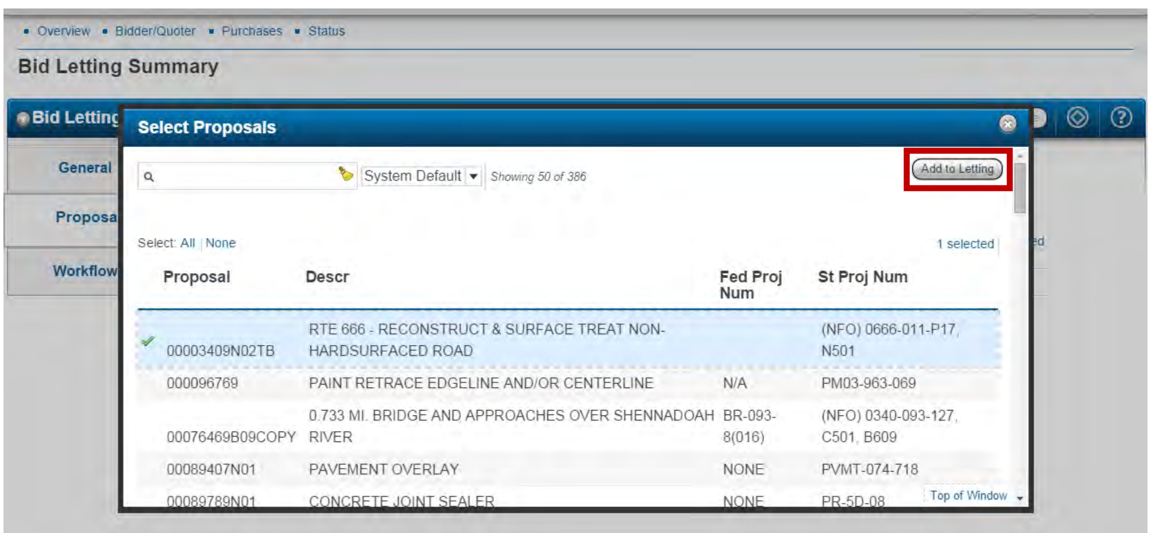


Figure 6 – Select Proposals Screen

Once highlighted, click the 

button to finish assigning the proposal to the bid letting.

Fill in the Order Number and Proposal Status fields before clicking the Save button.

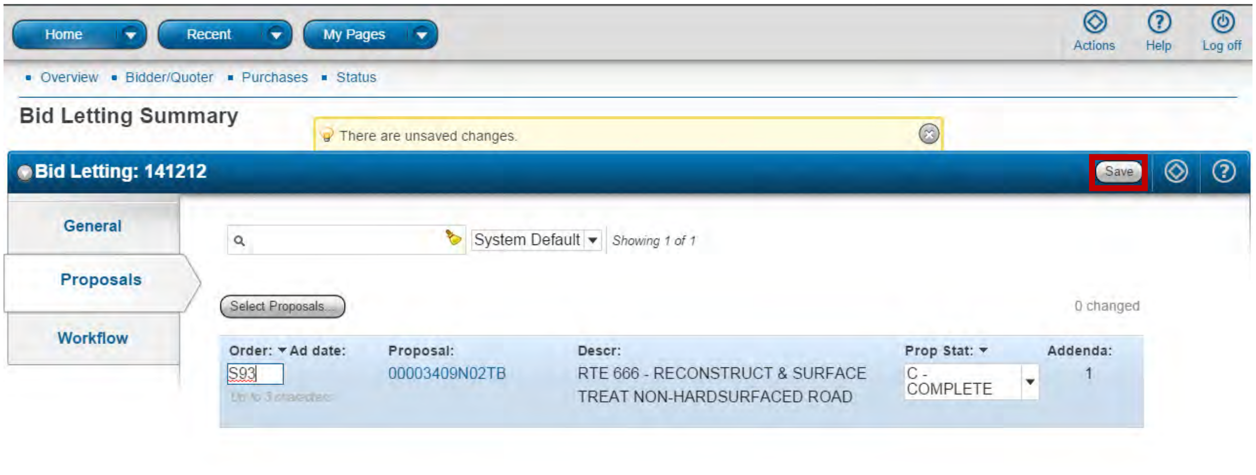


Figure 7 – Proposals Tab Screen

10.4 Delete Bid Letting Package

Click the **Lettings** link in the Preconstruction component to open the Bid Letting Overview Screen. In the search box, type the Bid Letting ID for the letting you wish to change. Once you find the letting, select the row actions button to display the list of actions.

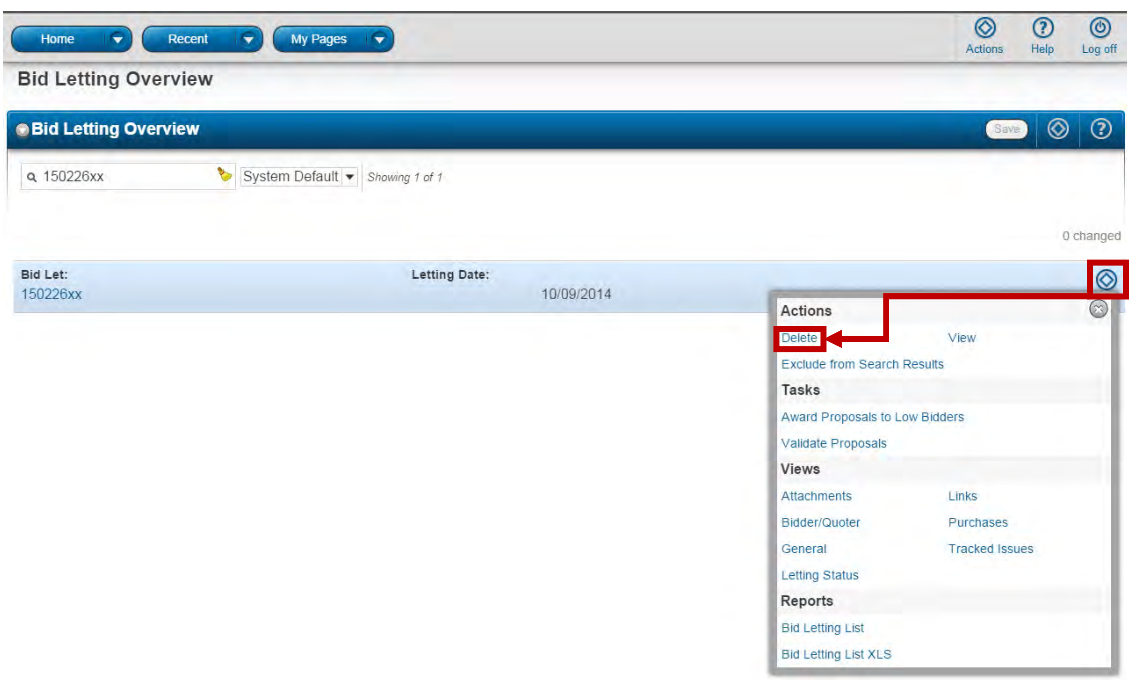


Figure 8 – Bid Letting Overview Screen

Select **Delete** from the list of actions. A window will display and provide three choices for deleting.

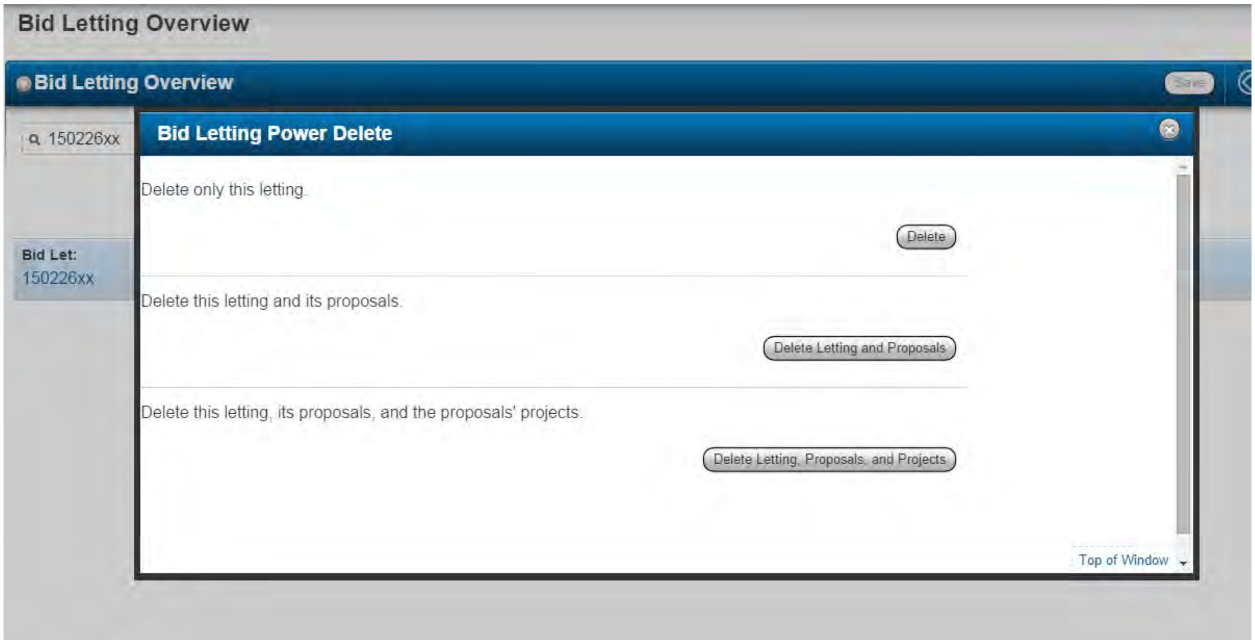


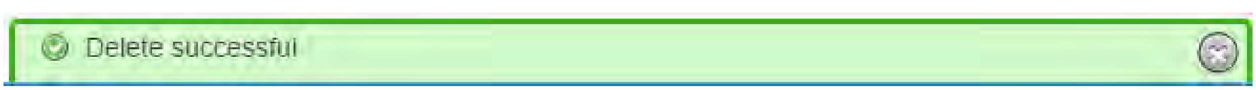
Figure 8 – Delete Bid Letting Screen

- Deletes only the bid letting package.

– Deletes the bid letting package and the proposals associated to it.

(**<u>DO NOT USE</u>**) – Deletes the bid letting package, the proposals associated to it, and all project, category, funding and item information for the projects assigned to the proposals in the selected letting.

Click on the button you desire. Once the bid letting is deleted a save complete message will display.

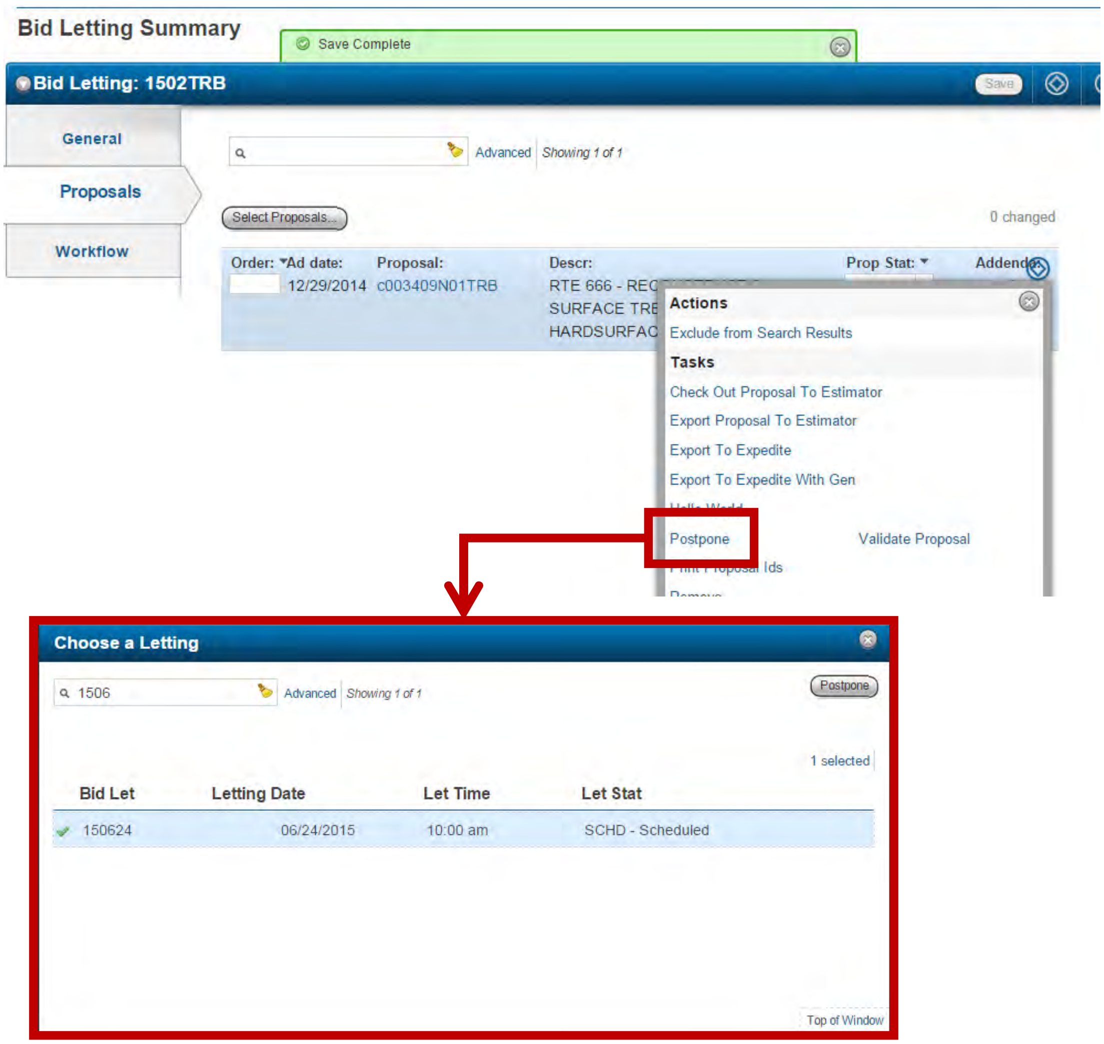


10.4 Delay a Proposal/Call in a Letting

The Bid Letting Administrator (BA) is responsible Delaying a Proposal/Call in a Letting. The BA will receive official notification (Delay Letter) from the Contract Administrator (CA) and will move the Proposal to the new Letting Date.

To Delay a Proposal, perform the following steps:

1. Navigate to Lettings
2. Open the Letting
3. Click Proposal tab
4. Select the Row Action button for the Proposal/Call to Delay
5. Select **Postpone**
6. Enter the new Letting Date in the search box
7. Select the New Letting
8. Select Postpone



APPENDIX A – PROJECT ID NUMBER

The format of the Project ID for various types of projects is as follows:

A.1 Projects with UPC Numbers

The 12-character **Project ID** is composed of the following:

Position		Explanation
1-9	=	UPC (iPM) Number, with leading zeroes
10	=	Type of Project: C – L&D (Construction) D – Drainage Structures over 20' in length B – Bridge H – Hydraulics L – Environmental R – Right of Way T – Traffic Engineering U – Utilities X – Maintenance (Regular Project using Maintenance Funds) N – No Plan M – Minimum Plan
11-12	=	For Constr., Bridge, etc. The last two digits of the fourth part of the project number, following the C, B, R, etc. (Ex: for C503 project, enter 03 in positions 11 & 12 for B622 project, enter 22 in positions 11 & 12)

Examples of PCN for Projects with UPC Numbers:

000003941C03 (C503 project for UPC# 3941)
000015492B01 (B601 project for UPC# 15492)
000006793R01 (R201 project for UPC# 6793)

A.2 Maintenance Projects & SAAP Projects

The 13-character Project ID is composed of the following:

Position		Explanation
1	=	M (for Maintenance-funded)
2	=	1 – Bristol 2 – Salem 3 – Lynchburg 4 – Richmond 5 – Hampton Roads 6 – Fredericksburg 7 – Culpeper 8 – Staunton 9 – Northern Virginia
3-4	=	Year EX. 10 or 11
5-6	=	Project Type = ST – Surface Treatment SS – Slurry Seal LM – Latex Modified PM – Plant Mix
5-6	=	Schedule Letter – A, B, C, etc.
8-13	=	5 Digit Unique UPC with leading zeros

A unique UPC is set up for each county, for each system. The District Maintenance Engineer will assist in determining the Project ID for your project.

Examples of Project ID for Maintenance & SAAP Projects:

M203STA039611
M803LMA029606

A.3 District Originated or Urban Projects (Non-IPM Projects)

The 12-character Project ID is composed of the following:

Position		Explanation
1-2	=	BR – Bristol SA – Salem LY – Lynchburg RC – Richmond SU – Hampton Roads FR – Fredericksburg CU – Culpeper ST – Staunton NV – Northern Virginia UR – Urban
3-12	=	Assigned by Districts or Local Assistance Division

A.4 Prime Project ID and Contract ID

Both the Prime Project ID and the Contract ID begin with a C and end with the Project ID of the largest project.

Example 1: Projects are	000003942C01
	000003942B01
	000003942B02
Prime Project =	**C**000003942C01
Contract ID =	C000003942C01

Example 1: Projects are	M803CMA039606
	M803CMA039720
Prime Project =	**C**M803CMA039606
Contract ID =	CM803CMA039606

Note: The C is <u>added</u> to the Project ID. It does not replace the first digit.

APPENDIX B – ITEM CODE INDEX

BRIDGE ITEMS

BRIDGE SUPERSTRUCTURE...60000-63999
BRIDGE SUBSTRUCTURE...64000-66999
BRIDGE INCIDENTALS 67000-67999

STRUCTURAL WIDENING OR REPAIR

SUPERSTRUCTURE..68000-68999
SUBSTRUCTURE 69000-69999

RIGHT OF WAY ITEMS..70000-72000

CONTRACT ADJUSTMENTS..80000-99999

LUMP SUM CONSTRUCTION ENGINEERING………………………………….25580
Category 3001

LUMP SUM CONTRACT REQUIREMENTS…………………..…………………25585
Category 3002

LUMP SUM CONTRACT CONTINGENCY…………………...…………………25590
Category 3003

APPENDIX C – CONVERSION CHART (COUNTY)

COUNTY - DISTRICT - RESIDENCY CONVERSION CHART

County Name	County Code	District No.	Residency
Arlington	C000	9	Fairfax
Accomack	C001	5	Accomac
Albemarle	C002	7	Charlottesville
Alleghany	C003	8	Lexington
Amelia	C004	4	Amelia
Amherst	C005	3	Amherst
Appomattox	C006	3	Appomattox
Augusta	C007	8	Verona
Bath	C008	8	Lexington
Bedford	C009	2	Bedford
Bland	C010	1	Tazewell
Botetourt	C011	2	Salem
Brunswick	C012	4	South Hill
Buchanan	C013	1	Lebanon
Buckingham	C014	3	Dillwyn
Campbell	C015	3	Appomattox
Caroline	C016	6	Bowling Green
Carroll	C017	2	Hillsville
Charles City	C018	4	Sandston
Charlotte	C019	3	Halifax
Chesterfield	C020	4	Chesterfield
Clarke	C021	8	Luray
Craig	C022	2	Salem
Culpeper	C023	7	Culpeper
Cumberland	C024	3	Dillwyn
Dickenson	C025	1	Wise
Dinwiddie	C026	4	Petersburg
Elizabeth City	C027 *	5	Tidewater Toll
Essex	C028	6	Bowling Green
Fairfax	C029	9	Fairfax
Fauquier	C030	7	Warrenton
Floyd	C031	2	Hillsville
Fluvanna	C032	7	Louisa
Franklin	C033	2	Rocky Mount
Frederick	C034	8	Edinburg
Giles	C035	2	Christiansburg
Gloucester	C036	6	Saluda
Goochland	C037	4	Ashland

County Name	County Code	District No.	Residency
Grayson	C038	1	Wytheville
Greene	C039	7	Charlottesville
Greensville	C040	5	Franklin
Halifax	C041	3	Halifax
Hanover	C042	4	Ashland
Henrico	C043	4	Sandston
Henry	C044	2	Martinsville
Highland	C045	8	Verona
Isle of Wight	C046	5	Suffolk
James City	C047	5	Williamsburg
King George	C048	6	Fredericksburg
King and Queen	C049	6	Saluda
King William	C050	6	Bowling Green
Lancaster	C051	6	Warsaw
Lee	C052	1	Jonesville
Loudoun	C053	9	Leesburg
Louisa	C054	7	Louisa
Lunenburg	C055	4	Amelia
Madison	C056	7	Culpeper
Mathews	C057	6	Saluda
Mecklenburg	C058	4	South Hill
Middlesex	C059	6	Saluda
Montgomery	C060	2	Christiansburg
Nansemond	C061 *	5	Suffolk
Nelson	C062	3	Amherst
New Kent	C063	4	Sandston
Norfolk	C064 *	5	Norfolk
Northampton	C065	5	Accomac
Northumberland	C066	6	Warsaw
Nottoway	C067	4	Amelia
Orange	C068	7	Culpeper
Page	C069	8	Luray
Patrick	C070	2	Martinsville
Pittsylvania	C071	3	Chatham
Powhatan	C072	4	Chesterfield
Prince Edward	C073	3	Dillwyn
Prince George	C074	4	Petersburg
Princess Anne	C075 *	5	Norfolk
Prince William	C076	9	Manassas
Pulaski	C077	2	Christiansburg
Rappahannock	C078	7	Warrenton
Richmond	C079	6	Warsaw
Roanoke	C080	2	Salem
Rockbridge	C081	8	Lexington

County Name	County Code	District No.	Residency
Rockingham	C082	8	Harrisonburg
Russell	C083	1	Lebanon
Scott	C084	1	Jonesville
Shenandoah	C085	8	Edinburg
Smyth	C086	1	Abingdon
Southampton	C087	5	Franklin
Spotsylvania	C088	6	Fredericksburg
Stafford	C089	6	Fredericksburg
Surry	C090	5	Waverly
Sussex	C091	5	Waverly
Tazewell	C092	1	Tazewell
Warren	C093	8	Luray
Warwick	C094 *	5	Williamsburg
Washington	C095	1	Abingdon
Westmoreland	C096	6	Warsaw
Wise	C097	1	Wise
Wythe	C098	1	Wytheville
York	C099	5	Williamsburg

*Counties 27, 61, 64, 75 & 94 are no longer counties. These numbers are still used in cases where work is being done in the locations they designate.

Districtwide	County Code	District No.
Bristol	C961	1
Salem	C962	2
Lynchburg	C963	3
Richmond	C964	4
Hampton Roads	C965	5
Fredericksburg	C966	6
Culpeper	C967	7
Staunton	C968	8
Northern VA	C96A	9

APPENDIX D – CONVERSION CHART (CITY)

CITY - DISTRICT - RESIDENCY – COUNTY CONVERSION CHART

City Code	City Name	District No.	Residency	County Code
100	Alexandria	9	Fairfax	C000
101	Big Stone Gap	1	Wise	C097
102	Bristol	1	Abingdon	C095
103	Buena Vista	8	Lexington	C081
104	Charlottesville	7	Charlottesville	C002
105	Clifton Forge	8	Lexington	C003
106	Colonial Heights	4	Chesterfield	C020
107	Covington	8	Lexington	C003
108	Danville	3	Chatham	C071
109	Emporia	5	Franklin	C040
110	Falls Church	9	Fairfax	C029
111	Fredericksburg	6	Fredericksburg	C088
112	Front Royal	8	Luray	C093
113	Galax	2	Hillsville	C017
114	Hampton	5	Tidewater Toll Fac.	C027
115	Harrisonburg	8	Harrisonburg	C082
116	Hopewell	4	Petersburg	C074
117	Lexington	8	Lexington	C081
118	Lynchburg	3	Appomattox	C015
119	Marion	1	Abingdon	C086
120	Martinsville	2	Martinsville	C044
121	Newport News	5	Williamsburg	C094
122	Norfolk	5	Norfolk	C064
123	Petersburg	4	Petersburg	C026
124	Portsmouth	5	Norfolk	C064
125	Pulaski	2	Christiansburg	C077
126	Radford	2	Christiansburg	C060
127	Richmond	4	Chesterfield	C020
128	Roanoke	2	Salem	C080
129	Salem	2	Salem	C080
130	South Boston	3	Halifax	C041
131	Chesapeake	5	Norfolk	C064
132	Staunton	8	Verona	C007
133	Suffolk	5	Suffolk	C061
134	Virginia Beach	5	Norfolk	C075
136	Waynesboro	8	Verona	C007
137	Williamsburg	5	Williamsburg	C047
138	Winchester	8	Edinburg	C034

City Code	City Name	District No.	Residency	County Code
139	Wytheville	1	Wytheville	C098
140	Abingdon	1	Abingdon	C095
141	Bedford	2	Bedford	C009
142	Blackstone	4	Amelia	C067
143	Bluefield	1	Tazewell	C092
144	Farmville	3	Dillwyn	C073
145	Franklin	5	Franklin	C087
146	Norton	1	Wise	C097
147	Poquoson	5	Williamsburg	C099
148	Richlands	1	Tazewell	C092
149	Vinton	2	Salem	C080
150	Blacksburg	2	Christianburg	C060
151	Fairfax	9	Fairfax	C029
152	Manassas Park	9	Manassas	C076
153	Vienna	9	Fairfax	C029
154	Christiansburg	2	Christiansburg	C060
155	Manassas	9	Manassas	C076
156	Warrenton	7	Warrenton	C030
157	Rocky Mount	2	Rocky Mount	C033
158	Tazewell	1	Tazewell	C092
159	Luray	8	Luray	C069
160	Accomac	5	Accomac	C001
161	Alberta	4	South Hill	C012
162	Altavista	3	Appomattox	C015
163	Amherst	3	Amherst	C005
164	Appalachia	1	Wise	C097
165	Appomattox	3	Appomattox	C006
166	Ashland	4	Ashland	C042
167	Belle Haven	5	Accomac	C001
168	Berryville	8	Luray	C021
169	Bloxom	5	Accomac	C001
170	Boones Mill	2	Rocky Mount	C033
171	Bowling Green	6	Bowling Green	C016
172	Boyce	8	Luray	C021
173	Boydton	4	South Hill	C058
174	Boykins	5	Franklin	C087
175	Branchville	5	Franklin	C087
176	Bridgewater	8	Harrisonburg	C082
177	Broadway	8	Harrisonburg	C082
178	Brodnax	4	South Hill	C012/58
179	Brookneal	3	Appomattox	C015
180	Buchanan	2	Salem	C011
181	Burkeville	4	Amelia	C067
182	Cape Charles	5	Accomac	C065

City Code	City Name	District No.	Residency	County Code
183	Capron	5	Franklin	C087
184	Cedar Bluff	1	Tazewell	C092
185	Charlotte C.H.	3	Halifax	C019
186	Chase City	4	South Hill	C058
187	Chatham	3	Chatham	C071
188	Cheriton	5	Accomac	C065
189	Chilhowie	1	Abingdon	C086
190	Chincoteague	5	Accomac	C001
191	Claremont	5	Waverly	C090
192	Clarksville	4	South Hill	C058
193	Cleveland	1	Lebanon	C083
194	Clifton	9	Fairfax	C029
195	Clinchport	1	Jonesville	C084
196	Clintwood	1	Wise	C025
197	Clover	3	Halifax	C041
198	Coeburn	1	Wise	C097
199	Colonial Beach	6	Warsaw	C096
200	Columbia	7	Louisa	C032
201	Courtland	5	Franklin	C087
202	Craigsville	8	Verona	C007
203	Crewe	4	Amelia	C067
204	Culpeper	7	Culpeper	C023
205	Damascus	1	Abingdon	C095
206	Dayton	8	Harrisonburg	C082
207	Dendron	5	Waverly	C090
208	Dillwyn	3	Dillwyn	C014
209	Drakes Branch	3	Halifax	C019
210	Dublin	2	Christiansburg	C077
211	Duffield	1	Jonesville	C084
212	Dumfries	9	Manassas	C076
213	Dungannon	1	Jonesville	C084
214	Eastville	5	Accomac	C065
215	Edinburg	8	Edinburg	C085
216	Elkton	8	Harrisonburg	C082
217	Exmore	5	Accomac	C065
218	Fincastle	2	Salem	C011
219	Floyd	2	Hillsville	C031
220	Fries	1	Wytheville	C038
221	Gate City	1	Jonesville	C084
222	Glade Spring	1	Abingdon	C095
223	Glasgow	8	Lexington	C081
224	Glen Lyn	2	Christiansburg	C035
225	Gordonsville	7	Culpeper	C068
226	Goshen	8	Lexington	C081

City Code	City Name	District No.	Residency	County Code
227	Gretna	3	Chatham	C071
228	Grottoes*	8	Verona	C007
228	Grottoes*	8	Harrisonburg	C082
229	Grundy	1	Lebanon	C013
230	Halifax	3	Halifax	C041
231	Hallwood	5	Accomac	C001
232	Hamilton	9	Leesburg	C053
233	Haymarket	9	Manassas	C076
234	Haysi	1	Wise	C025
235	Herndon	9	Fairfax	C029
236	Hillsboro	9	Leesburg	C053
237	Hillsville	2	Hillsville	C017
238	Holland	5	Suffolk	C061
239	Honaker	1	Lebanon	C083
240	Independence	1	Wytheville	C038
241	Iron Gate	8	Lexington	C003
242	Irvington	6	Warsaw	C051
243	Ivor	5	Franklin	C087
244	Jarratt	5	Franklin	C040
244	Jarratt	5	Waverly	C091
245	Jonesville	1	Jonesville	C052
246	Keller	5	Accomac	C001
247	Kenbridge	4	Amelia	C055
248	Keysville	3	Halifax	C019
249	Kilmarnock	6	Warsaw	C051/66
250	La Crosse	4	South Hill	C058
251	Lawrenceville	4	South Hill	C012
252	Lebanon	1	Lebanon	C083
253	Leesburg	9	Leesburg	C053
254	Louisa	7	Louisa	C054
255	Lovettsville	9	Leesburg	C053
256	Madison	7	Culpeper	C056
257	McKenney	4	Petersburg	C026
258	Melfa	5	Accomac	C001
259	Middleburg	9	Leesburg	C053
260	Middletown	8	Edinburg	C034
261	Mineral	7	Louisa	C054
262	Monterey	8	Verona	C045
263	Montross	6	Warsaw	C096
264	Mt. Crawford	8	Harrisonburg	C082
265	Mt. Jackson	8	Edinburg	C085
266	Narrows	2	Christiansburg	C035
267	Nassawadox	5	Accomac	C065
268	New Castle	2	Salem	C022

City Code	City Name	District No.	Residency	County Code
269	New Market	8	Edinburg	C085
270	Newsoms	5	Franklin	C087
271	Nickelsville	1	Jonesville	C084
272	Occoquan	9	Manassas	C076
273	Onancock	5	Accomac	C001
274	Onley	5	Accomac	C001
275	Orange	7	Culpeper	C068
276	Painter	5	Accomac	C001
277	Pamplin City*	3	Dillwyn	C073
277	Pamplin City*	3	Appomattox	C006
278	Parksley	5	Accomac	C001
279	Pearisburg	2	Christiansburg	C035
280	Pembroke	2	Christiansburg	C035
281	Pennington Gap	1	Jonesville	C052
282	Phenix	3	Halifax	C019
283	Pocahontas	1	Tazewell	C092
284	Port Royal	6	Bowling Green	C016
285	Pound	1	Wise	C097
286	Purcellville	9	Leesburg	C053
287	Quantico	9	Manassas	C076
288	Remington	7	Warrenton	C030
289	Richcreek	2	Christiansburg	C035
290	Ridgeway	2	Martinsville	C044
291	Round Hill	9	Leesburg	C053
292	Rural Retreat	1	Wytheville	C098
293	Saint Charles	1	Jonesville	C052
294	Saint Paul	1	Wise	C097
295	Saltville	1	Abingdon	C086/95
305	Stony Creek	5	Waverly	C091
306	Strasburg	8	Edinburg	C085
296	Saxis	5	Accomac	C001
297	Scottsburg	3	Halifax	C041
298	Scottsville*	7	Charlottesville	C002
298	Scottsville*	7	Louisa	C032
299	Shenandoah	8	Luray	C069
300	Smithfield	5	Suffolk	C046
301	South Hill	4	South Hill	C058
302	Stanardsville	7	Charlottesville	C039
303	Stanley	8	Luray	C069
304	Stephens City	8	Edinburg	C034
307	Stuart	2	Martinsville	C070
308	Surry	5	Waverly	C090
309	Tangier	5	Accomac	C001
310	Tappahannock	6	Bowling Green	C028

City Code		City Name	District No.	Residency	County Code
311		The Plains	7	Warrenton	C030
312		Timberville	8	Harrisonburg	C082
313		Toms Brook	8	Edinburg	C085
314		Troutdale	1	Wytheville	C038
315		Troutville	2	Salem	C011
316		Urbanna	6	Saluda	C059
317		Victoria	4	Amelia	C055
318		Virgilina	3	Halifax	C041
319		Wachapreague	5	Accomac	C001
320		Wakefield	5	Waverly	C091
321		Warsaw	6	Warsaw	C079
322		Washington	7	Warrenton	C078
323		Waverly	5	Waverly	C091
324		Weber City	1	Jonesville	C084
325		West Point	6	Bowling Green	C050
326		Whaleyville	5	Suffolk	C061
327		White Stone	6	Warsaw	C051
328		Windsor	5	Suffolk	C046
329		Wise	1	Wise	C097
330		Woodstock	8	Edinburg	C085
331		Hurt	3	Chatham	C071
333	**	Collinsville	2	Martinsville	C044
335	**	Quantico Station	9	Manassas	C076
338	**	West Gate	9	Manassas	C076
339		Clinchco	1	Wise	C025

* A county line runs through these cities. The use of two county (and two residency) codes is coupled only with secondary roads projects. For all other purposes, the county with the lowest number is used.

** Unincorporated Urban Places

APPENDIX E – PROJECT WORK TYPES

CODE **DESCRIPTION**

BDO	BRIDGE DECK OVERLAY
BDR	BRIDGE DECK REPLACEMENT
BN	BRIDGE NEW
BWR	BRIDGE WIDENING & REPAIR
CBC	CONSTRUCTION NEW BOX CULVERT
CDA	CONSTRUCTION DEMOLITION/ABATEMENT
CITS	CONSTRUCTION DEMOLITION/ABATEMENT
CNA	CONSTRUCTION NEW ALIGNMENT
CTL	CONSTRUCTION NEW TURN LANES
CUE	CONSTRUCTION UPGRADE EXISTING LANES
CW	CONSTRUCTION WIDENING (ADDING LANES)
CWM	CONSTRUCTION WETLAND MITIGATION/LANDSCAP
MAR	MAINT ASPHALT PLANT MIX RESURFACING
MBD	MAINTENANCE BR SUPERST REPAIR/ REHAB
MBSB	MAINTENANCE BR SUBSTRUCTURE REPAIR/REHAB
MG	MAINTENANCE GUARDRAIL
MPAR	MAINTENANCE PAVEMENT REPAIRS
MPIR	MAINTENANCE PIPE REHABILITATION
MPM	MAINTENANCE PAVEMENT MARKING
MRWF	MAINTENANCE RIGHT OF WAY FENCING
MSCG	MAINTENANCE SIDEWALK/CURB & GUTTER
MSIG	MAINENANCE SIGNAGE
MSIN	MAINTENANCE SIGNALS
MSR	MAINTENANCE SLOPE REPAIR
MSS	MAINTENANCE SLURRY SEAL
MST	MAINTENANCE SURFACE TREATMENT

APPENDIX F – FHWA Type Codes

CODE	NAME
01	NEW CONSTRUCTION ROADWAY
03	4R - RECONSTRUCTION- ADDED CAPACITY
04	4R - RECONSTRUCTION-NO ADDED CAPACITY
05	4R - SYSTEM PRESERVATION - RESURFAC
06	4R - RESTORATION & REHABILITATION
07	4R - RELOCATION
08	BRIDGE - NEW CONSTRUCTION
10	BRIDGE - REPLACEMENT-ADDED CAPACITY
11	BRIDGE - REPLACE-NO ADDED CAPACITY
13	BRIDGE - REHAB-ADDED CAPACITY
14	BRIDGE-REHAB-NO ADDED CAPACITY
15	PRELIMINARY ENGINEERING
16	RIGHT OF WAY
17	CONSTRUCTION ENGINEERING
18	PLANNING
19	RESEARCH
20	ENVIRONMENTAL ONLY
21	SAFETY
22	SAFETY - RAIL/HWY CROSSING
23	TRANSIT
24	TRAFFIC MANAGEMENT/ENGINEERING-HOV
25	VEHICLE WEIGHT ENFORCEMENT PROGRAM
26	FERRY BOATS
27	ADMINISTRATION
28	OTHER-FACILITIES FOR PEDS/BIKES
29	OTHER-ACQUISITION OF SCENIC/HISTORY
30	OTHER-SCENIC OR HISTORIC HWY PROGRAM
31	OTHER-LANDSCAPE/SCENIC BEAUTIFY
32	OTHER-HISTORIC PRESERVATION
33	OTHER-REHAB/OPER OF HISTORIC BLDG
34	OTHER-PRESERVATION OF ABANDONED RWY
35	OTHER-CTRL/REMOVAL OUTDOOR ADVERTISE
36	OTHER-ARCHAEOLOGICAL PLAN/RESEARCH
37	OTHER-MITIGATION OF WATER POLLUTION
38	OTHER-SAFETY AND ED FOR PED/BIKE
39	OTHER-ESTABLISHMENT TRANS MUSEUMS
40	OTHER-SPECIAL BRIDGE
41	OTHER-YOUTH CONSERVATION/SERVICE
42	OTHER-TRAINING
43	OTHER-UTILITIES
44	OTHER-OTHER
45	DEBT SERVICE
47	BRIDGE PRESERVATION
48	BRIDGE PROTECTION
49	BRIDGE INSPECTION AND RELATED TRAINING
50	NEW TUNNEL
51	TUNNEL REPLACEMENT
52	TUNNEL REHABILITATION
53	TUNNEL PRESERVATION
54	TUNNEL PROTECTION
55	TUNNEL INSPECTION AND RELATED TRAINING
56	OTHER ASSET INSPECTIONS

FHWA Type Code Descriptions

CODE	NAME	DESCRIPTION
01	New Construction	Construction of a new roadway that will not replace an existing roadway. A new roadway will provide: (1) a roadway where none existing, or (2) an additional and alternate roadway to an existing roadway will remain open and continue to serve through traffic.
03-4R	Reconstruction, Added Capacity	Construction on approximate alignment of an existing route where the old pavement structure is substantially removed and replaced. Such reconstruction includes widening to provide continuous additional through lane(s), or adding, or revising interchanges, replacing other highway elements such as a grade separation to replace an existing grade intersection. Also included, where necessary, are other incidental improvements such as drainage and shoulder improvements.
04-4R	Reconstruction, No added Capacity	Widening the lanes and/or shoulders of an existing roadway without adding through lanes. This may include reconstructing the existing pavement and other incidental improvements such as shoulder and drainage improvements.
05-4R	Resurfacing	Placement of additional surface material over the existing roadway to improve serviceability or to provide additional strength. There may be some upgrading of unsafe features and other incidental work in conjunction with resurfacing. Where surfacing is constructed by a separate project as a final stage of construction, the type of improvement should be the same as that of the preceding stage B new route, relocation, reconstruction, minor widening, etc.
06-4R	Restoration and Rehabilitation	Work required to return existing pavement (including shoulders) to a condition of adequate structural support or to a condition adequate for placement of an additional stage of construction. There may be some upgrading of unsafe features or other incidental work in conjunction with the restoration and rehabilitation. Typical improvements would include replacing spalled or malfunctioning joints; substantial pavement stabilization prior to resurfacing; grinding/grooving of rigid pavements; replacing deteriorated materials; reworking or strengthening bases or sub-bases, and adding under-drains.
07-4R	Relocation	Construction of a roadway at a new location that replaces an existing roadway. The new roadway carries all the through traffic with the previous facility closed or retained as a land–service road only.
08	Bridge, New Construction	Construction of a new bridge that does not replace or relocate an existing bridge.

*Projects using these Improvement Codes must report a National Bridge Inventory (NBI) Structure Number.

CODE	NAME	DESCRIPTION
*10	Bridge Replacement, Added Capacity	Total replacement of a structurally inadequate or functionally obsolete bridge with a new structure constructed with additional lanes in the same general traffic corridor to current geometric construction standards. Incidental roadway approach work is included. The use of this code requires the reporting of the National Bridge Inventory (NBI) structure number in the "Bridge Number" data field.
*11	Bridge Replacement, No Added Capacity	Total replacement of a structurally inadequate or functionally obsolete bridge with a new structure constructed without adding lanes constructed in the same general traffic corridor to current geometric construction standards. A bridge is removed and replaced with a lesser facility is considered a bridge replacement. Incidental roadway approach work is included. The use of this code requires the reporting of the National Bridge Inventory (NBI) structure number in the data field identified Bridge Numbers.
*13	Bridge Rehabilitation, Added Capacity	For the major work required to restore structural integrity of a bridge, as well as, work necessary to correct major safety defects. Bridge deck replacement (both partial and complete) and widening of bridges including addition of through lanes to specified standards are included. Construction of a dual structure to alleviate a capacity deficiency is also included. Work required to correct minor structure and safety defects or deficiencies, such as deck patching, resurfacing, protective systems, upgrading railings, curbs and gutters, and other minor bridge work. If HBRRP funds are involved, the use of this code requires the reporting of the National Bridge Inventory (NBI) structure number in the "Bridge Number" data field.
*14	Bridge Rehabilitation, No Added Capacity	For the major work required to restore structural integrity of a bridge, as well as, work necessary to correct major safety defects. Bridge deck replacement (both partial and complete) and widening of bridges without adding through lanes to specified standards are included. Work required to correct minor structure and safety defects or deficiencies, such as deck patching, resurfacing, protective systems, upgrading railings, curbs or other preventative maintenance items are included. If HBRRP funds are involved, the use of this code requires the reporting of the National Bridge Inventory (NBI) structure number in the “Bridge Number” data field.
**15	Preliminary Engineering	For the preparation of plans, specifications, and estimates (PS&E), traffic, and related studies including field inspections, surveys material testing and borings.
16	Right of Way	For purchase of land, improvements and easements, in addition to the cost of moving and relocating buildings, businesses, and persons.

*Projects using these Improvement Codes must report a National Bridge Inventory (NBI) Structure Number.
**Transportation Enhancement Projects (Program Codes with fund source 33B0, Q220) must use these Improvement Codes.

CODE	NAME	DESCRIPTION
**17	Construction Engineering	Oversight of construction of roadways, structures, and traffic service facilities including additional design work after construction project is let.
18	Planning	For Planning related purposes.
19	Research	For Research related purposes.
20	Environmental Only	For improvements that do not provide any increase in the level of service, in the condition of the facility or in safety features. Typical improvements, which would fall in this category, would be noise barriers, beautification and other environmentally related features not built as a part of any other improvement type. If environmental mitigation is needed as the result of a bridge project, and it is confined to the reasonable touchdown and the bridge itself, then it is allowable with HBRRP funds. Outside the reasonable touchdown would not be considered eligible.
21	Safety	For projects or a significant portion of a project that provides features or devices to enhance safety. For example, expenditures on projects designed to improve the safety of at-grade railroad crossings or for the construction of facilities dedicated to the enforcement of vehicle weight regulations.
22	Rail/Highway Crossing	Improvements to crossing warning Protective Devices such as signs, markings, and cross bucks; flashing light additions/improvements; and improvements to track circuitry.
23	Transit	For transit and transit-related purposes.
24	Traffic Management/Engineering – HOV	Traffic operation improvements that are designed to reduce traffic congestion and to facilitate the flow of traffic, both people and vehicles, on existing systems, or to conserve motor fuels. Include automated toll collection equipment, road and bridge surveillance and control systems, etc.
25	Vehicle Weight Enforcement Program	Vehicle Weight Enforcement Program
26	Ferry Boats	Ferry Boats
27	Administration	Administration for National Recreational Trails Projects, Commercial Vehicles, and other similar projects.
**28	Facilities for Pedestrians and Bicycles	For independent projects (not part of any other Federal-aid Highway project) to construct a facility to accommodate bicycle transportation and pedestrians.
**29	Acquisition of Scenic Easements and Scenic or Historic Sites	For projects consisting of easement and fee-simple purchase of sites of historic significance and/or considered worthy of preserving due their scenic qualities within the view shed of a transportation facility.
**30	Scenic or Historic Highway Programs	For projects consisting of scenic highway program and implementation activities not included in safety and other related improvements.

**Transportation Enhancement Projects (Program Codes with fund source 33B0, Q220) must use these Improvement Codes.

CODE	NAME	DESCRIPTION
**31	Landscaping and Other Scenic Beautification	For projects involving landscaping and other scenic beautification through planting and related work. This includes vegetation management to assure the sustainability of landscape areas.
**32	Historic Preservation	For projects consisting of purchasing and restoring/rehabilitating a building, structure, or facility (other than transportation buildings, structures and facilities) that is directly related to the transportation system.
**33	Rehabilitation and Operation of Historic Transportation Buildings, Structures, or Facilities	For projects consisting of purchasing and restoring/rehabilitating, and/or operating transportation buildings, structures, or facilities considered to be of historic significance.
**34	Preservation of Abandoned Railway Corridors	For projects to preserve an abandoned railway corridor. It is expected that most of these projects will accommodate bicycle and pedestrian use. This code may be used for any railway corridor conversion project including those used by equestrians, skaters, and skiers. Not to be used for National Recreational Trails projects.
**35	Control and Removal of Outdoor Advertising	For projects to purchase outdoor advertising for permanent removal, to remove illegal outdoor advertising, or to develop an outdoor advertising control plan.
**36	Archeological Planning and Research	For projects involving the identification, evaluation, planning, and/or research of historic or archeological planning and research under Transportation Enhancements.
**37	Mitigation of Water Pollution due to Highway Runoff	
**38	Safety and Education for Pedestrians/Bicyclists	
**39	Establishment of Transportation Museums	
**40	Special Bridge	This category includes bridge inventory, inspection and classification and other special bridge projects, such as load posting, not covered by another type of improvement code
**41	Youth Conservation Service	
42	Training	Training, Supportive Services; TRAC; On the Job Training
43	Utilities	Utilities
44	Other	Miscellaneous work such as National Recreational Trails construction, noise barriers, etc.
45	Debt Service	Interest payments and retirement of principal under an eligible bond issue (including capitalized interest) and any other cost incidental to the sale of an eligible bond issue (including issuance costs, insurance or other credit enhancement fees, and other bond-related costs as determined).

*Projects using these Improvement Codes must report a National Bridge Inventory (NBI) Structure Number.

**Transportation Enhancement Projects (Program Codes with fund source 33B0, Q220) must use these Improvement Codes.

BRIDGE IMPROVEMENT TYPES				
Code	Name	Structure Number Required?	Definition	
			Highway Bridge Program Funds	MAP-21 Funds
40	Special Bridge	No	Includes bridge inventory, inspection and classification and other special bridge projects, such as load posting, not covered by another type of improvement code. Also includes application of calcium magnesium acetate, sodium acetate/formate, or other environmentally acceptable, minimally corrosive ant-icing and deicing compositions.	Includes low water crossing replacement, application of calcium magnesium acetate, sodium acetate/formate, or other environmentally acceptable, minimally corrosive anti-icing and deicing compositions, and other eligible bridge projects not covered by another type of improvement code.
47	Bridge Preservation	Yes	Preventative Maintenance activities that are a cost effective means of extending the service life of a bridge.	Activities that prevent, delay, or reduce deterioration of bridges or bridge elements, restore the function of existing bridges, keep bridges in good condition and extend their life.
48	Bridge Protection	Yes	Not Applicable	Includes scour countermeasures, seismic retrofits, impact protection measures, security countermeasures, and protection against extreme events.
49	Bridge Inspection and Related Training	No	Not Applicable	Bridge inspection and evaluation activities, including in-depth and special inspections. Bridge inspection related training.

TUNNEL IMPROVEMENT TYPES			
Code	Name	Structure Number Required?	MAP-21 Funds
50	New Tunnel	No	Construction of a new tunnel that does not replace or relocate an existing tunnel.
51	Tunnel Replacement	Yes	Total replacement of a tunnel with a new structure constructed with additional lanes in the same general traffic corridor.
52	Tunnel Rehabilitation	Yes	For the work required to restore structural integrity of a tunnel, as well as, work necessary to correct major safety defects.
53	Tunnel Preservation	Yes	Activities that prevent, delay, or reduce deterioration of tunnels or tunnel elements, restore the function of existing tunnels, keep tunnels in good condition and extend their life.
54	Tunnel Protection	Yes	Includes impact protection measures, security countermeasures, and protection against extreme events.
55	Tunnel Inspection and Related Training	No	Tunnel inspection and evaluation, including in-depth and other special inspections. Tunnel inspection training.

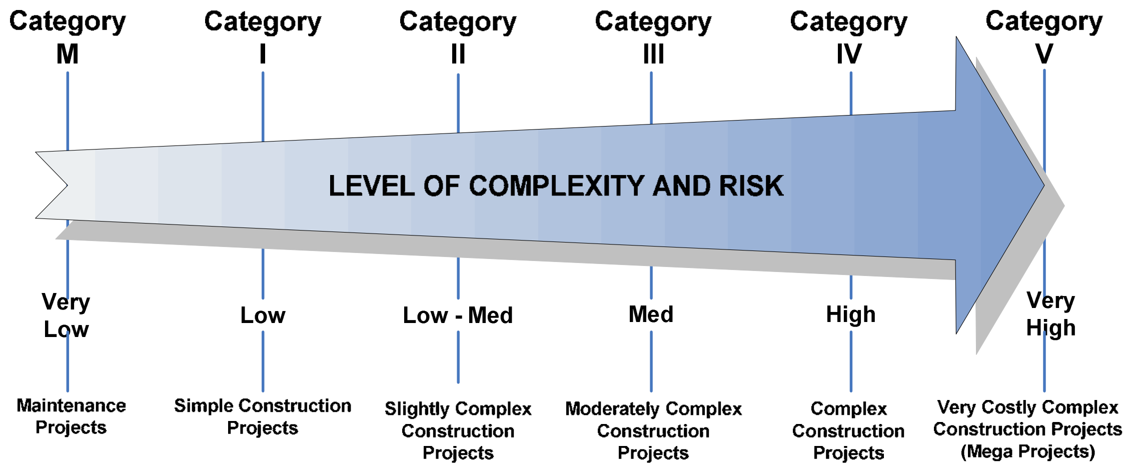
OTHER ASSETS IMPROVEMENT TYPES (Including Signs, Earth Walls, & Drainage)			
Code	Name	Structure Number Required?	MAP-21 Funds
56	Other Asset Inspections	No	Inspection and evaluation of infrastructure assets other than bridge or tunnels, including signs and sign-structures, earth retaining walls and drainage structures. Inspection related training for signs and sign-structure, earth retaining walls and drainage structures.

APPENDIX G – FEDERAL WORK CODES

CODE	DESCRIPTION
ALT	Alternates
BRAL	Bridge Alterations
BRRP	Bridge Replacement
DEMO	Demolition
DSSR	Deck Superstructure Replacement
ENVR	Environmental
GENL	General
MABR	Major Bridge Rehabilitation
MAWD	Major Widening
MCON	Minor Construction - City
MIBR	Minor Bridge Rehabilitation
MIWD	Minor Widening
NCON	New Construction
NCST	New Construction-Surface Treatment
NONE	No Supplemental Code
NWBR	New Bridge
PREL	Preliminary Studies Only
R&B	Roadway & Bridge
RCST	Reconstruction/Resurfacing
RDWY	Roadway
RECS	Reconstruction
RELC	Relocation
RPRS	Deck Super/Substructure Repairs
RSRF	Resurfacing
RSRH	Restoration & Rehabilitation
SAFT	Safety/Traffic/TMS

APPENDIX H – PROGRESS SCHEDULE CATEGORY

Projects undertaken by VDOT vary in size, complexity, and risk; therefore, a one-size fits all approach to project management is unsuitable. Hence, a project ranking system has been defined to group projects by category based primarily on level of complexity and risk. The categorization of projects allows for a statewide consistent approach to scheduling and to ensure that the appropriate scheduling provision is applied. This is necessary to ensure that the appropriate level of scheduling efforts needed to establish and maintain schedule control on the project is applied.



Project Category – Level of Complexity and Risk

The VDOT project ranking system consists of six categories representing varying levels of complexity and risk ranging from very low to very high. Category M is the lowest, which represents typical maintenance projects and schedule type work. Categories I through V represent typical construction projects ranging from simple to very complex. Characteristics of each project category are described as follows:

1. **<u>Category M</u> –** Category M is the lowest level of the project ranking system, which represents typical maintenance contracts and seasonal schedule type work of very low complexity and risk. For such projects, specific timeframes for accomplishing the work is not a major constraint. Generally, a full construction season is given to allow for flexibility in planning and scheduling the Work. Therefore, Category M projects do not require the level of scheduling efforts typically needed for construction projects.

   A. Criteria for Category M Projects – Category M projects must generally meet the following criteria:

      i) Typical seasonal maintenance and schedule type work generally with contract duration of one construction season or less (Time is not a major constraint); or

      ii) Simple repairs or straight-forward maintenance work; and

      iii) Minimal traffic impact or limitations to the Work; and

      iv) No involvement with other major construction or improvement projects.

B. Examples of Category M Projects – The following are typical Category M projects:

- Pavement schedules (Asphalt overlay, surface treatments & slurry seals);
- Bridge joint repairs;
- Bridge painting (minimum traffic impact);
- Guardrail improvements;
- Curb and gutter repair/replacement;
- Raised pavement marker installation, lens replacement;
- Pavement marking schedules;
- Minor Bridge repair (District wide, minor miscellaneous);
- Rumble strip installation;
- Slope slide repair, scour repair;
- Ground mounted sign maintenance/replacement;
- Incidental concrete repair;
- Pipe culvert rehabilitation;
- Bridge cleaning;
- Retaining wall/ Sound wall repair;
- Signal maintenance & repair (District wide).

C. Category M Scheduling Requirements – Category M scheduling requirements are based on the basic scheduling information necessary for the Department to coordinate all work required to complete the Contract and to communicate with the public. The schedule information will also be used to plan for and manage the Department's cash flow, resources, and traffic. The Category M Schedule of Operations submission requirements are as follows:

i) An Initial Plan of Operations in the form of a written narrative to provide a description of the overall plan and intended sequence of progress.

ii) An Initial Schedule of Operations showing in a tabular format, the period of time within which work at each location, route, or segment of Work as delineated in the contract will be accomplished. A bar-chart or CPM schedule may be substituted, at the contractor's option.

iii) Every week, on a day agreed to by the Contractor and the Engineer, the Contractor is required to provide a Two-week Look-ahead (TWLA) schedule to show the detailed schedule of work planned for the following two weeks. The TWLA schedule may be provided in a tabular or bar-chart format.

2. **Category I** – Category I is the lowest level of the project ranking system for typical construction projects, which represents small, simple, low risk, and short duration construction projects. Such projects involve limited and straight-forward operations with limited project constraints and minimal or no traffic impact.

   A. **Criteria for Category I Projects –** Category I projects must generally meet the following criteria:

      i) Contract duration of one construction season or less (typically short durations); or

      ii) Estimated contract value of $1 million or less; and

      iii) Limited items of work; and

      iv) Simple operations in familiar and favorable conditions; and

      v) Minimal traffic impact or limitations to the Work; and

      vi) Does not include utility adjustments or relocations; and

      vii) Contract does not contain any Special Provisions for special time-related conditions, such as Interim Contract Milestones, A+B Bidding, Insensitive/Disincentive, or Lane Rental; and

      viii) Project has no major materials delivery restrictions, environmental impacts, delayed right-of-way acquisitions or access, or other similar constraints and restrictions.

   On a case by case basis, certain single-season simple and low risk projects with estimated contract value greater than $1M that generally meet the criteria listed above may qualify as Category I, as determined by the Area Construction Engineer (ACE);

   On a case by case basis, certain Federal Oversight (FO) maintenance projects or time sensitive maintenance projects with traffic impact may qualify as Category I, as determined by the ACE. Such projects may include concrete pavement repairs or overlay work on major corridors or certain relatively complex time sensitive maintenance projects that are involved with major construction or improvement projects. In such cases, the ACE should consult with the State Construction Scheduler for concurrence.

   B. **Examples of Category I Projects –** The following are typical Category I projects:

      — Rural grade, drain, & pave of unpaved roads (may include minor horizontal & vertical alignment changes and rural rustic projects with drainage work);

      — Minor bridge deck repair & concrete overlay (may include multiple bridges);

      — Break, seat, & overlay concrete pavement;

      — Spot improvements (multiple locations any of: incidental concrete, minor widening, enhanced pavement marking, & sign installation);

      — Building demolition in advance of construction projects;

      — Retaining wall installation or extensive repair;

      — Minor bridge substructure repairs (with traffic impact);

      — Bridge painting (multiple locations or with traffic impact);

— Minor urban reconstruction & improvement (could include curb & gutter and sidewalks; new or extended turn lanes);

— Surface reclamation, sub-grade stabilization & overlays;

— Bridge steel repair (with traffic impact);

— Signal installation – Site specific (w/o intersection improvements, no regional on-call installations);

— Overhead sign installation & lighting installations (multiple locations & or significant amount of lighting);

— Simple concrete pavement repair and/or asphalt overlay (major corridor, minimum traffic impact).

C. **Category I Scheduling Requirements –** Category I scheduling requirements are based on the basic scheduling information needed to communicate the Contractor's work plan and to assess progress of the Work. The schedule information will also be used to plan for and manage the Department's resources, expenditures, traffic, as well as to communicate with the general public. The Category I Progress Schedule submission requirements are as follows:

i) A written Baseline Progress Schedule Narrative describing the contractors initial proposed sequence and work plan.

ii) A Baseline Progress Schedule showing in a tabular format, the times within which the individual activities that make up the project will be accomplished. A bar-chart or CPM schedule may be substituted, at the contractor's option.

iii) A Progress Earnings Schedule (Form C-13C) to show the planned progress for each month in terms of percent complete. Percent complete is based on cumulative anticipated earnings relative to the total contract value.

iv) A two-week look-ahead schedule due every week to show the detail schedule for work planned for the following two weeks.

v) A revision of the Baseline Progress Schedule is required when the schedule has been significantly impacted by a change in the Work or condition or the contractor has deviated significantly from his baseline plan or schedule.

3. **Category II** – Category II represents slightly complex and relatively small to medium size construction projects that are typically completed in one or two construction seasons. Category II projects typically involve a limited number of straightforward contiguous, linear, or repetitive operations with typical project constraints and minimal traffic impact. Category II may also include certain multi-season low risk projects with minimal constraints or traffic impact. Such projects may involve simple repetitive or linear operations performed at multiple locations. They may also involve typical low risk widening projects in a rural setting, involving a limited number of straightforward contiguous or linear operations.

A. **Criteria for Category II Projects –** Category II projects must generally meet the following criteria:

   i) Contract duration of one construction season or less (may be two construction seasons, but involve simple linear or repetitive operations); or

   ii) Estimated contract value generally less than $3 million; and

   iii) Limited number of straightforward contiguous or linear operations; and

   iv) Low to medium traffic impact; and

   v) Typical conditions and limitations to the work; and

   vi) May include minimal utility adjustments; and

   vii) Contract does not contain Special Provisions for special time-related conditions, such as Contract interim milestones, Incentives/Disincentives, A+B bidding, or Lane Rental, etc.; and

   viii) Project has no major materials delivery restrictions, environmental impacts, right-of-way acquisitions, or other similar constraints and restrictions.

   On a case by case basis, certain slightly complex and low to medium risk projects with estimated contract value over $3M that generally meet the criteria listed above may qualify as Category II, as determined by the ACE.

   On a case by case basis, certain high-volume Federal Oversight (FO) maintenance projects or relatively complex maintenance projects that involve multiple items of work, multiple schedule constraints, or significant traffic impact may qualify as Category II, as determined by the ACE. Such projects may include concrete pavement repairs or overlay work on major corridors or certain relatively complex time sensitive maintenance projects that are involved with major construction or improvement projects. In such cases, the ACE should consult with the State Construction Scheduler for concurrence.

B. **Examples of Category II Projects –** The following are typical Category II projects:

   — Urban grade, drain, & pave projects of low to medium complexity;

   — Rural new construction or reconstruction grade separation roadway and bridge projects (low to medium size and complexity);

   — Complex reconstruction and improvements, including widening and multiple turn lanes that may include utility adjustments;

   — Major bridge substructure repairs (with low to medium traffic impact);

   — Bridge deck replacements, such as multi-span or over railroads;

— Major bridge deck repair & concrete overlay (multi-span or over railroads);

— Intersection improvements with lighting and/or signal installation;

— Bridge & drainage structure replacements (frequently single span with limited approach work);

— Major drainage improvements;

— Complex concrete pavement repair and/or asphalt overlay (major corridor, significant traffic impact);

— Multi-season bridge painting (with low to medium traffic impact).

C. Scheduling Requirements for Category II – As the amount of work, project duration, or level of complexity and associated risks increases, a scheduling tool that can graphically depict the sequence and timing of the activities in a time-scale format is required to effectively communicate the Contractor's plan of operations and the intended sequence of progress. The Category II Progress Schedule submission requirements are as follows:

i) A written Baseline Progress Schedule Narrative describing the contractors initial proposed sequence and work plan.

ii) A Baseline Progress Schedule showing in a bar-chart format, the times within which the individual activities that make up the project will be accomplished. A CPM schedule may be substituted, at the contractor's option.

iii) A Progress Earnings Schedule (Form C-13C) to show the planned progress for each month in terms of percent complete. Percent complete is based on cumulative anticipated earnings relative to the total contract value.

iv) A monthly update of the Progress Schedule and Progress Earnings Schedule is required to show the actual progress and the current plan to complete the remaining work.

v) A revision of the Baseline Progress Schedule is required when the schedule has been significantly impacted by a change in the Work or condition or the contractor has deviated significantly from his baseline plan or schedule.

4. **<u>Category III</u> –** Category III represents moderately complex, medium risk, and medium-size projects that are typically completed within two or three construction seasons. Category III projects typically involve a limited number of concurrent operations with typical project constraints and/or traffic impact. Category III projects may also include certain medium to large size multi-season low risk projects of relative complexity. Such as limited span bridge widening or interchange projects in a rural setting with typical constraints and minimal traffic impact.

A. Criteria for Category III Projects – Category III projects must generally meet the following criteria:

i) Med-size projects with contract duration generally spanning 2-3 construction seasons; or

ii) Estimated contract value generally between $3M and $10M; and

iii) Limited number of concurrent work-paths; and

iv) Medium limitations to the work and traffic impact; and

v) Limited number of utility adjustments; and

vi) Contract does not contain Special Provisions for special time-related conditions, such as Contract interim milestones, Incentives/Disincentives, A+B bidding, or Lane Rental, etc.; and

vii) Project has no major materials delivery restrictions, environmental impacts, right-of-way acquisitions, or other similar constraints and restrictions.

On a case by case basis, certain moderately complex and medium risk projects with estimated contract value over $10M that generally meet the criteria listed above may qualify as Category III, as determined by the ACE.

On a case by case basis, certain high-volume Federal Oversight (FO) maintenance projects or relatively complex maintenance projects that involve multiple items of work, multiple schedule constraints, and/or significant traffic impact may qualify as Category III, as determined by the ACE. Such projects may include major concrete pavement repairs or overlay work on major corridors or certain relatively complex time sensitive maintenance projects that are involved with major construction or improvement projects. In such cases, the ACE should consult with the State Construction Scheduler for concurrence.

B. Examples of Category III Projects – The following are typical Category III projects:

— Intersection improvements, including widening and multiple turn lanes with utilities, lighting and/or signal installation (with medium complexity and traffic impact);

— New roadway/bridge construction or extension projects (medium size, complexity, and traffic impact);

— Bridge deck replacements (multi-span, medium traffic impact);

— Bridge & drainage structure replacements (limited span with approach work);

— Bridge reconstruction/widening projects (medium size, complexity, and traffic impact).

C. **Scheduling Requirements for Category III –** As the number of operations or level of complexity and associated risks grow a scheduling tool that allows for adequate planning and scheduling of multiple concurrent activities with considerations for associated project constraints is needed to execute and control the Work. Such scheduling method will require that sufficient details and activity relationships are added to establish inter-dependencies between related activities to form network paths, with which the activities are scheduled. This is necessary to aid the project staff in efficiently planning and managing the Work and available resources. It is also necessary that the project critical path and the minimum time needed to complete the project are established. The Category III Progress Schedule submission requirements are as follows:

   i) A Preliminary Progress Schedule to provide a start-up schedule to execute and monitor the Work for the first sixty (60) calendar days.

   ii) A written Baseline Progress Schedule Narrative describing the contractors initial proposed sequence and work plan.

   iii) A Baseline Progress Schedule showing in a CPM format, the times within which the individual activities that make up the project will be accomplished.

   iv) A Baseline Progress Earnings Schedule (Form C-13C) to show the planned progress for each month in terms of percent complete. Percent complete is based on anticipated earnings relative to the total contract value.

   v) A monthly update of the Progress Schedule and Progress Earnings Schedule is required to show the actual progress and the current plan to complete the remaining work.

   vi) A revision of the Baseline Progress Schedule is required when the schedule has been significantly impacted by a change in the Work or condition or the contractor has deviated significantly from his baseline plan or schedule.

5. **Category IV –** Category IV represents complex, high risk, and medium to large size projects that are typically completed within three or more construction seasons. Category IV projects typically involve multiple concurrent operations with substantial project constraints and/or traffic impact. Such projects include, but are not limited to new, reconstruction, extension, or widening/improvements of medium to large roadway/bridge projects with substantial constraints and/or traffic impact. Category IV projects may also include certain med-size high-risk projects of relative complexity that include provisions for special time-related constraints or conditions as described below.

   A. **Criteria for Category IV Projects –** Category IV projects must generally meet the following criteria:

      i) Medium to large size projects with contract duration generally spanning 3 or more construction seasons; or

      ii) Estimated contract value generally between $10M and $75M; or

      iii) Contract contain Special Provisions for special time-related conditions, such as Contract interim milestones, Incentives/Disincentives, A+B bidding, or Lane Rental, etc.; and

      iv) Multiple concurrent work-paths; and

      v) Complex construction staging, phasing, or MOT issues; and

      vi) Complex constructability issues; and

      vii) Substantial traffic impact and limitations to the work; or

      viii) May include major utility relocation/adjustments; and

      ix) Project has no major materials delivery restrictions, environmental impacts, right-of-way acquisitions, or other similar constraints and restrictions.

   On a case by case basis, certain relatively complex and high risk projects with estimated contract value less than $10M that generally meet the criteria listed above may qualify as Category IV, as determined by the ACE. In such cases, the ACE should consult with the State Construction Scheduler for concurrence.

   On a case by case basis, certain relatively complex and high risk projects with estimated contract value over $75M that generally meet the criteria listed above may qualify as Category IV, as determined by the ACE.

   B. **Examples of Category IV Projects –** The following are typical Category IV projects:

      — Major urban intersection improvements, including widening and multiple turn lanes with utilities, lighting and/or signal installation (medium to large size, complex, and significant traffic impact);

      — Rural/Urban new construction or reconstruction grade separation roadway and bridge projects (medium to large size, complex, major corridor);

      — Major bridge deck replacements (substructure repairs, multi-span, multi-lane, major corridor, with significant traffic impact);

      — Major bridge & drainage structure replacements (multi-span with extensive approach work);

— Major widening projects (medium to large size and complexity, major corridor, with significant traffic impact).

C. Scheduling Requirements for Category IV – As the size, complexity, and associated risks grow, a scheduling tool that allows for adequate planning and scheduling of multiple concurrent operations is needed to execute and control the Work. For such projects, a tool that allows for an accurate assessment of the reasonableness of the schedule and current status of the activities and the project based on costs is also needed to control the project and to manage schedule-related risks on the project. The Category IV scheduling and Progress Schedule submission requirements are based on the Category III requirements with additional requirements as described below:

i) A Preliminary Progress Schedule to provide a start-up schedule to execute and monitor the Work for the first ninety (90) calendar days.

ii) A written Baseline Progress Schedule Narrative describing the contractors initial proposed sequence and work plan.

iii) A cost-loaded Baseline Progress Schedule showing in a CPM format, the times within which the individual activities that make up the project will be accomplished. The cost-loaded schedule will be used to generate the time-distributed cost data on which the Progress Earnings Schedule is based.

iv) A Baseline Progress Earnings Schedule (Form C-13CPM) based on time-distributed cost data generated from the cost-loaded schedule to show the planned progress for each month in terms of percent complete. Percent complete is based on anticipated earnings relative to the total contract value.

v) A 30-day look-ahead schedule to depict work planned for the next period.

vi) A monthly update of the Progress Schedule is required to show the actual progress and the current plan to complete the remaining work.

vii) A revision of the Baseline Progress Schedule is required when the schedule has been significantly impacted by a change in the Work or condition or the contractor has deviated significantly from his baseline plan or schedule.

6. **<u>Category V</u> –** Category V is the highest level of the project ranking system for typical construction projects, which represents very complex and very costly mega-projects that are typically completed within four or more construction seasons. Category V projects typically involve very large multiple multi-phased contracts with substantial project constraints and/or significant traffic impact. Such projects typically involve major roadway/bridge construction/widening, very complex multiple-span bridges, tunnels, or major interchange work on major corridors.

   A. Criteria for Category V Projects – Category V projects must generally meet the following criteria:

      i) Very large projects with contract duration generally spanning 3 or more construction seasons; or

      ii) Estimated contract value generally greater than $75M; and

      iii) Contract contain Special Provisions for special time-related conditions, such as Contract interim milestones, Incentives/Disincentives, A+B bidding, or Lane Rental, etc.; and

      iv) Considerable number of concurrent work-paths; and

      v) Complex construction staging, phasing, or MOT issues; and

      vi) Complex constructability issues; and

      vii) Substantial traffic impact and limitations to the work; and

      viii) Substantial number of right-of-way acquisitions and/or relocations; or

      ix) Major material delivery restrictions; or

      x) Significant utility relocation/adjustments; or

      xi) Major environmental or community impact.

   On a case by case basis, certain relatively complex and very high risk projects with estimated contract value less than $75M that generally meet the above listed criteria may qualify as Category V, as determined by the ACE. In such cases, the ACE should consult with the State Construction Scheduler for concurrence.

   B. Examples of Category V Projects – The following are typical Category V projects:

      — Major rural/urban new construction or reconstruction grade separation roadway and bridge projects (large size, complex, major corridor, significant traffic impact);

      — Major widening projects (large size, complex, major corridor, significant traffic impact);

      — Major interchange projects (large size, complex, major corridor, significant traffic impact);

      — Major bridge deck replacement projects (large size or multiple bridges, complex, major corridor, significant traffic impact);

      — Individual Category III or IV level projects that are included in multiple-contract mega-projects like Woodrow Wilson, Springfield Interchange, etc.).

C. Scheduling Requirements for Category V – As the size, complexity, and associated risks grow, a scheduling tool that will allow for adequate planning and scheduling of multiple concurrent operations, projects, manpower, equipment, and expenditures is required to accomplish the Work. Such scheduling tool should also allow for an accurate assessment of the status of the individual activities and the project; as well as progress of selected major operations that will have the greatest influence on the schedule.

The Category V scheduling and Progress Schedule submission requirements are based on the Category IV requirements with additional requirements as described below:

i) A qualified and dedicated project scheduler/coordinator to coordinate all scheduling meetings and issues.

ii) Contractor’s working on a Category V project will be required to develop and maintain their schedules in a collaborative environment within the VDOT scheduling database.

iii) A written Baseline Progress Schedule Narrative describing the contractors initial proposed sequence and work plan.

iv) A Preliminary Progress Schedule to provide a start-up schedule to execute and monitor the Work for the one hundred and twenty (120) calendar days.

v) A cost-loaded and resource-loaded Baseline Progress Schedule showing in a CPM format, the times within which the individual activities that make up the project will be accomplished. The cost-loaded schedule will be used to generate the time-distributed cost data on which the Progress Earnings Schedule is based.

vi) A Baseline Progress Earnings Schedule (Form C-13CPM) based on time-distributed cost data generated from the cost-loaded schedule to show the planned progress for each month in terms of percent complete. Percent complete is based on anticipated earnings relative to the total contract value.

vii) A Commodity Progress Report (Form C-13COM) to show the anticipated progress of selected items of work, whose rate of progress will have the greatest influence on the schedule.

viii) A weekly four-week look-ahead schedule detailing work planned for the next four weeks.

ix) A monthly update of the Progress Schedule is required to show the actual progress and the current plan to complete the remaining work.

x) A revision of the Baseline Progress Schedule is required when the schedule has been significantly impacted by a change in the Work or condition or the contractor has deviated significantly from his baseline plan or schedule.