

8/16/2017

STEP-BY-STEP

GUIDE

AASHTOWare Estimation
Concept to Project

8/16/2017

Once the consultant has the concept and estimate at final PS&E they will set the cost estimate to, "05 - Final PS&E" under "Cost Estimate summary", under "General", "Estimate Phase" this will generate an email to Construction Management letting them know that the estimate is ready for their review.

Verify that all of the following fields have been correctly filled in or fill in the following fields. Click Concepts under Estimation, under Concept Overview find your concept. Click on your concept id, Under Concept Summary:

Home Previous My Pages Actions Help Log off

Concept Overview

▼ Concept Overview Save ?

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

0 marked for deletion | 0 changed

| 16111 | Route 1 & 9 Haynes Avenue Operation Improvement, Widening, Reconstruction and | |
|------------|---|------------------|
| 16117 | ROUTE 10, CR 508 (W. NORTHFIELD AVE) TO MERKLIN AVE/KELLEY D | |
| ROBERT | ROBERT TEST OF EST.. | |
| ROJ-15810A | Route 29 Lockatong Creek to D & R Canal State Park | |
| ROJ-15810B | Route 29 Lockatong Creek to D & R Canal State Park | |
| Concept ID | Concept Description | Improvement Type |
| TEST_1 | THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ | |

General

- Concept ID
- Concept Description
- Spec Book
- Vendor Access (Set to zero)
- Unit System
- Primary County ID
- Primary District ID (1 is CPM, 4 is M&O)
- Highway Type (See Table 3) - Optional
- Season
- Terrain
- Urban/Rural
- Work Type

Locations

- Type – Midpoint
- Latitude (D:M:S)
- Longitude (D:M:S)
- Description (Midpoint of Project)

Cost Estimate

From the Concept you checked, click on "Cost Estimate", and then click on "Cost Estimate Name".

The screenshot shows a web application interface for Cost Estimate management. At the top, there are navigation tabs: Home, Previous, and My Pages. On the right, there are icons for Actions, Help, and Log off. Below the navigation, there are links for Overview and Cost Estimate Snapshots. The main section is titled "Concept Summary" and shows a dropdown menu for "Concept: ROBERT - ROBERT TEST OF EST..". Below this, there are tabs for General, Locations, and Cost Estimates. The Cost Estimates tab is active, showing a search bar with the text "Type search criteria or press Enter", an "Advanced" link, and "Showing 1 of 1". There is an "Add" button and a status indicator "0 marked for deletion | 0 changed". A table with two columns, "Cost Estimate Name" and "Estimate Type", is visible, with the value "ROBERT" under the "Cost Estimate Name" column.

Verify that all of the following fields have been correctly filled in or fill in the following fields.

General

- Cost Estimate Name
- Cost Estimate Description
- Vendor Access (Must be set to zero)
- Estimate Phase
- Estimate By

Categories

- Category Number – (A **four** digit unique identifier for a Cost Estimate category. Start with 0001 and number consecutively by ones.)
- Cost Estimate Description – (Roadway or Bridge, etc. This is a **required** field.)

COST ESTIMATE ITEMS

You can do your review from either the Cost Estimate items tab, the Item Pricing Worksheet or from the categories report.

Print Report for review

- o Click Cost Estimates under Estimation, under Cost Estimates Overview search for your Cost Estimate by Cost Estimate Name or Associated To.
- o Click on the Cost Estimate Name
- o Select the Actions button within the project description on the right.
- o Under Reports run the report you need for your review.

Cost Estimate Summary

▼ Cost Estimate: TEST_1 - THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ Save ?

| | | | |
|------------------------|--|--------------------------|--|
| General | Project Items exist. Only pricing fields are editable. | | Actions |
| Categories | ▼ Parent Attributes | | Select Item Bid History Profile... |
| Cost Estimate Items | Associated Type | Unit System | Tasks |
| Variables | Project | English | Build Project Items |
| Adhoc Pricing | Entity | Improvement Ty | Create Profile From Estimate |
| Non-Construction Costs | T1234 | | Create Snapshot |
| Markups | Entity Description | Work Type | Export Cost Estimates |
| Annualization | THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ | GENC - GENERA | Item Bid History Criteria |
| | Spec Book | | Transition Cost Estimate to Detail Items |
| | 07 | | Validate Prequal Worktypes |
| | ▼ Estimate Information | | Views |
| | Cost Estimate Name * | Design Build | Attachments |
| | TEST_1 | <input type="checkbox"/> | Default Bid History Profiles |
| | Cost Estimate Descr | Profile | Issues |
| | THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ | No | Links |
| | Vendor Access * | Budget Class | Parent Project |
| | Q 0 | | Pricing Worksheet |
| | NJDOT Internal User | | Snapshots |
| | Estimate Phase | Lanemiles | Reports |
| | | | Cost Estimate Budget Class Report |
| | | Estimate Type | Cost Estimate Contingency Report |
| | | | Cost Estimate Formula Information Report |
| | | | Cost Estimate Scope Tracking Report |
| | | | Cost Estimate Summary Report |
| | | | Design Build Estimate Report |
| | | | Job Estimate by Category with Alt Items |
| | | | Job Estimate by Job ID and Category |
| | | | Prequalification Work Type Report |

You must save or print your report.

Once you have exited out of this report the system will not save it. You will need to re-run the report again if not saved. This is true for all reports. All reports are viewed as PDF files.

****NOTE****

During your review, you will not see the check box for "Fixed Price". This function is available under the "Project" **after** the "Concept ID" is "Transitioned to Project" and "Build Project Items" processes are run.

Transition to Project

- o Click Concepts under Estimation, under Concept Overview find your Concept ID.
- o Select the Actions button within the project description on the right.
- o Click on "Transition to Project"

The screenshot shows the 'Concept Overview' page. At the top, there are navigation buttons for 'Home', 'Previous', and 'My Pages'. On the right, there are 'Actions', 'Help', and 'Log off' buttons. Below the navigation is a 'Concept Overview' header with a 'Save' button and a help icon. A search bar contains the text 'Type search criteria or press Enter'. Below the search bar, it says 'Advanced Showing 6 of 6'. On the right side, it says '0 marked for deletion | 0 changed'. The main content is a table with columns for 'Concept ID', 'Concept Description', and 'Improvement Type'. The table contains several rows, including '16111', '16117', 'ROJ-15810A', 'ROJ-15810B', 'TEST_1', and 'ejd_32217_check'. The 'TEST_1' row is selected, and an 'Actions' dropdown menu is open over it. The menu items are: Copy, Copy Concept Snapshot..., Delete, Exclude from Search Results, Open, Tasks, Export Concept Cost Estimates, **Transition to Project**, Update Concept Spec Book, Views, Attachments, Cost Estimate Snapshots, Links, and Tracked Issues.

Enter the "New Project ID", that will be the DP number of the project. Click on "Transition"

The screenshot shows the 'Transition Concept to Project' form. At the top, there are navigation buttons for 'Home', 'Previous', and 'My Pages'. On the right, there are 'Actions', 'Help', and 'Log off' buttons. Below the navigation is a 'Transition Concept to Project' header with a 'Transition' button and a help icon. A yellow warning banner says 'There are unsaved changes.'. Below the header, there are two columns of fields. The left column has 'New Project ID*' with a text input field containing 'T1234' and 'Concept Description' with the text 'THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ'. The right column has 'Spec Book' with the text '07' and 'Unit System' with the text 'English'.

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The project has been created.

**** You now have to "Build Project Items"**

(This term means you are coping the items and categories from the cost estimate to the project. If this process is not done, your project will not have items and categories) **

- o Click Cost Estimates under Estimation, under Cost Estimates Overview search for your Cost Estimate by Cost Estimate Name or Associated To.
- o Click on the Cost Estimate Name
- o Select the Actions button within the project description on the right.
- o Click on "Build Project Items"

Home Previous My Pages Actions Help Log off

Overview Contingency Assignment Life Cycle Costs Typical Sections Item Pricing Worksheet

Cost Estimate Summary

Cost Estimate: TEST_1 - THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ Save ?

General

- Categories
- Cost Estimate Items
- Variables
- Adhoc Pricing
- Non-Construction Costs
- Markups
- Annualization

Parent Attributes

Associated Type: Project

Entity: T1234

Entity Description: THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ

Spec Book: 07

Estimate Information

Cost Estimate Name*: TEST_1

Cost Estimate Descr: THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ

Vendor Access*: 0 (NJDOT Internal User)

Estimate Phase: [Dropdown]

Unit System: English

Improvement Type: [Dropdown]

Work Type: GENC - GENERA

Design Build: [Checkbox]

Profile: No

Budget Class: [Dropdown]

Lanemiles: [Dropdown]

Estimate Type: [Dropdown]

Actions

- Select Item Bid History Profile...
- Tasks
- Build Project Items**
- Create Profile From Estimate
- Create Snapshot
- Export Cost Estimates
- Import Snapshot...
- Item Bid History Criteria
- Transition Cost Estimate to Detail Items
- Validate Prequal Worktypes
- Views
- Attachments
- Default Bid History Profiles
- Issues
- Links
- Parent Project
- Pricing Worksheet
- Snapshots
- Reports
- Cost Estimate Budget Class Report
- Cost Estimate Contingency Report
- Cost Estimate Formula Information Report
- Cost Estimate Scope Tracking Report
- Cost Estimate Summary Report
- Design Build Estimate Report
- Job Estimate by Category with All Items
- Job Estimate by Job ID and Category

https://njdot-pr-test.infotechfl.com/CostEstimate/179/CostEstimateBuildProjectItems

When you see the message, "Built Project Items Successfully" The items and categories are now part of the Project.

The screenshot shows a web application interface. At the top, there are navigation buttons: 'Home', 'Previous', and 'My Pages'. On the right, there are 'Actions', 'Help', and 'Log off' links. Below the navigation is a breadcrumb trail: 'Overview > Contingency Assignment > Life Cycle Costs > Typical Sections > Item Pricing Worksheet'. The main heading is 'Cost Estimate Summary'. A green message box says 'Built Project Items Successfully.' with a close button. Below this is a blue header for the current cost estimate: 'Cost Estimate: TEST_1 - THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ' with a 'Save' button and a help icon. A left sidebar contains a menu with items: 'General', 'Categories', 'Cost Estimate Items', 'Variables', 'Adhoc Pricing', 'Non-Construction Costs', 'Markups', and 'Annualization'. The main content area shows a message: 'Project Items exist. Only pricing fields are editable.' followed by a 'Parent Attributes' section with the following data:

| | | | | |
|---------------------------|---|-------------------------|------------------|-----------------------------|
| Associated Type | Project | Unit System | English | |
| Entity | T1234 | Improvement Type | | |
| Entity Description | THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ | | Work Type | GENC - GENERAL CONSTRUCTION |
| Spec Book | 07 | | | |

****NOTE****

You can now review the items for fixed price under Project Item Worksheet

- o Click Project under Preconstruction, under Project Overview find your Project ID.
- o Click on Item Worksheet
- o You can now review any items that are fixed price.

Home Previous My Pages Actions Help Log off

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

Wage Decisions

Project Summary

Project: T1234 - THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ Save ?

Proposal:

General

Counties

Regions

Points

Road Segments

Bridge Segments

Workflow

UPC/DP Number
T1234

Project Description *
THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ
Up to 120 characters

Unit System *
English

Federal Project Number

State Project Number

Controlling Project

Vendor Access
Begin typing to search or press Enter

Urban/Rural
U - URBAN

E & C Percent

UPC Number

CE Job Number

Primary Project County ID
C005 - CAPE MAY

Primary Project District ID
S1 - S1

Home Previous My Pages Actions Help Log off

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

Project Item Worksheet

Project: T1234 - THIS IS A TEST OF THE NEW ESTIMATION WORK FLOW FOR NJ Save ?

Project Item Total
105,063.73

Search: Type search criteria or press Enter System Default Showing 8 of 8

| Cat ID | Proj Line | Item | Descr | Units | Quantity | Price | Ext Amt | Suppl Descr | Bid Req | Suppl Descr |
|--------|-----------|---------|---------------------------------------|-------|-----------|-------------|-----------|-------------|---------|-------------|
| 0001 | 0001 | 401039M | HOT MIX ASPHALT 9.5 L 64 SURFACE C... | T | 100.000 | 62.00000 | 6,200.00 | | No | |
| 0001 | 0002 | 401042M | HOT MIX ASPHALT 9.5 M 64 SURFACE... | T | 100.000 | 66.17562 | 6,617.56 | | No | |
| 0001 | 0003 | 609075M | REMOVAL OF BEAM GUIDE RAIL | LF | 2,000.000 | 2.18808 | 4,376.16 | | No | |
| 0001 | 0004 | 602012M | INLET, TYPE B | U | 23.000 | 3,804.78298 | 87,510.01 | | No | |
| 0002 | 0005 | 802003M | TRIMMING EXISTING TREE, OVER 6" T... | U | 3.000 | 20.00000 | 60.00 | | No | |
| 0002 | 0006 | 802021M | TREE REMOVAL, OVER 6" TO 12" DIAM... | U | 5.000 | | | | No | |
| 0002 | 0007 | 806003P | FERTILIZING AND SEEDING, TYPE A | SY | 14.000 | | | | No | |
| 0001 | 0008 | 160007M | ASPHALT PRICE ADJUSTMENT | DOLL | 1.000 | 300.00000 | 300.00 | | Fixed | No |

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Funding

Once all the fields have been checked you can then notify Federal Aid for Federal or State funding.

Create a Proposal

1. Click Project and under Project Overview find your project.

- Select the Actions button within the project description on the right.
- Under Tasks click Create Proposal from Project.
- Ensure that the following fields are populated and are correct:
 - Proposal ID
 - Proposal Description
 - Proposal Long Description (What is on the Adv. Memo)
 - Federal and State Project Number
 - Primary County must be filled
 - Primary District must be filled
 - Contract Type
 - Proposal Type
 - Contract work Type
 - Save
 - After the save you will then be at Proposal Summary

General The information here is the same general information as above.

Projects The project should already be associated with the proposal.

Time

- Ensure that the following fields are populated and are correct:
 - Click New
 - Time ID: 00
 - Time Description: ENTIRE SITE
 - Time Type: DT
 - Check, Main Proposal Time
 - Completion Date: Fill in with the completion date from Adv. Memo.
 - Liquidated Damages Rate: 0
 - Liquidated Damages Unit of Time: Days
 - Save

Create Sections and Items

- Click the action button next to the save button.
- Under Tasks click Auto Generate Sections. The sections are now created.

Once this is done you can now validate the proposal.

- Click on Overview
- Type in the DP# for the project and click enter.
- Click on the action button in the project description to the right.
- Under Tasks click Validate Proposal, this will tell you if you the proposal is valid or if you are missing information needed to make the proposal valid.

After the letting and the bids have been uploaded to AASHTOWare Project

Generate the Bid Tab Analysis Report

- Search for your proposal by DP# Under Proposal Overview.
- Select the Actions button within the project description on the right.
- Under Reports, select Bid Tab Analysis.
- Check or uncheck what you need in your report and select Execute.

You must save or print your report. Once you have exited out of this report the system will not save it. You will need to re-run the report again if not saved. This is true for all reports. All reports are viewed as PDF files.

After the project has been awarded.

Run a pass for SiteManager In WebT

This process will move awarded projects from AASHTOWare Project to SiteManager. There are fields that need to be filled for the pass to run successfully.

- o The Federal and State Project Number must have information. Example; N/A, a federal project number a state project number or 100% STATE.
- o The field 'PJSST1' under Project Summary is either blank or can only have 10 characters. This field will not give you an error if there are more than 10 characters so keep an eye out for that. ;)

Once these fields are set you can then run the pass.

- Click the actions button at the top right of the home screen in Pre-con.
- Select 'Execute System Interface'.
- Select 'Export To SiteManager'.
- Click 'Execute'.
- If it ran ok you will see a green box stating "System Interface Started....."
- Go to 'Process Status Overview'

Your process should be the first one, in the blue box under process it will say 'ExportToSiteManager'. When the process is complete there will be a 'Yes' under Success. You can then look at the 'SITEMANAGER_EXPORT.LOG' for any errors.

Example;

Start Time: 10/25/2013 14:53:13.730

Contract:

Successful Export Count: 9, Invalid Export Count: 0

Bid Letting '13080601', Proposal '12428' successfully exported.

Bid Letting '13082901', Proposal '13411' successfully exported.

Finish Time: 10/25/2013 14:53:30.266

Run the pass in SiteManager

Open SiteManager as an administrator, at the SiteManager Panel

- Double click 'System Administration(+)'
- Double click 'Process List'. You will need to run two Process ID's.
- Double click 'BREFLOAD', click 'Submit', and click 'OK'. This process can take some time, you can check the progress by clicking on 'Services' and 'Process Status'. Once this process is complete click 'OK' and then
- Double click 'BPRELOAD', click 'Submit', and click 'OK'. This process is quick, Once this process is complete click 'OK'.

During the running of these two processes no errors will pop up so you need to check and see if your projects have been moved to SiteManager. At the SiteManager Panel

- Double click 'Contract Administration(+)'
- Double click 'Contract Records(+)'
- Double click 'Contracts'

Click on the first yellow folder (open). Here you can scroll through the list and see if your projects are there. If they are, your projects are now in SiteManager. If you do not see your projects on this list your projects did not move to SiteManager and trouble shooting is needed to correct the errors. At this point you will need to contact either Infotech or myself to trouble shoot these errors.