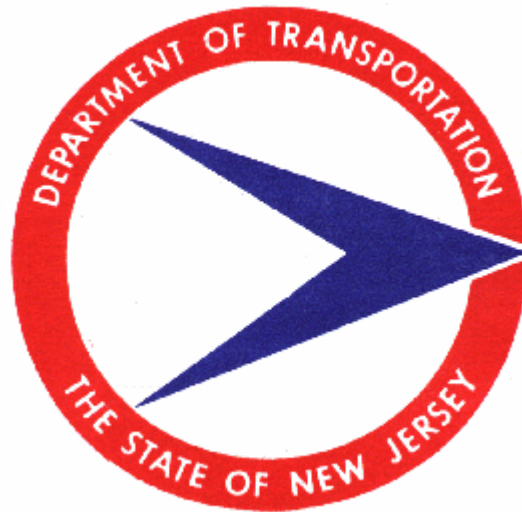# State of New Jersey
Department of Transportation

Proposal Estimating System
and Letting & Award System Guide

Prepared by Trns•port Team
December 2006

Ver 1.0

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1.0 Introduction to PES

State Highway Agencies (SHAs) need to estimate costs and prepare projects before they advertise proposals for bid letting. The Trns•port Proposal and Estimates System (PES) was developed to help the SHA define projects, estimate item prices, and create proposals, bid-letting packages, and standard reports for the pre-letting phase.

PES helps you to manage all the complexities of a large construction project, including multiple funding sources, differing engineering and contingency (E&C) percents, non-participating items, alternate item and item-category specifications, identification of special provisions and supplemental specifications, and addendum processing.

Used with the Trns•port BAMS/DSS database, PES can access item price information and produce bid-based item price estimates.

PES interfaces with the Trns•port Letting and Award System (LAS), which manages the bid letting phase. You can enter proposal changes (addendums) in PES after the proposals have been distributed but before an award has been made. These changes will automatically be integrated into the bid analysis and tabulation programs and properly displayed in the contract schedule.

Figure 1- 1. PES Application Banner

1.1 PES Workflow

The Trns•port PES workflow is as follows:

Enter the project header

The initial step in defining a set of project estimates in Trns•port PES is to enter the header information for the project. You can enter header information defining the project (for example, project control number and project description). You can batch load project header data from an external file.

Interactive
Process: Maintain Prime Projects
Location: Prime Projects List Window

      Add Prime Project Detail Window

Interactive
Process: Maintain Projects
Location: Projects List Window

Batch
Process: Load Projects
Location: File Menu, Import Option

Enter details about the project estimate

After you enter the project header information, you can enter the project estimate information, which consists of categories of work (segments of work, such as bridge or roadway) and the work items for each category of work. You can also batch load project estimate data.

Trns•port maintains master reference lists of work items and funds in the system. These reference lists might need periodic maintenance as new specification books or new items are issued and new funds become available.

Interactive
Process: Maintain Projects
Location: Tabbed Folder Change

> Projects List Window
>> Categories List Window
>> Funding List Window
>> Items List Window
>> Project Estimate Items Worksheet
>> Counties List Window
>> Pay Adjustment Index List Window

Batch
Process: Load Project Estimate Data
Location: File Menu, Import Option

Set estimated item prices

There are several ways to set estimated item prices. You can set prices interactively at the project item level or you can import item prices from CES. For items where the prices are known they are entered manually in PES, where the prices are not known they will be imported from CES.

Interactive
Process: Maintain Project Estimates
Location: Manage Project Estimates Menu

Interactive
Process: Set Contract Price Estimates
Location: Manage Contract Proposals Menu
> Define Contract Proposals Submenu

Interactive
Process: Load Contract Price Estimates
Location: Manage Contract Proposals Menu

>   Define Contract Proposals Submenu

Batch
Process: Generate Project-Level Bid-Based Prices
Location: Projects List Window

>   File Menu, Run Process Option

Generate Preliminary Detail Estimates report

This report details the estimate items and their groupings by category, fund, and unit. It documents the project cost estimate and identifies necessary funding sources to cover the estimated costs.

Batch
Process: Generate Preliminary Detail Estimates
Location: Prime Projects, Projects or Proposals List Window, or Bid Letting List Window
>   File Menu, Run Process Option

Enter the proposal header

After you complete the project estimates, you can define the proposal. The initial step in defining the proposal is to enter the proposal header information, such as contract ID, description, and DBE/WBE goals.

Interactive
Process: Add Proposal
Location: Proposals List Window
>   Add Proposal Detail Window

Enter proposal sites

Proposal site information, such as specifying contract time, defines the proposal work sites. Trns•port supports three time methods: completion date, calendar days, and available days. You can use a special 00 site to define the contract time for the contract as a whole. The time component of a Cost Plus Time bid can be entered at the Proposal site level.

Interactive
Process: Add Site Location
Location: Proposals List Window
>   Site Locations List Window
>   Add Site Location Detail Windo

Assign projects to the proposal

After you define projects, you can assign them to the appropriate proposals. You can assign one or more projects to a proposal and you can assign projects from different prime projects to the same proposal. Typically NJ assigns one project to one proposal. Do not assign an individual project to multiple proposals.

Interactive
Process: Add Projects

Location: Proposals List Window
           Proposal Project List
           Add Projects List Window

Assign special provisions to the proposal

Typically NJ does not have Special Provisions in proposals. If there are special provisions in the proposal, you can assign them to the proposal.

Trns•port maintains a master reference list of special provisions in the system. This reference list might need maintenance as new special provisions are developed.

Interactive
Process: Add Special Provisions
Location: Proposals List Window
           Special Provisions List Window
           Add Special Provisions List Window

Generate proposal section and line numbers

Trns•port provides an automated facility to generate proposal section and line numbers for the project estimates. For projects assigned to the proposal, Trns•port combines the project categories of work into proposal sections that are based on the category federal construction class. Trns•port combines project line items into proposal items according to item number.

Rerun this process on a proposal whenever you add or delete categories or items from one of the proposal's member projects or you change the list of member projects for the proposal.

Batch
Process: Generate Section and Line Numbers
Location: Proposals List Window
           File Menu, Run Process Option

Generate Proposal Schedule reports

After you define a proposal, you can run the Proposal Schedule reports. These reports list the proposal-level items, which can be submitted to contractors for bids. A blank section is also provided for contractors to bid the number of days for each site in a Cost Plus Time bid. Additional reports, for internal or external use can be generated as well.

Batch
Process: Generate Proposal Schedule
Location: Proposals List Window
           File Menu, Run Process Option

Enter bid letting header

After you define the proposals for a bid letting, you can enter the header information for the bid letting, such as bid letting number, location of letting, and time of letting.

Interactive
Process: Add Bid Letting Package
Location: Bid Letting List Window
           Add Bid Letting Package Detail Window

Assign proposals to the bid letting

You can assign proposals to a bid letting in the order that the proposals will be called. Each proposal assigned to the bid letting will be given a Call Number.

Interactive
Process: Add Letting/Proposal
Location: Bid Letting List Window
                Letting/Proposals List Window
                Add Letting/Proposal Detail Window

1.2 Logging-on to the NJDOT Network

Access to the PES application will be via a Citrix server or, if installed on a workstation, through the workstation. This section outlines the hardware requirements and procedures for accessing the NJDOT network.

1.2.1 System Requirements

The minimum system requirements that a user will need to use Trns*port through Citrix are:

- Pentium 3, 1GHz Processor
- 256 Mb RAM
- 10 Mb hard disk space
- Microsoft Windows 2000 or XP
- Internet Explorer 5.0 through 6.0, Service Pack 1 or Netscape 6.2 through 7.1

High-speed connection to the internet (DSL, Broadband, T1, etc.)

1.2.2 Login Procedure

In order to access the NJDOT network, a user needs a Citrix account and a PES Trns*port account. These will be provided by NJDOT. For further assistance with obtaining the necessary user accounts, please email trnsport.support@dot.state.nj.us or call 609-530-3582.

Steps for logging-in are:

Login to Citrix

- Access the link via an internal connection using the following link:
  https://dotfarm.njes.state.nj.us/Citrix/MetaFrame/auth/login.aspx

The Citrix login window will open as shown in Figure 1-2. Enter the username and password that was provided for you by NJDOT. The domain is "njdot." Note: The username field is not case-sensitive but the password field is.
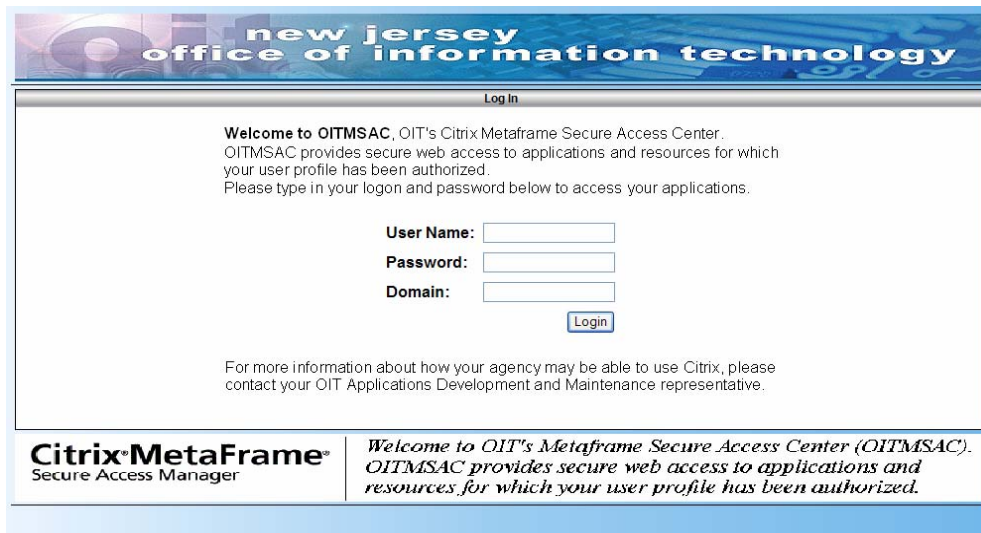
Figure 1-2. Citrix Login Window

Once logged-in you should be able to see the Citrix desktop, Figure 1-3.
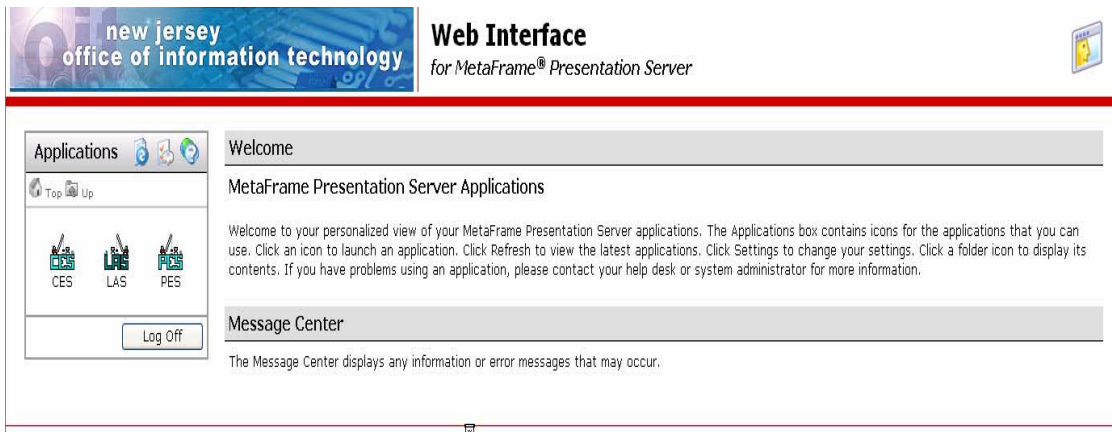
Figure 1-3. Citrix Desktop

Once connected to the NJDOT network you may open the PES application by either double-clicking on the PES icon on the desktop or by navigating to the application from the Programs List by selecting from the Start menu Programs>AASHTO Client-Server Trns*port>PES 5.9b-1.

PES displays an information window and then an Enter User Information window.

Figure 1-4. Enter User Information Window

1.3 Changing Your Password

To change your password, choose **Change Password** from the **Utilities** menu (see Figure 1-5).
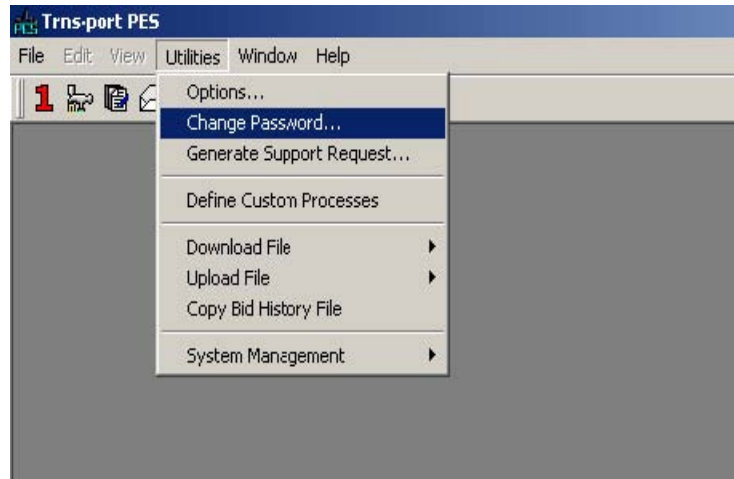
Figure 1-5. Utilities Menu

Change password window as shown in Figure 1-6.
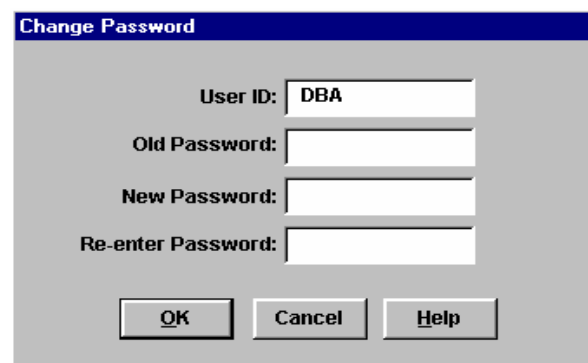
Figure 1-6. Change Password Window

Enter your old password, press TAB, enter your new password, press TAB, and enter your new password again for verification. Click OK to change your password or CANCEL to close the window without changing your password.

If you click OK, your password changes. If you exit the software and attempt to log on using your old password, you receive an error message.

If you forget your password or exceed the maximum number of login attempts allowed, please contact NJDOT PES Support at trnsport.support@dot.state.nj.us to reset your password.

1.4 Using Online Help

When you have PES running, you can use the online help system to find specific information and instructions for using the application. The online help window contains three tabs, each of which gives you a different tool for finding information.

The Help Index window opens on the Contents tab, which is most useful when you already know the section for which you want Help. It is organized by category and displays the list of topics available in the Help system in a Windows Explorer type.

You can locate help topics by navigating the expandable/collapsible books and pages in the left pane of the window. A book represents a category of topics, and a page represents an individual topic. When you double-click on a book, it opens to reveal additional books and pages. To access a topic, double-click on the desired page and the topic information appears in the right pane of the Help window.

The Index tab works like a traditional book index. It lists keywords or phrases alphabetically. The Index tab is particularly useful when you need to search for information on a specific topic and the exact wording of the topic is not known. To display a topic from the Index tab, click the Index tab and enter the first few letters of the desired search topic in the text box above the Index entry list. The list scrolls to reveal the topic that matches the keyword(s) you entered. Click a topic in the list to display the information in the right pane of the Help window.

The Search tab provides access to a rapid full-text search. To use the Search tab to find a specific topic, enter the search word in the Section 1 text box. Section 2 displays words that match the results of the preliminary search completed in Section 1. If the overall search still needs to be narrowed, select the best match from the list in Section 2. Section 3 then displays a more specific list of topics. Click the best topic match from the search results in Section 3 to display the information in the right pane of the Help window (see Figure 1-7 PES Help Window).
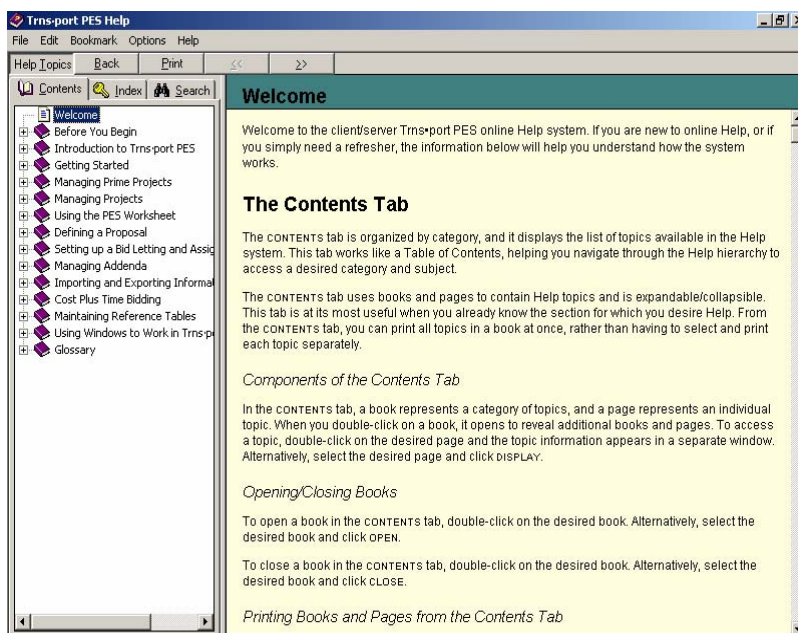
Figure 1-7. PES Help Window

1.5 Using Field Help

Field help is available in Trns•port for any field into which you can enter data. To get more information about a field, right-click the field and select Field Help.

To get field help about a field displayed in a grid (except calculated fields), click the column header with the right mouse button and select Field Help.

1.6 Working with List, Tab, and Tabbed Folder Windows

Trns•port displays information in three kinds of windows: list, detail and tabbed folder.
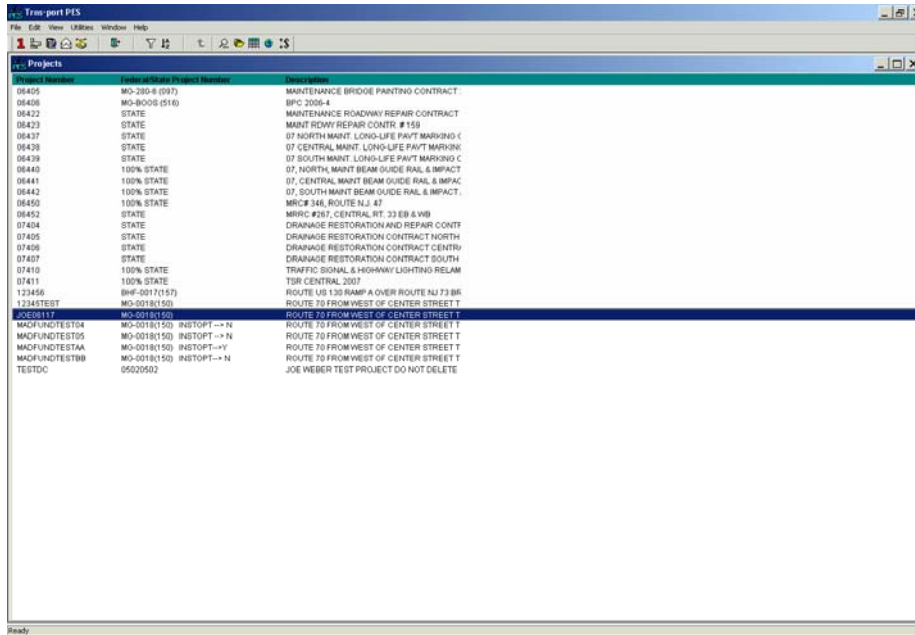
Figure 1-8. List Window

A list window (see Figure 1-8) is usually the first window you see when you begin a new task. List windows contain lists of records for a type of data, such as projects, proposals, or categories. You can browse list window information by clicking on the scroll bar buttons on the right or bottom of the window. From a list window, you can select a specific record and open a detail window or a tabbed folder window.

Detail windows contain fields and data associated with a specific record. Different kinds of data are contained in different detail windows (for example, funding, counties, and categories). Detail windows allow you to add, change, or browse this information. Much of the information that is available in detail windows is also available in tabbed folder windows.
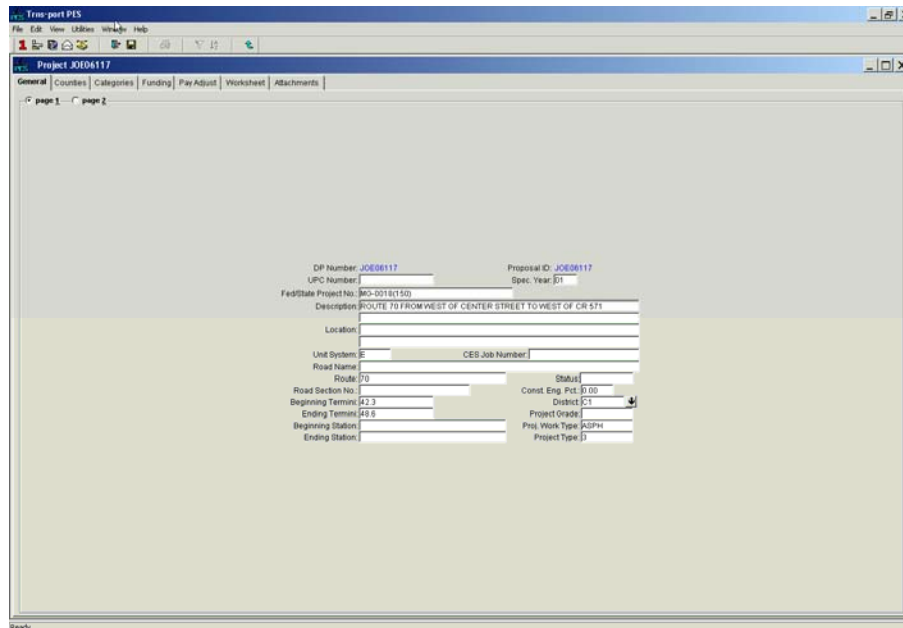
Figure 1-9. Tabbed Folder Window

In a tabbed folder window, a different kind of information is available on each tab. You can move from tab to tab by clicking the tab labels. When you click a tab, Trns•port makes that tab active, displaying it in the foreground with the tab label in bold text. Tabs with more than one screen of information contain option buttons that allow you to page through the individual screens.

1.7 Adding, Changing, and Deleting Information

In list windows you can use the right mouse button menu to add, change, delete, produce reports or perform other tasks. Menu items on the right mouse button menu are context specific and will change as the data type in the list window changes.

Detail and tabbed folder windows can be used in three modes: add, change and browse. Add mode is used to add new records to the active list window. Change mode is used to change or add new information to an existing record in the active list window. Browse mode is used to simply view the current information in an existing record in the active list window.

The Add and Tabbed Folder Add commands open a window in which you can add information to create a new record. The Change and Tabbed Folder Change commands open a window for the active record where you can modify information. The Delete command deletes the selected record or records.

Tabbed folder windows are a more convenient way to work with data than detail windows. This is because a tabbed folder allows you to access many different kinds of information associated with the record without leaving the tabbed folder window or opening additional windows, as you must when using detail windows.

1.8 Using Tabbed Folder Grids, Lookups, and Detail Areas

Some tabs in a tabbed folder window contain lists of data fields in a grid. You can resize and reorder the columns in a grid. You can also sort the records displayed in a grid quickly by double clicking on the column header.

A tab containing a grid also contains a standard Trns•port filter and a quick find box you can use to search selected single columns of data. To use the quick find box, double-click on the header of the column you want to search. Type the string of characters you want to find in the quick find box and Trns•port highlights the first row containing characters that match in the active column.
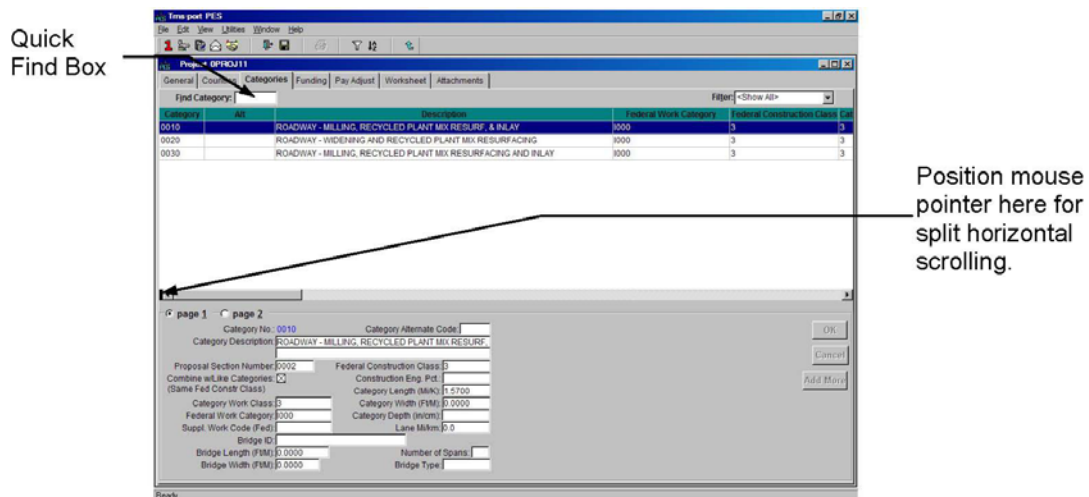
Figure 1-10. Using Grids

You can divide a grid into two regions that scroll independently of each other. This feature, known as "split horizontal scrolling," allows you to leave one or more columns fixed in one half of the grid, while being able to scroll through the rest of the columns in the other half of the grid. To use this feature, position the mouse pointer over the small vertical black bar at the left end of the horizontal scroll bar (see Figure 1-10).
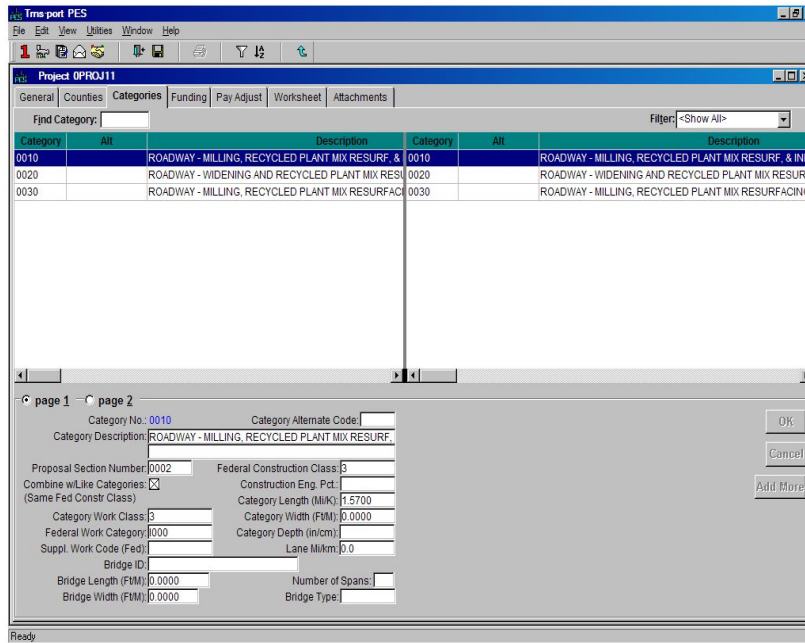
Figure 1-11. Split Grid

The mouse pointer changes to a double-headed arrow. Press and hold the left mouse button and drag the mouse to the right to create a new horizontal scrolling border. When you release the mouse button, you will have two independently scrolling regions in the grid (see Figure 1-11).
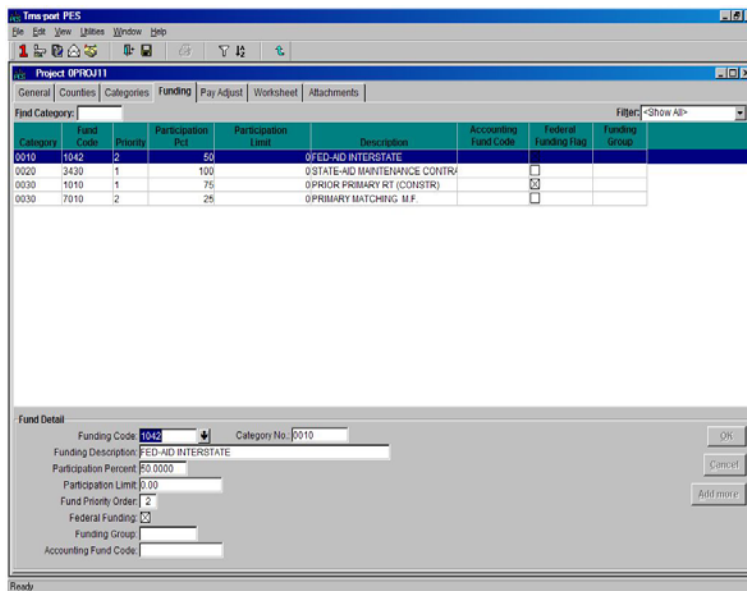
Figure 1-12. Grid and Detail View

Some tabs contain both a grid and a detail area (see Figure 1-12). You can enter information on this type of tab in one of two ways:

Display the detail area by selecting Show Detail from the right mouse button menu and enter information into the fields of the detail area.

Hide the detail area by selecting Hide Detail from the right mouse button menu and enter information directly into the cells of the grid.

1.9 Filtering Information

You can use Trns•port's filter to compare and match information in order to find and list all the records that meet certain criteria. You can filter data in a list window or in a lookup window for a detail window field (see Figure 1-13).
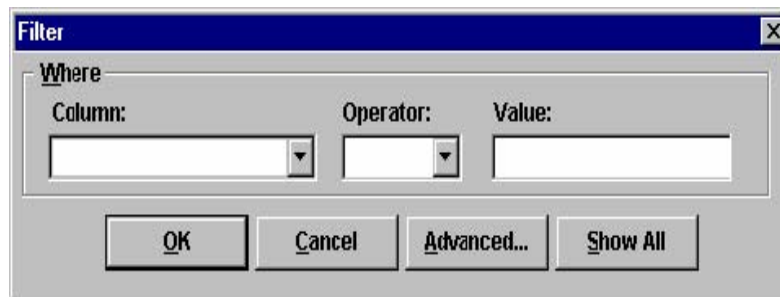
Figure 1-13. Filter Window

To use a filter, click the [] (FILTER) button on any list window to display a Filter window.

You can click in the Column, Operator and Value fields to display a list of values from which you can choose the information you want filtered.

Column   The Column field contains the names of the most commonly used columns in the table from which the list window is built. When you click on the down arrow in the column field, the list of columns to choose from will appear.

Operator   The Operator field contains the operators equal to (=), greater than (>), less than (<), greater than or equal to (>=), less than or equal to (<=), not equal to (<>), Contains, Does Not (contain), and Like and Not Like (operators used for pattern matching) to narrow your filter.

Value   The information you type in the Value field is the filter criterion you are using as a delimiter or are trying to match.

1.9.1 Using the Advanced Filter

You can also filter information using a more complex set of criteria. Click the ADVANCED button in the Filter window and Trns•port displays the Advanced Filter. This window allows you to use numerous combinations of conditions to filter with various operators, values and logicals (see Figure 1-14).
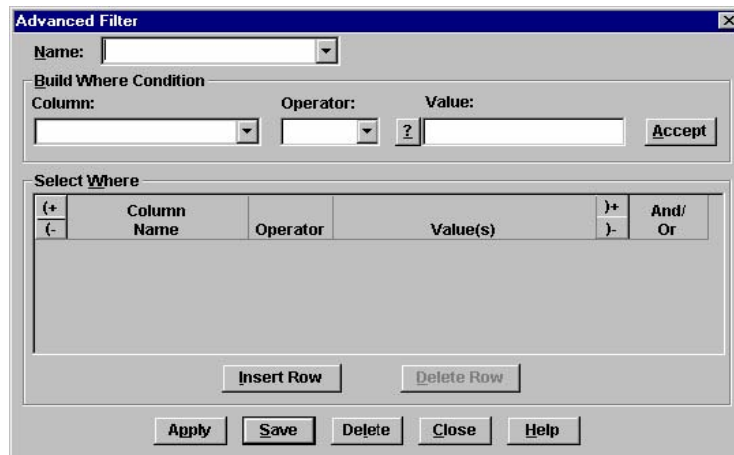
Figure 1-14. Advance Filter Window

Use the Advanced Filter window to build a set of conditions you want Trns•port to use to filter information. This set of conditions consists of a series of "where conditions" combined with logical options, such as And/Or, (+ and (−.

Create each where condition by choosing a value in each of the Column, Operator, and Value fields and then clicking the ACCEPT button.

Column   This field contains the names of all the columns in the table from which the list window is built. When you click on the down arrow in the column field, the list of columns to choose from will appear.

Operator   This field contains all the operators found in the basic filter.

Value The information you type in this field is the filter criterion you are using as a delimiter or are trying to match.

You can use * as a wild card to match any value or ? to match a single character only with the LIKE or NOT LIKE operators.

> If you want to search for a value that contains the characters * or ?, you can use the backslash character (\) just before the * or ?. For example, Quantity * Item would search for Quantity * Item. If you want to search for the \ character, put a backslash in front of the \; for example use \\job to search for \job.)

Trns•port displays each where condition in the Select Where area of the Advanced Filter window in the order that you created them. After all the where conditions you need for your filter are listed, combine them into a "where clause" by clicking in the And/Or column to the right of each condition line and selecting the appropriate option from the menu for each line. Typically, all lines requiring Or should be combined before the lines requiring And. Use the logical options (+ and (− to override the And/Or combinations where necessary.

1.9.2 Saving Filters

When you have finished creating a filter, the Name field at the top of the Advanced Filter window allows you to name and save it so that you can use it again later. The name can be up to 30 characters long. To save a filter, enter a unique name in the Name field and click SAVE. When you want to use the filter again, select the filter name from the list box and Trns•port automatically loads the filter parameters. To remove a saved filter from the database, select the filter name from the list and click DELETE.

1.10 Sorting Information

You can sort the information in list windows so that the records are grouped in a way that makes it easier for you to do your work (see Figure 1-15).
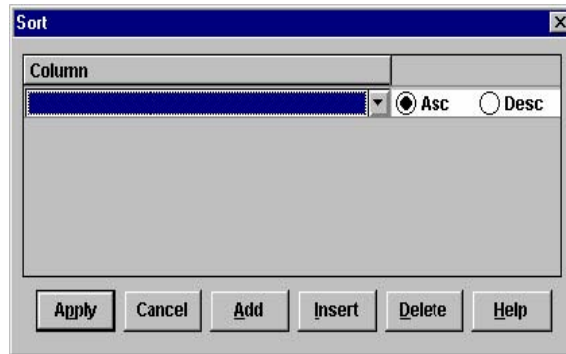
Figure 1-15. Sort Window

To use the sort function, click the [SORT] button on any list window to display a Sort window.

The Column field contains the names of all columns in the table that are used to build the list window. When you click on the down arrow in the column field, the list of columns to choose from will appear.

You can click Asc or Desc to select an ascending (A-Z) or descending (Z-A) sort order for the selected column. When values containing both numbers and letters are listed in ascending order, numbers precede letters, and vice-versa for descending order.

If you click APPLY, Trns•port sorts the rows in the order you specified.

If you click ADD, Trns•port adds another row for sort criteria.

If you click INSERT, Trns•port inserts another row for sort criteria before the currently selected row.

If you click DELETE, Trns•port deletes the currently selected row of sort criteria.

If you click HELP, Trns•port displays a help window with information about sorting a list window.

2.0 Managing Projects

A Trns•port project is a group of work or work items associated with transportation-related construction. It is the smallest group of items that can be let to a vendor.

The way you structure a project will affect Trns•port processing through Trns•port PES, Trns•port LAS, and SiteManager. Trns•port produces vouchers for an individual project; therefore, how you define them in PES determines how SiteManager will produce the vouchers. The way bidders see the proposal also depends on the way you define the project and item data.

2.1 Adding Projects

Projects are added in Trns•port PES by entering a project manually through the PROJECT TABBED FOLDER ADD window.

2.1.1 Adding a Project through the Tabbed Folder Window

To add a project, click the projects button on the Trns•port PES button bar to display the Projects list window.

Select any Project in the list and choose Tabbed Folder Add from the right mouse button menu. (You can display the right mouse button menu by clicking the right mouse button on any project in the Projects list window.)

Trns•port displays the General tab of the Add Project tabbed folder window as shown in Figure 2-1.
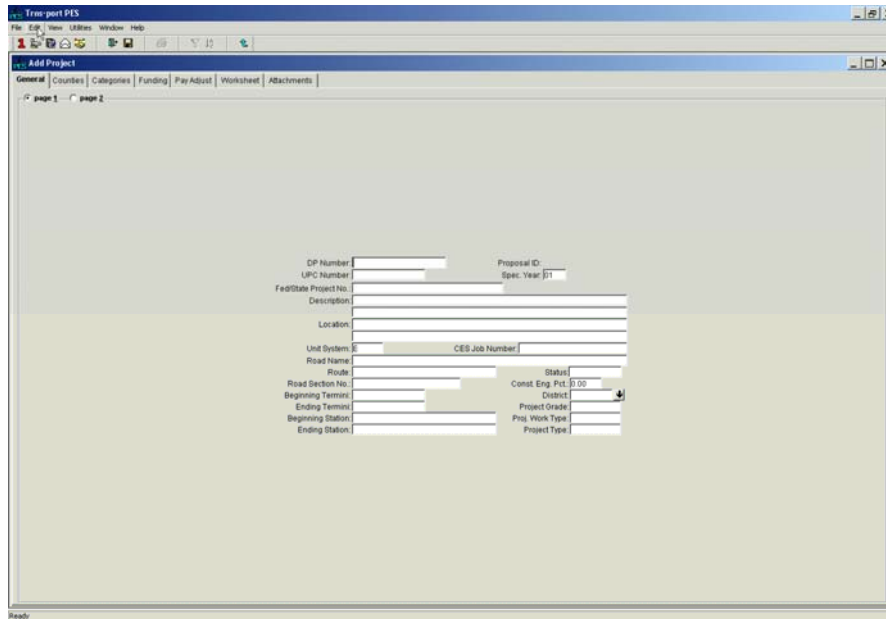
Figure 2-1. General Tab of the Project Tabbed Folder Window

The GENERAL tab contains general information fields used for identifying the project on two pages. To create a complete record you must enter information in these fields:

DP Number	A unique alphanumeric or number used by Trns•port to identify a project. (DP#)
UPC Number	Enter the UPC Number.
Federal/State Project Number	If there is Federal funding and a Federal Project Number it should be entered.
Spec Year	Select Spec year from drop-down menu.
Description	This description should match the name of the project as listed on the plans, key sheet and advertising memo. Trns•port prints on most project reports. These two lines of data allow you to enter a brief description (maximum 120 characters).
Location	The location of the primary work performed in the project.
Unit System	This field will default to E (English).
CES Job Number	Entry into this field is not required.
Road Name	The name of the primary road on which project work is being performed. If the work is being performed on various roads or Statewide enter Various or Statewide.
Route	The route number or road number of the road affected by a project. This field can be left blank if there is no Route indicated.
Road Section No.	Leave Blank.
Beginning Termini	Milepost at the beginning of the project. (This is not a required field).
Ending Termini	Milepost at the end of a project. (This is not a required field).
Latitude of Midpoint	Trns•port BAMS/DSS uses this field to draw maps with the project correctly placed; you can leave it blank until DSS. Enter latitudes in the form degrees, minutes, seconds.
Status	Select the current status of the Job from the drop-down menu.
Cons. Pct	This field defaults to 0.00. Do not change it from the default.
District	Select the Region where a project or contract is located as well as who will be running the project during construction (maintenance or construction) from the drop-down menu.
Project Grade	This field will NOT be used.
Project Work Type	Select work type from the drop-down menu. Appendix A identifies and defines work types.
Project Type	Select the project type from the drop-down menu.

When you finish adding information to Page 1, click the Page 2 option button located in the upper left corner of the GENERAL tab to move to Page 2. All the required information is located on Page 1.
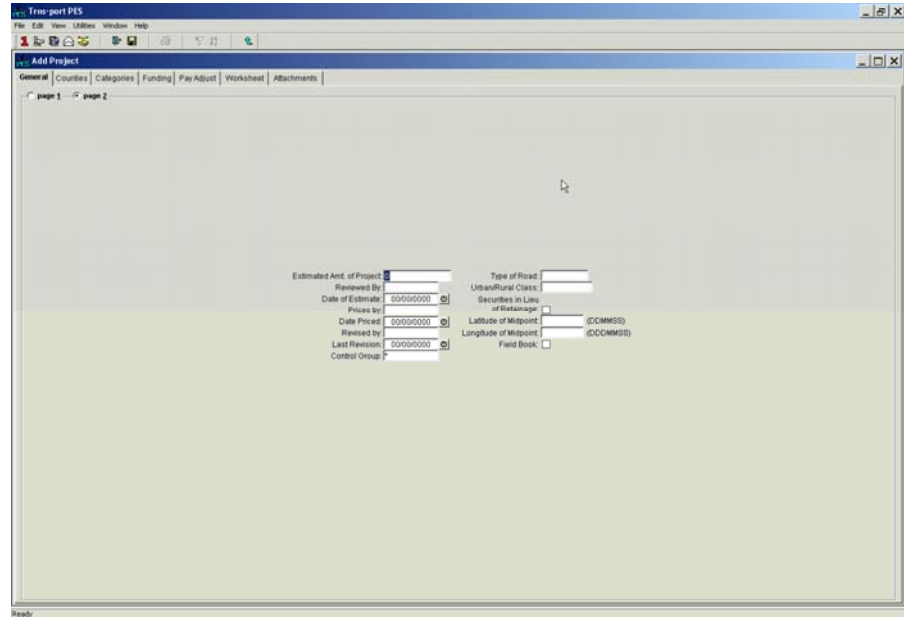
Figure 2-2. Page 2 of the Add Project Tabbed Folder Window

Estimated Amt. of Project	This field will default to 0.00. An amount may carry over from CES at a later point in time. This is not a required field.
Reviewed By	Select reviewer or estimator's name from the drop-down menu.
Date of Estimate	Enter today's date. Date can be entered using the calendar or by manually entering it.
Prices by	Enter the same person as the Reviewed by entry.
Date Priced	Enter the date pricing was performed either by manual entry or using the calendar provided.
Revised by	If revisions have been made enter the name of the person making the revisions.
Last Revision	The date the estimate was last revised. Enter manually or use the calendar provided.
Control Group	DO NOT alter this field.
Type of Road	Select the type of Highway from the drop-down menu (see *Appendix B - NJDOT Project/Job/Proposal Construction Classifications* for definitions).
Urban/Rural Class	Select Urban or Rural. This is a required field.

Securities in Lieu of	Skip this field.
Latitude of Midpoint	The latitude of the midpoint of construction. For Statewide projects use 401838; for regional projects use the following: North, 405493; South, 395487; Central, 401435; and HQ, 401530. If the project is not Statewide or Regional use the actual midpoint latitude of construction. The coordinate entered MUST be within the first County selected in the County tab.
Longitude of Midpoint	The longitude of the midpoint of construction. For Statewide projects use 0746452; for regional projects use the following: North, 0743459; South, 0750042; Central, 0741630; and HQ, 0744788. If the project is not Statewide or Regional use the actual midpoint longitude of construction. The coordinate entered MUST be within the first County selected in the County tab.
Field Book	Skip this field.

When you have finished adding information, save the new project to the Trns•port database by clicking the SAVE button or selecting Save from the File menu. Trns•port displays the new project in the Project list window.

2.2 Changing Project Information

You can change project information through windows. Select the project you want to change in the Projects list window and select Change from the right mouse menu. Trns•port displays the Project window with all known information.

You can add or change information in any field except Project Number. When you finish adding or changing information, click OK to save your changes or CANCEL to return to the Projects list window without saving.

2.2.1 Changing Project Information through the Tabbed Folder Window

You can change project information through the Project tabbed folder window. **It is recommended any adds or changes through PES and LAS are accomplished through a Tabbed Folder Add or a Tabbed Folder Change when the application presents the option.** Select the project you want to change in the Projects list window and select Tabbed Folder Change from the right mouse button menu. Trns•port displays the Project Tabbed Folder window with all known information.

You can add or change information in any field except Project Number. When you finish adding or changing information, save your changes to the database by clicking the SAVE button or selecting Save from the File menu.

2.3 Deleting a Project

To delete a project, select the project in the Projects list window and select Delete from the right mouse menu. Trns•port displays a series of two Delete

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Warning windows and a Confirm Delete window. See "Adding, Changing or Deleting Information" in Chapter 1 for more information about deleting.

2.4 Listing Projects

To produce a hard copy listing of project information, select the project or projects you want to list in the Projects list window. You can select more than one project by holding down CTRL while you select projects with the mouse. Then select Run Process from the right mouse button menu. Trns•port displays a Processes window.

Select List Projects from the Processes window and click OK to run a process. Click CANCEL to return to the Projects list window without running the process.

2.5 Copying Project Information to a New Project

The Copy Special command on the Edit menu allows you to copy similarly defined projects and eliminates the need to reenter data for each new project. After you copy the project, you can enter any minor changes to the new project.

To copy a project header and its associated category, funding, breakdowns, estimate item and breakdown item records to a new project, select the project you want to copy in the Projects list window and select Copy Special from the Edit menu. Trns•port displays the Copy Project window.
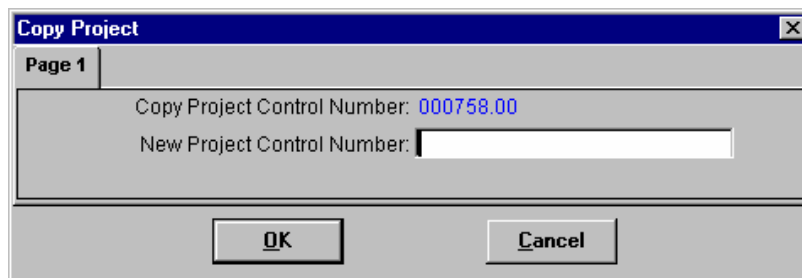
Figure 2-3. Copy Project Window

Enter the project number in the New Project Number field and click OK to save the new project or CANCEL to return to the Projects list window without saving (see Figure 2-3).

This is helpful in setting up TEMPLATE projects for use on similarly defined projects.

2.6 Maintaining County Information

Work might be performed in multiple counties for a single project. Trns•port allows you to select multiple counties and allocate the percentage of the project work that is being performed there.

> 📄 Note: At least one county must be added to the project before the proposal to which it is associated is initialized into LAS.

2.6.1 Maintaining County Information Through the Tabbed Folder Window

To designate the counties in which contractors will perform the work, click on the Projects list window to make it active. Select the project to which you want to add county information and choose Tabbed Folder Change from the right mouse button menu. Trns•port displays the Project tabbed folder window.

Click the COUNTY tab. Trns•port displays the COUNTY tab window listing all the counties associated with the selected project (see Figure 2-4).
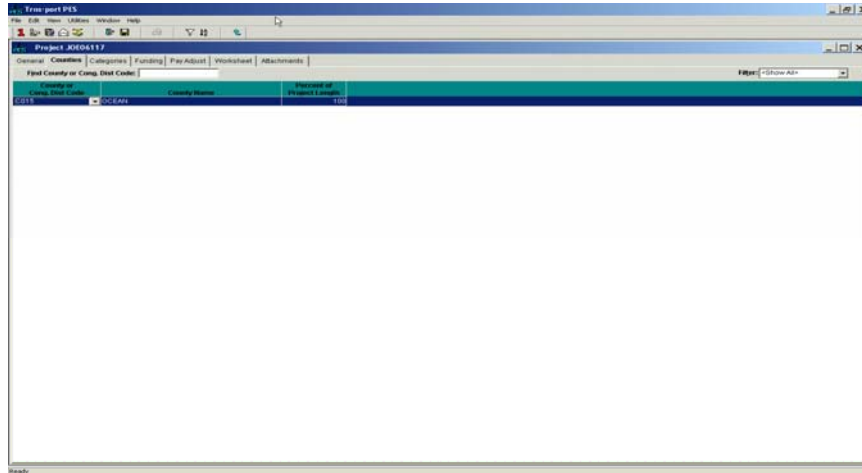
Figure 2-4. County Tab in the Project Tabbed Folder Window

2.6.2 Adding County Information

To add county information, click inside the Counties list and select Add from the right mouse button. Trns•port adds a blank row to the list (see Figure 2-5).
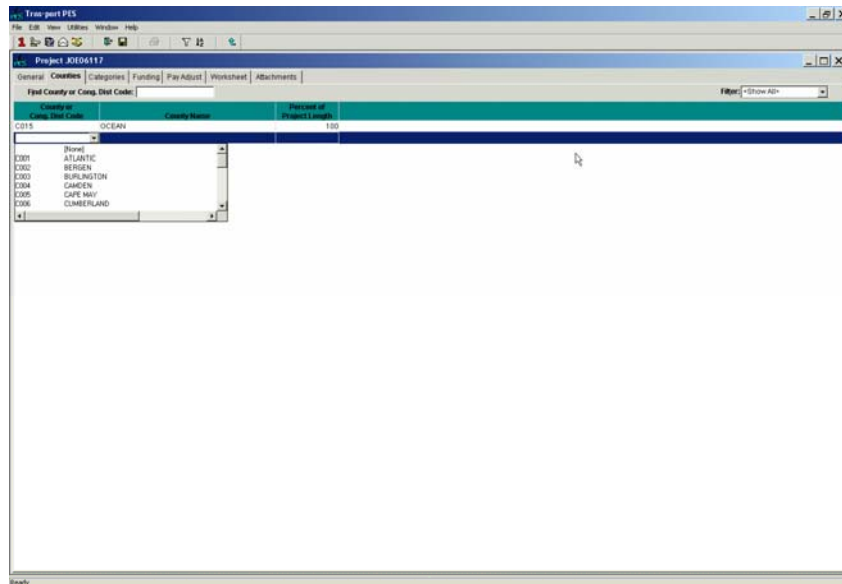
Figure 2-5. Adding a County on the County Tab

Select a county from the drop down list. The code will display in the box. Change the Approximate Percent of Project Length field if necessary and click OK or ADD MORE.

To add county information you must enter information in these fields:

County or Cong. Dist Code	A code value indicating that the project will perform work in that county. For Statewide projects ONLY put Mercer County prior to checking the project out of PES. Once the project is checked back in to PES from CES make sure to ADD Statewide under Mercer. It is important to remember that the first County listed MUST be the County where your latitude and longitude are in from the general tab.
Percent of Project Length	An approximate percentage of the portion of the project that lies within this county.

2.6.3 Changing County Information

To change information about a county, select a county record on the COUNTY tab and click in the field you want to change. You can only change information in the Approximate Percent of Project Length field.

When you finish making changes, click OK to save your changes or click CANCEL to return to the Counties list window without saving. Before leaving the tabbed folder window, save all your changes to the database by clicking the SAVE button or selecting Save from the File menu.

2.6.4 Deleting County Information

To delete a county designation, select the county record in the COUNTY tab window and choose Delete from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES in the window to complete the delete process.

2.7 Adding Categories to a Project

Trns•port uses categories to separate items of work into specific groups. You must create categories before you can add work items. You should group items into categories if they meet these criteria:

- All the items have the same funding source and participation percentages.

- All the items are for the same type of work (roadways or bridges).

- Users want items to be distinguished from all other items (for example, separating items for three different bridges into three separate categories).

- Each bridge should have its' own Category assigned to it.

You should group roadway and structure items in separate categories. If you have multiple funding scenarios within roadway or structure items, you should create additional categories.

2.7.1 Adding Categories Through the Tabbed Folder Window

To add a category to a project, select the project from the Projects list window and choose Tabbed Folder Change from the right mouse button menu. Trns•port displays the Projects tabbed folder window. Click the CATEGORIES tab to display the CATEGORIES tab window (see Figure 2-6).
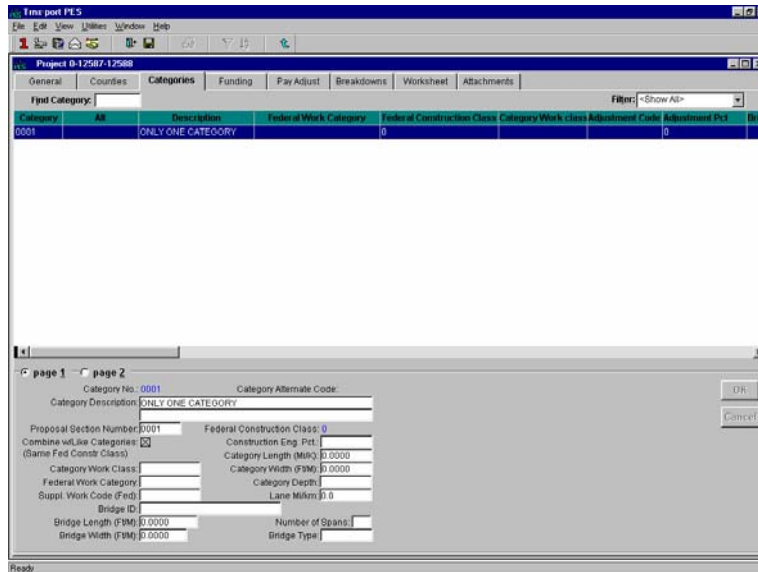
Figure 2-6. Categories Tab of the Project Tabbed Folder Window

The top part of the CATEGORIES tab contains a list of all the existing categories in the project. The bottom part of the CATEGORIES tab contains category detail information for the category selected in the list.

To add a new category, click in the Category list and select Add from the right mouse button menu. Trns•port adds a blank row to the list of categories. Enter data into the blank fields displayed in the detail area of the CATEGORY tab.

To create a complete category record you must enter information in these fields: When the details portion of the screen is open (as pictured above) the information must be entered into the lower detail section of the screen. If the details section of the screen is closed you are then able to enterinformation directly into the top portion.

Category Number	A four digit unique identifier for a project category. Start with 0001 and number consecutively by ones.
Category Description	Roadway or Bridge. This is a required field.
Proposal Section	This field is not required.

Combine with Like Categories	Make sure the box is NOT selected.
Category Work Class	Select the work class category. This field is not required for state projects.
Federal Work Category	Select the Federal Work Category for Federal projects.
Catg. Suppl. Work Code	This field will not be used.
Bridge ID	This is a REQUIRED field when structures are involved in the project. The NJDOT structure # should be used.
Bridge Length	The length of the bridge represented by the category. Not needed for roadway projects.
Bridge Width	The width of the structure represented by the category.
Category Alt Code	This field will not be used.
Federal Construction Class	Describes the type of construction used for the category. Select from the drop-down menu.
Construction Eng. Pct.	This field will NOT be used.
Category Length	The length of the project in miles represented by a given
Category Width	The width of the portion of the project represented by the category in feet.
Category Depth	The average pavement depth in inches.
Lane Mi	Calculate and fill in the lane miles for the category.
Number of Spans	Fill in the number of spans of the structure represented by the category.
Bridge Type	Select the type of bridge from the drop-down menu.

When you finish entering information on Page 1 of the detail area, click the Page 2 option button to display more fields (see Figure 2-7).
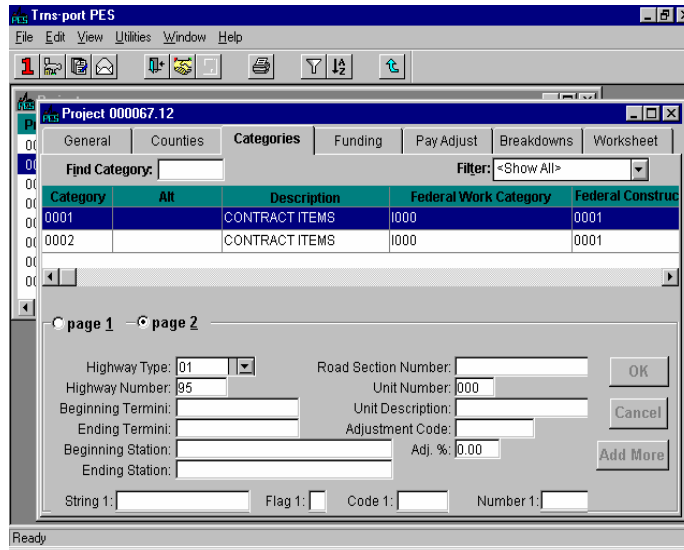
Figure 2-7. Page 2 of the Category Tab

Highway Type	Select the highway type from the drop-down menu (see *Appendix B – NJDOT Project/Job/Proposal Classifications* for definitions).
Highway Number	This field will not be used.
Beginning Termini	This field will not be used.
Ending Termini	This field will not be used.
Beginning Station	Fill in the station at the beginning of the project. If the category represents a structure fill in the beginning station of the structure.
Ending Station	Fill in the ending station of the project. If the category represents a structure fill in the ending station of the structure.
Road Section Number	This field will not be used.
Unit Number	This field will not be used.
Adj. Code	This field will not be used.
Adj. #	This field will not be used.
String	This field will not be used.
Flag 1	This field will not be used.
Code 1	This field will not be used.
Number 1	This field will not be used.

When you finish entering information for a category, you can click ADD MORE to enter information for another category. Click OK when you finish adding category information or click CANCEL to return to the Categories list window without saving the new record.

Before leaving the tabbed folder window you must save the new category record to the database by clicking on the SAVE button or selecting Save from the File menu.

You can create a Category 0000 when most of the work being performed in a category has the same funding sources and funding percentages (see Figure 2-8). Funding at this level is the default, project-level funding.

> 🖹 Note: You should not add items to Category 0000, just
>   funding.
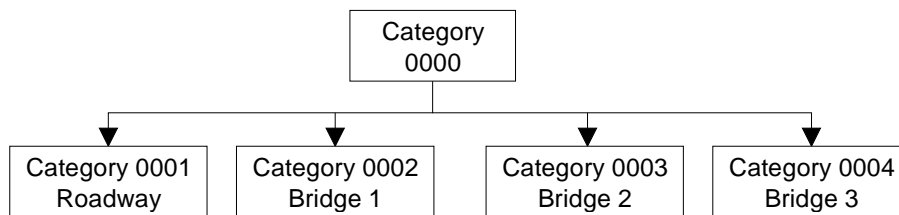
Figure 2-8. Category 0000 Example

All four categories, which have no defined funding in this example, revert to the Category 0000 funding. In another example, if Category 0003 bridge items have different funding, then you could specify funding for that category and the other three categories would use the default funding set up in Category 0000.

2.8 Changing and Deleting Category Information Through the Tabbed Folder Window

To change information about an existing category, select a category on the list in the CATEGORIES tab of the Projects tabbed folder window. Trns•port displays all the existing information about the selected category in the detail area of the CATEGORIES tab below the list.

You can change any of the fields on the CATEGORIES tab except the blue fields. To change information, click in a text box and add or delete information. When you finish making changes, click OK. If you want to return to the CATEGORIES tab without saving your changes, click CANCEL.

To delete an existing category and the related funding and item data, select the category in the Categories list and choose Delete from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES in the window to complete the delete.

2.9 Copying Category Information to a New Category

Selecting Copy Special from the Edit menu item allows you to copy similarly defined categories, eliminating the need to reenter all the data for each new

category. After you copy the category, you can enter the modifications to the new category.

Copy Special copies the category header information, all funding sources, and estimate item records, quantities and prices. To copy category, funding and item data to a new category, select the category you want to copy from the Categories List window or the CATEGORIES tab of the Project tabbed folder window. Then select Copy Special from the Edit menu or the right mouse button menu. Trns•port displays the Copy Category window.
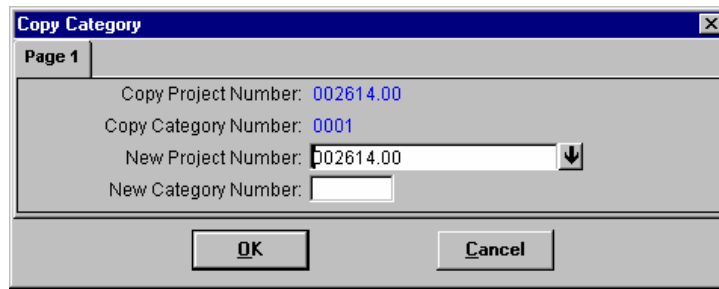
Figure 2-9. Copy Category Window

Enter the new project and category numbers in the New Project Number and New Category Number fields. Click OK to save the new category or Cancel to return to the Categories list window without saving (see Figure 2-9). Copy Special will not copy breakdown item data.

Trns•port performs Category Copy only if these conditions are satisfied:

- The Spec Year for the project in the copied from category must match the destination project's Spec Year.

- Your control group must match the control group of the destination project.

- The unit system (English or metric) of the current project must match the destination project's unit system.

Because copying a category to another category can result in estimate items with the same project estimate line number, renumber the project estimate items after categories are copied.

3.0 Using the PES Worksheet

You can use the PES Worksheet to add or change multiple items at one time. You must create a project header record and category headers before you can add items to categories through the PES Worksheet.

This section describes how to add items through the PES Worksheet. You can add items quickly with the PES Worksheet, which makes this an easier way to add or change item data. This chapter covers entering and maintaining estimate data through the worksheet.

3.1 Opening the PES Worksheet

When you open a project in the PES Worksheet, Trns•port closes the project data for all other users. No other users can change or delete project item information while it resides in your PES Worksheet.

To use the PES Worksheet, click on the Projects list window to bring it to the front (make it active). Select the project to which you want to add items by clicking on the project record and then clicking the WRKSHEET button or selecting PES Worksheet from the right mouse menu button. The PES Worksheet is also available on the WORKSHEET tab of the Project tabbed folder window.

Trns•port displays the PES Worksheet grid window (see Figure 3-1).

Figure 3-1. PES Worksheet List Window

The PES Worksheet contains data in columns and rows which identify items. Each row in the Worksheet represents one project estimate item.

The Worksheet contains these fields displayed as columns:

Category Number	The Category Number field is an identifier for a project category, derived from the list of categories attached to a project. You must enter a value in this required field. Range fill from the edit menu can be used to add this number if they are all the SAME.

Item Number	The entry in the Item Number field must be a value from the ITEMLIST code table (see arrow directly below the field) or it can be manually entered if it is known.
Item Description	The Item Description is the ITEMLIST short description that is printed on any report that includes descriptions. You cannot edit this field on the Worksheet as it will be automatically entered for standard items once the item number is entered.
Item Units	The Item Units field identifies the type of measurement used to determine the units of the item. The entry in the Item Units field must be a value from the UNITS code table. If the item is a lump sum item or a hybrid lump sum item, the field must contain the value "LS." You cannot edit this field on the Worksheet, it is also automatically filled.
Lump Sum Units	This field is not being used.
Est. Unit Price	This field will be filled in from CES unless the price is known, in which case it can be entered manually.
Extended Amount	The product of the quantity times the price. Trns•port automatically calculates this field base on the entries in the Project Item Quantity and Estimated Unit Price fields.
Supplemental Description Reqd	This box should be checked for all Non-Standard Items and Parcels being demolished.
Supplemental Description	This field will be required for all Non-Standard Items and parcels that are to be demolished in order to identify the actual item of working being constructed.
Supplemental Description Part Two	The Supplemental Description Part 2 field contains an additional 40 characters of space you can use to add supplemental information about an item.
Project Item Quantity	The quantity of a single project item. Used by Trns•port to determine the extended cost of an item.
Project Item Line Number	The Project Item Line Number field is a four digit number Trns•port uses to identify the item. Trns•port automatically enters this value.
Price Lock Flag	The Price Lock flag field indicates whether or not manually-entered estimate price information for items will be updated by the Trns•port PES Generate Bid Base Prices process. Enter "Y" in this field to restrict modifications to manually entered information, in other words, to "lock" the manually entered prices.
Price Source	The Price Source field identifies the source of the Estimated Unit Price. The entry in the Price Source field must be a value from the PRICSRC code table. You cannot modify this field.
Combine Like Items	This will default to NO, leave this as NO.

Project Item Generic Code 1	The Project Item Generic Code 1 field is a generic field individual agencies can use for their specific purposes.
Pre-established Price Flag	The Pre-established Price Flag field determines whether or not the Estimated Price of an item will be automatically entered on bidders' proposal schedules. Enter a "Y" in this field to force bidders to bid the engineer's estimated amount for the item

The remaining fields will not be used.

The PES Worksheet contains more fields than can be displayed in the window at one time. To view all the fields, drag the scroll box at the bottom of the window to the left or right or click and hold the arrows at the top and bottom of the scroll bar.

To get more information about a field contained in the PES Worksheet window or the WORKSHEET tab, click on the column header with the right mouse button and select Field Help. Field help is available for any field into which you can enter data.

> 📄 Note: When a project contains addendum items, the only fields in the PES Worksheet that may be changed are: Estimated Unit Price, Revised Item Price, Price Source, Non-Par Fund Code, Est. Price Lock Flag, Generic Code 1, and Breakdown Item Line No.

3.2 Customizing the PES Worksheet Display

You can customize the PES Worksheet to display the fields you work with most often when you open the worksheet. To do this, you hide, move, and re-size columns.

When you close the worksheet, Trns•port stores your customized worksheet configuration on your hard drive. When you start a work session, Trns•port looks for your customized set-up first. If Trns•port does not find a customized version, it opens the worksheet with all the columns visible in the default order.

3.2.1 Hiding Columns

To hide and display columns, choose Hide Columns from the Edit menu. Trns•port displays the Hidden Columns window in which you can choose the columns you want to hide (see Figure 3-2).
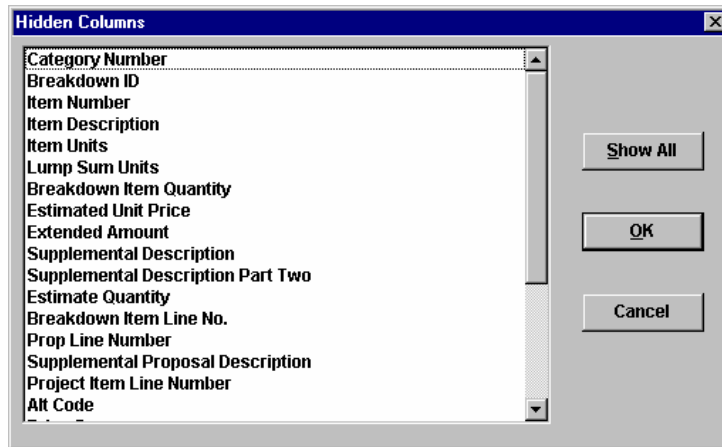
Figure 3-2. Hide Columns Window

The Hidden Columns window displays all the possible columns in the PES Worksheet. The Worksheet hides any highlighted column in the list. You highlight a column by

simply clicking on the column name.

Click on any of the columns you want to hide. To display all hidden columns, click the SHOW ALL button in the window. To display individual hidden columns, click on the highlighted name to clear the selection. Click OK when you have made your selections. Trns•port adjusts the display of the Worksheet accordingly.

> 📄 Note: Trns•port displays hidden columns you select to display on the far right of the worksheet; you may have to scroll to the right to view any recently displayed columns.

3.2.2 Moving Columns

You can drag the columns you use most often to the left of the window so they are visible each time you open the worksheet, or position related columns next to each other so information displays in logical units.

To move columns, click and hold down the left mouse button in the column title to highlight the column (the entire column should be shaded in black) and display a gray bar that extends the length of the Worksheet window. Drag the bar to the right or left and release the mouse button when it rests in the position where you want the column displayed. The column shifts to its new position and Trns•port adjusts all other columns in the worksheet.

3.2.3 Changing Column Widths

Sometimes a Worksheet column may be larger than is necessary for the information displayed in that column. To maximize you use of the display space you may want to adjust the width of the column. To change column widths, position the mouse pointer so that it rests on the border between two columns. When the pointer is in the right position, it changes to a cross-hatch with left and right arrows. Click the mouse on the border line and hold the left mouse button down as you drag the line to the right or left to make the column to the left of the line wider or more narrow.

3.2.4 Sorting Rows

You can sort rows in ascending or descending order according to specific columns. Choose Sort from the Edit menu or click the Sort button on the button bar. Trns•port displays the Sort window (see Figure 3-3).
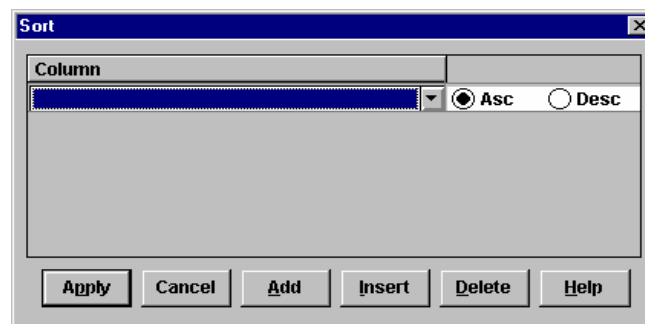
Figure 3-3. Sort Window

You can sort the Worksheet rows in ascending or descending order according to a column in the Worksheet. Use the drop-down list in the Column field to select a column and click the Asc or Desc option button to designate the order of the sort.

Click add to add another row of sort criteria or click insert to insert another row of sort

criteria before the currently selected row. If you add another row of sort criteria to the sort, Trns•port sorts the list in the order that the sort criteria are listed in the sort window.

To delete a row of sort criteria, select the row and click delete.

Click apply to apply the sort to the Worksheet or click cancel to return to the Worksheet without sorting the information.

3.3 Adding, Inserting or Deleting Rows

When you open an empty Worksheet you must add a row to the worksheet before you can perform any Worksheet operations. You can add, insert, and delete rows.

Select Add Row to End from the Edit menu to add a row to the end of the Worksheet. You can scroll to the bottom and enter values.

Choose Insert Row from the Edit menu to insert a row at a specific position in the Worksheet. When you select this command Trns•port inserts a row above the row selected when the command is invoked. For example, to insert a row in the fourth position of the Worksheet you click in the fourth row and choose Insert Row from the Edit menu.

To delete a row, click on the row and select Delete from the Edit menu or press SHIFT+DELETE. You can delete several rows at one time by holding down the CTRL key while you select rows with the mouse and then selecting Delete. If you attempt to delete several rows at once, Trns•port displays two warning messages. The first message asks you to confirm the delete, and the second message identifies the number of rows that will be deleted.

> 📄   Note: If you want to save a temporary copy of the PES Worksheet while you are working in the Worksheet, choose Temporary Save from the File menu. See "Saving Information" in Section 3.8 for more information on Temporary Save.

3.4 Adding Information to the Worksheet

To enter information in the Worksheet you simply click in a row and enter values for each column in the row. When you open an empty worksheet you need to insert a row before you can begin working in the Worksheet. (See Section 3.3 Adding, Inserting or Deleting Row). You can add or change data in most blank column fields (except those fields calculated by Trns•port) or fields with red data. You cannot change blue field values.

Some of the column fields, such as category number and item number, have down arrows at the bottom. You can click on the arrow to view supporting reference data and select appropriate values.

You can use filter and sort to help you find the information you are looking for. To save time when adding items to a project, you can create a default filter that will automatically filter the list to show only those items with which you typically work.

If a column does not have an arrow displayed at the bottom, you must enter values directly into those fields.

> 📄   Note: You cannot access the blue values, such as the item description. Trns•port automatically calculates and enters values for these fields.

You need to enter several fields in the worksheet in order to save the data in the worksheet. You might need to scroll to the right to find some of these required fields: Category Number, Item Number, Line Number, and Estimated Unit Price.

The Supplemental Description fields are each 40 characters long. Use them to identify miscellaneous items or to extend the definition of the standard item. These descriptions stay with the items throughout the life of the project.

You can price items manually in the PES Worksheet by entering prices in the Estimated Unit Price field.

3.5 Entering Data in a Range of Cells

You can select Range Fill from the Edit menu to enter values in columns. If you add or change information in a column you can select cells in the column and copy the value down or up in the selected portion of the column. Range Fill is a valuable way to enter category numbers or item estimate numbers multiple times. You enter the value once and then copy the value in all related records (see Figure 3-4).
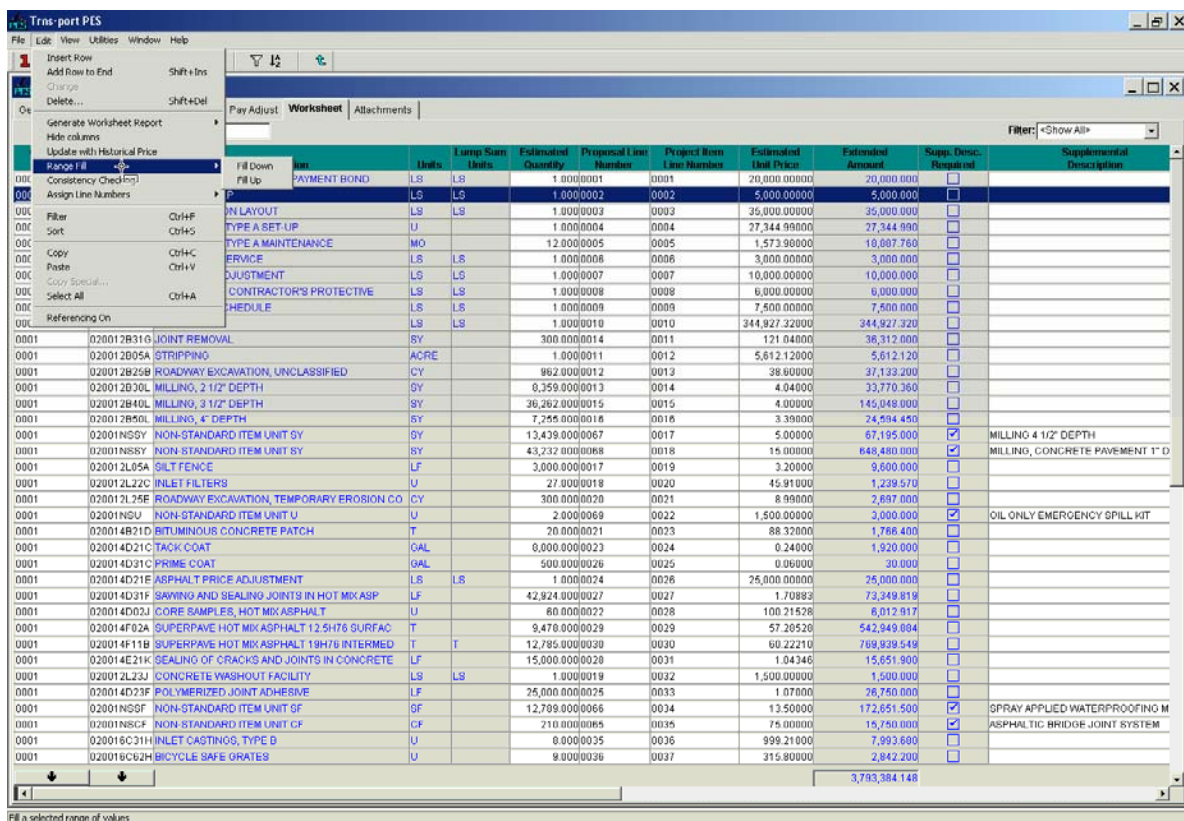
Figure 3-4. Range Fill on the Edit Menu

To select a portion of a column, click in the top left corner of the box with the value you want to copy down or up the column. If your mouse pointer displays as an I-beam, move it around the top left corner until it displays as an arrow again. When the mouse pointer displays as an arrow, hold down the left mouse button and drag up or down to select other cells in the column. To select an entire column, click once in the column title. Select Range Fill from the Edit menu and choose Fill Up or Fill Down. Trns•port populates all the selected fields with the value from the first cell.

📄 Note: The row of data that contains the value you are using to enter the values for other records will remain highlighted throughout this process. Other data in the row is not affected.

3.6 Checking Data Consistency

You can check the consistency of data in the PES Worksheet before you save. (Trns•port does not save data until you choose Update Database from the File menu.)

Select Consistency Checking from the Edit menu to check the consistency of the data in the Worksheet. For all the fields that have identical Category Number and Project Item Line Number values it checks that the estimated item columns (Estimated Unit Price, Item Number, Supplemental Description, Supplemental Description Part Two, Price Source, Price Lock Flag) have identical values.

Trns•port runs through the validations, but does not save the file. If Trns•port finds an error, it displays the cursor in one of the cells with an error and indicates the error in a pop-up window.

3.7 Assigning Estimate Line Numbers

You can manually enter project item and breakdown item line numbers or let Trns•port enter them automatically. You must assign line numbers to all rows before you can permanently save the Worksheet.

To enter the Line Number field in the Worksheet automatically, select Assign Line Numbers from the Edit menu and choose Project Items.

This option sequentially numbers all project items.

3.8 Saving Information

If you want to save a temporary copy of the PES Worksheet while you are working in the Worksheet, choose Temporary Save from the File menu. You can use Temporary Save frequently to protect information you've entered in the worksheet from a power failure or other problems that can occur before you update the database.

Only one temporary version of the worksheet is allowed per worksheet, however, you can temporarily save several different worksheets using the Temporary Save option.

📄 Note: Temporary Save locks selected records in a temporary format. No one can access the selected records except the person who locked them; therefore, use this option with care.

Trns•port will not validate fields until you choose Update Database from the File menu. When you perform this action, Trns•port deletes any existing temporary version of the worksheet.

To save the data in the Worksheet, select Update Database from the File menu. Each time you choose Update Database from the File menu Trns•port validates the Worksheet fields.

Trns•port validates all fields as it updates the tables. A blank row, which cannot be verified, generates an error message for this reason; be sure to delete all blank rows from the Worksheet before you update the database.   When you update the database, Trns•port performs calculations and checks data for consistency (see 3.6 Checking Data Consistency). For example, two items cannot have the same breakdown number and breakdown item line number; Trns•port checks to be sure each item has a unique

combination of values in these two fields.

> 📄 Note: Use Save Folder frequently to save your changes in case of a power failure or program error. By doing so, you will only have to enter the data you entered since the last save if a problem occurs.

If you enter incorrect or insufficient information in the Worksheet, Trns•port displays an error message like the one in Figure 3-5. You must correct any errors before it will save the data.

```
┌─────────────────────────────────────────────────────────────┐
│ Error                                                  [×]   │
├─────────────────────────────────────────────────────────────┤
│                                                             │
│  Project Item Line Number cannot be empty for consistency checking to be valid. │
│                                                             │
│                      ┌──────────┐                           │
│                      │    OK    │                           │
│                      └──────────┘                           │
└─────────────────────────────────────────────────────────────┘
```
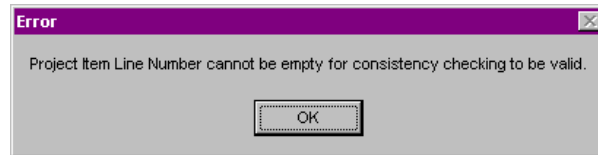
Figure 3-5. Add Item Error Message

If you attempt to close a Worksheet that has been changed but not saved (by clicking the CLOSE button on the button bar or double-clicking the Control menu box), Trns•port displays the PES Worksheet window. Click YES to update the database, NO to ignore the changes and close the worksheet, or CANCEL to return to the worksheet.

3.9 Managing Category Funds

3.9.1 Understanding Funding

You do not need to add funding to each work item, but you must add funding at the category level before you can run the Detail Estimate report. You must identify and enter each funding source for a category separately with the fund's percent participation. Every item in the category should have the same type of funding.

All items in a category must have the same funding scenario. This does not mean that they must be funded by a single source. Trnsport allows for categories to have multiple funding sources. Each source must be identified and the funding participation percentage must be entered. These percentages must add up to 100 percent. Trns•port will not interactively check to make sure the percentages add up, but if they do not an error will occur when you run the Detail Estimate report.

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

To illustrate a more complex arrangement, suppose the local agency will fund 20 percent but only up to $10,000. After that the state must pickup the entire share and the project will be funded 50 percent by state and 50 percent by federal dollars. Figure 3-6 shows how this would be set up in Trns•port with Funding priorities:

Fund	Percent	Dollar Limit	Priority
Fed1	50		1
St1	30		1
Loc1	20	10,000	1
Fed1	50		2
St1	50		2

Figure 3-6. Funding Example

Priorities in funding determine which funds get expended or used up first, which is advantageous when funding sources have dollar limitations such as the local agency in the example.

3.9.2 Adding Funds to Categories

To add funds to categories, select one of the categories from the Categories list window and click FUNDING on the button bar or select **Project Funding List from the right mouse** button menu. Trns•port displays a Funding list window (see Figure 3-7).
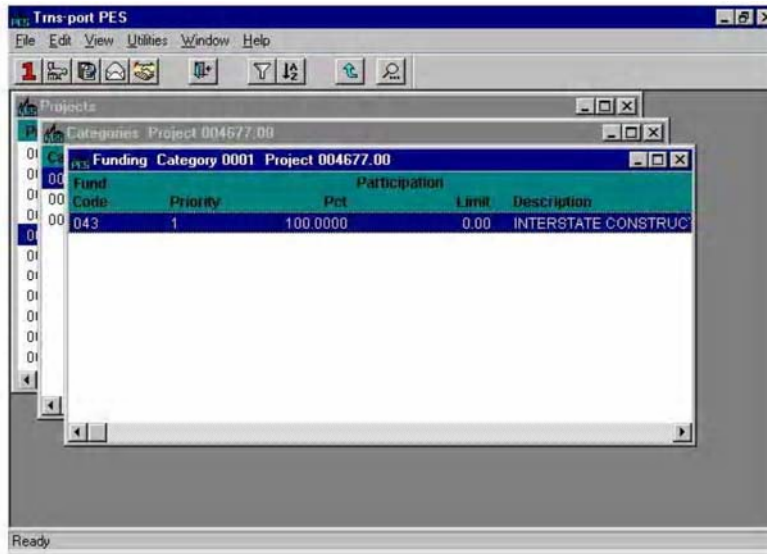
Figure 3-7. Funding List Window

To add funds to the category you selected, press INSERT or select ADD from the right mouse button menu. Trns•port displays the Add Funding Source window (see Figure 3-8).
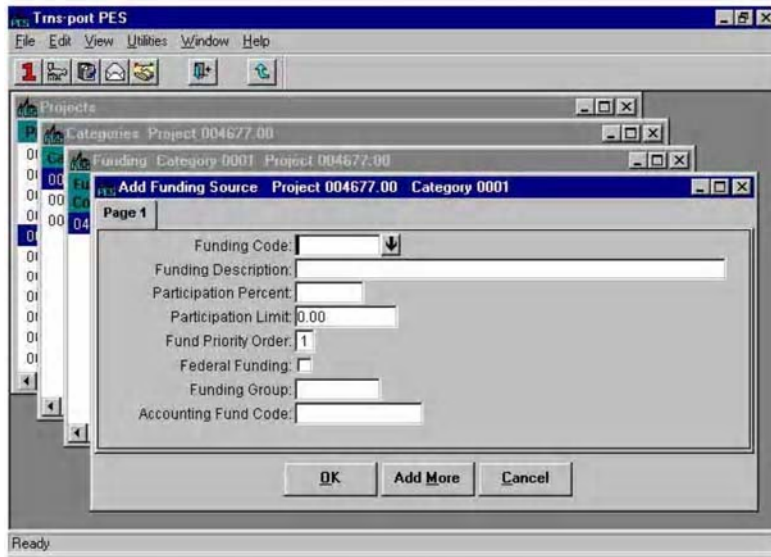
Figure 3-8. Add Funding Source Window

Click ADD MORE on the FUNDING tab until you have funded the category 100 percent. You will have to keep track of the total funding percentage; Trns•port does not check to make sure you have funded each category 100 percent. (see Figure 3-9 and 3-10).
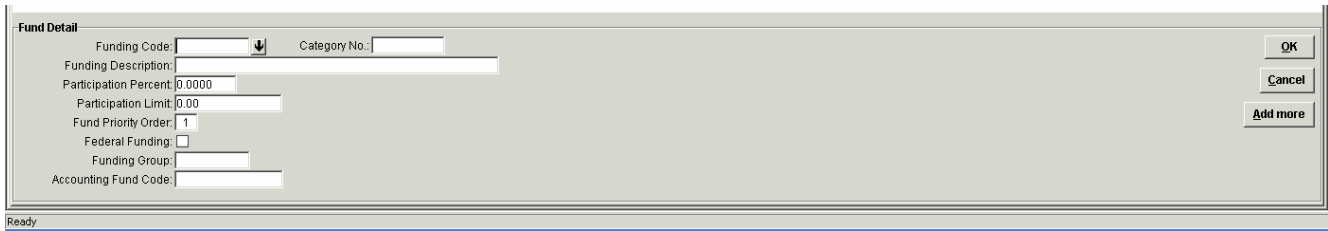
Figure 3-9. Add More Funding Window
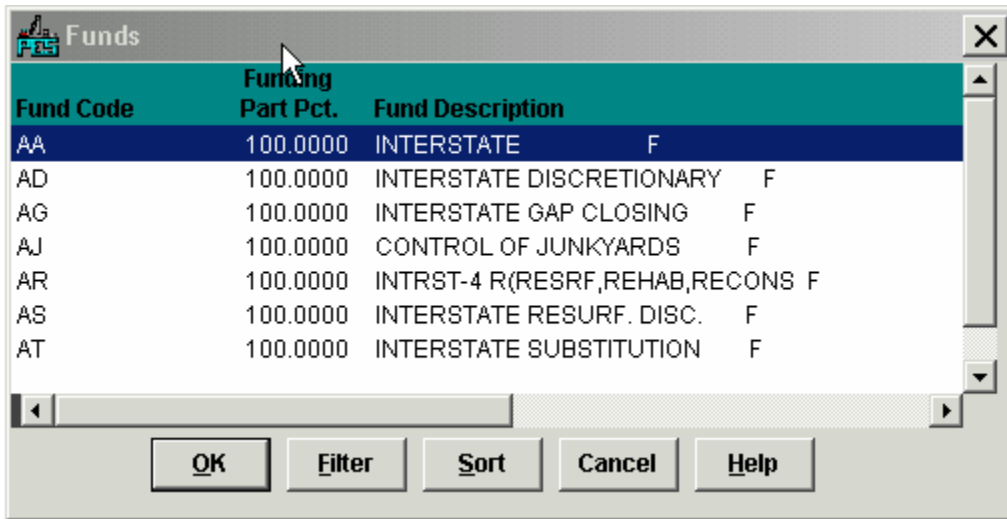
Figure 3-10. Fund List Window

When you have funded the category 100 percent, click OK to save your work. Trns•port displays the new funding record in the list on the FUNDING tab.

Before leaving the tabbed folder window you must save all your changes to the database by clicking on the SAVE button or selecting Save from the File menu.

3.9.3 Changing and Deleting Funding
To change information about an existing funding source, select the funding record in the Funding list window and choose Change from the right mouse button menu. Trnsport displays the Fund Detail window.

Trns•port displays existing information about the funding record. You can change information or add information to blank fields. When you finish making changes, click OK to save your changes or click CANCEL to return to the Funding list window without saving.

To delete an existing funding record, select the record in the Funding list window and choose Delete from the right mouse button menu. Trns•port displays a Delete Warning window. Click YES in each window to continue the delete process.

3.9.4 Changing and Deleting Funding Through the Tabbed Folder Window
It is recommended changes and deletions occur in a "Tabbed Folder" window. To change information about an existing funding source, select the funding record in the list on the FUNDING tab of the Project tabbed folder. Trns•port displays all the existing information about the funding record in the detail area of the FUNDING tab below the list.

You can change information in any of the fields on the FUNDING tab except the blue fields. When you finish making changes, click OK. If you want to return to the FUNDING tab without saving your changes, click CANCEL.
To delete an existing funding record, select the record in the Funding list and choose Delete from the right mouse button menu. Trnsport displays a Delete Warning window.

Click YES in the window to complete the delete process.

Before leaving the tabbed folder window you must save all your changes to the database by clicking the SAVE button on or selecting Save from the File menu.

3.10 Managing Breakdowns and Breakdown Items
Breakdowns **and** Breakdown Items are optional features of the PES, LAS and SiteManager modules. Currently NJ does not breakdown items. If you wish further information on this optional feature it can be found in the standard Trns*Port PES User's Guide.

3.11 Listing Project Estimates
To produce a hard copy listing of project estimate information, select the projects for which you want to list information in the Projects list window. You can select more than one project by holding down CTRL while you select projects with the mouse.

Choose Run Process from the right mouse button menu. Trns•port displays a Processes window.

Select **List Project Estimates** and click OK to run a process or CANCEL to return to the Projects list window without running the process.

4.0 Defining a Proposal

After you define projects and enter project details, you are ready to create a proposal. A Trns•port proposal is one or more projects grouped together for bidding. A proposal is similar to a project in that it contains items of work, but it also contains bidding information (such as DBE and WBE goals). Just as a project groups items into categories, a proposal groups project line items into proposal line items and project categories into proposal sections. Your highway agency might want to combine various projects into a single proposal, but a proposal can also contain a single project of biddable items. Typically NJ only assigns one project to a proposal. Trns•port will roll like items up to a proposal view in the proposal process so bidders only have to view and price items once. Trns•port PES automatically generates proposal line numbers and proposal section numbers.

To create a proposal, you do not have to define all the proposal details, just the proposal header information. You tell Trns•port which projects you want to assign to the proposal and then allow Trns•port to create all the proposal details for you. After you create the proposal, you will need to assign it to a bid letting and produce the proposal documents.

4.1 Proposal Header

To define a proposal header record, you need to open a proposal list and add information for a new proposal record.

Click the PROPOSALS button to open the Proposals list window (see Figure 4-1).
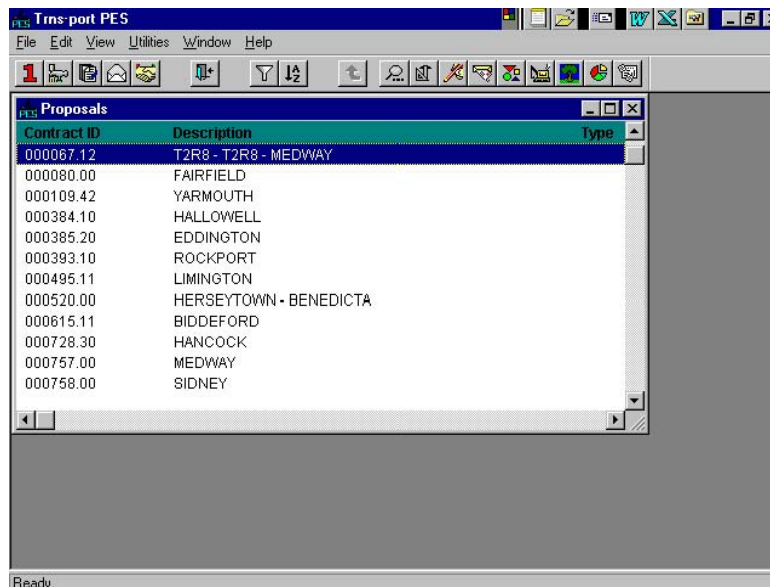
Figure 4-1. Proposals List Window

4.1.1 Adding a New Proposal Header Record Through the Proposal Window

To add a new proposal, press INSERT or choose **Add** from the right mouse button menu. Trns•port displays the first page of the Add Proposal detail window (see Figure 4-2).
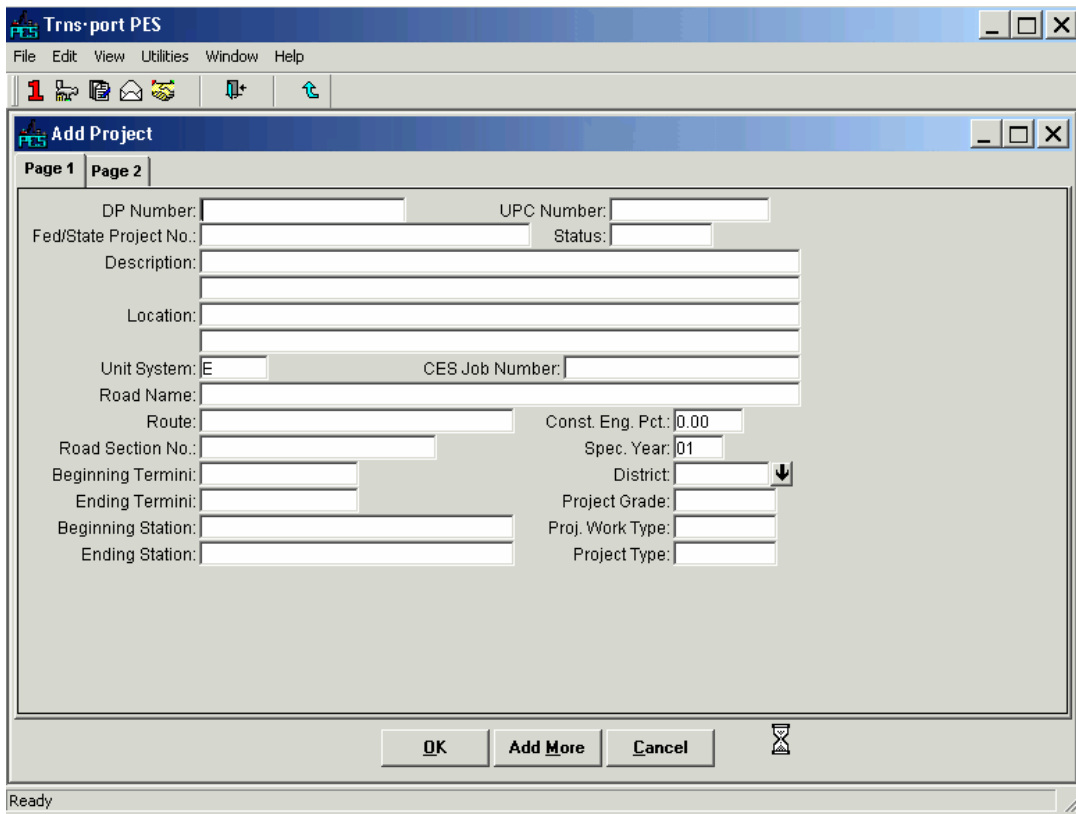
Figure 4-2. Page 1 of Add Proposal Window

To create a complete record you must enter information in the fields listed in section 4.1.2.   Click the PAGE 2 tab to display more proposal fields (see Figure 4-3).
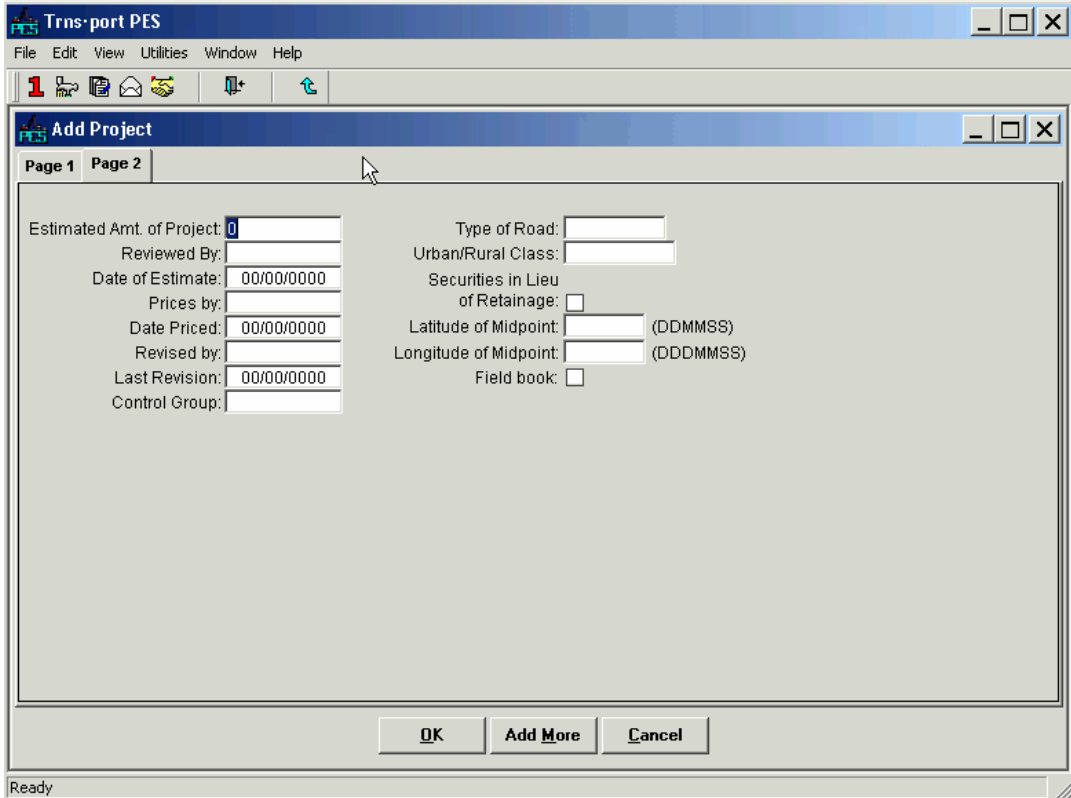
Figure 4-3. Page 2 of Add Proposal Window

Click OK to add the new proposal to the Trns•port database. Trns•port displays the new proposal in the Proposal list window.

4.1.2 Adding a New Proposal Header Record Through the Tabbed Folder Window

Adding a new proposal header record though the Tabbed Folder window is a recommended method. To add a new proposal, select any Proposal in the Proposals list window and choose **Tabbed Folder Add** from the right mouse button menu.

Trns•port displays the GENERAL tab of the Add Proposal tabbed folder window as shown in Figure 4-4.
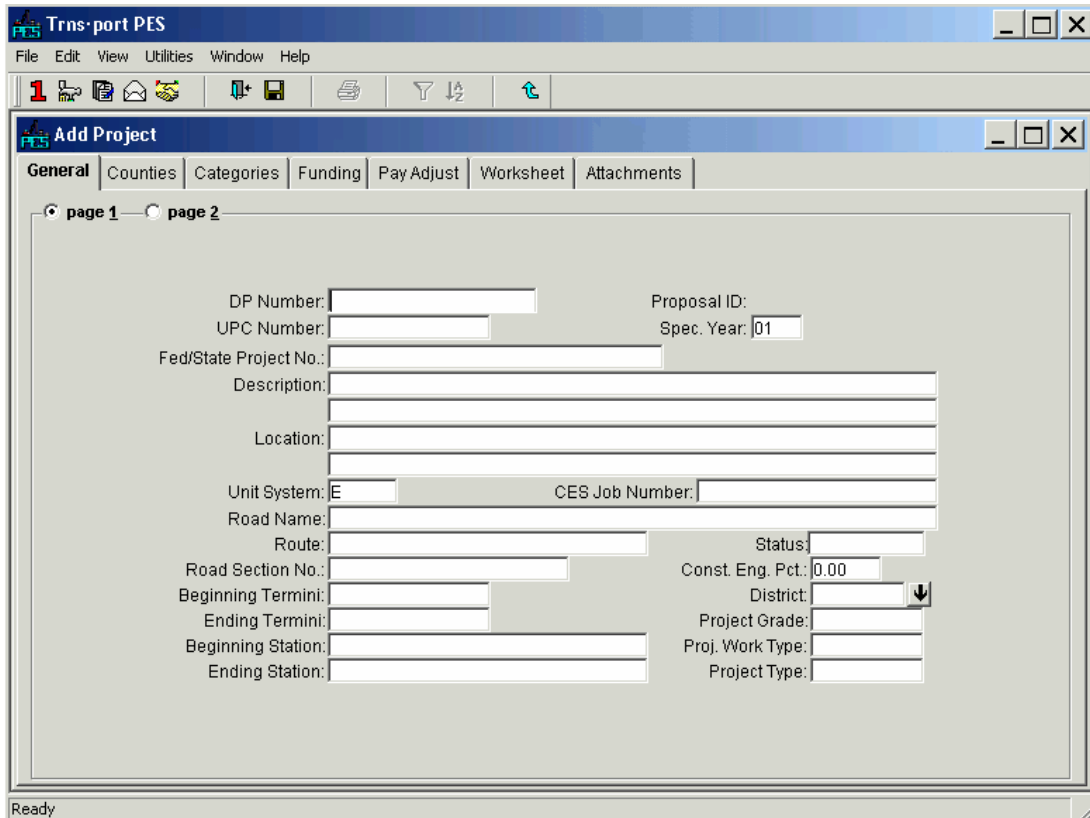
Figure 4-4. General Tab of the Add Proposal Tabbed Folder Window

The GENERAL tab contains general information fields used for identifying the proposal on two pages. To create a complete record you must enter information in these fields:

DP Number	A unique identifier for a proposal or contract. Enter the DP Number.
Counties	You can enter up to four counties for each proposal (select from the drop-down list). Only the first county is required. Trns•port prints this information on some reports, but does not use it in processing.
Description	A short description of the proposal.

Primary District	The primary district in which the work for a contractor project will be performed. Enter the NJDOT Region.
Spec Year	This field identifies the specification year item list used on the project or proposal.

You are not required to, but you can enter information in these fields to record additional information about a proposal:

Bid Bond	A dollar amount required to bond contractors. This field is printed on some Trns•port reports but not otherwise used in any processing. (Your highway agency might choose not to use this field if bid bonds are calculated on a contract percentage basis instead of a set dollar amount.)
Cont Alt ID 1	You can use this field and Cont Alt ID 2 to store identifiers your agency will use for this contract in addition to the Contract ID Trns•port requires. Trns•port does not use this field in any Trns•port processing.
Cont Alt ID 2	You can use this field and Cont Alt ID 1 to store identifiers your agency will use for this contract in addition to the Contract ID Trns•port requires. Trns•port does not use this field in any Trns•port processing.
Contract Type	A value, which must be selected from the attached CONTTYP code table, that your agency can use to store a classification of the type of contract this proposal will become (for example, a safety contract). Trns•port prints this field on some reports but does not use it in processing.
Contract Work Type	A value, which must be selected from the attached WRKTYP code table, which your agency can use to store a classification for the work type for this contract.
Contracting Class	A value, which must be selected from the attached CONTCLS table, which indicates the class of contract.
Control Group	A group of users who can access the same set of projects, proposals, or contracts (for example, only users in the Aeronautics control group can access Aeronautics projects). Each control group can only view, change, and delete projects, contracts, or proposals in their own control group. To pass a project, contract, or proposal to another control group for processing, a user can change their control group code to the new group code. When the user saves the project, contract, or proposal, the original control group will no longer have access.
Controlling PCN	Indicates which project is the controlling project in a multi-project contract. Enter the DP# in this field to automatically populate the proposal fields.

Cost of Plans	Used for planholder invoicing in the LAS module. Trns•port will bill this cost to purchasers of complete plans for a proposal.
Cost of Proposal	Used for planholder invoicing in the LAS module. Trns•port will bill this cost to purchasers of plans for this proposal. The next fields—Cost of Plans, Cost without X-Section, and Cost Per Plan Sheet—are used for the same purpose.
Cost per Plan Sheet	Used for planholder invoicing in the LAS module. Trns•port will bill this cost to purchasers of plans with cross-sections for this proposal.
Cost w/o X-Section	Used for planholder invoicing in the LAS module. Trns•port will bill this cost to purchasers of complete plans without cross references for this proposal.
DBE Goals	A value, which must be selected from the attached DBENOTE code table that indicates which of the two goals described above apply to this proposal. If you choose NONE, Trns•port will not print goals on any report. If you choose DBE, Trns•port will only print the DBE/MBE goal and label it a DBE goal. If you choose BOTH, Trns•port will print both the DBE/MBE goal (labeled as an MBE goal) and the WBE goal.
DBE/MBE Goal (PCT)	A percentage goal set for disadvantaged (DBE) or minority (MBE) business enterprises for a proposal.
Federal/State Project Number	The federal or state project number identifying a project, proposal or contract. In general, a prime project and all the projects comprising it should have the same Federal State Project number although this is not enforced by Trns•port.
Highway Number	The identifier for the road being worked on in a project.
Highway Type	A value, which must be selected from the attached HWYTYP code table, that indicates the type of road being worked on (for example, asphalt, concrete, or dirt or two-lane or four-lane limited access).
Last Addendum Number	The last addendum number used for a proposal. Trns•port enters this field automatically.
Last Description Number	Trns•port enters this field automatically when you enter long descriptions.
Location	The site where work is being performed for the proposal.
Previously Let As CONTID	Indicates the contract ID under which a proposal was previously let.

Proposal Fund Type	A value, which must be selected from the attached FUNDTYP code table, which indicates the kind of funding used for the proposal.
Proposal Type	A value, which must be selected from the attached PROPTYP code table, which indicates the type of proposal (for example, a proposal specifically for small businesses).
Qualification Class	A classification of work for which a vendor is qualified.
Road System	A coded value indicating the road system of which this highway is a part (for example, interstate or federal, state or county highway).
Section Assignment	Flag telling Trns•port if you want to assign project categories to proposal sections automatically or do it yourself manually by entering section numbers in the category records. The default value is Y, which means Trns•port will automatically assign categories to sections.
Set Aside Proposal	A value, which must be selected from the attached SETASID code table, that indicates you have set aside a proposal for a particular purpose (for example, to provide contracts to small, minority-owned businesses).
Special Provisions	Flag used to tell Trns•port if you will assign special provisions to this proposal that it should print with the proposal schedule. The default value is N (you have assigned no special provisions).
Supplemental Spec Year	Can be used by your agency to denote a supplemental specification year in addition to the primary specification year. Trns•port does not use this field in any processing
WBE Goal (PCT)	A percentage amount indicating the goal your agency has set for women business enterprises for the proposal.

When you finish adding information to Page 1, click the Page 2 option button located in the upper left corner of the GENERAL tab to move to Page 2 (see Figure 4-5).

Figure 4-5. Page 2 of the Add Proposal Tabbed Folder Window

When you have finished adding information, save the new proposal to the Trns•port database by clicking the SAVE button or selecting **Save** from the **File** menu. Trns•port displays the new proposal in the Proposal list window.

4.1.3 Changing Proposal Header Information in the Proposals Window

To change information about an existing proposal, select the proposal in the Proposals list window and then choose **Change** from the right mouse button menu. Trns•port displays a Proposal window.

You can add or change information in any fields except Contract ID. When you finish making changes, click OK to save your changes or CANCEL to return to the Proposals list window without saving.

4.1.4 Changing Proposal Header Information in the Tabbed Folder Window

To change information about an existing proposal, select the proposal in the Proposals list window and then choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Proposal tabbed folder window with all known information.

You can add or change information in any fields except Contract ID. When you finish making changes, click OK to save your changes or CANCEL to return to the Proposals list window without saving.

4.2 Associating Projects with a Proposal

To associate projects with a proposal, select the proposal from the Proposals list window to which you want to add projects. Then select **Proposal Project List** from the right mouse button menu (or click the PROJECTS button) to display the Proposal Projects list window of all Trns•port projects that match your control group.
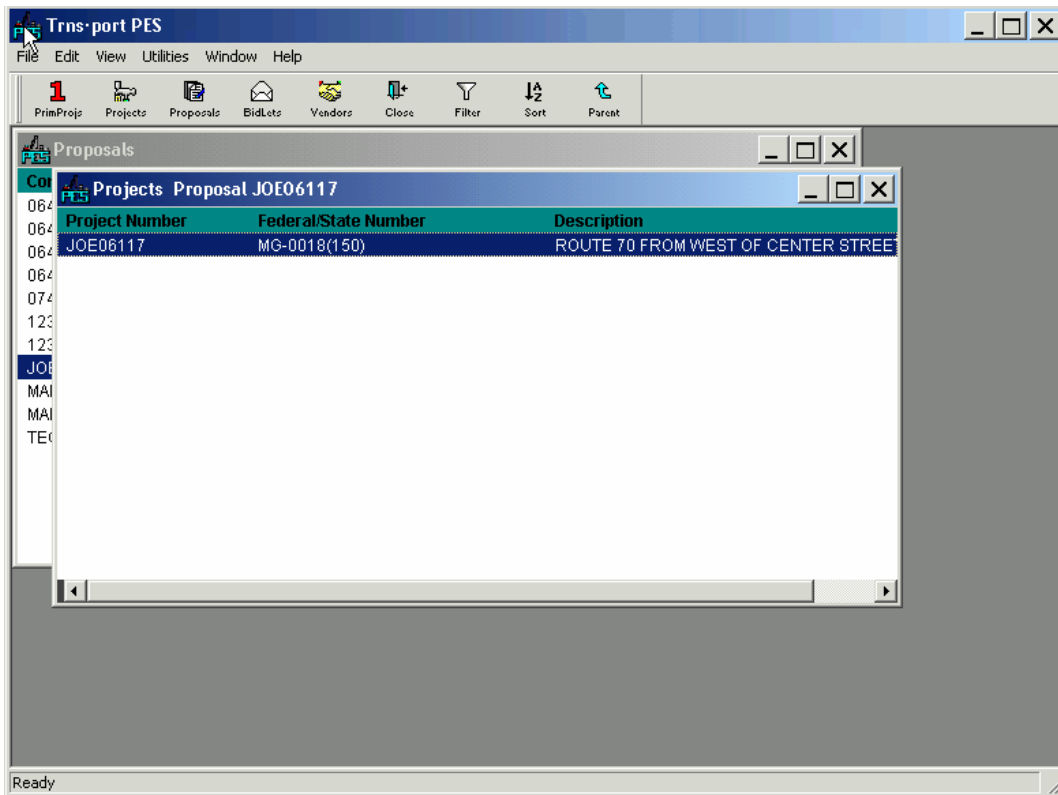
Figure 4-6. Proposal Projects List Window

When you assign a project to a proposal, you tell Trns•port to associate the selected project with the originally selected proposal. Press INSERT or select **Add** from the right mouse menu to display the Add Projects list window (see Figure 4-6).
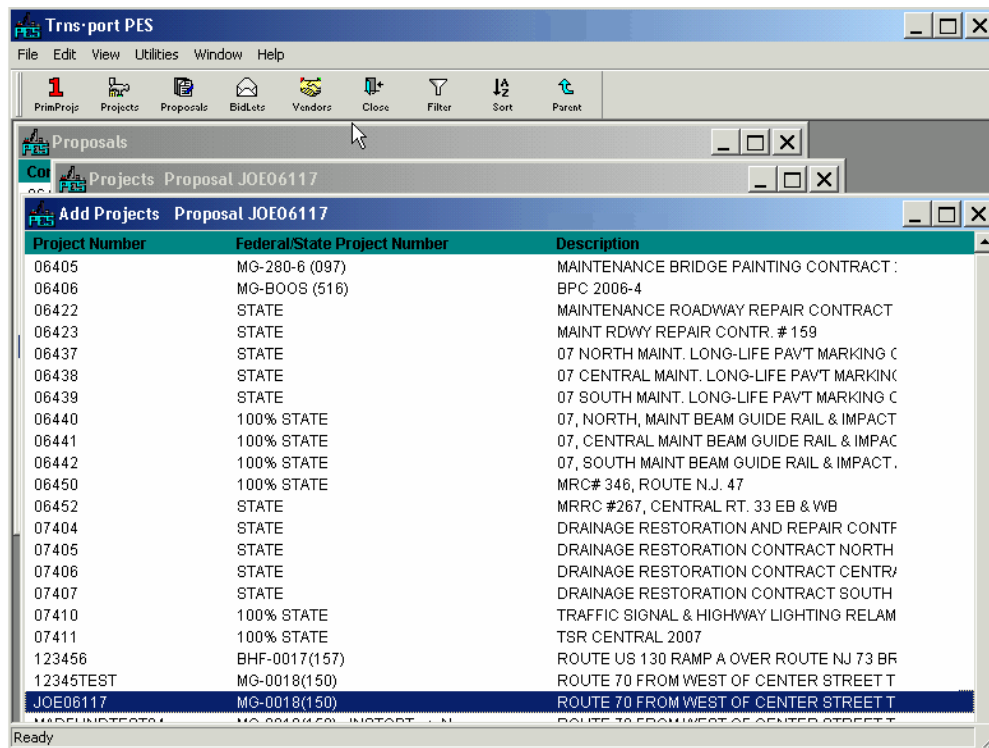
Figure 4-7. Proposal Add Projects List Window

Select a project to add to the proposal. You can select more than one project by holding down CTRL while you select projects with the mouse. When you finish selecting projects, press INSERT to add the projects to the proposal. Click the CLOSE button on the button bar to close the Proposal Add Projects list window. Trns•port displays the projects you selected to add to the proposal in the Proposal Projects list window (see Figure 4-7).

4.2.1 Associating Projects with a Proposal Through the Tabbed Folder Window

It is recommended the Tabbed Folder Change method be used to make proposal changes. To associate projects with a proposal, select the proposal to which you want to add projects from the Proposals list window. Then select **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Proposal tabbed folder window (see Figure 4-8).
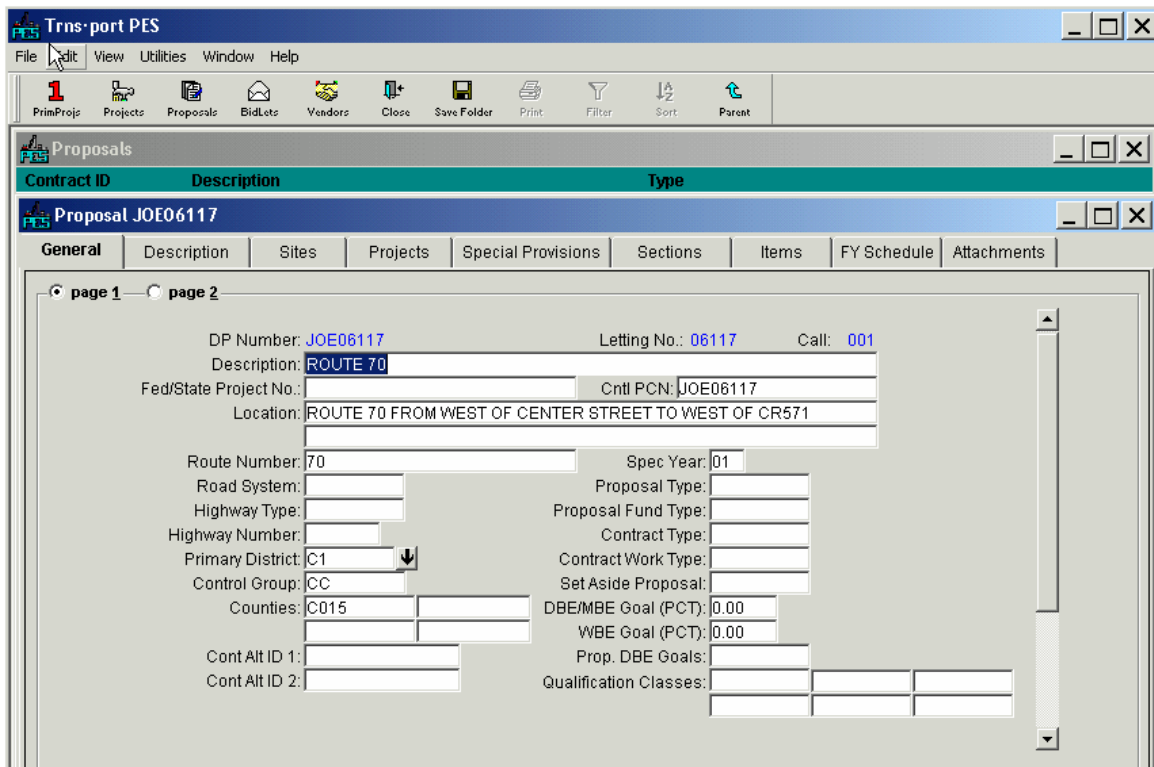
Figure 4-8. Proposal Tabbed Folder Window

When you assign a project to a proposal, you tell Trns•port to associate the selected project with the originally selected proposal. To associate projects with a proposal, click the PROJECTS tab. Trns•port displays the PROJECTS tab window (see Figure 4-9).
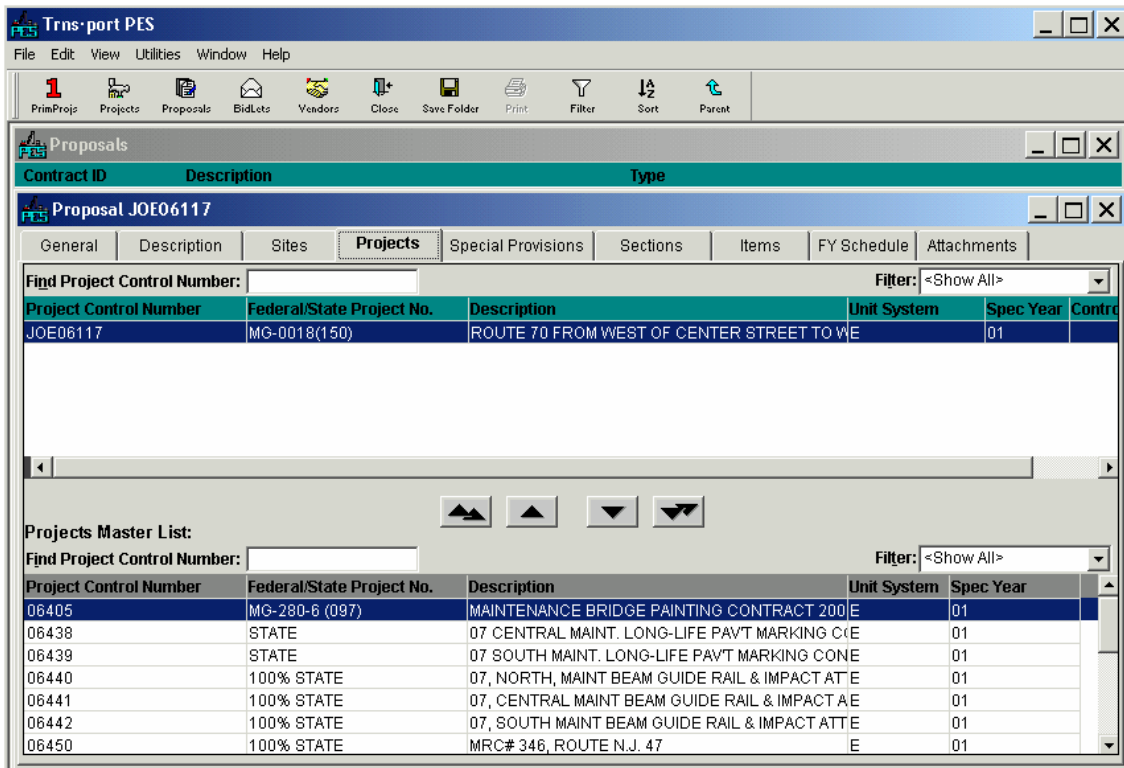
Figure 4-9. Projects Tab on the Proposal Tabbed Folder Window

The top part of the PROJECTS tab contains a list of all the existing projects associated with the proposal. The bottom part of the PROJECTS tab is a master list of projects from which you can choose to add to your proposal. This master list will contain only those projects that meet these criteria:

All the projects have the same spec year as the proposal.

All the projects are in your control group.

None of the projects have been assigned to another proposal.

All the projects match the Unit System of any other projects already assigned to the proposal.

You can view all the details of any project listed on the PROJECTS tab by clicking on the project record and selecting **Zoom** from the right mouse button menu.

To add a project to the proposal you selected, select the project in the master list and click the ADD SELECTED button. Trns•port displays the project in the list of projects for the proposal.
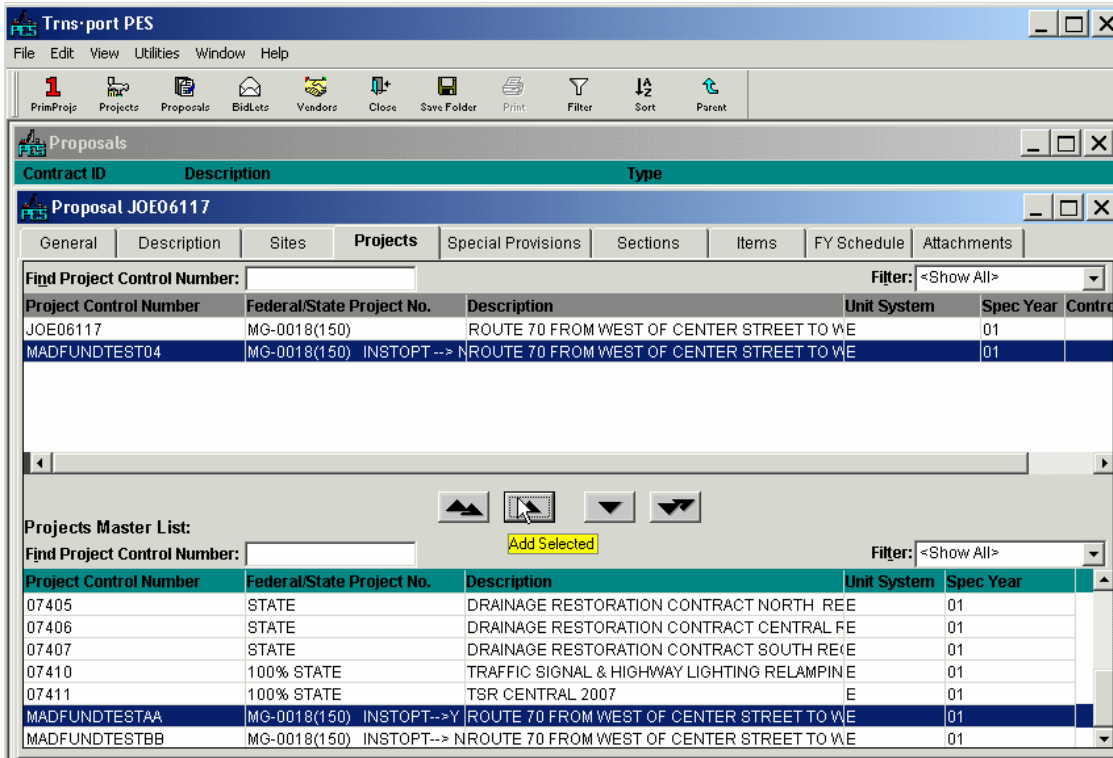
Figure 4-10. Projects Tab on the Proposal Tabbed Folder Window

You can select more than one project by holding down CTRL while you select projects with the mouse, or you can add all the projects by clicking the ADD ALL button (see Figure 4-10).

When you have finished adding projects to the proposal, save your changes to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

4.3 Deleting Projects from a Proposal

To delete projects from a proposal, first select a proposal. Then select **Proposal Project List** from the right mouse button menu. Trns•port displays a list of associated projects.

To delete or disassociate projects from a proposal, select the project or projects in the Projects list window and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES in each window to complete the delete process.

You can also delete projects from a proposal while inside the Proposal tabbed folder window. Click the PROJECTS tab. Select the project(s) to be deleted and click the REMOVE SELECTED button. You can delete all the projects associated with the proposal by clicking the REMOVE ALL button.

> **!**   **Caution:** Deleting a project from a proposal after the proposal has been passed from PES to LAS via the LASINIT process will also delete any proposal items that were generated.

4.4 Copying Proposal Information to a New Proposal

The Copy Special command on the Edit menu allows you to copy similarly defined proposals and eliminates the need to reenter data for each new proposal. After you copy the proposal, you can enter any minor changes to the new proposal.

To copy a proposal header and its associated proposal level data to a new proposal, select the proposal you want to copy in the Proposals list window and select **Copy Special** from the **Edit** menu. Trns•port displays the Copy Proposal window (see Figure 4-11).
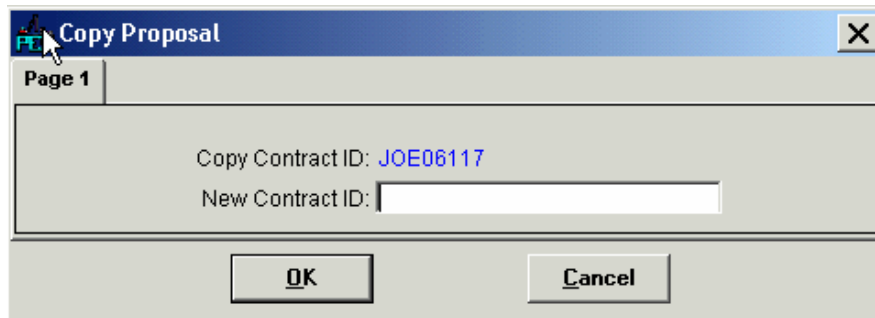
Figure 4-11. **Copy Proposal Window**

Enter the proposal number in the New Proposal Number field and click OK to save the new proposal or CANCEL to return to the Proposals list window without saving.

4.5 Assigning Site Locations

Trns•port maintains all time changes to a contract or proposal at the site level. **Each proposal must have at least one site**. Sites can be set up for the proposal as a whole or as an individual group of time in which to accomplish the work. Sites can be set up for road versus structure work or when a known head to head situation is going to occur and the contractor will have a set number of days to perform the work.

To set the type of work days for the proposal, the length of the project in days or a completion date, and the liquidated damages rate, you must enter a proposal site record.

Each proposal must have at least one site numbered 00 to specify time limitations and liquidated damages for the contract as a whole in Trns•port SiteManager as shown in this example:
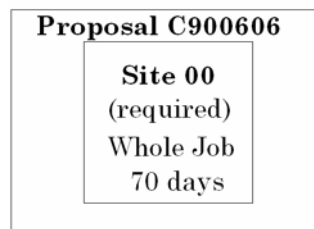
> ▤ **Note**: The Site 00 must be added to the proposal record before it is initialized
> into LAS.

Proposals can have additional sites as well. In the following example, the contractor has 200 days to complete the project, but only 50 days to complete work on each of the bridges.
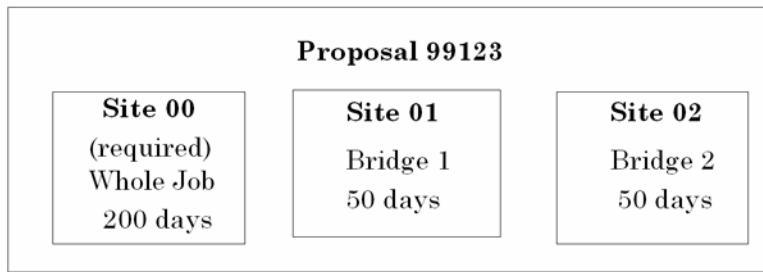
Trns•port allows three types of work days: available days, calendar days, and completion date.

Cost Plus Time bidding information is also entered at the proposal site level. The total number of calendar days you enter for the contract site (Site 00) becomes the contract time component of a Cost Plus Time bid. A valid Cost Plus Time bid also requires that you enter cost per day information in the Road User Cost Per Day field on the Sites tab of the Proposal tabbed folder. See Section 4.5.2 for more information about the Road User Cost Per Day field.

4.5.1 Adding, Changing, and Deleting Site Information

To define the site location for a proposal, select the proposal for which you want to define a site from the Proposals list window and select **Site Locations List** from the right mouse button menu. Trns•port displays the Site Locations list window (see Figure 4-12).
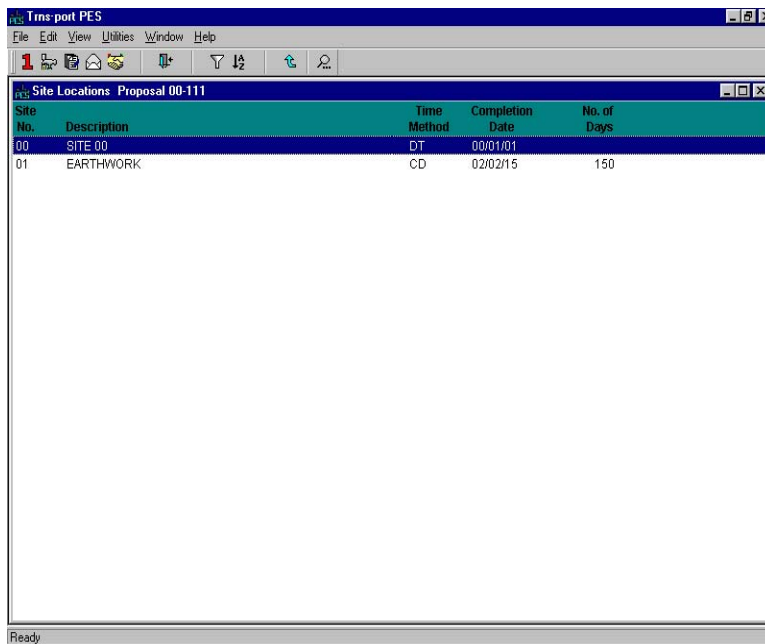
Figure 4-12. Site Locations List Window

To add information about a site location, press INSERT or select **Add** from the right mouse menu to view the Add Site Location detail window (see Figure 4-13).

Figure 4-13. Add Site Location Window

To create a complete record you must enter information in the fields listed in section 4.5.4.

Click OK to save the site location or ADD MORE to add more sites.

Trns•port displays the Site Locations list window for you to view the sites you entered. Click the CLOSE button to close the window and return to the Proposals list window.

4.5.2 Changing Site Information

To change information about an existing proposal site, select the site record in the Site Locations list window and choose **Change** from the right mouse button menu. Trns•port displays a Site Location detail window.

You can add or change information in any field except Site Number. When you finish making changes, click OK to save your changes or click CANCEL to return to the Site Locations list window without saving.

4.5.3 Deleting Site Information

To delete site information, select the site record or records you want to delete in the Site Locations list window and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES in each window to complete the delete process.

4.5.4 Adding, Changing, and Deleting Site Information Through the Tabbed Folder Window

To define the site location for a proposal, select the proposal from the Proposals list window and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Proposal tabbed folder window. Click the SITES tab (see Figure 4-14).
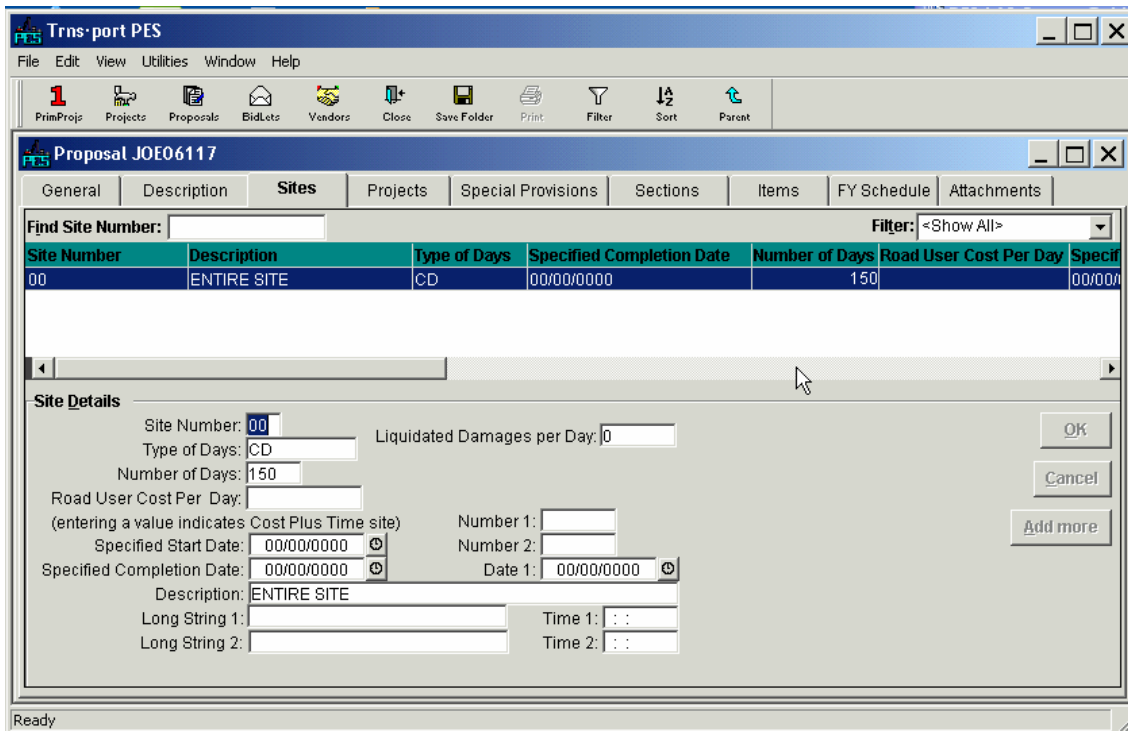
Figure 4-14. Sites Tab on the Proposals Tabbed Folder Window

The top part of the SITES tab contains a list of all the existing sites associated with the proposal. The bottom part of the SITES tab contains detail information for the site currently selected in the list.

To add a site, select Add from the right mouse button menu. Trns•port adds a blank row to the list of sites. You can enter data about the new site into the blank fields displayed in the detail area of the Sites tab.

To create a complete record you must enter information in these fields:

Description	A short description of the site.
Liquidated Damages Per Day	The amount to be charged, in whole dollars, for each day that a contractor exceeds the allowed time for a contract.
Number of Days or Completion Date	The number of available or calendar days that are available for completion of a contract site, or the date that the work is to be completed. For Cost Plus Time bids, the value entered in this field for Site 00 represents the total contract time component of the bid.

Road User Cost Per Day	The cost per day value used to determine the low bidder in a Cost Plus Time bid. A value can only be entered in this field if the value in the Type of Days field is CD or AD. A non-blank value in this field indicates the Site is a Cost Plus Time Site. The value is the cost per day of the inconvenience of the construction.
Site Number	A unique identifying sequence number for each site. Each contract must have a site 00, which represents the contract as a whole, in addition to any other sites.
Type of Days	A coded value indicating whether Trns•port should base contract time on available working days, calendar days or a completion date.

You are not required to, but you can enter information in these fields to record additional information about a site:

Specified Completion Date	The projected date when the contractor will complete work for a given site.
Specified Start Date	The project date when the contractor will start work on a given site.

When you have finished adding information, click OK to save the site location or ADD MORE to add more sites. Trns•port displays the new site in the Site list.

Before leaving the tabbed folder window you must save all your changes to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

4.5.5 Changing Site Information

To change information about an existing proposal site, select the site record in the list on the SITES tab of the Proposal tabbed folder window. Trns•port displays all the existing information about the selected site in the detail area of the SITES tab below the list.

You can add or change information in any field except Site Number. To change information, click in a text box and add or delete information. When you finish making changes, click OK. If you want to return to the site list without saving your changes, click CANCEL.

Before leaving the tabbed folder window you must save all your changes to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

4.5.6 Deleting Site Information

To delete site information, select the site record or records you want to delete in the Site list window on the SITES tab and choose **Delete** from the right mouse button menu.

Trns•port displays a Delete Warning window.

Click YES in the window to complete the delete process.

4.6 Entering or Modifying a Long Description of the Proposal

Once you assign site locations, you enter a long description of the proposal. Trns•port allows you to add multiple lines of free-form text to describe the type of work, description, or other relevant information about the proposal. The long description can appear on proposal-related reports.

Select a proposal from the Proposal list window and select **Proposal Description** from the right mouse button menu or click the DESCR button on the button bar. Trns•port displays the Long Description window (see Figure 4-15).
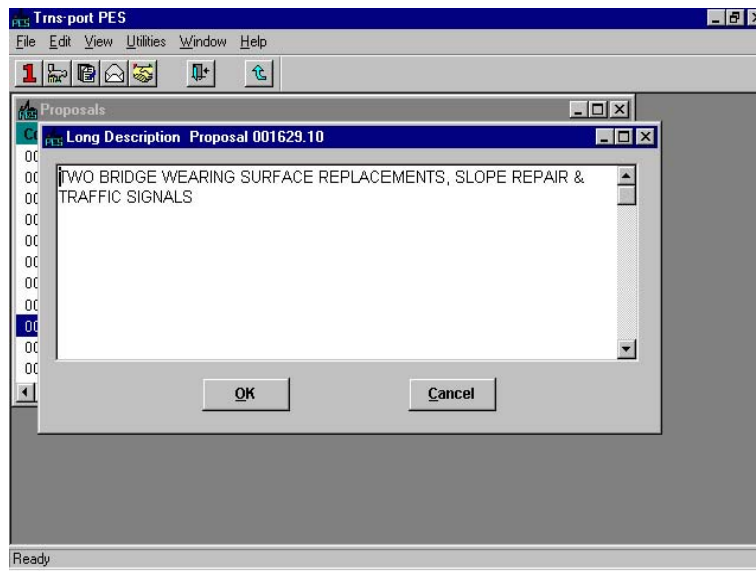
Figure 4-15. Long Description Window

You can enter a description of about 32,000 characters or 400 lines.

Do not press ENTER at the end of each line; Trns•port automatically wraps text to a new line. If you want to start a new paragraph, then press ENTER. You can use the Windows Copy (CTRL+C) and Paste (CTRL+V) commands from the Edit menu to copy and paste text from other windows.

Click OK when you finish entering information and Trns•port displays the Proposals list window.

4.6.1 Entering or Modifying a Long Description of the Proposal Through the Tabbed Folder Window

In the Proposal tabbed folder window, click the DESCRIPTION tab. Trns•port displays the DESCRIPTION tab window (see Figure 4-16).
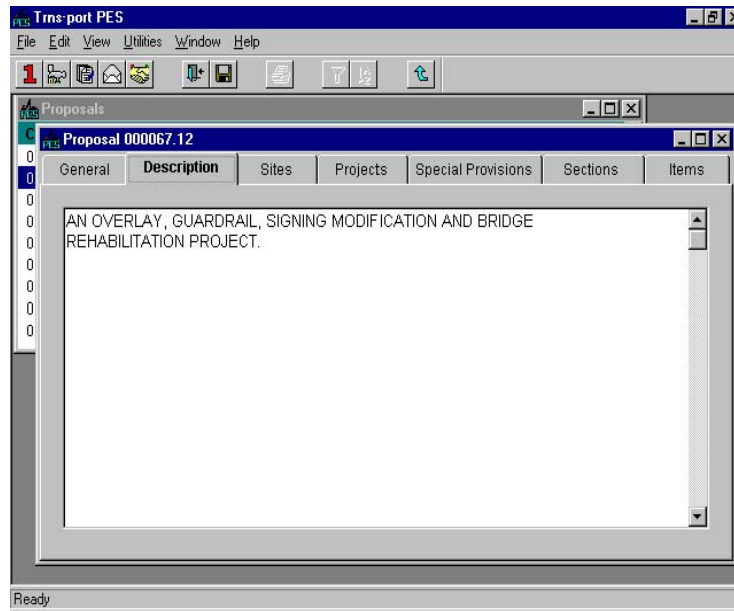
Figure 4-16. Description Tab on the proposal Tabbed Folder Window

You can enter a description of about 32,000 characters or 400 lines.

Do not press ENTER at the end of each line; Trns•port automatically wraps text to a new line. If you want to start a new paragraph, then press ENTER. You can use the Windows Copy (CTRL+C) and Paste (CTRL+V) commands from the Edit menu to copy and paste text from other windows.

Before leaving the tabbed folder window you must save all your changes to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

4.7 Specifying Sections and Line Numbers

You can add, change and delete proposal sections manually, but Trns•port will also generate section and line numbers automatically.

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

Trns•port combines project categories when the categories have the same category types. The combined category becomes a section in the proposal. The Federal Construction Class field controls whether Trns•port combines categories into a single section. If the FEDCCLS field matches, Trns•port will combine categories except when a category is an alternate. Items from alternate categories are combined with alternate categories in other projects only when the alternate codes for the categories in those projects are identical. Trns•port assigns a unique section number to each proposal section. Trns•port updates the database record for every category in that section to reflect the section to which it now belongs.

Trns•port aggregates items within combined categories (that is, proposal section) when the items have the same item number and supplemental description. Trns•port removes items that are members of an alternate item set from the section and places them in a section describing the alternate relationship. If you have designated an item not to fold, Trns•port will not combine it. Trns•port combines alternate items across projects only when the same alternate codes are used in both projects to identify the alternates.

Trns•port does not combine common items if you have flagged the item not to fold.

Currently, it is NJDOT policy to not combine common items.

The aggregation procedure for combining common items is as follows:

Sum the quantities (except for lump-sum items).

Calculate a weighted average of the price estimate (Σ means sum).

$$\text{Price Estimate} = \frac{\Sigma\ QTY*PRICE}{\Sigma\ QTY} \quad \text{(for non-lump-sum items)}$$

Trns•port calculates price estimates for lump-sum items by summing individual item price estimates and retaining the quantity amount of lump sum.

$$\text{Price Estimate} = \Sigma\ \text{Prices (for lump-sum items)}$$

After Trns•port combines like items, it assigns unique proposal line numbers. Trns•port then updates every database item record to reflect the proposal line item number to which the record now belongs.

4.7.1 Adding, Changing, and Deleting a Proposal Section in the Proposal Section Window

If you choose to add sections to a proposal manually, select the proposal in the Proposals list window and choose **Section List** from the right mouse button menu. Trns•port displays a Proposal Sections list window (see Figure 4-17).
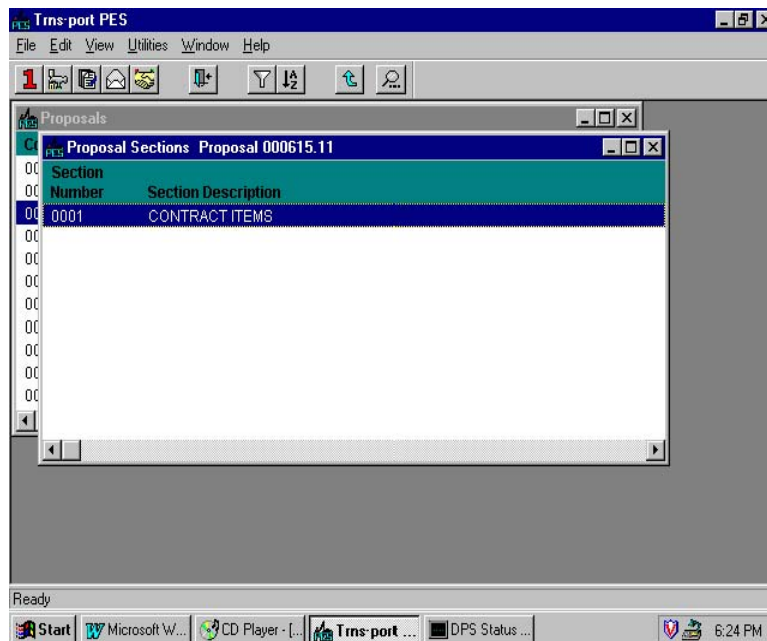
Figure 4-17. Proposal Sections List Window

Press INSERT or choose **Add** from the right mouse button menu. Trns•port displays an Add Proposal Section window (see Figure 4-18).
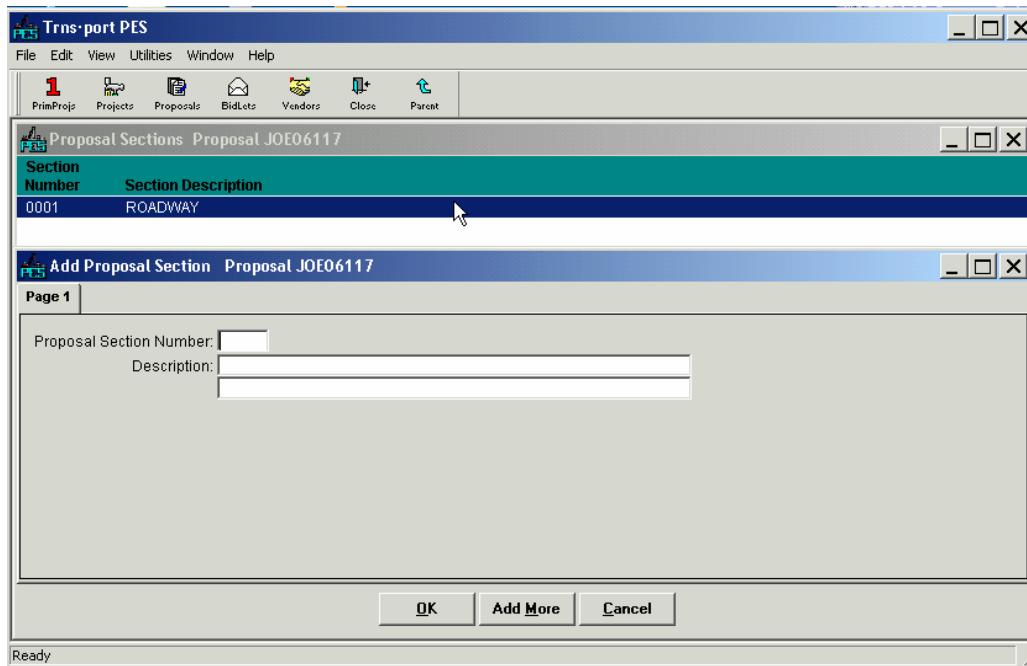
Figure 4-18. **Add Proposal Section Window**

Enter a proposal section number and a description and click OK to add a proposal section, ADD MORE to add another section, or CANCEL to return to the Proposal Sections list window without adding a new section.

4.7.2 Changing a Proposal Section

After Trns•port generates section and line numbers, you can modify the section number record. Trns•port uses the category description of the first category assigned to the section as the section description. To create a unique section, you can change a proposal section's description by selecting the proposal section in the Proposal Sections list window.

Choose **Change** from the right mouse button menu. Trns•port displays a Proposal Section window. Change the description and click OK to save the changes or click CANCEL to return to the Proposal Sections list window without saving.

4.7.3 Deleting a Proposal Section

To delete proposal sections, select the section or sections in the Proposal Sections list window and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window. If you generated the section and line numbers using the automated process, and have since made changes or deletions to the sections or items, you will need to rerun the generate section and line number process to make sure those changes are reflected correctly in the database.

Click YES in each of the windows to complete the delete process.

4.7.4 Adding, Changing, and Deleting a Proposal Section in the Tabbed Folder Window

To add sections through the tabbed folder window, select the proposal in the Proposals list window and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Proposal tabbed folder window. Click the SECTIONS tab (see Figure 4-19).
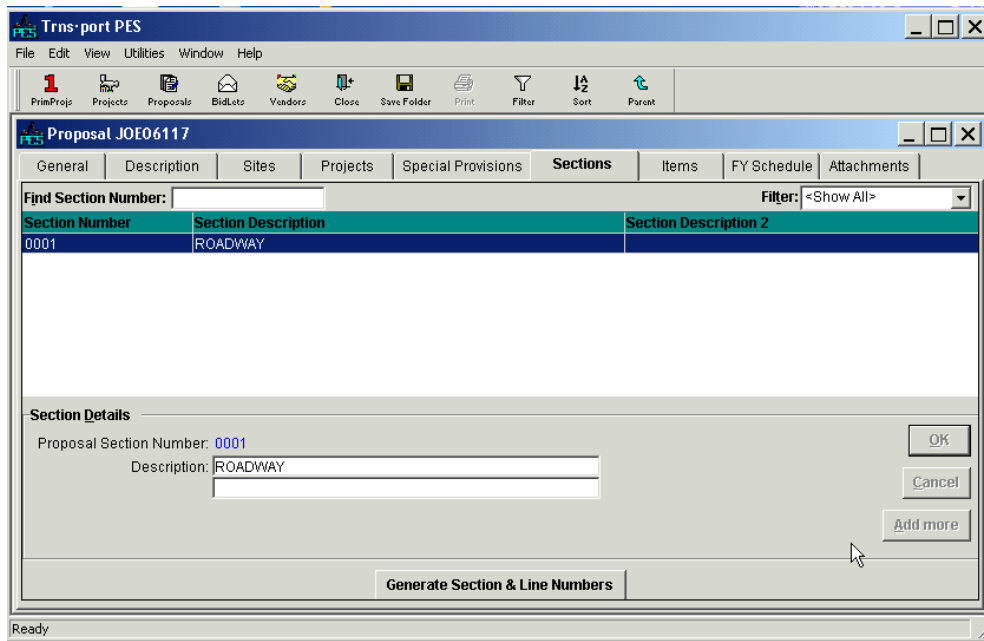
Figure 4-19. Sections Tab on the Proposals Tabbed Folder Window

The top part of the SECTIONS tab contains a list of all the existing sections in the proposal. The bottom part of the SECTIONS tab contains detail information for the section currently selected in the list.

To add a section to the proposal, select **Add** from the right mouse button menu. Trns•port adds a blank row to the list of sections. Enter data into the blank fields displayed in the detail area of the Sections tab. You can also enter data directly into the list fields by selecting **Hide Detail** from the right mouse button menu (see Figure 4-20).
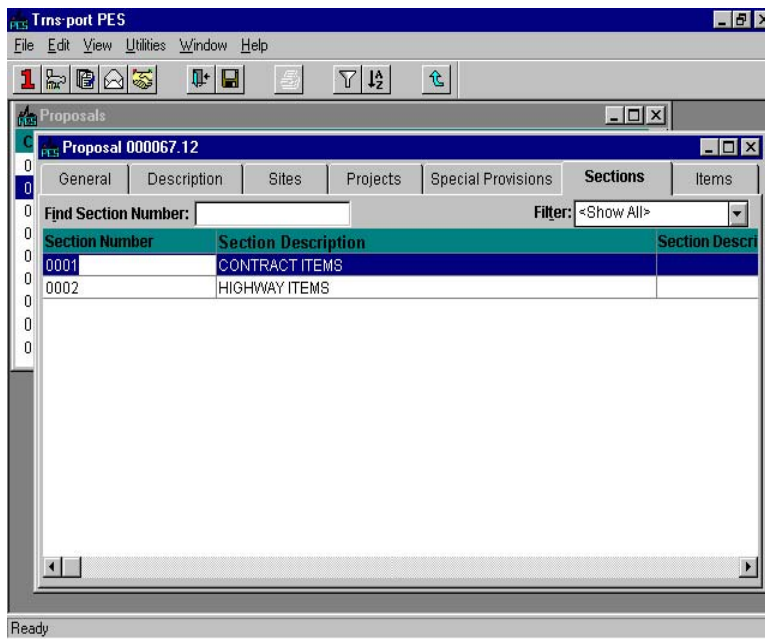
Figure 4-20. Sections Tab With Hide Detail Selected

Enter a proposal section number and a description and click OK to add a proposal section, ADD MORE to add another section, or CANCEL to return to the Proposal Sections list without adding a new section.

Before leaving the tabbed folder window you must save all your changes to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

4.7.5 Changing a Proposal Section

After Trns•port generates section and line numbers, you can modify the section number record. Trns•port uses the category description of the first category assigned to the section as the section description. To create a unique section, you can change a proposal section's description.

Select the proposal section in the list on the SECTIONS tab of the Proposal Tabbed Folder window. Trns•port displays all the existing information about the selected section in the detail area of the SECTIONS tab.

Click in the Description text box and change the description. Click OK to save the changes or CANCEL to return to the Sections list without saving.

Before leaving the tabbed folder window you must save all your changes to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

4.7.6 Deleting a Proposal Section

To delete proposal sections, select the section or sections in the SECTIONS tab and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES in the window to complete the delete process.

4.7.7 Generating Section and Line Numbers

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

> 📄 Note: There are times when generating section and line numbers is not a desired action (example – some M&O proposals where order of lines and items is important). If and when PES prompts to Generate Section and Line Numbers, just click on NO or CANCEL.

You can generate section and lines numbers two ways:

   Select the proposal from the Proposals list window and choose **Run Process** from the right mouse button menu. Trns•port displays the Processes window. Select **Generate Section and Line Numbers** from the Processes window and click OK.

Within the Proposal tabbed folder window, click the SECTIONS tab. Trns•port displays the SECTIONS tab window. Click the GENERATE SECTION AND LINES NUMBERS button.

Trns•port displays the Proposal Generation Option window.

If you check the List Section/Line Number Assignments check box, you can get a hard copy printout of the project item and how they are rolled up to the proposal level.

If you have already set all the process parameters correctly and do not need to make changes to the default values, click SUBMIT to bypass the Process Submission Parameters window.

After Trns•port completes the batch function, you can review the Proposal Line Number-

Section Assignment report. The report shows the proposal sections and line numbers Trns•port created and how they relate to the project(s) and categories that make up the proposal.

In this report, Trns•port combines all the project categories into one or more proposal sections and puts the proposal line numbers in order according to the item numbers they represent.

If you set the Combine with Like Items flag to yes in the Add Item window, each item will only appear once in a proposal section, even if it is listed under more than one category. Items only appear once because Trns•port combines project items with the same item number into single proposal line items, even though the project items are in different categories or projects. Bidders can then bid on a single item. Trns•port rolls up all the quantities for the project items into one proposal line item. If you set the Combine flag to no, Trns•port will not roll up the items.

> ▤ Note: Currently NJ does not combine like items therefore like items should not be allowed to combine.

Because bidders will not bid on non-bid account items (you can set a flag in the project item detail window), Trns•port will omit these items from the proposal report.

4.8 Maintaining Special Provisions

> ▤ Note: NJ is not currently using Special Provisions in Trns•port .This section on Special Provisions is provided for reference only.

Special provisions are special texts or requirements that you can apply to specific proposals. Trns•port maintains a list of special provisions in the Special Provisions List table; thus, the master list of special provisions are separate from the proposals to which they apply. When you add a special provision to a proposal, Trns•port adds an association record to establish a connection between the selected special provision and the selected proposal. If you delete a special provision, Trns•port deletes the association between the special provision and the proposal, not the special provision and text itself.

4.8.1 Adding a Special Provision to a Proposal

To associate special provisions with a proposal, select the proposal to which you want to assign special provisions in the Proposals list window. Click the SPECPROV button or choose **Special Provisions List** from the right mouse button. Trns•port displays the Special Provisions list window, which shows the special provisions currently associated with the proposal (see Figure 4-21).
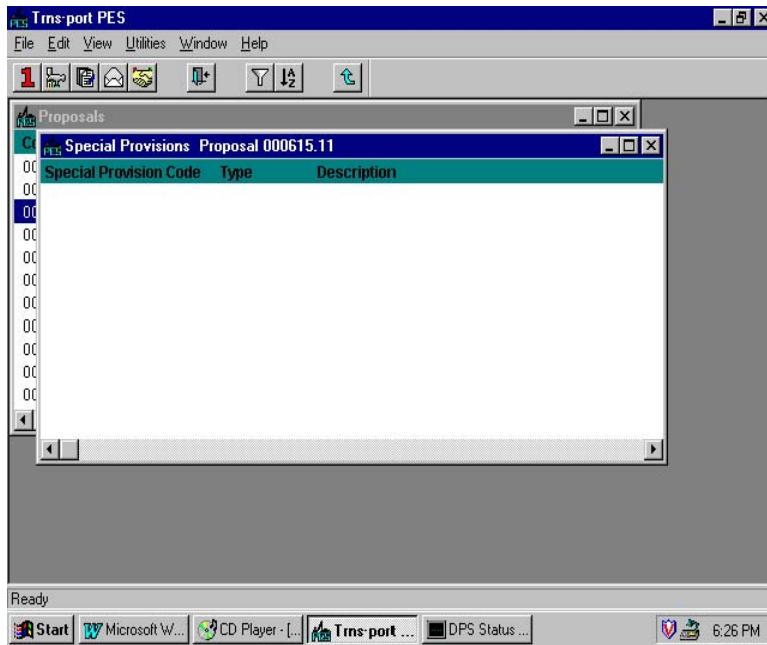
Figure 4-21. Special Provisions List Window

To associate special provisions with a proposal, press INSERT or choose **Add** from the right mouse button menu to display the Add Special Provisions list window, which is the full list of special provisions (see Figure 4-22).
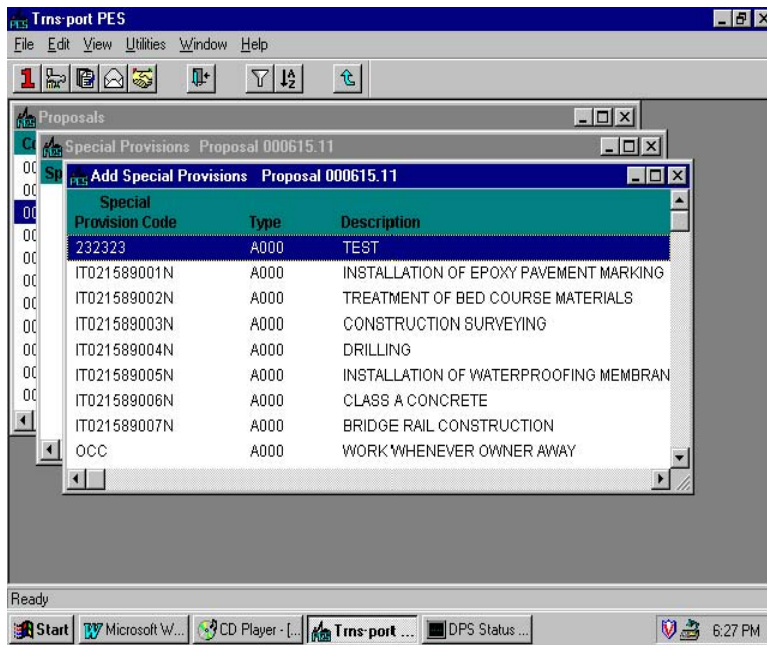
Figure 4-22. Add Special Provisions List Window

Click on a special provision to select it and then press INSERT or select **Add** from the right mouse button menu to associate the special provision with the selected proposal.

You can associate several special provisions at one time by holding down CTRL while you select more than one special provision. Then you can press INSERT to associate the provisions to the selected proposal.

Click the CLOSE button on the button bar to close the Add Special Provisions list window.

Trns•port displays the special provisions you added in the Special Provisions list window.

4.8.2 Adding a Special Provision to a Proposal Through the Tabbed Folder Window

To associate special provisions with a proposal, select the proposal to which you want to assign special provisions in the Proposals list window and select **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Proposal tabbed folder window.

To add a special provision to the proposal, click the SPECIAL PROVISIONS tab. Trns•port displays the SPECIAL PROVISIONS tab window (see Figure 4-23).
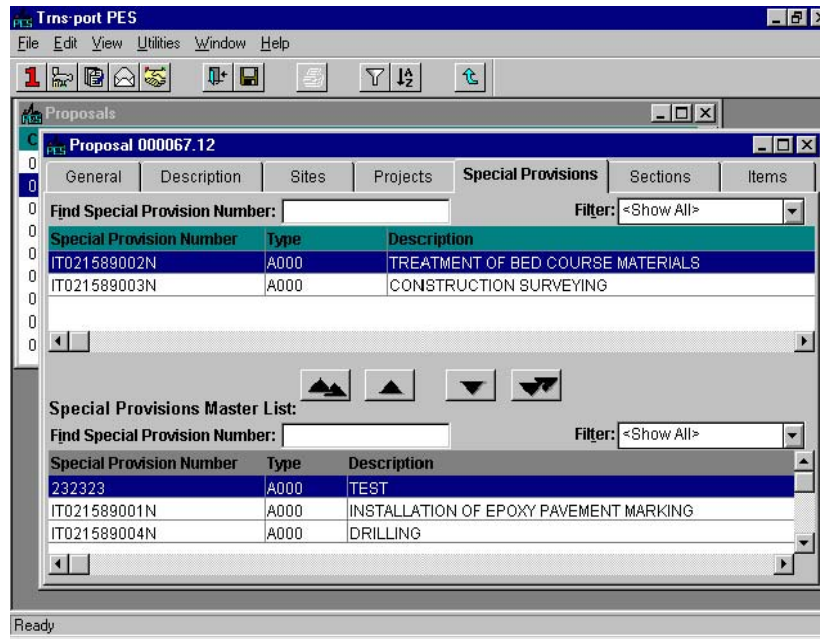
Figure 4-23. **Special Provisions on the Proposal Tabbed Folder Window**

The top part of the SPECIAL PROVISIONS tab contains a list of all the special provisions currently associated with the proposal. The bottom part of the SPECIAL PROVISIONS tab is a master list of special provisions from which you can choose to add to your proposal. This master list will contain all special provisions that are not already associated with this particular proposal.

You can view the long description of any special provision listed on the SPECIAL PROVISIONS tab by clicking on the provision and selecting **View Text** from the right mouse button menu.

To add a special provision to the proposal, select the special provision in the master list and press the ADD SELECTED button.

> 📄 **Note**: You can use the Quick Find text box or the filter on the SPECIAL PROVISIONS tab to quickly locate the record(s) you want.

You can select more than one special provision by holding down CTRL while you select records with the mouse, or you can add all the special provisions by clicking the ADD ALL button.

Trns•port displays the special provisions you added in the Special Provisions list.

When you have finished adding special provisions to the proposal, save your changes to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

4.8.3 Deleting a Special Provision from a Proposal

To delete the association of a special provision with a proposal, select the provision in the list on the SPECIAL PROVISIONS tab and click the REMOVE SELECTED button.

You can select more than one special provision by holding down CTRL while you select records with the mouse, or you can delete all the special provisions by clicking the REMOVE ALL button.

Trns•port displays a Delete Warning window. Click YES in the window to complete the delete process.

When you have finished removing special provisions from the proposal, save your changes to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

4.8.4 Listing Special Provisions

To produce a hard copy listing of special provision information, select the proposal or proposals with special provisions you want to list in the Proposals list window. Then choose **Run Process** from the right mouse button menu. Trns•port displays the Processes list window.

Select **List Proposal Provisions** from the list and click OK. Trns•port displays the Confirm Process Submission window.

Click SUBMIT to run the process.

4.9 Listing Contract Proposals

To produce a hard copy listing of proposal information, select the proposal or proposals in the Proposals list window. Then choose **Run Process** from the right mouse button menu. Trns•port displays the Processes list window.

Select **List Contract Proposals** and click OK to continue the process. Trns•port displays the Confirm Process Submission window.

Click SUBMIT to run the process, PARAMETERS to change process submission parameters, or CANCEL to return to the Proposals list window without running the process.

4.10 Changing the Estimated Price at the Proposal Level

When a proposal has been set up, estimators might want to review the proposal-level prices and quantities. Because of the larger quantity of items at this level, estimated

prices might be changed because of quantity savings or the price might have changed over time. You can view and modify the estimated prices through an editable scroll feature in Trns•port. All modified prices will be propagated back to the original project item price(s).

Follow these steps to change an item's estimated price at the proposal level (see Figure 4-24):

Select a proposal from the Proposals list window.

Click the ITEMS button or select **Proposal Items** from the right mouse menu to display a Proposal Items list window, which shows quantities rolled up to the proposal level.
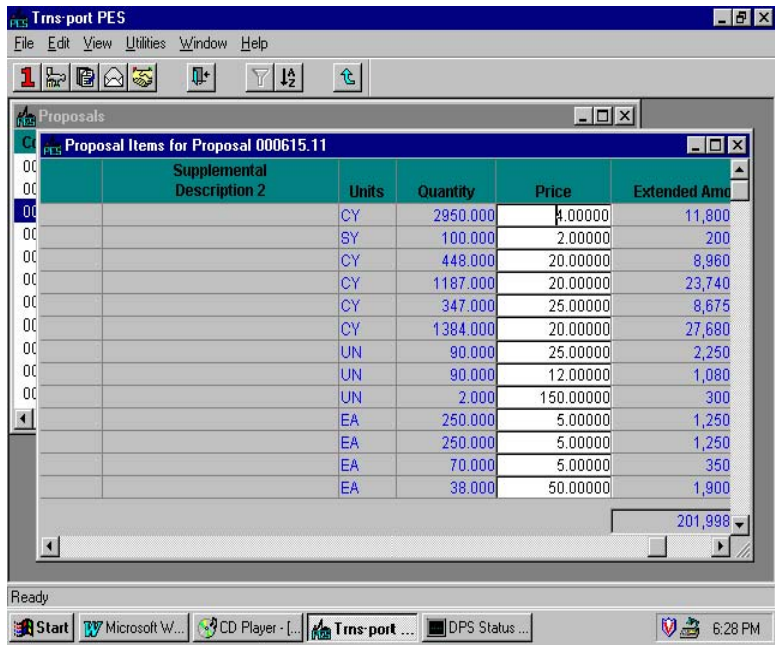
Figure 4-24. Proposal Items List Window

This grid window shows quantities rolled up to the proposal level. If item price estimates were previously specified (with the Generate Bid-Based Prices process or by the estimator), a weighted estimated price for each proposal line item is displayed. This pricing information is computed from the estimated price and quantities of the individual occurrences of the items that were combined into that proposal line item.

The following formula is used to display the weighted prices:

For lump sum items (where Σ means "sum"):

$$\text{Weighted Price} = \Sigma \quad (\text{Quantity times Price})$$

For all other items:

$$\text{Weighted Price} = \frac{\Sigma \; (\text{Quantity times Price})}{\text{Sum of Quantity}}$$

Change the estimated price in the Price field. If you change a price inadvertently, press ESC before you leave that field to revert back to the original price. Trns•port recalculates the extended amount according to the new price you enter.

When you finish making changes, click in the window again. When you try to close the window, Trns•port displays the Proposal Items dialog box.

Click YES to save the new prices, click NO to return to the Proposals list window without changing prices, or click CANCEL to return to the Proposal Items list window to make other changes (see Figure 4-25). When you save, Trns•port will propagate the new prices back to the project estimate item level and breakdown level.

Figure 4-25. Proposal Items Dialog Box

Each proposal line price estimate will be redistributed to each of the project item records that combine into that proposal line item. This formula is used to distribute the prices back to the project item records:

For lump sum items:

$$\text{Stored Price} = \frac{\text{Entered Price}}{\Sigma \ \text{Quantity}}$$

For all other items:

$$\text{Stored Price} = \text{Entered Price}$$

4.10.1 Changing the Estimated Price at the Proposal Level in the Tabbed Folder Window

To change an item's estimated price at the proposal level, select a proposal from the Proposals list window and choose **Tabbed Folder Change** from the right mouse button menu. Click the ITEMS tab. The ITEMS tab contains a list of proposal items with the item quantities rolled up to the proposal level (see Figure 4-26).
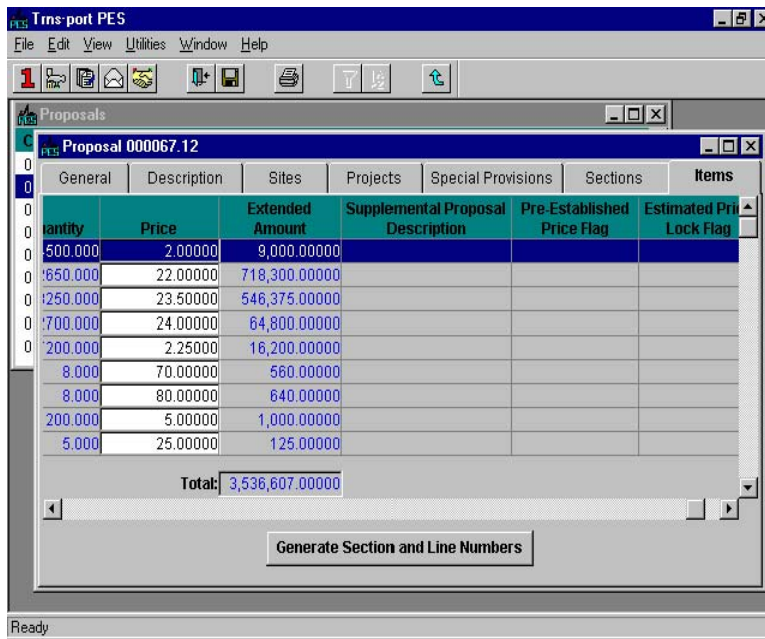
Figure 4-26. Items Tab in the Proposal Tabbed Folder Window

This grid window shows quantities rolled up to the proposal level. If item price estimates

were previously specified (with the Generate Bid-Based Prices process or by the estimator), a weighted estimated price for each proposal line item is displayed. This pricing information is computed from the estimated price and quantities of the individual occurrences of the items that were combined into that proposal line item.

The following formula is used to display the weighted prices:

For lump sum items (where Σ means "sum"):

$$\text{Weighted Price} = \Sigma \quad (\text{Quantity times Price})$$

For all other items:

$$\text{Weighted Price} = \frac{\Sigma \ (\text{Quantity times Price})}{\text{Sum of Quantity}}$$

Change the estimated price in the Price field. If you change a price inadvertently, press ESC before you leave that field to revert back to the original price. Trns•port recalculates the extended amount according to the new price you enter.

Each item listed on the ITEMS tab must have a proposal line number assigned to it in order for Trns•port to update the database with any changes you make to item prices. If line numbers have not been assigned to any of the items associated with your proposal, click the GENERATE SECTION AND LINE NUMBERS button before saving your changes. If you wish to print, click the PRINT button to print the results of this process to a local printer.

When you finish making changes, save the new prices by clicking the SAVE button or selecting **Save** from the **File** menu. Trns•port will propagate the new prices back to the project level and breakdown level.

Each proposal line price estimate will be redistributed to each of the project item records that combine into that proposal line item. This formula is used to distribute the prices back to the project item records:

For lump sum items:

$$\text{Stored Price} = \frac{\text{Entered Price}}{\Sigma \ \text{Quantity}}$$

For all other items:

$$\text{Stored Price} = \text{Entered Price}$$

4.11 Loading the Proposal Item Price Estimates

To load all the proposal item price estimates that have been entered into the Trns•port PES database, you must run a batch process called Load Contract Price Estimates.

The Load Contract Price Estimates process performs edit checks on the entered proposal item price estimates. It verifies that the CONTID is a valid contract identifier, that the referenced proposal items have been defined, and that the item quantity and item number are consistent with those in the Trns•port PES database. The process reports any problems found with the data in an exception report and then updates the Project Item file with the new prices. An estimate item price will not be updated if the price is locked or if there is an addendum item associated with the proposal item.

Before running the Load Contract Price Estimates process, follow these steps to make sure the IO\QPROPRIC\PROPPRIC.DAT file is in the staging area:

Select Download File from the Utilities menu and choose Process I/O File;

Select the QPROPRIC directory;

Verify that the PROPPRIC.DAT file is in the directory;

Click CANCEL.

Select **Run Processes** from the **File** menu and choose **Load Contract Price Estimates**. Submit the batch job by clicking SUBMIT in the Confirm Process Submission window. See "Submitting Batch Processes" in Chapter 3 for more information about submitting and printing batch processes.]

4.12 Generating a Proposal-level Bid-Based Prices

To obtain historically generated prices for proposal items, you must run the Generate Proposal Level Bid Based Prices process. This process will generate average or regression prices (if the historical data is available) for proposal items by quantity level and other criteria. Then, it will propagate the proposal item prices to the corresponding project item record. Item prices in the Proposal Item and Estimate Item tables are updated and reports are also generated.

The Bid-Based Prices report generates price estimates by using multiple regression prediction equations produced by Trns•port BAMS/DSS. Trns•port bases predictions on bid data contained in the Trns•port BAMS/DSS historical database and includes quantity, location and time period. Trns•port writes the generated prices to each item's record in the Proposal Item table then the Project Estimate Item table for every item that does not already have a price estimate associated with it. Appendix C includes sample output and explanations of weighted averages and regression analysis.

The system manager must have run the Trns•port BAMS/DSS PEMETH and COMBID models to generate the BIDHIST.CSV, or bid history, file. This file contains all the data and parameters you need to generate bid-based prices. This process will continue to use the bid histories from the last file loaded until a newer BIDHIST file is generated and loaded to the proper area.

Select the proposals for which you want to generate from the Proposals list window. You can select more than one proposal by holding down CTRL while you select proposals with the mouse. Choose **Generate Bid-Based Prices** from the Run Processes window. Trns•port displays the Generate Bid Based Prices window (see Figure 4-27).

Figure 4-27. Generate Bid Based Prices Window

You must enter the proposed letting date in yy/mm/dd format before you can run the

process. Because season is one of the pricing coefficients, the date you enter sets the time parameters for generating bid-based prices.

Click SUBMIT to run the process, PARAMETERS to change parameters, or CANCEL to cancel the process submission.

4.13 Adding Fiscal Completion Schedule Data to a Proposal

You can add fiscal year information to a proposal record and create a report called the Proposal Fiscal Completion Schedule, which shows what percentage of work should be completed in each fiscal year of the proposal. You can generate a Proposal Fiscal Completion Schedule for an individual proposal or an entire bid letting.

To add fiscal year information to a proposal, select the proposal in the Proposals list window and select **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Proposal tabbed folder window (see Figure 4-28).

Click the FY SCHEDULE tab.

Figure 4-28. FY Schedule Tab on the Proposal Tabbed Folder Window

The FY SCHEDULE tab contains a grid listing all the fiscal years currently associated with the proposal. The last row in the grid displays totals for the Percent Time Elapsed and the Percent Funding Allocated columns. You can add or change information in any field in the grid.

To add a new fiscal year record to the proposal, select **Add** from the right mouse button menu. Trns•port adds a blank row to the grid. Enter information for the fiscal year and the time and funding percentages directly into each field.

To delete a fiscal year record, select the row containing the record and choose **Delete** from the right mouse button menu. You can select more than one fiscal year by holding down CTRL while you select records with the mouse, or select all records by selecting **Select All** from the right mouse button menu.

Trns•port displays a Delete Warning window. Click YES in the window to complete the delete process.

When you have finished adding, changing or deleting fiscal year information from the proposal, save your changes to the database by selecting **Save** from the **File** menu. Trns•port displays a Warning message if either of the totals do not equal 100 when you attempt to save or close the tabbed folder window.

4.13.1 Generating the Proposal Fiscal Completion Schedule Report

To print the Proposal Fiscal Completion Schedule report, select the proposal from the Proposals list window and choose **Run Process** from the right mouse button menu. Trns•port displays the Processes window. Select **Generate Proposal Fiscal Completion Schedule Report** from the Processes window and click OK.

Trns•port displays the Confirm Process Submission window. Click SUBMIT to run the process.

4.14 Deleting a Proposal

You can delete a proposal and its associated references. There are two levels of delete at the proposal level. You can delete the following information:

Related addendum information

List of projects associated with the proposal

List of special provisions associated with the proposal

Any association between the proposal and a bid letting

Project estimate information for all projects belonging to the proposal (optional)

> ! Caution: Do not delete proposals that still have data in Trns•port LAS (for example, bid tab or planholder data); otherwise, the Trns•port LAS data for those proposals will not be accessible.

To delete a proposal record, select the proposal or proposals in the Proposals list window. Then choose **Delete** from the right mouse button menu. Trns•port displays a Delete window.

If you choose **Delete**, you will delete the association of a single proposal with the projects associated with the proposal. You will also delete the proposal header records, sections, addendums, proposal sites and long description. Click CANCEL to return to the Proposals list window without deleting. Click OK to continue the delete process. Trns•port displays a Delete Warning window.

Click YES in each of the windows to complete the delete process.

5.0 Setting up a Bid Letting and Assigning Proposals

When you finish creating a proposal and it is ready for contractors to bid on, you are ready to set up a bid letting. You must create a letting and assign proposals to the letting so the proposals will be available for bid. You can also specify the order in which your agency will open and read the proposal bids and you can add descriptive information about the letting such as letting date, time and location.

5.1 Adding a Bid Letting Record

Before you can assign proposals to a bid letting, you must set up a bid letting header record.

To select the bid letting function in Trns•port PES, click the BIDLETS button on the Trns•port PES button bar. Trns•port displays a Bid Letting list window (see Figure 5-1).
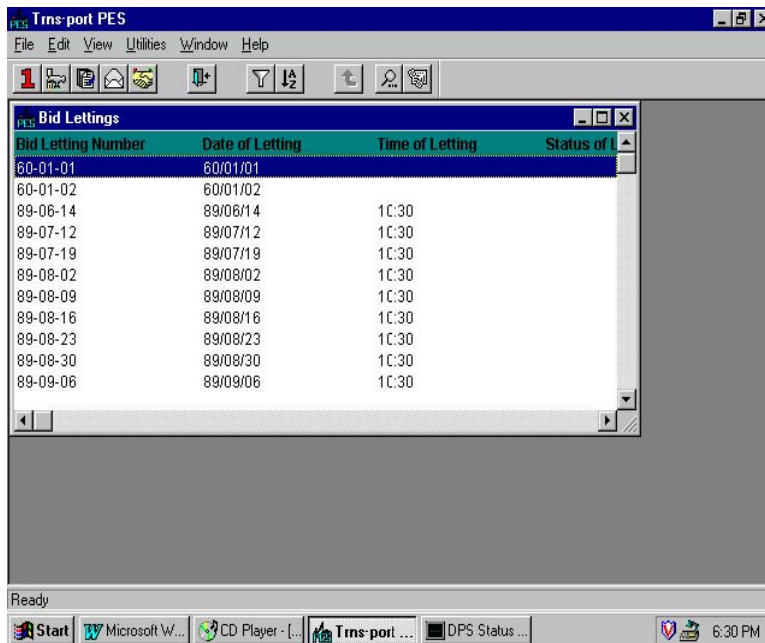
Figure 5-1. Bid Letting List Window

To create a new bid letting record, press INSERT or select **Add** from the right mouse menu to display the Add Bid Letting Package window (see Figure 5-2).
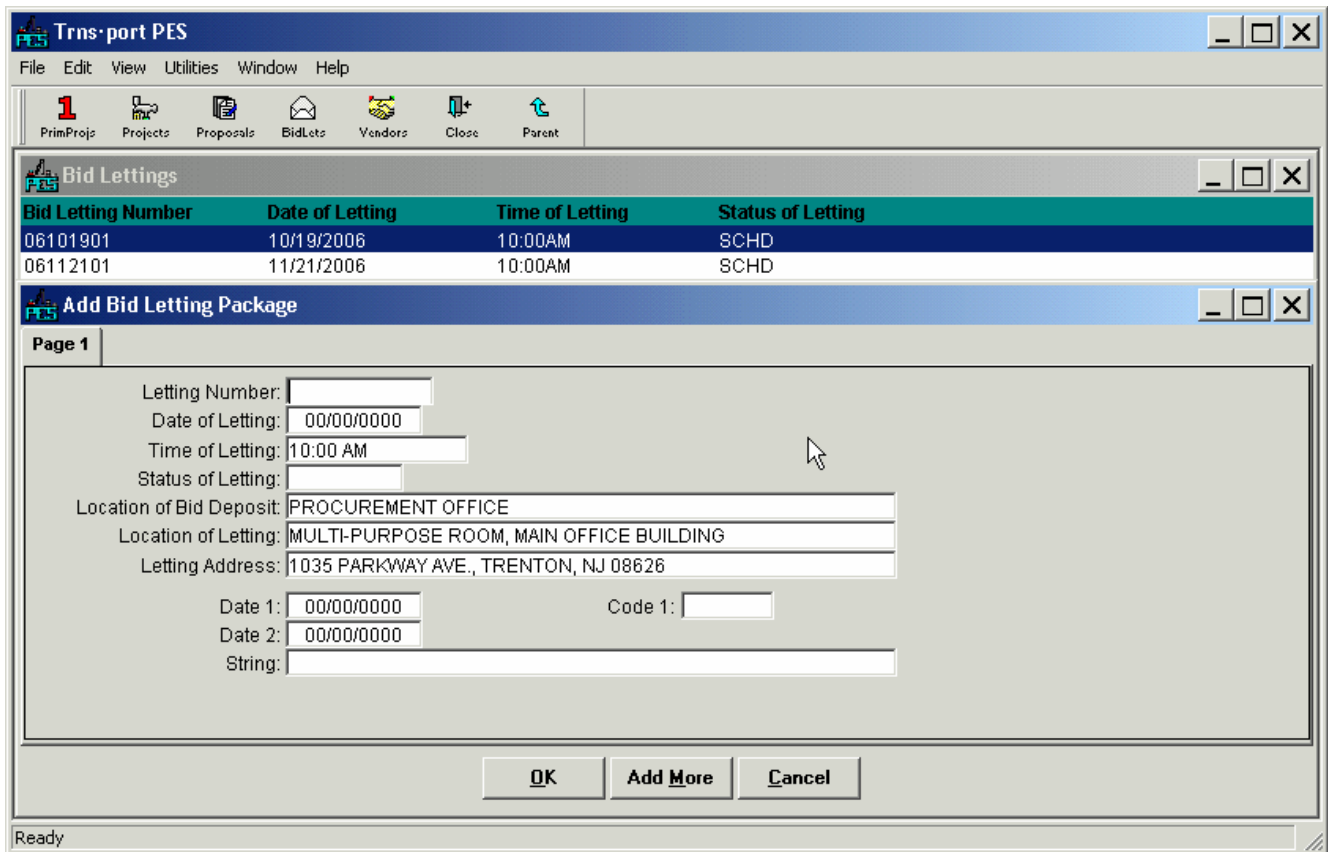
Figure 5-2. Add Bid Letting Package Window

To create a complete record you must enter information in these fields: **Date of Letting**
The date you will hold a letting. Enter in YY/MM/DD format. **Letting Number** A unique
identifying number or alphanumeric for a bid letting.

You are not required to, but you can enter information in these fields to record additional
information about a letting:

Letting Address   A description of the letting location.

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

**Location of
Letting**   The location at which you will perform a letting.

Status of Letting   A value, which must be selected from the attached
                           LETSTAT code table, which indicates the status of the
                           letting (for example, planned, scheduled, or
                           postponed).

Time of Letting   The time a letting will be held.

When you finish entering information, click OK to add the bid letting, ADD MORE to add
another bid letting, or CANCEL to return to the Bid Letting list window without adding a
letting.

Trns•port adds new lettings to the bid letting list by the number of the letting. You may
have to scroll up or down to find the lettings you added.

5.2 Changing a Bid Letting Record

To change information in a bid letting record, select the record in the Bid Lettings list window and choose **Change** from the right mouse button menu. Trns•port displays a Bid Letting Package window.

You can change or add information in any field except Letting Number. When you finish making changes, click OK to save your changes or CANCEL to return to the Bid Lettings list window without saving.

5.3 Assigning Proposals to a Bid Letting

To assign proposals to a new bid letting, select the bid letting in the Bid Letting list window and click the LETPROP button on the button bar or choose **Letting Proposal List** from the right mouse menu. Trns•port displays the Letting/Proposals list window (see Figure 5-3).
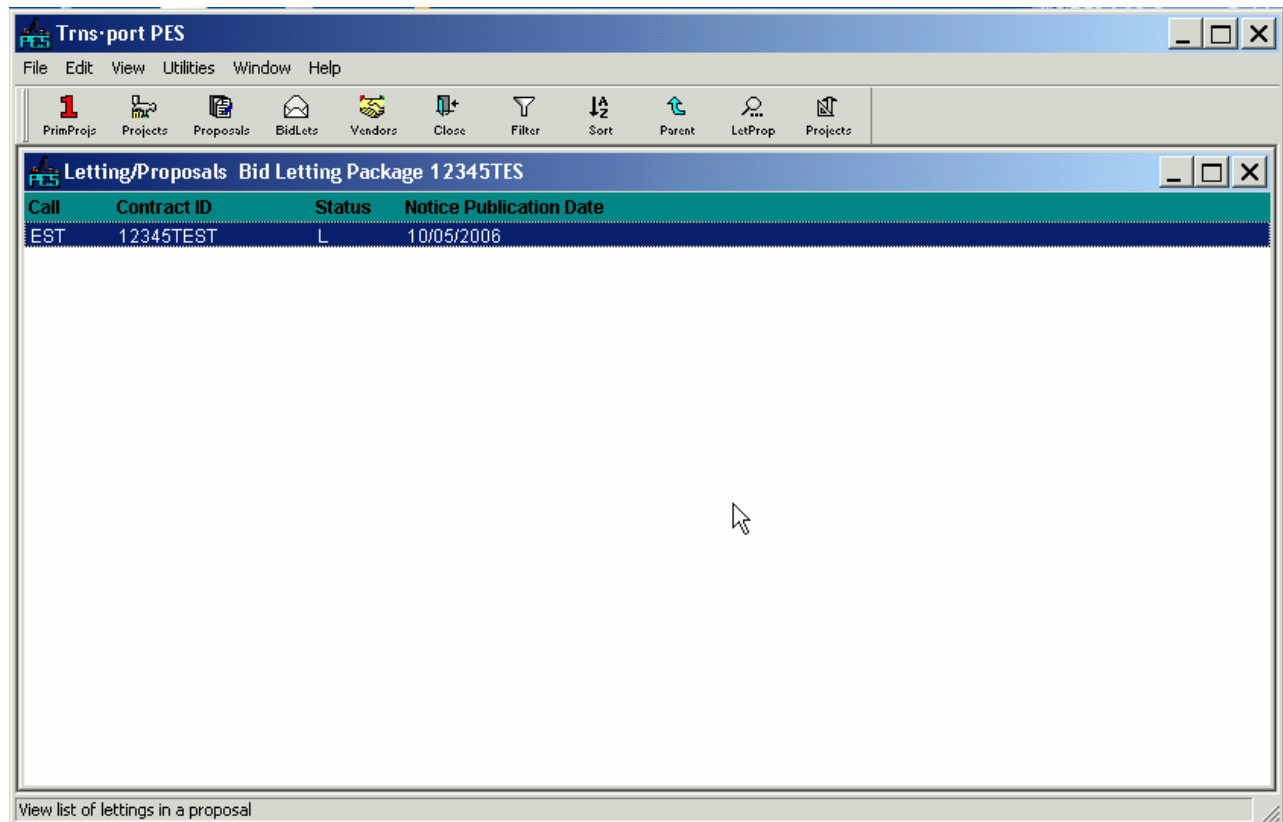
Figure 5-3. Letting Proposals List Window

To assign proposals to the letting, press INSERT or choose **Add** from the right mouse menu. Trns•port displays the Add Letting/Proposal window (see Figure 5-4).
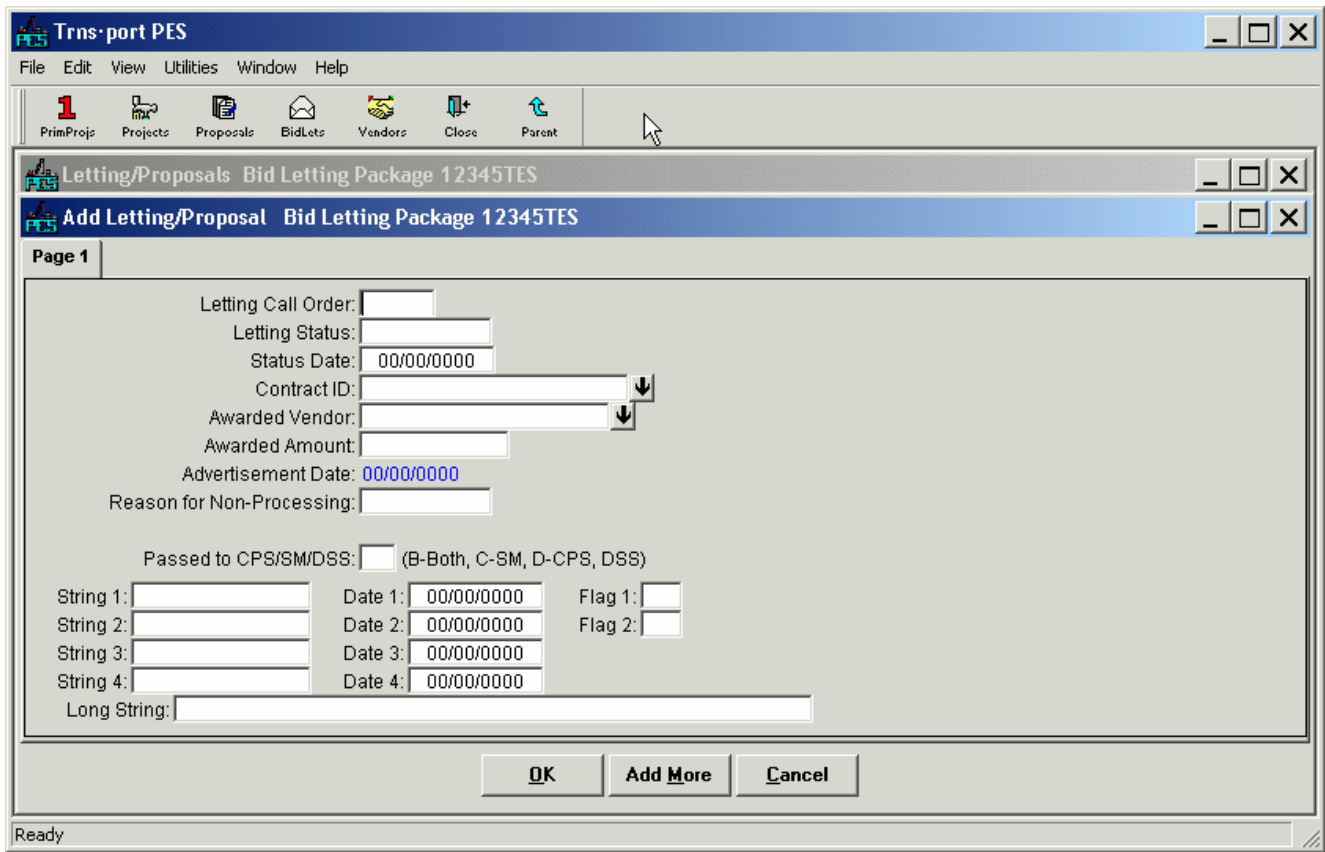
Figure 5-4. Add Letting/Proposal Window

Contract ID	A unique identifier for a proposal or contract.
Letting Call Order	The order in which you will open a bid for a specified proposal during a bid letting.
Advertisement Date	The date you will notify potential bidders of the letting of a proposal. Enter in YY/MM/DD format

You are not required to, but you can enter information in these fields to record additional information about a letting:

Awarded Amount	The dollar amount awarded to the winning bidder for a proposal.
Awarded Vendor	The vendor number of the winning bidder for a contract.
CAS Contract ID	A unique identifier for the contract when it is passed to a construction system. This allows the state to rename a proposal once it has been awarded.
Letting Status	A value, which must be selected from the PRPSTAT code table, which indicates the status of a proposal.
Passed to SiteManager (CAS)/DSS	Indicates whether a contract has been passed to DSS (D), CAS (C), or both (B). This field is blank if the contract has not been passed. If you plan to pass a contract that has been passed previously, you must make sure this field is blank before you pass the contract again.

Reason for Non-Processing	A value, which must be selected from the attached CNAWDRS code table, which indicates the reason the proposal is not processed.
Status Date	The date you entered the status.

Click OK to add the proposal letting information to the Trns•port database, ADD MORE to add another proposal to the letting, or CANCEL to exit without saving.

Trns•port displays the proposals you assigned to the letting in the Letting/Proposals list window in call order.

To close the Letting/Proposals window, click the CLOSE button on the button bar.

5.4 Initializing a Proposal

When a proposal has been assigned to a bid letting, you must first initialize the proposal before you can begin to manage the Letting in LAS.

Open the bid letting list window, right click and select Letting Proposal List. Right click the proposal and select Run Process. Select Initialize Letting Proposals, ok, submit, and ok. Once the proposal has been initialized the text file can be generated.

5.5 Changing Letting/Proposal Information

To change information about a letting/proposal, select the letting/proposal in the Letting/Proposals list window and choose **Change** from the right mouse button menu. Trns•port displays a Letting/Proposal window.

You can change or add information in any field except Letting Call Order. When you finish making changes, click OK to save your changes or CANCEL to return to the Letting/Proposals list window without saving.

5.6 Listing Bid Letting Packages

You can produce a hard copy listing of bid letting information to help you review current data values. To select the bid lettings to list in the report, hold down CTRL while you select bid lettings with the mouse. Then select **Run Process** from the right mouse button menu. Trns•port displays a Processes window.

Select **List Bid Letting Packages** and click OK to run a process. Trns•port displays a Confirm Process Submission window.

Click SUBMIT to run the process, PARAMETERS to change process submission parameters, or CANCEL to return to the Bid Lettings list window without running the process.

5.7 Generating a Proposal Schedule Report

After you assign a proposal to a letting, the proposal schedule will have letting data available. You can then run the Proposal Schedule report, which consists of these sections:

- Proposal Cover Sheet – The cover sheet shows proposal information and projects associated with the proposal. The second page of the cover sheet lists the proposal sites, estimated number of days to complete the contract, and the liquidated damages per day rate. If the proposal has alternate items, they are also listed. The Road User Cost per day section is printed for proposals that involve Cost Plus Time bidding.

- Proposal Schedule of Prices – The schedule of items is printed for distribution to all

potential bidders. The schedule shows each proposal line item, its description and estimated quantity. Space is provided for the contractor to enter the bid price, the extended bid amount, section totals, cost plus time number of days bid and proposal total.

- Proposal Estimate – The Proposal Estimate with the Engineers Estimate is similar to the schedule of items but is for IN HOUSE USE ONLY. IT IS IMPORTANT THAT THIS IS NOT POSTED.

- Special Provisions Listing – The special provisions listing lists all special provisions associated with the proposal.

- Special Provisions Text – The special provision text for each special provision attached to the proposal can be printed.

- DBE Interest Report – The DBE Interest Report lists proposal items that have been flagged in the item file as likely items for DBE/WBE (ESBE for NJDOT) subcontracts. Information on this report can be used to help determine and evaluate ESBE goals for a proposal.

- Generate Pass File to EBS – Once the proposal item details are finalized they can be transferred from PES to Expedite in an EBS file.

- Quantity Sheet Summary – A summary sheet of all item quantities and the total estimate amount.

To run a Proposal Schedule report, select a proposal from the Proposals list window and choose Run Process from the File menu to display a Processes window.

Select Generate Proposal Schedule and click OK. Trns•port displays the Proposal Price Schedule Options window (see Figure 5-5).
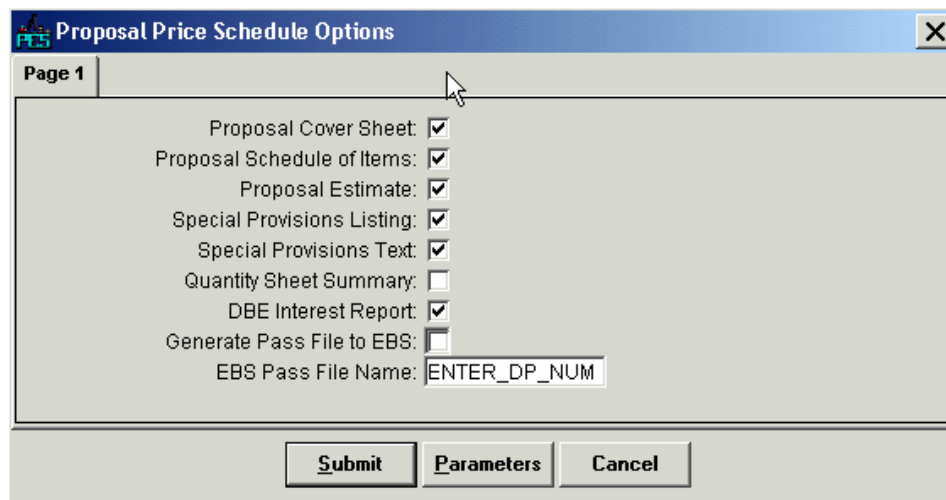
Figure 5-5. Proposal Price Schedule Options Window

You must fill in the EBS Pass File Name, which is the DP#, before you can run the process. You can generate any combination of the report sections by clicking each check box.   Make sure the proposal estimate is NOT checked because the Engineers Estimate is included and it SHALL NOT BE POSTED.

Click OK in the Proposal Price Schedule Options window to run the process. Click OK in the Job Monitor window to return to the Proposals list window

5.8 Deleting a Bid Letting Package

You can delete an existing bid letting package at three levels. Each level of delete eliminates more data from the Trns•port database. The first level deletes all bid letting, the second level includes proposal-level information, and the third level also deletes all project-related information.

> **!** Caution: Do not delete a bid letting package if the letting has data in Trns•port LAS (for example, bid tab data). Trns•port performs a check to ensure this never happens.

To delete a bid letting package, select the bid letting in the Bid Lettings list window. Then choose **Run Process** from the right mouse button menu. Trns•port displays a Processes window.

Select **Delete Bid Letting Package** and click OK. Trns•port displays a Delete dialog box.

The type of deletes Trns•port displays depend on which deletes you have the security to perform. If you choose **Delete**, you will delete the bid letting package and associated letting proposals for all calls in the selected letting. Click OK to continue the Delete process or click CANCEL to return to the Bid Lettings list window without deleting. If you click OK, Trns•port displays a Delete Warning window.

If you click YES, Trns•port will complete the delete process. If you click NO, Trns•port will return to the Bid Lettings list window without deleting.

If you choose **Power Delete**, you will also delete all proposal-level information for the proposals in the selected letting (that is, the sites, long description, proposal provisions and sections). Trns•port displays a series of two Delete Warning windows.

If you choose **Strong Delete**, you will also delete all projects, category, funding, and item information for the projects assigned to the proposals for the selected letting. Trns•port displays a series of three Delete Warning windows.

6.0 Managing Addendums

After you advertise a proposal, you will have to make changes to the proposal with addendums. You can add new items, change existing items, or delete items. The items can be in the same or different categories.

To add an addendum to a proposal, you must create an addendum header record and then specify the project and category for each proposal addendum item.

> 📄 Note: If you make changes in Trns•port PES (where you manage the addendums) to proposals that you have already initialized in Trns•port LAS (where you do the advertising), you will need to reinitialize the proposals in Trns•port LAS to transfer addendum changes from Trns•port PES. This means you must run the batch process Initialize Letting Proposals.

6.1 Creating an Addendum Header Record

To begin creating an addendum, you must create an addendum header record.

Select the proposal to which you want to add an addendum from the Proposal list window and click the ADDEND button or choose **Addendum List** from the right mouse menu to display the Addendums list window (see Figure 6-1).
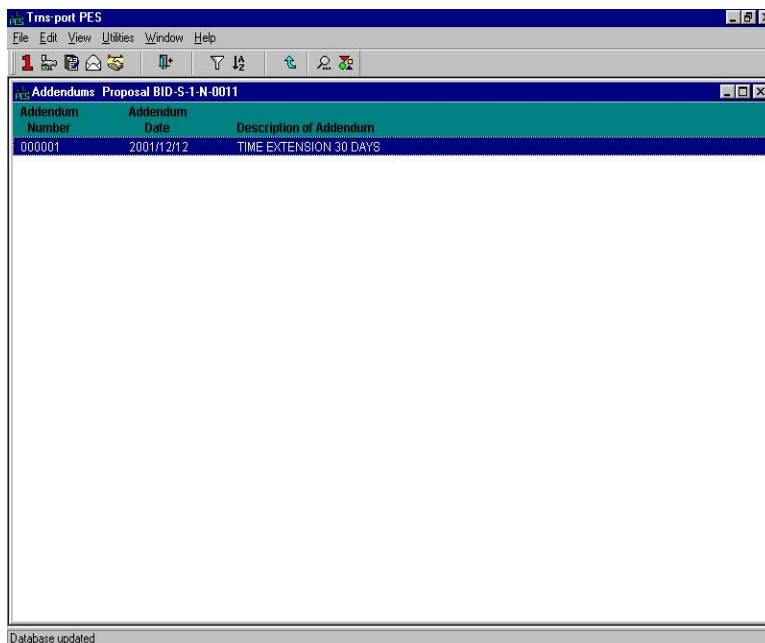
Figure 6-1. Addendum List Window

Press INSERT or choose **Add** from the right mouse menu to display the Add Addendum detail window (see Figure 6-2).
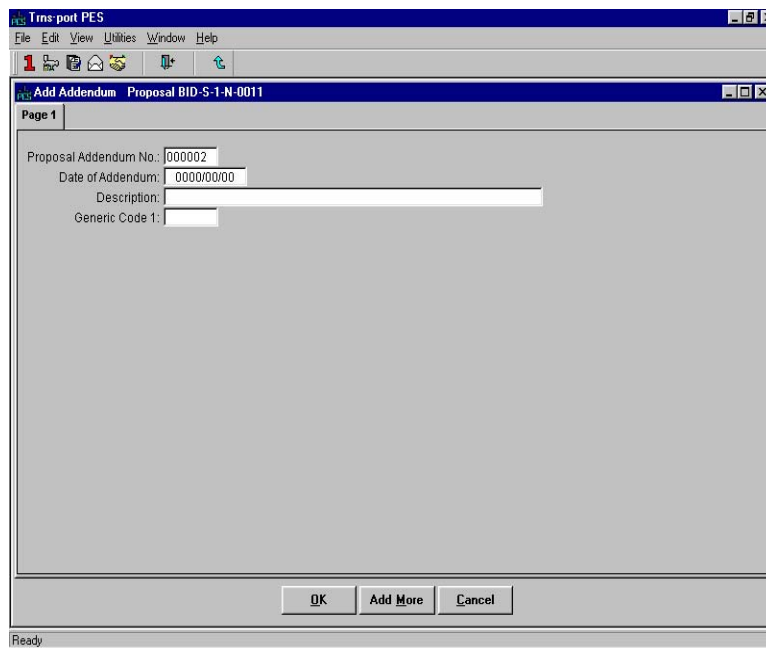
Figure 6-2. Add Addendum Detail Window

To create a complete record you must enter information in these fields:

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

Description A short description of the addendum.

Proposal A sequential number identifying a proposal addendum. Trns•port

Addendum No. Enters a value automatically.

When you finish adding information about this addendum, click OK to save the record, ADD MORE if you want to add another addendum, or CANCEL to return to the Addendums list window without adding an addendum.

6.2 Changing or Deleting Addendums

You can change addendum information by selecting the addendum from the Addendum list window and choosing **Change** from the right mouse button menu. Trns•port displays an Addendum window.

Trns•port enters any available information about the addendum. You can add or change information in any field except Proposal Addendum Number. When you finish making changes, click OK to save your changes or click CANCEL to return to the Addendums list window without saving changes.

To delete an addendum record, choose the addendum in the Addendums list window and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES in each window to complete the delete process.

6.3 Maintaining Addendum Item Information

Trns•port treats each addendum item record as a transaction to apply to the original project specifications. Because Trns•port includes addendum items in Trns•port LAS reports, you must specify the project, category, item number, and items alternate code

(if any) for each proposal addendum item. You must also specify the proposal section number and proposal line item number.

The PES Addendum Item table will now contain an audit trail of item level changes, additions, and deletions, while the PES Estimate Item table will always contain the current state of project estimate level items with addendum item changes automatically applied.

To maintain addendum item information, select the addendum for which you want to maintain item information and select **Addendum Items** from the right mouse button menu. Trns•port displays the Addendum Items List Window (see Figure 6-3).

> 📄 **Note:** Only the addendum items on the most recent addendum may be changed or deleted, and addendum items may only be added to the most recent addendum. Only the most recent addendum may be changed or deleted as a whole.
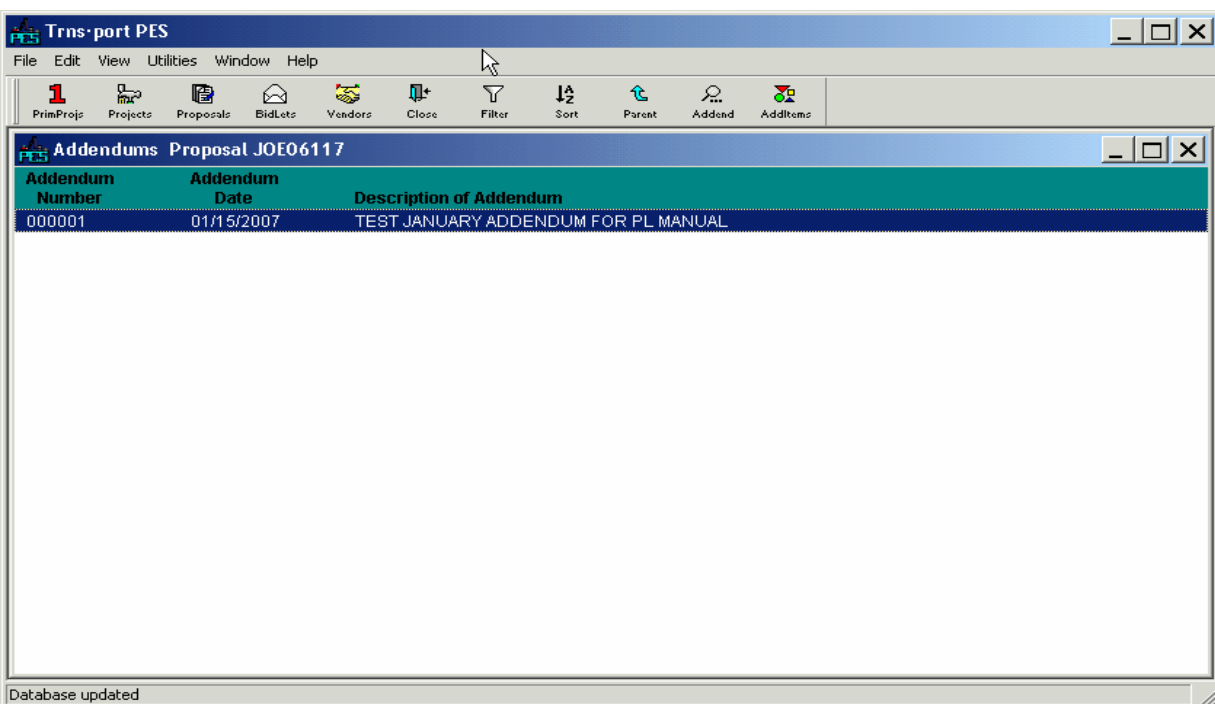
Figure 6-3. Addendum Items List Window

6.3.1 Adding an Addendum Item Record

Depending on the purpose of your addendum item, you will add an addendum item record in one of these three ways:

- To add an addendum item record to add a new item, select **Add** from the right mouse menu and then choose **New Item** to display the Add Addendum Item detail window.

- To add an addendum item to modify an item, select **Add** from the right mouse menu and then choose **Modify Item** to display the Add Addendum Item detail window.

- To add an addendum item to delete an item, select **Add** from the right mouse menu and then choose **Delete Item.**

Transport displays an Add Addendum Item detail window (see Figure 6-4).
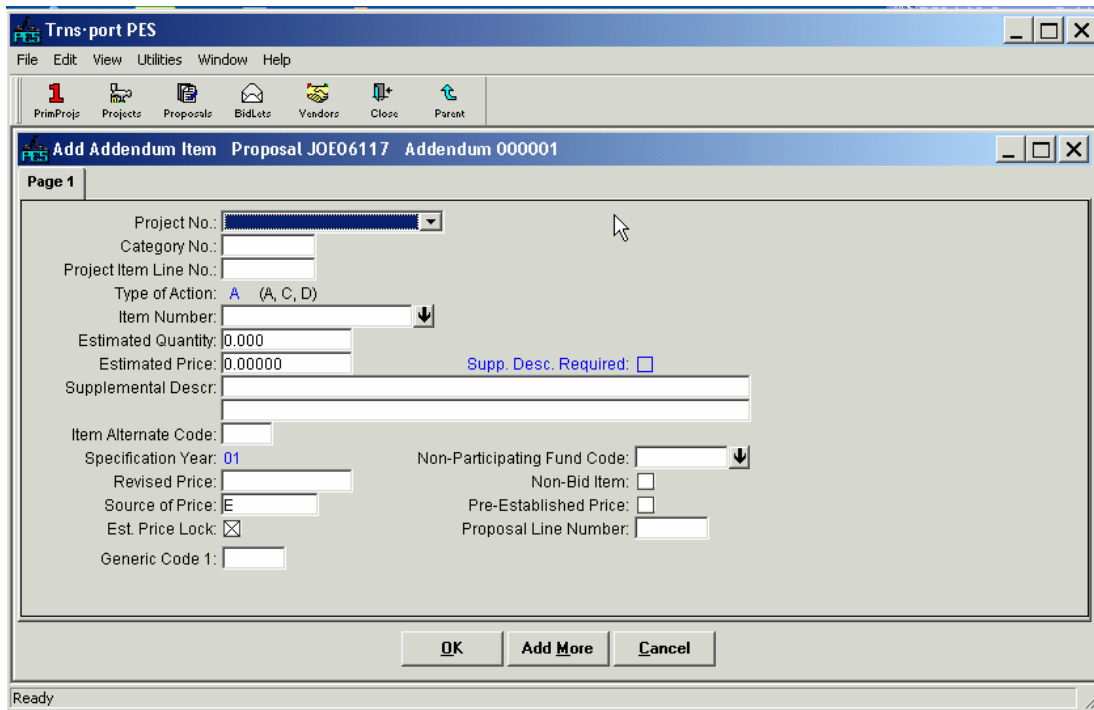
Figure 6-4. Add Addendum Item Detail Window

To create a complete record you must enter information in these fields:

Category No.   A unique identifier for a project category. Choose a value from the attached drop-down list. When you add an addendum item, Trns•port fills the Category Number drop-down list with all categories in the project. If you select a different category number, Trns•port reverts the other fields to the default values until you select a Project Item Line Number.

Estimated Price   The engineer's estimated cost for one unit of an item. Trns•port uses this field to determine an item's cost for the Detailed Estimate. Defaults to 0.00000; enter only if you are adding an item because Trns•port will use the original price if you change an existing item quantity.

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

Item Number   A unique identifying number or alphanumeric assigned to each item. Choose a value from the attached drop-down list.

   📄 Note: To save time when adding items to a project, you can create a default filter for the Item List lookup window that will automatically filter the list to show only those items that you typically work with.

   After you add an addendum item to a proposal you MUST sign on to Trns•port LAS and reinitialize the proposal before you can continue to work with the proposal in LAS.

Project Item Line No.   A unique sequential identifier for an item within a project. Choose a value from the attached drop-down list. When you select a category number, Trns•port fills in the Project Item Line No. list with all project item line numbers for the selected project and category. When you select the Project Item Line No., Trns•port fills in the Item Number, Item Description, Units or Lump Sum Units, Estimated Quantity, Estimated Price, Combine with Like Items, and Proposal Line Number fields.

Proposal Line Number   A unique sequential number that identifies a line item within a proposal. Trns•port automatically enters a value.

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

> ! **Caution**: Project Number, Category Number, Project Item Sequence Number and Proposal Line Number must match the item's fields exactly if you are changing or deleting an existing item. If you are not changing an existing item, be sure you enter a valid category number for the project and that you do not enter a project item sequence number or proposal line number that has already been used; otherwise, batch failures will result. Trns•port does not interactively check to determine if the item is valid.

You are not required to, but you can enter information in these fields to record additional information about an addendum:

Item Alternate   Different items can serve as alternates for each other, which means that

Code   a bidder can choose to bid on either item, but not both. The first two characters of the item alternate code specify the alternate set and the third character indicates the choice within the set.

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

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

Pre-Established Price   Indicates that the item has a fixed price.

Revised Price   You can change the Estimated Price by filling in a new value in this field. Trns•port will use the Revised Price instead of the Estimated Price whenever this field is non-blank, which allows you to keep a record of the changes you have made to any of the estimated prices.

Source of Price   A value, which must be selected from the attached PRICSPR code table, which indicates the originating source of an estimated price for an item (for example, estimated or historical).

When you finish entering information, click OK to add the item to the selected addendum. Click ADD MORE if you want to add another item or click CANCEL to return to the Addendum Items list window without adding an item.

6.3.2 Changing an Addendum Item Record

To change an addendum item record, select the item record in the Addendums Items List window and choose **Change** from the right mouse menu. Transport displays an Addendum Item detail window with all information associated with the addendum item record (see Figure 6-5).

Figure 6-5. Add Addendum Item Detail Window

You can enter or change information in any field except Project No., Category No., Project Item Line No., and Specification Year. When you finish making changes, click OK to save your changes or click CANCEL to return to the Addendum Items List window without saving.

To delete an addendum item record, select the item in the Addendums Items List window and choose Change from the right mouse menu. Transport displays a Delete Warning window. Click YES in each window to complete the delete process.

6.4 Listing Proposal Addendums

To produce a hard copy listing of proposal addendum information, select the proposal or proposals for which you want to list addendums from the Proposals list window. (You can select more than one proposal by holding down CTRL while you select proposals.)

To generate the report, select **Run Process** from the **File** menu to display the Processes window. Choose **List Proposal Addendum** from the report list and click OK to run the process. Trns•port displays a Confirm Process Submission window.

Click SUBMIT to run the process, PARAMETERS to change process submission parameters, or CANCEL to return to the Proposals list window without running a process.

> ! **Caution:** After you review the report output, sign on to Trns•port LAS and reinitialize each proposal to which you added addendums.

7.0 Introduction to Trns•port LAS

This chapter provides an overview of the Trns•port system and describes the workflow of the Trns•port LAS (Letting and Award System) module.

7.1 Trns•port LAS Overview and Work Flow

Trns•port LAS automates activities associated with letting and awarding projects. You can enter information about vendors who receive proposals into the system for proposal cost accounting, mailing list generation and addendum distribution. After the bid opening, you can enter bids interactively or through a batch facility. Trns•port performs edit checks of each bid and a bid editing facility allows you to correct errors. When you enter all bids and finish editing, you can generate the following reports to help you evaluate and award bids:

- Bid Tabulations (including the Engineer's Estimate, if desired)
- Low Bid Summary

After you award contracts, you can produce pre- and post-letting bid letting summary reports, final detail estimates (project agreements), and final contract price schedules.

After you award a contract, you can archive bid information from Trns•port LAS (for example, engineer's estimate information, bids from all bidders and the winning bidder) to the historical Trns•port database Trns•port Decision Support System (Trns•port BAMS/DSS). You can initialize a contract by passing winning bidder information and estimated item quantities to Trns•port Construction Administration System (SiteManager Construction)

The Trns•port LAS work flow includes these steps:

Initialize the bid letting proposals.

After you define a bid letting in Trns•port PES, you must initialize the proposals for the bid letting in Trns•port LAS. You must rerun the initialization process if you make changes to estimate information for the proposals or add addendums in Trns•port PES. You can run and rerun the process any time.

Process: Initialize Letting Proposals (File|Run Process)
Location: Bid Lettings List Window (Parent)
                     Letting/Proposals List Window (Child)

Notify the contractors about bid letting details.

The Notice to Contractors report notifies contractors about bid letting details. This report specifies the proposals that are up for bid in the letting and the work items that comprise those proposals.

Process: Generate Notice to Contractors (File|Run Process)
Location: Bid Lettings List Window (Parent)
                     Letting/Proposals List Window (Child)

Enter purchase information for proposals and plans.
As contractors purchase proposal books and plans for the proposals in the bid letting, you record the purchases. You can use this information to distribute proposal addendum information, invoice plan purchases, and identify bidders who have purchased valid-for-bidding proposals as well as courtesy or "nonbid" planholders.

Trns•port must have entries for each bidder in the planholder list indicating the bidder purchased a valid-for-bidding proposal book for each proposal for which they submitted a bid.

Trns•port maintains a master reference list of vendor information. You must enter planholder ship-to and bill-to addresses in the Vendor file. You might have to periodically maintain the Vendor file as vendor information changes.

Process: Add/Change/Delete Planholder

Location: Vendors List Window (Parent)
　　　　　　　　　Bid Lettings List Window (Child)
　　　　　　　　　Planholders List Window (Child)

Process: Add/Change/Delete Vendor
Location: Vendors List Window

Generate Planholder Reports.

When you distribute addendums to the proposals in a letting, you can run mailing labels (single label or three-across label sets) for each planholder on the letting planholder list for addendum and plan distribution. You can select options for ship-to or bill-to address labels and to print a list of planholders. Later you can rerun this report to print a list of planholders and a vendor invoice report that is based on the cost of plans purchased (see below).

Process: Generate Planholder Reports (File|Run Process)
Location: Bid Lettings List Window (Parent)
　　　　　　　　　Letting/Proposals List Window (Child)

Hold the bid letting.
Receive bids for the proposals in the letting.

Import bid information.
After you receive the bids for the letting, you can load the bid information into Trns•port LAS. Bid information consists of an entry in the Bidders file for each proposal bidder and an entry in the Bid Tabs file for each proposal item bid, proposal section bid total, proposal bid total, and in the case of Cost Plus Time bids, the number of days bid. You can import bid information through a batch process for external files or enter it interactively.

Batch
Process: Load Bid Tabs (File|Import)

Interactive
Process: Add Bidders
Location: Bid Lettings List Window (Parent)
　　　　　　　　　Letting/Proposals List Window (Child)
　　　　　　　　　Bidders List Window (Child)

Process: Add/Change/Delete Bid Tabs
Location: Bid Lettings List Window (Parent)
　　　　　　　　　Letting/Proposals List Window (Child)
　　　　　　　　　Bidders List Window (Child)
　　　　　　　　　Bid Tabs List Window (Child)

Process: Add/Change/Delete Bid Time
Location: Bid Lettings List Window (Parent)
                    Letting/Proposals List Window (Child)

Process: Add/Change/Delete Number of Days Bid
Location: Bid Lettings List Window (Parent)
                    Letting/Proposals List Window (Child)

Check bid information.

You can use the Bid Tab Edit report to perform edit checks on the consistency and validity of bid information. ***Whenever you modify bid information through the interactive or batch facilities, you must run the Bid Tab Edit report. You must generate the report before you generate the Bid Tab Analysis report.***

Process: Generate Bid Tab Edit Report (File|Run Process)
Location: Bid Lettings List Window (Parent)
                    Letting/Proposal List Window (Child)

Correct bid information errors and rerun the Bid Tab Edit report.
Correct errors detected by the Bid Tab Edit report or that you detect. You can make corrections interactively or through the batch facility for an external file. After you make corrections, rerun the Bid Tab Edit report to verify the corrections.

Batch
Process: Load Bid Tabs (File|Import)

Interactive
Process: Add/Change/Delete Bidders
Location: Bid Lettings List Window (Parent)
                    Letting/Proposals List Window (Child)
                    Bidders List Window (Child)

Process: Add/Change/Delete Bid Tabs
Location: Bid Lettings List Window (Parent)
                    Letting/Proposals List Window (Child)
                    Bidders List Window (Child)
                    Bid Tabs List Window (Child)

Process: Add/Change/Delete Bid Time
Location: Bid Lettings List Window (Parent)
                    Letting/Proposals List Window (Child)

Process: Add/Change/Delete Number of Days Bid
Location: Bid Lettings List Window (Parent)
                    Letting/Proposal List Window (Child)

Process: Generate Bid Tab Edit Report (File|Run Process)
Location: Bid Lettings List Window (Parent)
                Letting/Proposal List Window (Child)

Generate Bid Tab Analysis reports.
The Bid Tab Analysis process includes the Low Bid Summary, the Tabulation of Bids, and Low Bid Item Analysis reports. These reports provide hard copy comparisons between

the valid estimates and the bids. After you modify and successfully process bid information through the Bid Tab Edit report, you must run the Generate Bid Tab Analysis process.

Process: Generate Bid Tab Analysis (File|Run Process)
Location: Bid Lettings List Window (Parent)
             Letting/Proposals List Window (Child)

Generate Bid Letting Summary reports.
The Bid Letting Summary reports summarize bid letting addendums, bid letting history, and the Bid Letting Comparison form. You can run and rerun these reports any time before, during, or after the letting.

Process: Generate Bid Letting Summary (File|Run Process)
Location: Bid Lettings List Window (Parent)
             Letting/Proposals List Window (Child)

Set proposal award status.
When you determine the award decisions for the letting, you must set the award status (awarded or rejected) for each proposal in the letting.

Process: Change Letting Proposals
Location: Bid Lettings List Window (Parent)
             Letting/Proposals List Window (Child)

Enter the DBE/WBE (ESBE)commitments for awarded contracts and generate a listing of DBE/WBE commitments.

You can enter the DBE commitments for the awarded contracts.
Process: Add/Change DBE/WBE Commitments
Location: Bid Lettings List Window (Parent)
             Letting/Proposals List Window (Child)
             DBE Commitments List Window (Child)

Then you can print a listing of DBE/WBE commitments.

Process: List DBE/WBE Commitments (File|Run Process)
Location: Bid Lettings List Window (Parent)
             Letting/Proposals List Window (Child)

Generate Contract Schedules for the awarded contracts.
You can generate a Contract Schedule of Prices and a DBE Interest report for each awarded contract. The Contract Schedule of Prices report is similar to the Proposal Schedule with the winning bidder's unit prices.

Process: Generate Contract Schedule (File|Run Process)
Location: Bid Lettings List Window (Parent)
             Letting/Proposals List Window (Child)

Generate Final Detail Estimate reports for awarded projects.
You can generate a Final Detail Estimate report for each of the projects, proposals or bid lettings. If these proposals have been awarded, the winning bidder's unit prices will be used.

Process: Generate Final Detail Estimate (File|Run Process)
Location: Bid Lettings List Window (Parent)
             Letting/Proposals List Window (Child)

Pass the bid letting information to Trns•port BAMS/DSS.
Trns•port LAS passes the bid letting information to the Trns•port BAMS/DSS historical database.
Process: Pass Contract Data to DSS (File|Run Process)
Location: From anywhere in Trns•port LAS

Pass the awarded contract information to Trns•port SiteManager.
Trns•port LAS passes the contract and reference information in a form readable to the Trns•port SiteManager database.
Process: Pass Contract Data to SiteManager
Location: From anywhere in Trns•port LAS

8.0 Managing a Bid Letting

After you set up a bid letting header record in Trns•port PES, you can manage the bid letting function in Trns•port LAS.

8.1 Initializing Proposals

When you initialize a proposal, Trns•port generates a table that contains proposal-level items. Up to this point, all quantity data is at the project level. If you make changes to breakdown or project-level items after you initialize the proposal, you will have to reinitialize the proposal to incorporate the changes you made.

Before initializing a proposal, you should have already performed these tasks in Trns•port PES:

- Added projects to the proposal.

- Added a 00 proposal site and at least one county to the proposal record. If this information has not been added, Trns•port will display either an error or a warning message depending on the associated installation option setting.

- Added the proposal to a bid letting.

- Run the Generate Section/Line Numbers process.

  - 🗎 **Note**: If you go back to Trns•port PES and make changes to the associated proposal, projects, or estimates after you initialized them in Trns•port LAS, you must run the initialization function in Trns•port LAS again.

To initialize a proposal, you must first sign on to Trns•port LAS and select a bid letting.

8.1.1 Selecting a Bid Letting

To select a bid letting, click the BIDLETS button on the Trns•port LAS button bar. Trns•port displays a Bid Lettings list window (see Figure 8-1).
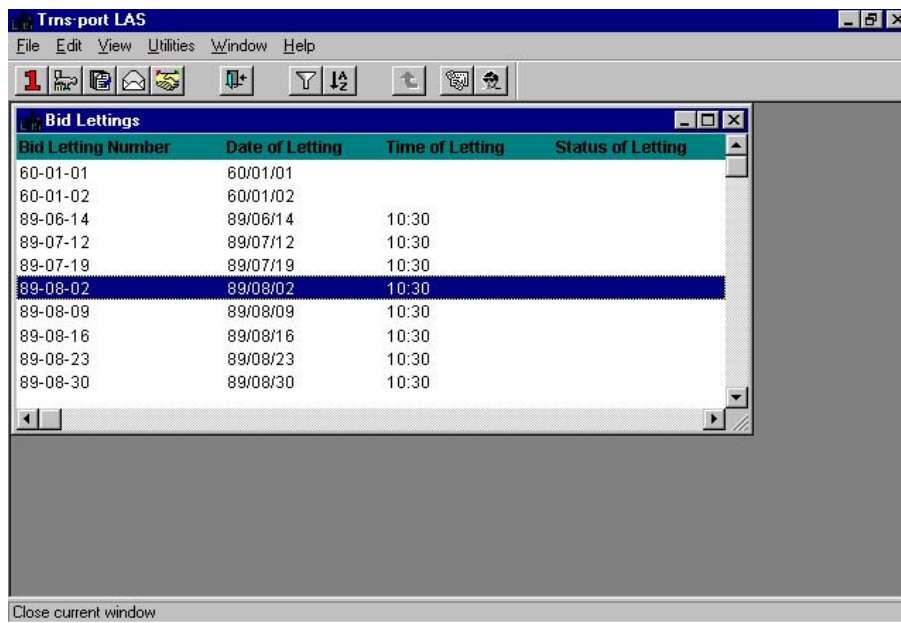
Figure 8-1. Bid Lettings List Window

8.1.2 Selecting Proposals

Click the LETPROP button to display a list of all proposals associated with the selected bid letting (see Figure 8-2).
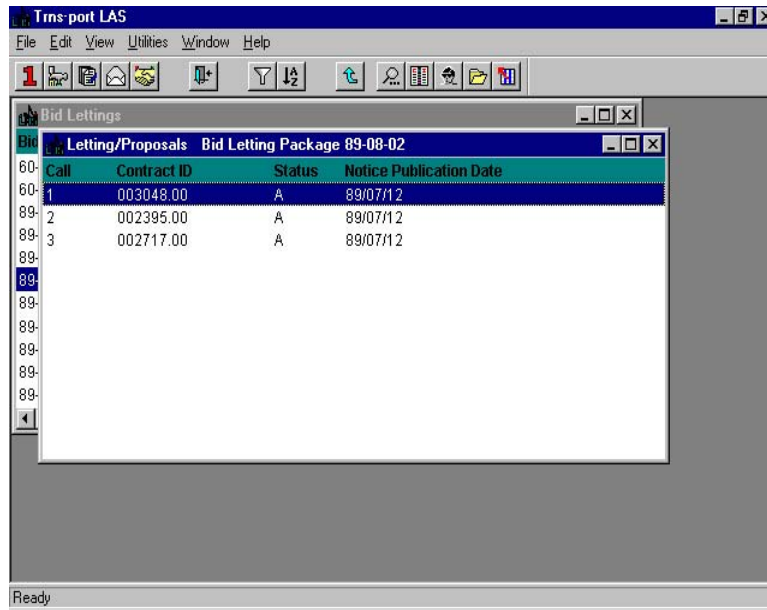
Figure 8-2. Letting/Proposals List window

Select the proposal you want to initialize by clicking on it. If you want to select more than one proposal, press and hold CTRL while you select proposals with the mouse.

8.1.3 Initializing Letting Proposals

To initialize letting proposals, select **Run Process** from the **File** menu to display the Processes window. Scroll down until you find **Initialize Letting Proposals** and select it. Click OK to display the Confirm Process Submission window.

Click SUBMIT to run the process.

The Initialize Letting Proposals function allows you to initialize only the proposal(s) for the bid letting you selected.

Trns•port updates LAS information in the Trns•port database from information you added in Trns•port PES. **You cannot go on to the next step until Trns•port completes its work.** The Initialize Letting Proposals function reports information to the message log regarding the status of the Letting Proposals it attempted to initialize.

When the process finishes, Trns•port sends a Job Completed message window to the computer from which you ran the process.

> 🔖   **Note**: If you initialize a proposal in Trns•port LAS and then add addendum items (which you must do in Trns•port PES), you must **reinitialize** the proposal in Trns•port LAS to transfer the Trns•port PES changes.

8.2 Adding and Changing Letting/Proposals

You add proposals to lettings in Trns•port PES, and then initialize those proposals in Trns•port LAS. You can also add additional proposals to a letting or change information about a letting/proposal in LAS.

8.2.1 Adding Letting/Proposals

To add a proposal to a letting, click the BID LETTING button to display the Bid Lettings list window. Select the bid letting to which you want to add a proposal and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Bid Letting tabbed folder window.

Click the LETTING PROPOSALS tab. The top part of the LETTING PROPOSALS tab contains a list of all the proposals associated with the letting. The bottom part of the LETTING PROPOSALS tab contains detail information for the proposal currently selected in the list (see Figure 8-3).
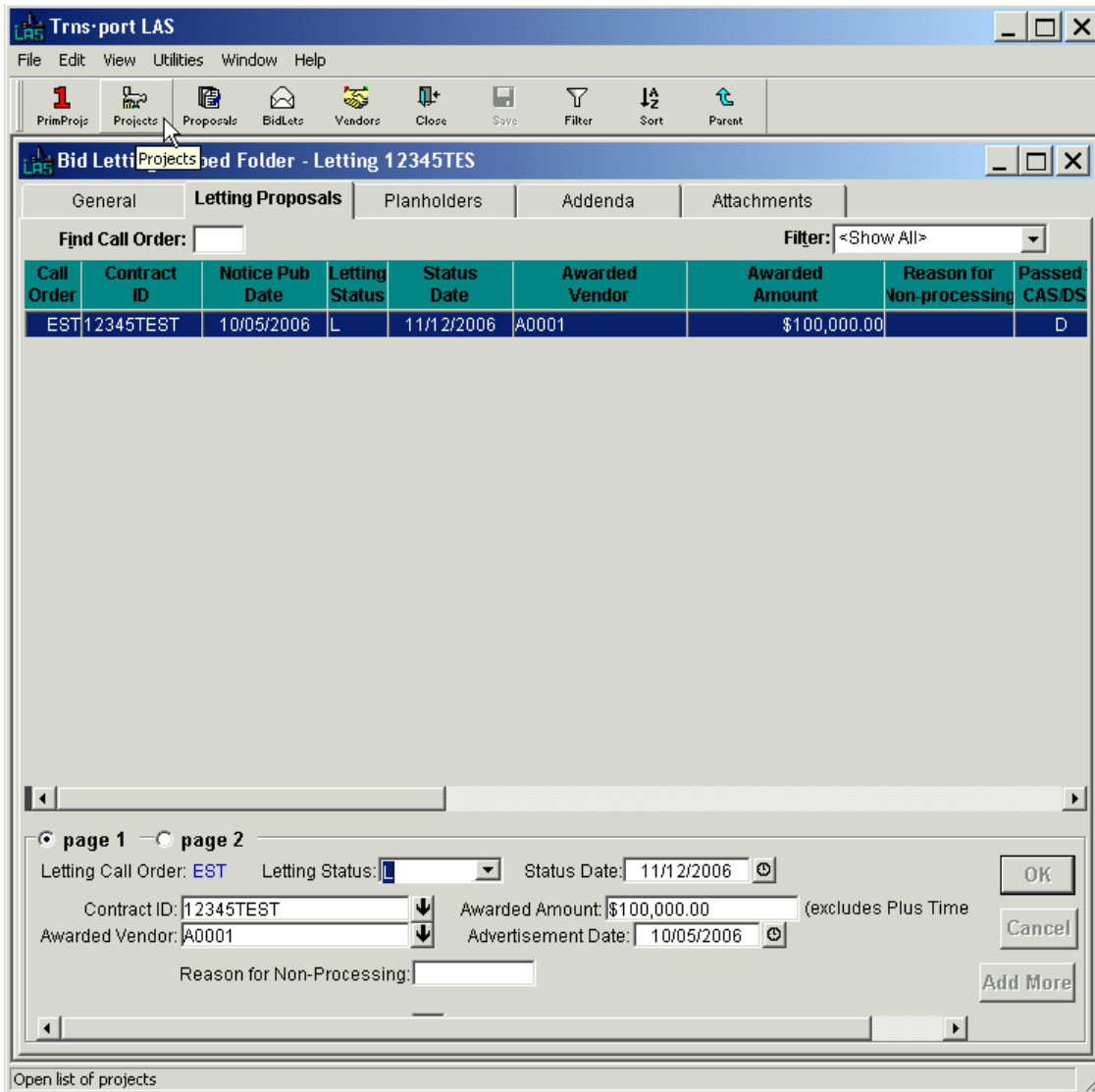
Figure 8-3. Letting Proposal Tab

To add a new proposal to the letting, click inside the proposals grid and choose **Add** from the right mouse button menu. Trns•port displays a Proposals list window listing all proposals that have not already been assigned to a bid letting (see Figure 8-4).
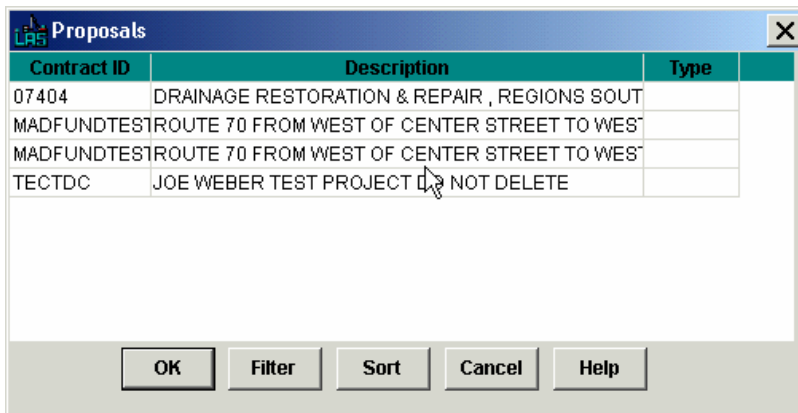
Figure 8-4. Proposals List Window

8.2.2 Letting Call Order

The Letting Call Order must be inserted manually to ensure that Capital Projects and Maintenance and Operations projects are discernable. The CPM projects shall always begin with the 100 range while the Maintenance and Operations projects shall always begin with the 400 range.

8.2.3 Changing Letting/Proposals

To change the information about a letting/proposal, click the BIDLETS button to display the Bid Lettings list window. Select a bid letting and click the LETPROP button to display the Letting/Proposals list window. Select the letting/proposal you want to change and then choose **Change** from the right mouse button menu. Trns•port displays a Letting/Proposal window.

You can add information to or change information in any fields except Letting Call Order or Notice Publication Date. When you finish making changes, click OK to save your changes or CANCEL to return to the Letting/Proposals list window without saving.

8.2.4 Changing Letting/Proposals in the Tabbed Folder Window

You can also change information about a letting/proposal in the tabbed folder window. Click the BID LETTING button to display the Bid Lettings list window. Select a bid letting and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Bid Letting tabbed folder window. Click the LETTING PROPOSALS tab.

Select the proposal you want to change in the top part of the tab. Trns•port displays all the existing information about the proposal in the detail area of the LETTING/PROPOSALS tab below the list. You can add information to or change information in any fields. You can also enter information directly into the list by selecting **Hide Detail** from the right mouse button menu.

8.2.5 Entering Date Information with the Date Fill Command

When a group of proposals assigned to a letting have the same Notice Publication Date and/or Status Date, you can add this information to all the proposals at once through the Fill Dates window.

To use this feature, click the BID LETTING button to display the Bid Lettings list window. Select a bid letting and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Bid Letting tabbed folder window. Click the LETTING PROPOSALS tab.

Select the proposals you want to change in the top part of the tab. Select **Date Fill** from the **Edit** menu or the right mouse button menu (see Figure 8-5 & Figure 8-6).
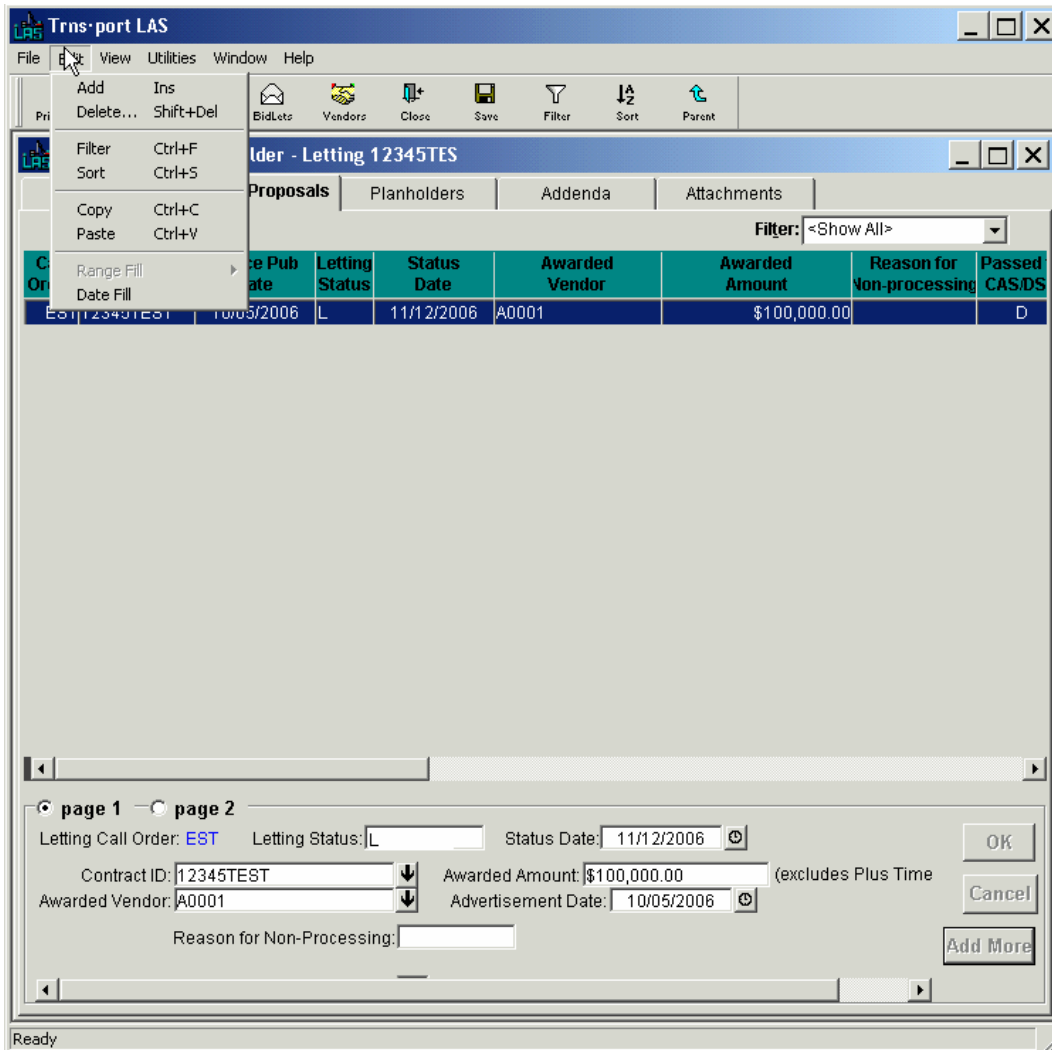
Figure 8-5. Date Fill Option on Right Mouse Button Menu

Trns•port displays the Fill Dates window.

Figure 8-6. Fill Dates Window

Enter the new date(s) into the field(s) or use the Calendar lookup button to the right of each field to select a date. Click OK.

Trns•port add the new date information to the grid.

8.2.6 Using Range Fill to Change Letting/Proposal Information

There are certain Letting/Proposal fields to which you can assign a value for several letting/proposals simultaneously. These fields include Award Status, Status Date, Notice of Publication Date, Pass Date, and some generic fields.

If you want to assign a common value to a field for all the proposals, on the Letting Proposals tab, click the header of the column you want to change to select the entire column. You can also select only a range of cells in a column by following these steps:

1. Press and hold down the ALT key

2. Click the left mouse button over the first cell in the range and drag the mouse pointer over the range of cells you want to select. Trns•port displays the selected cells in white text with black background.

    ☲   **Note**: In Hide Detail mode (the detail area of the LETTING/PROPOSAL tab is not displayed), you cannot select a range of cells beginning with an active cell (that is, when the mouse pointer in that cell resembles the letter I).

After you have selected the range of cells you want to change, select **Range Fill** from the **Edit** menu and choose **Up** or **Down**. If you choose **Up**, Trns•port will assign the value found in the bottommost cell to all the cells above it in the selected range. If you choose **Down**, Trns•port will assign the value found in the topmost cell to all the cells below it in the selected range.

Before leaving the tabbed folder window you must save the new information to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

8.3 Listing Letting/Proposals

To produce a hard copy listing of letting/proposals, select the proposal or proposals you want to list in the Letting/Proposals list window and choose **Run Process** from the right mouse button menu button. Trns•port displays the Processes list window.

Scroll down to select **List Letting Proposals**. Then click OK to submit a batch process or click CANCEL to return to the Letting/Proposals list window without submitting a process. If you click OK, Trns•port displays a Confirm Process Submission window.

Click SUBMIT to submit the batch process, PARAMETERS to change process submission parameters, or CANCEL to return to the Proposals list window without submitting the process.

8.4 Deleting a Proposal From a Bid Letting

If you withdraw a proposal or it is incorrect, you can delete it from a bid letting at any time. To delete a proposal from a bid letting, select the bid letting in the Bid Lettings list window.

Click the LETPROP button to display the Letting/Proposals list window.

Select the proposal or proposals you want to delete from the letting and choose **Run Process** from the right mouse button menu. Trns•port displays the Processes window.

Select **Delete Proposal from Bid Letting** and click OK to continue the delete process or click CANCEL to return to the Letting/Proposals list window without deleting. If you click OK, Trns•port displays a Delete Warning window.

Click YES to continue the delete process or No to return to the Letting/Proposals list window without deleting. If you click YES, Trns•port displays a Confirm Delete window.

Click SUBMIT to submit the deletion process, PARAMETERS to change process submission parameters, or CANCEL to return to the Proposals list window without submitting the process.

8.4.1 Deleting a Proposal in the Tabbed Folder Window

You can also delete proposals from a letting in the tabbed folder window. Click the BID LETTING button to display the Bid Lettings list window. Select a bid letting and choose Tabbed Folder Change from the right mouse button menu. Trns•port displays the Bid Letting tabbed folder window. Click the LETTING PROPOSALS tab.

Select the proposal in the Proposals list in the top part of the tab and choose Delete from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES in the window to complete the delete. See "Deleting Information" in Chapter 3 for more information about deleting.

> 📄 **Note**: When you delete a Proposal from a bid letting, Trns•port automatically deletes the associated planholder, bidder, bid tabulation, bid time and DBEWBE records.

8.5 Generating a Notice to Contractors and a Bid Summary Report

The Notice to Contractors is a letter to the public advertising a proposal is available for bid and an additional listing of proposals within a letting and the DBE percentage, location and classification. This process also allows you to generate a PDF version of the Notice to Contractors reports from XML output by choosing the Generate PDF Report option.

The Bid Summary report lists items, quantities, and units by part and sums them for a project. Each site in a Cost Plus Time proposal is displayed along with the Road User Cost Per Day amount. Generate this report after the proposal is set up and ready to be let. This report goes with the advertisement and is sent to magazines for publication. Design uses this report to review preliminary proposals.

If the Reporting Method installation option is set to DATE, the Generate Notice to Contractors report will only be available from the Bid Lettings list window. To generate these reports, follow these steps:

1. Select the bid letting for which you are accepting bids from the Bid Lettings list window.
2. Select **Run Process** from the right mouse button menu.
3. Select **Generate Notice to Contractors** in the Processes window.
4. Enter the Publication Date.
5. Click the **Generate PDF Report** check box, if applicable.
6. Click SUBMIT.

If the Reporting Method installation option is set to SLCT or SCRL, the Generate Notice to Contractors report will be available from both the Bid Lettings and Letting/Proposals list windows. To generate these reports, follow these steps:

1. Select the bid letting for which you are accepting bids from the Bid Lettings list window.
2. Select the proposal from the Letting/Proposals list window.

3. Select **Run Process** from the right mouse button menu.

4. Select **Generate Notice to Contractors** in the Processes window.

5. Click the **Generate PDF Report** check box, if applicable.

If you click OK, Trns•port will display the Confirm Process Submission window. Click the SUBMIT button to run the process.

8.6 Managing Planholders

You must include all vendors who purchase plans for a letting in the Planholder list for that letting. You can produce a hard copy listing of all planholders for a selected letting proposal. You can also specify the address or addresses to which addendum information should be sent for each bid letting/call for which vendors purchase contract proposals and plans.

8.6.1 Adding a Planholder

Click the VENDORS button on the button bar or select **Reference Tables** from the **File** menu and choose **Vendor List** to display the Vendors list window. Select a vendor and click the PLANHOLD button on the button bar or **select Planholders through BidLet List** from the right mouse button menu.

Trns•port displays a Bid Lettings list window that lists all bid lettings for which the selected vendor is a planholder (see Figure 8-7).
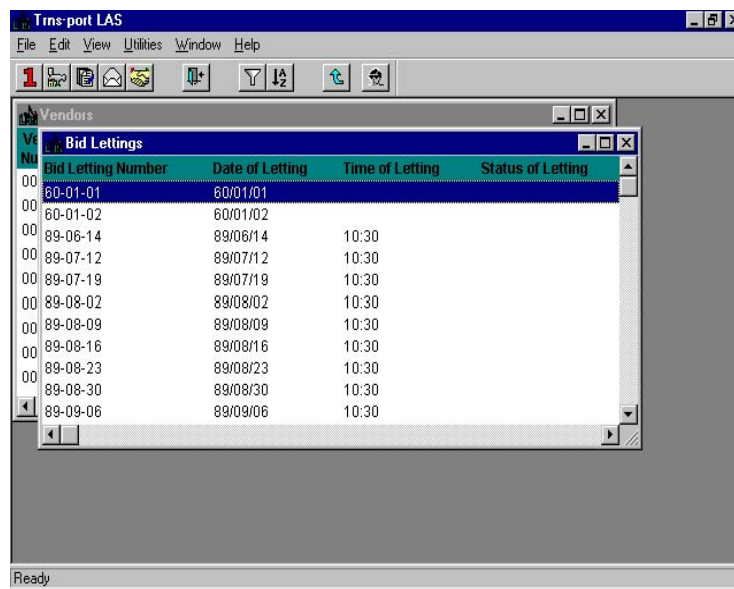
Figure 8-7. Bid Lettings List Window

Select the bid letting to which you want to add this vendor as a planholder and click the PLANHOLD button. Trns•port displays the Planholders List window (see Figure 8-8).
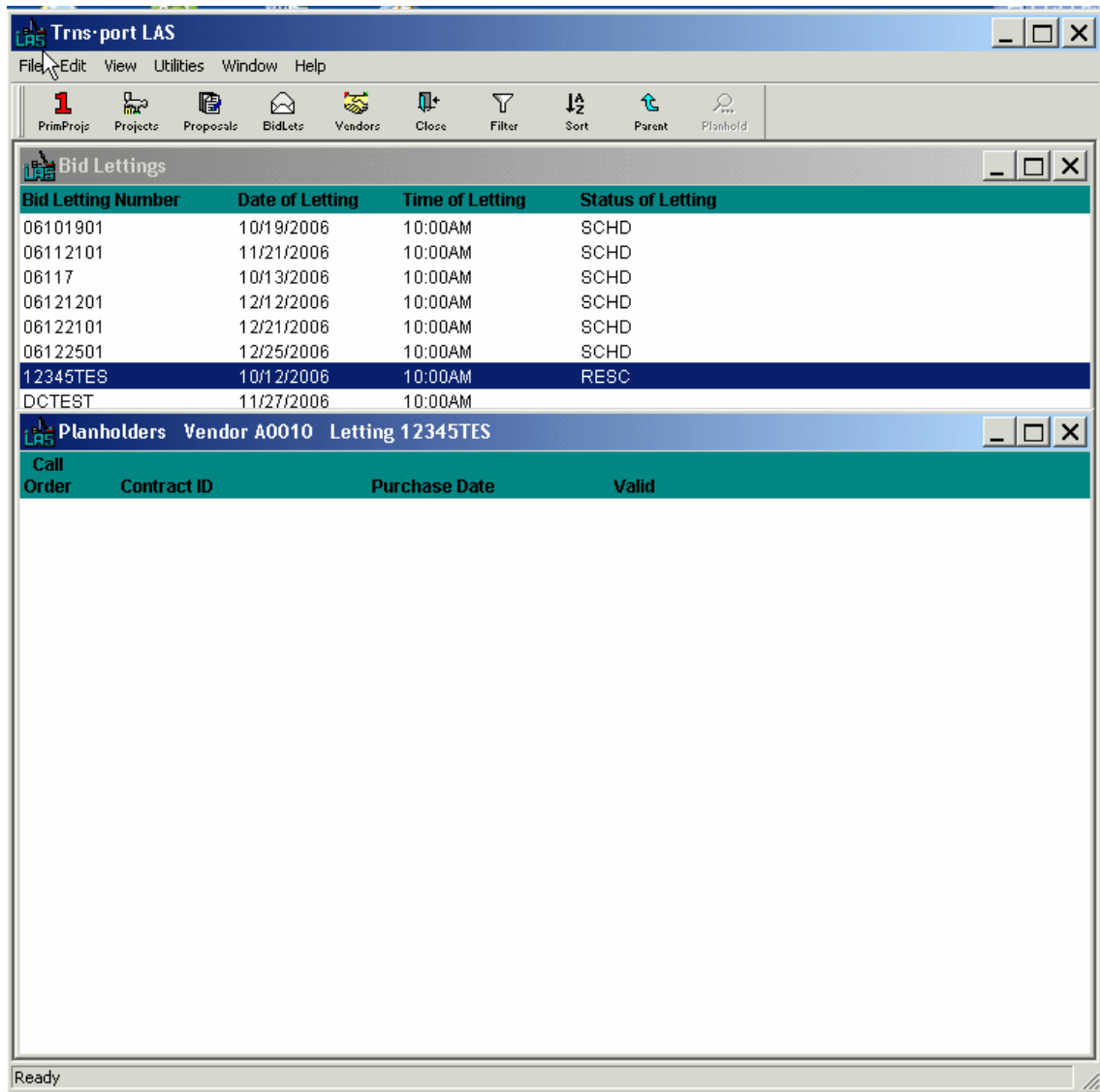
Figure 8-8. Planholders List Window

Press INSERT or select **Add** from the right mouse button menu to display the Add Planholder window (see Figure 8-9).
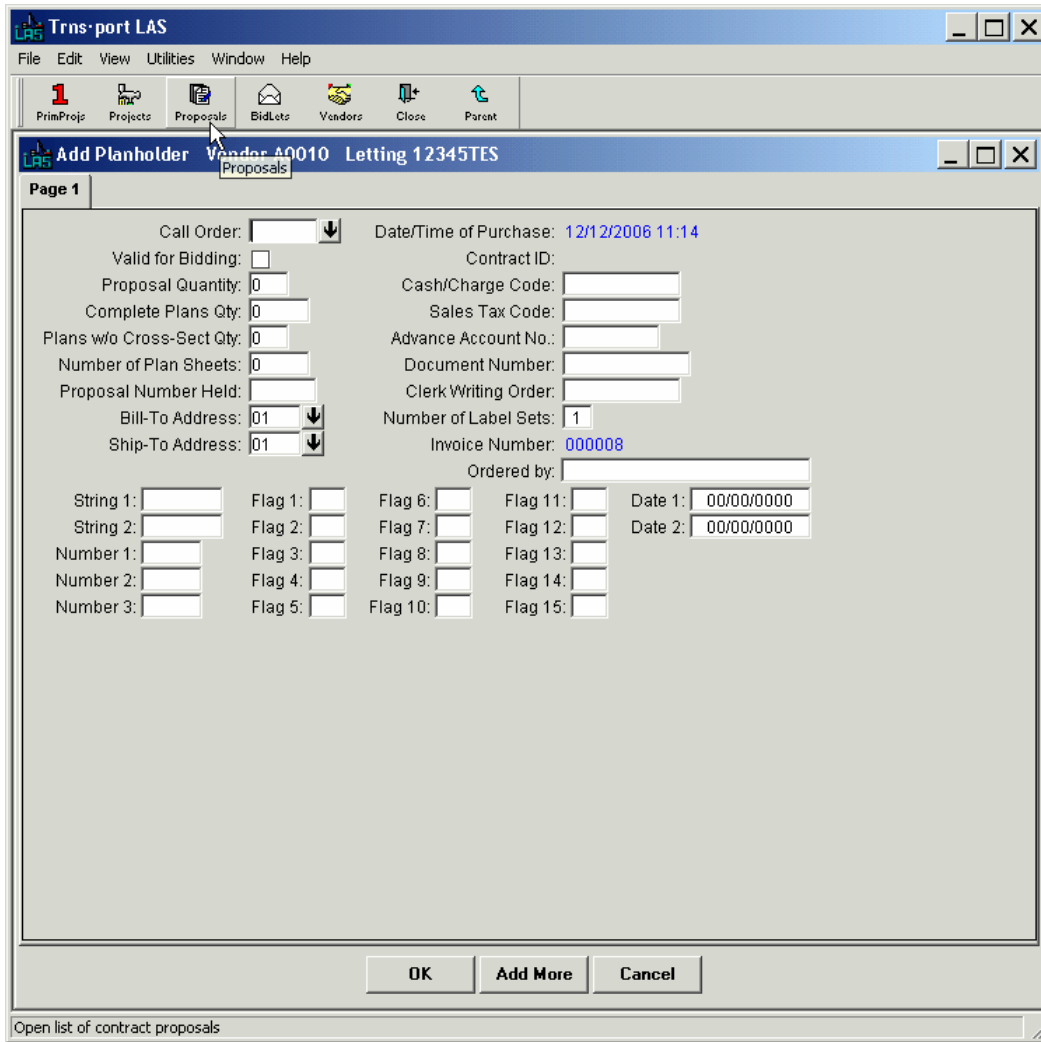
Figure 8-9. Add Planholder Window

To create a complete record you must enter information in these fields:

Call Order	The order in which you will open a bid for a specified proposal. Choose a value from that attached list.
Date and Time of Purchase	The date and time a vendor purchases a set of plans for a particular proposal. Trns•port automatically enters this field.
Valid for Bidding	The Valid for Bidding box indicates the planholder is a "legitimate" or valid bidder on the project. If the vendor is valid for bidding, click the Valid for Bidding box. If the planholder is not yet valid for bidding but plans to meet requirements to become valid, make sure this box is not checked.

You are not required to, but you can enter information in these fields to record additional information about a planholder:

Advance Account No.	If your state allows contractors to set up accounts for contractors, this field holds that number. It is not used for any Trns•port processing.
Bill-To Address	The sequence number of the planholder's billing address. Trns•port references the address information in the VENDADDR file. If the selected vendor has no addresses, you will need to add addresses.
Cash/Charge Code	A coded value (which must appear in the CHRG code table) indicating the method by which the plans were purchased.
Clerk Writing Order	A coded value indicating the person who took an order for the purchase of plans.
Complete Plans Qty.	The number of complete plans purchased by a vendor.
Contract ID	A unique identifier for a proposal or contract.
Document Number	If NJDOT has an internal referencing number or library system for documents, this field would hold that number. Trns•port does not use it in any Trns•port processing.
Invoice Number	A unique identifier for a planholder invoice.
Number of Label Sets	The number of sets of labels to be generated when you generate labels for this order. You must fill in this field for Trns•port to generate labels. Valid values are zero through nine.
Ordered by	The name of the person ordering the proposal plans.
Plans w/o Cross-sect. Qty.	The number of complete plans without cross-sections purchased by a vendor.

Proposal Number Held	If your state has a serial sequence number or a numbering system for proposals, this field would hold that number. Trns•port does not use it in any Trns•port processing.
Proposal Quantity	The number of proposals purchased by a given vendor.
Ship-To Address	The vendor address sequence number of a planholder's shipping address.

Many bidders are "courtesy" or non-bidders, which means they can buy copies of the plans, but they cannot submit bids for the proposal. You can enter information for courtesy bidders so that if the bidder meets the necessary requirements to be a valid bidder, you will only have to set the **Valid for Bidding** flag to No.

When you finish adding information for this planholder, click OK to add the selected vendor to the planholder list. If the planholder requests additional proposals, you can click ADD MORE to add the vendor as a planholder on another call.

You can return to the Bid Lettings list window to select another bid letting for this vendor. When you finish adding this vendor as a planholder, you can return to the Vendor list window to select another vendor.

8.6.2 Adding a Planholder in the Tabbed Folder Window

You can also add planholders in the tabbed folder window. Click the BID LETTING button to display the Bid Lettings list window. Select the bid letting to which you want to add a planholder and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Bid Letting tabbed folder window.

Click on the PLANHOLDERS tab. The top part of the PLANHOLDERS tab contains a list of all the planholders for the letting. The bottom part of the tab contains detail information in four pages for the planholder currently selected in the list (see Figure 8-10).
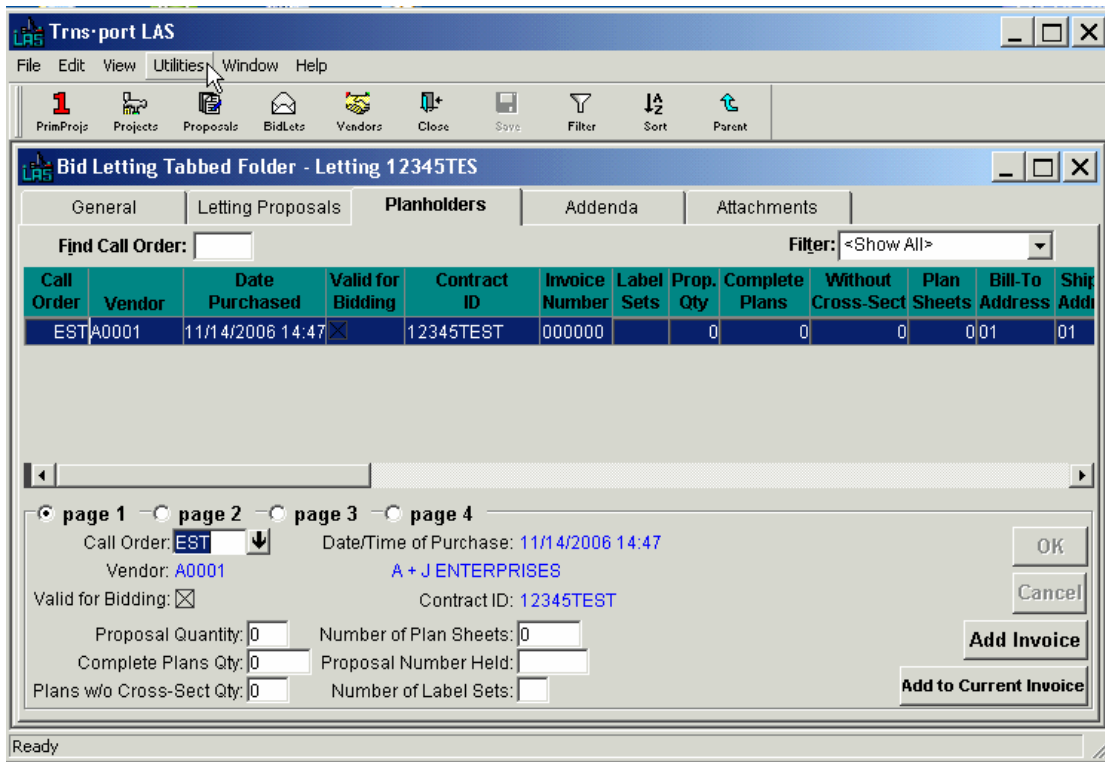
Figure 8-10. Planholders Tab

To add a new planholder to the letting, click inside the planholders list and choose **Add Invoice** from the right mouse button menu. Trns•port adds a new row to the list. The Date Purchased field will contain the current date and all other fields in the new row will be empty. Enter data into the blank fields displayed in the detail area at the bottom of the PLANHOLDERS tab. You can also enter data directly into the list fields by selecting **Hide Detail** from the right mouse button menu.

Before leaving the tabbed folder window you must save the new Planholder record to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

8.6.3 Copying Planholders

You can copy planholder information from one letting and call to another, and eliminate the need to reenter all the information for each planholder under the new letting and call. After copying the planholders, you can then enter any modifications required for the new planholder entries.

To copy planholder information from one letting and call to another, select the letting and call containing the planholders you want to copy from the Letting/Proposals List window. Select **Copy Special** from the **Edit** menu. Trns•port displays the Copy Planholders window (see Figure 8-11).

Figure 8-11. Copy Planholders Window

Click the down arrows beside the Destination Letting and Destination Call fields and select the letting and call to which you want to copy information. Click OK to copy the planholder information or CANCEL to return to the Letting/Proposals list window without copying the planholder information.

8.6.4 Changing Planholder Information

To change information about a planholder, follow these steps:

1. Select the vendor record in the Vendors list window.

2. Click the PLANHOLD button or select **Planholders through BidLet List** from the right mouse button menu button.

3. Select the planholder record in the Planholders list window.

4. Choose **Change** from the right mouse button menu button.

Trns•port displays a Planholder window.

You can add or change information in blank or red fields. When you finish making changes, click OK to save your changes or CANCEL to return to the Planholders list window without saving.

8.6.5 Changing Planholder Information in the Tabbed Folder Window

You can also change planholder information in the tabbed folder window. Click the BID LETTING button to display the Bid Lettings list window. Select a bid letting and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Bid Letting tabbed folder window. Click the PLANHOLDERS tab.

Select the planholder record you want to change in the top part of the tab. Trns•port displays all the existing information about the planholder in the detail area of the PLANHOLDERS tab below the list.

You can add information to or change information in any fields in the detail area except the blue fields. You can also enter information directly into the list by selecting **Hide Detail** from the right mouse button menu.

You can start a new invoice for any vendor by clicking the ADD INVOICE button, or add to the currently selected invoice by clicking the ADD TO CURRENT INVOICE button.

Before leaving the tabbed folder window you must save the new information to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

8.6.6 Deleting a Planholder

To delete a planholder from the selected letting/proposal, select the planholder in the Planholders list window and choose **Delete** from the right mouse button menu button. Trns•port displays a Delete Warning window.

Click YES in each of the windows to complete the delete process.

8.6.7 Deleting a Planholder in the Tabbed Folder Window

You can also delete planholders from a letting in the tabbed folder window. Click the BID LETTING button to display the Bid Lettings list window. Select a bid letting and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Bid Letting tabbed folder window. Click the PLANHOLDERS tab.

Select the planholder record you want to delete from the list and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES in the window to complete the delete

8.6.8 Listing Planholders

To produce a hard copy listing of selected planholders, click the BIDLETS button and follow these steps:

1. Select a bid letting (Bid Lettings list window).

2. Select a proposal (Letting/Proposals list window).

3. Select **List Planholders** from the Processes window (select **Run Process** from the **File** menu).

4. Click OK to submit the process. Trns•port displays a Confirm Process Submission window.

5. Click SUBMIT to submit the batch process, PARAMETERS to change process submission parameters, or CANCEL to return to the Letting/Proposals list window without submitting the process. See "Submitting Batch Processes" in Chapter 3 for more information.

8.7 Validating Planholders for Bidding

You can quickly and easily validate planholders for bidding using the Planholder Valid Flag grid window.

To open the Planholder Valid Flag grid window, select a bid letting from the Bid Lettings list window and click the VALID button or choose **Planholder Valid for Bidding List** from the right mouse button menu. Trns•port displays the Planholder Valid Flag grid window (see Figure 8-12).
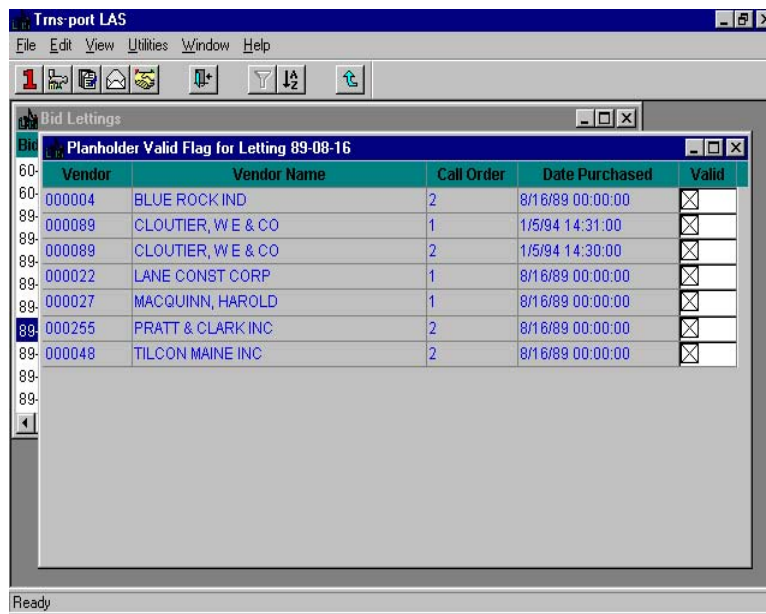
Figure 8-12. Planholder Valid Flag Grid Window

Under the Valid column, click in the check boxes next to the planholders you want to validate for bidding. If a planholder has been checked as valid, but is not, click in the check box again to clear it.

Select **Update Database** from the **File** menu to update the database with new valid planholders. Alternatively, when you attempt to close the Planholder Valid Flag window, Trns•port displays a dialog box that requests confirmation of the changes you made. Click YES to update the database, NO to return to the Planholder Valid Flag window, or CANCEL to close the window without updating the database.

8.7.1 Validating Planholders in the Tabbed Folder Window

You can also validate planholders for bidding in the tabbed folder window. To open the tabbed folder window, select a bid letting from the Bid Lettings list window and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Bid Letting tabbed folder window.

Click the PLANHOLDERS tab. The top part of the tab contains a list of all the planholders for the letting. Select the planholder you want to validate in the list and click the Validate for Bidding check box on Page 1 of the detail area of the tab. You can also click the Valid for Bidding checkbox directly in the list by selecting **Hide Detail** from the right mouse button menu.

Before leaving the tabbed folder window you must save the new planholder record by clicking the SAVE button or selecting **Save** from the file menu.

8.8 Generating Planholder Reports

To generate planholder reports, which include mailing labels for planholders, a listing of the planholders, and vendor invoices, follow these steps (see Figure 8-13 and Figure 8-14):

1. Select a bid letting from the Bid Lettings list window.

2. Select a proposal from the Letting/Proposals list window.

3. Choose **Run Process** from the **File** menu and select **Generate Planholder**

Reports from the Processes window.

4. Select **Planholder Report Options** and click OK.

To select a bid letting, click the BIDLETS button to display the Bid Lettings list window.
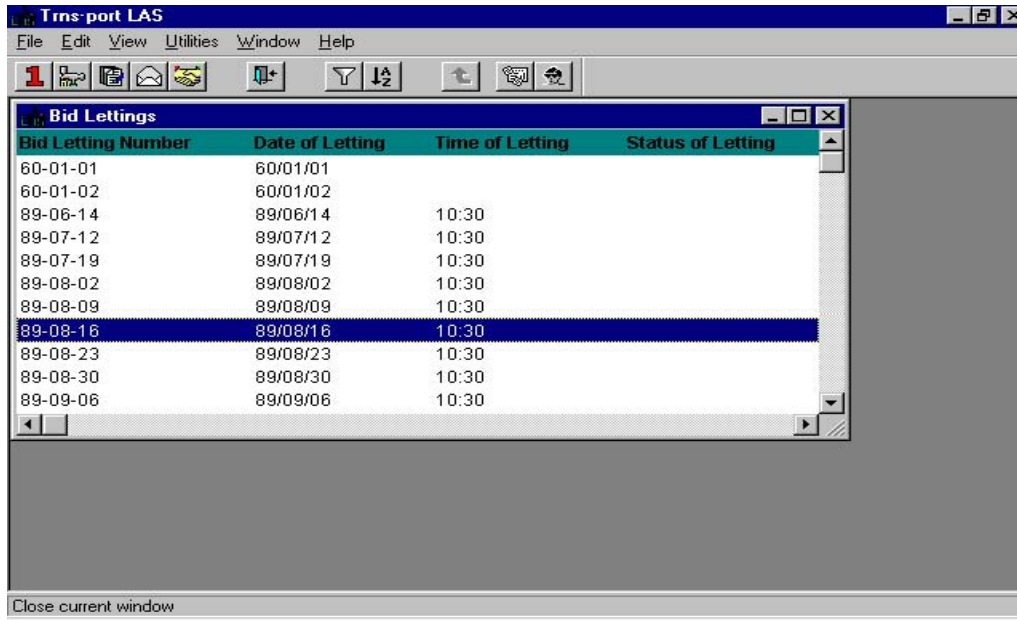
Figure 8-13. Bid Lettings List Window

Select a letting and click the LETPROP button to display the Letting/Proposals list window.
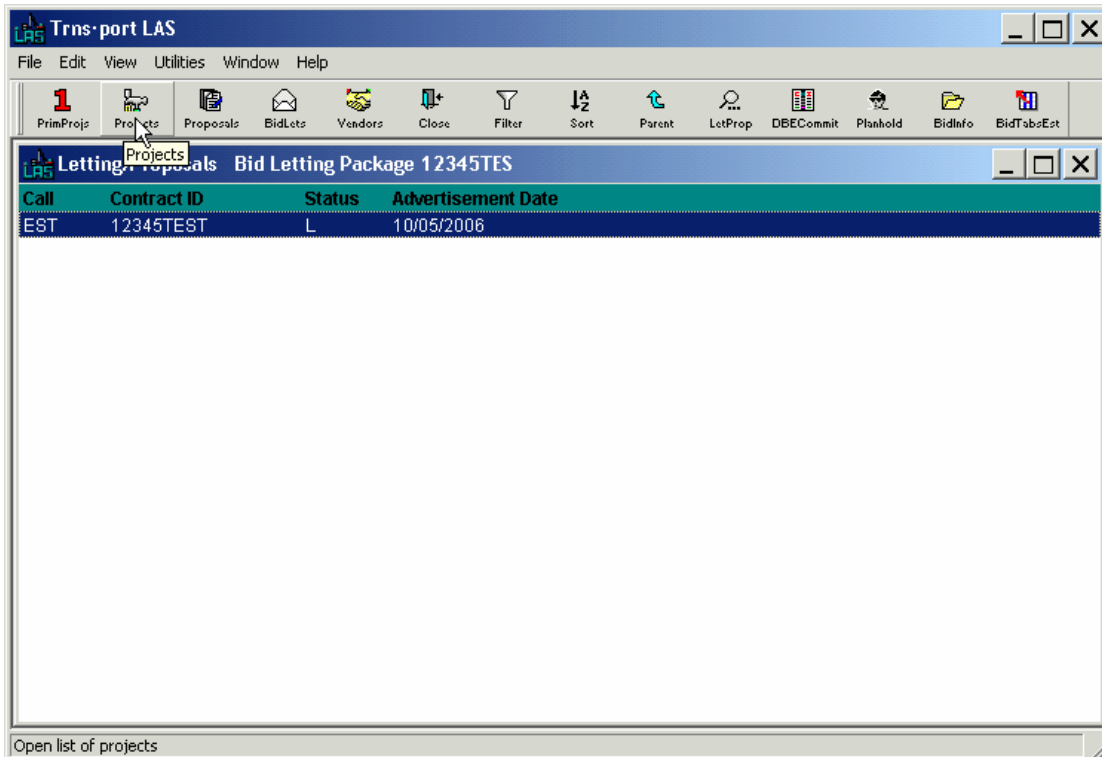
Figure 8-14. Letting/Proposals List Window

Select the proposal for which you want to run planholder reports and choose **Run Process** from the right mouse button menu. Choose **Generate Planholder Reports** from the Processes window and click OK. Trns•port displays a Planholders Report Options window (see Figure 8-15).
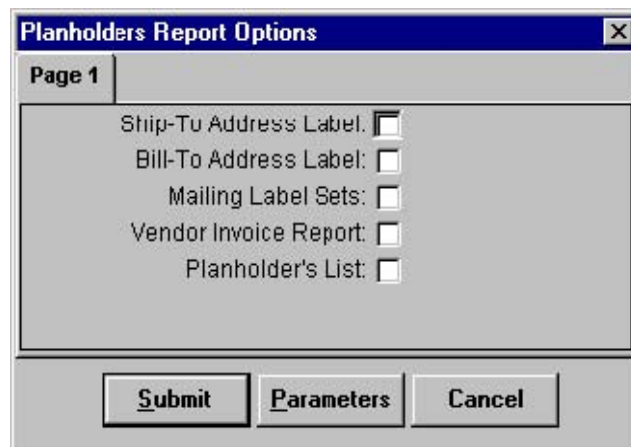
Figure 8-15. Planholders Report Options Window

Various types of mailing labels and reports are available. Click in the boxes for the options you want to generate and click SUBMIT to submit the batch process, PARAMETERS to change process submission parameters, or CANCEL to cancel the process submission.

The output can be saved and uploaded to Bid Express.

8.9 Browsing Letting/Proposal Addenda Information

After a proposal has been advertised in Trns•port PES, any subsequent changes to the proposal, such as adding or deleting items, are made by creating addenda. Although existing addenda may only be added or modified through Trns•port PES, you can browse a list of all the addenda created for proposals in a letting in the Bid Letting tabbed folder window of Trns•port LAS.

To open the tabbed folder window, select a bid letting from the Bid Lettings list window and choose **Tabbed Folder View** from the right mouse button menu. Trns•port displays the Bid Letting tabbed folder window. Click the ADDENDA tab (see Figure 8-16).
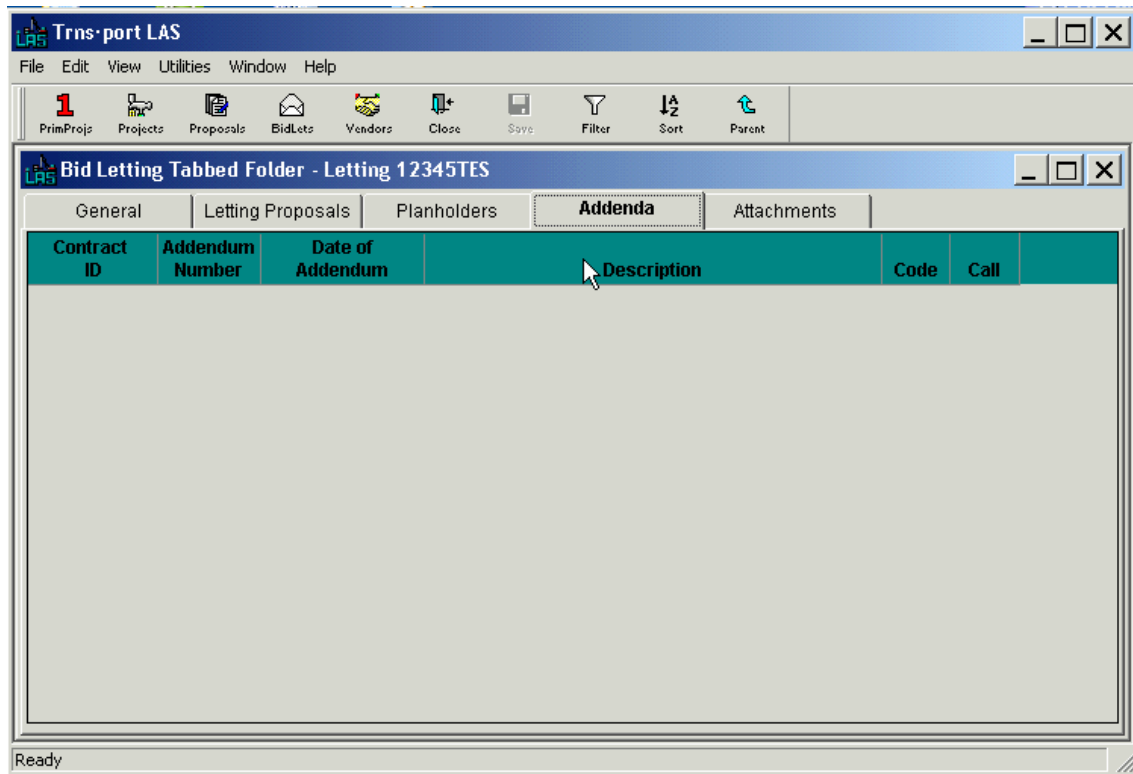
Figure 8-16. Addenda Tab

Use the scroll bars to browse the addenda information. You can also filter and sort the list as in any Trns•port list window.

8.10 Managing Bidders

All contractors who bid on letting proposals, must be entered in Trns•port as valid planholders and must be in the master vendor list. You can also produce a hard copy listing of bidders.

8.10.1 Adding Bidders to a Proposal

To add bidders to the proposal, follow these steps:

1. Select a bid letting from the Bid Lettings list window.

2. Select a proposal from the Letting/Proposals list window.

3. Open the Bidders list window.

4. Add bidder information.

Select a bid letting from the Bid Lettings list window and click the LETPROP button to view the associated proposals as you did to initialize letting proposals. Then click the BIDINFO button to display the Bidders list window (see Figure 8-17).
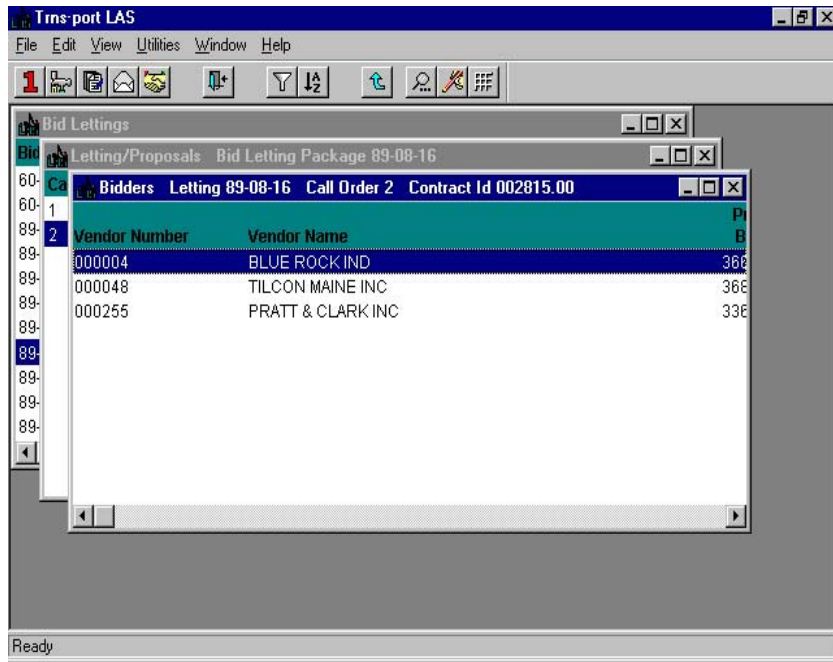
Figure 8-17. Bidders List Window

Press INSERT or select **Add** from the right mouse button menu to display the Add Bidder window shown below (see Figure 8-18).
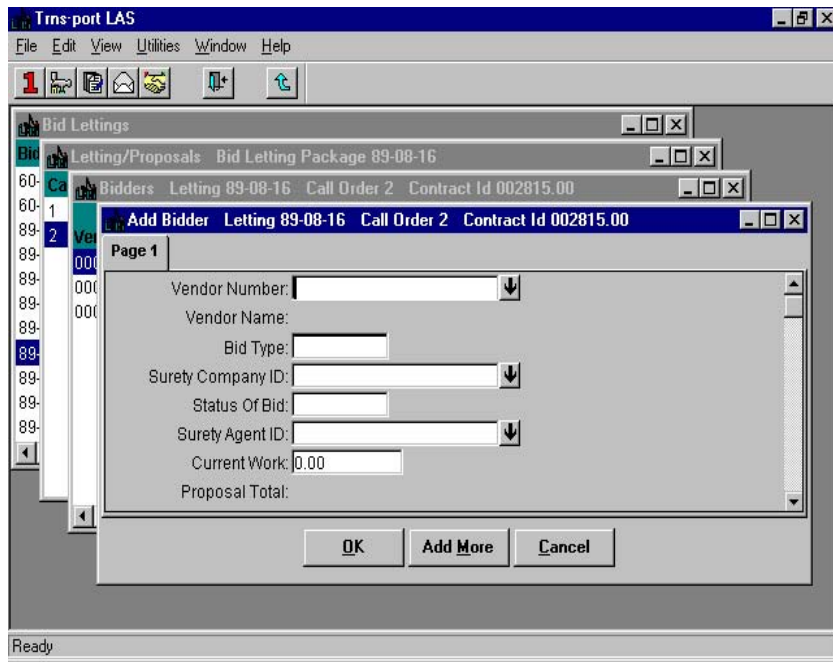
Figure 8-18. Add Bidder Window

To create a complete record you must enter information in these fields:

Vendor Number	A unique identifier for a vendor. When you fill in the Vendor Number field, Trns•port automatically enters the Vendor Name field. You can select a vendor number from the attached reference table.

You are not required to, but you can enter information in these fields to record additional information about a bidder:

Bid Exception Status	Indicates if the automated bid editing process detected any errors in the bid (such as incorrect arithmetic). Trns•port automatically enters the Bid Exception Status field when you run the Bid Tab Edit. You must run the Bid Tab Edit report before you can award a contract.
Bid Type	A coded value indicating the type of bid, which must be in the BIDTYPE code table.
Calculated Total	Trns•port calculates the vendor bid total by checking various figures on the vendor's bid tabulations. Trns•port calculates and sums item extended amounts or sums vendor section totals according to an installation option. This figure should be the same as the Proposal Bid Total. Trns•port automatically enters the Calculated Total field when you run the Bid Tab Edit. You must run the Bid Tab Edit report before you can award a contract.
Cost Plus Time Total	Computed as the sum of the Calculated Total and the Plus Time Total for the bidder.
Current Work	The current dollar amount of work the bidding vendor has outstanding.
Plus Time Total	Computed as the product of the Proposal Site Road User Cost Per Day multiplied by the corresponding Bid Time Number of Days Bid for all sites in the Proposal for that bidder
Proposal Total	The total cost of the proposal as determined by the bidder. Trns•port automatically enters the Proposal Total field when you run the Bid Tab Edit. You must run the Bid Tab Edit report before you can award a contract.

Status of Bid	A coded value indicating the status of the vendor's bid, which must be in the BIDSTAT code table. A state may indicate that a bidder is irregular by adding a code value that is in the IRREG code table (subset of BIDSTAT). A vendor marked as irregular will not be considered for award.
Supplier Only Flag	Indicates that a vendor might be a supplier of materials only.
Surety Agent ID	Trns•port treats surety agents as vendors for information storage. This field holds the vendor code of the surety agent for this bid. The value entered here must appear in the VENDOR file.
Surety Company ID	Trns•port treats surety companies as vendors for storing information in Trns•port. This field holds the vendor code of the surety company for this bid. The value entered here must appear in the VENDOR file.

When you finish entering information, click OK to add the new bidder, ADD MORE to add another bidder or CANCEL to return to the Bidders list window without adding a bidder.

8.10.2 Adding Bidders in the Tabbed Folder Window

You can also add bidders to a letting/proposal in the tabbed folder window. Select a bid letting in the Bid Lettings list window and choose **Letting Proposal List** from the right mouse button menu. Trns•port displays the Letting/Proposals list window.

In the list window select the proposal to which you want to add bidders and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Letting/Proposal tabbed folder window.

To add bidder information, click the BID MANAGEMENT tab (see Figure 8-19).
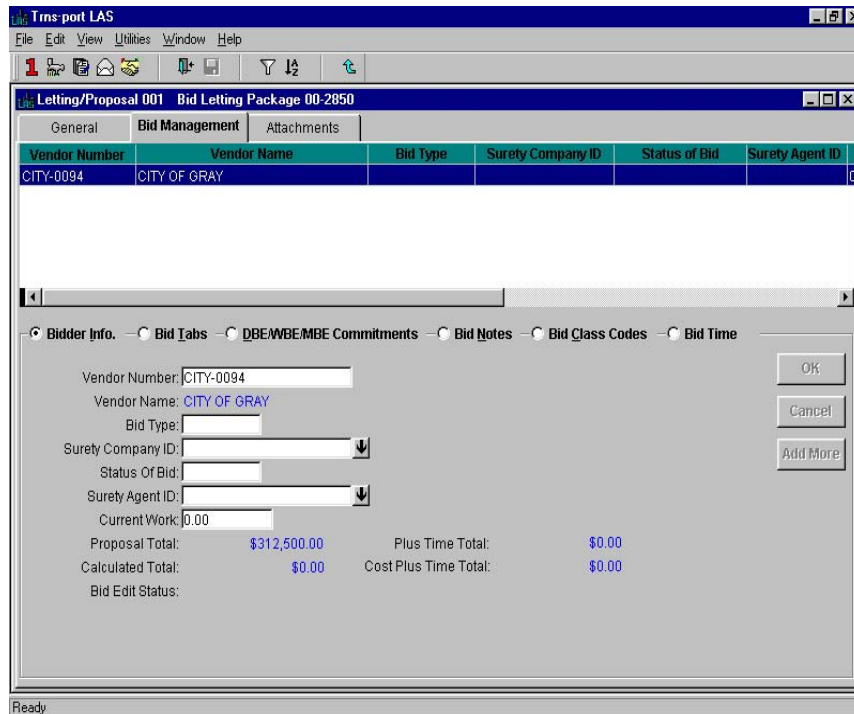
Figure 8-19. Bid Management Tab

The top part of the BID MANAGEMENT tab lists all the bidders for the selected proposal. The bottom part of the tab contains detail information for the bidder currently selected in the list.

To add a new bidder to the proposal, right click inside the bidders list and choose **Add** from the right mouse button menu. Trns•port displays a Planholders list window listing all planholders for the proposal (see Figure 8-20)
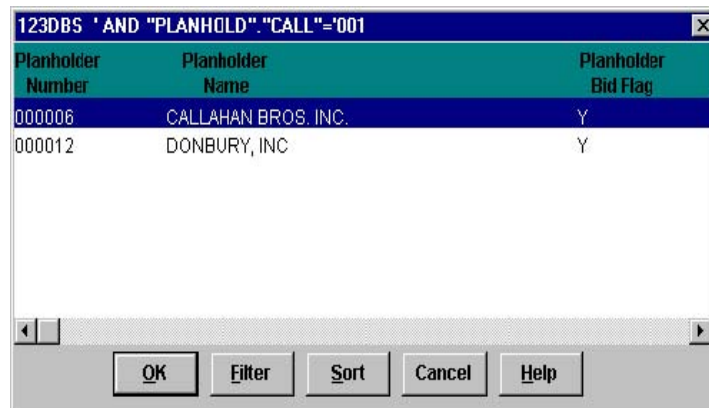
Figure 8-20. Planholders List Window

Select the planholder you want to add as a bidder from the list, using the scroll bar if necessary. You can also filter and sort the list to make it easier to find the planholder(s) you want. Click OK.

Trns•port adds the bidder to the list on the BID MANAGEMENT tab.

Before leaving the tabbed folder window you must save the new bidder record to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

8.10.3 Changing Bidder Information

To change information about a bidder, select the bidder in the Bidders list window and choose **Change** from the right mouse button menu. Trns•port displays a Bidder detail window.

You can add or change information in the empty or red fields. When you finish changing information, click OK to save the changes or CANCEL to return to the Bidders list window without saving.

8.10.4 Changing Bidder Information in the Tabbed Folder Window

You can also change information about a bidder in the tabbed folder window. To open the tabbed folder window, select a bid letting in the Bid Lettings list window and choose **Letting Proposal List** from the right mouse button menu. Trns•port displays the Letting/Proposals list window.

In the list window select the proposal for which you want to change bidder information and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Letting/Proposal tabbed folder window.

To change bidder information, click the BID MANAGEMENT tab. Select the bidder you want to change in the top part of the tab. Trns•port displays all the existing information about the bidder in the detail area below the list. You can add information to or change information in any field containing a text box. You can also enter information directly into the list by selecting **Hide Detail** from the right mouse button menu.

Before leaving the tabbed folder window you must save the new bidder information to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

8.10.5 Adding Bid Classification Codes

You can add bid class irregularity information to a bidder's record through the Letting/proposal tabbed folder window. Follow these steps to add this information:

1. Select a bid letting in the Bid Lettings list window and choose **Letting Proposal List** from the right mouse button menu. Trns•port displays the Letting/Proposals list window.

2. In the list window select the proposal for which you want to add bid classification information and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Letting/Proposal tabbed folder window.

3. Click the BID MANAGEMENT tab and select the bidder you want to change in the top part of the tab (see Figure 8-21).

4. Click the BID CLASS CODES option button. Trns•port displays a list of any classification codes and code descriptions currently associated with the bidder. You can add, change, or delete any information in the list.

5. To add a new classification code, select **Add** from the right mouse button menu. Trns•port adds a blank row to the list. Click the down arrows and select the appropriate codes for the Bid Class Code and Code Description fields. To change a classification code or description, simply click the down arrow and choose the new information.
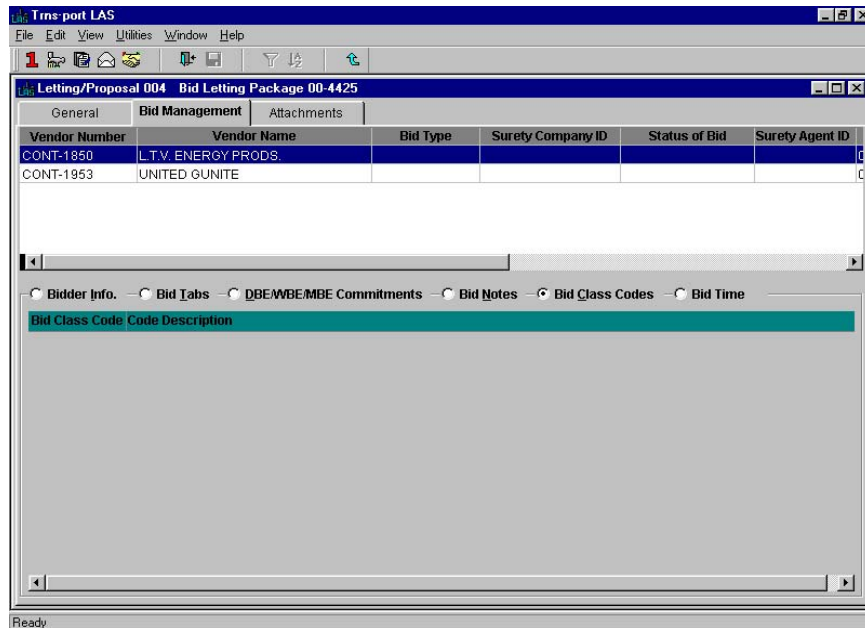
Figure 8-21. Bid Management Tab with Bid Class Codes Detail Page Displayed

6. To delete a class code record, select the row containing the record you want to delete and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window. Click YES in the window to complete the delete process.

When you have finished adding, changing or deleting bid class code information, save your changes to the database by selecting **Save** from the **File** menu.

8.10.6 Deleting a Bidder

To delete bidders from a letting/proposal, follow these steps:

1. Select a bid letting from the Bid Lettings list window.

2. Select a letting proposal from the Letting/Proposals list window.

3. Select **Bidder Information List** from the right mouse button menu.

4. Select the bidder in the Bidders list window.

5. Choose **Delete** from the right mouse button menu.

After you select the bidder in the Bidders list window and choose **Delete** from the right mouse button menu, Trns•port displays a Delete Warning window.

Click YES in each window to complete the delete process.

8.10.7 Deleting a Bidder in the Tabbed Folder Window

You can also delete bidders from a letting/proposal in the tabbed folder window. To open the tabbed folder window, select a bid letting in the Bid Lettings list window and choose **Letting Proposal List** from the right mouse button menu. Trns•port displays the Letting/Proposals list window.

In the list window select the proposal for which you want to delete bidder information and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Letting/Proposal tabbed folder window.

To delete a bidder, click the BID MANAGEMENT tab. Select the bidder you want to delete in the top part of the tab and choose **Delete** from the right mouse button menu. Trns•port

displays a Delete Warning window.

Click YES in the window to complete the delete.

8.10.8 Listing Bidders

To produce a hard copy listing of bidder information, select the letting/proposals for which you want to list information in the Letting/Proposals list window. Then choose **Run Process** from the right mouse button menu. Trns•port displays a Processes window.

Select **List Bidders** and click OK to submit a batch process. Click CANCEL to return to the Letting/Proposals list window without submitting a process. If you click OK, Trns•port displays a Confirm Process Submission window.

Click SUBMIT to submit the batch process, PARAMETERS to change process submission parameters, or CANCEL to return to the Letting/Proposals list window without making submitting the process.

8.11 Managing Bid Time Information

You can add, change and delete bid time information for a Cost Plus Time bid in the Letting/Proposal tabbed folder window.

Follow these steps to add a bid time record:

1. Select a bid letting in the Bid Lettings list window and choose **Letting Proposal List** from the right mouse button menu. Trns•port displays the Letting/Proposals list window.

2. In the list window select the proposal for which you want to add bid time information and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Letting/Proposal tabbed folder window.

3. Click the BID MANAGEMENT tab and then click the BID TIME option button. Trns•port displays a list of all the contract sites with site descriptions and any Number of Days Bid currently associated with the bidder (see Figure 8-22).

4. In the Bid Time detail window, select Add from the right mouse button menu. Trns•port adds a blank row to the list.

5. To create a complete record, enter information in these fields:

Site	Proposal sites represent work locations for which time charges are accrued. The default situation is for a single site of time charges to accrue on the contract as a whole. If contractors will construct several project entities (for example, bridges) as part of a single contract, you can treat each project entity as a separate site to assign completion time and assess liquidated damages.
Number of Days Bid	In a Cost Plus Time bid, the bid time number of days bid for the associated letting proposal's awarded vendor for an associated proposal site.
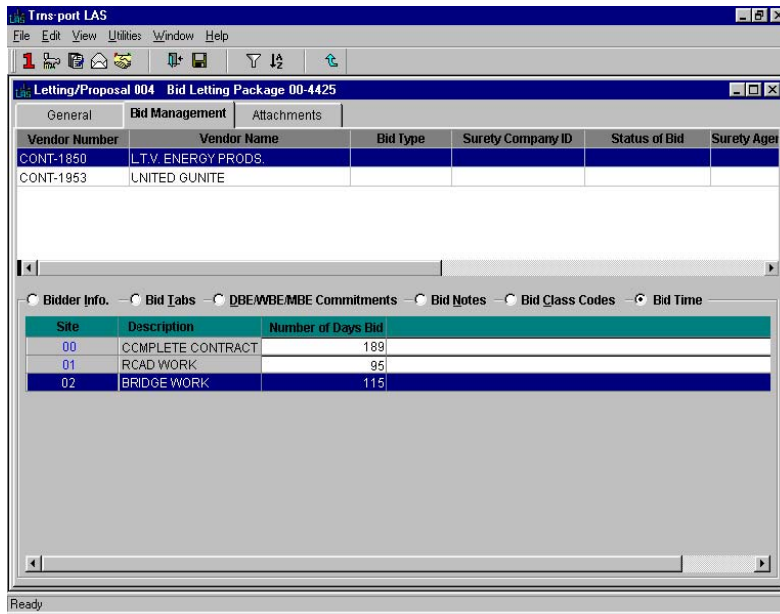
Figure 8-22. Bid Management Tab with Bid Time Detail Window Displayed

When you have finished adding bid time information, save your changes to the database by selecting **Save** from the **File** menu.

You can change information in the Site and Number of Days Bid fields by clicking in the field and typing the new information. To delete a bid time record, select the record in the list and choose Delete from the right mouse button menu.

> ! **Caution**: Adding incorrect records or deleting records for bidders may cause the bid to be marked as Irregular. Bid time records should only be maintained in this window to correct errors.

8.12 Maintaining Bidders Notes

To add notes about a bidder, select the bidder in the Bidders list window. Then choose **Bidder's Notes** from the right mouse button menu. Trns•port displays a Bidder's Notes text window (see Figure 8-23).
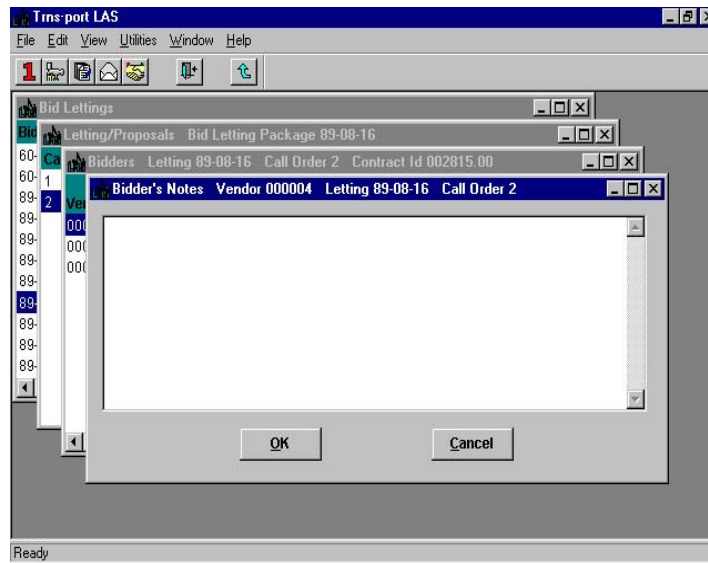
Figure 8-23. Bidder's Notes Window

You can enter notes of about 32,000 characters. Do not press ENTER at the end of each line; Trns•port automatically wraps text to a new line. If you want to start a new line, press ENTER. You can use the Windows Copy (CTRL+C) and Paste (CTRL+V) commands from the Edit menu to copy and paste text from other windows. Click OK when you finish entering information and Trns•port displays the Bidders list window. Click CANCEL to return to the Bidders list window without adding notes for a bidder.

8.12.1 Adding Bid Notes in the Tabbed Folder Window

To add notes about a bidder in the tabbed folder window, select a bid letting in the Bid Lettings list window and choose **Letting Proposal List** from the right mouse button menu. Trns•port displays the Letting/Proposals list window.

In the list window select the proposal and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Letting/Proposal tabbed folder window.

To add bid notes, click the BID MANAGEMENT tab (see Figure 8-24).
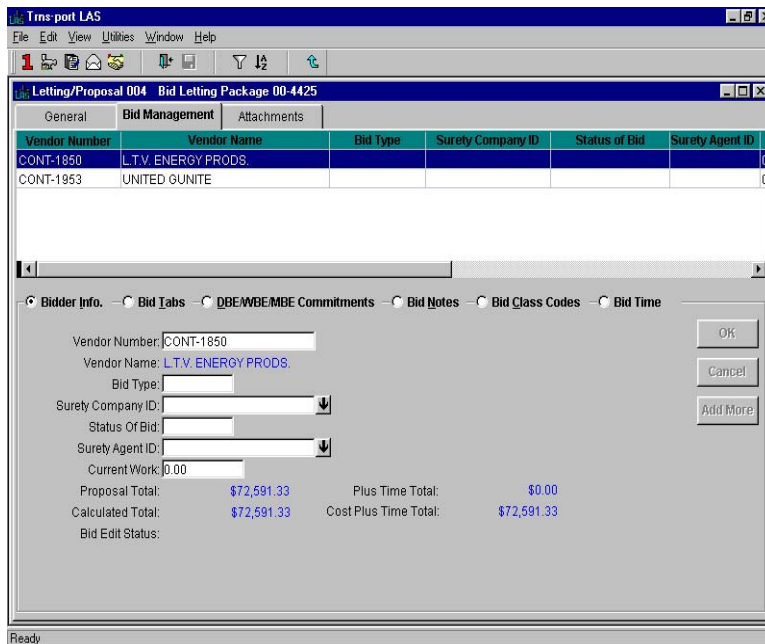
Figure 8-24. Bid Management Tab

The top part of the BID MANAGEMENT tab lists all the bidders for the selected proposal. The bottom part of the tab contains detail information for the bidder currently selected in the list. By default the tab opens with the detail area displaying bidder information.

To add new bid notes to the proposal, select a bidder from the list in the top part of the BID MANAGEMENT tab and click the BID NOTES option button. Trns•port displays the Bid Notes text page (see Figure 8-25).
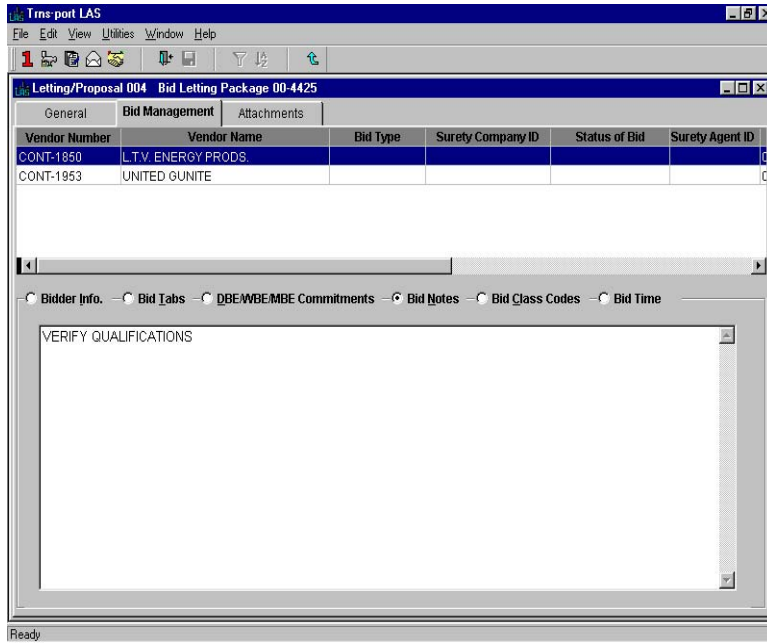
Figure 8-25. Bid Management Tab with Bid Notes Displayed

You can enter notes of about 32,000 characters. Do not press ENTER at the end of each line; Trns•port automatically wraps text to a new line. If you want to start a new line,

press ENTER. You can use the Windows Copy (CTRL+C) and Paste (CTRL+V) commands from the Edit menu to copy and paste text from other windows.

Before leaving the tabbed folder window you must save the new bid notes record to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

9.0 Analyzing Bid Tabulations

The amount a vendor bids for an item or group of items is called a bid tabulation or bid tab. You must enter bid information for each proposal item, proposal section total, and proposal total. For proposals using Cost Plus Time bidding, you must also enter bid time information.

You can enter bid tab information directly into Trns•port or you can batch load them from an external file. The data files you load might contain errors; therefore, this chapter also discusses how to correct errors.

9.1 Loading Bid Tabulations and DBE Commitments

You can add bidder, bid tab, and bid time information as well as DBE commitment information through the batch load process.

To load bid tab, DBE commitments, or bid time data from a file, follow these steps:

1. Make sure the data files are in the correct format and location for loading.
2. Run the Load Bid Tabs process.

First, you must create the data files in the proper file format. Check with your system manager to be sure the files are in place before you continue (XTABDAT.dat) then load bid tabs.

To load the data into Trns•port LAS, select **Import** from the **File** menu. Trns•port displays a confirm process submission window.

Click SUBMIT to run the process, PARAMETERS to change process parameters, or CANCEL to cancel the process.

Batch loading takes a properly formatted data file and merges it with the Trns•port database. If a bidder or DBE commitment record already exists, Trns•port will update it; otherwise, Trns•port will create a new record. **You cannot continue until Trns•port completes its work.** Trns•port will notify you when the process finishes.

9.2 Reviewing the Bid Tabulations and DBE Commitments Load Edit and Load Edit Summary Reports

When the process is complete, Trns•port prints hard copy reports.

The Bid Tab and DBE Commitment Load Edit reports identify information about each record Trns•port attempted to load. The reports will tell you which records Trns•port successfully loaded or where an error occurred. The Bid Tab Load Edit report can help you detect errors such as incorrect line numbers and nonexistent bidders or vendors. **If the report lists an error, the associated record did not load and you must enter it manually as described in Section 9.4 of this chapter.** The DBE Commitment report can help you detect errors such as incorrect DBE numbers and nonexistent vendors. **If the report lists an error, the associated record did not load and you must enter it manually.**

The Bid Tab Load Edit Summary indicates the number of input records Trns•port processed. **If Trns•port found an error in a record, the number of bid tab additions will be less than the number of records processed.** This report also indicates the total additions and changes to the Bid Tabs and Bidders files.

The DBE Commitments Load Edit Summary indicates the number of input records

Trns•port processed. **If Trns•port found an error in a record, the number of DBE commitment additions will be less than the number of records processed.** This report also indicates the total additions and changes to the DBE Commitments file.

9.3 Adding Bid Time Information Manually (NJDOT is not currently using this function)

You can manually add any Cost Plus Time bid information that was not loaded with the Load Bid Tabs function. Follow these steps to add the Number of Days Bid information for any site in the contract:

1. Select the bid letting in the Bid Lettings list window and choose **Letting Proposal List** from the right mouse button menu. Trns•port displays the Letting/Proposals list window.

2. In the list window select the proposal for which you want to add or change bid time information and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Letting/Proposal tabbed folder window.

3. Click the BID MANAGEMENT tab and then click the BID TIME option button. Trns•port displays a list of all the contract sites with site descriptions and any Number of Days Bid currently associated with the bidder (see Figure 9-1).
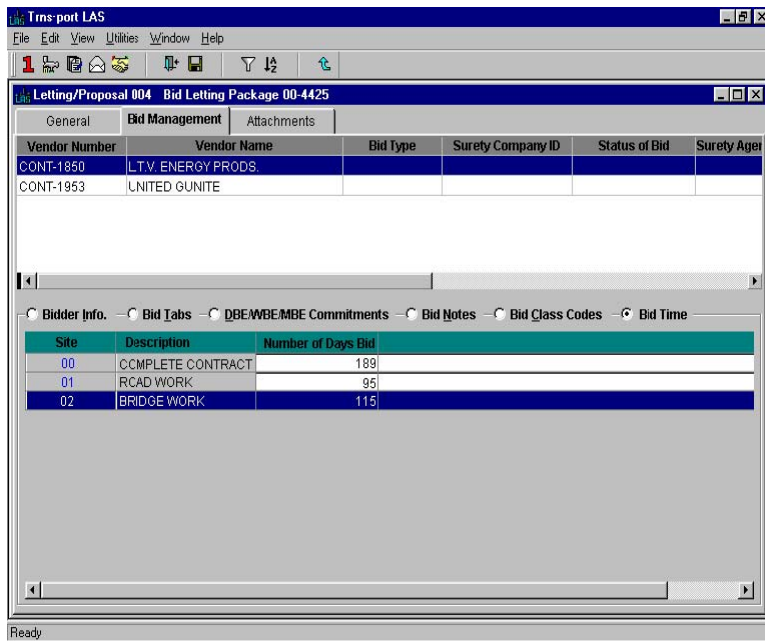
Figure 9-1. Bid Time Page of the Bid Management Tab

You can add information in the Number of Days Bid column for any site in the contract. When you have finished adding bid time information, save your changes to the database by selecting **Save** from the **File** menu.

9.4 Adding Bid Tabulations (NJDOT is currently not using this function).

You can manually enter bid tab information for proposals. You can also manually add proposal bids or correct bid data that you loaded through the Load Bid Tabs process.

You will need to manually add any records that Trns•port did not load with the Load Bid Tabs function. To add a new bid tabulation, follow these steps:

1. Determine which records need to be added and why they did not load.

2. Select a bid letting.

3. Select a proposal.

4. Select a bidder.

5. Select the Bid Tabs function.

6. Enter bid tab information.

The Bid Tabs Load Edit report shows you which records Trns•port did not load. You will need to find all the errors and find correct values for each record before you add the records directly into Trns•port LAS.

Click the BIDLETS button to display the Bid Lettings list window (see Figure 9-2).
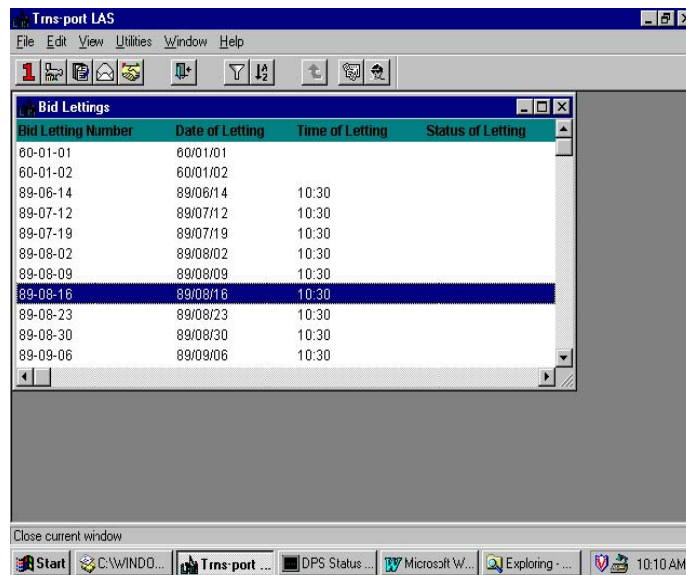
Figure 9-2. Bid Lettings List Window

Select a bid letting and click the LETPROP button to display the Letting/Proposals list window (see Figure 9-3).
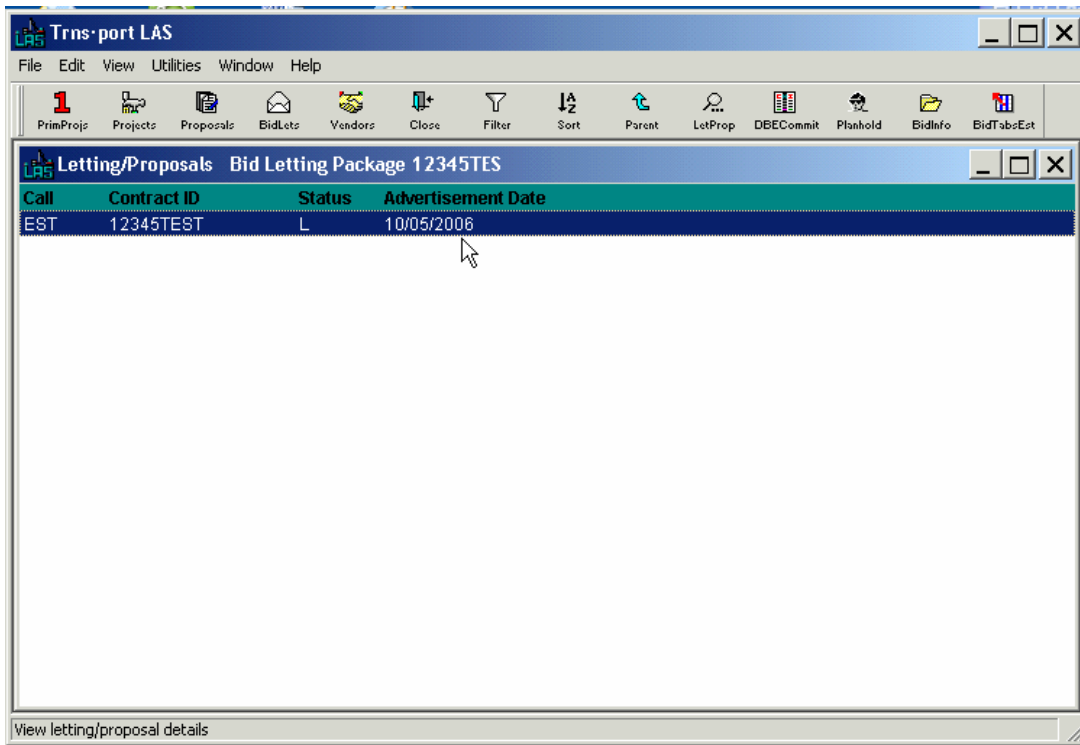
Figure 9-3. Letting/Proposals List Window

Select a proposal and click the BIDINFO button to display a Bidders list window of all bidders for the letting and proposal you selected (see Figure 9-4).
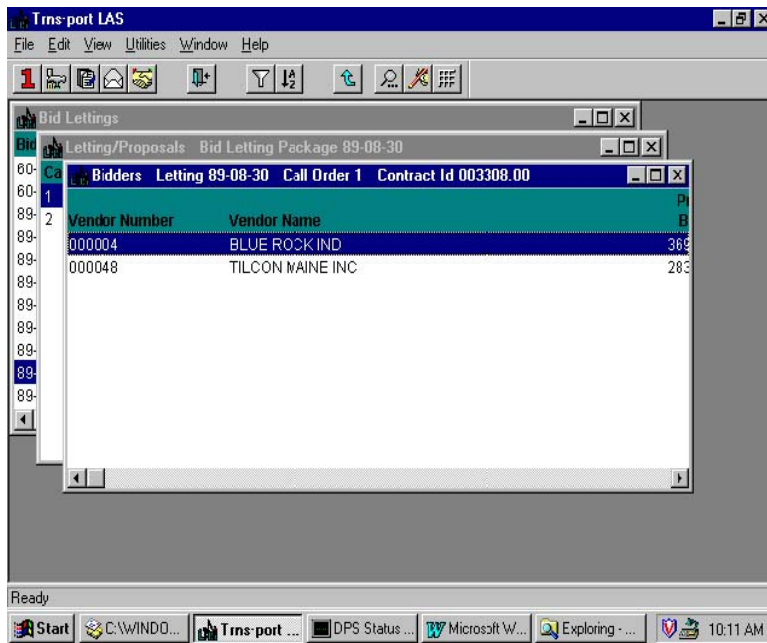
Figure 9-4. Bidders List Window

Select a bidder and click the BIDTABS button to display a list of bid tabulations for the selected vendor (see Figure 9-5).
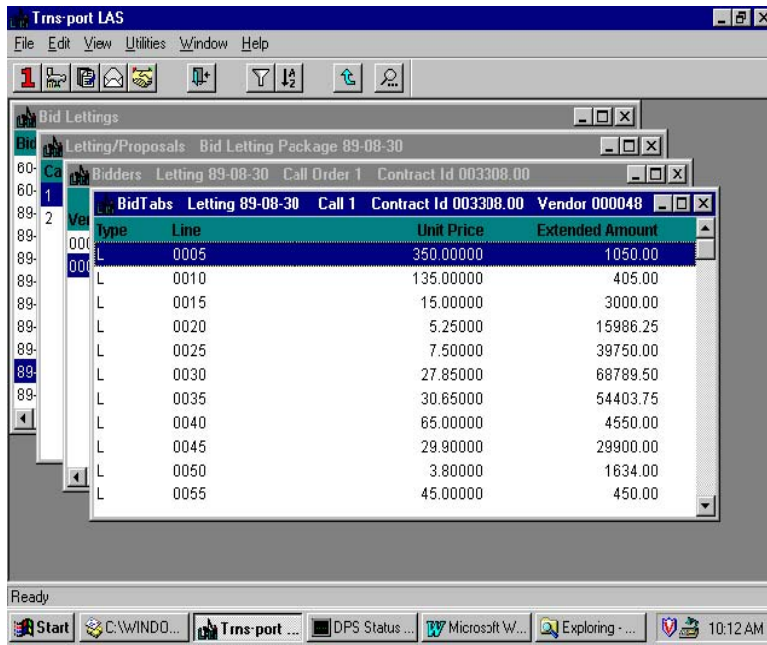
Figure 9-5. BidTabs List Window

To add a new bid tabulation, press INSERT or select **Add** from the right mouse button menu to view the Add Bid Tab window (see Figure 9-6).
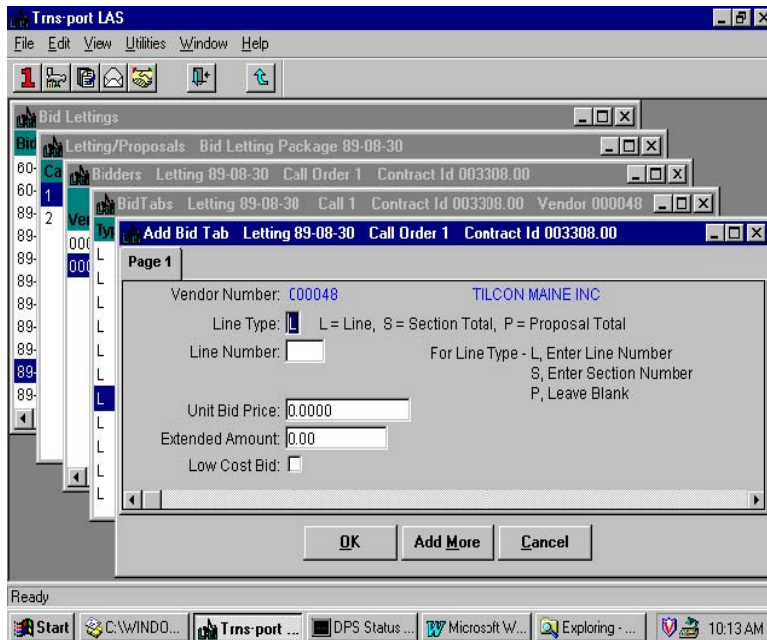
Figure 9-6. Add Bid Tab Window

To create a complete record you must enter information in this field:

Line Type   If the bid tab you are entering is for a bid item, the line type is "L", you must enter a value in the Line Number field. If it is a section bid total, the Line Type is "S", and you must enter a value in the Section Number field. If the bid tab is a bid proposal total, the Line Type is "P", you must leave the Section Number field blank.

Click OK to save the new record and return to the BidTabs list window, ADD MORE to add another bid tab record, or CANCEL to return to the BidTabs list window without adding a record.

Trns•port displays the bid tab you added at the bottom of the bid tab list.

9.5 Generating Estimate Bid Tabs (NJDOT is not currently using this function).

You can generate planholder, bid tabs, bid time, and bidder records for a selected vendor that use the engineer's estimate figures for the bidder's unit prices. This process is useful for non-bid projects that need to be passed to Trns•port SiteManager Construction for contract maintenance.

To generate estimate bid tabs, select a bid letting from the Bid Lettings list window. Then select a letting/proposal in the Letting/Proposals list window. Click the BIDTABSEST button or select **Bid Tab Estimation** from the right mouse button menu. Trns•port displays a Vendors list window (see Figure 9-7).
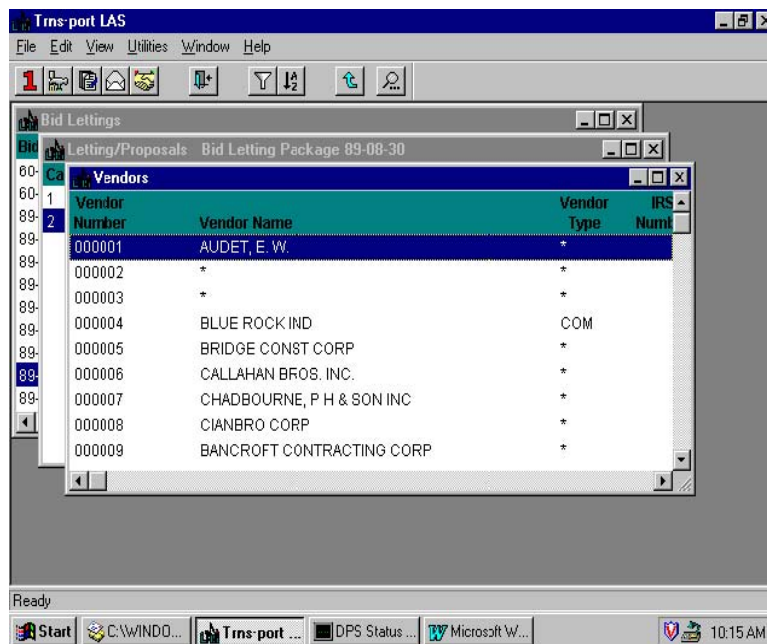
Figure 9-7. Vendors List Window

Select the vendor that will be the bidder from the Vendors list window. Then choose **Run Process** from the right mouse button menu. Trns•port displays a Processes window.

Select **Generate Estimate Bid Tabs** and click OK to submit a batch process. Trns•port displays a Confirm Process Submission window.

Click SUBMIT to continue batch process submission or click CANCEL to return to the Vendors list window without submitting the process.

9.5.1 Generating Estimate Bid Tabs in the Tabbed Folder Window (NJDOT is not currently using this function).

You can also generate estimate bid tabs in the tabbed folder window. Select a bid letting in the Bid Lettings list window and choose **Letting Proposal List** from the right mouse button menu. Trns•port displays the Letting/Proposals list window.

In the list window select the proposal for which you want to generate estimate bid tabs and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port

displays the Letting/Proposal tabbed folder window (see Figure 9-8).
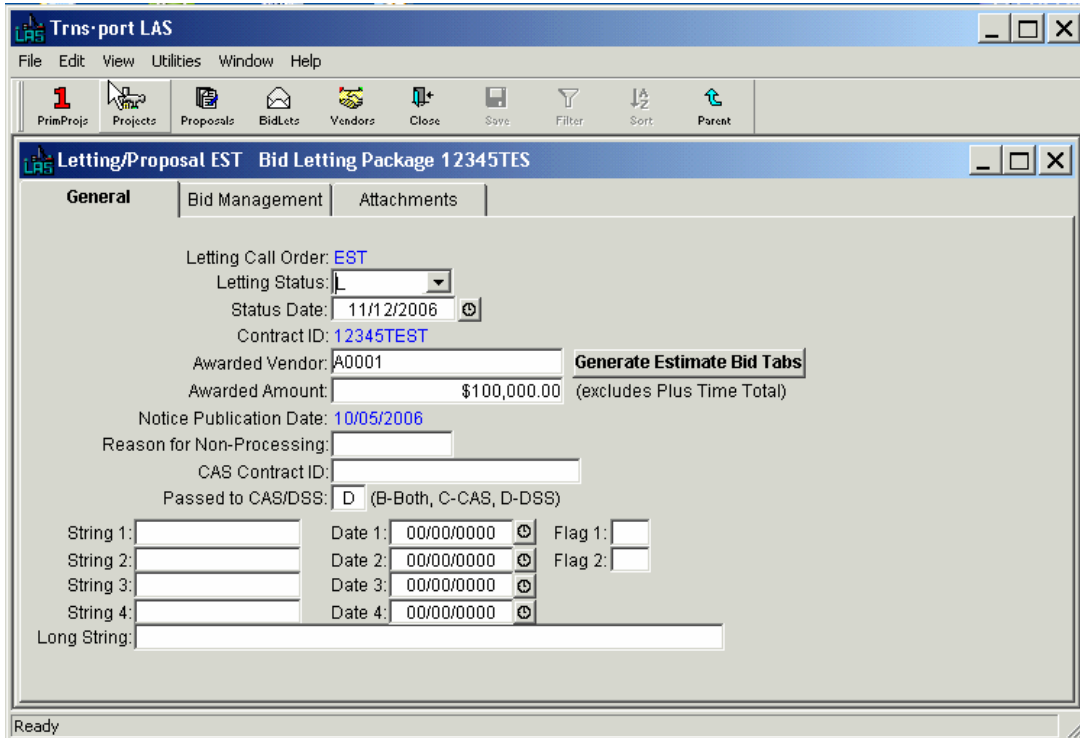
Figure 9-8. General Tab of the Letting/Proposal Tabbed Folder Window

To generate estimate bid tabs, click the GENERATE ESTIMATE BID TABS button. Trns•port displays a Vendors list window (see Figure 9-9).
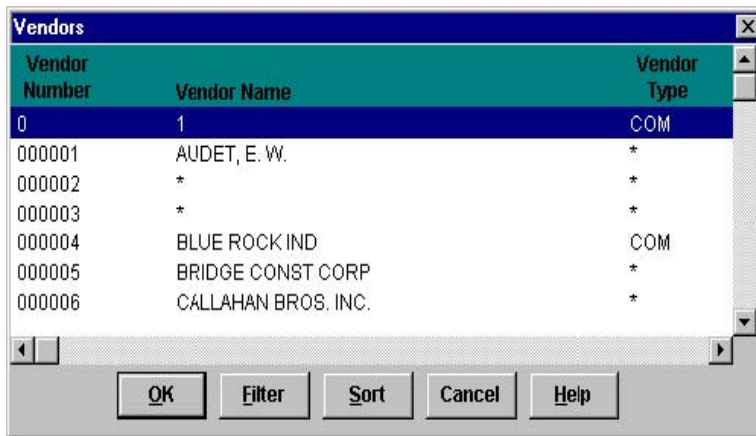
Figure 9-9. Vendors List Window

Select the vendor that will be the bidder from the Vendors list window and click OK.

9.6 Listing Bid Tabs

You can produce a hard copy listing of bid tab information to review current data values. To produce the listing, choose the letting/proposal or proposals in the Letting/Proposals list window. Then choose **Run Process** from the right mouse button menu. Trns•port displays the Processes window.

Select **List Bid Tabs** and click OK to submit the batch process. Click CANCEL to return to the Letting/Proposals list window without submitting the process. If you click OK,

Trns•port displays a Confirm Process Submission window.

Click SUBMIT to continue process submission, PARAMETERS to change process submission parameters, or CANCEL to return to the Letting/Proposals list window without submitting the process.

9.7 Generating the Bid Tab Edit Report

The Bid Tab Edit report analyzes individual line item bids for numerical accuracy. It marks irregular bids in the exception report. See Appendix D for sample output. After you generate the report and correct errors (see the next section), you can regenerate the report. You MUST generate the Bid Tab Edit Report before you can award a conctract in LAS AND before you can analyze a bid.

The report checks to make sure bidders enter extended amounts that are in line with the unit prices they offer and it tells you why bidders are irregular. For example, if a bidder lists a unit price of $85 and the known quantity is 4, the extended amount should be $340. If the vendor lists $190 instead, the vendor might appear to be the low bidder.

Follow these steps to run this report:

1. Select a bid letting from the Bid Lettings list window.

2. Select the proposals from the Letting/Proposals list window.

3. Select **Run Process** from the **File** menu and choose **Bid Tab Edit Report**.

You can select a bid letting and a proposal as you did in Section 9.4. To select all the proposals for a letting, press and hold down CTRL while you click on each proposal to select it.

Follow these steps to run the Bid Tab Edit report:

1. Select a bid letting from the Bid Lettings list window.

2. Select the proposals from the Letting/Proposals list window.

3. Select **Run Process** from the **File** menu and choose **Bid Tab Edit Report**.

You can select a bid letting and a proposal as you did in Section 9.4. To select all the proposals for a letting, press and hold down CTRL while you click on each proposal to select it.

To run the Bid Tab Edit report, select **Run Process** from the **File** menu to display the Processes window and select **Generate Bid Tab Edit Report** and click OK. This process produces a Bid Tab Edit report that details all proposals for a particular letting.

The first section of this report is the Category and Item Alternate Bid Edit. This report indicates bidding errors for category and item alternates such as incomplete bids on a set of alternates. For Cost Plus Time sites, this section will also list any missing bid time information.

The second section is the Item Bid Edit. In this section, Trns•port lists errors with proposal bid tabs, such as invalid extended amounts.

The third section is the Proposal Section Edit. If a bidder's extended amounts do not add up to the section total, Trns•port lists that information in this section.

The fourth section is the Vendor Bid Total Inconsistent with Calculated Bid Total. If a bidder's extended amounts do not add up to the proposal total, Trns•port lists that information in this section of the report.

The fifth section is the Bidders Summary, which ranks each bidder according to the calculated bid total. These rankings are "apparent" and Trns•port only considers them to be true rankings if Sections 1 through 4 of the report list no errors.

The Plus Time Bid Total column lists the Plus Time Proposal Bid for Cost Plus Time proposals. The Apparent Ranking of the bidders is based on the Bidder's Cost Plus Time amounts. For non Cost Plus Time proposals, the Apparent Ranking is based on the Calculated Proposal Total.

The bid exception status column indicates which vendors have errors. Vendors with a Bid Exception Status of Irregular will not be considered for award. Irregular bids must be corrected, and the Bid Tab Edit process run again to eliminate the irregular bid status.

9.8 Changing Bid Tabulations (This function to be performed by Procurement).

To change a unit price or extended amount for an existing bid tabs record, follow these steps:

1. Review the Bid Tab Edit report to determine the correct unit prices and extended amounts for those bid tabs with errors.
2. Select the bid letting from the Bid Lettings list window.
3. Select the proposal from the Letting/Proposals list window.
4. Choose **Bidder Information List** from the right mouse button menu.
5. Select the bidder in the Bidders list window.
6. Choose **Contract Bid Tabs List** from the right mouse button menu.
7. Select the Bid Tab record.
8. Choose **Change** from the right mouse button menu.

The Bid Tabs Edit report shows any errors it finds in bid tab records. Before you can change an existing bid tab record, you will need to find the errors and the correct values. Then you can select a bid letting, proposal, and bidder as described at the beginning of Section 9.4.

After you select a bidder, click the BIDTABS button to display the BIDTABS list window.

Select the bid tab you want to change and choose **Change** from the right mouse button menu to display the Bid Tab Window.

You can change the Unit Bid Price and Extended Amount field values. For each bid tab line item you change, click the Changed Bid Amount Flag check box.

To save your changes and return to the BidTabs list window, click OK. If you click CANCEL, Trns•port returns to the list window without making changes.

9.8.1 Changing Bid Tabulations in the Tabbed Folder Window

You can also change bid tab information in the tabbed folder window. To open the tabbed folder window, select a bid letting in the Bid Lettings list window and choose **Letting Proposal List** from the right mouse button menu. Trns•port displays the Letting/Proposals list window.

In the list window select the proposal to which you want to add bid tabs and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Letting/Proposal tabbed folder window.

Click the BID MANAGEMENT tab (see Figure 9-10).
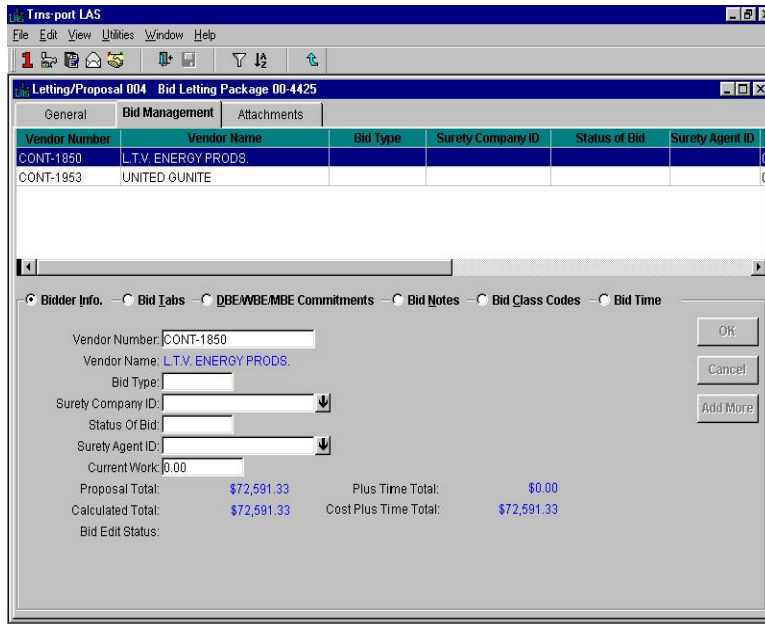
Figure 9-10. Bid Management Tab

Select a bidder from the list in the top part of the BID MANAGEMENT tab and click the BID TABS option button. Trns•port displays a grid containing all existing Proposal Item records for the letting/proposal (see Figure 9-11).
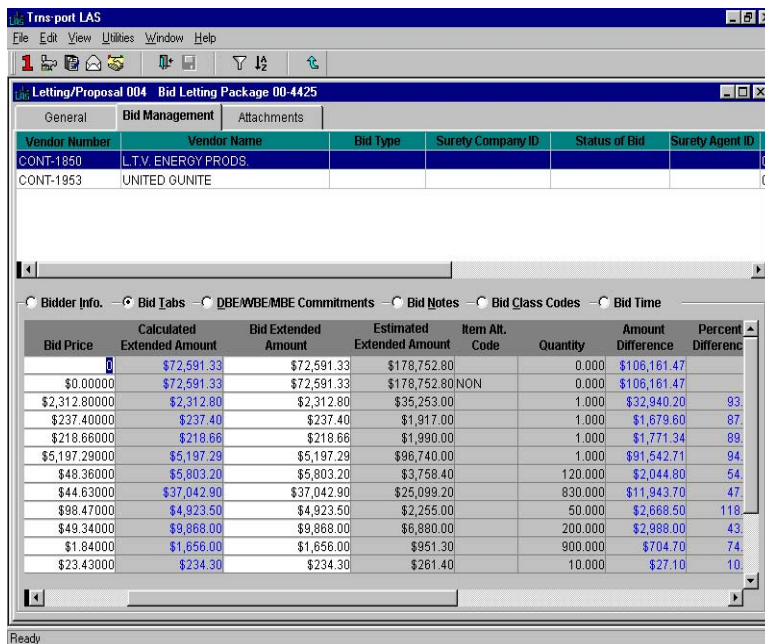
Figure 9-11. Bid Management Tab with Bid Tabs Grid Displayed

Select the bid tab record you want to change and enter the new bid price and extended amount. Click the Changed Bid Amount Flag check box.

The value in the Calculated Extended Amount, Estimated Extended Amount, and Amount Difference with Estimated Extended Amount columns will adjust automatically according to the new bid price.

9.8.2 Consistency Checking

After you have made changes to bid tabs, you can verify that the new information contained in the Bid Tab grid is accurate and valid by selecting **Consistency Checking** from the **Edit** menu or the right mouse button menu.

If Trns•port finds an error, a warning will be displayed and the Error Flag checkbox for the lines in error will be checked.

Before leaving the tabbed folder window you must save the new bid price information to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

9.9 Generating the Bid Tab Analysis Report

To compare bidder's estimates with each other and with the engineer's estimate, you can run the Bid Tab Analysis report.

> 📄 **Note**: Do not run the Bid Tab Analysis report until you correct errors with the Bid Tab Edit process. If a vendor has an irregular bid and you do not correct it, Trns•port will not use that vendor's bid in the bid tab analysis.

Report results can help you evaluate bids and award contracts. The report includes an item by item report, a low bid summary, and Trns•port's recommendation. To produce the report, follow these steps:

To produce the report, follow these steps:

1. Select a bid letting from the Bid Lettings list window.

2. Select a proposal from the Letting/Proposals list window.

3. Choose **Run Process** from the **File** menu and run the Generate Bid Tab Analysis process.

4. Select the report sections you want Trns•port to run.

5. Review the report output.

Select a bid letting and proposal following the steps at the beginning Section 9.4. Then select **Run Process** from the **File** menu and choose **Generate Bid Tab Analysis** from the Processes window. Trns•port displays the Bid Tab Analysis Options window (see Figure 9-12).
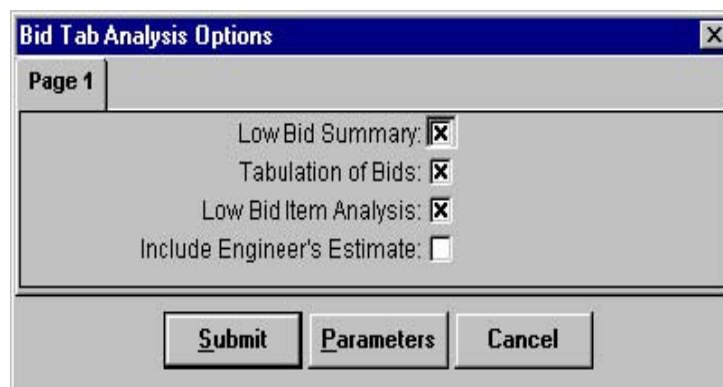
Figure 9-12. Bid Tab Analysis Options Window

Click in the Include Engineer's Estimate field so that Trns•port includes the engineer's estimate values in the report and click OK to run the process.

The first section of the report is the Low Bid Summary, which indicates the low bidder

and low bid value (corrected bid) and the engineer's estimate of the cost (estimated cost). Additionally, Trns•port records the low bid as a percentage of the engineer's estimate and as a dollar value over or under the engineer's estimate. For Cost Plus Time proposals, this section of the report displays the Total Cost and the Total Bid, both of which include the Time Bid portion.

The second section of the report is the Vendor Ranking. Trns•port ranks all bidders for the selected proposal belonging to the selected letting according to bid total. If a vendor submitted a bid that was lower than the engineer's estimate, that bidder would receive the zero ranking. For Cost Plus Time proposals, the vendor ranking will be based on the Cost Plus Time amount rather than the calculated item total.

The third section of the report is the Tabulation of Bids. This section lists proposal header information, vendor ranking with bid totals, and item bid information for each proposal. The report displays the item bid information with three vendors per page of output. The engineer's estimate appears as the first vendor if the report was generated to include the engineer's estimate. For Cost Plus Time proposals, the vendor ranking section of the report is based on the Bidder's Cost Plus Time Total amount.

The fourth section of the report is the Low Bid Item Analysis. This report lists proposal header information, vendor rank and bid total information, and a detailed item price comparison between the low bidder and the engineer's estimate for each proposal in the selected letting. For Cost Plus Time proposals, the vendor ranking section of this report displays values based on the cost of the proposal plus the time bid. The last row of this report displays totals including the time bid, for each vendor.

9.10 Deleting Bid Tabulations

To delete bid tab information, select the record or records you want to delete in the BidTabs list window and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES in each window to complete the delete process.

10.0 Awarding a Contract

After you initialize the proposal, assign bidders, and add bid tab information, you are ready to create a contract and produce final reports. A Trns•port contract is essentially a Trns•port proposal you have let and awarded.

10.1 Generating and Reviewing the Bid Letting Summary Report (Post-Letting)

The Bid Letting Summary shows the status of each contract proposal for the selected lettings. It also shows the winning vendor and contract amount if you award the proposal. You can also generate a Bid Letting Addendums Summary, a Bid Letting History report, and a Pre-Qualified Contractors report.

You can also generate this report before a letting. **You do not have to generate this report to award a contract, but you do have to generate the Bid Tab Edit and Bid Tab Analysis reports (see Chapter 9).**

To generate the Bid Letting Summary report, follow these steps:

1. Select a bid letting from the Bid Lettings list window.

2. Select a proposal from the Letting/Proposals list window.

3. Select Run Process from the File menu and choose Bid Letting Summary.

4. Select the report sections you want Trns•port to produce.

5. Run the process. Click the BIDLETS button to display the Bid Lettings list window (see Figure 10-1).
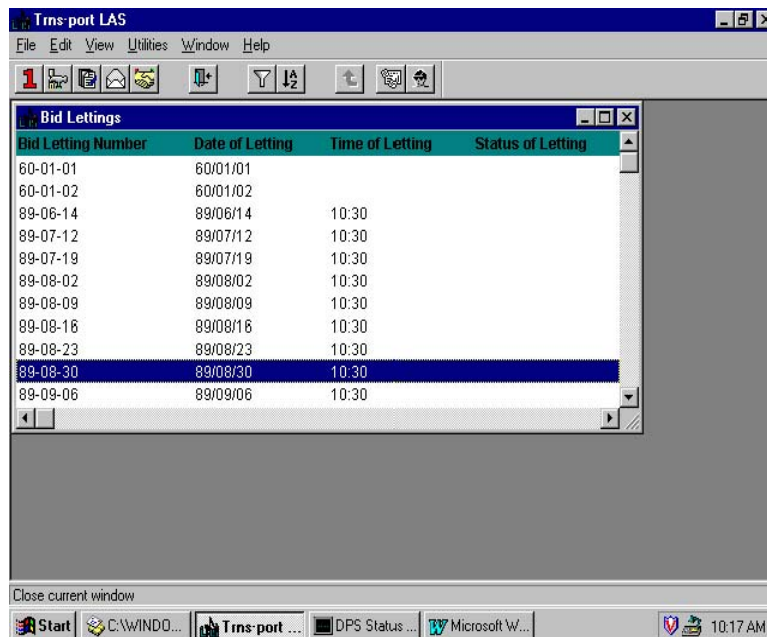
Figure 10-1. Bid Lettings List Window

Select a bid letting and click the LETPROP button to display the Letting/Proposals list window (see Figure 10-2).
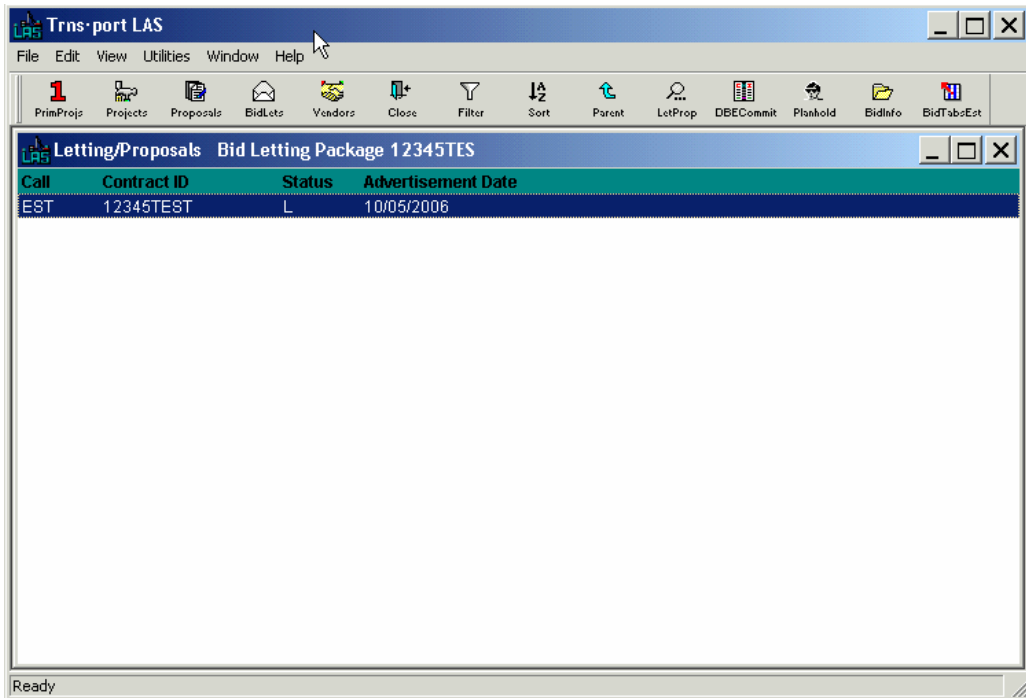
Figure 10-2. Letting/Proposals List Window

Select a proposal and choose **Run Process** from the **File** Menu.

Choose **Generate Bid Letting Summary** and click OK. Trns*port displays the Bid Letting Summary Options window (see Figure 10-3)
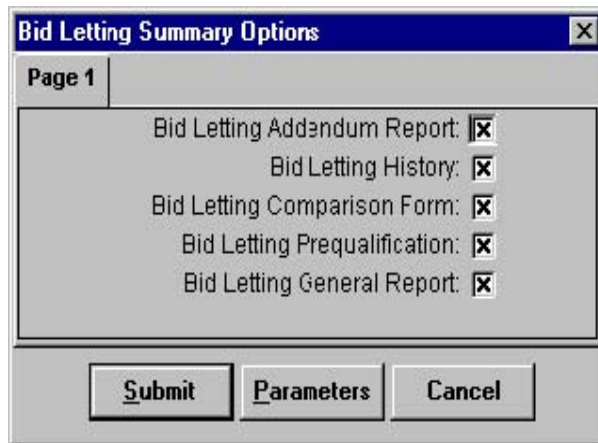
Figure 10-3. Bid Letting Summary Options Window

Select the report sections you want to produce by clicking in the check boxes and click SUBMIT to run the process. Click OK in the Job Monitor window.

The first section of the report lists any addendums for any of the proposals in the bid letting package.

The second section of the report is the Bid Letting Comparison form. This section lists the proposals in call-order sequence and includes selected proposal information and blank fields for manual entry at the bid letting. For Cost Plus Time proposals, this report includes the Cost Plus Time Total in the Corrected Low Bid column for proposals that have been identified as Cost Plus Time proposals. The Apparent Low Bid column contains a notation that the proposal is a Cost Plus Time proposal.

The third section, Bid Letting History, lists summary information about the contract if you previously let it but the contract was rejected. This section also shows current letting information.

The fourth section, Letting Award Summary, lists information about the winning vendor.

The fifth section lists prequalified contractors. This report lists all vendors who have a vendor work classification (VENCLASS table) that matches one of the three proposal work classification fields.

10.2 Assigning a Contract Identifier to a Proposal and Awarding It

After the bids are in and analyzed, follow these steps to award the contract:

1. Select a bid letting from the Bid Lettings list window.

2. Select a proposal from the Letting/Proposals list window.

3. Select **Change** from the right mouse button menu.

4. Enter the letting status.

Click the BIDLETS button to display the Bid Lettings list window. Select a bid letting and click the LETPROP button to display the Letting/Proposals list window. Select a proposal and click the LETPROP button (or select **Letting Proposal** from the right mouse button menu) to display the Letting/Proposal tab window (see Figure 10-4).
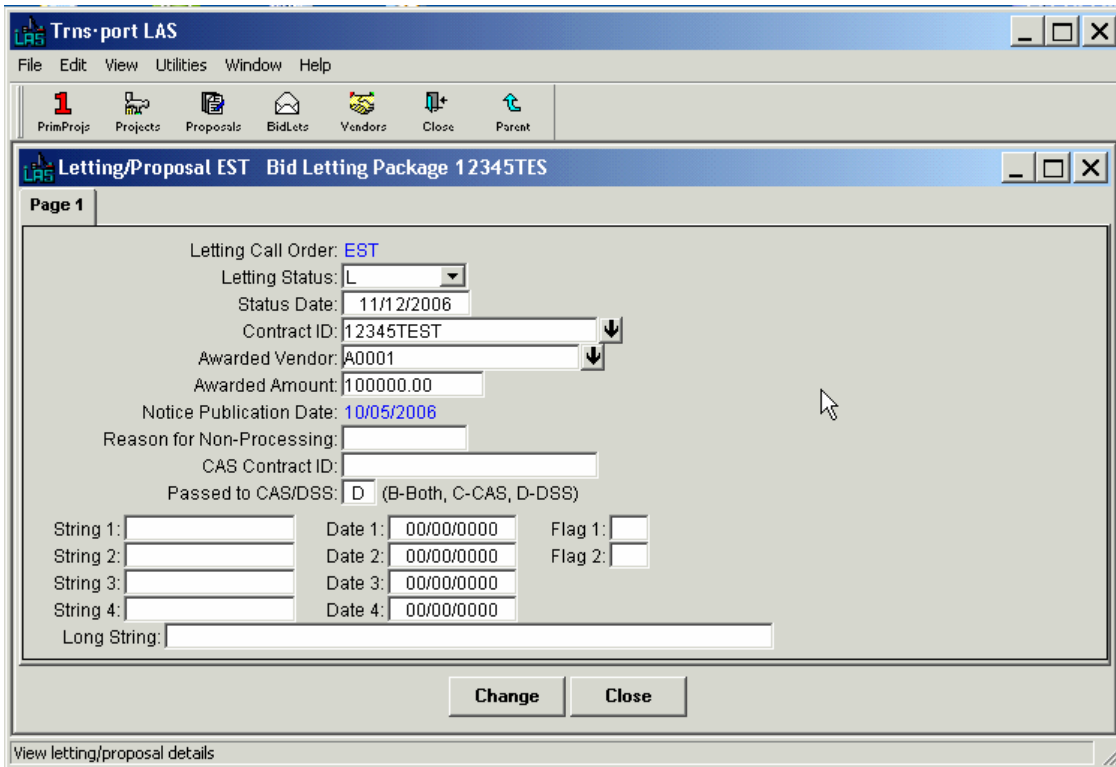
Figure 10-4. Letting/Proposal Tab Window

You can change the Letting Status by clicking on the down arrow next to the field and selecting from the attached list box. To award the contract, select the code value for award from the drop down list.

You can award a contract to a vendor other than the low bidder by changing the information in the Awarded Vendor field. When you change the awarded vendor,

Trns•port automatically updates the Awarded Amount field to the new awarded vendor's bid total.

> 📄 **Note:** If you regenerate the Bid Tab Analysis, Trns•port will overwrite these fields by the calculated low bidder and amount.

10.2.1 Awarding a Contract in the Tabbed Folder Window

You can also award a contract to a bidder in either the Letting/Proposal tabbed folder window or the Bid Letting tabbed folder window.

To award a contract in the Letting/Proposal tabbed folder window, select a bid letting in the Bid Lettings list window and choose **Letting Proposal List** from the right mouse button menu. Trns•port displays the Letting/Proposals list window.

In the list window select the proposal and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Letting/Proposal tabbed folder window with the GENERAL tab open by default (see Figure 10-5).
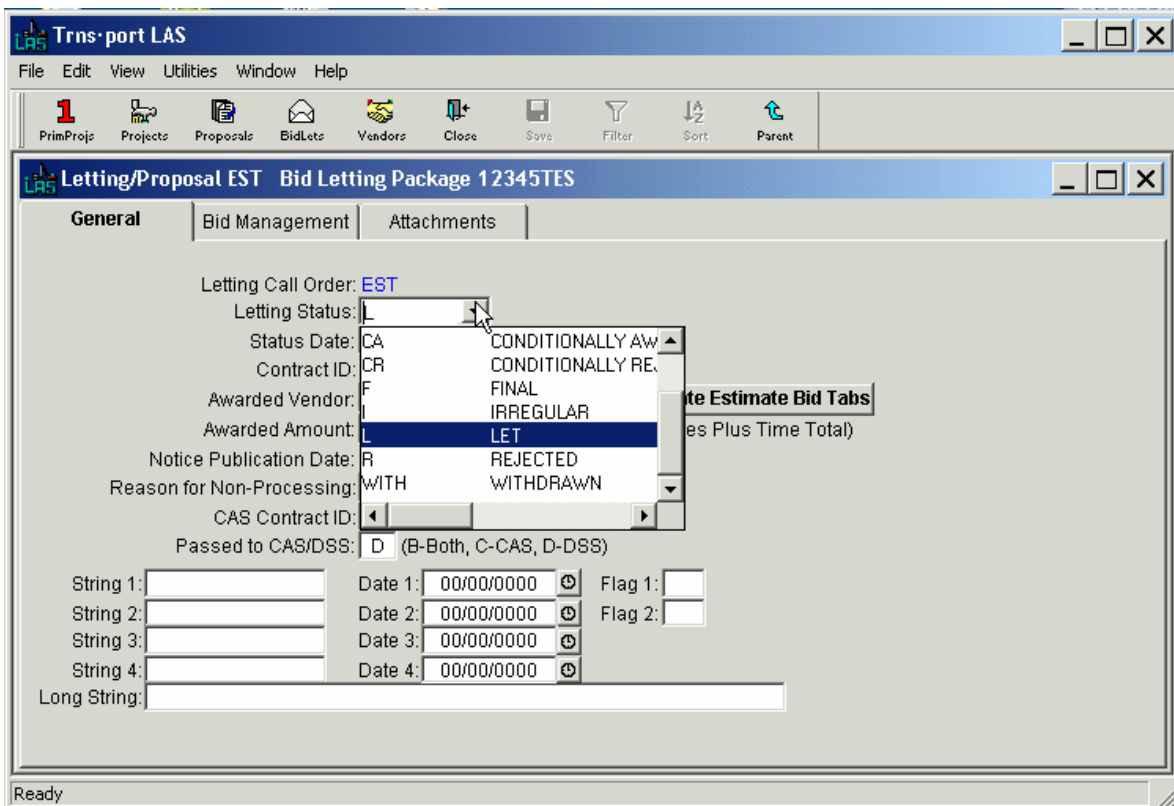
Figure 10-5. Awarding a Contract in the Letting/Proposal Tabbed Folder Window

To award a contract in the Bid Letting tabbed folder window, select a bid letting in the Bid Lettings list window and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Bid Letting tabbed folder window with the GENERAL tab open (see Figure 10-6).
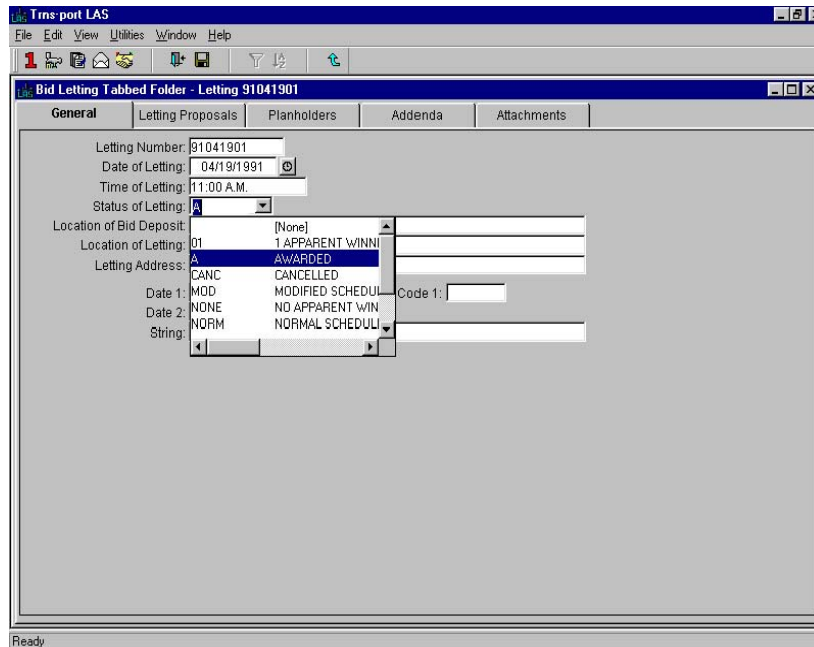
Figure 10-6. Awarding a Contract in the Bid Letting Tabbed Folder Window

Change the letting status in either tabbed folder by clicking on the down arrow next to the Letting Status field and selecting from the attached list box. Select **A** to award the contract.

The Bid Tab Analysis process determines the low bidder, and puts the awarded vendor number and awarded amount into the database. You can award a contract to a vendor other than the low bidder by changing the information in the Awarded Vendor field. When you change the awarded vendor, Trns•port automatically updates the Awarded Amount field to the new awarded vendor's bid total.

> 📄 **Note:** If you regenerate the Bid Tab Analysis, Trns•port will overwrite these fields by the calculated low bidder and amount.

Before leaving the tabbed folder window you must save the award information to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

10.2.2 Generating the Awarded Vendor Mailing Labels

To generate mailing labels for a vendor who was awarded a contract, select the bid letting from the Bid Letting list window. Open the Letting/Proposal list window and select the Letting/Proposal of the winning vendor for whom you want to generate mailing labels.

Then choose **Run Process** from the right mouse button menu to display the Processes window. Choose **Generate Vendor Mailing Labels** from the Processes window. Trns•port displays the Generate Vendor Mailing Labels parameter window (see Figure 10-7).
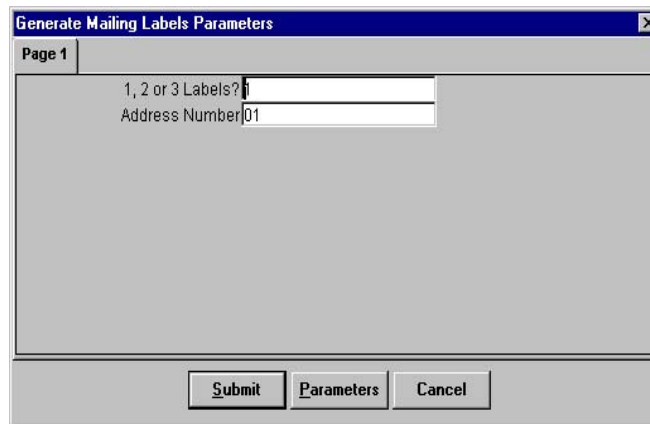
Figure 10-7. Generate Vendor mailing Labels Parameter Window

Enter the number of labels you want generated for each vendor (1, 2, 3, or a whole page) and the address number to be used in the labels (the default is "01"). Then click SUBMIT to submit the process, PARAMETERS to change process submission information, or CANCEL to return to the Vendors list window without submitting the process.

10.3 Generating and Reviewing the Contract Schedule Report

Now that you have awarded the proposal, you can generate the Contract Schedule report which contains the bidder's unit prices and extended amounts for each item. To generate the Contract Schedule report, follow these steps:

1. Select a bid letting from the Bid Lettings list window.

2. Select a proposal from the Letting/Proposals list window.

3. Choose Generate Contract Schedules Report (select Run Process from the File menu).

4. Select the report sections you want Trns•port to produce.

5. Run the process.

6. Review the output.

Click the BIDLETS button to display the Bid Lettings list window. Select a bid letting and click the LETPROP button to display the Letting/Proposals list window. Then select **Run Process** from the right mouse button menu. Trns•port displays a Processes window. Choose **Generate Contract Schedule** and click OK . Trns•port displays the Contract Schedule Options window (see Figure 10-8).

Figure 10-8. Contract Schedule Options Window

Check the boxes next to the report sections you want to produce. Click SUBMIT to run the process. Click OK in the Job Monitor window.

The first section of the report is the contract cover sheet. The second page of the cover sheet contains additional information such as DBE/MBE/WBE goals and site time limitations. Cost Plus Time sites are identified with an asterisk.

The second section is the contract schedule of prices. Trns•port will wrap long item descriptions over several lines as needed.

The DBE Interest report lists contract line items you flagged as likely candidates for DBE participation in the Item list. The report shows the estimated quantity and awarded price for each item. This report is a beginning guide for setting DBE participation goals.

10.4 Generating the Final Detail Estimate Report

The Final Detail Estimate is the same as the Preliminary Estimate discussed elsewhere in this guide, except that now the awarded vendor's prices replace the engineer's estimated prices. The report includes item specifications, estimated item quantities and prices, and low bid prices for alternates.

You can generate the Final Detail Estimate from the Projects, Prime Projects, Proposals and Letting/Proposals list windows.

10.4.1 Generating the Final Detail Estimate Report From the Projects List Window

To generate the report from the Projects list window, click the PROJECTS button to display the Projects list window and follow these steps:

1. Select the projects for which you want to get estimates (hold down CTRL while you select projects with the mouse).

2. Select **Run Process** from the right mouse button menu.

3. Select **Generate Final Detail Estimate** and click OK. Trns•port displays the Detail Cost Estimate Parameters window.

4. Click the PAGE 2 tab and select the level of summarization you want – that is, prime project or proposal – and click OK (see Figure 10-9).
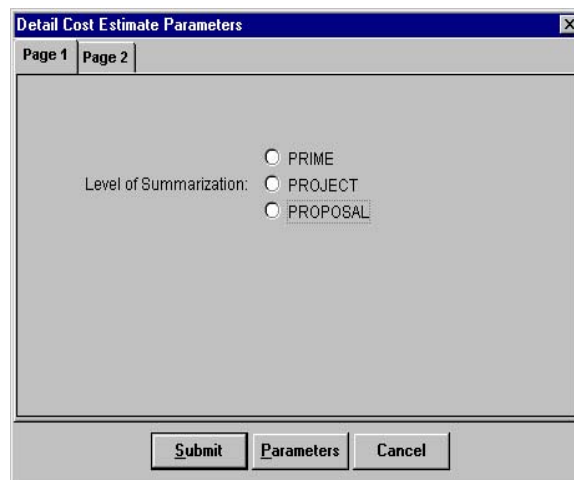
Figure 10-9. Detail Cost estimate Parameters Window

5. Select the report sections you want to produce and the database you want

Trns•port to use by clicking the check boxes. By default, Trns•port produces all the reports and uses the PES database.

6. Click SUBMIT to run the process.

10.4.2 Generating the Final Detail Estimate Report From the Prime Projects List Window

To generate the report from the Prime Projects list window, click the PRIMPROJS button to display the Prime Projects list window and follow these steps:

1. Select the prime projects for which you want to get estimates (hold down CTRL while you select prime projects with the mouse).

2. Select **Run Process** from the right mouse button menu.

3. Select **Generate Final Detail Estimate** and click OK. Trns•port displays the Detail Cost Estimate Parameters window.

4. Select the report sections you want to produce and the database you want Trns•port to use by clicking the check boxes. By default, Trns•port produces all the reports and uses the PES database.

5. Click SUBMIT to run the process (see Figure 10-10).
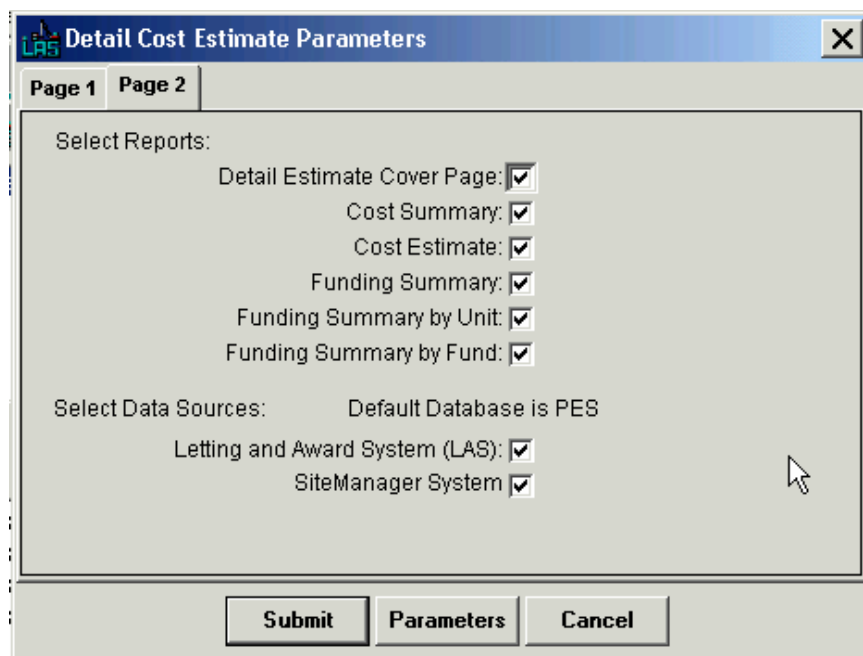
Figure 10-10. Detail Cost Estimate Parameters Window

10.4.3 Generating the Final Detail Estimate Report From the Proposals List Window

To generate the report from the Proposals list window, click the PROPOSALS button to display the Proposals list window and follow these steps:

1. Select the proposals for which you want to get estimates (hold down CTRL while you select proposals with the mouse).

2. Select **Run Process** from the right mouse button menu.

3. Select **Generate Final Detail Estimate** and click OK. Trns•port displays the Detail Cost

Estimate Parameters window.

4. Select the report sections you want to produce and the database you want Trns•port to use by clicking the check boxes. By default, Trns•port produces all the reports and uses the PES database.

5. Click SUBMIT to run the process (see Figure 10-11).
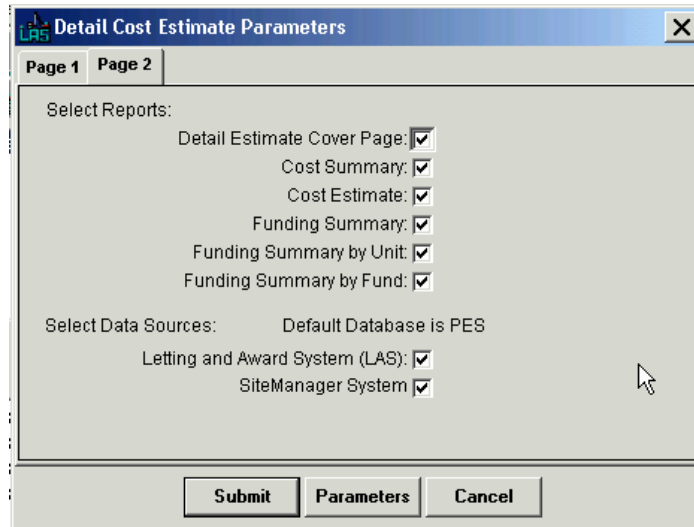
Figure 10-11. Detail Cost Estimate Parameters Window

10.4.4 Generating the Final Detail Estimate Report From the Letting/Proposals List Window

To generate the report from the Letting/Proposals list window, click the BIDLETS button to display the Bid Lettings list window. Select a bid letting and then click the LETPROP button to display the Letting/Proposals list window and follow these steps:

1. Select the letting proposals for which you want to get estimates (hold down CTRL while you select letting proposals with the mouse).

2. Select **Run Process** from the right mouse button menu.

3. Select **Generate Final Detail Estimate** and click OK. Trns•port displays the Detail Cost Estimate Parameters window (see Figure 10-12).
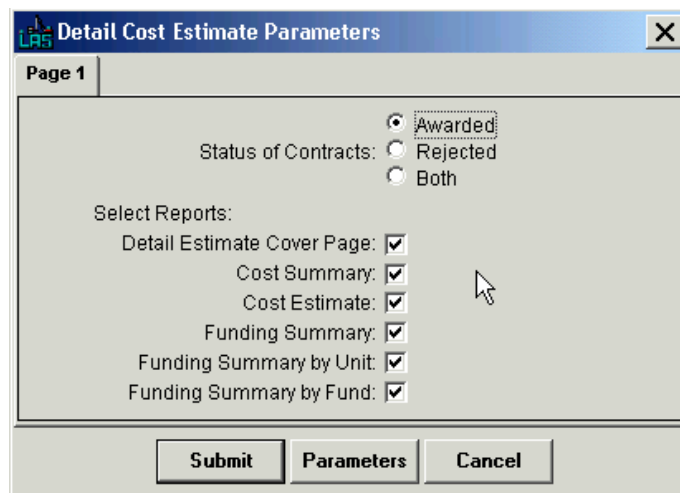
Figure 10-12. Detail Cost Estimate Parameters Window

1. Select the status of the contracts by clicking in the Awarded, Rejected, or Both check boxes.

2. Select the report sections you want to produce by clicking in the check boxes. By default, Trns•port produces all the reports.

3. Click SUBMIT to run the process.

10.4.5 Final Detail Estimate Report

The Final Detail Estimate report lists the funding sources for the project and its actual cost according to values submitted by the low bidder.

Project Summary Log	The log contains basic information about the selected projects, depending on which summary level you selected.
Estimate Cover Page	The cover page shows header information for the project in the estimate.
Cost Summary	This report shows how much of each project each fund will pay for.
Cost Estimate	The header portion of this report displays information about the project. The next section shows information about the first category, including funding sources. The report lists item details next. The report uses the long description. The report shows the total cost of each category after the last item. After the last category, Trns•port displays the project total.
Funding Summary	This report indicates the source of funds for each category.
Funding Summary by Unit	This report combines projects and categories into common units by the Unit Number field in the category record. For example, if categories of work are being performed in a single county, you could give these categories the same unit number. This report would then let you know how much of the project funding is going into each county.

Category Funding Summary by Fund	This report lists each fund in the estimate with the amount allocated from each category in the project.

10.5 Reviewing the Exception Report

Trns•port prints Exception reports after you generate the Final Detail Estimate.

The first page indicates if there were errors. The second page indicates if there were errors with the specified funding. If there were data problems, such as fund participation not adding up to 100 percent, the report would list those problems in this report.

When the Final Detail Estimate is complete and the estimated figures are satisfactory, you can move the Trns•port LAS data to Trns•port SiteManager Construction.

10.6 Deleting Bid Letting Packages

You can delete a bid letting package, or calls or proposals associated with a bid letting package, from Trns•port PES or Trns•port LAS at any time. **After you pass a proposal to Trns•port LAS and initialize it, you will no longer be able to delete the bid letting in Trns•port PES. You will have to delete the bid letting package in Trns•port LAS if any proposal associated with the bid letting package has been passed to Trns•port LAS.**

To delete a bid letting package, select the bid letting you want to delete in the Bid Lettings list window. Then choose **Run Process** from the **File** menu. Trns•port displays a Processes window.

Select **Delete Bid Letting Package** and click OK to continue the delete process. Click CANCEL to return to the Bid Lettings list window without deleting. If you click OK, Trns•port displays a Delete window.

You can delete information on three levels: delete, power delete, and strong delete.

> **Note**: If you have security to run only two of these deletes, only those two deletes will appear in the delete window. If you have security for one of these deletes, this window will not appear.

If you choose **Delete**, you will delete the association of all the letting proposals in the bid letting package and all related bid information (bidders, bid tabs, bid time, planholders and other letting-level data).

If you choose **Power Delete**, you will also delete all proposal-level information for the proposals in the selected letting (that is, the letting call, proposal description, proposal sites and other proposal-level data).

If you choose **Strong Delete**, you will also delete all project, category, funding, and item information for the projects assigned to the proposals for the selected letting.

> **Note**: You should not use Strong Delete until after you award the proposal and pass the data to Trns•port SiteManager Construction and Trns•port BAMS/DSS.

After you select the level of delete, click OK to continue the delete process. Trns•port display a series of Delete Warning windows. Click YES to continue the delete process or NO to return to the Bid Lettings list window without deleting.

11.0 Managing Vendors (Procurement)

You can add and update information about contractors, subcontractors, surety companies, insurance agents, escrow agents, major suppliers, and DBE suppliers in Trns•port LAS. You might also want to treat counties or municipalities as vendors to manage work they perform themselves and to treat utility companies as subcontractors.

11.1 Adding Vendors

You must add each vendor who wants to purchase plans, submit bids, subcontract, be a supplier, or be a service provider to the Trns•port master vendor file. You can add vendors through the Vendor Tabbed Folder Add window or the Add Vendor window.

11.1.1 Adding a Vendor Through the Tabbed Folder Window

To add a vendor, click on the VENDORS button on the Trns•port LAS button bar to display the Vendors list window (see Figure 11-1).

Figure 11-1. Vendors List Window

Select any vendor in the list and choose **Tabbed Folder Add** from the right mouse button menu. Trns•port displays the GENERAL tab of the Add Vendor tabbed folder window (see Figure 11-2).
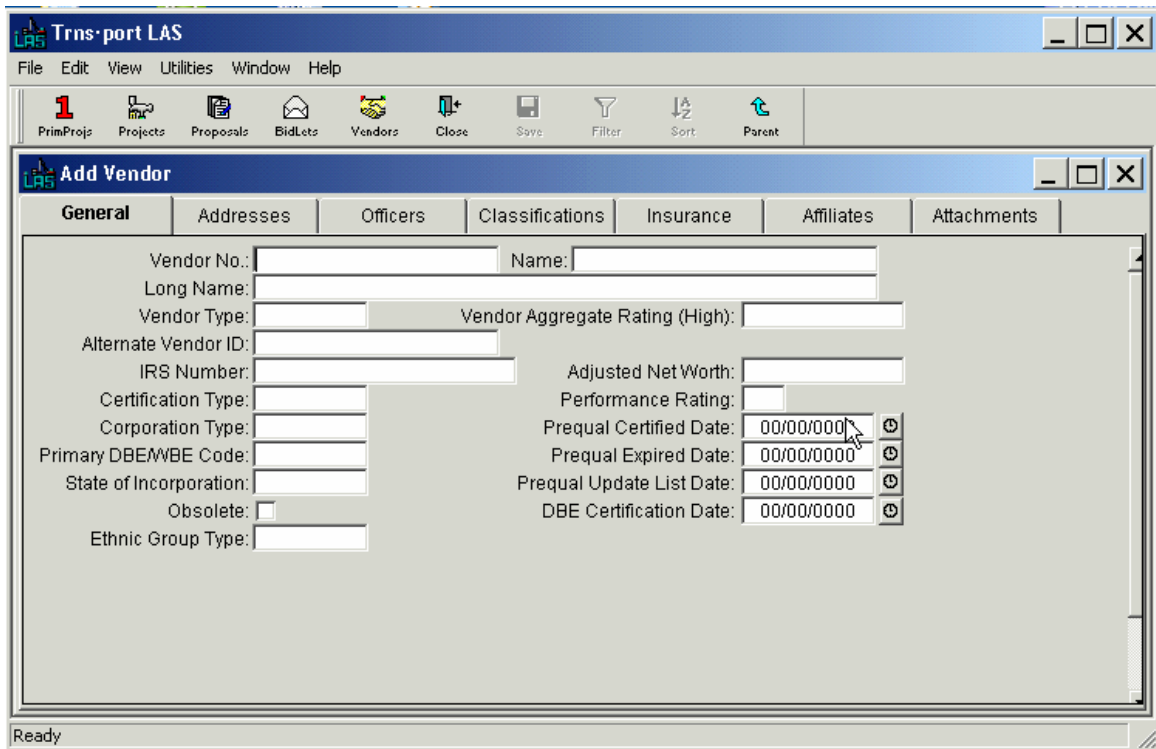
Figure 11-2. General Tab of the Vendor Tabbed Folder Window

The GENERAL tab contains general information fields used for identifying the vendor. To create a complete record you must enter information in these fields:

Long Name   The vendor name (long description).

Name   The vendor name (short description).

Vendor No.   A unique identifier for a vendor.

Vendor Type   A value, which must be selected from the attached VENDTYP code table, which indicates the type of vendor.

You are not required to, but you can enter information in these fields to record additional information about a vendor:

Ability Factor   The state's numerical rating of the vendor's capability to perform work. It is a factor in calculating the vendor's capacity; it is not a performance evaluation.

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

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

Alternate Vendor No.	An alternate identification number or code for a vendor.
Certification Type	A value, which must be selected from the attached CERTYPE code table that indicates the type of work a vendor is authorized to perform.
Corporation Type	A value, which must be selected from the attached CORPTYP code table, which indicates the type of business structure used by a vendor.
DBE Certification Date	The date on which the vendor was certified for its business enterprise type.
Ethnic Group Type	The ethnic group code to which the Vendor belongs.
IRS Number	The Federal Employer Identification (FEI) number assigned to the vendor by the IRS.
Maximum Capacity	The maximum amount of work, in dollars, that a vendor can perform.
Obsolete	Indicates that a vendor is obsolete and therefore should no longer be used.
Prequal Certified Date	The date the vendor became qualified to perform the type of work certified for the state.
Prequal Expired Date	The date the vendor's qualification for certification for work expires.
Prequal Update	The date you schedule to review the list of vendors who have pre-List Date qualified.
Primary DBE/WBE Code	A coded value indicating the vendor's business enterprise certification type.
State of Incorporation	A coded value indicating the state in which the vendor company is incorporated.
Uncompleted Work	The amount of work, in dollars, a vendor has outstanding.

When you have finished adding information, save the new vendor to the Trns•port database by clicking the SAVE button or selecting **Save** from the **File** menu. Trns•port displays the new vendor in the Vendor list window.

11.1.2 Adding a Vendor Through Tab Windows

To add a new vendor, click the VENDORS button on the button bar. Trns•port displays the Vendors list window. Press INSERT or select **Add** from the right mouse button menu to display the Add Vendor window (see Figure 11-3).
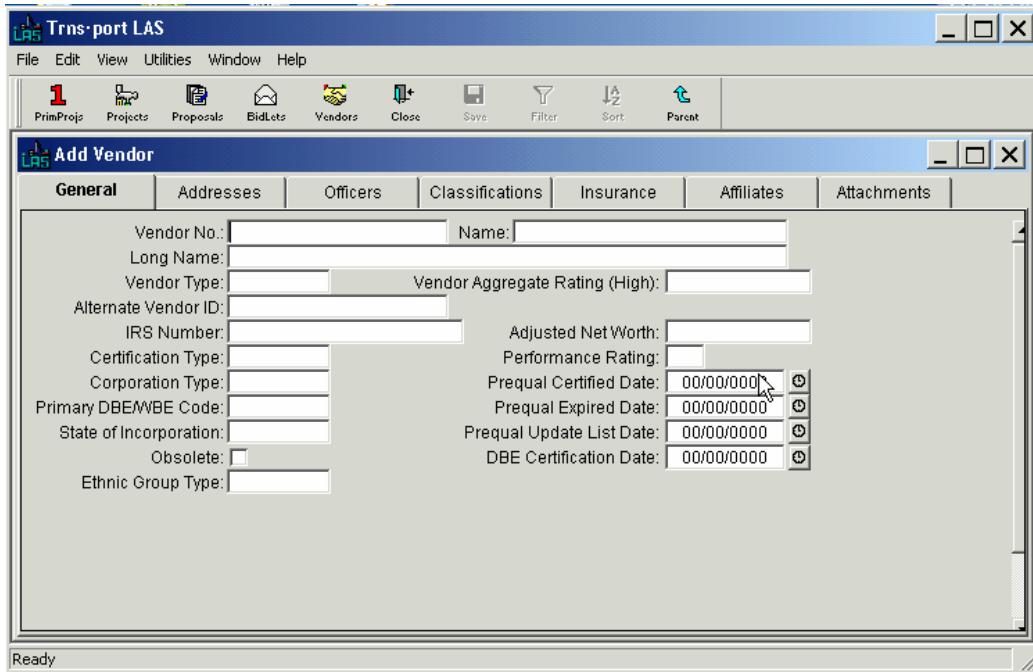
Figure 11-3. Add Vendor Window

To create a complete record you must enter information in the fields listed in Section 11.1.1.

When you finish adding information, click OK to add the vendor or ADD MORE to add another vendor. When you finish adding vendors, Trns•port adds the new vendors to the Vendors list and returns you to the Vendors list window.

11.2 Viewing the Vendor Inquiry Screen

Trns•port has a Vendor Inquiry window that displays vendor classifications, vendor insurance, and vendor officer data on four tabs. This data is for viewing only and cannot be modified. To view the Vendor Inquiry Screen, select a single vendor from the Vendors list window and choose **Vendor Inquiry Screen** from the right mouse button menu or click the INQUIRY button on the button bar. Trns•port displays the first tab of the Vendor Inquiry window (See Figure 11-4).
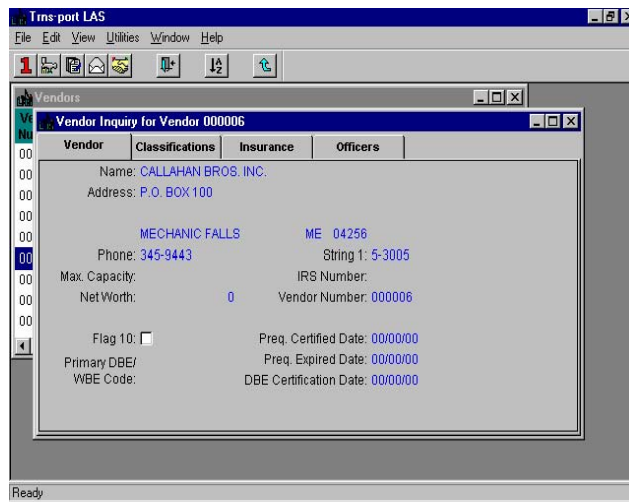
Figure 11-4.Vendor Tab of the Vendor Inquiry Window

You can view the primary address for a vendor and various information pulled from the VENDOR table, but you cannot modify any of the information on these tabs. Click on the tabs at the top of the window to move between tabs in the window.

The CLASSIFICATIONS tab of the Vendor Inquiry window displays information about a vendor's class, class description, and qualification type (see Figure 11-5).
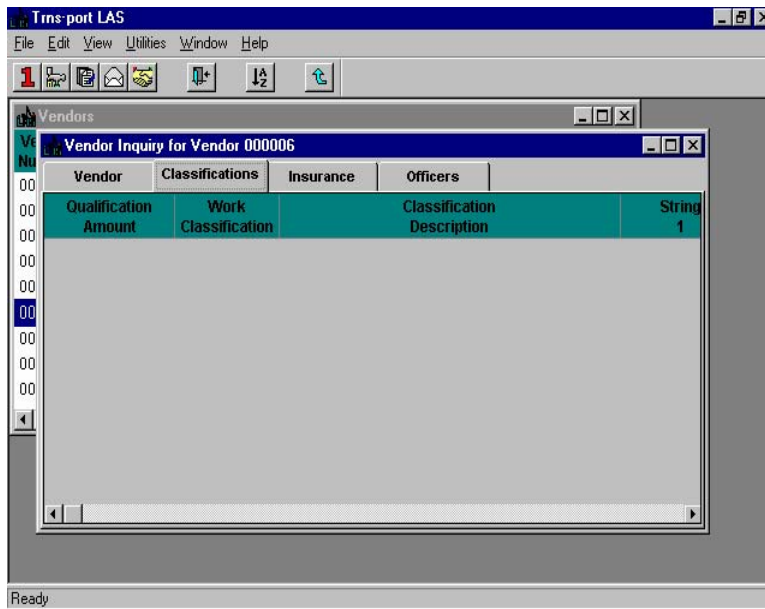
Figure 11-5. Classifications Tab of the Vendor Inquiry Window

The INSURANCE tab of the Vendor Inquiry window displays information about vendor insurance (see Figure 11-6).
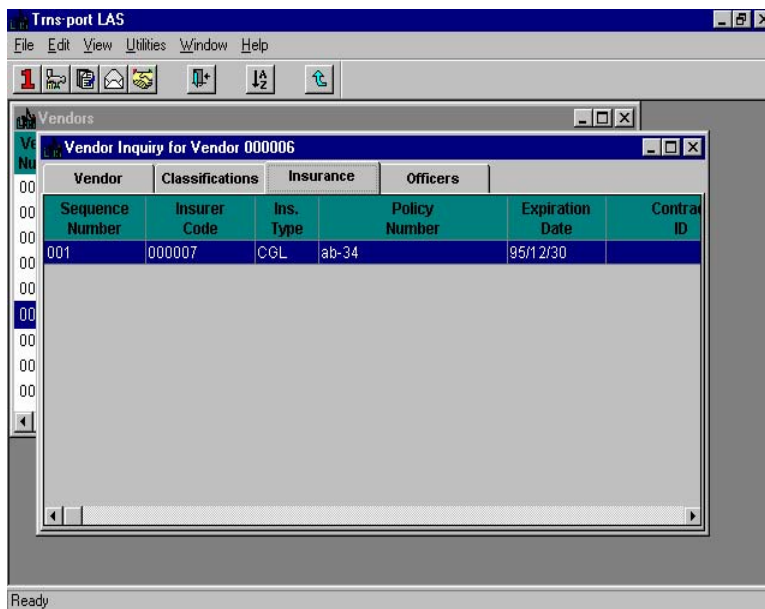
Figure 11-6. Insurance Tab of the Vendor Inquiry Window

The OFFICERS tab of the Vendor Inquiry window displays information about vendor officers (see Figure 11-7).
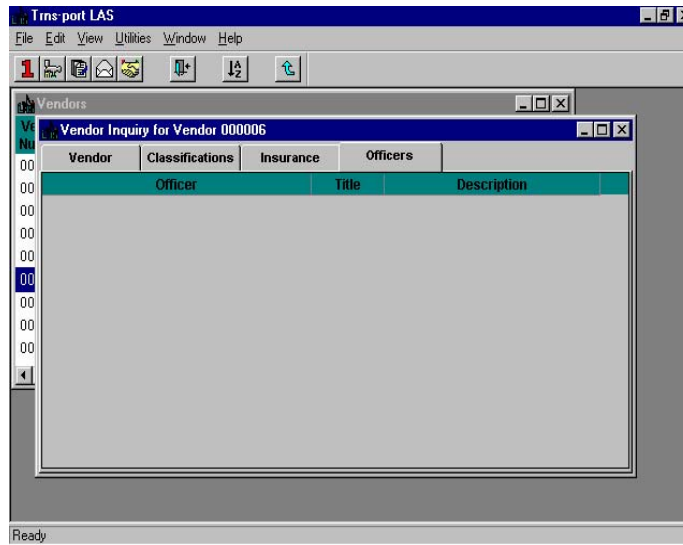
Figure 11-7. Officers Tab of the Vendor Inquiry Window

When you have completed your review of the vendor information, click CLOSE to exit the Vendor Inquiry window and return to the Vendor list window.

11.3 Changing Vendor Information

You can change information about a vendor through the Vendor Tabbed Folder Change window or the Change Vendor window.

11.3.1 Changing Vendor Information Through the Tabbed Folder Window

To change information about a vendor, select the vendor record from the Vendors list window and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Vendor Tabbed Folder window with all known information about the Vendor (see Figure 11-8).
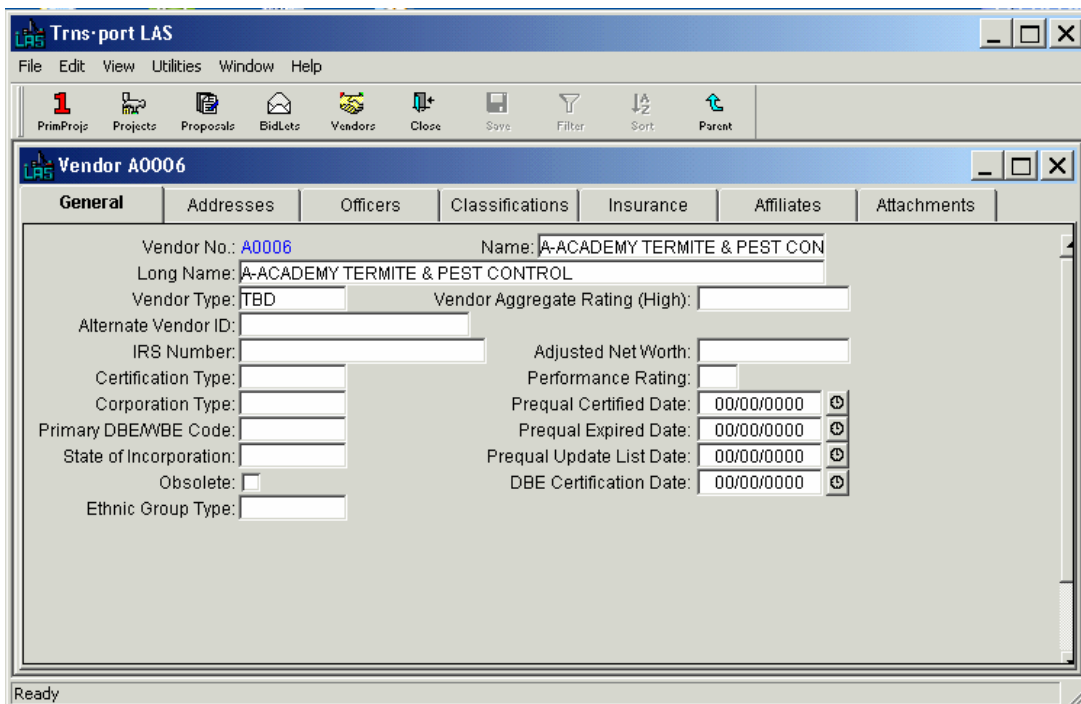
Figure 11-8. General Tab of the Vendor Tabbed Folder Window

You cannot change the Vendor Number, but you can add or change information in the rest of the fields. When you finish adding or changing information, save your changes to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

> 🗎 **Note:** If a vendor is no longer active, do not delete the vendor record because you will lose all the reference information about the vendor. Instead, click the Obsolete check box to set the flag.

11.3.2 Changing Vendor Information Through the Vendor Window

To change information about a vendor, select the vendor record from the Vendors list window and choose **Change** from the right mouse button menu to display the Vendor window (see Figure 11-9).

Figure 11-9. Vendor Window

To create a complete record you must enter information in the fields listed in Section 11.1.1.

You cannot change the Vendor Number, but you can add or change information in the rest of the fields. Click OK to save your changes or CANCEL to return to the Vendors list window.

> 🗎 **Note:** If a vendor is no longer active, do not delete the vendor record because you will lose all the reference information about the vendor. Instead, click the Obsolete check box to set the flag.

11.4 Removing Vendors

To delete vendor records, select the vendor or vendors in the Vendors list window. Then choose **Delete** from the right mouse button menu. Trns•port displays the first of two Delete Warning windows.

Click YES in each window to complete the delete process.

11.5 Managing Vendor Addresses

You can easily keep track of multiple addresses for all vendors bidding on a project.

11.5.1 Adding Vendor Addresses

You can add addresses for a selected vendor through the Vendor Tabbed Folder window or the Vendor Address window.

11.5.2 Adding a Vendor Address Through the Tabbed Folder Window

To add an address to a new vendor record, select the vendor record from the Vendors list window and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Vendor tabbed folder window. Click on the ADDRESSES tab (see Figure 11-10).
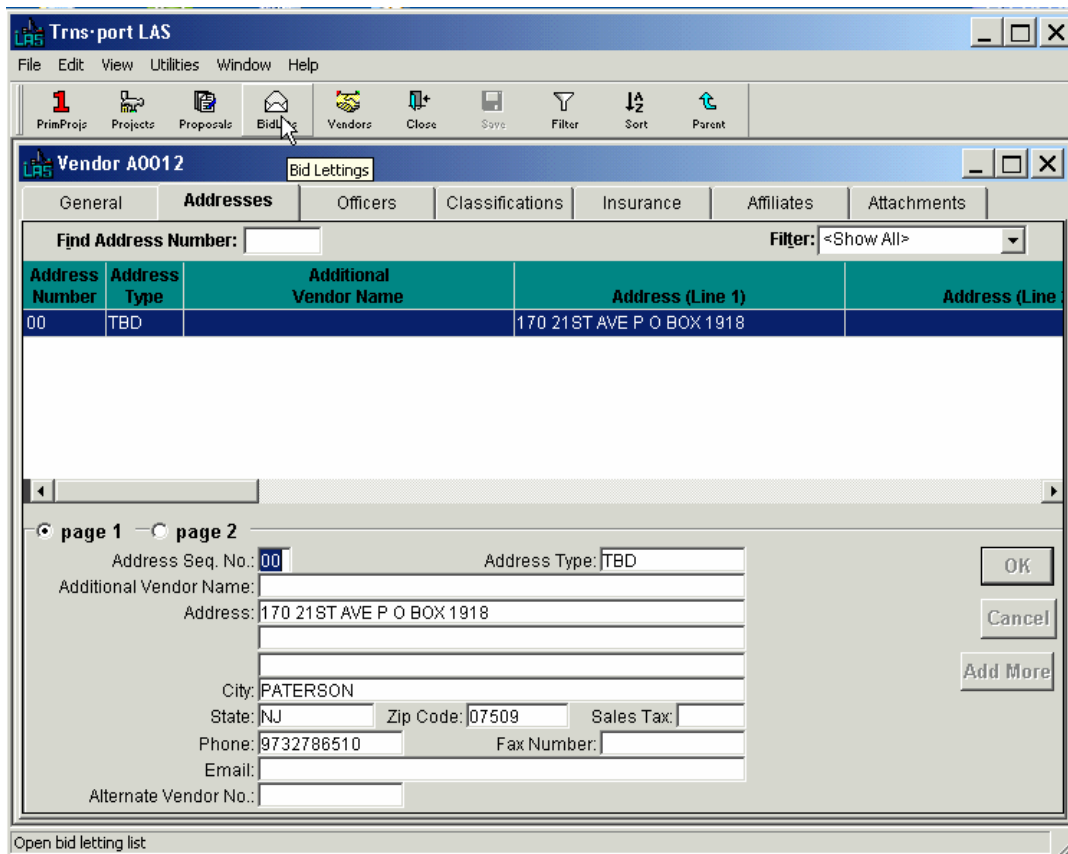
Figure 11-10. Addresses Tab of the Vendor Tabbed Folder Window

The top part of the ADDRESSES tab contains a grid of all the existing addresses for the vendor. The bottom part of the ADDRESSES tab contains address detail information for the address selected in the grid.

To add a new address, click in the address grid and select **Add** from the right mouse button menu. Trns•port adds a blank row to the list of addresses. Enter data into the blank fields displayed in the detail area of the Addresses tab. Click the PAGE 2 option button to enter additional information.

You can also enter address information directly into the grid area of the tab by selecting **Hide Detail** from the right mouse button menu. The detail area of the tab disappears and you can add or edit the information in each cell of the grid.

> 🗒 **Note**: The Addresses tab contains a standard Trns•port filter and a quick find box you can use to search selected single columns of data

To create a complete record you must enter information in these fields:

Address	The vendor's address.
Address Seq. No.	A sequential number used to identify one of multiple addresses for a single vendor.
Address Type	A value, which must be selected from the ADDRTYP code table, that indicate the type of address for the vendor (for example, billing or shipping) when a vendor has multiple addresses.
City	The vendor's city.
State	The vendor's state address.
ZIP Code	The vendor's zip code.

You are not required to, but you can enter information in these fields to record additional information about a vendor's address:

Additional Vendor Name	A field for an additional name of the vendor.
Fax Number	The vendor's fax number.
E-mail	The vendor's e-mail address.
Latitude	The latitude on a map of the vendor's address.
Longitude	The longitude on a map of the vendor's address.
Phone	The vendor's phone number.
Sales Tax Code	A coded value indicating the sales tax that applies to the vendor.

If you need to add a second address for the same vendor, click ADD MORE and enter another record for the vendor with a different address sequence number. You can keep track of a different vendor number by putting it in the Alternate Vendor Number field.

Click OK when you have finished adding address information or click CANCEL to return to the Addresses grid window without saving the new address record. Before leaving the tabbed folder window you must save the new address record to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

11.5.3 Adding Vendor Addresses Through the Vendor Address Window

To add addresses to new vendor records, select the vendor record from the Vendors list window and click the ADDRESS button to display the Addresses list window (see Figure 11-11).
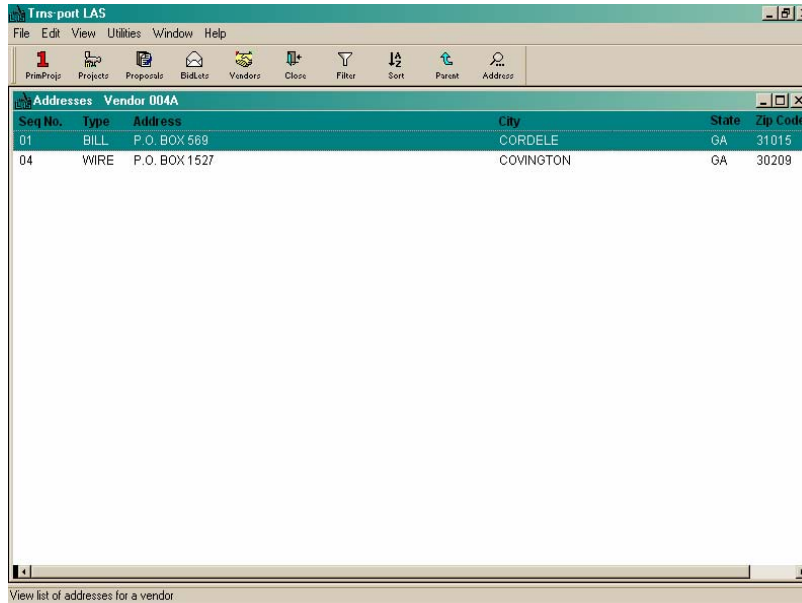
Figure 11-11. Addresses List Window

Press INSERT or choose **Add** from the right mouse button menu to add an address for the selected vendor. Trns•port displays the Add Vendor Address window (see Figure 11-12).

Figure 11-12. Add Vendor Address Window

To create a complete record you must enter information in the fields listed in the previous section.

If you need to add a second address for the same vendor, click ADD MORE and enter another record for the vendor with a different address sequence number. You can keep

track of a different vendor number by putting it in the Alternate Vendor Number field.

To save your changes and return to the Addresses list window, click OK. If you click CANCEL, Trns•port will not add the address. Click the CLOSE button on the button bar to close the Add Vendor Address window and return to the Vendors list window.

11.5.4 Changing a Vendor Address

You can change a vendor's address through the tabbed folder window or through the Vendor Address window.

11.5.5 Changing a Vendor Address Through the Tabbed Folder Window

To change a vendor's address, select the address you want to change on the ADDRESS tab of the Vendor tabbed folder window. Trns•port displays all the existing information about the selected address in the detail area of the Addresses tab.

You can change or update any fields on the tab. To change information, click in a text box and add or delete information. Click OK when you finish making changes or CANCEL to return to the Addresses grid without saving your changes.

11.5.6 Changing a Vendor Address Through the Vendor Address Window

To change vendor addresses, select the vendor record from the Vendors list window and click the ADDRESS button to display the Addresses list window.

Choose **Change** from the right mouse button menu to change an address for the selected vendor. Trns•port displays the Vendor Address window.

You can change or update any fields except the Address Sequence Number field. Click OK when you finish making changes or CANCEL to return to the Addresses list window without saving your changes.

11.5.7 Deleting a Vendor Address

You can delete a vendor's address through the tabbed folder window or through the Vendor Address window.

11.5.8 Deleting a Vendor Address Through the Tabbed Folder Window

To delete a vendor address, select the address you want to delete from the list on the ADDRESS tab of the Vendor tabbed folder window and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window. Click YES in the window to complete the delete process.

11.5.9 Deleting a Vendor Address Through the Vendor Address Window

To delete a vendor address, select the vendor in the Vendors list window and click the ADDRESS button to display the Addresses list window. Select the address you want to delete and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window. Click YES in the window to complete the delete process.

11.6 Managing Officer Information for a Vendor

Officers are persons who are authorized to sign for a contractor or hold some office in the vendor's company. You can add, change, or delete vendor officer information.

11.6.1 Adding Officer Information

You can add officer information for a vendor through the Vendor tabbed folder window or the Vendor Officers list window.

11.6.2 Adding Officer Information Through the Tabbed Folder Window

To add officer information for a vendor, select the vendor record from the Vendors list
window and choose **Tabbed Folder Change** from the right mouse button menu.
Trns•port displays the Vendor tabbed folder window. Click the OFFICERS tab (see Figure
11-13).

Figure 11-13. Officers Tab of the Vendor Tabbed Folder Window

The top part of the OFFICERS tab contains a grid of all the existing officers for the vendor.
The bottom part of the OFFICERS tab contains officer detail information for the officer
selected in the grid.

To add a new officer, click in the officers grid and select **Add** from the right mouse
button menu. Trns•port adds a blank row to the list of officers. Enter data into the
blank fields displayed in the detail area of the Officers tab.

You can also enter officer information directly into the grid area of the tab by selecting
Hide Detail from the right mouse button menu. The detail area of the tab disappears
and you can add or edit the information in each cell of the grid.

> 📄 **Note:** The OFFICERS tab contains a standard Trns•port filter and a quick find box
> you can use to search selected single columns of data.

To create a complete record you must enter information in this field:

Vendor Officer	The name of an officer for a vendor.

You are not required to, but you can enter information in these fields to record additional
information about a vendor's officers:

Address Seq. No.	A sequential number used to identify one of multiple addresses for a single vendor that corresponds to the vendor officer's address.

Address Type	A value, which must be selected from the ADDRTYP code table, that indicate the type of address for the vendor (for example, billing or shipping) when a vendor has multiple addresses.
Officer's Address Number	The vendor address sequence number identifying the vendor officer's address.
Social Security Number	The social security number of the vendor officer.
Title of Officer	The title of a vendor officer.

Click OK when you have finished adding officer information or click CANCEL to return to the Officers grid without saving the new officer record. Before leaving the tabbed folder window you must save the new officer record to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

11.6.3 Adding Officer Information Through the Officers List Window

To add officer data for a vendor, select a vendor from the Vendors list window and click the OFFICERS button to display the Officers list window (see Figure 11-14).
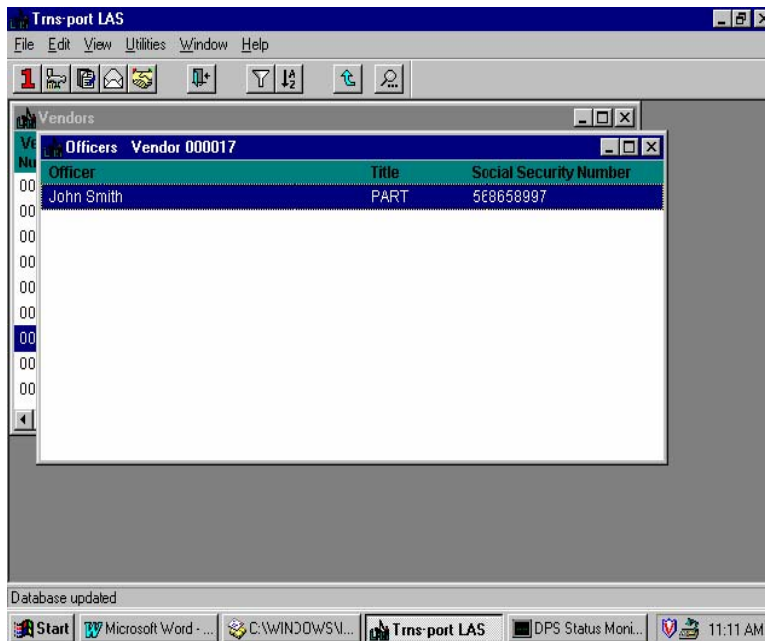
Figure 11-14. Officers List Window

You can add values by pressing INSERT or choosing **Add** from the right mouse button menu. Trns•port displays the Add Officer window (see Figure 11-15).
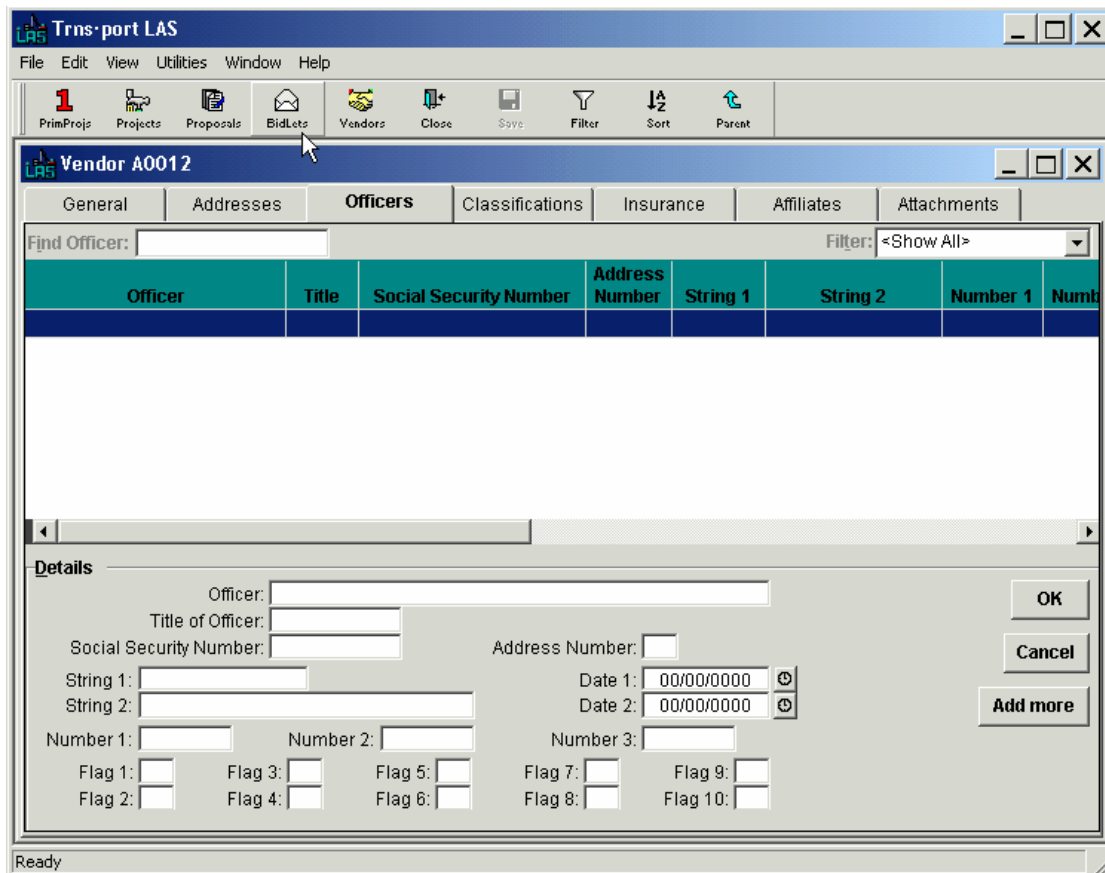
Figure 11-15. Add Officer Window

To create a complete record you must enter information in the fields listed in the previous section.

Click OK to add the officer information and return to the Officers list window or click ADD MORE to add another officer. Click the CLOSE button on the button bar to close the Officers list window and return to the Vendors list window.

11.6.4 Changing Officer Information

You can change information about a vendor's officers through the tabbed folder window or through the Vendor Address window.

11.6.5 Changing Officer Information Through the Tabbed Folder Window

To change information about a vendor's officer, select the record you want to change on the OFFICERS tab of the Vendor tabbed folder window. Trns•port displays all the existing information about the selected officer in the detail area of the Officers tab.

You can change or update any fields on the tab. To change information, click in a text box and add or delete information. Click OK when you finish making changes or CANCEL to return to the Officers grid without saving your changes.

11.6.6 Changing Officer Information Through the Vendor Address Window

To change information about a vendor officer, select the record you want to change in the Officers list window. Then choose **Change** from the right mouse button menu. Trns•port displays a Vendor Officer window.

You can add or change information in any fields except Vendor Officer. When you finish

making changes, click OK to save your changes or CANCEL to return to the Vendor list window without saving.

11.6.7 Deleting Officer Information

You can delete officer information through the tabbed folder window or through the Officer list window.

11.6.8 Deleting Officer Information Through the Tabbed Folder Window

To delete an officer, select the officer you want to delete from the list on the OFFICERS tab of the Vendor tabbed folder window and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window. Click YES in the window to complete the delete process.

11.6.9 Deleting Officer Information Through the Officer Window

To delete vendor officer records, select the record or records in the Officers list window and choose **Delete** from the right mouse button menu. Trns•port displays a delete warning window.

Click YES in each window to complete the delete process.

11.7 Managing Vendor Work Classifications

Work classifications include all the types of work a vendor is allowed to perform. This could include pre-qualifications, certifications, and all types of work for services and supplies.

11.7.1 Adding a Vendor Work Classification

You can add work classification information for a selected vendor through the Vendor Tabbed Folder window or the Vendor Work Classifications list window.

11.7.2 Adding a Vendor Work Classification Through the Tabbed Folder Window

To add a work classification to a vendor record, select the vendor record from the Vendors list window and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Vendor tabbed folder window. Click .the CLASSIFICATIONS tab (see Figure 11-16).
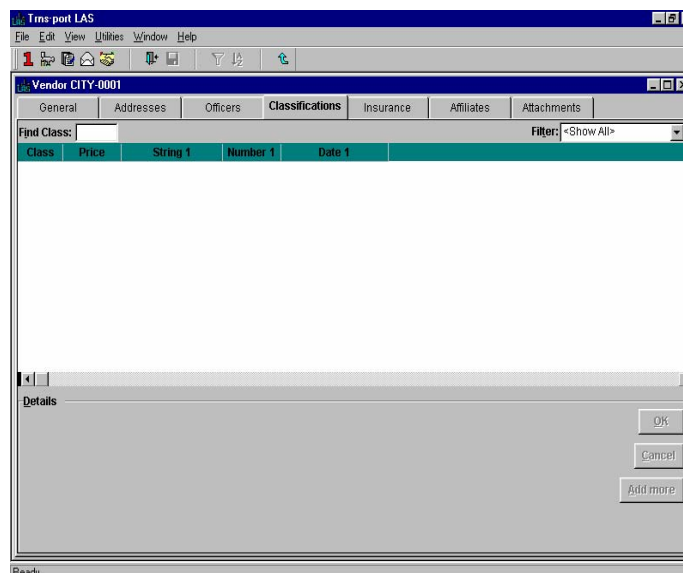
Figure 11-16. Classifications Tab of the Vendor Folder Window

The top part of the CLASSIFICATIONS tab contains a grid of all the existing classifications for the vendor. The bottom part of the CLASSIFICATIONS tab contains address detail information for the classification selected in the grid.

To add a new classification, click in the classification grid and select **Add** from the right mouse button menu. Trns•port adds a blank row to the list of classifications. Enter data into the blank fields displayed in the detail area of the Classifications tab.

You can also enter work classification information directly into the grid area of the tab by selecting **Hide Detail** from the right mouse button menu. The detail area of the tab disappears and you can add or edit the information in each cell of the grid.

> 🗎 **Note:** The CLASSIFICATIONS tab contains a standard Trns•port filter and a quick find box you can use to search selected single columns of data.

To create a complete record you must enter information in these fields:

Work Classification	A value, which must be selected from the attached VWRKCLS code table, which identifies the classification of work the vendor is qualified to perform.
Qualification Amount (For This Class)	The total dollar value of contracts for which the vendor is qualified to work. Defaults to zero.

Click OK when you have finished adding classification information or click CANCEL to return to the Classifications grid without saving the new classification record. Before leaving the tabbed folder window you must save the new classification record to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

11.7.3 Adding a Vendor Work Classification Through the Work Classifications Window

To add a vendor work classification, select the vendor in the Vendors list window and click the WORKCLASS button. Trns•port displays a Work Classifications list window (see Figure 11-17).
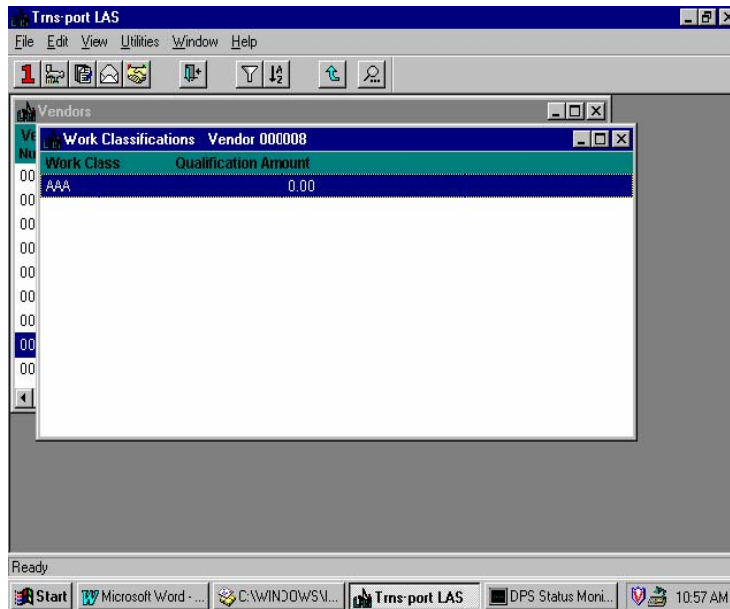
Figure 11-17. Work Classifications List Window

Press INSERT or choose **Add** from the right mouse button menu to display the Add Work Classification window (see Figure 11-18).
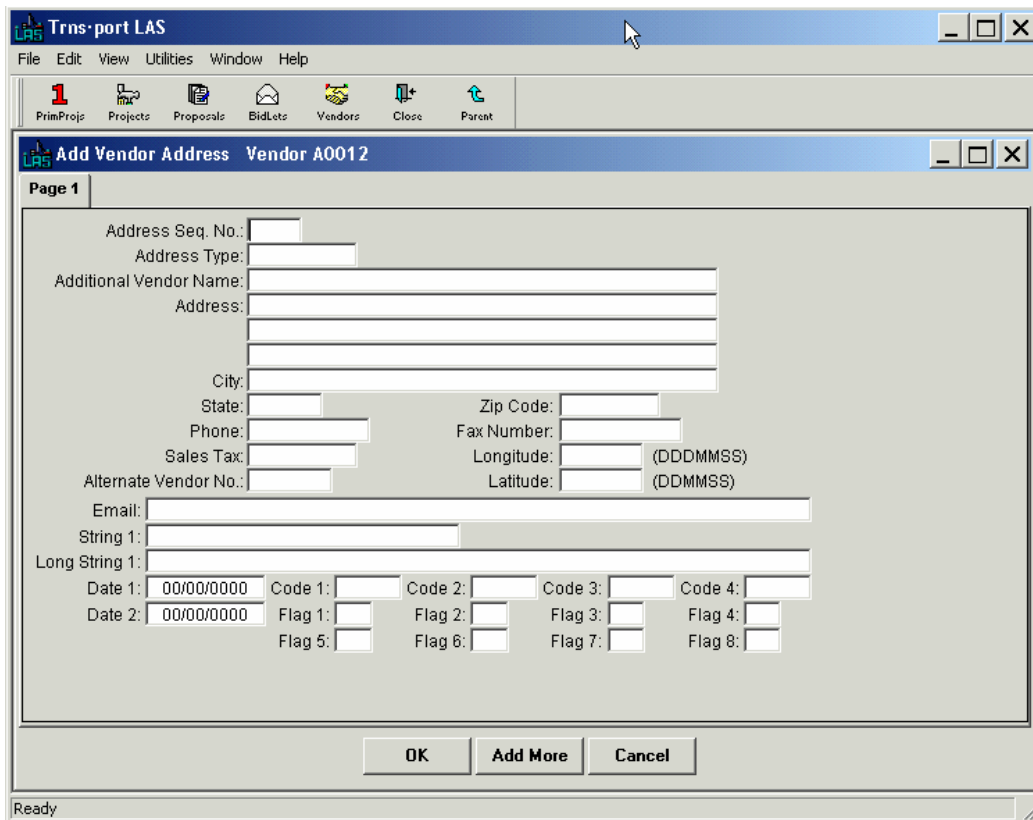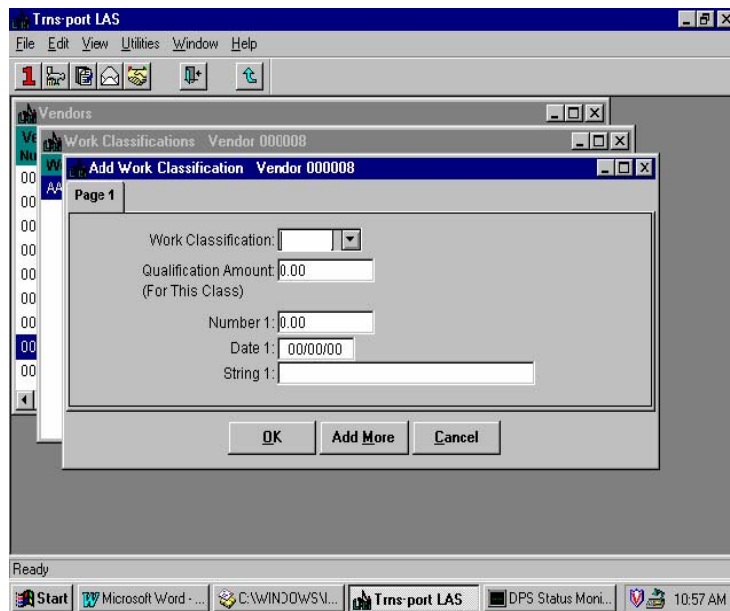

Figure 11-18. Add Work Classification Window

To create a complete record you must enter information in the fields listed in the previous section.

If you want to add more than one work classification for this vendor, click ADD MORE. When you finish adding a work classification for this vendor, click OK to return to the Work Classifications list window. Click the CLOSE button on the button bar to close the Add Work Classification window and return to the Vendors list window.

11.7.4 Changing a Vendor Work Classification

You can change a vendor's work classifications through the tabbed folder window or through the Vendor Work Classifications window.

11.7.5 Changing a Work Classification Through the Tabbed Folder Window

To change a work classification, select the classification you want to change on the CLASSIFICATIONS tab of the Vendor tabbed folder window. Trns•port displays all the existing information about the selected classification in the detail area of the Classifications tab.

You can change or update any fields on the tab. To change information, click in a text box and add or delete information. Click OK when you finish making changes or CANCEL to return to the Classifications grid without saving your changes.

11.7.6 Changing a Work Classification Through the Work Classifications Window

To change a vendor work classification, select the work classification from the Work Classifications list window. Choose **Change** from the right mouse button menu to display the Work Classification window.

You can add and change information in any fields except the Work Classification field. When you finish updating a work classification for the selected vendor, click OK to return to the Work Classifications list window. Click CANCEL to return to the Work Classifications list window without saving.

11.7.7 Deleting a Vendor Work Classification

You can delete a vendor's work classification through the tabbed folder window or through the Work Classifications window.

11.7.8 Deleting a Work Classification Through the Tabbed Folder Window

To delete a work classification, select the classification you want to delete from the list on the CLASSIFICATIONS tab of the Vendor tabbed folder window and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window. Click YES in the window to complete the delete process.

11.7.9 Deleting a Work Classification Through the Vendor Address Window

To delete vendor work classifications, select the records you want to delete in the Work Classifications list window. Then select **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window. Click YES in each window to complete the delete process.

11.8 Managing Vendor Insurance

LAS allows you to store insurance policy data required for all contractors bidding on a proposal, as well as specific policies required for contract award. You can add, change or delete insurance information for a vendor.

11.8.1 Adding Vendor Insurance Information

You can add a vendor's insurance information through the Vendor Tabbed Folder window or the Vendor Insurance Data list window

11.8.2 Adding Insurance Information Through the Tabbed Folder Window

To add vendor insurance information, select the vendor record from the Vendors list window and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Vendor tabbed folder window. Click the INSURANCE tab (see Figure 11-19).
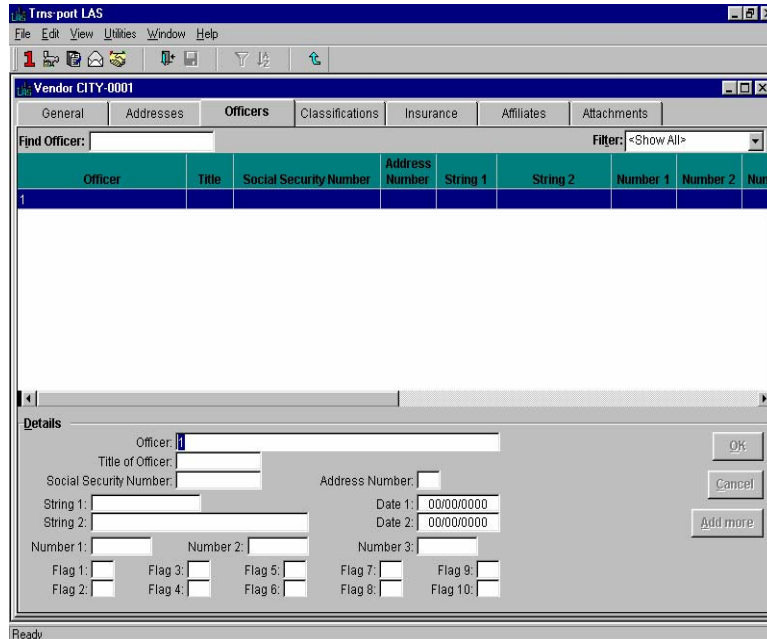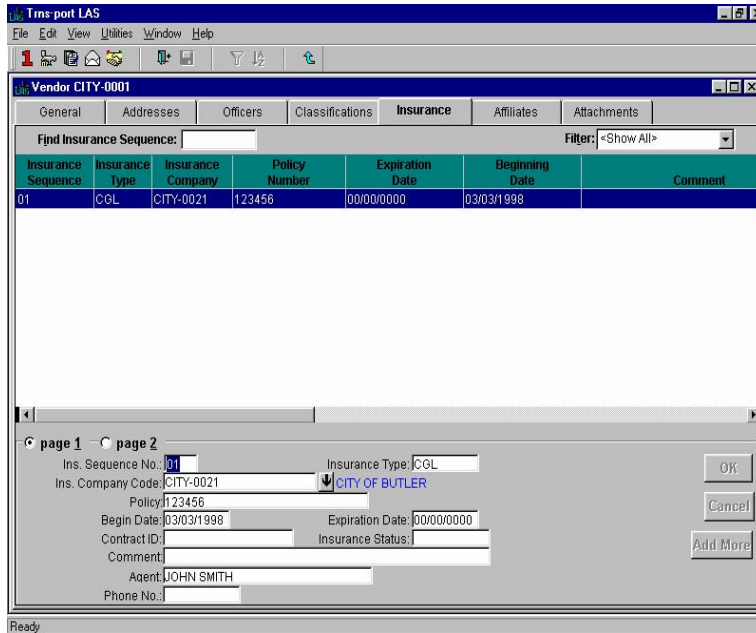
Figure 11-19. Insurance Tab of the Vendor Tabbed Folder Window

The top part of the INSURANCE tab contains a grid of all the existing insurance records for the vendor. The bottom part of the INSURANCE tab contains insurance detail information for the insurance record selected in the grid.

To add a new insurance record, click in the insurance grid and select **Add** from the right mouse button menu. Trns•port adds a blank row to the list of insurance records. Enter data into the blank fields displayed in the detail area of the Insurance tab. Click the PAGE 2 option button to enter additional information.

You can also enter insurance information directly into the grid area of the tab by selecting **Hide Detail** from the right mouse button menu. The detail area of the tab disappears and you can add or edit the information in each cell of the grid.

> 📄 **Note:** The INSURANCE tab contains a standard Trns•port filter and a quick find box you can use to search selected single columns of data

To create a complete record you must enter information in these fields:

Ins. Sequence No.	A sequential number used to identify one of multiple insurance policies for a single vendor.
Insurance Type	A value, which must be selected from the attached INSTYPE code table, that identifies the type of insurance policy; for example, general liability, umbrella, worker's compensation.

You are not required to, but you can enter information in these fields to record additional information about a vendor's insurance:

Agent	Agent who sold the contractor the insurance policy.
Begin Date	Date insurance policy takes effect

Comment	Space for additional information about the insurance policy.
Company Code	The vendor number of the insurance company underwriting the insurance policy.
Contract ID	A unique identifier for a proposal or contract.
Expiration Date	The date on which the vendor's work certification or insurance policy expires.
Insurance Status	A value, which must be selected from the attached INSSTAT code table, that indicates whether insurance is active, a binder, canceled or expired.
Phone Number	Phone number for agent or insurance company.
Policy No.	Policy number for the contractor's insurance policies.

Click OK when you have finished adding insurance information or click CANCEL to return to the Insurance grid without saving the new insurance record. Before leaving the tabbed folder window you must save the new insurance record to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

11.8.3 Adding Vendor Insurance Information Through the Vendor Insurance Window

To add vendor insurance, select the vendor from the Vendors list window. Then click the INSURE button to display the Insurance Data list window (see Figure 11-20).
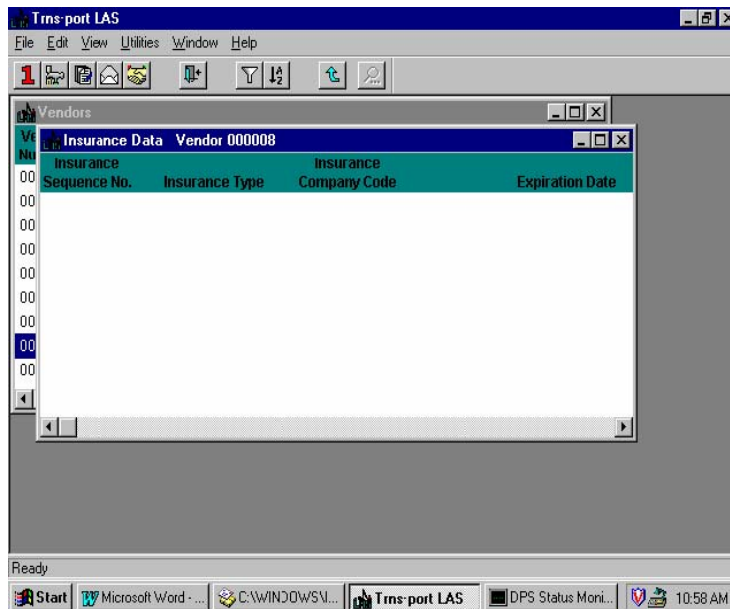
Figure 11-20. Insurance Data List Window

Choose **Add** from the right mouse button menu. Trns•port displays the Add Vendor Insurance window (see Figure 11-21).

Figure 11-21. Add Vendor Insurance Window

To create a complete record you must enter information in the fields listed in the previous section.

Click OK to save the new insurance information, ADD MORE to add another insurance record for the same vendor, or CANCEL to return to the Insurance list window without adding a record.

11.8.4 Changing Vendor Insurance

You can change a vendor's insurance record through the tabbed folder window or through the Vendor Insurance window.

11.8.5 Changing Insurance Information Through the Tabbed Folder Window

To change a vendor's insurance, select the insurance record you want to change on the INSURANCE tab of the Vendor tabbed folder window. Trns•port displays all the existing information about the selected insurance in the detail area of the Insurance tab.

You can change or update any fields on the tab. To change information, click in a text box and add or delete information. To change the Ins. Company Code field, click the down arrow to the right of the text box. Trns•port displays the Vendor list window. Select the new vendor from the Vendor list window and click OK. Trns•port enters the new company code in the field.

Click OK when you finish making changes or CANCEL to return to the Insurance grid without saving your changes.

11.8.6 Changing Insurance Information Through the Vendor Insurance Window

To change vendor insurance, select the insurance record in the Insurance Data list window and choose **Change** from the right mouse button menu. Trns•port displays a Vendor Insurance window.

You can add information to or change any fields except the Insurance Sequence Number field. When you finish making changes, click OK to save your changes or click CANCEL to return to the Insurance Data list window without saving.

11.8.7 Deleting Vendor Insurance

You can delete a vendor insurance record through the tabbed folder window or through the Vendor Insurance window.

11.8.8 Deleting a Vendor Insurance Record Through the Tabbed Folder Window

To delete a vendor insurance record, select the record you want to delete from the list on the INSURANCE tab of the Vendor tabbed folder window and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window. Click YES in the window to complete the delete process.

11.8.9 Deleting a Vendor Insurance Record Through the Vendor Address Window

To delete vendor insurance, select the insurance record in the Insurance Data list window and choose **Delete** from the right mouse button menu. Trns•port displays two delete windows. Click YES in each window to complete the delete process.

11.8.10 Listing Vendor Insurance

You can generate a listing of a vendor's insurance data that includes an Insurance Expiration Letter and an Insurance Updates report. To produce this listing, select **Run Process** from the **File** menu and choose **List Vendor Insurance Data** from the Processes window. Trns•port displays a Confirm Process Submission window.

Click SUBMIT to submit the process, PARAMETERS to change process submission information, or CANCEL to return to the Vendors list window without submitting the process.

11.9 Managing Vendor Affiliate Information

Affiliates are two vendors who have an on-going legal relationship. Affiliates can be parent and subsidiary or substantial owners of each other's stock. Trns•port does not consider two vendors who engage in a single joint venture affiliates.

11.9.1 Adding a Vendor Affiliate

You can add affiliate information for a selected vendor through the Vendor Tabbed Folder window or the Vendor Affiliations List window.

11.9.2 Adding an Affiliate Through the Tabbed Folder Window

To add an affiliate to a vendor, select the vendor record from the Vendors list window and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Vendor tabbed folder window. Click the AFFILIATES tab (see Figure 11-22).
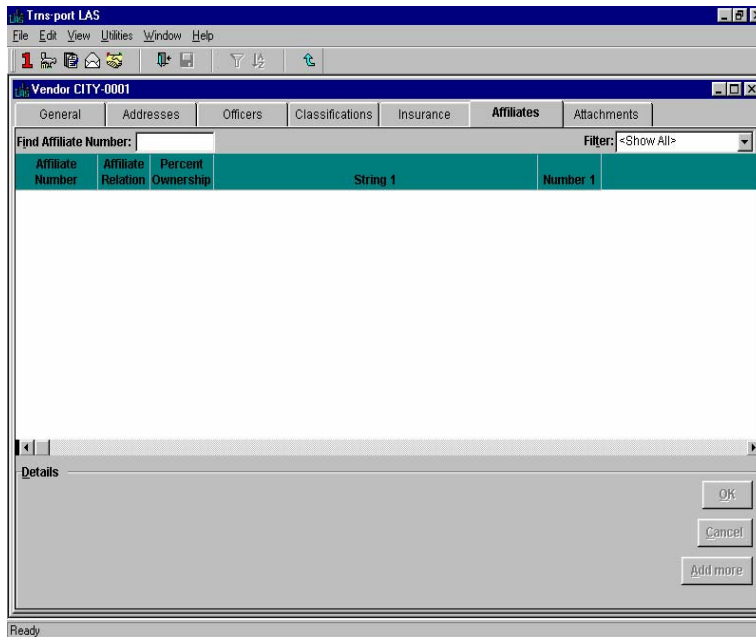
Figure 11-22. Affiliates Tab of the Vendor Tabbed Folder Window

The top part of the AFFILIATES tab contains a grid of all the existing affiliates for the vendor. The bottom part of the AFFILIATES tab contains detail information for the affiliate selected in the grid.

To add a new affiliate, click in the Affiliates grid and select **Add** from the right mouse button menu. Trns•port adds a blank row to the list of affiliates. Enter data into the blank fields displayed in the detail area of the Affiliates tab. Click the PAGE 2 option button to enter additional information.

You can also enter affiliate information directly into the grid area of the tab by selecting **Hide Detail** from the right mouse button menu. The detail area of the tab disappears and you can add or edit the information in each cell of the grid.

> 📄 **Note**: The AFFILIATES tab contains a standard Trns•port filter and a quick find box you can use to search selected single columns of data.

To create a complete record you must enter information in these fields:

Affiliate Number	The name of the vendor associated with another vendor. All references to vendors are validated with the Vendor file.
Relation to Vendor	A value, which must be selected from the attached RELAT code table, which indicates the relationship between a vendor and its affiliate.

You are not required to, but you can enter information in these fields to record additional information about a vendor's affiliates:

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

Click OK when you have finished adding affiliate information or click CANCEL to return to the Affiliates grid without saving the new affiliate record. Before leaving the tabbed folder window you must save the new affiliate record to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

11.9.3 Adding an Affiliate Through the Vendor Affiliations List Window

You can add affiliate information for a vendor by selecting the vendor from the Vendors list window. Click the AFFILS button to display the Affiliations list window (see Figure 11-23).
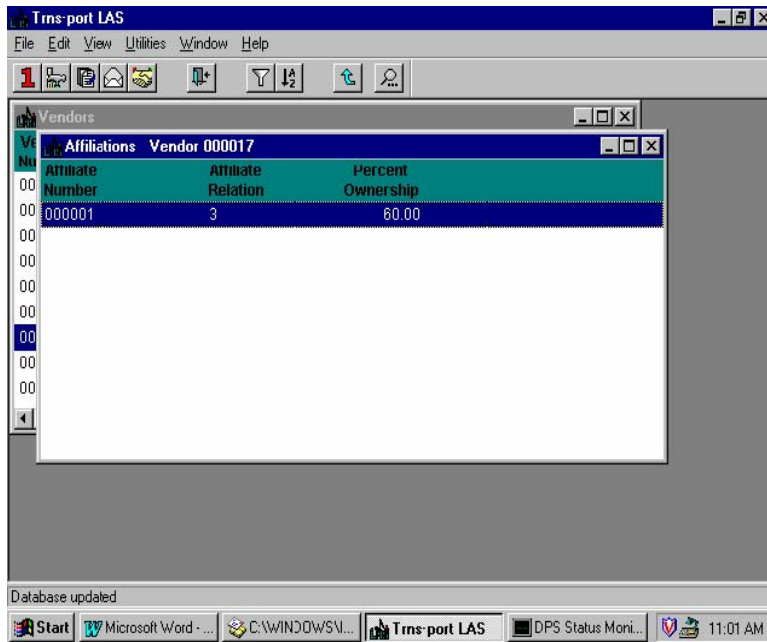
Figure 11-23. Affiliations List Window

Press INSERT or select **Add** from the right mouse button menu to display the Add Affiliate window (see Figure 11-24).
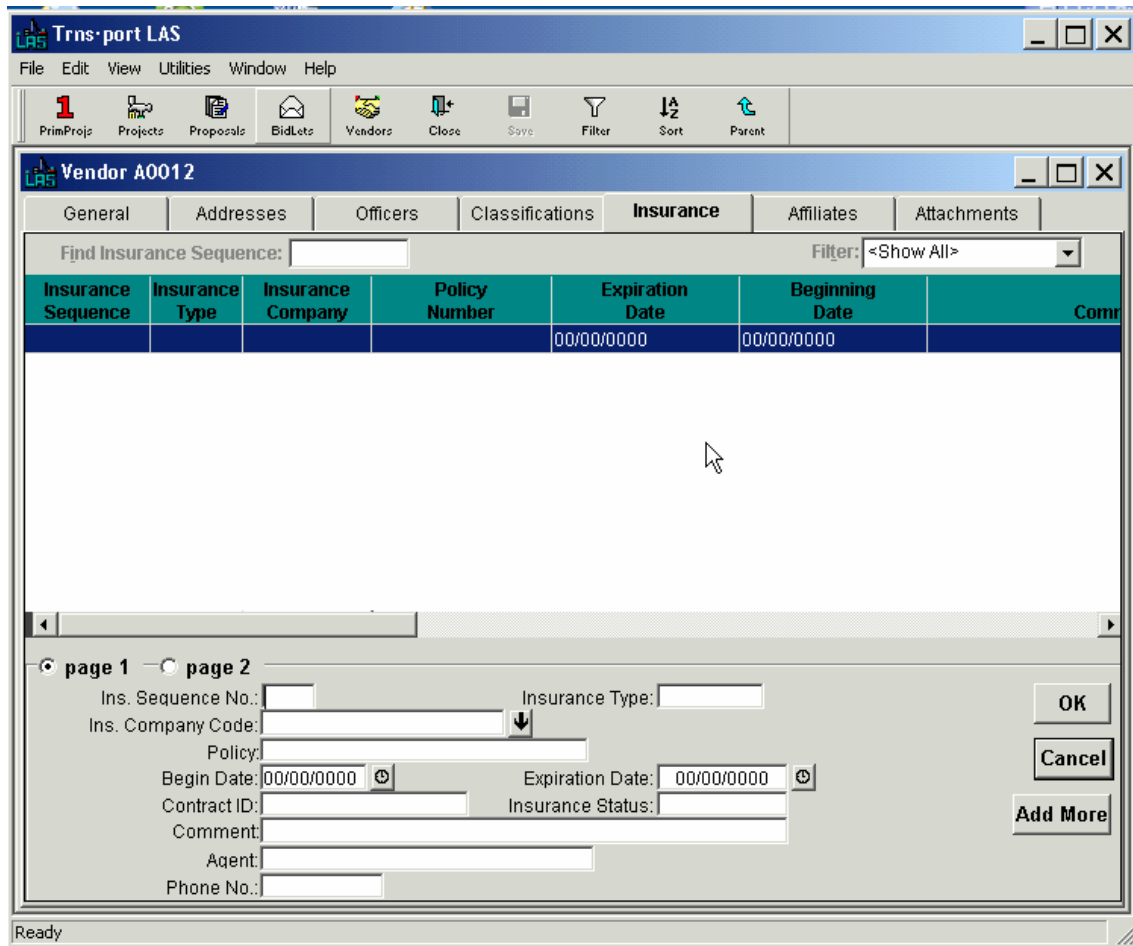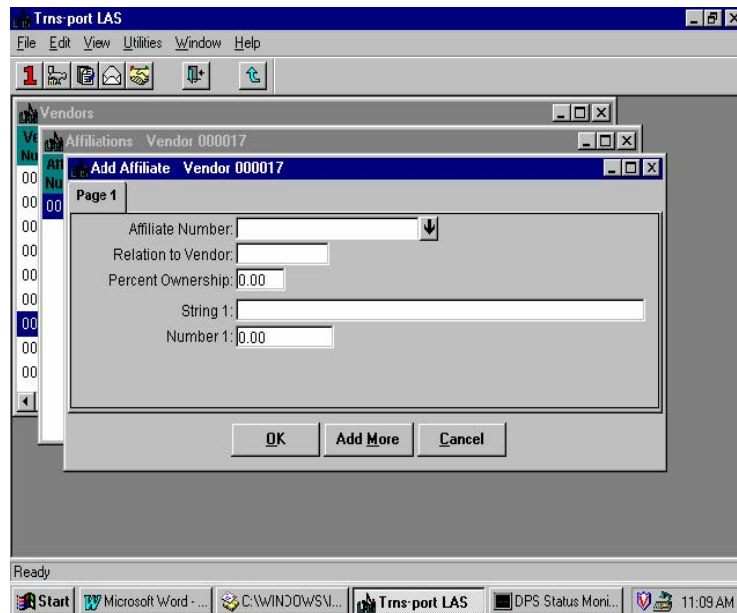

Figure 11-24. Add Affiliate Window

To create a complete record you must enter information in the fields listed in the previous section.

Click OK to add the affiliate information and return to the Affiliations list window or click ADD MORE to add another affiliate. Click the CLOSE button on the button bar to close the Affiliations list window and return to the Vendors list window.

11.9.4 Changing Affiliate Information

You can change affiliate information through the tabbed folder window or through the Vendor Affiliations window.

11.9.5 Changing Affiliate Information Through the Tabbed Folder Window

To change affiliate information, select the affiliate record you want to change on the AFFILIATES tab of the Vendor tabbed folder window. Trns•port displays all the existing information about the selected affiliate in the detail area of the Affiliates tab.

You can change or update any fields on the tab. To change information, click in a text box and add or delete information. Click OK when you finish making changes or CANCEL to return to the Affiliates grid without saving your changes.

11.9.6 Changing Affiliate Information Through the Vendor Affiliations Window

To change affiliate information, select the record you want to change in the Affiliations list window and choose **Change** from the right mouse button menu. Trns•port displays an Affiliate window.

You cannot change information in the Affiliate Number or Relation to Vendor fields. When you finish making changes, click OK to save your changes or CANCEL to return to the Affiliations list window without saving.

11.9.7 Deleting an Affiliate

You can delete an affiliate record through the tabbed folder window or through the Vendor Affiliations window.

11.9.8 Deleting a Vendor Affiliate Through the Tabbed Folder Window

To delete an affiliate, select the affiliate you want to delete from the list on the AFFILIATES tab of the Vendor tabbed folder window and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window. Click YES in the window to complete the delete process.

11.9.9 Deleting a Vendor Affiliate Through the Vendor Affiliations Window

To delete affiliate records, select the record or records in the Affiliations list window. You can select more than one record by holding down CTRL while you select with the mouse. Then choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES to continue the delete process or No to return to the Affiliations list window without deleting. If you click YES, Trns•port displays a Confirm Delete window. Click YES in the window to complete the delete process.

11.10 Using Vendor Attachments

The ATTACHMENTS tab allows you to integrate OLE-compatible documents (for example, Microsoft® Word documents or Excel spreadsheets), web pages, and plug-in applications into Trns•port. By adding an attachment to a vendor, you can access any information

related to the vendor in the attachment.

The ATTACHMENTS tab contains a grid that lists all the attachments associated with the vendor that is open in the tabbed folder window. Information displayed about each attachment includes the name, attachment type, and a short description (see Figure 11-25).
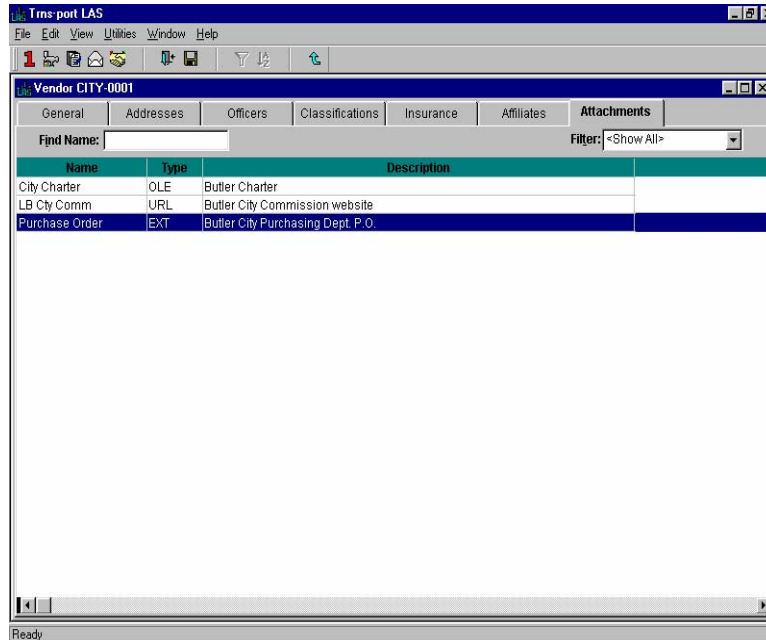
Figure 11-25. Attachments Tab

To open an attachment, select the attachment record in the list and choose **Open** from the **Edit** menu or the right mouse button menu. Double clicking on a row in the grid will also open an attachment. To open more than one attachment at a time, hold down CTRL and click on each attachment you want to open, then choose **Open** from the **Edit** menu.

11.11 Listing Vendors and Vendor Insurance Data

To produce a list of vendors and a list of vendor insurance data, select one or more vendors from the Vendors list window. (You can select more than one vendor by holding down CTRL while you select vendors with the mouse.) Choose **Run Process** from the **File** menu to display the Processes window.

To produce a list of vendors, choose **List Vendors** and click OK to display the Select Vendor Listings window (see Figure 11-26).
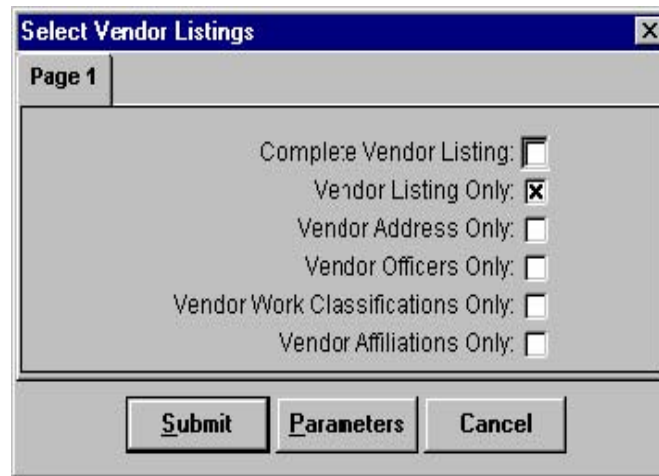
Figure 11-26. Select Vendors Listings Window

Select the parts of the report you want to print by clicking in the boxes. Then click SUBMIT to submit the process, PARAMETERS to change process submission information, or CANCEL to return to the Vendors list window without submitting the process. See "Submitting Batch Processes" in Chapter 3 for more information.

To produce a list of vendor insurance data, select **List Vendor Insurance** from the Processes window as described above.

11.12 Listing Alphabetized Vendors

To produce a list of alphabetized vendors, select one or more vendors from the Vendors list window. You can also select more than one vendor by holding down CTRL while you select vendors with the mouse. Choose **Run Process** from the **File** menu to display the Processes window.

To produce a list of vendors, choose **List of Alphabetized Vendors** and click OK to display the Select Vendor Listings window (see Figure 11-27).
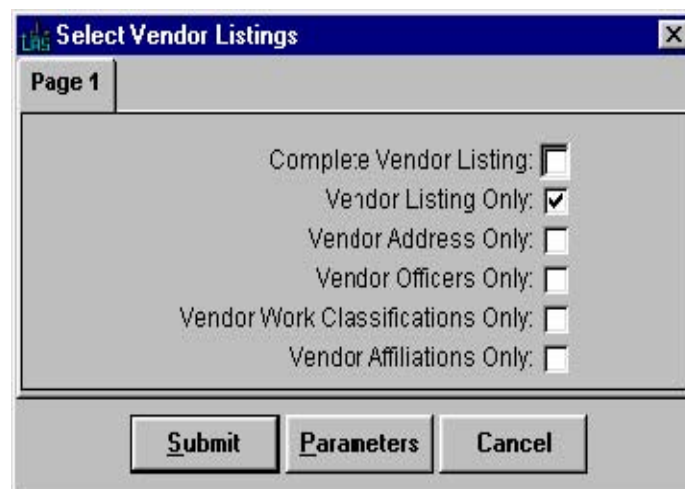
Figure 11-27. Select Vendors Listings Window

Select the parts of the report you want to print by clicking in the boxes. Then click SUBMIT to submit the process, PARAMETERS to change process submission information, or CANCEL to return to the Vendors list window without submitting the process.

11.13 Generating Mailing Labels

To generate mailing labels for vendors, select the vendor or vendors for whom you want to generate the labels from the Vendors list window (click the VENDORS button). Then choose **Run Process** from the right mouse button menu. Trns•port displays the Processes window (see Figure 11-28).

Figure 11-28. Processes Window

Choose **Generate Vendor Mailing Labels** and click OK. Trns•port displays a Mailing Label Parameters window (see Figure 11-29).

Figure 11-29. Mailing Label Parameters Window

Enter the number of labels you want to generate and the address number of the address you want printed. Click SUBMIT to submit the batch process to print mailing labels.

11.14 Generating Mailing Labels for Awarded Vendors

To generate mailing labels for awarded vendors, select the call or calls from the Letting Proposals list window for which you want to generate the labels.

Click the BIDLETS button to select the bid letting, and click LETPROP button to select the call. Then choose **Run Process** from the right mouse button menu. Trns•port displays the Processes window. Choose **Generate Awarded Vendor Mailing Labels** and click OK. Trns•port displays a Mailing Label Parameters window (see Figure 11-30).
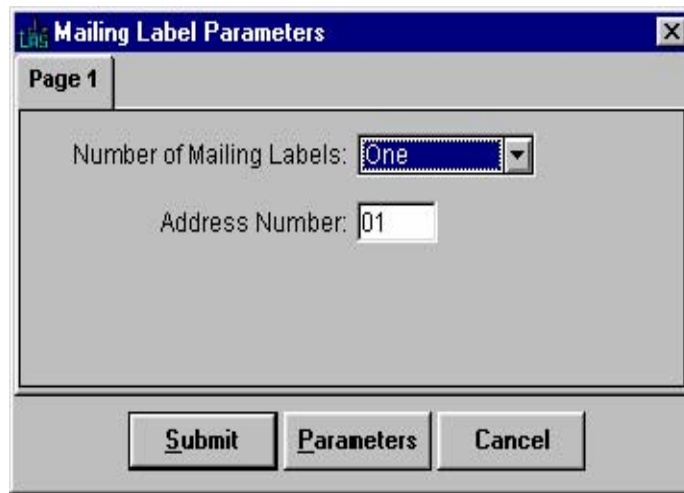
Figure 11-30. Mailing Label Parameters Window

Select the number of labels you want to generate and the address number of the address you want printed. Click SUBMIT to submit the batch process to print mailing labels.

12.0 Managing DBE/WBE/MBE Commitments (Civil Rights Division)

You can enter information about DBE, WBE, and MBE subcontractors when bidders submit their bids. If a project requires a DBE/WBE/MBE subcontractor to complete a certain percentage of the work, bidders must include this information in their bids:

- Each DBE/WBE/MBE subcontractor

- Type of work to be performed by the subcontractor

- Dollar commitment to the subcontractor

Each DBE/WBE/MBE contractor must have a record in the master vendor file. **If the vendor is a new subcontractor, you will have to add a new vendor record (see Chapter 11) before you can create a DBE/WBE/MBE Commitment record.**

12.1 Adding a DBE/WBE/MBE Commitment

To create a DBE/WBE/MBE Commitment header record, select a bid letting from the Trns•port LAS Bid Lettings list window (see Figure 12-1)
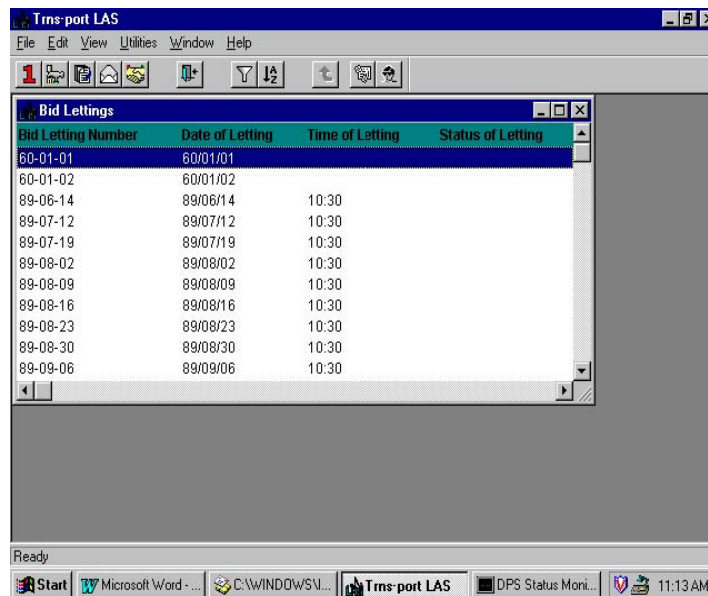
Figure 12-1. Bid Lettings List Window

Click the LETPROP button (or select **Letting Proposal List** from the right mouse button menu) to display the Letting/Proposals list window, which lists all proposals associated with the selected letting (see Figure 12-2).
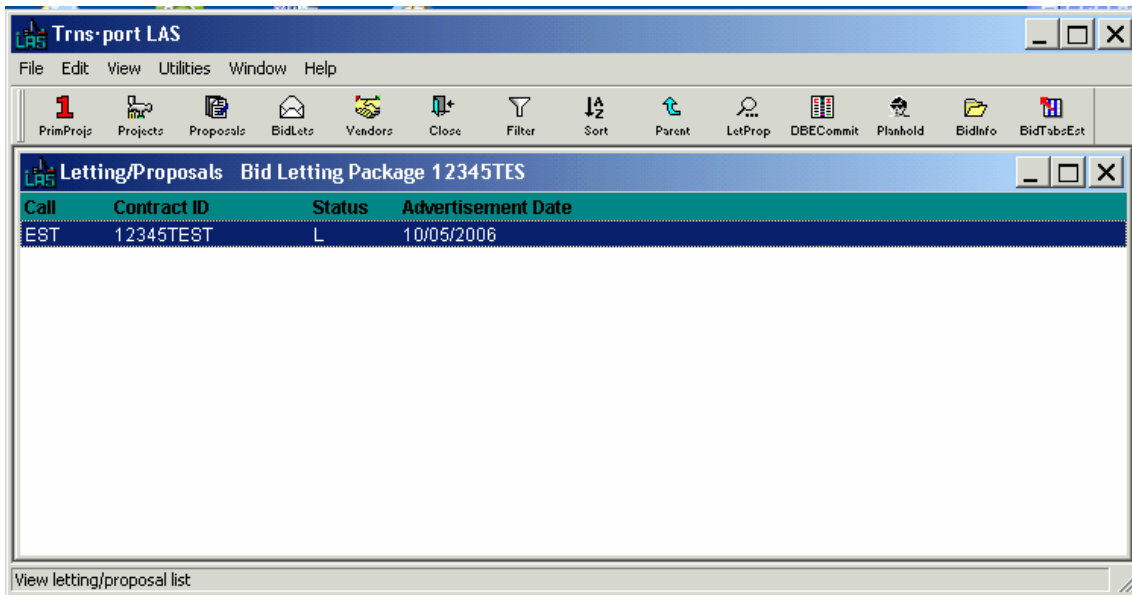
Figure 12-2. Letting/Proposals List Window

Select a letting proposal and click the DBE COMMIT button (or select **DBE Contract Commitments List** from the right mouse button menu) to display the DBE Commitments list window for the selected proposal (see Figure 12-3).
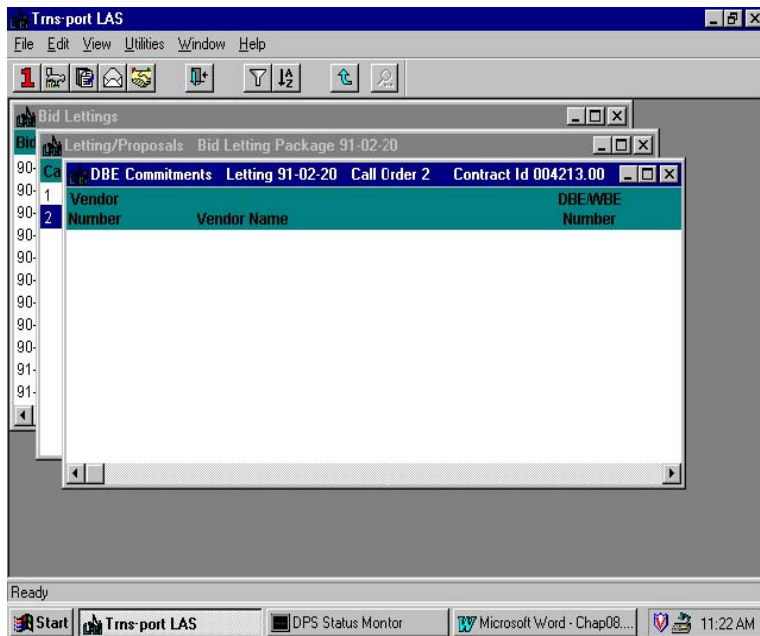
Figure 12-3. DBE Commitments List Window

You can add a new commitment by pressing INSERT or choosing **Add** from the right mouse button menu. Trns•port displays an Add DBE/WBE/MBE Commitment window (see Figure 12-4).
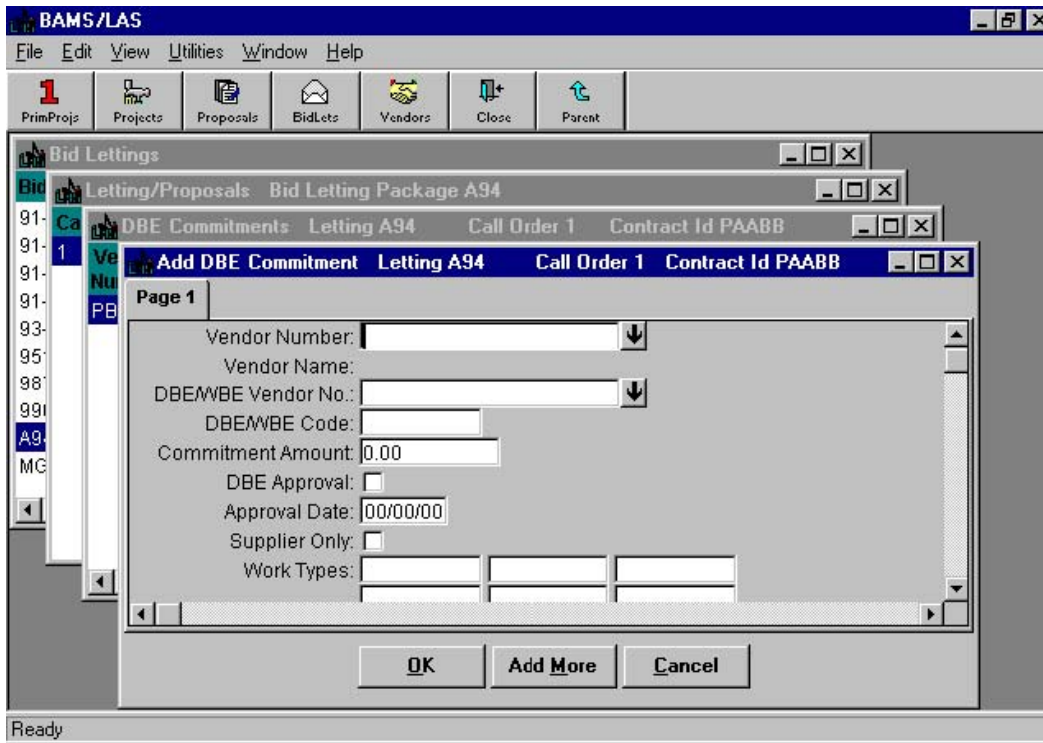
Figure 12-4. Add DBE/WBE/MBE Commitment Window

DBE/WBE Vendor Number	A value, which must be selected from the attached VENDOR code table, which is the vendor code for the particular DBE/WBE vendor.
Vendor Number	A unique identifier for a vendor. When you select the vendor number, Trns•port automatically enters the Vendor Name field. The vendor number comes from the Vendors file, so there should already be a record for each DBE/WBE/MBE contractor.

You are not required to, but you can enter information in these fields to record additional information about a DBE/WBE/MBE commitment:

Approval Date	The date the vendor was approved for work.
Commitment mount	The total dollars committed to the DBE/WBE vendor.
DBE Approval	Indicates the acceptability of the vendor to work on a contract.
Desc./Comment	A short description or written comment about the particular DBE/WBE vendor.
Work Types	A coded value, which must be selected from the attached VWRDCLS code table, which indicates the type of work a vendor is qualified to perform.

12.1.1 Adding a DBE/WBE/MBE Commitment in the Tabbed Folder Window

You can also enter DBE/WBE/MBE information about a bidder in the tabbed folder window. Select a bid letting in the Bid Lettings list window and choose **Letting Proposal List** from the right mouse button menu. Trns•port displays the Letting/Proposals list window.

In the list window select the proposal to which you want to add information and choose **Tabbed Folder Change** from the right mouse button menu. Trns•port displays the Letting/Proposal tabbed folder window.

To add DBE/WBE/MBE information, click the BID MANAGEMENT tab. Select a bidder from the list in the top part of the tab and click the DBE/WBE/MBE COMMITMENTS option button. Trns•port displays a list of all DBE/WBE/MBE commitment records for the bidder (see Figure 12-5).
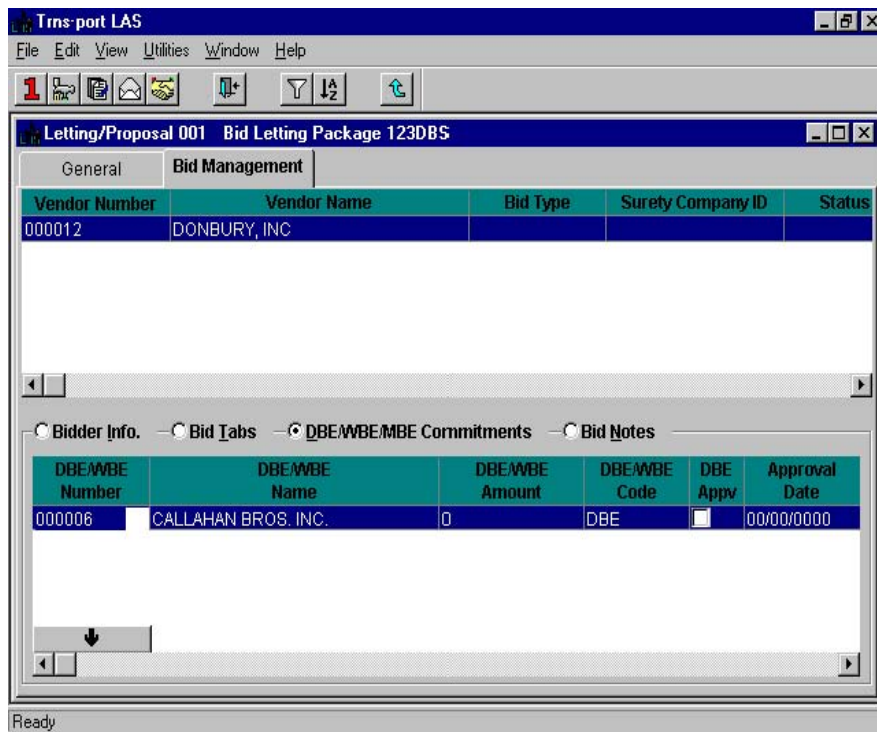
Figure 12-5. Bid Management Tab with DBE/WBE/MBE Commitments

To add a new record to the list, click inside the DBE/WBE/MBE Commitments list and choose **Add** from the right mouse button menu. Trns•port adds a new row to the list (see Figure 12-6).
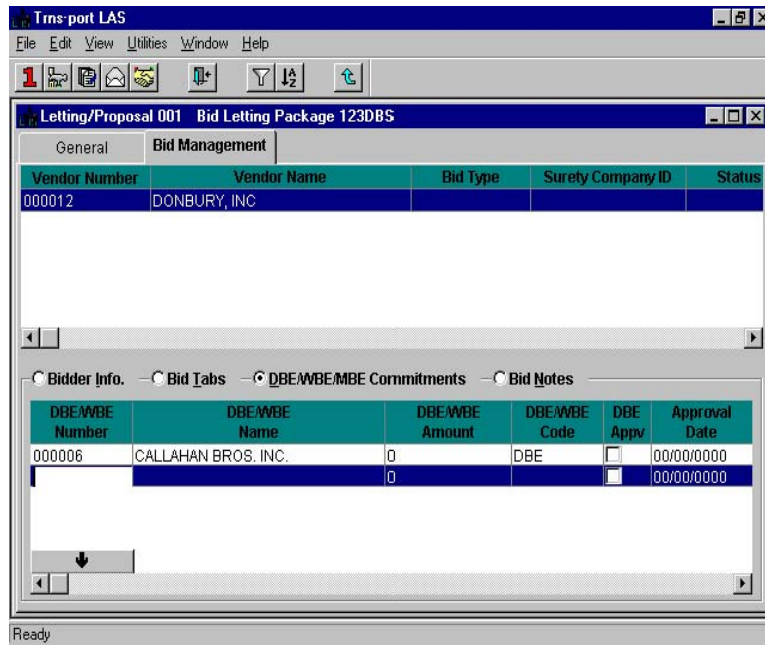
Figure 12-6. Adding DBE/WBE Commitment Information

To select the DBE/WBE Number, click the down arrow and select a vendor from the Vendor list window, using the scroll bar if necessary. You can also filter and sort the list to make it easier to find the vendor you want. Click OK.

Trns•port enters the vendor number and name in the row. Enter additional information about the DBE/WBE commitment by clicking in each field in the new row and typing the information, or by selecting values from automatic drop down lists.

Before leaving the tabbed folder window you must save the new DBE/WBE commitment record to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

12.2 Changing a DBE/WBE/MBE Commitment

To change an existing DBE/WBE/MBE commitment, follow these steps:

1. Click the BIDLETS button and select a bid letting from the Bid Lettings list window.

2. Click the LETPROP button (or select **Letting Proposal List** from the right mouse button menu) and select a letting proposal for the selected bid letting.

3. Select a letting proposal from the list window and click the DBE button (or select **DBE Contract Commitments List** from the right mouse button menu).

4. Select the DBE Commitment you want to change and choose **Change** from the right mouse button menu.

5. Make the changes to the window and click OK to save the changes.

12.2.1 Changing a DBE/WBE/MBE Commitment in the Tabbed Folder Window

To make changes to a DBE/WBE/MBE commitment record in the Letting/Proposal tabbed folder window, click the BID MANAGEMENT tab. Select the bidder in the top part of the tab and click the DBE/WBE COMMITMENT option button. Trns•port displays all the existing DBE/WBE commitment records for the bidder in the grid at the bottom of the tab.

Make changes by clicking in the fields and typing the new information, or by selecting new values from automatic drop down lists.

Before leaving the tabbed folder window you must save the new bidder information to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

12.3 Deleting a DBE/WBE/MBE Commitment

You can delete an existing DBE/WBE/MBE commitment by selecting a bid letting and a letting/proposal as described at the beginning of this chapter. Then click the DBE button or select **DBE Contract Commitments List** from the right mouse button menu. Trns•port displays a DBE Commitments list window.

Select the DBE Commitment you want to delete and choose **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES in each window to complete the delete process.

12.3.1 Deleting a DBE/WBE/MBE Commitment in the Tabbed Folder Window

You can also delete DBE/WBE/MBE commitment records in the tabbed folder window. Open the Letting/Proposal tabbed folder window and select the BID MANAGEMENT tab. Select the bidder in the top part of the tab and click the DBE/WBE COMMITMENT option button. Trns•port displays all the existing DBE/WBE commitment records for the bidder in the grid at the bottom of the tab.

Click the row containing the DBE/WBE/MBE record you want to delete and select **Delete** from the right mouse button menu. Trns•port displays a Delete Warning window.

Click YES in the window to complete the delete.

Before leaving the tabbed folder window you must save the change in DBE/WBE/MBE commitment information to the database by clicking the SAVE button or selecting **Save** from the **File** menu.

12.4 Listing a DBE/WBE Commitment

You can produce a hard copy listing of the DBE/WBE commitment information. Select a bid letting in the Bid Lettings list window. Then select a letting/proposal or proposals in the Letting/Proposals list window. Choose **Run Process** from the right mouse button menu. Trns•port displays a Processes window.

Select **List DBE/WBE Commitments** from the list and click OK to submit a batch process. Trns•port displays a Confirm Process Submission window.

Click SUBMIT to submit the batch process, PARAMETERS to change process submission parameters, or CANCEL to return to the Letting/Proposals list window without submitting the process.

13.0 Exporting LAS Information to Other Trns•port Modules

After a contract is awarded you can export the related information to other Trns•port modules for construction management and data archive.

13.1 Passing Data to Trns•port SiteManager

You can export contract and project information (such as descriptive information, item quantities and estimated prices, bid data, and award information) to Trns•port SiteManager once the contract has been awarded. **When you pass data to SiteManager, Trns•port does not delete data from the Trns•port LAS database.**

This process does not write data directly to the SiteManager database. Trns•port produces multiple intermediate files or "pass files" in a format that SiteManager can import (see Figure 13-1).

Each awarded contract you want to pass to SiteManager **MUST** contain this information:

1. The winning vendor's record must contain at least one address and the Planholder Bill-to Address must be a valid vendor address record.

2. The Letting Proposal Letting Status field must contain a value found in the AWARDED code table.

3. The Passed to Construction/DSS field (in the Letting/Proposal window) must be blank (which means the proposal or contract has not been passed) or contain the letter D (which means the proposal or contract has previously been passed to Trns•port BAMS/DSS, but has not been passed to Trns•port SiteManager.). After Trns•port completes the Pass Contract Data to SiteManager process, it changes a blank to a C (passed to construction), or a D to a B (passed to both construction and BAMS/DSS).

4. Additional data edits are performed in the process that may reject the contract.
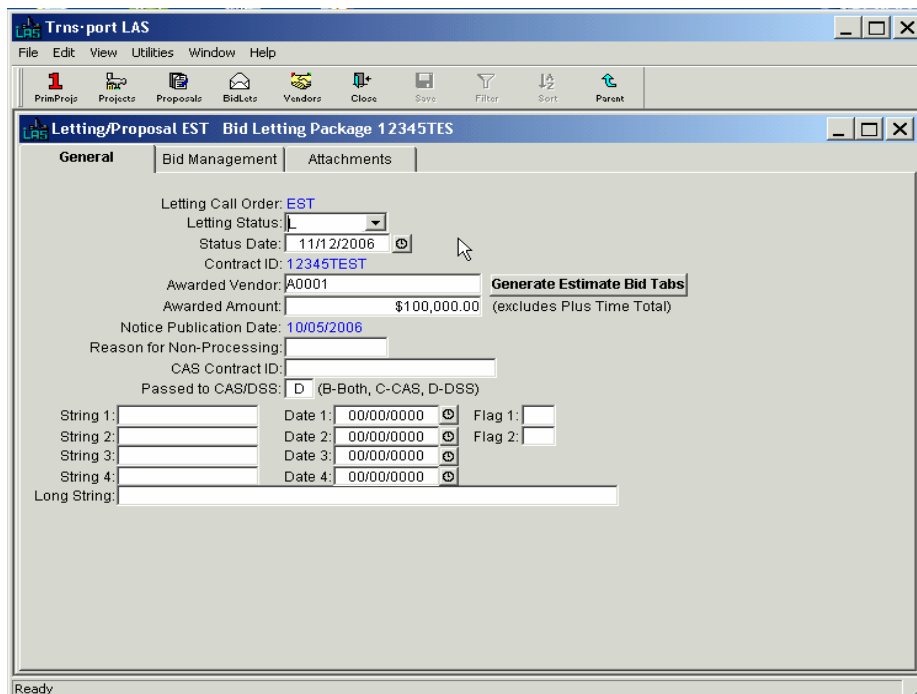
Figure 13-1. Letting/Proposal Window

If you must correct or add to a contract, do it in Trns•port LAS and pass the contract to SiteManager again. To reset the values in the Letting Status and Passed to Construction/DSS fields for a contract (so that you can pass the contract again), follow the steps in the "Managing a Bid Letting" chapter of this guide.

To access the export process, select **Export** from the **File** menu and then slide the mouse to the right to select **Pass Contract Data to SiteManager** (see Figure 13-2).
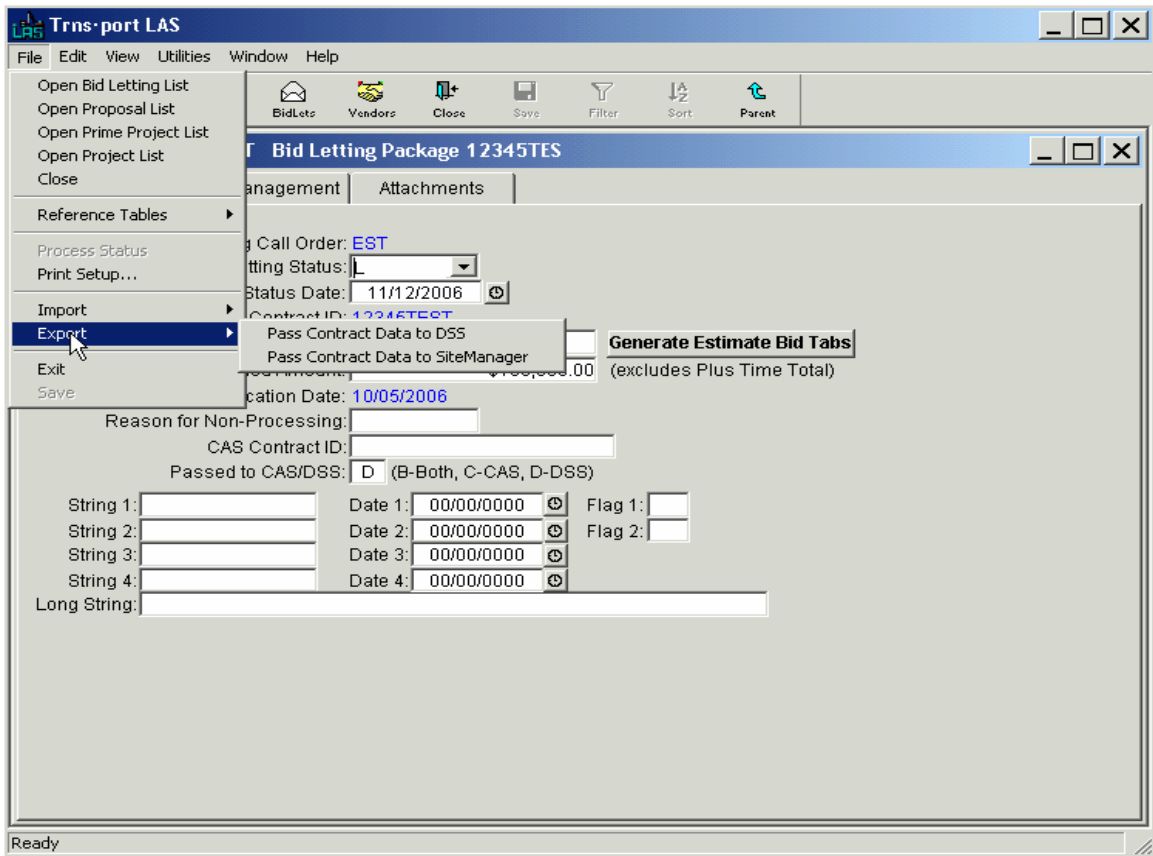
Figure 13-2. Export Menu Options

Trns•port displays an LAS Pass to SiteManager Options window (see Figure 13-3).

Figure 13-3. LAS Pass to SiteManager Options Window

You can choose to pass all the reference data (Items, Funds, Vendors, Districts) or only the reference data specifically identified in the contracts being exported. You can also choose to generate pass files containing the Trns•port PES and LAS data that is not exported into SiteManager (called unmapped data). When you have finished making your selections, click OK.

Trns•port displays a Client Job Monitor window confirming that your process was submitted. Click OK.

When you invoke the batch process, Trns•port will generate a pass file containing all contract and reference data to pass to SiteManager. The names of these files are stored in the Trns•port system parameter QLASPTSM. To view or modify this parameter, select **System Management** from the **Utilities** menu and choose **System Parameters List.**

> 🗎 **Note**: Each time you run this process, Trns•port generates new pass files.
> Trns•port will destroy or overwrite any existing pass files.

After you generate the pass file, load it into SiteManager with the appropriate import process.

This process also generates a Pass Contract to SiteManager Edit report, which lists all contracts Trns•port LAS passed to Trns•port SiteManager, any error messages, and reasons for not passing the data.

13.2 Passing Data to Trns•port BAMS/DSS

You can copy proposal and project information (such as descriptive information, item quantities and estimated prices, bid data, and award information) to Trns•port BAMS/DSS for historical analysis. When you pass data to Trns•port BAMS/DSS, Trns•port does not delete data from the Trns•port LAS database.

This process does not write data directly to the Trns•port BAMS/DSS database. Trns•port produces an intermediate file or "pass file" in a format that Trns•port BAMS/DSS can import.

Each proposal or contract record you want to pass to BAMS/DSS must contain this information:

1. The Letting Status field must contain a value found in the AWARDED, REJECTED, or CANCEL code tables.

2. The Passed to CAS/DSS field (in the Letting/Proposal window) must be blank (which means the proposal or contract has not been passed) or contain the letter C (which means the proposal or contract has previously been passed to Trns•port SiteManager via the SiteManager Contract Initialization process but has not been passed to Trns•port BAMS/DSS). After Trns•port completes the Pass Contract Data to DSS process, it changes a blank to a D (passed to BAMS/DSS) or a C to a B (passed to both CAS and BAMS/DSS) (see Figure 13-4).
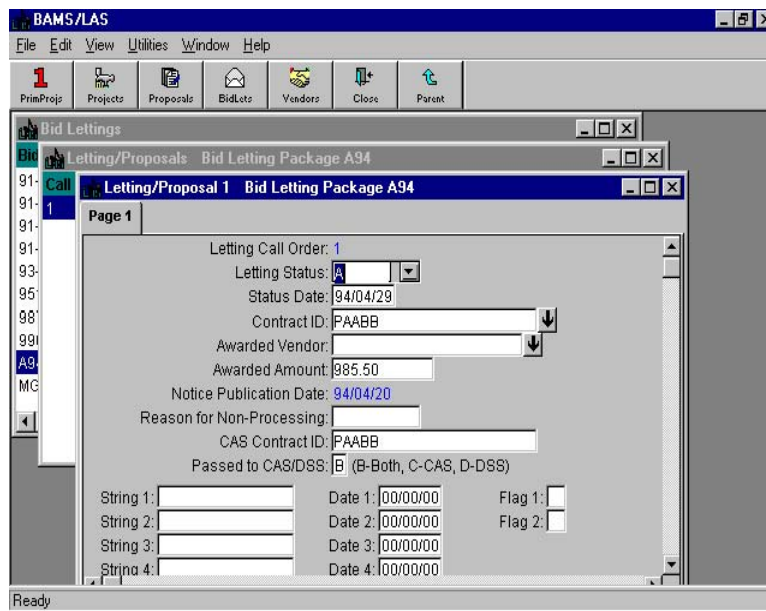
Figure 13-4. Letting/Proposal Window

If you must correct or add to a contract, do it in Trns•port LAS and pass the contract to Trns•port BAMS/DSS again. To reset the values in the Letting Status and Passed to CAS/DSS fields for a contract (so that you can pass the contract again), follow the steps in "Changing Letting/Proposals", Chapter 8, in this Guide.

To access the pass facility, select **Export** from the **File** menu. Trns•port displays the Export menu options (see Figure 13-5).
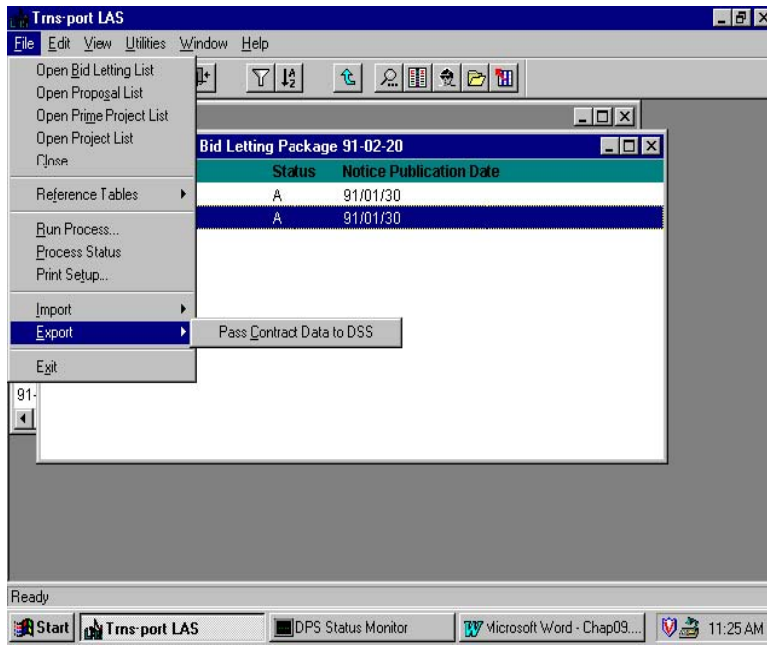
Figure 13-5. Export Menu Options

Slide the mouse to the right to select Pass Contract Data to DSS. Trns•port displays a Confirm Process Submission window (see Figure 13-6).
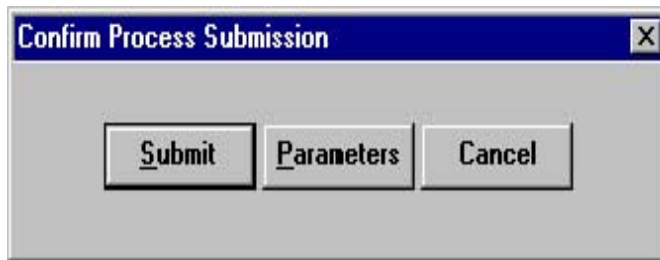
Figure 13-6. Confirm Process Submission Window

Click SUBMIT to submit the batch process, click PARAMETERS to change process submission parameters, or click CANCEL to cancel batch process submission.

When you invoke the batch process, Trns•port will generate a pass file containing all contract data to pass to BAMS/DSS. The name of this file (IMPORTL.DAT) is stored in the Trns•port system parameter QLDSSTRX. To view or modify this parameter, select **System Management** from the **Utilities** menu and choose **System Parameters List.**

> 🖹 **Note**: Each time you run this process, Trns•port generates a new pass file. Trns•port will destroy or overwrite any existing pass file.

After you generate the pass file, load it into Trns•port BAMS/DSS with the Trns•port BAMS/DSS Import process.

> ❗ **Caution**: If Trns•port BAMS/DSS rejects any contracts during the import process, you should review any generated exception messages. Trns•port will pass the rejected records to the Error database.

This process also generates a processing log file, which lists all contracts Trns•port LAS passed to Trns•port BAMS/DSS and the contracts that were not passed.

14.0 Maintaining Reference Tables - PES

In this chapter you will learn how to maintain the Trns•port reference tables, which Trns•port uses in all modules:

To view a list of Trns•port reference tables, while in the PES application module, select **Reference Tables** from the **File** menu (see Figure 14-1).
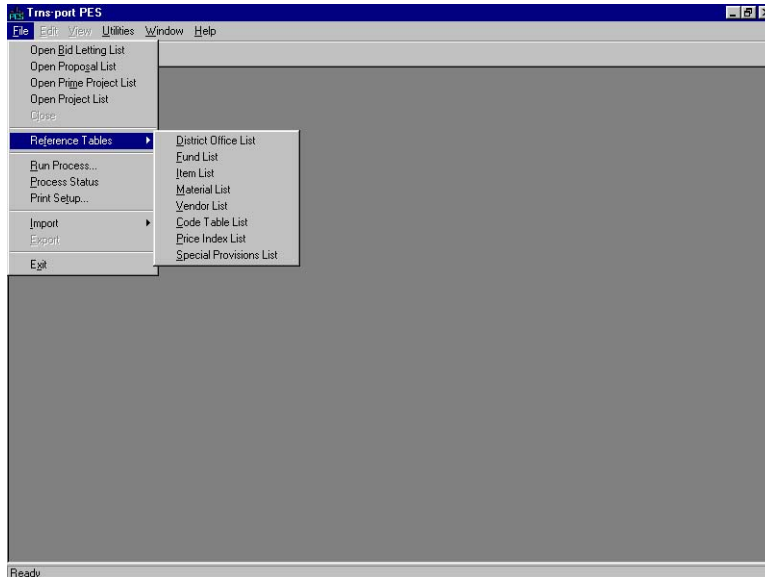
Figure 14-1. Reference Tables List

14.1 District Office List

If you choose **District Office List** from the **Reference Tables** menu, Trns•port displays the District Offices list window (see Figure 14-2).
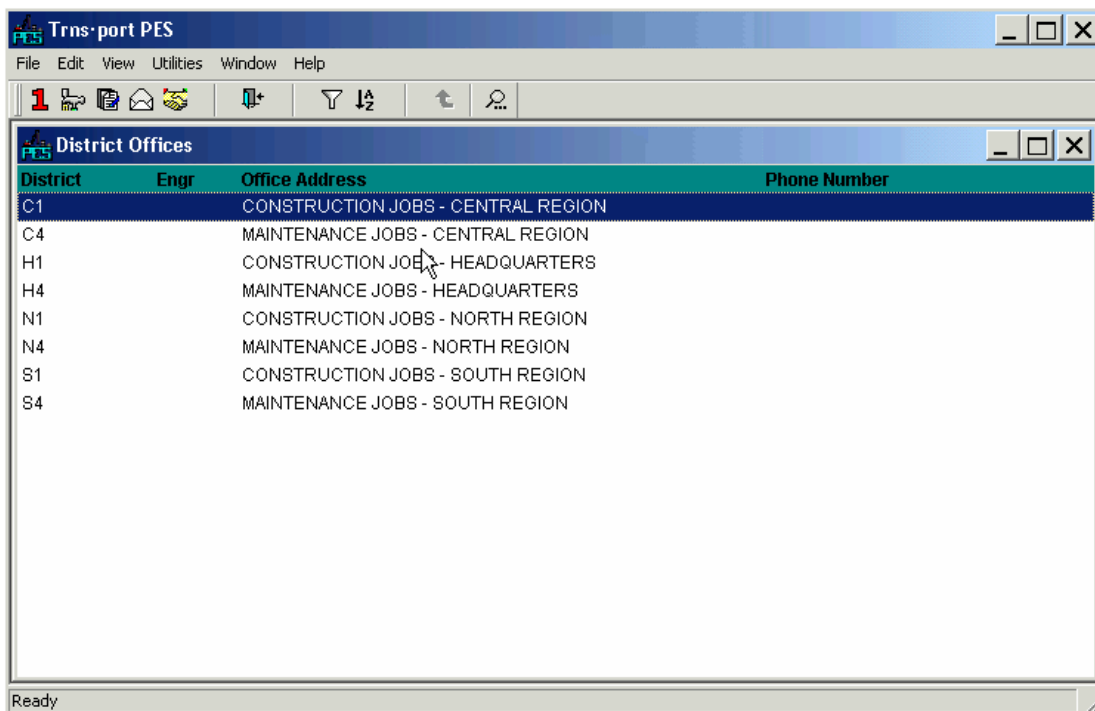
Figure 14-2. District Offices List Window

14.1.1 Adding a District Office

To add a district office to the reference table, press INSERT or choose **Add** from the right mouse button menu. Trns•port displays the Add District window (See Figure 14-3).
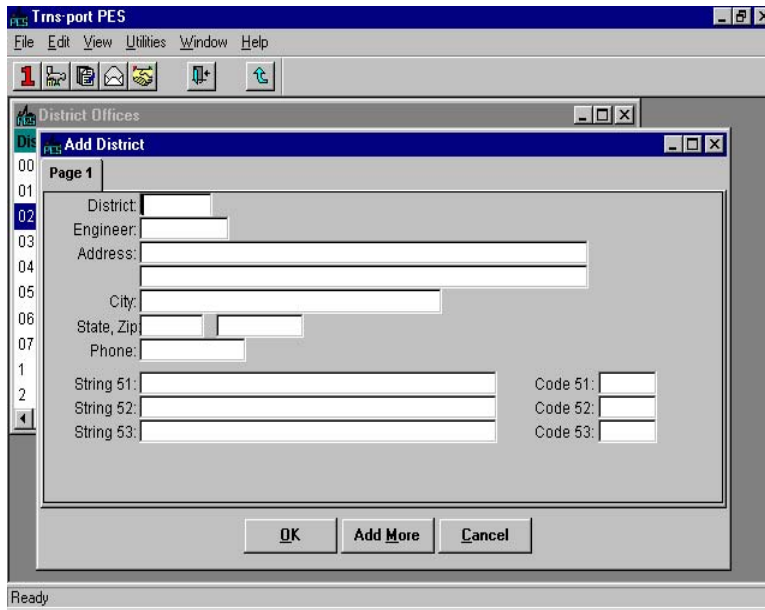
Figure 14-3. Add District Window

To create a complete record you must enter information in these fields:

District	The district where a project or contract is located. The first 2 digits identify the district and the last characters specify a sub-division of the district.

You are not required to, but you can enter information in these fields to record additional information about a district office:

Address	The address of the district, area office, field office or residency.
City	The city in the district address.
Engineer	A code value (that must be in the STAFF code table) indicating the engineer in charge of the district, area office, residency or field office.
Phone	The phone number (including area code or extension) of the district, area office, field office, or residency.
State, Zip	The two-letter state code and zip code for the district's address.

Click OK to save the new record, ADD MORE to add another record, or CANCEL to return to the District Offices list window without adding a record.

14.1.2 Changing an Existing District Office Record

To change an existing record in the reference table, select a district from the District

Offices list window and click the OFFICE button or choose **District Office** from the right mouse button menu. Trns•port displays the District window.

You can add information to or change any field except the District field. When you finish making changes, click OK to save the changes or CANCEL to return to the District Offices list window without saving.

Click the CLOSE button on the button bar to close the District window and return to the District Offices list window.

14.1.3 Deleting a District Office

To delete a district office record, select the record in the District Offices list window and select **Delete** from the right mouse button menu. Trns•port displays a series of delete warning windows. Click YES in each window if you are sure you want to delete the record.

14.1.4 Producing a District List

To produce a District List report listing, select the district or districts for which you want a listing in the District Offices list window and choose **Run Process** from the right mouse button menu. Trns•port displays a Processes window.

Select **List Districts** and click OK to run a process to print the listing.

Click the CLOSE button on the button bar to close the District Offices list window.

14.2 Fund List

If you choose **Fund List** from the Reference Tables list, Trns•port displays the Funds list window (see Figure 14-4).

Figure 14-4. Funds List Window

14.2.1 Adding a Funding Source

To add a funding source to the reference table, press INSERT or choose **Add** from the right mouse button menu. Trns•port displays the Add Funding Source window (see Figure 14-5).
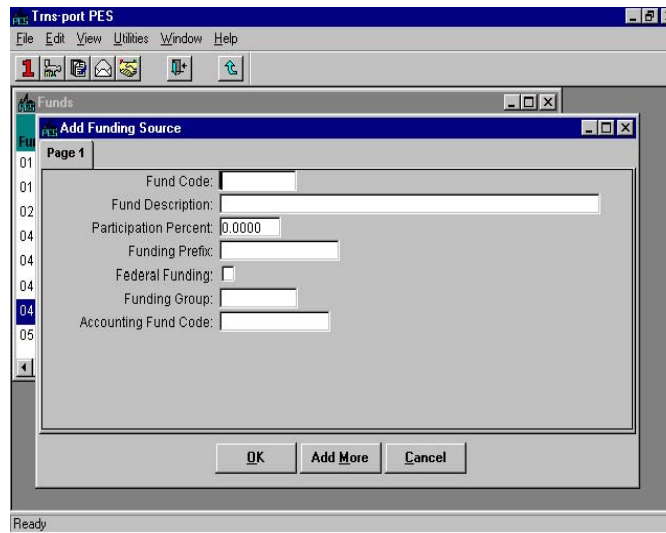
Figure 14-5. Add Funding Source Window

To create a complete record you must enter information in these fields:

Fund Code	A unique identifier for a funding source.
Fund Description	A short description of the fund.
Fund Priority Order	A sequence number you use to indicate the order in which you should encumber funds when certain funds have limited participation. Make sure your lowest priority funds do not have participation limits.
Participation Percent	The portion of work a particular fund will pay.

You are not required to, but you can enter information in these fields to record additional information about a fund:

Accounting Funding Code	You can enter your agency's accounting department codes for funds or groups of funds in this field.
Federal Funding	Mark the check box if the fund contains federal dollars.
Funding Prefix	An alternate name for a fund.

When you finish adding information, click OK to save the new record, ADD MORE to add another record, or CANCEL to return to the Funds list window without adding a record.

14.2.2 Changing a Funding Source

To change a funding source record in the reference table, select a fund record from the

Funds list window and click the FUND button or choose **Change** from the right mouse button menu. Trns•port displays the Fund window.

You can change information in any field except the Fund Code field. When you finish making changes, click OK to save the changes or CANCEL to return to the Funds list window without making changes.

14.2.3 Deleting a Funds Record

To delete a funds record, select the record in the Funds list window and select **Delete** from the right mouse button menu. Trns•port displays a series of delete warning windows. Click YES in each of the windows if you are sure you want to delete the record.

14.2.4 Producing a Funds List

To produce a Funds List report listing, select the fund or funds for which you want a listing in the Funds list window and choose **Run Process** from the right mouse button menu. Trns•port displays a Processes window.

Select **List Funds** and click OK to run a process to print the listing. See "Running a Process" in Chapter 3 for more information.

Click the CLOSE button on the button bar to close the Funds list window.

14.3 Item List

If you choose **Item List** from the Reference Tables list, Trns•port displays the Items list window (see Figure 14-6).

Figure 14-6. Items List Window

14.3.1 Adding an Item

To add an item to the reference table, press INSERT or choose **Add** from the right mouse button menu. Trns•port displays the Add Item window (see Figure 14-7).

Figure 14-7. Add Item Window

To create a complete record you must enter information in these fields:

Item Class Function	A coded value indicating the classification or category into which the item fits. Used by Trns•port BAMS/DSS to group items into the same market share.
Item Number	A unique identifying number or alphanumeric assigned to each item.
Long Description	A long description of the item (maximum 60 characters).
Short Description	A short description of the item (maximum 40 characters). When Trns•port lists items on a scroll window, Trns•port displays the first 30 characters of the item short description beside the item number. The first 30 characters should therefore contain enough information to uniquely distinguish an item from all other items.

Spec Year	Because Trns•port contains projects designed at different times, you cannot change the reference information about each item (such as description and unit). Doing so would change the meaning of projects already in progress. Instead, you can create entirely new reference item lists when necessary. You can distinguish these lists by a spec year. This field identifies the specification year item list used on the project.
Type of Item (Matls)	A value, which you must select from the attached ITEMTYP code table that identifies the material type of the item.
Unit of Measure	A value, which you must select from the attached UNITS code table, that indicates the type of measurement used to determine one unit for lump sum items.

You are not required to, but you can enter information in these fields to record additional information about an item:

Alternate Item ID	A separate item code used in public documents or communication with other systems if the regular item number is inappropriate. For example, the regular item code might be too specific for public documents.
Combine with Like Items	Trns•port will combine category items into a single proposal line item if they match in four fields: the item number, the supplemental description, the item alternate code, and supplemental proposal description. If you want to stop Trns•port from doing that, make sure the check box is marked. This will force Trns•port to create a separate proposal line item for this category item. Trns•port will combine different category items into a single proposal line item.
Common Unit of Measure	A value, which must be selected from the attached UNITS code table, that indicates the common unit of measure to which Trns•port can convert the item for comparison to other items.

Conv. to Common Units	Trns•port multiplies this conversion factor by the item quantity to convert the item units to the common unit of measure.
DBE Apply Interest	A percentage indicating the average number of times this item is selected for DBEs and the value of the item portion set-aside for DBEs.
DBE Interest Flag	Indicates whether an item is often of interest to or is selected for DBW/WBE set-aside.
Exempt from Retainage	Indicates whether Trns•port should withhold retainage for work performed on a specific item.
Fuel Adjustment Type	A value, which must be selected from the attached FUELTYP code table, that indicates an item might require a fuel price adjustment.
Historical Price	The price that you have historically used for an item.
Lump Sum Item Units	A value, which must be selected from the attached UNITS code table, that identifies the type of measurement used to determine the unit of one lump sum item.
Major Item	Indicates that an item is important enough to appear on the Notice to Contractors, regardless of the dollar amounts allocated to it.
Obsolete Item	Indicates that an item is obsolete and should no longer be used on new projects.
Regression Inclusion	This field is not currently used.
Require Supplemental Description	When checked, you must enter a supplemental description when adding an item to a project.
Specialty Item Flag	Indicates whether an item is a specialty item.

When you finish adding information, click OK to save the new record, ADD MORE to add another record, or CANCEL to return to the Items list window without adding a record.

14.3.2 Copying Items

To copy information about an existing item to a new item, select the item you want to

copy information from in the Item List window. Select **Copy Special** from the **Edit** menu. Trns•port displays the Copy Item window with the selected items' item number and spec year displayed.

Enter a number for the new item in the New Item Number field and a Spec Year in the New Spec Year field. Click OK to save the new item or CANCEL to return to the Items list window without saving.

14.3.3 Changing Item Information

To change a record in the Item List reference table, click the ITEMS button or choose **Change** from the right mouse button menu. Trns•port displays an Item window.

You can add or change information in any field except Item Number and Spec Year. When you finish making changes, click OK to save the changes or CANCEL to return to the Items list window without saving.

14.3.4 Adding an AutoPay Item

An item can be set up to be paid automatically to the contractor based on the percent complete of the contract. To do this, you must set up the payment schedule information. To add an automatically paid item, click the AUTOPAY button or select **Automatically Paid Items** from the right mouse button menu. Trns•port displays the Automatic Payment Records list window (see Figure 14-8).
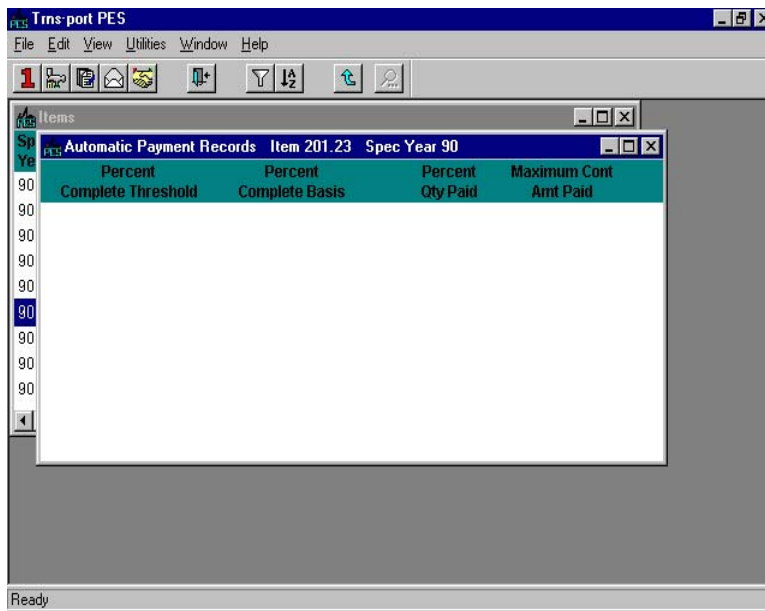
Figure 14-8. Automatic Payment Records List Window

Press INSERT or choose **Add** from the right mouse button menu to display the Add Auto Payment window (see Figure 14-9).

Figure 14-9. Add Auto Payment Window

To create a complete record you must enter information in this field:

Percent Complete Basis	A value, which must be selected from the attached PAYPCT code table, that indicates the method used to determine the current percent of work complete.

You are not required to, but you can enter information in these fields to record additional information about an automatic payment item:

Maximum Capacity	The maximum amount of work, in dollars, that a vendor can perform.
Percent Complete Threshold	A percent of item completion that determines if an item should be paid automatically.
Percent of Quantity Paid	The percentage of the current item quantity to be paid to date at an automatic payment threshold.

When you finish adding information, click OK to save the record, ADD MORE to add another record, or CANCEL to return to the Automatic Payment Records list window without making changes.

14.3.5 Adding Item Materials

To add item materials, click the MATERIAL button or select **Item Materials** from the right mouse button menu. Trns•port displays the Item Materials list window (see Figure 14-10).
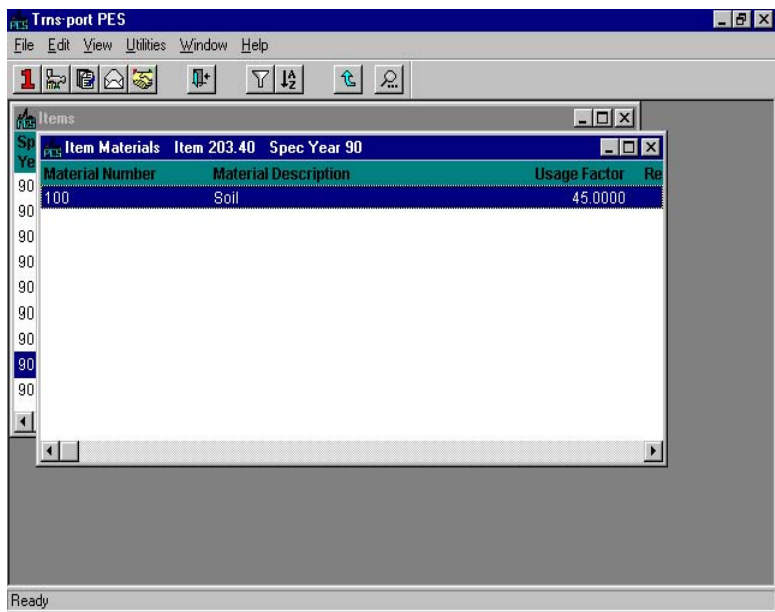
Figure 14-10. Item Materials List Window

Press INSERT or choose **Add** from the right mouse button menu to display the Add Material window (see Figure 14-11).
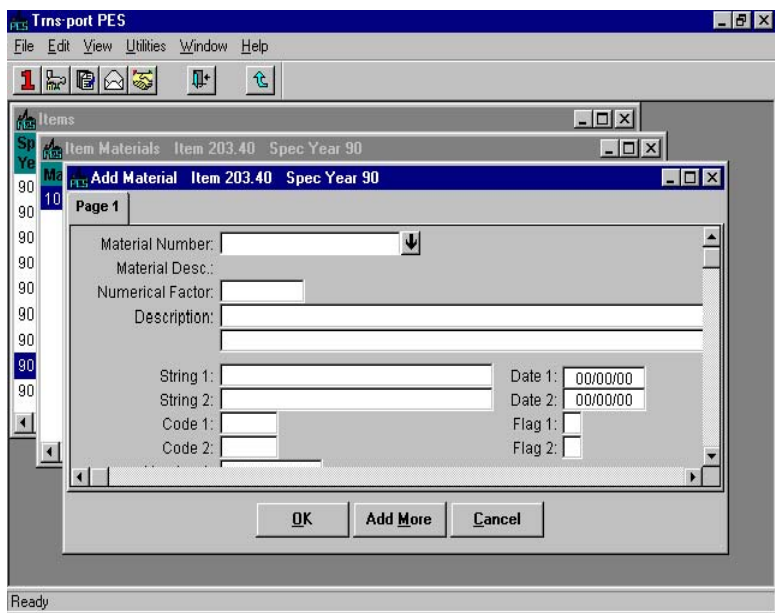
Figure 14-11. Add Material Window

To create a complete record you must enter information in these fields:

Material Number	A unique number or alphanumeric that identifies the material.
Numerical Factor	A numerical factor describing the quantity relationship between the item and the material.

You are not required to, but you can enter information in these fields to record additional information about an item material:

Description	A short description of the item material.
Material Desc.	A short description of the material.

When you finish adding information, click OK to save the record, ADD MORE to add another record, or CANCEL to return to the Item Materials list window without making changes.

14.3.6 Producing an Item List

To produce an Item List report listing, select the item or items for which you want to produce a listing and choose **Run Process** from the right mouse button menu. Trns•port displays a Processes window.

Select **List Items** and click OK to run a process to print the listing.

14.3.7 Deleting an Item Record

To delete an item record, select the record in the Items list window and select **Delete** from the right mouse button menu. Trns•port displays a series of delete warning windows. Click YES in each of the windows if you are sure you want to delete the record.

14.4 Material List

If you choose **Material List** from the **Reference Tables** menu, Trns•port displays the Materials list window (see Figure 14-12).
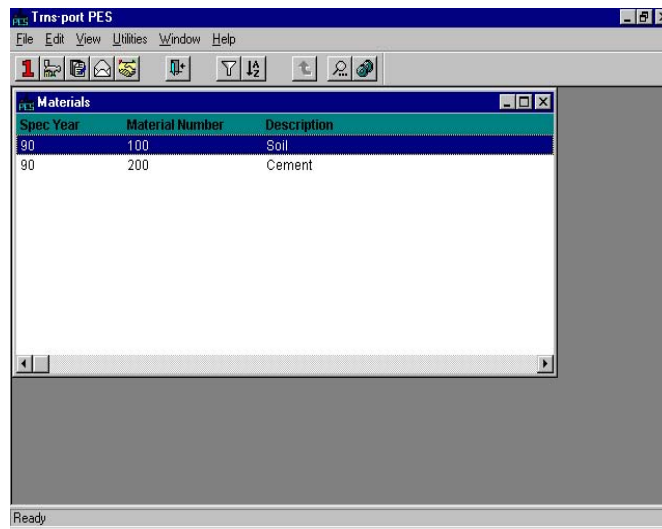
Figure 14-12. Materials List Window

14.4.1 Adding Materials

To add information about materials to the Material List reference table, press INSERT or choose **Add** from the right mouse button menu. Trns•port displays the Add Material window (see Figure 14-13).
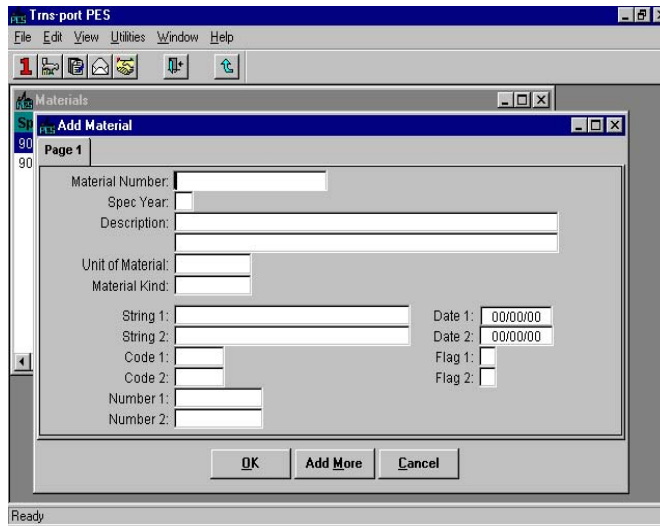
Figure 14-13. Add Material Window

To create a complete record you must enter information in these fields:

Description	A short description of the material.
Material Number	A unique number or alphanumeric that identifies the material.
Spec Year	Because Trns•port contains projects designed at different times, you cannot change the reference information about each item (such as description and unit). Doing so would change the meaning of projects already in progress. Instead, you can create entirely new reference item lists when necessary. You can distinguish these lists by a spec year. This field identifies the specification year item list used on the project.

You are not required to, but you can enter information in these fields to record additional information about a material:

Material Kind	Value indicating the kind of material.
Unit Material	A value, which must be selected from the attached UNITS code table, that indicates the type of measurement used to determine the units of the material.

When you finish adding information, click OK to save the new record, ADD MORE to add another record, or CANCEL to return to the Materials list window without adding a record.

14.4.2 Changing Material Information

To change an existing record in the reference table, select a materials record from the Materials list window and click the MATERIALS button or choose **Change** from the right mouse button menu. Trns•port displays the Material window.

You can add information to or change any field except Material Number and Spec Year. When you finish making changes, click OK to save the changes or CANCEL to return to the Materials list window without saving changes.

14.4.3 Deleting Material Information

To delete a materials record, select the record in the Materials list window and select **Delete** from the right mouse button menu. Trns•port displays a series of delete warning windows. Click YES in each of the windows if you are sure you want to delete the record.

14.4.4 Listing Materials

To produce a listing of materials, select the material or materials for which you want to produce a listing and choose **Run Process** from the right mouse button menu. Trns•port displays a Processes window.

Select **List Materials** and click OK to submit a batch process to print the listing.

Click the CLOSE button on the button bar to close the Materials list window.

14.5 Vendor List

If you choose **Vendor List** from the **Reference Tables** menu, Trns•port displays a Vendors list window (see Figure 14-14).
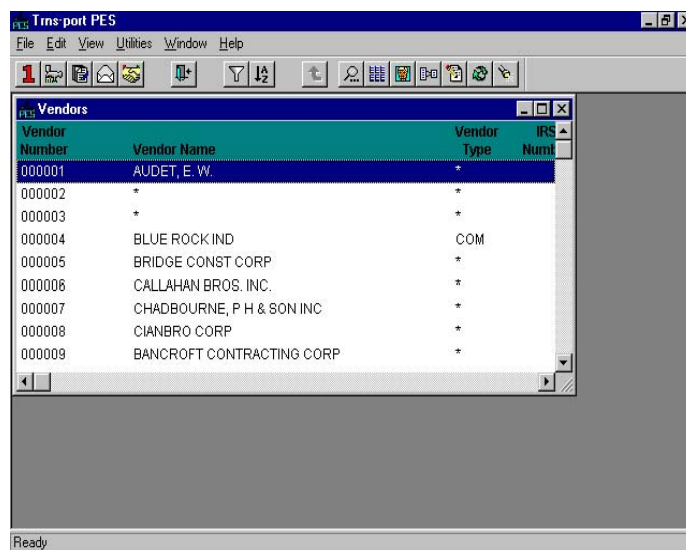
Figure 14-14. Vendors List Window

14.5.1 Adding Vendors

To add information about materials to the Vendor List reference table, press INSERT or select **Add** from the right mouse button menu to display the Add Vendor window (see Figure 14-15).
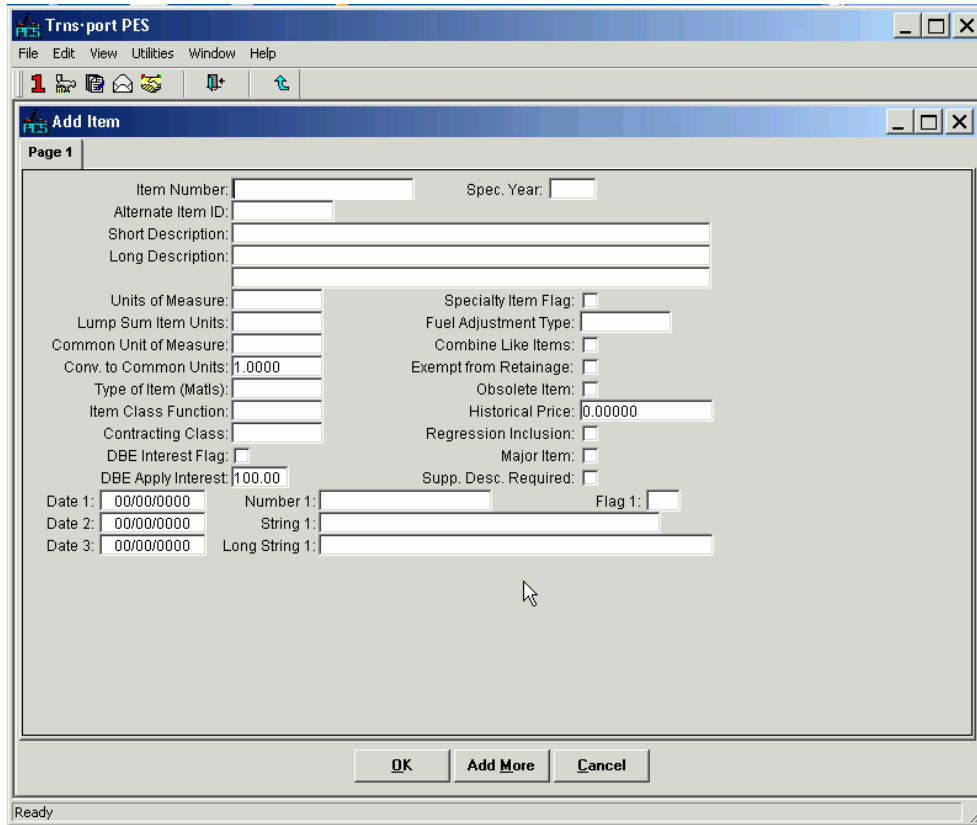
Figure 14-15. Add Vendor Window

To Create a complete record you must enter information in these fields:

Long Name   The vendor name (long description).

Name   The vendor name (short description).

Vendor No. A unique identifier for a vendor.

Vendor   A value, which must be selected from the attached VENDTYP code
Type   table, which indicates the type of vendor.

You are not required to, but you can enter information in these fields to record additional information about a vendor:

Ability Factor	The state's numerical rating of the vendor's capability to perform work. It is a factor in calculating the vendor's capacity; it is not a performance evaluation.
Adjusted Net Worth	The total value of the vendor's assets minus the total value of its debts. This number can represent the agency's estimate, the vendor's claim, or an audit amount.
Alternate Vendor ID	A code that identifies a vendor in some electronic or manual system outside of Trns•port. This value can be used by Trns•port to communicate with that external system.
Alternate Vendor No	An alternate identification number or code for a vendor.

Certification Type	A value, which must be selected from the attached CERTYPE code table, which indicates the type of work a vendor is authorized to perform.
Corporation Type	A value, which must be selected from the attached CORPTYP code table, which identifies the vendor's business structure.
DBE Certification Date	The date on which the vendor was certified for its business enterprise type.
Ethnic Group Type	The ethnic group code to which the Vendor belongs.
IRS Number	The Federal Employer Identification (FEI) number assigned to the vendor by the IRS.
Max Capacity	The maximum amount of work, in dollars, that the vendor can perform.
Obsolete	Indicates that a vendor is obsolete and therefore should no longer be used.
Prequal Certified Date	The date the vendor became qualified to perform the type of work certified for the state.
Prequal Expired Date	The date the vendor's qualification for certification for work expires.
Prequal Update List Date	The date you schedule to review the list of vendors who have pre-qualified.
Primary DBE/WBE Code	A coded value indicating the vendor's business enterprise certification type.
State	The two-letter state code and zip code for the vendor's address.
State of Incorporation	A coded value indicating the state in which the vendor company is incorporated.
Uncompleted Work	The amount of work, in dollars, a vendor has outstanding.

When you finish adding information, click OK to add the vendor or ADD MORE to add another vendor. When you finish adding vendors, Trns•port adds the new vendors to the Vendors list and returns you to the Vendors list window.

14.5.2 Changing Vendor Information

To change information about a vendor, select the vendor record from the Vendors list

window and choose **Change** from the right mouse button menu to display the Vendor window.

You can change any field except the Vendor Number. Click OK to save your changes or CANCEL to return to the Vendors list window.

14.5.3 Deleting Vendor Information

If a vendor is no longer active, you should not delete the vendor record because you will lose all the reference information about the vendor. Instead, make sure the Obsolete box is check in the Vendor record.

14.5.4 Adding Vendor Addresses

To add addresses to new vendor records, select the vendor record from the Vendors list window and click the ADDRESS button to display the Addresses list window (see Figure 14-16).
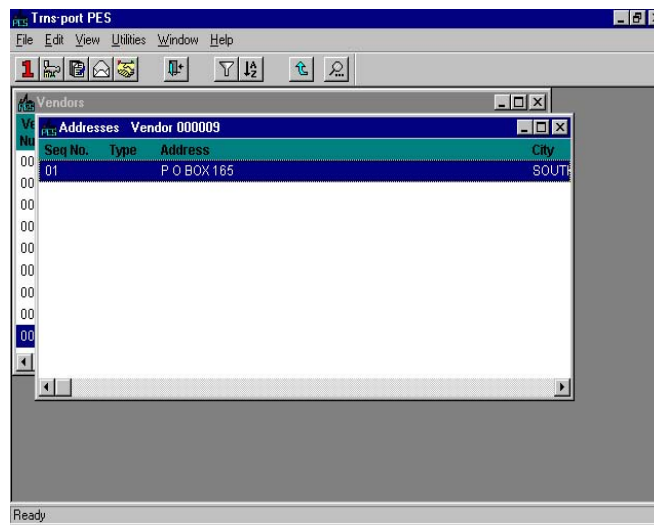
Figure 14-16. Addresses List Window

Press INSERT or choose **Add** from the right mouse button menu to add an address for the selected vendor. Trns•port displays the Add Vendor Address window (see Figure 14-17).
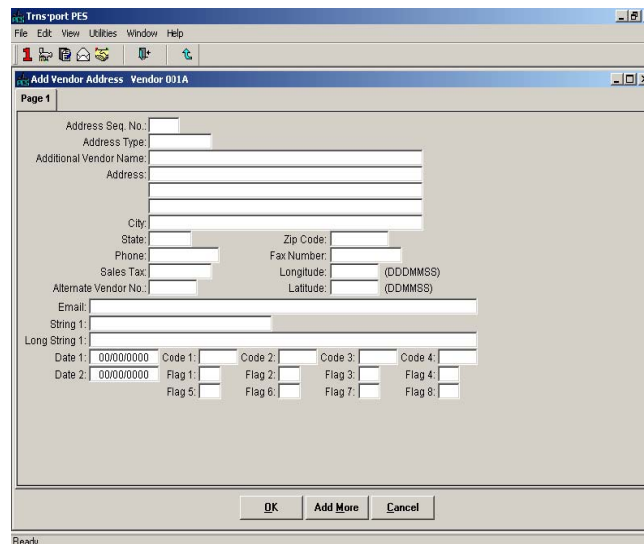
Figure 14-17. Add Vendor Address Window

To create a complete record you must enter information in these fields:

Address	The vendor's address.
Address Seq. No.	A sequential number used to identify one of multiple addresses for a single vendor.
Address Type	A value indicates the type of address for the vendor (for example, billing or shipping) when a vendor has multiple addresses.
City	The vendor's city.
State	The vendor's state address.
ZIP Code	The vendor's zip code.

You are not required to, but you can enter information in these fields to record additional information about a vendor's address:

Additional Vendor Name	A field for an additional name of the vendor.
Fax Number	The fax number for the vendor.
E-mail	The e-mail address for the vendor.
Address Latitude	The latitude on a map of the vendor's address.
Longitude	The longitude on a map of the vendor's address.
Phone	The vendor's phone number.
Phone Number	Phone number for the vendor.
Sales Tax Code	A coded value indicating the sales tax that applies to the vendor.

If you need to add a second address for the same vendor, click ADD MORE and enter another record for the vendor with a different address sequence number. You can keep track of a different vendor numbers by putting it in the Alternate Vendor Number field.

To save your changes and return to the Addresses list window, click OK. If you click CANCEL, Trns•port will not add the address. Click the CLOSE button on the button bar to close the Add Vendor Address window and return to the Vendors list window.

14.5.5 Assigning Work Classifications to Vendors

To assign a work classification to a vendor, select the vendor in the Vendors list window and click the WORKCLASS button. Trns•port displays a Work Classifications list window (see Figure 14-18).
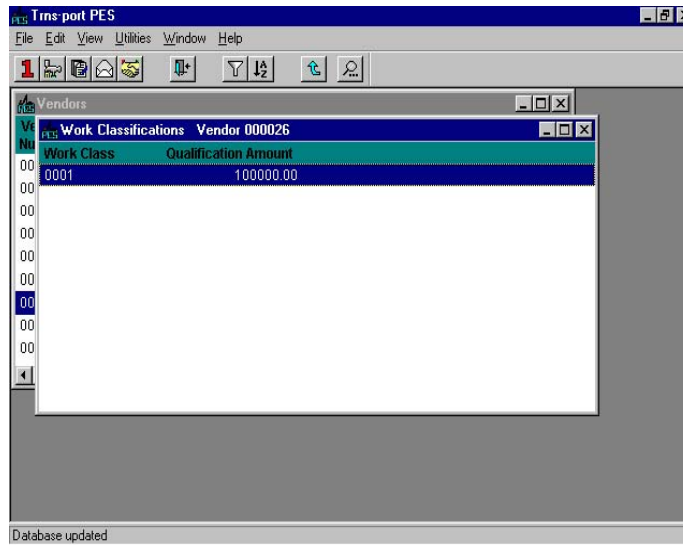
Figure 14-18. Work Classifications List Window

Press INSERT or choose **Add** from the right mouse button menu to display the Add Work Classification window (see Figure 14-19).
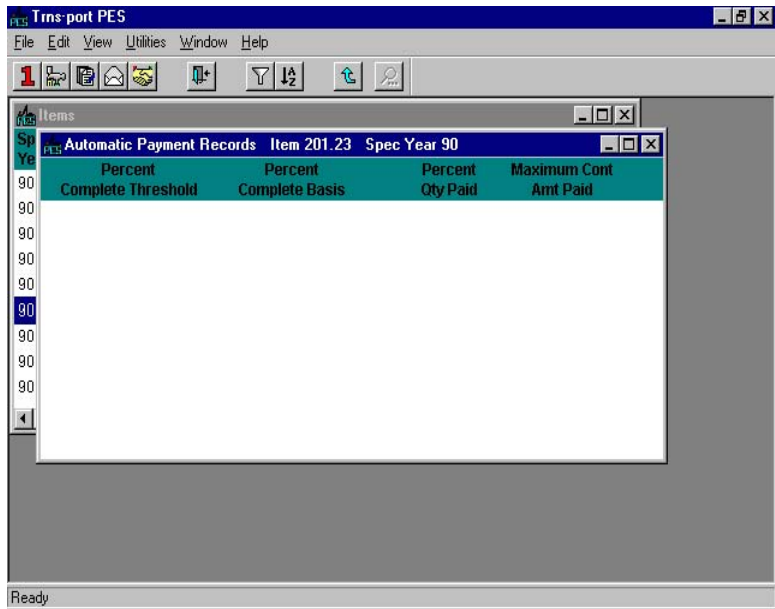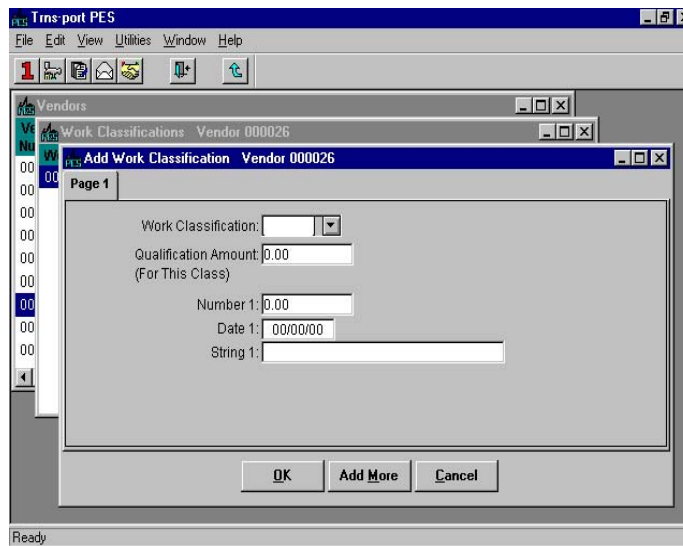

Figure 14-19. Add Work Classification Window

To create a complete record you must enter information in these fields:

Work Classification	A value, which must be selected from the attached VWRKCLS code table, which identifies the classification of work the vendor is qualified to perform.
Qualification Amount (For This Class)	The total dollar value of contracts for which the vendor is qualified to work. Defaults to zero.

If you want to add more than one work classification for this vendor, click ADD MORE. When you finish adding a work classification for this vendor, click OK to return to the Work Classifications list window. Click the CLOSE button on the button bar to close the Add Work Classification window and return to the Vendors list window.

14.5.6 Adding Vendor Insurance

To add vendor insurance information, select the vendor from the Vendors list window and click the INSURE button to display the Insurance Data list window (see Figure 14-20).
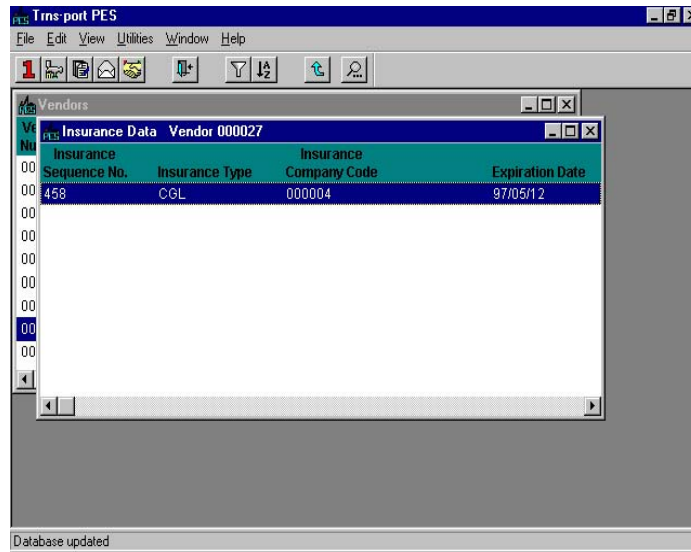
Figure 14-20. Insurance Data List Window

Choose **Add** from the right mouse button menu. Trns•port displays the Add Vendor Insurance window (see Figure 14-21).
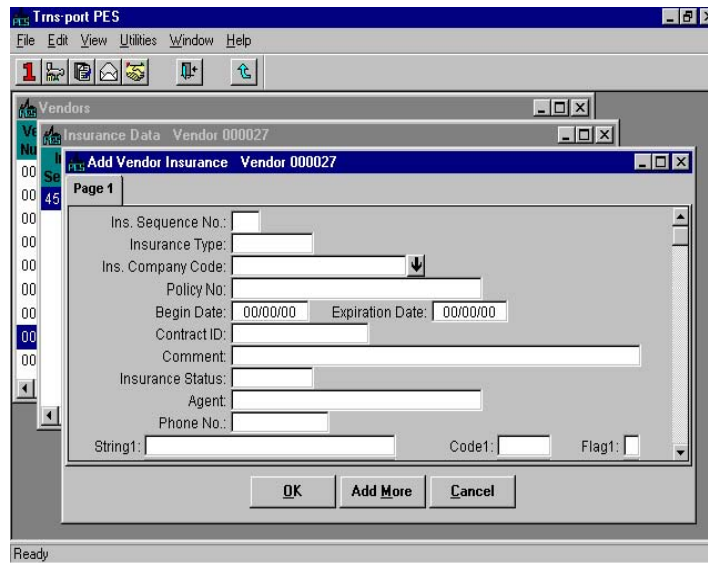
Figure 14-21. Add Vendor Insurance Window

To create a complete record you must enter information in these fields:

Ins. Sequence No.	A sequential number used to identify one of multiple insurance policies for a single vendor.

Insurance Type	A value, which must be selected from the attached INSTYPE code table, that identifies the type of insurance policy; for example, general liability, umbrella, worker's compensation.

You are not required to, but you can enter information in these fields to record additional information about a vendor's insurance:

Agent	Agent who sold the contractor the insurance policy.
Begin Date	Date insurance policy takes effect.
Comment	Space for additional information about the insurance policy.
Company Code	The vendor number of the insurance company underwriting the insurance policy.
Contract ID	A unique identifier for a proposal or contract.
Expiration Date	The date on which the vendor's work certification or insurance policy expires.
Insurance Status	A value, which must be selected from the attached INSSTAT code table, that indicates whether insurance is active, a binder, canceled or expired.
Phone Number	Phone number for agent or insurance company.
Policy No.	Policy number for the contractor's insurance policies

Click OK to save the new insurance information, ADD MORE to add another insurance record for the same vendor, or CANCEL to return to the Insurance list window without adding a record.

14.5.7 List Vendor Insurance Data

You can produce a listing of vendor insurance data, including an Insurance Expiration Letter and an Insurance Updates report.

To generate this information, select **Run Process** from the **File** menu and choose **List Vendor Insurance Data** from the Processes window. Trns•port displays a Confirm Process Submission window.

Click SUBMIT to submit the process, PARAMETERS to change process submission information, or CANCEL to return to the Vendors list window without submitting the process.

14.5.8 Adding Vendor Affiliate Information

To add affiliate information for a vendor, select the vendor from the Vendors list window. Click the AFFILS button to display the Affiliations list window (see Figure 14-22).
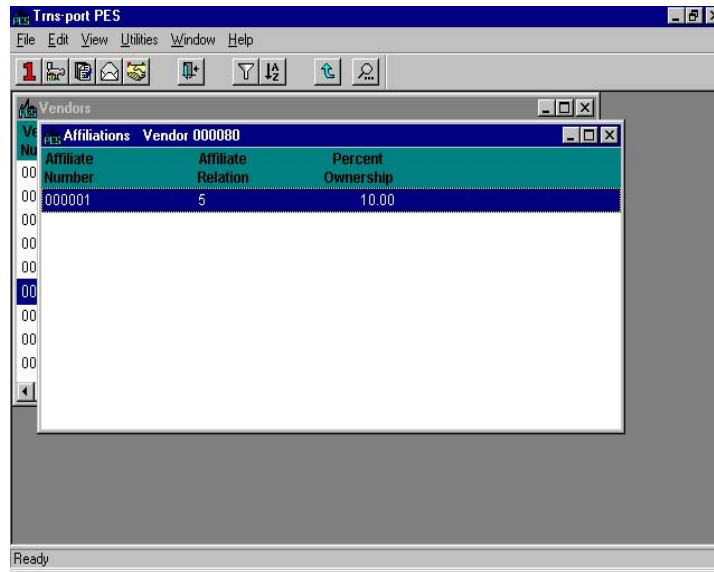
Figure 14-22. Affiliations List Window

Press INSERT or select **Add** from the right mouse button menu to display the Add Affiliate window (see Figure 14-23).
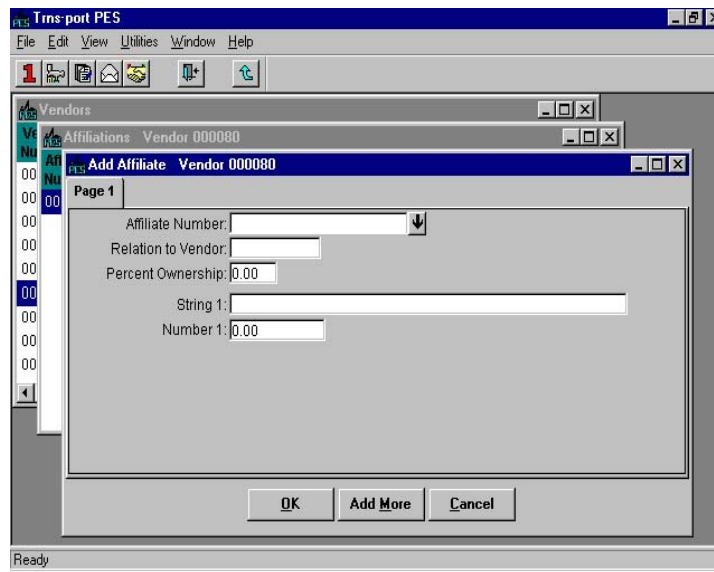
Figure 14-23. Add Affiliate Window

To create a complete record you must enter information in these fields:

Affiliate Number	The name of the vendor associated with another vendor. All references to vendors are validated with the Vendor file.
Relation to Vendor	A value, selected from the attached RELAT code table, which indicates the relationship between a vendor and its affiliate.

You are not required to, but you can enter information in these fields to record additional information about a vendor's affiliates:

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

Click OK to add the affiliate information and return to the Affiliations list window or click ADD MORE to add another affiliate. Click the CLOSE button on the button bar to close the Affiliations list window and return to the Vendors list window.

14.5.9 Adding Officer Information for a Vendor

Officers are persons who are authorized to sign for a contractor. To add officer data for a vendor, select a vendor from the Vendors list window and click the OFFICERS button to display the Officers list window (see Figure 14-24).
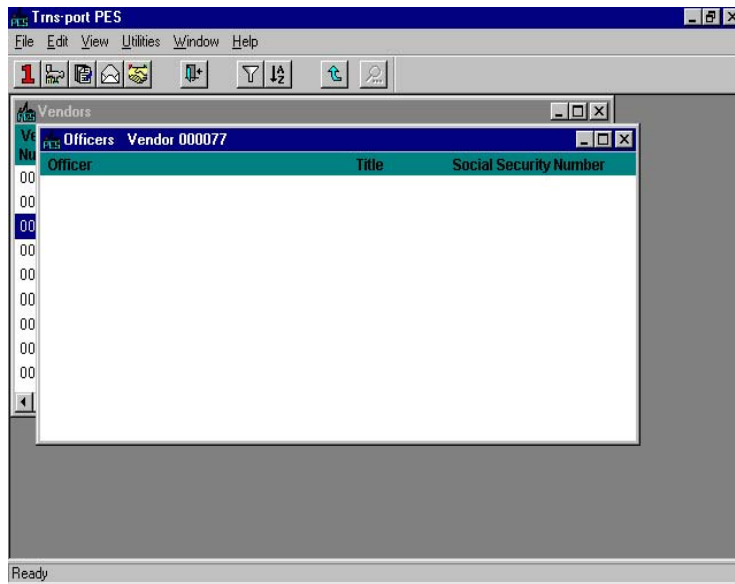
Figure 14-24. Officers List Window

You can add values by pressing INSERT or choosing **Add** from the right mouse button menu. Trns•port displays the Add Officer window (see Figure 14-25).
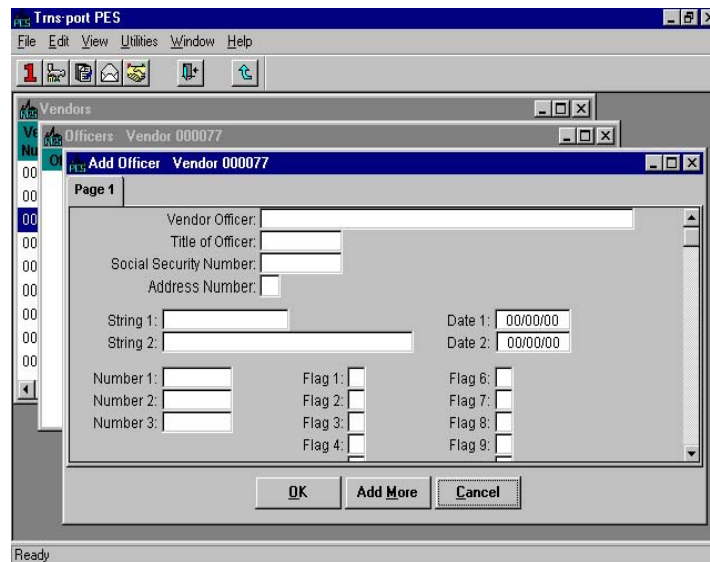
Figure 14-25. Add Officer Window

To create a complete record you must enter information in this field:

Vendor Officer	The name of an officer for a vendor.

You are not required to, but you can enter information in these fields to record additional information about a vendor officers:

Address Seq. No.	A sequential number used to identify one of multiple addresses for a single vendor, which corresponds to the vendor officer's address.
Address Type	A value, which must be selected from the ADDRTYP code table that indicates the type of address for the vendor (for example, billing or shipping) when a vendor has multiple addresses
Officer's Address Number	The vendor address sequence number identifying the vendor officer's address.
Social Security Number	The social security number of the vendor officer.
Title of Officer	The title of a vendor officer.

Click OK to add the officer information and return to the Officers list window or click ADD MORE to add another officer. Click the CLOSE button on the button bar to close the Officers list window and return to the Vendors list window.

14.5.10 Producing a List of Vendors and Vendor Insurance Data Reports

To produce a list of vendors and a list of vendor insurance data, select one or more vendors from the Vendors list window. (You can select more than one vendor by holding down CTRL while you select vendors with the mouse.) Choose **Run Process** from the **File** menu to display the Processes window.

To produce a list of vendors, choose **List Vendors** and click OK to display the Select Vendor Listings window (see Figure 14-26).
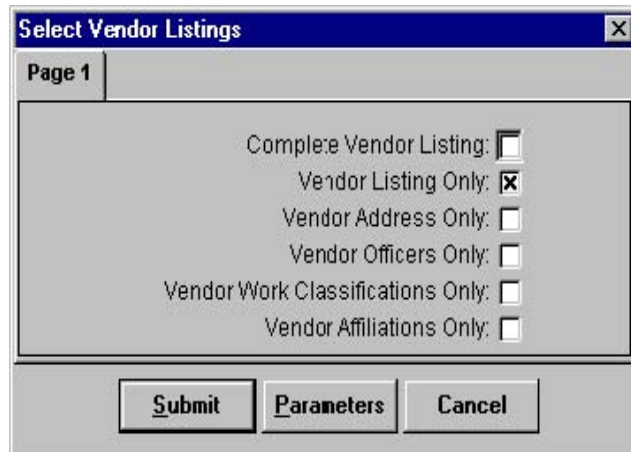
Figure 14-26. Select Vendor Listings Window

Select the parts of the report you want to print by clicking in the boxes. Then click SUBMIT to submit the process, PARAMETERS to change process submission information, or CANCEL to return to the Vendors list window without submitting the process.

To produce a list of vendor insurance data, select **List Vendor Insurance** from the Processes window as described above.

14.5.11 Producing an Alphabetized List of Vendors

To produce an alphabetized list of vendors, select the vendors you want listed in the report from the Vendors list window. (You can select more than one vendor by holding down CTRL while you select vendors with the mouse.) Choose **Run Process** from the **File** menu to display the Processes window.

Choose **List of Alphabetized Vendors** and click OK to submit the batch process.

14.5.12 Generating Vendor Mailing Labels

To generate mailing labels, select one or more vendors from the Vendors list window. To produce a list of vendors, choose **List Vendors** and click OK to display the Select Vendor Listings window.

Select the vendors for which you want mailing labels generated. (You can select more than one vendor by holding down CTRL while you select vendors with the mouse.) Then choose **Run Process** from the right mouse button menu to display the Processes window.

Choose Generate Vendor Mailing Labels from the Processes window. Trns•port displays the Mailing Label Parameters window (see Figure 14-27).
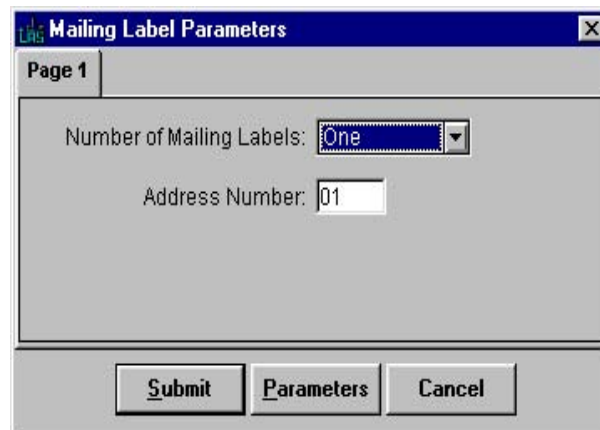
Figure 14-27. Mailing Label Parameters Window

Enter the number of labels you want generated for each vendor (1,2,3 or a whole page) and the address number to be used in the labels (the default is "01"). Then click SUBMIT to submit the process, PARAMETERS to change process submission information, or CANCEL to return to the Vendors list window without submitting the process.

14.6 Price Index List

If you choose **Price Index List** from the **Reference Tables** menu, Trns•port displays the Price Indices list window (see Figure 14-28).
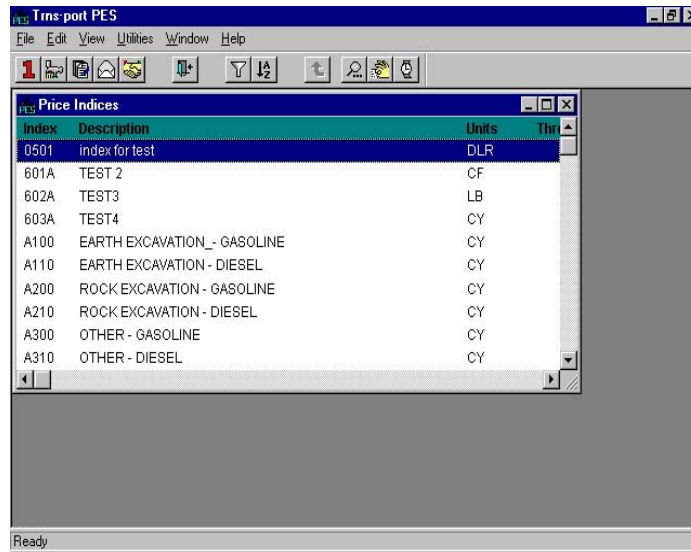
Figure 14-28. Price Indices List Window

14.6.1 Adding a Price Index

To add a new price index, press INSERT or choose **Add** from the right mouse button menu. Trns•port displays the Add Price Index window (see Figure 14-29).
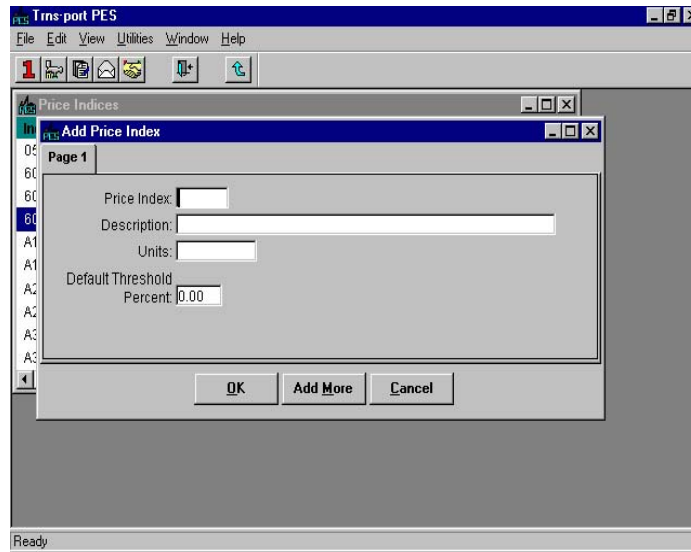
Figure 14-29. Add Price Index Window

To create a complete record you must enter information in these fields:

Description	A short description of the price index.
Price Index Unit	A value, which you must select from the attached list, that indicates Trns•port should automatically adjust item prices for inflation according to the index. Choose from the attached drop-down list.

When you finish adding information, click OK to save the record, ADD MORE to add another price index, or CANCEL to return to the Price Indices list window without saving.

14.6.2 Changing a Price Index

To change an existing record, select the record in the Price Indices list window and click the PRCIDX button or choose **Price Index** from the right mouse button menu. Trns•port displays a Price Index window (see Figure 14-30).
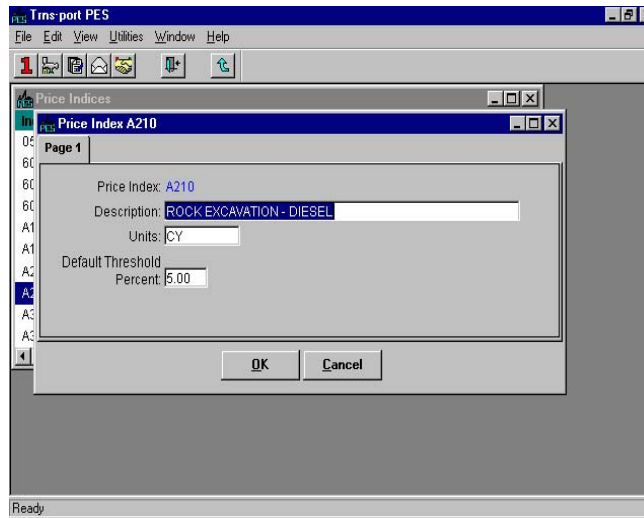
Figure 14-30. Price Index Window

You can change information in any field except the Price Index field. When you finish making changes, click OK to save the changes or CANCEL to return to the Price Indices list window without saving.

14.6.3 Deleting a Price Index

To delete a price index, select the record in the Price Indices list window and select **Delete** from the right mouse button menu. Trns•port displays a series of delete warning windows. Click YES in each of the windows if you are sure you want to delete the record.

14.6.4 Adding Item Price Index Adjustments

To add item price index adjustments, select a price index from the Price Indices list window and click the IDXADJ button or choose **Price Index Adjustment List** from the right mouse button menu. Trns•port displays the Item Price Index Adjustments list window (see Figure 14-31).
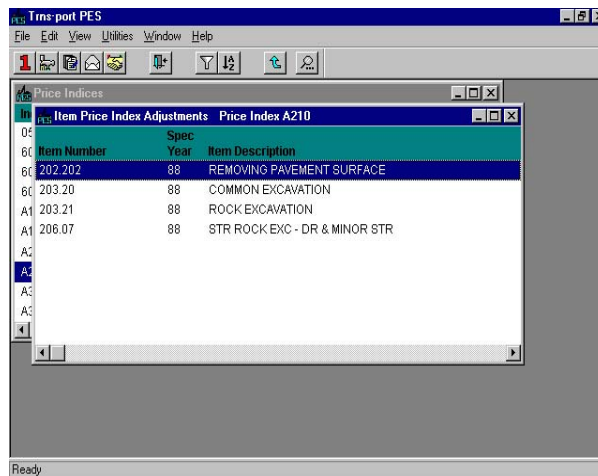
Figure 14-31. Item Price Index Adjustments List Window

To add an item price index adjustment, press INSERT or choose **Add** from the right mouse button menu. Trns•port displays the Add Price Index Adjustment window (see Figure 14-32).
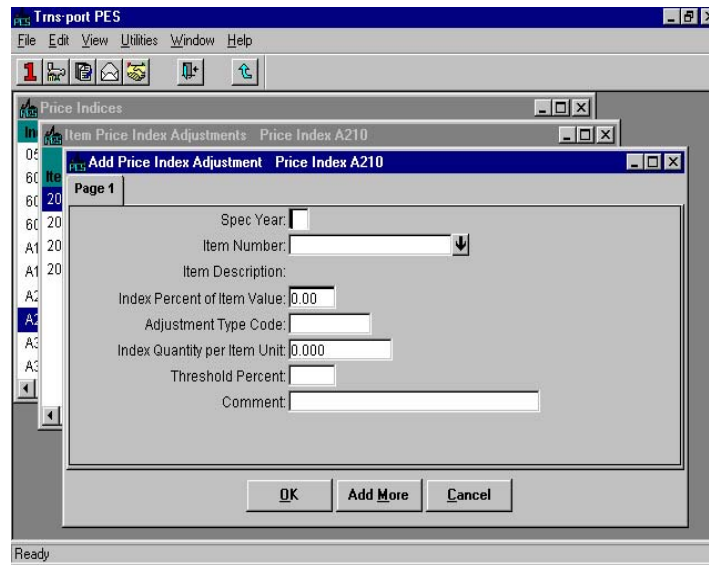
Figure 14-32. Add Price Index Adjustment Window

To create a complete record you must enter information in these fields:

Spec Year	This field tells which specification year's item list is to be used for this particular item and is vital to Trns•port processing. All items within a single project must have the same spec year and must match the spec year for the project.
Item Number	The number used in your agency's documents to identify a particular item.
Index Percent of Item Value	A method of expressing the relationship of the item to the index. This value is the percentage of the item (in terms of its value) that the index affects. For example, if 25 percent of an item is gas, and this were a gas adjustment index, a value of 25.00 would be entered.
Adjustment Type Code	A coded value representing the kind of price adjustment applied to the item.
Index Quantity Per Item Unit	Another method of expressing the relationship of the item to the index. This value is the number of units of the index per units of the item. In the example used above for the Index Percent of Item Value field, one unit of gas would be used for every four units of the item.

Threshold Percent	If the percentage change between the adjustment payment for the item and the original price of the item is less than or equal to this value, then no adjustment is made in the payment process. The percentage difference between the original item cost and the adjusted cost must be greater than this threshold percent to take the index into account. The default Threshold Percent is none.
Comment	A short description or comment about the particular index.

When you finish adding information, click OK to save the record, ADD MORE to add another record, or CANCEL to return to the Item Price Index Adjustments list window without saving.

14.6.5 Changing Item Price Index Adjustments

To change information, select an item price index adjustment and click the IDXADJ button or choose **Item Price Index Adjustment** from the right mouse button menu. Trns•port displays the Adjustment window.

You can change information in any fields except Spec Year, Item Number, or Item Description. When you finish making changes, click OK to save your changes or CANCEL to return to the Item Price Index Adjustments window without saving.

14.6.6 Deleting Item Price Index Adjustments

To delete a price index adjustment, select the record in the Item Price Index Adjustments list window and select **Delete** from the right mouse button menu. Trns•port displays a series of delete warning windows. Click YES in each of the windows if you are sure you want to delete the record.

14.6.7 Adding Price Index Histories

To work with price index histories, select a price index from the Price Indices list window and click the HISTORY button or choose **Price Index History List** from the right mouse button menu. Trns•port displays the Price Index Histories list window (see Figure 14-33).
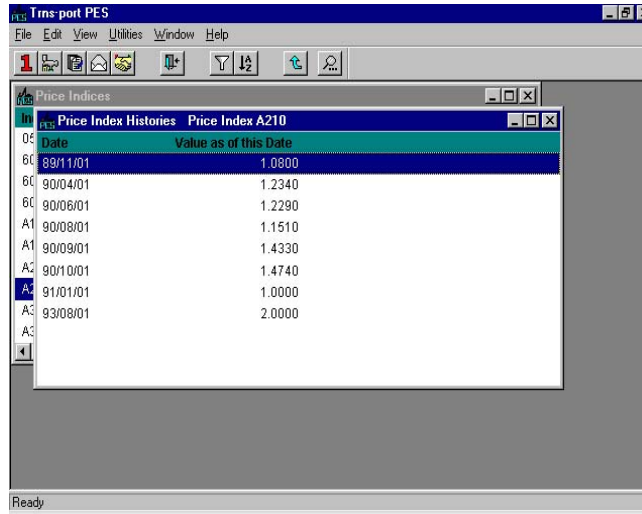
Figure 14-33. Price Index Histories List Window

To add a price index history, press INSERT or choose **Add** from the right mouse button menu. Trns•port displays the Add Price Index History window (see Figure 14-34).
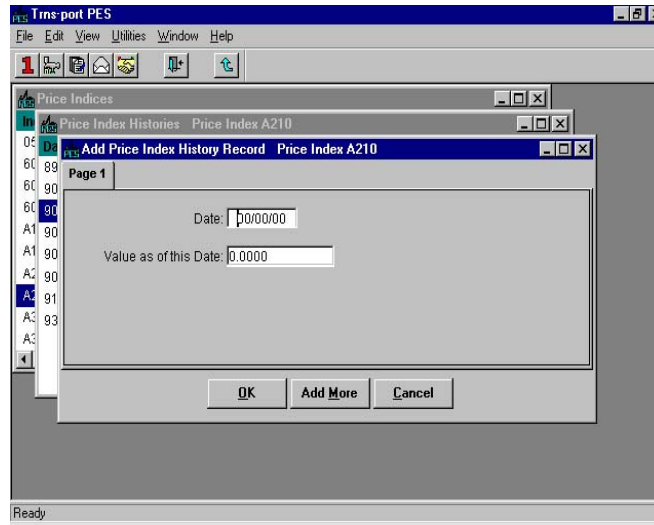
Figure 14-34. Add Price Index History Window

To create a complete record you must enter information in these fields:

Date	The date the index becomes effective. If the payment of the item is prior to this date, no adjustment will be made. The date and time will automatically be entered into Trns•port.
Value as of this Date	The price of the item as of the date stated. This value will be used based on the payment date and the value associated with the item at that time.

Click OK to save the index history, ADD MORE to add another record, or CANCEL to return to the Price Index Histories list window without adding a record.

14.6.8 Changing Price Index Histories

To change an existing price index history record, select the record from the Price Index Histories list window and click the HISTORY button or choose **Price Index History Record** from the right mouse button menu. Trns•port displays a History Record window.

You can only change the Value as of this Date field. When you finish making changes, click OK to save the changes or CANCEL to return to the Price Index Histories list window without saving.

14.6.9 Deleting Price Index Histories

To delete a price index history, select the record in the Price Index Histories list window and select **Delete** from the right mouse button menu. Trns•port displays a series of delete warning windows. Click YES in each of the windows if you are sure you want to delete the record.

14.6.10 Producing A Price Indices List

To produce a Price Indices report listing, select the price index or indexes for which you want to generate the listing. Choose **Run Process** from the right mouse button menu to display a Processes window.

Select **List Price Indices** and click OK to run a process and print the listing.

14.7 Special Provisions List

If you choose **Special Provisions List** from the **Reference Tables** menu, Trns•port displays the Special Provisions list window (see Figure 14-35).
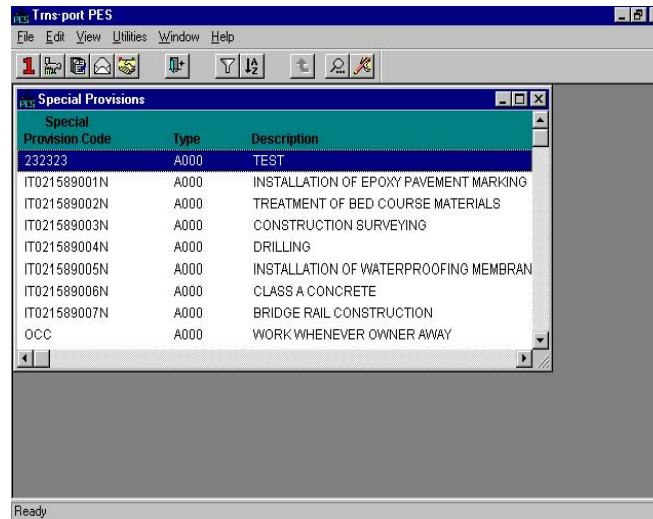
Figure 14-35. Special Provisions List Window

    📄 **Note:** Currently NJ does not use Special Provisions. The information here is meant for reference only.

14.7.1 Adding a Special Provision

To add a special provision to the reference table, press INSERT or choose **Add** from the right mouse button menu. Trns•port displays the Add Special Provision window (see Figure 14-36).
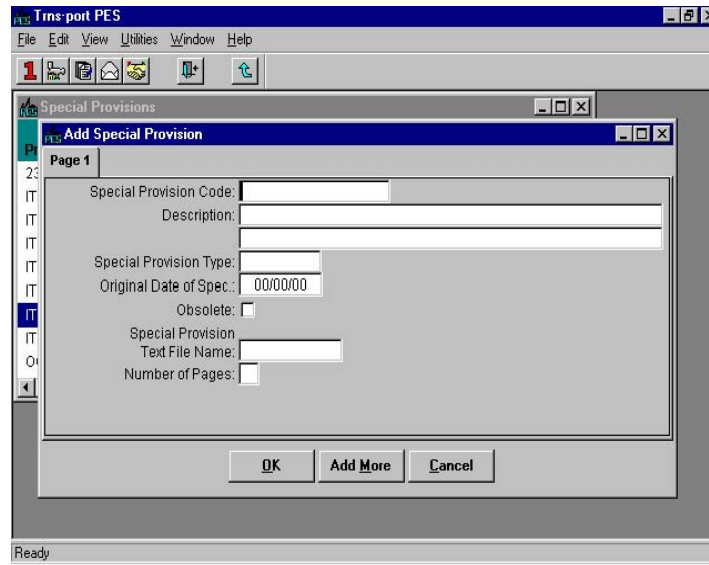
Figure 14-36. Add Special Provision Window

To create a complete record you must enter information in these fields:

Description	A short description of the special provision.
Special Provision Code	A unique identifier for a special provision.
Special Provision Type	A coded value indicating the type of special provision.

You are not required to, but you can enter information in these fields to record additional information about a special provision:

Number of Pages	The number of pages of the special provision.
Obsolete	Indicates whether the special provision is in effect or obsolete.
Original Date of Specification	The date a special provision is effective.
Special Provision Text File Name	A field that identifies the library member of which the special provision is a part.

When you finish adding information, click OK to save the new special provision, ADD MORE to add another record, or CANCEL to return to the Special Provision list window without saving.

14.7.2 Changing Special Provisions

To change a special provision record, select the record from the Special Provision list window and click the SPECPROV button or choose **Special Provision** from the right mouse button menu.

Click CHANGE to begin changing information. You can change information in any field

except the Special Provision Code field. When you finish making changes, click OK to save the changes or CANCEL to return to the Special Provisions list window without saving.

14.7.3 Deleting Special Provisions

To delete a special provision, select the record in the special Provisions list window and select **Delete** from the right mouse button menu. Trns•port displays a series of delete warning windows. Click YES in each of the windows if you are sure you want to delete the record.

14.7.4 Adding or Changing the Long Description

To add or change special provision text, select a special provision from the Special Provisions list window and click the TEXT button or choose **Special Provision Text** from the right mouse button menu. Trns•port displays a Long Description window (see Figure 14-37).
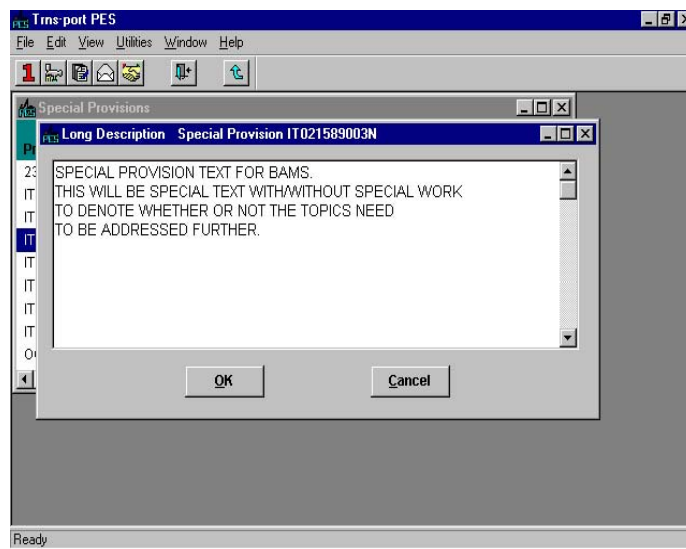
Figure 14-37. Long Description Window

You can click anywhere in the window to begin typing in new information. To change existing text, drag over it to select it and begin typing. Text will wrap automatically at the end of each line. If you want to begin typing a new paragraph, press ENTER.

When you finish changing the text, click OK to save the changes or CANCEL to return to the Special Provisions list window without saving.

14.7.5 Producing a Special Provisions List

To produce the Special Provisions report listing, select the provision or provisions for which you want to generate the listing. Choose **Run Process** from the right mouse button menu to display a Processes window.

Select **Special Provisions** and click OK to run a process and print the listing.

14.8 Code Table List

Only authorized staff will be able to add and change code table information. If you are authorized to change code tables and you choose **Code Table List** from **the Reference Tables** menu, Trns•port displays the Code Tables list window (see Figure 14-38).
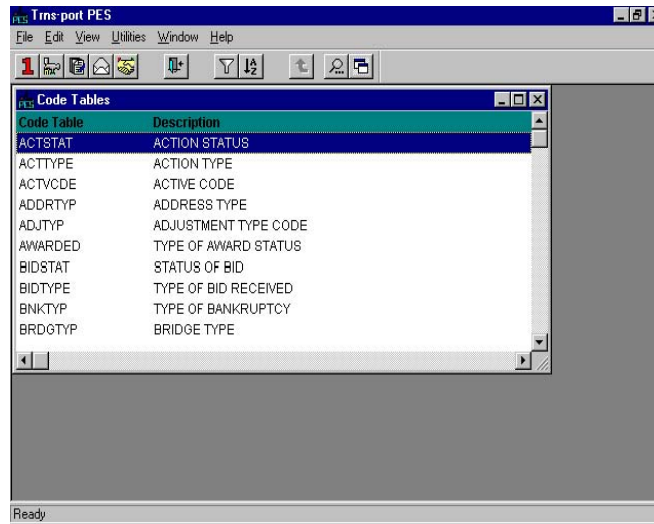
Figure 14-38. Code Tables List Window

14.8.1 Adding a Code Table

To add a code table, press INSERT or choose **Add** from the right mouse button menu. Trns•port displays the Add Code Table window (see Figure 14-39).
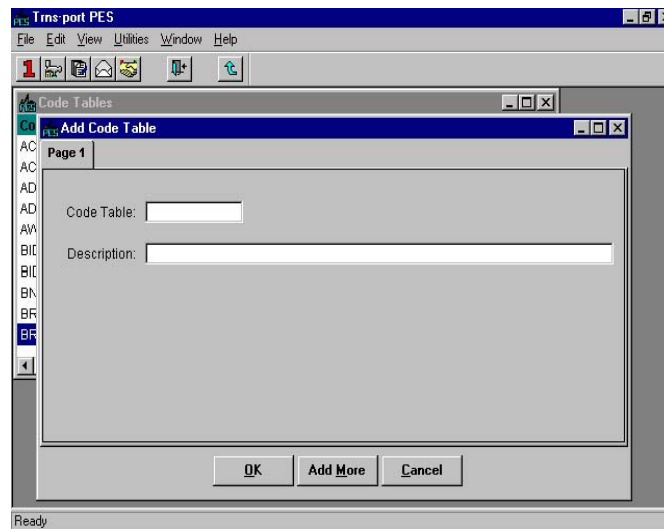

Figure 14-39. Add Code Table Window

To create a complete record you must enter information in these fields:

Code Table	A unique identifier of the code table that contains the code values and descriptions within this code table.
Description	A forty-character field containing the long description of the code value.

Click OK to save the record, ADD MORE to add another code table, or CANCEL to return to the Code Tables list window without saving.

14.8.2 Changing a Code Table

To change a code table record in the reference table, select a code table from the Code Tables list window and click the CODETBL button or choose **Change** from the right mouse

button menu. Trns•port displays a Code Table window.

Click the CHANGE button to make changes. You can change the description, but not the Code Table field. When you finish changing the description, click OK to save the changes or CANCEL to return to the Code Tables list window without making changes.

14.8.3 Deleting a Code Table

To delete a code table, select the record in the Code Table list window and select **Delete** from the right mouse button menu. Trns•port displays a series of delete warning windows. Click YES in each of the windows if you are sure you want to delete the record.

14.8.4 Adding a Code Table Entry

To add an entry in a code table, select the code table from the Code Tables list window and click the ENTRY button. (You can also select **Code Table Entries** from the right mouse button menu.) Trns•port displays an Entries list window (see Figure 14-40).
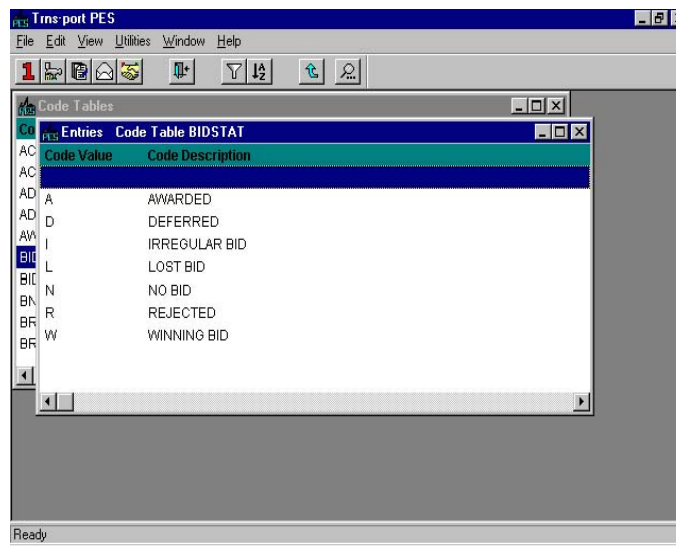
Figure 14-40. Entries List Window

To add an entry, press INSERT or choose **Add** from the right mouse button menu. Trns•port displays the Add Entry window (see Figure 14-41).
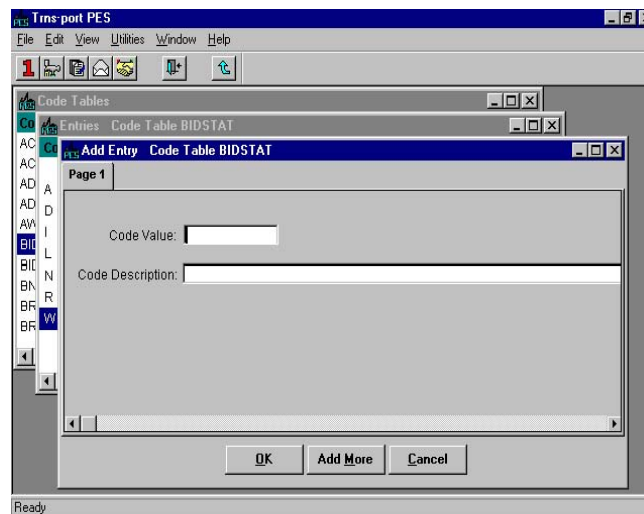

Figure 14-41. Add Entry Window

To create a complete record you must enter information in these fields:

Code Value	A four-character identifier of the longer description. This field can be either numeric or alphabetic, and uniquely identifies the code entry.
Code Description	A forty-character field containing the long description of the code value.

When you finish adding information, click OK to add a new code table entry, ADD MORE to add another record, or CANCEL to return to the Code Tables list window without adding a record.

14.8.5 Changing a Code Table Entry

To change an entry in a code table, select the code table from the Code Tables list window and click the ENTRY button. (You can also select **Code Table Entries** from the right mouse button menu.) Trns•port displays the Entries list window.

Choose **Change** from the right mouse button menu. Trns•port displays an Entry window.

You cannot change the Code Value field. Click OK when you finish adding information. Click ADD MORE to add another entry or CANCEL to return to the Entries list window without changing an entry.

14.8.6 Deleting a Code Table Entry

To delete a code table entry, select the record in the Entries list window and select **Delete** from the right mouse button menu. Trns•port displays a series of delete warning windows. Click YES in each of the windows if you are sure you want to delete the record.

14.8.7 Producing a Code Tables List

To produce a code tables report listing, select the code table or code tables you want to list in the Code Tables list window and choose **Run Process** from the right mouse button menu to display a Processes window.

Select **List Code Tables** and click OK to run a process to print the listing.

Appendix A. Contract and Project Work Types Contract Classification

Frequently, highway construction projects and contracts are classified into general classifications such as new construction, rehabilitation, widening, preventative maintenance, etc. While these improvement type classifications are important for program budgeting and reporting purposes, they are limited for the purpose of classifying contracts based on task functionality. For example, some widening jobs are heavy on asphalt items while others are heavy on earthwork, drainage and/or concrete items. Better functional classification of contracts allows more accurate market determination, which will improve the State's ability to examine competition and bidding issues using the BAMS/DSS system. From an estimating perspective, work type (and major item) classifications can be used effectively to improve project cost estimation using CES and/or Trns•port Estimator$^{®}$.

A recommended list of contract work types is provided in the following table. Using these functional work types allows for better identification and grouping of like contracts for the purpose of determining and analyzing the markets where like contractors interact for various contracting functions (e.g. asphalt, earthwork, structures). Also, since Trns•port BAMS/DSS$^{®}$ is the source for historical bid prices, consistent use of work type and item classifications across all Trns•port modules facilitates enhanced bid-based pricing for cost estimating.

The Job Work Type variable (JOB.jobworktype) in CES, which corresponds to the Contract Work Type variable (DPROPOSL.cnprpwrk) in BAMS/DSS, can be used to store the functional classification.

The general construction classifications (new construction, widening and resurfacing, etc.) should also be entered for each project. For example, the Job Type variable (JOB.jobtype) in CES can be used to store these improvement type classifications.

To a large extent, the functional classification of contracts is a subjective process that requires the exercise of judgment. Generally, we can classify the contracts according to what functions are likely to control the award of the job as measured by the major item dollar percentages. Absent special circumstances, such as a high degree of specialty work or lump sum items, a major item concentration of *35 percent or greater* is usually considered as determinative of work type classification. Many contracts will not fall neatly into any particular category, with the dollars evenly divided across more than one major item. In such cases, a General Construction work type code may be appropriate.

In practice, contract work types initially assigned in CES can be reviewed and revised later when the detailed line items have been fully specified for the

project. For example, when the data is finally passed to BAMS/DSS, work type coding can be re-evaluated for data analysis purposes using the Contract Profile Ad Hoc program that summarizes the contract dollar percentages by item classification.

Table A-1. NJDOT Project and Contract Work Types

Work Type Code	Work Type Classification Description	Examples
ASPH	Primarily asphalt work. Typically over 35 percent asphalt item dollars.	NEW CONSTRUCTION RESURFACING RECONSTRUCTION BITUMINOUS PAVEMENT
BRPT	Bridge painting and cleaning	BRIDGE PAINTING BRIDGE CLEANING
CONC	Primarily Portland cement concrete work	CONCRETE PAVEMENT
CURB	Curbs, sidewalks, and gutters	CURB & GUTTER
DRNG	Drainage work and Erosion control Drainage projects are those involving primarily the non-incidental improvement to drainage or erosion control. Drainage projects may include the installation/rebuilding of box culverts, ditches, inlets, gutters, and/or piping structures. Erosion control may include the installation of rip rap, wire mesh netting, construction of sediment ponds, slope stabilization, retaining walls, etc.	CULVERTS DITCHES DRAINAGE EROSION CONTROL
ERTH	Earthwork	EARTHWORK EXCAVATION GRADING
FENC	Fencing	FENCES GATES
GDRL	Guiderail Guiderail refers to the non-incidental installation of guiderail upon an existing facility. Installation of guiderail should be the primary activity related to contracts of this classification.	GUIDERAIL MEDIAN CROSSOVER PROTECTION
GENC	General construction Typically 20 percent or more individually allocated to paving (asphalt or concrete), earthwork (and/or drainage), and structures.	

Work Type Code	Work Type Classification Description	Examples
INTC	Interchange Interchange work includes new interchange construction and the reconstruction or widening of an existing interchange. New interchange projects involve the construction of a new facility or structure that allows the junction of highways, usually on different levels – thereby permitting traffic to move from one to another without crossing traffic streams. The facility construction includes the connected entrance and exit ramps. Interchange projects will be of varying complexity and widely varying cost depending on the nature and location of the conjoining roadways and the nature of the improvement. Typical interchange projects include improvements made to "diamond" and "at-grade" interchanges, while complex interchange projects include improvements made to cloverleaf interchanges and interchanges at the junction of two interstate highways, and the like.	INTERCHANGE
ITS	Intelligent Transportation Systems	ITS FACILITIES CCTV TRAFFIC MONITORING
JNTS	Joints	PAVEMENT CRACK SEAL JOINT REPAIR
LAND	Landscaping	LANDSCAPING MOWING
LTNG	Lighting	LIGHTING RELAMPING
MISC	Miscellaneous Includes non-incidental specialty work in separate contracts not covered by another work type classification.	EMERGENCY STANDBY MACHINE SWEEPING NOISE BARRIERS PAVEMENT CLEANING REST AREAS
PVMK	Pavement marking	PAVEMENT MARKING
RMVL	Removal of buildings	DEMOLITION OF BUILDINGS
SGNL	Signals Non-incidental improvements to signalization at	TRAFFIC SIGNALS

Work Type Code	Work Type Classification Description	Examples
	intersections.	
SIGN	Signs Non-incidental improvements to signing.	SIGNING
SRFP	Surface prep	MILLING RUMBLE STRIPS
STRL	Structures – large Typically over $500,000, but more importantly bid on by large structures contractors.	BRIDGE REPAIR/REHAB BRIDGE RECONSTRUCTION
STRS	Structures – small Typically under $500,000, but more importantly bid on by small structures contractors.	BRIDGE REPAIR/REHAB
UTIL	Utility work Includes potable water, gas mains, telephone and electric utility work.	UTILITIES

Appendix B. NJDOT Project/Job/Proposal Construction Classifications

Table B-1. NJDOT Project/Job/Proposal Construction Classifications

Type	Description
1. New Construction	New construction or major reconstruction of divided or undivided highways. Includes all major phases of construction site preparation, earthwork, drainage, structures, paving, etc. whether contracted separately or as a complete project. Minor items such as signing, landscaping and guiderail are included unless they are in separate specialty contracts. If Maintenance of Traffic will include two or more stages or if extensive Maintenance of Traffic equipment is needed, use Class 2.
2. Reconstruction, Widening and Dualization	The removal and replacement, rebuilding or upgrading of an existing facility, including intersections. There may be grade changes but normally the changes will not be significant. Includes all phases of construction. May include short utility relocations, placement and/or relocations of Intelligent Transportation Systems (ITS) facilities. Includes widening equivalent to one lane width or wider. Includes structures when decks are replaced on existing substructures or decks are widened and substructures extended. Includes intersection improvements when roadway area is also rebuilt.
3. Widening and Resurfacing	Widening and resurfacing of existing highway facilities when the total added width is equivalent to less than one lane width in each direction and grades are not changed. Includes minor grading, extending culverts, curb and gutter, etc. Includes bridge deck widening possibly without substructure changes. May require relocations of ITS facilities.

Type	Description
4. Resurfacing	Overlaying existing highways, and surfacing or overlaying existing shoulders with asphaltic material. Includes joint repair, minor widening with asphaltic materials, some base corrections or asphaltic base, curb and gutter replacement, and adjustments at structures, drives and street returns. Does not include extensive reconstruction, pavement replacement or construction of new pavements, excavation, utility or sewer work. Projects with milling operations may involve reconstruction of ITS device pavement sensors.
5. Bridge Repair	Repair of bridges, includes repairs to decks, curbs, rails, beams and structures. If total deck removal and replacement is required, the contract should be classified as reconstruction. Bridge Repair also includes bridge painting, which consists of the removal of lead based paint and the application of a high performance coating system.
6. Intersection Improvements	Minor construction or reconstruction of street or highway intersections. Normally includes some removal, grading, drainage and paving. May include curb and sidewalk along with traffic signals installed at the intersection. If intersection pavement is to be rebuilt, the contract should be classified as reconstruction.
7. Electrical, Safety, and Traffic Control	Placement, replacement and betterment of guiderail, signs, striping, traffic signals, highway lighting, sign lighting, electrical signs, movable bridge electrical systems and other safety and traffic control devices, along streets and highways, when let on a specialty contract basis. If electrical, safety and traffic control devices are included as part of a major contract type, they should be included under the miscellaneous activities for that type.
8. Miscellaneous	Construction activities, let on a specialty contract basis, not assignable to other work classes. Includes demolition of buildings, removal of asbestos, and railroad pavement painting.

Type	Description
9. Unique	Construction activities of a distinctive nature, which is let on a specialty contract basis. Includes wetland replacement and restoration.
10. Intelligent Transportation Systems (ITS)	Construction of ITS devices and communication networks. Systems include computerized traffic signal control, dynamic message signs, closed circuit television, highway advisory radio, fiber optics and wireless technologies, traffic detection, weather station and data development traffic monitoring. Includes the integration of proposed devices with Traffic Operation Centers central control systems and interagency resource sharing through the regional and statewide ITS Architectures. If ITS systems are included as part of a major contract type, they should be included under the miscellaneous activities for that type.
11. Landscape	Design and installation of landscape architectural elements to enhance transportation facilities or to mitigate environmental and negative effects caused by transportation facility improvements. Work includes functional, aesthetic and safety plantings, reforestation, wetland mitigation, urban streetscapes, bicycle and pedestrian improvements, and structures aesthetics. This work may be part of other contracts or as independent contracts.
12. Demolition	Advanced Demolition of Buildings - the demolition and removal of buildings and appurtenances within acquired ROW, in advance of the main construction contract. Clearing Site, Underground Storage Tank Removal, Sealing of Abandoned Wells, and Asbestos Remediation could be included in this type of project.
13. Drainage	Includes cleaning, inspecting, capacity restoration and in-kind repairs to highway drainage facilities.

Appendix C. Sample Output and Explanations of Weighted Averages and Regression Analysis

Generate Project-Level Bid-Based Prices (PESGBBP)

The Generate Project-Level Bid-Based Prices report lists the estimated historical price for every item number in the project or proposal selected by using either regression or weighted averages that are based on data generated by the Trns•port BAMS/DSS PEMETH and COMBID models and found in the Trns•port BAMS/DSS BIDHIST file. Further details are provided on the pages following the sample printouts below.

```
                              STATE DEPARTMENT OF TRANSPORTATION                           PAGE 1
                                                                               PRINTED 06/27/96
                                 GENERATE BID BASED PRICES
-----------------------------------------------------------------------------------------------
        PROJECT NO: 21766A        AREA: -1  COUNTY:            PROPOSED LETTING DATE:  06/27/96

        PROJECT DESCRIPTION: SOUND BARRIER                         WORK TYPE:  2
-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2017002

       NOT ESTIMATED, THE QUANTITY LEVEL FOR THE ITEM IS 5

-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2017012

       NOT ESTIMATED, THE QUANTITY LEVEL FOR THE ITEM IS 5

-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2017040

       NOT ESTIMATED, NO BID HISTORY FOR ITEM

-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2030001                 ESTIMATION IS BASED ON REGRESSION

                             UNIT PRICE  =  EXP  (
                                               0.6218                         BASED VALUE
                                  +        379.4959 * 960627  /  1000000      LETTING DATE
                                  +         -0.1432 *  LOG  (
                                                              50.000
                                                                  )          QUANTITY
                                  +          0.0000                          AREA          -1
                                  +          0.0722                          SEASON         2
                                  +          0.5324                )         WORK TYPE      2
     ESTIMATED PRICE: $       306.04740

-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2030002

       NOT ESTIMATED, NO BID HISTORY FOR ITEM

-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2030003                 ESTIMATION IS BASED ON WEIGHTED AVERAGES

                       * TH PERCENTILE            ITEM            * TH PERCENTILE
                           QUANTITY             QUANTITY             QUANTITY
                              *        <=           2.000     <        *

              BEST MATCHING AVERAGE: $      605.08000 QUANTITY LEVEL: *   WORK TYPE: *     AREA: *
     ESTIMATED PRICE: $       605.08000
```

```
                              STATE DEPARTMENT OF TRANSPORTATION                          PAGE 2
                                                                                  PRINTED 06/27/96
                                   GENERATE BID BASED PRICES
-----------------------------------------------------------------------------------------------
         PROJECT NO: 21766A        AREA: -1  COUNTY:              PROPOSED LETTING DATE:  06/27/96

         PROJECT DESCRIPTION: SOUND BARRIER                       WORK TYPE:  2
-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2037001

       NOT ESTIMATED, NO BID HISTORY FOR ITEM
-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2037050

       NOT ESTIMATED, THE QUANTITY LEVEL FOR THE ITEM IS 5
-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2037050

       NOT ESTIMATED, THE QUANTITY LEVEL FOR THE ITEM IS 5
-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2037050

       NOT ESTIMATED, THE QUANTITY LEVEL FOR THE ITEM IS 0
-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2070005                   ESTIMATION IS BASED ON WEIGHTED AVERAGES

                          * TH PERCENTILE          ITEM         * TH PERCENTILE
                             QUANTITY            QUANTITY           QUANTITY
                                *        <=        100.000    <        *

                 BEST MATCHING AVERAGE: $      5.70000 QUANTITY LEVEL: *   WORK TYPE: *    AREA: *

       ESTIMATED PRICE: $        5.70000
-----------------------------------------------------------------------------------------------
     ITEM NUMBER: 2070012                   ESTIMATION IS BASED ON REGRESSION

                          UNIT PRICE   =   EXP  (
                                           1.7918
                                    +      0.0000 * 960627  /  1000000        BASED VALUE
                                    +      0.0000 *  LOG  (                   LETTING DATE
                                                      1,319.000
                                                           )                 QUANTITY
                                    +      0.0000                             AREA        -1
                                    +      0.0000                             SEASON       2
                                    +      0.0000                  )          WORK TYPE    2
       ESTIMATED PRICE: $        6.00024
```

```
                              STATE DEPARTMENT OF TRANSPORTATION                          PAGE 3
                                  GENERATE BID BASED PRICES                        PRINTED 06/27/96
------------------------------------------------------------------------------------------------
       PROJECT NO: 21766A         AREA: -1  COUNTY:              PROPOSED LETTING DATE:  06/27/96

       PROJECT DESCRIPTION: SOUND BARRIER                              WORK TYPE:  2
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 2077001

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 2080015                       ESTIMATION IS BASED ON WEIGHTED AVERAGES

                              * TH PERCENTILE           ITEM          * TH PERCENTILE
                                 QUANTITY              QUANTITY           QUANTITY
                                    *          <=       33.000    <          *

                   BEST MATCHING AVERAGE: $      813.00000 QUANTITY LEVEL: *   WORK TYPE: *     AREA: *

   ESTIMATED PRICE: $        813.00000
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 2130015

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 2140001

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 6090027

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 6210011

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 6217001

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 6217001

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 6217001

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 6217001

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 6217010

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 6230001

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
------------------------------------------------------------------------------------------------

   ITEM NUMBER: 6310011

     NOT ESTIMATED, NO BID HISTORY FOR ITEM
```

```
--------------------------------------------------------------------------------
      ITEM NUMBER: 6310012
          NOT ESTIMATED, NO BID HISTORY FOR ITEM
--------------------------------------------------------------------------------
      ITEM NUMBER: 6310026
          NOT ESTIMATED, NO BID HISTORY FOR ITEM
--------------------------------------------------------------------------------
      ITEM NUMBER: 6310027
          NOT ESTIMATED, NO BID HISTORY FOR ITEM
--------------------------------------------------------------------------------
      ITEM NUMBER: 6310054
          NOT ESTIMATED, NO BID HISTORY FOR ITEM
--------------------------------------------------------------------------------
      ITEM NUMBER: 6310055
          NOT ESTIMATED, NO BID HISTORY FOR ITEM
--------------------------------------------------------------------------------
      ITEM NUMBER: 6310060
          NOT ESTIMATED, NO BID HISTORY FOR ITEM
--------------------------------------------------------------------------------
      ITEM NUMBER: 6310061
          NOT ESTIMATED, NO BID HISTORY FOR ITEM
--------------------------------------------------------------------------------
      ITEM NUMBER: 6310065
          NOT ESTIMATED, NO BID HISTORY FOR ITEM
--------------------------------------------------------------------------------
      ITEM NUMBER: 6310066
          NOT ESTIMATED, NO BID HISTORY FOR ITEM
--------------------------------------------------------------------------------
      ITEM NUMBER: 6530036
          NOT ESTIMATED, NO BID HISTORY FOR ITEM
```

The Generate Project-Level Project-Level Bid-Based Prices process prints the bid history information, if it is available, for every item used in the project.

There are two types of bid histories: weighted averages and regression. The Trns•port BAMS/DSS PEMETH model analyzes the bid data decides on an item by item basis which type of bid history to produce for the Generate Project-Level Project-Level Bid-Based Prices process to use.

Weighted Averages

Weighted averages are used for unit price estimation when there is only a moderate amount of historical bid data available. The average price is weighted by the quantity of the bid item in the historical data.

For example, suppose an item had only three bids historically, as shown below:

Worktype	Quantity	Unit Price	Extended Amount
OLY	10	$300	$3000
WID	20	$200	$4000
OLY	30	$100	$3000

The average unit price would be $200 (the average of $300, $200 and $100), but the weighted average would be $166.67 because the weighted average takes quantity into account. The $200 bid is weighted more heavily than the $300 bid, and the $100 bid is weighted most heavily. The weighted average is computed by taking the total extended amount ($10,000 in this example) and dividing by the total quantity (60 in this example). The Generate Project-Level Project-Level Bid-Based Prices process uses the weighted average unit price of $166.67 as the estimated unit price of this item in future projects.

In many cases, the Trns·port BAMS/DSS PEMETH model determines that there is enough data to produce weighted averages for subsets of the data broken down by work type (as shown above). For example, when the model analyzes the data above, it might decide that the weighted average of $166.67, which is based on the bid data, can be used in general but that the weighted average of $150.00, which is based on the two projects with OLY worktypes, should be used for estimating projects with OLY worktypes.

There are three factors the model can use for breaking down the data into groups for weighted averages: work type, area of the state, and quantity level. Work type and area are self-explanatory. The quantity level is determined by first analyzing all the bid quantities for the item and computing the fifth, twenty-fifth, fiftieth, seventy-fifth and ninety-fifth percentile quantities (for example, if the twenty-fifth percentile quantity is 100, this means that 25 percent of the projects containing the item had less than 100 units of the item).

The five percentiles divide the item quantities into six levels numbered 0 through 5 (Level 0 = quantities that are less than the fifth percentile; Level 1 = quantities that are greater than or equal to the fifth percentile but less than the twenty-fifth percentile; and so on). Level 0 (quantities less than the fifth percentile quantity) and Level 5 (quantities greater than or equal to the ninety-fifth percentile quantity) are considered statistical extremes; therefore the Generate Project-Level Project-Level Bid-Based Prices process will not estimate items with quantities in those ranges. For such items, the report printed by the Generate Project-Level Project-Level Bid-Based Prices process will indicate that the item has not been estimated and the quantity level is 0 (for quantity less than the 5th percentile) or 5 (for quantity greater than the 95th percentile).

For Item Number 210-01130 the quantity level would be 3 because the item quantity of 1,929.0 is more than the fiftieth percentile quantity of 813.0 and less than the seventy-fifth percentile quantity of 2,021.75. The Generate Project-Level Bid-Based Prices process examined all the weighted average prices it had for this item and the best one available was $5.270, which was based on bid data for all quantity levels, all work types, and area 3 of the state (a * for quantity, work type, or area means "all").

When it searches for the "best" match, the Generate Project-Level Bid-Based Prices process tries to match the quantity level, then the work type, then the area. In the example above (quantity level 3, work type CONS and area 3) there are eight possible matches the Generate Project-Level Bid-Based Prices process could theoretically find. Ranked from best to worst, they are as follows:

Quantity Level	Work Type	Area
3	CONS	3
3	CONS	*
3	*	3
3	*	*
CONS	3	
*	CONS	*
*	*	3
*	*	*

The fact that the Generate Project-Level Bid-Based Prices process chose the seventh on that list means that the Trns•port BAMS/DSS PEMETH analysis model did not believe there was enough data to produce weighted averages for the top six cases.

Regression Analysis

Regression is used when a large amount of bid data is available for an item. The mainframe analysis model will fit the data to a mathematical formula, and the Generate Project Level Bid-Based Prices process will then use that formula to estimate the item's unit price. The formula takes five factors into account: inflation up to the date of letting, the quantity of the item, the area of the state, season of the year, and type of work as follows:

$$\text{unit price} = e^{(i + l*dt + q*\log(qty) + a + s + w)}$$

where

i   is the "intercept," a base value for the formula

l   is the coefficient representing daily inflation

dt   is the letting date, expressed as days since the beginning of 1960 (an arbitrary starting point)

q   is the coefficient representing adjustment for quantity

qty is the item quantity (NOTE: Log is the natural, not common, logarithm.)

a   is the coefficient representing the area of the state

s   is the coefficient representing the season of the letting

w   is the coefficient representing the type of work

e   is the base of the natural logorithm (2.7182)

The Generate Project Level Bid-Based Prices process will use the coefficients provided by the TRNS-PORT BAMS/DSS PEMETH model, combine them with the data for this project item, and produce a unit price estimate.

For example, in Item Number 202-00240 on page 3 of the accompanying report, the base value, or intercept, is 8.5100. The inflation coefficient is -454.5900/1000000 and the date of letting is 900801 (this is converted to number of days after the beginning of 1960). The quantity coefficient is -0.3200 and the quantity is 975. The area, season and work type adjustment coefficients are 0.0330, 0.1030, and -0.0980, so the unit price is calculated as follows:

$$e^{(8.5100-0.00045459*11170-0.3200*\log(975)+0.0330+0.1030-0.0980)} = 3.55$$

Appendix D. Sample Output - Generate Bid Tab Edit Report (LASGBTE)

Generate Bid Tab Edit Report (LASGBTE)

The Bid Tab Edit report analyzes individual line item bids for numerical accuracy. It marks irregular bids in the exception report. The report checks to make sure bidders enter extended amounts that are in line with the unit prices they offer and it tells you why bidders are irregular.

Category and Item Alternate Bid Edit

The first section of this report is the Category and Item Alternate Bid Edit. This report indicates bidding errors for category and item alternates such as incomplete bids on a set of alternates.

```
                          STATE DEPARTMENT OF TRANSPORTATION                          DATE : 04/21/95
                                                                                         PAGE : 1
                           CATEGORY AND ITEM ALTERNATE BID EDIT
-------------------------------------------------------------------------------------------------------
  LETTING     CALL      VENDOR       PCN       ALTERNATE    ERROR
-------------------------------------------------------------------------------------------------------

                              ***** NO ALTERNATE ERRORS FOUND *****
```

Item Bid Edit

The Item Bid Edit lists errors with proposal bid tabs, such as invalid extended amounts.

```
                           STATE DEPARTMENT OF TRANSPORTATION                      DATE : 04/21/95
                                      ITEM BID EDIT                                     PAGE : 2
------------------------------------------------------------------------------------------------------------
                          LINE      PROPOSAL        BID          BID
LETTING     CALL   VENDOR  NUMBER    QUANTITY       PRICE       AMOUNT      ERROR
------------------------------------------------------------------------------------------------------------
90-04-11    2      000006                                                   NO PLANHOLDER FOR VENDOR
90-04-11    2      000009                                                   NO PLANHOLDER FOR VENDOR
90-04-11    2      000031                                                   NO PLANHOLDER FOR VENDOR
90-04-11    2      000032                                                   NO PLANHOLDER FOR VENDOR
90-04-11    2      000048                                                   NO PLANHOLDER FOR VENDOR
90-04-11    2      000118                                                   NO PLANHOLDER FOR VENDOR
90-04-11    2      000164                                                   NO PLANHOLDER FOR VENDOR


* LUMP SUM ITEM
@ HYBRID LUMP SUM ITEM
```

Proposal Section Edit

The third section is the Proposal Section Edit. If a bidder's extended amounts do not add up to the section total, Trns•port lists that information in this section.

```
                           STATE DEPARTMENT OF TRANSPORTATION                      DATE : 04/21/95
                                    PROPOSAL SECTION EDIT                               PAGE : 3
------------------------------------------------------------------------------------------------------------
                                            VENDOR          CALCULATED
   LETTING     CALL     VENDOR    SECTION  SECTION TOTAL    SECTION TOTAL       ERROR
------------------------------------------------------------------------------------------------------------
               ***** NO SECTION TOTAL ERRORS FOUND IN VALID BIDS *****
```

Vendor Bid Total Inconsistent with Calculated Bid Total

The fourth section is the Vendor Bid Total Inconsistent with Calculated Bid Total. If a bidder's extended amounts do not add up to the proposal total, Trns•port lists that information in this section of the report.

```
                           STATE DEPARTMENT OF TRANSPORTATION                      DATE : 04/21/95
                    VENDOR BID TOTAL INCONSISTENT WITH CALCULATED BID TOTAL             PAGE : 4
------------------------------------------------------------------------------------------------------------
         LETTING      CALL       VENDOR    VENDOR BID TOTAL    CALCULATED BID TOTAL
------------------------------------------------------------------------------------------------------------
                   ***** NO VALID BIDS FOUND FOR BID TOTAL EDITING *****
```

Bidders Summary

The fifth section is the Bidders Summary, which ranks each bidder according to the calculated bid total. These rankings are "apparent" and Trns•port only considers them to be true rankings if Sections 1 through 4 of the report list no errors. The bid exception status column indicates which vendors have errors.

```
                              STATE DEPARTMENT OF TRANSPORTATION                          DATE : 04/21/95
                                       BIDDERS SUMMARY                                    PAGE : 5
LETTING : 90-04-11
CALL    : 2
CONTRACT: 002713.00
===========================================================================================================
        APPARENT        VENDOR                              CALCULATED        PROPOSAL        BID EXCEPTION
        RANK            NUMBER      VENDOR                  BID TOTAL         BID TOTAL        STATUS
===========================================================================================================

          1             000118      STETSON & WATSON, J.    345,232.00        345,232.00           I
          2             000032      REED & REED             347,322.95        347,322.95           I
          3             000048      TILCON STATE INC        351,704.70        351,704.70           I
          4             000164      C P M CONSTRUCTORS      419,687.25        419,687.25           I
          5             000009      BANCROFT CONTRACTING    422,115.90        422,115.90           I
          6             000031      COLWELL CONST CO INC    434,361.45        434,361.45           I
          7             000006      CALLAHAN BROS. INC.     449,155.05        449,155.05           I
```