Chapter 2 – Navigating the System

Contents

2.1 AASHTOWare Project (AWP) Preconstruction Organization

The AWP Preconstruction module is organized into three main components: Project, Proposal, and Letting.
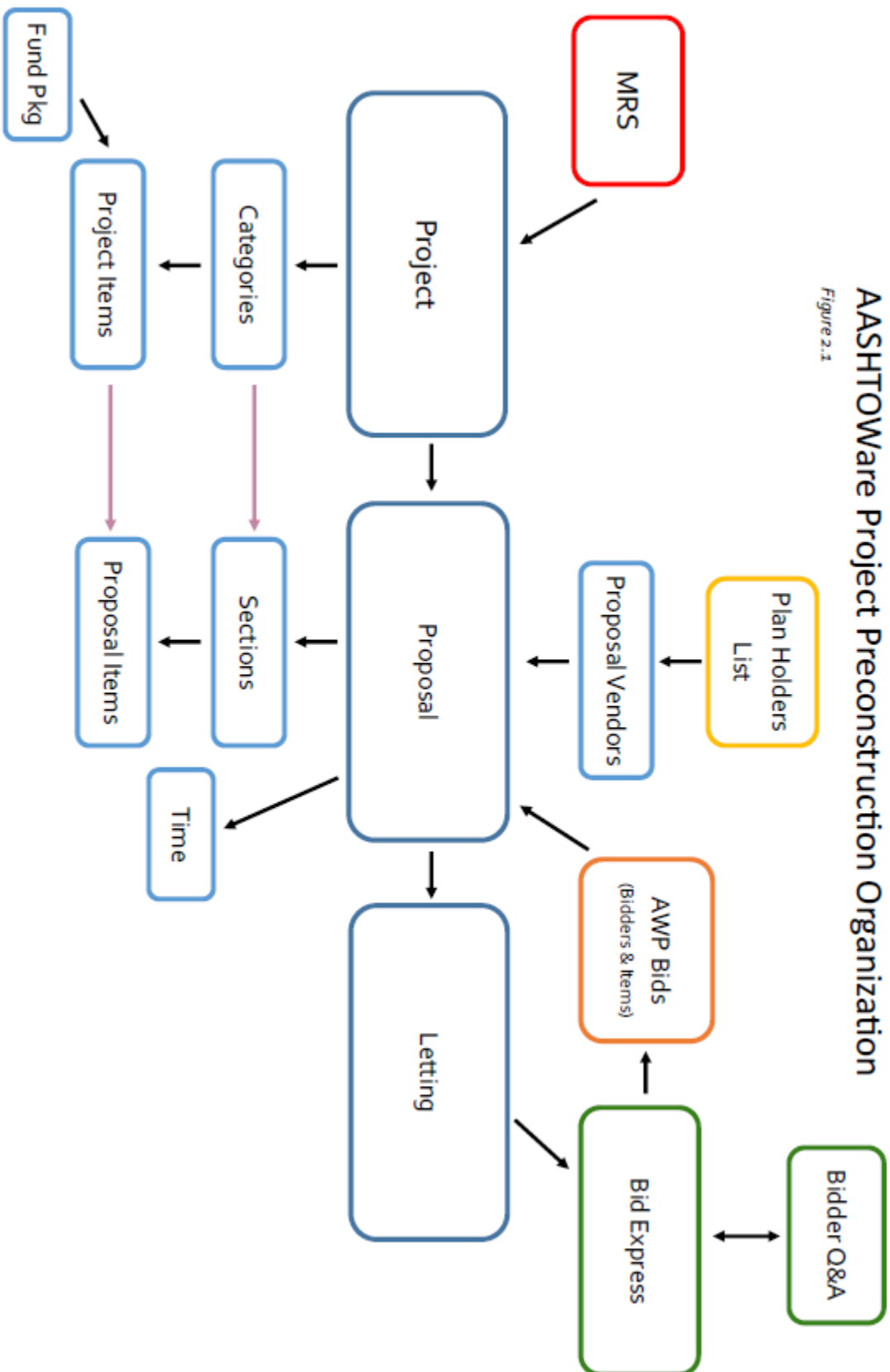
Project   The Project component facilitates the creation of the project information and engineer's estimate including funding.

Proposal   The Proposal component facilitates the creation of the PS&E package. The Proposal may have one or more projects associated to it. The Proposal is what is advertised (let). The Proposal component is also where vendor bid information is stored and analyzed prior to award.

Letting   The Letting component facilitates the advertisement of a Proposal. This component creates the AWP Bids file into which contractors enter their bid information for a Proposal.

AWP Bids   Bids is not a component within AWP Preconstruction. It is a supplementary piece of software that interacts with AWP Preconstruction to create Bids files for contractors to enter bid information and then receive the information back into AWP Preconstruction.

Bid Express Bid Express is an independent website that is used for advertising projects, facilitating bidder questions and answers, and that allows contractors to securely submit their AWP Bids files and any supplemental information to DOT&PF electronically.

The AWP Preconstruction Organization image on the following page shows the connection between the three main components and smaller entities within the components (i.e. categories or proposal vendors), existing DOT&PF programs (i.e. MRS and the Plan Holders' List), and AWP Bids and Bid Express (*Figure 2.1*).

NOTE: Most users will not have access to all the areas of AWP Preconstruction described above. AWP access is based on the role the user is logged in as. Roles and access to AWP for each are described in chapter two (2).

AASHTOWare Project Preconstruction Organization

Figure 2.1

Fund Pkg → **Project Items**

MRS → **Project** → **Categories** → **Project Items**

Project → **Proposal**

Categories → **Sections**

Project Items → **Proposal Items**

Plan Holders List → **Proposal Vendors** → **Proposal**

Proposal → **Sections** → **Proposal Items**

Proposal → **Time**

Proposal → **Letting**

AWP Bids (Bidders & Items) → **Proposal**

Letting → **Bid Express**

Bid Express → **AWP Bids (Bidders & Items)**

Bid Express ↔ **Bidder Q&A**

2.2 Dashboard and Components

When you log onto AASHTOWare Project (AWP), the software opens on the dashboard (*Figure 2.2*). You can also go to the dashboard at any time by clicking **<Home>** on the Menu bar. The dashboard contains one or more components. Each component is identified by a title set within a blue header bar. Each component provides access to the information and processes required for a specific area of your agency's work (e.g. Projects, Proposals, Lettings, etc.). The components you see on your dashboard are those that match the specific areas of responsibility assigned to your active role. The following example shows the dashboard as it appears for an AWP System Wide Administrator. Keep in mind that many of the components shown in the example may not be available for you depending on your active role. The different parts of the dashboard are described in detail in the next several sections.
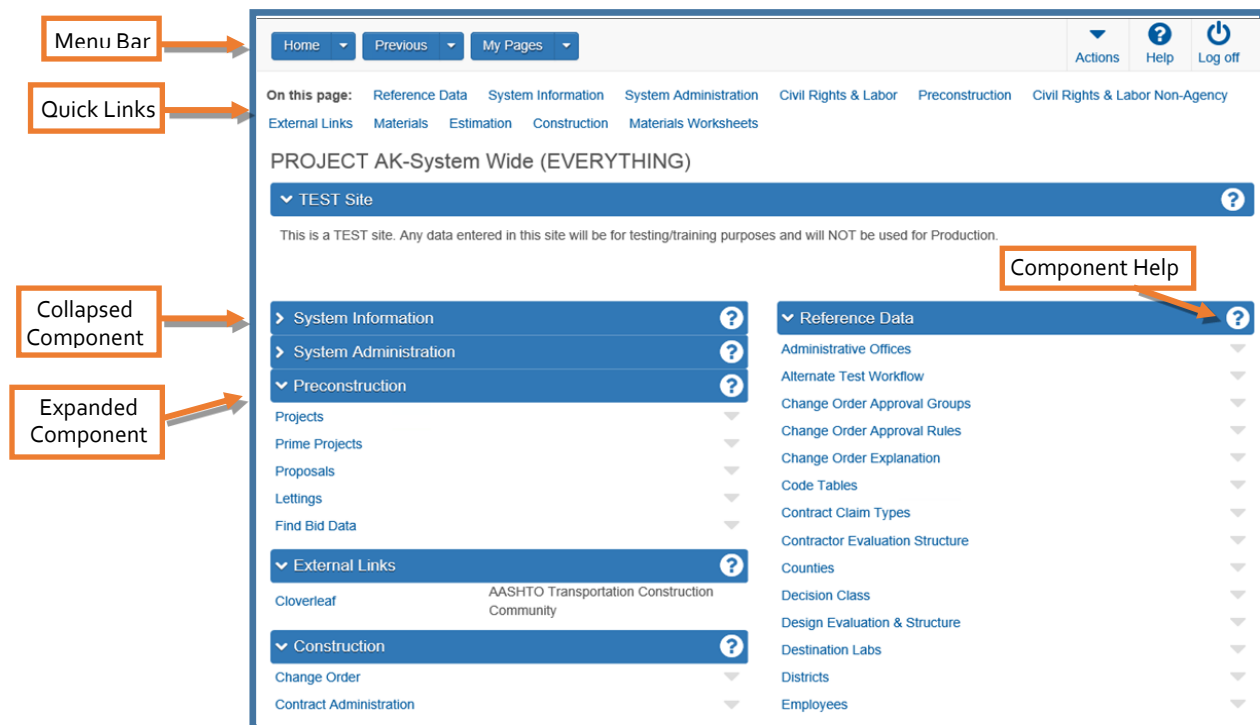

Figure 2.2

2.3 Menu Bar

The Menu Bar is a horizontal strip that the system displays at the top of every webpage in the system. The buttons and menus on this bar help you move quickly through the system to visit the pages and components you use most often (*Figure 2.3*).
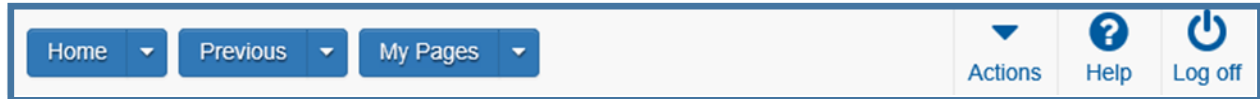

Figure 2.3

> **Home** – Clicking this button takes you to the dashboard for you active role. Clicking the down arrow opens the Home menu, which contains which lists all the roles assigned to you and contains an indicator for your active role (a green checkmark) (*Figure 2.4*).This menu allows you to switch roles from any location in the system. When you switch roles, you remain on the component where you were working unless the new role does not have the appropriate security rights, in which case the system takes you to the dashboard. To learn more about the different roles, see sections Understanding Roles and Roles and Access.
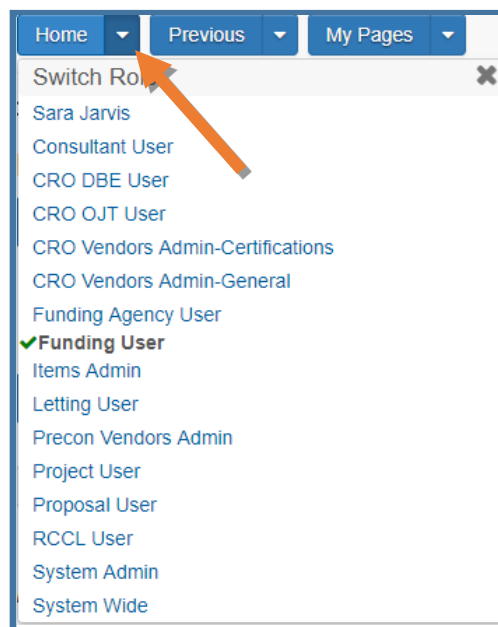

Figure 2.4

➤ **Previous** – The Previous button acts as a browser back button. Clicking this button returns you to the last page you visited in the system using your active role. Clicking the down arrow displays a list of links to the ten (10) most recent pages you visited in your currently active role (*Figure 2.5*). You can return to any page on this list by selecting the shortcut from the list. If you wish to return to previous pages not appearing on the list, select the **View Previous Activity link**. The Recent Activity Overview component will appear with a list of all recent pages you have visited.
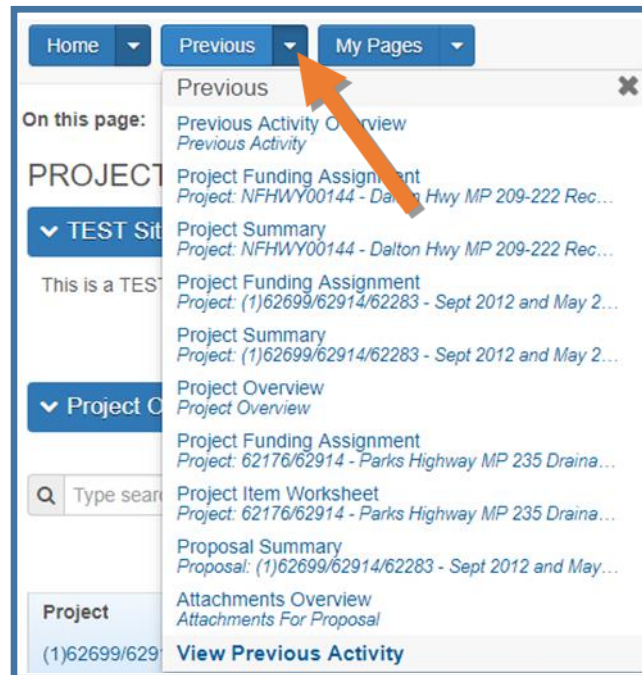

Figure 2.5

➤ **My Pages** – My pages allows you to bookmark frequently used pages for your active role and manage your bookmarks.

To bookmark a component or page (*Figure 2.6*):

1. Navigate to the component or page you wish to mark.
2. (A) Click the dropdown arrow next to the **<My Pages>** button.
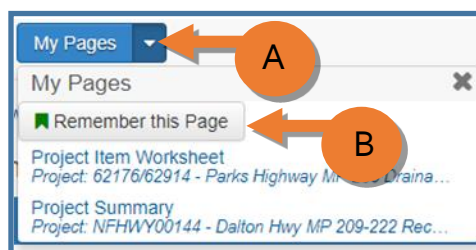3. (B) Click the **<Remember this Page>** button.

Figure 2.6

The system will remember the pages and list them when you click the dropdown arrow next to the **<My Pages>** button once they have been marked.

To delete bookmarks (*Figure 2.7*):

1. Navigate to the My Page Overview component by clicking the **<My Pages>** button.
2. (A) Click the **row action arrow** for the bookmark to be deleted.
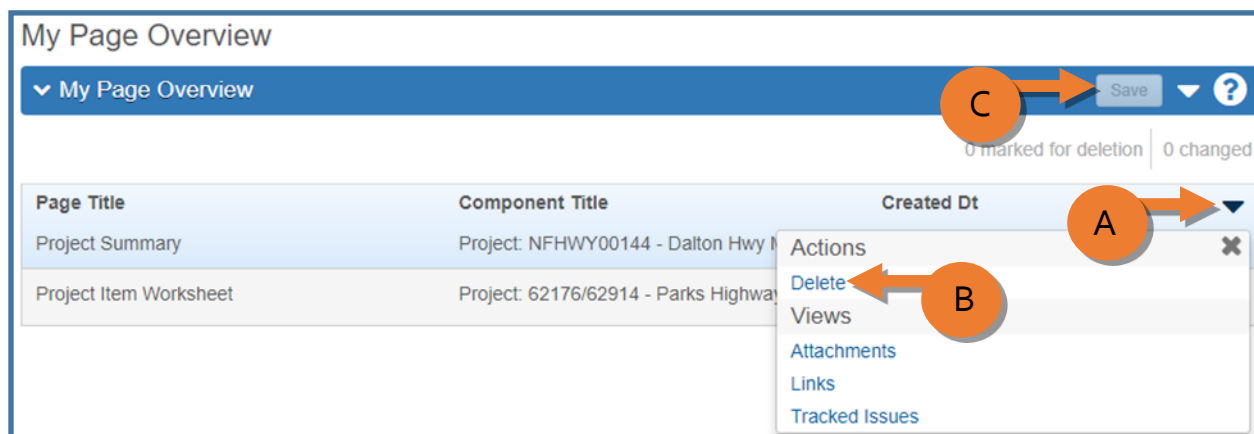3. (B) Select **Delete**.
4. (C) Click **<Save>**.

Figure 2.7

➢ **Global Actions** – Clicking the Actions button opens a menu of global (system wide) actions you can take within the system (*Figure 2.8*). Though many actions are listed, AWP Preconstruction users may only need to access Open Process History, Import File, and Generate Reports from the list depending on their active role and specific task. More information is provided on these three actions in future chapters.
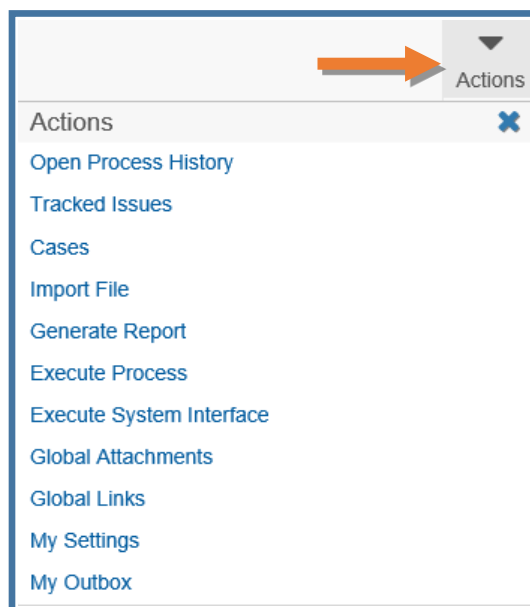

Figure 2.8

➢ **Global Help** ![Help icon] – Clicking the Global Help button takes you to a separate browser window containing the online base AASHTOWare Project Help. Global Help takes you to the Help for New Users section of the online help and you can navigate to specific sections depending on the component/task for which you need help. Each Help page provides links to other Help pages containing related information (*Figure 2.9*).
NOTES:
  ▪ Each component has a Help button. ![Help button] The AWP online help system is context sensitive, which means that when you click a Component Help button anywhere in the system, you are directed to the part of the online help system that is specifically related to that component.
  ▪ DOT&PF has heavily configured (customized) AWP Preconstruction. The AWP online help is based on the base product so may not match exactly what you see on your screen.
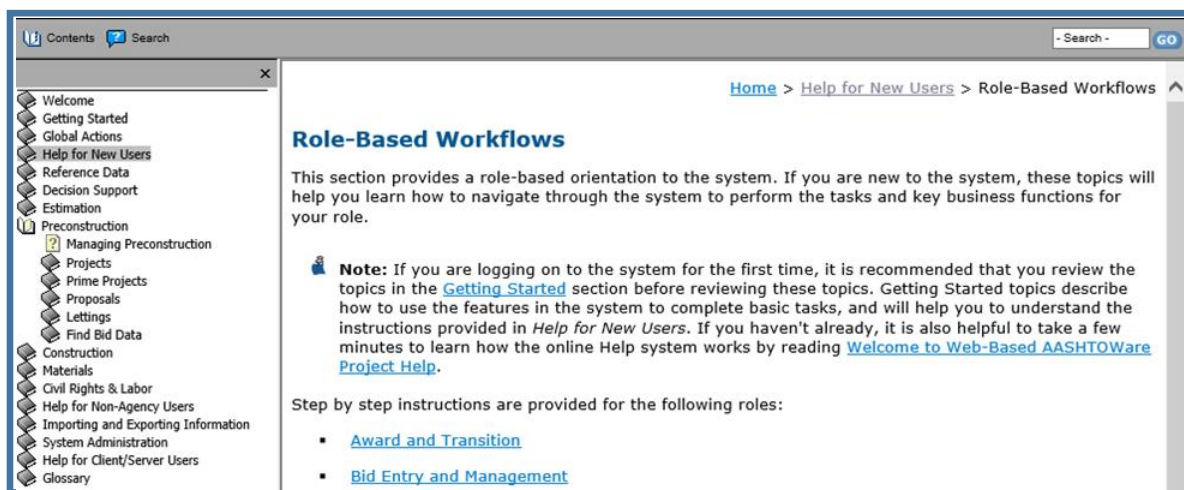

Figure 2.9

➢ **Log Off** ![Log off icon] – Clicking this button ends your AWP session. See chapter 1 for more.

2.4 Quick Links and Hypertext Links

Quick links are displayed in blue text below the menu bar and above the webpage title (*Figure 2.10*). These links allow you to quickly jump to other related application pages.

Hypertext links can be located anywhere on an application component or webpage and are identified by the light blue smaller text. When clicked, a link takes you to another component or page (*Figure 2.10*).
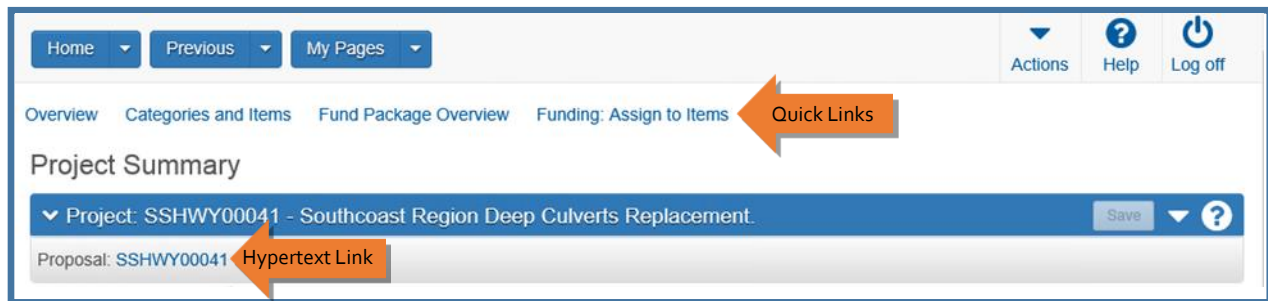

Figure 2.10

2.5 Icons

Icons are small images throughout the system that either convey information or can be clicked to perform an action. For example, a red asterisk icon indicates a required field. A blue question mark inside a white circle indicates component help.

2.6 Alternate Paths

Keep in mind that all of the various navigational elements, such as hypertext links, quick links, previous pages, and Actions menus, can all provide different ways of accomplishing the same task.

2.7 Understanding Roles

A user role is a name associated with a collection of security access rights to the information contained in system components. Roles combine the permissions needed for several related tasks and allow you more efficient access to the portion of the system you need. Roles have been designed specifically for Alaska DOT&PF and are assigned to you by your regional Module Administrator.

You can switch your role at any time and from any page while working within the application. By selecting a different role, your permissions and security access are changed to reflect the areas you need to access to perform duties under the selected role. When roles are switched, the system continues to display the component you have been working on unless the new role does not have access to the component. If that is the case, the system takes you to the dashboard.

1. Click the dropdown arrow next to the **<Home>** button to view a list of all the roles assigned to you (*Figure 2.11*).
2. A green checkmark appears next to the *active role*.
3. Select the role you want to switch to.
4. The role will now be active for the component you had opened under the previous role.

To learn about each AWP Preconstruction role and the tasks the roles perform in AWP, see the next section: Roles and Access.
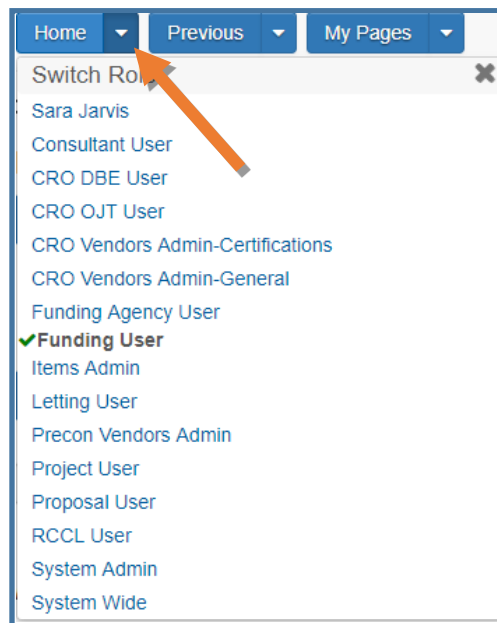

Figure 2.11

Roles are assigned to users and are what determine access to the system. Alaska DOT&PF has created specific roles associated with AWP Preconstruction components and functional tasks to be performed in the system. A user may be assigned one or multiple roles depending on the tasks to be performed and the amount of access the user requires to perform those tasks.

Project User
The Project User role has access to the Project component only. Within the Project component, users with this role can enter basic project information, create categories by which to group items, create items (the engineer's estimate), look up historical bid data (for projects in the AWP system), and generate Project level reports. Project Users have access to all projects in a region.

Funding User
The Funding User role has limited access to both the Project and Proposal component. Within the Project component, users with this role can create fund packages, set up funds, and assign items to fund packages. The Funding User role can view, but not edit, minimal basic project information and can access categories and items in order to assign funding. Within the Proposal component, users with this role can view minimal basic Proposal information and can edit only the few fields that contain financial information. Funding Users can generate some Project and Proposal level reports. Users with the Funding User role may or may not also have the Project User role. Funding Users have access to all projects in a region.

Proposal User
The Proposal User role has limited access to the Project component and full access to the Proposal component. Within the Project component, users with this role can view, but not edit, minimal basic project information and can edit only the Tentative Advertising data fields Categories and Items. Most users with the Proposal User role will also have the Project User role. Within the Proposal component, users with this role can create proposals, enter basic proposal information, and associate projects to the proposal. The Proposal User can generate items and sections to create the bid schedule and also The Proposal User can generate Project and Proposal level reports. Proposal Users have access to all proposals in the system regardless of region.

Letting User
The Letting User role has access to the Bid Letting component only. Users with this role can create a bid letting, associate a proposal to it, and enter dates associated with the letting. The Letting User can generate the AWP Bids file to upload to Bid Express to allow contractors to create their bids, as well as create and post addenda and notices to bidders once the proposal has been let. After the letting date (bid opening date), the Letting User can import contractor bid information and perform bid analysis. Users with the Letting User role will also have the Proposal User role. Letting Users have access to all lettings in the system regardless of region.

RCCL User   The RCCL (Regional Contracts Compliance Liaison) User role has access to the Proposal component only. Users with this role will have access to proposal items, contracts compliance related fields in the Proposal Summary, and reports to assist in goal creation. RCCL Users have access to all proposals in the system regardless of region.

Consultant User   The Consultant User role has access to the Project component only. Users with this role have view only access to minimal basic project information and can only create categories and items (the engineer's estimate). Consultant Users have access to individual projects only as assigned by the Design Manager for the project. NOTE: Depending on the tasks assigned to the Design Consultant, the Funding User role may also be assigned to the Consultant.

Bridge Data User   The Bridge Data user role has read only access to the Project Component. Users with this role can view the Road Segments and Bridges tab on the Project Summary component to review bridge information entered by design. This role also has access to the Find Bid Data component and the items lists.

Items Admin User   The Items Admin User role has access to the item reference data only. Regional Module Administrators are the only users to have this role. Users with this role can create new items as needed in the AWP item master list.

Precon Vendors Admin The Precon Vendors Admin role has access to vendor data only. Users with this role can edit vendor address information that has been pulled into AWP from the IRIS VSS system, create additional address information, and generate the vendor list file to upload to Bid Express.

Module Admin User   The Module Admin User role has access to areas relating to DOT employee AWP accounts. This role allows regional Module Administrators to add or remove individuals from the AWP system or add or remove roles from users. This role also has the ability to add reference Funds to the system for users to add to Fund Packages.

CRO DBE User   The CRO DBE (Civil Rights Office Disadvantaged Business Enterprise) User role has access to the Proposal component only. Users with this role can view, but not edit, minimal basic proposal information and can edit only the Contracts Compliance DBE fields. CRO DBE Users can access proposal attachments and some Proposal Vendor DBE Commitment information.

CRO OJT User   The CRO OJT (Civil Rights Office On the Job Training) User role has access to the Proposal component only. Users with this role can view, but not edit, minimal basic proposal information and can edit only the Contracts Compliance OJT fields and access proposal attachments.

CRO Vendors Admin   There are two CRO Vendors Admin roles. The first, CRO Vendors Admin-General is similar to the Precon Vendors Admin role, specifically for modifying

address and other basic vendor information transferred into AWP from IRIS VSS. The CRO Vendors Admin-Certifications role has similar access to address information, but has additional access to vendor officers and annual data. This role has unrestricted access to vendor DBE areas for managing DBE Certifications.

2.9 Using Components

The system displays information in application components (*Figure 2.12*). A component is a container for the information and business functions on an application webpage related to your role. The example shown below is the Project Summary component. Components are made up of elements such as fields, containers, tabs, and links. Some components have groupings of related fields inside labeled boxes called Containers. Some components contain a list of tabs along the left side, each of which corresponds to a subset of information related to the component. On component screens where the amount of fields makes it necessary to scroll down, there is a Quick Scroll to Top button in the lower right corner.

Figure 2.12

Fields are the most common element found on components. Information can be recorded and viewed in fields. You can move from one field to another by clicking **<Tab>**. The system has several different types of fields which are described below and shown on the following page (*Figure 2.13*).

Text Boxes Directly type or delete information.

Numeric Fields Numeric fields allow only numeric characters.

Alphanumeric Fields Alphanumeric fields allow both numeric and alphabetic characters.

Auto-complete Fields Auto-complete fields are similar to text boxes except that they display a filtered list of values based on the first few characters typed into the field.

Date Fields Date fields include a calendar button next to the field. Click the Calendar icon to display a calendar and select a date to populate the field.

Dropdown List Boxes Dropdown list boxes include a down arrow next to the field. Click the dropdown arrow to display a list of possible field values.

Non-editable Fields Non-editable fields display information without a text box. The information cannot be changed.

Checkboxes Checkboxes are square boxes that can be selected or cleared using positioning the mouse pointer over them and clicking the left mouse button. Checkboxes are used to turn an option on or off.

Required Fields Any field with a red asterisk next to the label is a required field. These fields must be filled out when any data is initially entered into the component screen you are working on.

Tool Tips Hover over a field label and the associated tool tip with specific information about that field or what information should be entered will appear in a black box.

Field Validation Click in the data entry portion of a field and specifics about the data to be entered will appear including maximum number of characters or specific formatting. For example, if you click in the Latitude field in the Project Summary Points tab, the format *DD:MM:SS:s*s will appear.

Figure 2.13

2.11 Entering Data in a Range of Fields

The Range Fill feature provides a quick way to copy the same value to the same field on multiple rows of a list (*Figure 2.14*). For example, if you are assigning the Basic Bid category to all the items on your Project Item Worksheet, you can add the Basic Bid category to the first item and then use range fill to enter the same category for all of the items at the same time.

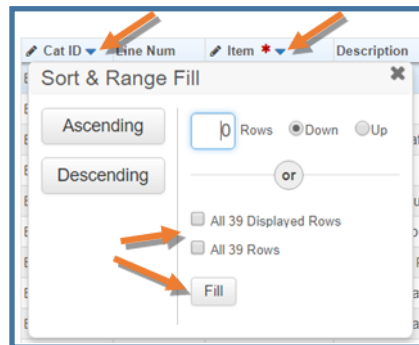Fields that allow range fill are identified by a small blue down arrow beside the field's label.

Figure 2.14

2.12 Search, Sort, and Filter

There are many records stored in AWP. Searches, Sorts, and Filters can help zero in on the exact information you need. The most basic is search. Sort and Filter can be very basic as well, but allows multiple filters and sorts to be applied at once make sure you are only seeing the information you want.

Search:

> Staff can use the search box to narrow the list of options (*Figure 2.15*). After entering in three (3) characters, the system begins searching for the string of characters. Enter more characters to narrow down the search to something more specific. Use the eraser icon to delete the data entered and begin a new search.
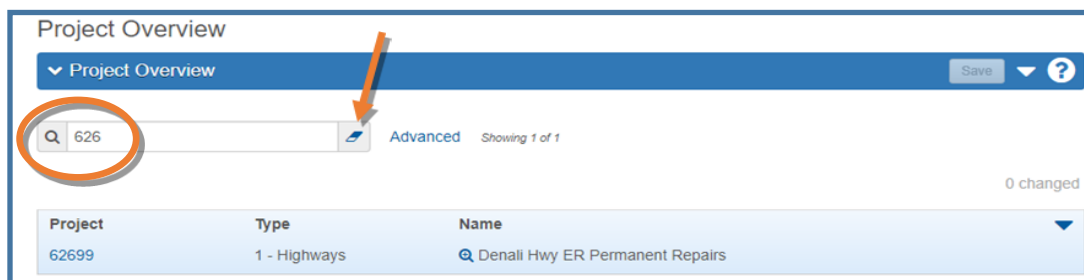

Figure 2.15

Filters are a very powerful tool within AWP. There are many sort and filter options throughout the system. You can create and save filters and even set default filters so when you are in AWP, you only see the information you want unless you turn your filter off. You can create a filter and/or sort to use once or to save and use again or set as your default.

To open the filter/sort function (*Figure 2.16*):

> For the component you want to filter, click the **Advanced** link or select **Advanced** from the dropdown. *Figure 2.16* shows both options.
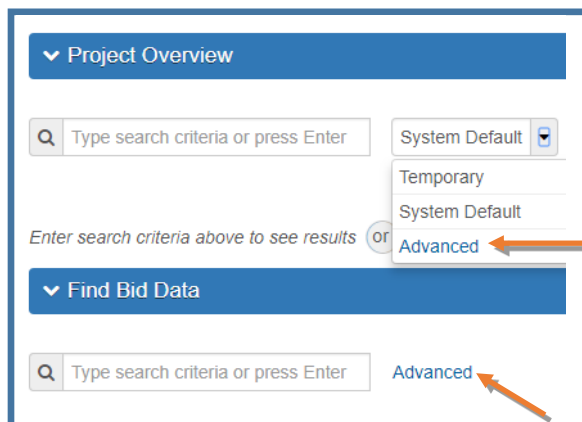

Figure 2.16

To set up filter and sort (*Figure 2.17*):

Filter:

You can set up multiple filter rows with 'and' or 'or' conditions. For instance the example in *Figure 2.17* shows the filter set to look for Highway projects AND in Northern Region. The first dropdown in the filter row displays the fields by which you can filter (for the component you are in). The second dropdown in the filter row will show the list for that field (if it is a dropdown) or you will have to enter a value, like in Filter Row 2. You can add as many filter rows as needed.

Sort:

You can likewise set up a sort or multiple sorts in order. In the example in *Figure 2.17*, the filtered items above are set to sort by Project ID when displayed. You can add as many sorts as needed.

Apply Settings:

You can apply your filter one time and not save for future use by clicking the <**Apply without Saving**> button.

If you want to save your filter for future use, give it a name and click the **<Save and Apply>** button. You may want to make this your default filter so whenever you are in the component where the filter is set up, your filter is automatically applied unless you turn it off. To do this, check the **Make this the**

default setting box. To turn off a default filter, from the dropdown next to the component field where the filter is set up, select **System Default** or another saved filter (see *Figure 2.16*).

Figure 2.17

Attachments provide an easy way to integrate outside information of various kinds into your Project or Proposal. Attachments are accessed on the Project and Proposal components by clicking the **action menu** on the component header. The Attachments Overview component contains a list of rows for all the files that have been attached to the entity by you or another user.

To add an attachment:

1. Navigate to the component (Project, Proposal, or Proposal Vendor) to which you want to attach the file (*Figure 2.18*).
2. (A) Expand the component **actions menu**.
3. (B) Select **Attachments**. The Attachments Overview component will appear (*Figure 2.19*).
4. (C) Click **<Select File>**.
5. Locate and choose the file you want to attach
6. Click **<Open>**.
7. (D) In the **Description** field, type a description for the attachment
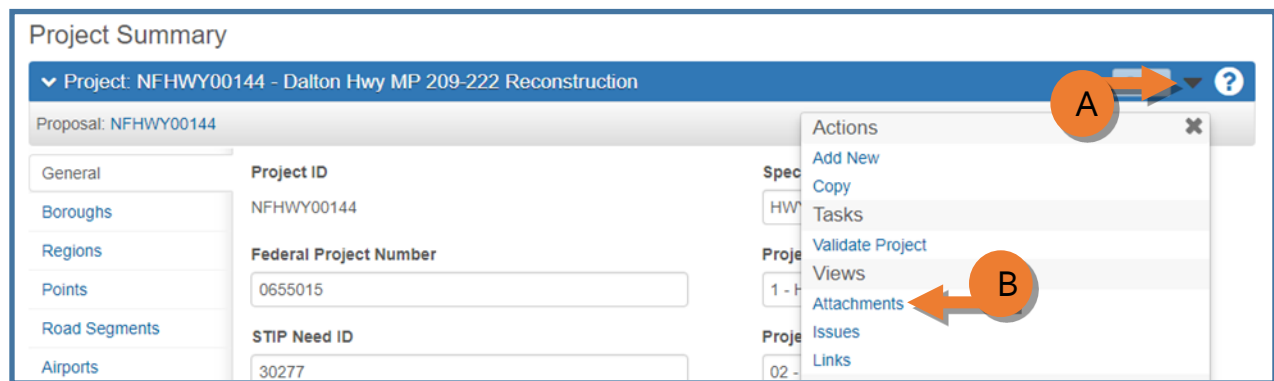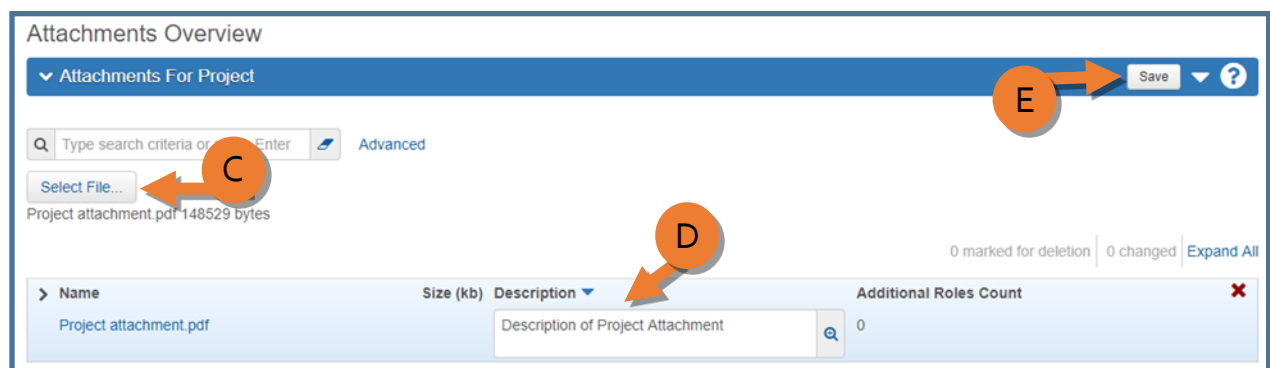8. (E) Click **<Save>**.

Figure 2.18

Figure 2.19

To delete an attachment:

1. Navigate to the component (Project, Proposal, or Proposal Vendor) with the file you want to delete (*Figure 2.20*).
2. (A) Click the component **action menu**.
3. (B) Select **Attachments**. The Attachments Overview component will appear (*Figure 2.21*).
4. (C) In the Attachments Overview component, expand the row **action menu** for the attachment you want to delete.
5. (D) Select **Delete**.
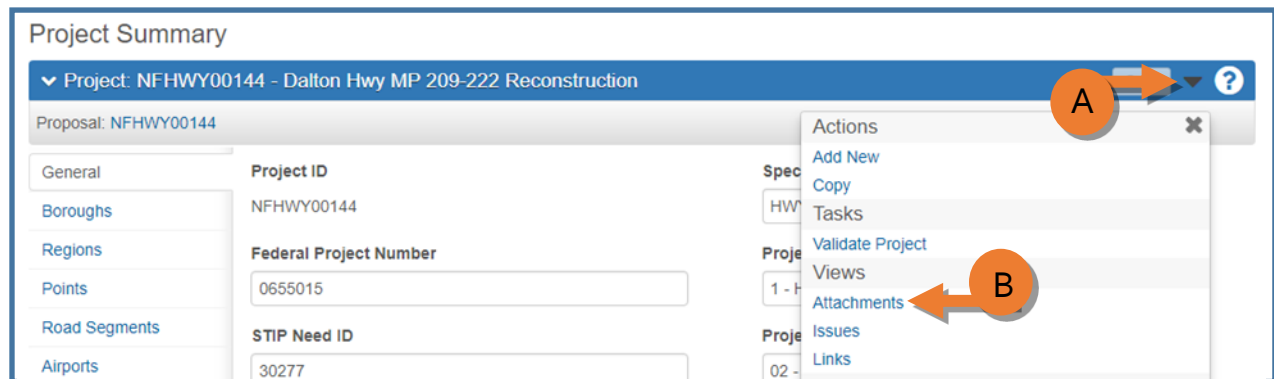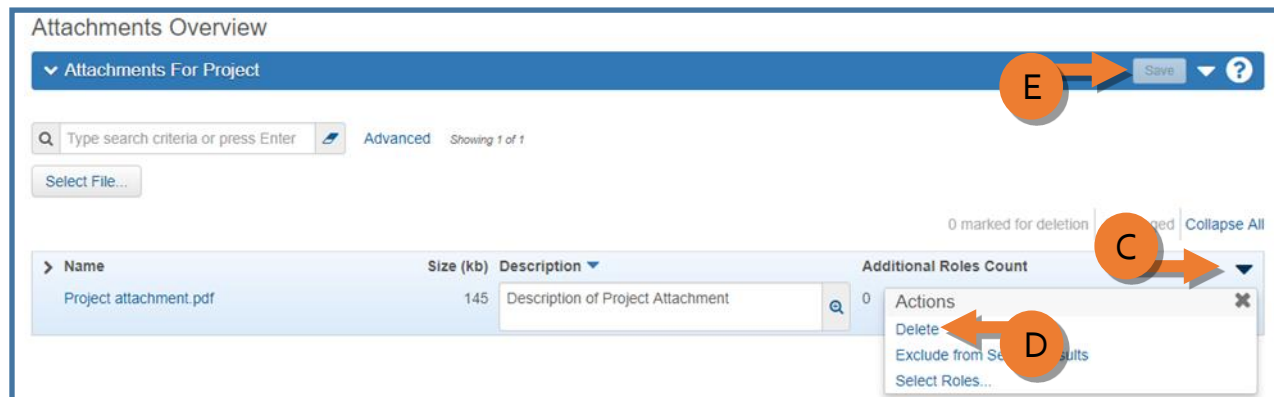6. (E) Click **<Save>**.

Figure 2.20

Figure 2.21

2.14 Saving Your Data

It is always a good idea to save your data often. AWP does not save unless you tell it to. If your screen remains idle and your AWP page times out, any data entered since the last time you saved will be lost. AWP will help remind you to save. When you have made any changes to the data, the following reminder will appear at the top of your screen letting you know that you have unsaved changes.

> There are unsaved changes. ✖

Once you have clicked **<Save>**, AWP will let you know that your data has been successfully saved.

> Save Complete ✖

2.15 Warnings and Error Messages

Warnings alert users to a piece of data that may be missing or incorrect. These messages are simply an alert to the user and will not prevent the user from continuing.

> **Warning:** Detected rows with warnings. Please review messages below.
> The sum of the Project Borough Percentages on a Project should equal 100.   ✖

Error messages also alert the user to a piece of data that may be missing or incorrect, but error messages prevent the user from continuing until the error is fixed.

> **Error:** No rows saved; detected 1 row with errors. Please review messages below.
> • Cannot change Project Item. Bid Schedule Supplemental Description is required when Item Supplemental Description Required flag   ✖
>   is set to true.
> Show All │ Show Errors

A Workflow is a set of related Workflow Phases during the Project/Proposal/Letting process. A Workflow Phase is a period in the Project/Proposal/Letting process in which data fields may be open to users to add or edit information or in which data fields are locked so users may not add or edit data as appropriate during the Preconstruction process. For example, a Workflow Phase exists for Preconstruction staff to create or edit the Project and Proposal information, but another Workflow Phase exists to lock that same info after Award. **Proposal Users** and **Letting Users** only have access to change the workflow phase. All other roles have no access to workflow.

Alaska DOT&PF has eight (8) workflow phases (*Figure 2.22*):

Project Definition   Projects imported from MRS have this default workflow phase. Projects in this workflow phase are overwritten nightly in the MRS→AWP interface information push. Projects manually added to AWP (not transferred from MRS) skip this phase.

Proj Design & Review   When a project workflow phase is changed to Proj Design & Review, MRS stops overwriting the project information. This phase lasts through PS&E Review until advertisement. All users can add/edit/delete information in this workflow phase. No information is locked down.

Assigned to Letting   This workflow phase is selected when a proposal is assigned to a letting and advertised. When a proposal is in this phase, the proposal line numbers are locked and cannot be changed. Any project items added while in this phase must have a proposal line number manually assigned.

Advertising   The proposal is advertised. This workflow phase is required to make changes to project and proposal information by addendum and to issue addenda and notices to bidders. Only Letting Users can make addenda changes and issue addenda and notices to bidders.

Award Processing   Once bids have been opened, this workflow phase is for performing bid analysis. In this phase, several fields/areas are locked: project and proposal items, project categories, proposal sections, and project/proposal associations.

Add Alt Analysis   This workflow phase locks all bid information and determination of awarding additive alternates or additional NTPs can be made if necessary. If no additive alternates or additional NTPs, this workflow phase is skipped.

Awarded   Proposal is awarded and becomes a contract. A proposal must be in this workflow phase to be transitioned to Construction.

Active Contract   Final Preconstruction workflow phase. The system automatically selects this phase when a proposal/contract is transferred to Construction.

Figure 2.22