Chapter 3 – Project Creation

Contents

Project

The Project User role has the ability to add or edit project and item information with a few exceptions. The Proposal User role will add or edit the tentative advertising information as well as change the project workflow phase (defined and described in chapter two (2)). There will take some coordination between the Project User and the Proposal User (if one person doesn't have both roles) to make sure the workflow phase is changes when necessary. The Letting User role (Contracts) will add, delete, or edit project information when a project is advertised and addenda are issued.

The Project Overview component is the gateway to managing all of the information in a project record. Projects are started when basic information is transferred to AASHTOWare Project (AWP) from MRS, but projects can also be started in AWP without any information transfer from MRS. The project fields that are transferred from MRS are detailed in the Project Summary Data Fields chart at the end of this chapter.

Project info is transferred from MRS into AWP Preconstruction nightly. Projects that are being actively worked on in AWP must have their workflow phase changed to **Proj Design & Review** or the nightly MRS information transfer will overwrite all data normally transferred. The Design Manager, logged in as Proposal User, will usually change the workflow phase when the project is assigned to a Designer, unless the Designer also has the Proposal User role.

First, the project will be started, whether from scratch or pulled in from MRS and the workflow phase changed. Then, the rest of the project information will be added or may be edited as described in the following sections.

Starting a Project from scratch:

1. Log into AWP and make sure the ***Project User*** role is selected. (*Figure 3.1*)
2. (A) Expand the Project Overview component **action menu**.
3. (B) Click **<Add>**.

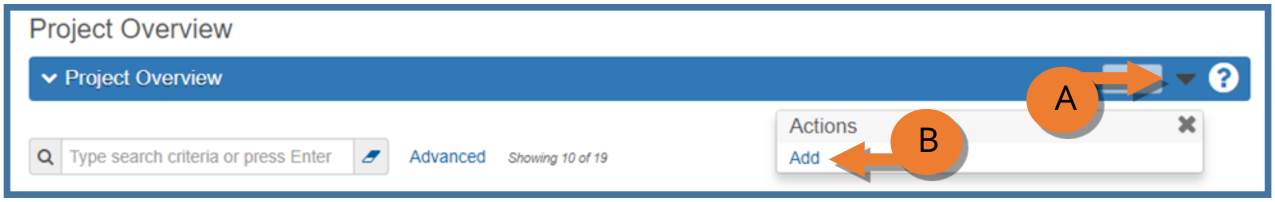


Figure 3.1

Because Projects are region-specific, you must add the region information first, or else once you hit save, you won't be able to see the project.

(*Figure 3.2*)

4. (C) Click the **Regions** tab.
5. (D) In the **Region ID** field, search for and select your region.
6. (E) Check the **Primary** checkbox if this is the primary region or only region for this project.
7. (F) If applicable, in the **Maintenance District** field, enter the maintenance district or primary maintenance district in which the project lies. Leave the field blank for other types of projects for which M&O will not take over maintenance once construction is complete.

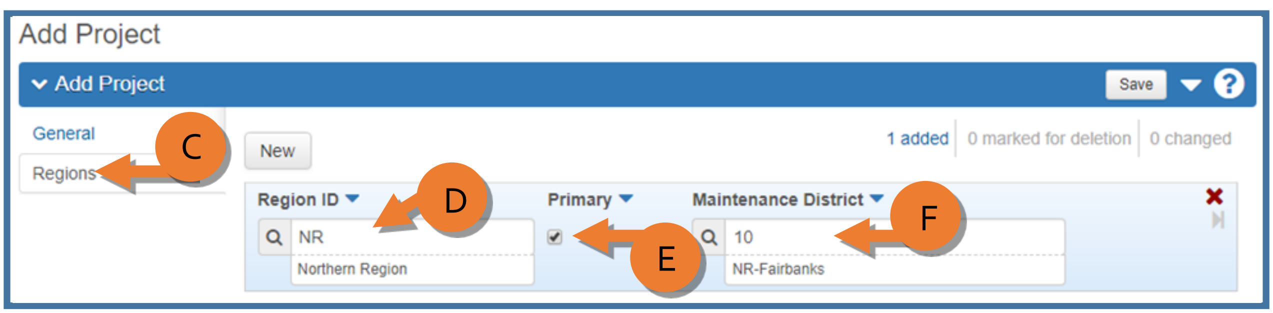


Figure 3.2

(*Figure 3.3*)

8. (G) Click the **General** tab (the Regions tab will have a little dot next to it indicating that there is unsaved information on that tab. That will go away once you complete the General tab fields and click save).

Enter the required fields (those with red asterisks next to the label).

9. (H) In the **Project ID** field, enter the project's state number (IRIS number).

10. (I) In the **Project Name** field, enter the name of the project.
11. (J) From the **Item List** dropdown, select the appropriate item list for your project.
    NOTE: Item lists are NOT spec books. This list will determine which items you are able to add to your project. There are four (4) item lists: Highways (which contains highway items, facilities items, and marine highway terminals items), Aviation (which includes aviation items and facilities items), and AMHS-Vessels (which is for marine highway vessels items only), and Public Facilities (for standalone PF projects).
12. (K) Click **<Save>**.
13. Go to the next section: Changing the Project Workflow.

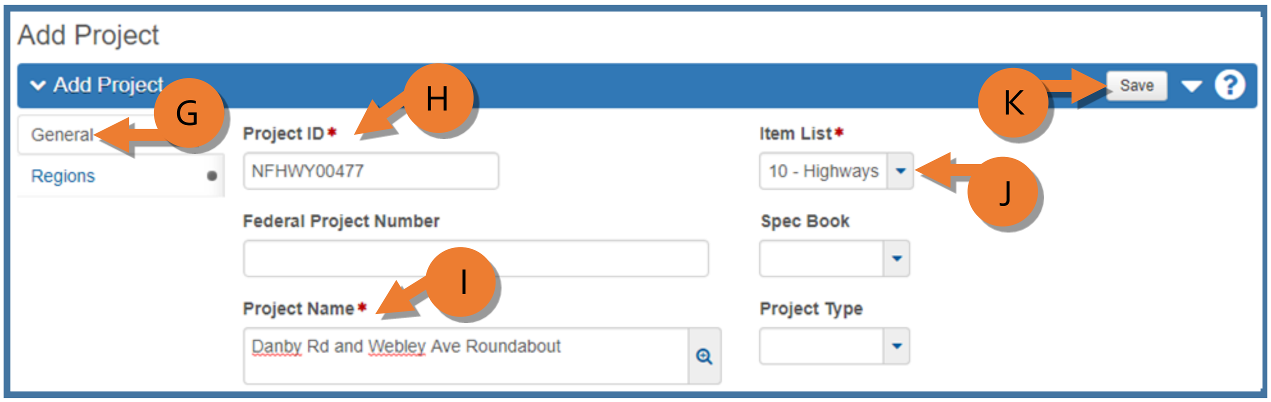


Figure 3.3

Starting a Project transferred from MRS:

1. Log into AWP and make sure the ***Project User*** role is selected.
   (*Figure 3.4*)
2. (A) In the Project Overview component, search for your project. NOTE: A minimum of a three (3) character string is required for the system to search. You can search by Project ID (State/IRIS number) or the Project Name.
3. (B) Click the **Project ID** link to open the project.

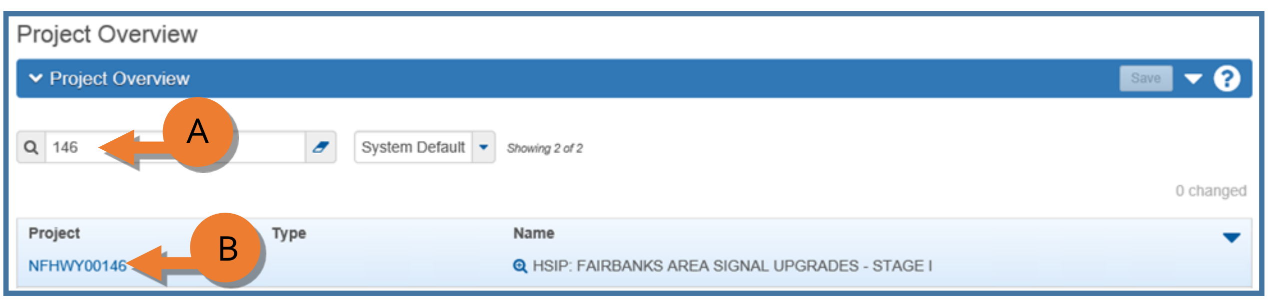


Figure 3.4

The Project Summary component will appear (*Figure 3.5*):

4. (C) Modify the **Project Name** to mixed caps and double check the **Description of Work** and make any modifications necessary.
5. (D) From the **Item List** dropdown, select the appropriate item list for your project.
   NOTE: Item lists are NOT spec books. This list will determine which items you are able to add to your project. There are four (4) item lists: Highways (which contains highway items, facilities items, and marine highway terminals items), Aviation (which includes aviation items and facilities items), and AMHS-Vessels (which is for marine highway vessels items only), and Public Facilities (for standalone PF projects).
6. (E) Click **<Save>**.

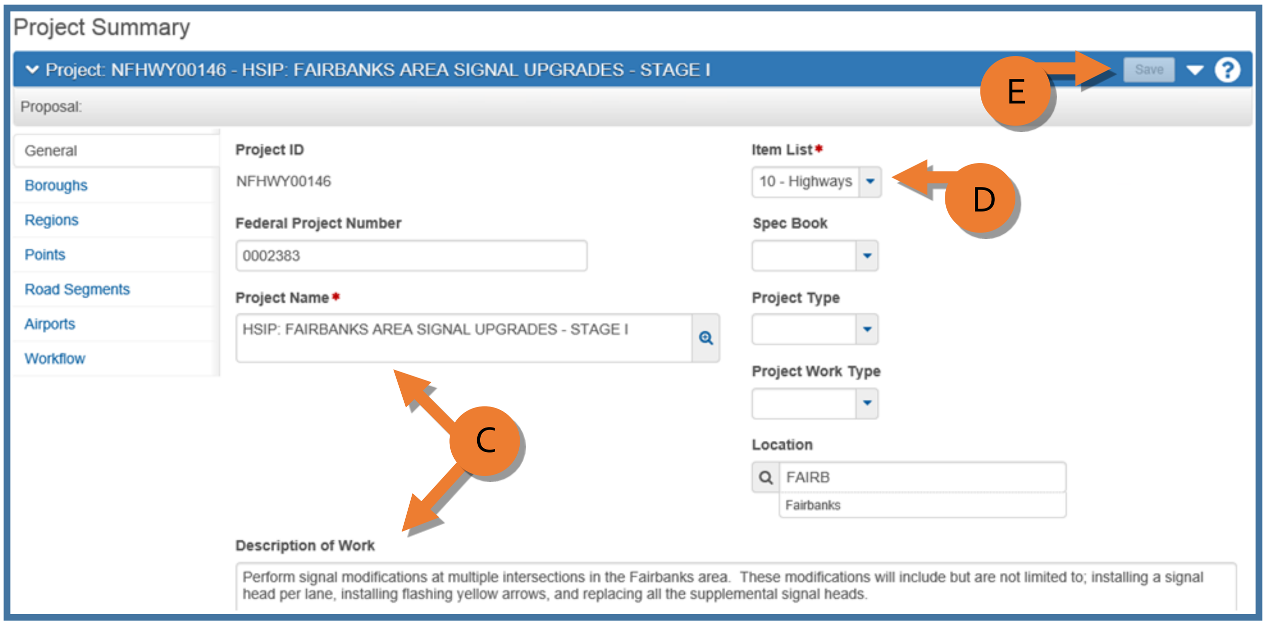


Figure 3.5

Changing the Project Workflow and Adding / Editing Tentative Advertising Info

Once the above detailed steps for either starting a project from scratch or initiating a project transferred from MRS, contact your Design Manager who will log into AWP in the ***Proposal User*** role to change the workflow phase to **Proj Design & Review** (*Figure 3.5 - Figure 3.7*). The project will remain in this workflow phase until the PS&E package has gone through review and is ready to be added to a letting to be advertised.

For projects created from scratch, the Proposal User role will also add information to the Tentative Advertising fields on the Project Summary component.

NOTE: The Proposal User role has minimal access to the Project area of AWP – just enough to change the workflow phase and populate tentative advertising information fields.

1. Log into AWP and make sure the ***Proposal User*** role is selected. (*Figure 3.6*)
2. (A) In the Project Overview component, search for your project. NOTE: A minimum of a three (3) character string is required for the system to search. You can search by Project ID (State/IRIS number) or the Project Name.
3. (B) Click the **Project ID** link to open the project.

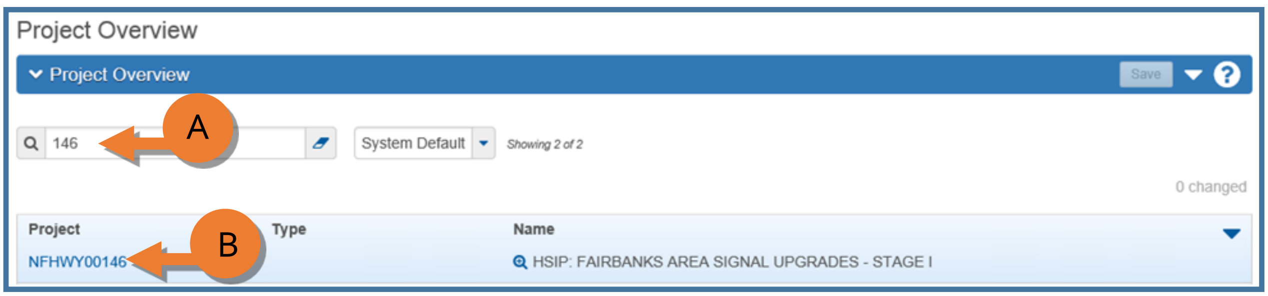


Figure 3.6

4. (C) From the Project Summary component, select the **Workflow** tab (*Figure 3.7*).

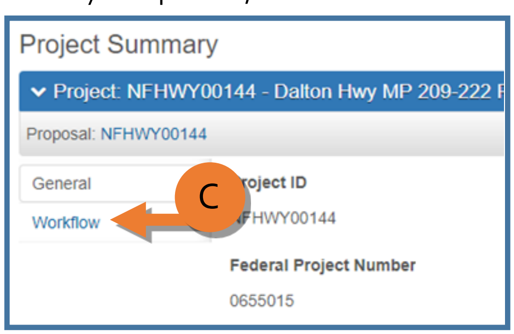


Figure 3.7

(*Figure 3.8*)

5. (D) From the **Workflow** dropdown, select **Alaska DOT&PF**.
6. (E) From the **Workflow Phase** dropdown, select **Proj Design & Review**.
7. (F) Click **<Save>**.

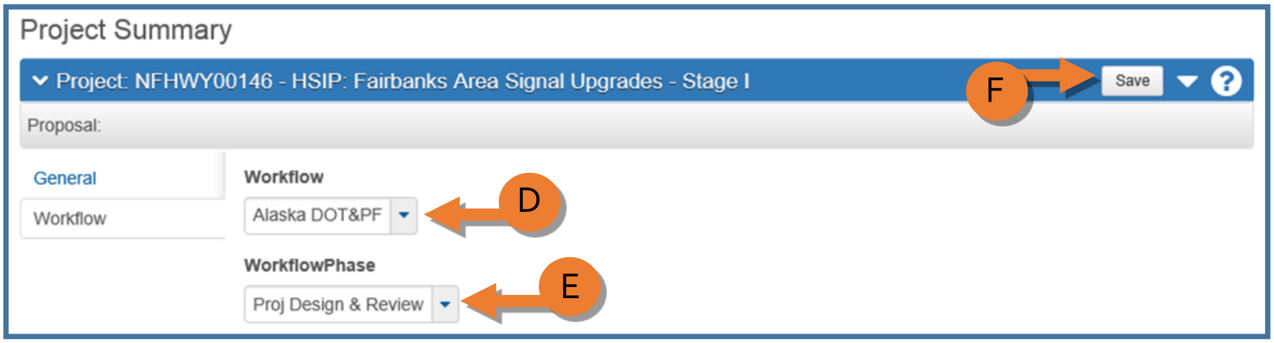


Figure 3.8

To add or update Tentative Advertising Info (*Figure 3.9 and Figure 3.10*):

1. Log into AWP and make sure the ***Proposal User*** role is selected. (*Figure 3.9*)
2. (A) In the Project Overview component, search for your project. NOTE: A minimum of a three (3) character string is required for the system to search. You can search by Project ID (State/IRIS number) or the Project Name.
3. (B) Click the **Project ID** link to open the project.

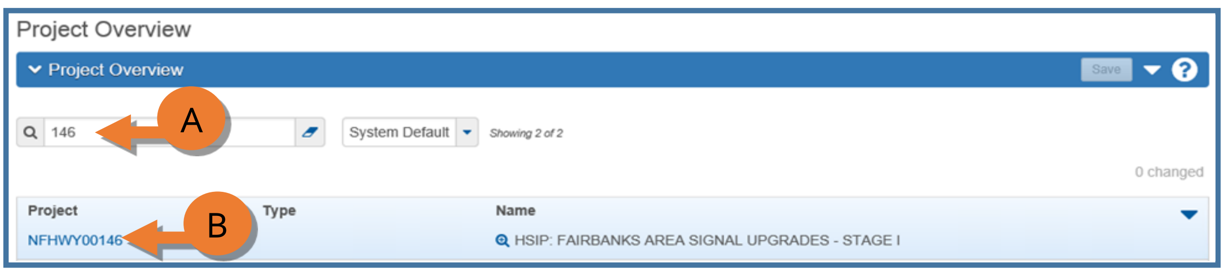


Figure 3.9

The Project Summary component will appear (*Figure 3.10*).

4. (C) From the **Tentative Advertise Month** dropdown, select the appropriate month.
5. (D) From the **Tentative Advertise Year** dropdown, select the appropriate year.
6. (E) In the **Project Manager Phone Number** field, enter the Design Manager's phone number that will appear on the TAS.
7. (F) In the **Tentative Advertise Additional Info** field, enter information that should be included in the tentative advertisement on the TAS webpage.
8. (F) Click **<Save>**.

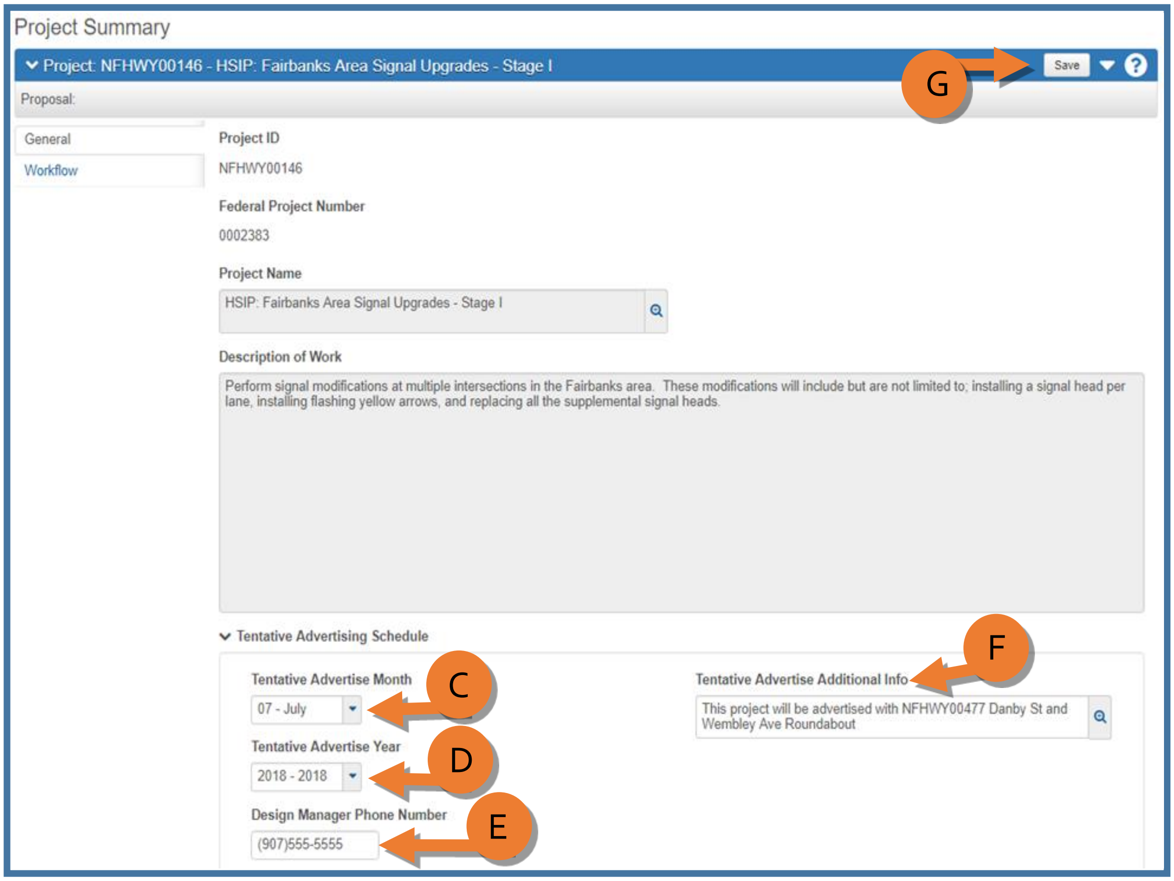
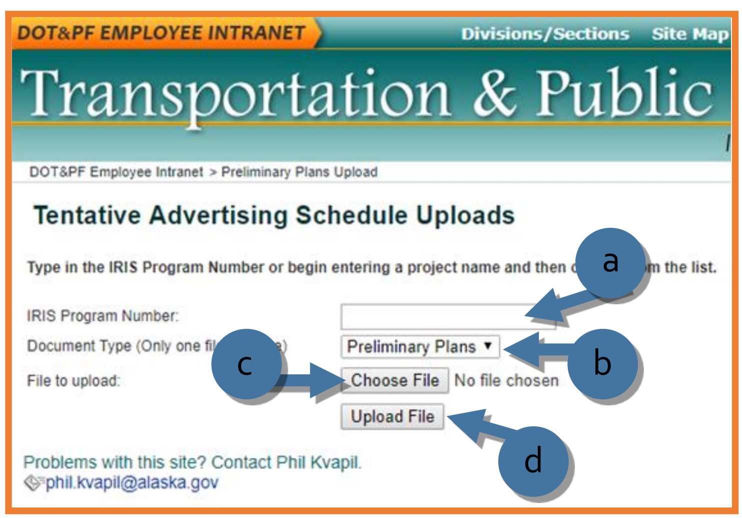


Figure 3.10

If you need to attach a file to the tentative advertisement, go to this site: http://web.dot.state.ak.us/nreg/design/awp_prelim/

- (a) In the **IRIS Program Number** field, search for and select your project.
- (b) Select the type of attachment:
  - Preliminary Plans
  - Cross Sections
  - Reports
- (c) Click **Choose File**, search for and select the file you want to upload.
- (d) Click **Upload File**.



Adding or Editing General Project Information

As stated at the beginning of this chapter, the Project User is the role used to create or edit project information and items (the engineer's estimate).

Creating/Modifying a project:

1. Log into AWP and make sure the ***Proposal User*** role is selected. (*Figure 3.11*)
2. (A) In the Project Overview component, search for your project. NOTE: A minimum of a three (3) character string is required for the system to search. You can search by Project ID (State/IRIS number) or the Project Name.
3. (B) Click the **Project ID** link to open the project.

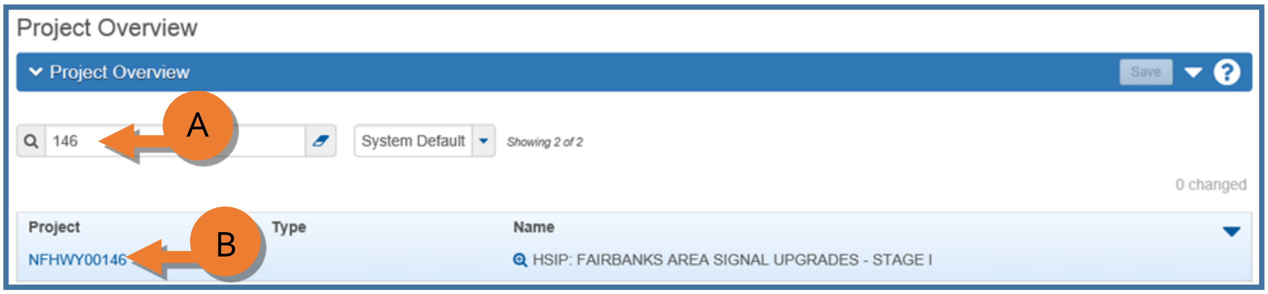


Figure 3.11

The Project Summary component will appear (*Figure 3.12*).

1. The project opens up in the Project Summary **General** tab.
   Complete the fields using the field tool tips or the Project Summary Data Fields table at the end of this chapter for guidance. Keep in mind that fields may be filled out at different times as the project progresses through the design phase. If your project was transferred from MRS, some data fields will already be populated. Please confirm the data entered is correct. Data imported from MRS can be changed if necessary.
2. Click **<Save>**.

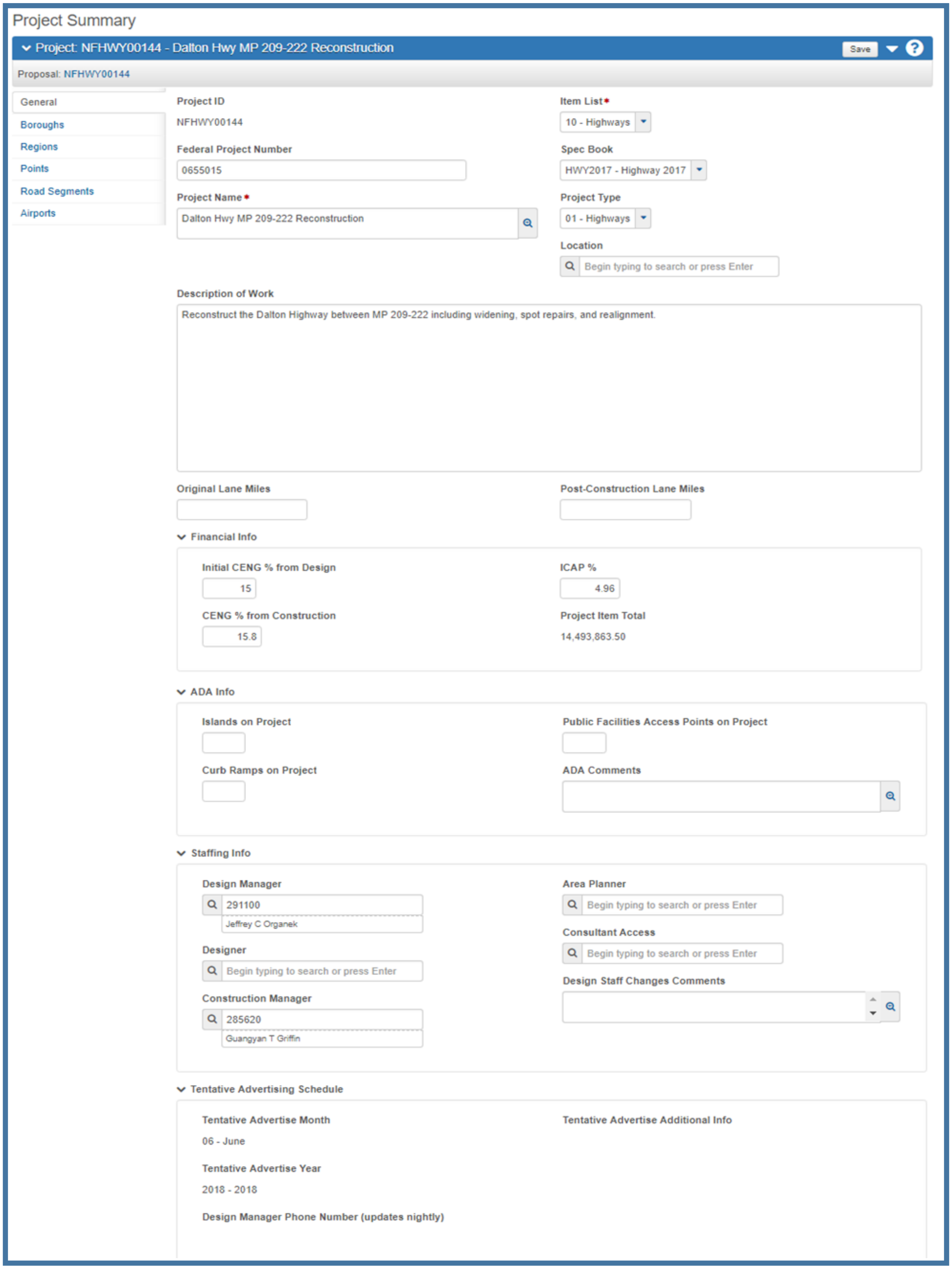

Project Summary
Project: NFHWY00144 - Dalton Hwy MP 209-222 Reconstruction
Save
Proposal: NFHWY00144
General
Boroughs
Regions
Points
Road Segments
Airports
Project ID
NFHWY00144
Item List
10 - Highways
Federal Project Number
0655015
Spec Book
HWY2017 - Highway 2017
Project Name
Dalton Hwy MP 209-222 Reconstruction
Project Type
01 - Highways
Location
Begin typing to search or press Enter
Description of Work
Reconstruct the Dalton Highway between MP 209-222 including widening, spot repairs, and realignment.
Original Lane Miles
Post-Construction Lane Miles
Financial Info
Initial CENG % from Design
15
ICAP %
4.96
CENG % from Construction
15.8
Project Item Total
14,493,863.50
ADA Info
Islands on Project
Public Facilities Access Points on Project
Curb Ramps on Project
ADA Comments
Staffing Info
Design Manager
291100
Jeffrey C Organek
Area Planner
Begin typing to search or press Enter
Consultant Access
Begin typing to search or press Enter
Designer
Begin typing to search or press Enter
Design Staff Changes Comments
Construction Manager
285620
Guangyan T Griffin
Tentative Advertising Schedule
Tentative Advertise Month
06 - June
Tentative Advertise Additional Info
Tentative Advertise Year
2018 - 2018
Design Manager Phone Number (updates nightly)

Figure 3.12

Adding or Editing Boroughs

To add a Borough:

1. From the Project Summary component (*Figure 3.13*):
2. (A) Select the **Boroughs** tab.
3. (B) Click the **<New>** button.
4. (C) In the **Borough ID** field, search for and select the borough name or area if the project work will be performed outside of formal borough limits and the name will appear. If you are unsure of the outside borough area choices, put your cursor in the field and hit the **<Enter>** key to display the data list.
5. (D) In the **Percentage** field, enter the approximate percentage of the project that falls within that borough or area. NOTE: The sum of the borough percentages on a project must equal 100%. If boroughs are added or deleted from the Project record, remember to adjust the percentages so as to always equal 100%.
6. (E) Check the **Primary** checkbox if this is the primary borough or only borough for this project.
7. (F) Click **<Save>**.
8. Repeat steps 3 – 7 to add more borough records if the project lies in multiple boroughs/areas.

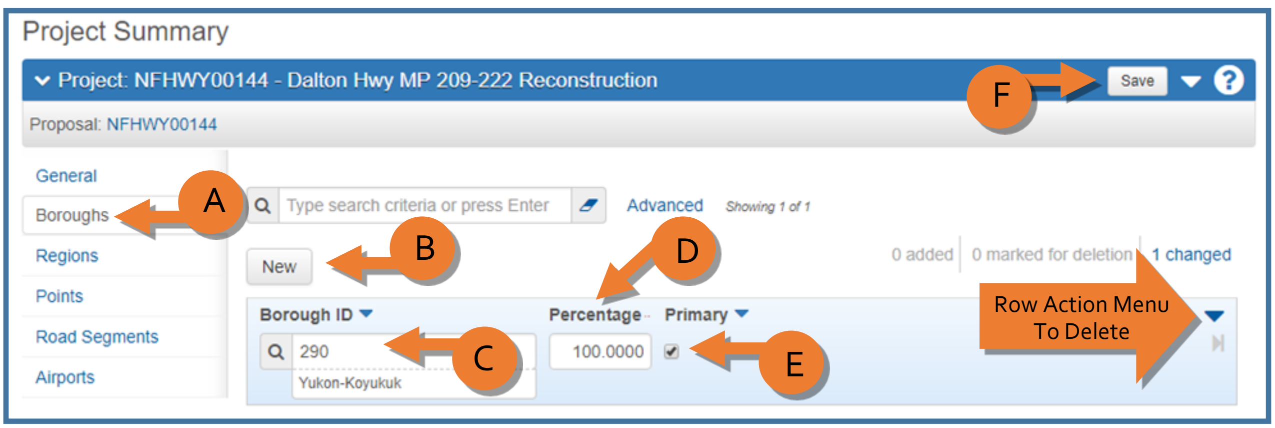


Figure 3.13

To modify a borough record imported from MRS (or created earlier) it is not necessary to delete the existing borough record and create a new one. Simply modify the existing record (see *Figure 3.13* above):

1. (C) Remove the data within the **Borough ID** search field and begin typing the correct borough/area name and the name will appear.
2. (D) Modify the **Percentage** data as necessary.
3. (E) Modify the **Primary** data as necessary.
4. (F) Click **<Save>**.

To delete a borough record:

1. On the Project Summary Boroughs tab, locate the borough record you want to delete.
2. Expand the **row actions menu** on the right side and select **Delete** (see *Figure 3.13*). The borough record is marked for deletion and users may "undo"  the action until the user clicks **<Save>**.

Adding or Editing Regions

In the Project Summary, select the **Regions** tab to add, edit, or delete regions within the project limits.

To add a region:

1. From the Project Summary component (*Figure 3.14*):
2. (A) Select the **Regions** tab.
3. (B) Click the **<New>** button.
4. (C) In the **Region ID** field, search for and select the appropriate region.
5. (D) Check the **Primary** checkbox if this is the primary region or only region for this project.
6. (E) If applicable, in the **Maintenance District** field, enter the maintenance district or primary maintenance district in which the project lies. Leave the field blank for other types of projects for which M&O will not take over maintenance once construction is complete.
7. (F) Click **<Save>**.
8. Repeat steps 3 – 7 to add more borough records if the project lies in multiple boroughs/areas.

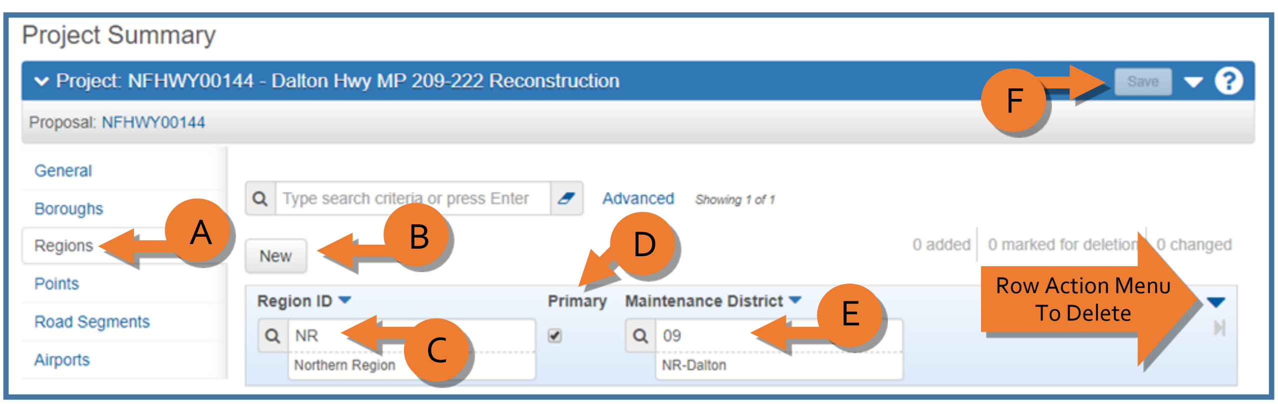


Figure 3.14

To modify a region record imported from MRS (or created earlier) it is not necessary to delete the existing region record and create a new one. Simply modify the existing record (see *Figure 3.14*):

1. (C) Remove the data within the **Region ID** field and begin typing the correct region name and the name will appear.
2. (D) Modify **Primar**y data as necessary.
3. (E) Edit the **Maintenance District** if applicable.
4. (F) Click **<Save>**.

To delete a region record:

1. On the Project Summary Regions tab, locate the region record you want to delete (see *Figure 3.14*).
2. Expand the **row actions menu** on the right side and select **Delete**. The region record is marked for deletion and users may "undo" the action until the user clicks **<Save>**.

Adding or Editing Points

A project point is a location that can be described by a single latitude and longitude measurement and is used to locate a specific site for project work, the site of a bridge, or a portion of the project's work. The **Midpoint** type is the only Point type required for every project. Other point types are: BOP (Beginning of Project), EOP (End of Project), and Bridge. Though BOP and EOP points are not required, if available, they may be useful for future reference.

1. From the Project Summary component (*Figure 3.15*):
2. (A) Select the **Points** tab.
3. (B) Click the **<New>** button.
4. (C) In the **Type** dropdown list, select **Midpoint** or other type of point you want to add.
5. (D) Click the **<Get Lat/Long>** button.
    a. iTouchMap will open in another browser window tab (*Figure 3.16*).
    b. Enter the address or approximate location. Click **<Go>**.
    c. Navigate to find your project Midpoint, EOP, BOP, or Bridge location.
    d. (E) Copy the **Latitude** and **Longitude** values to the associated fields on the Points tab. Enter all longitude numbers as a positive value.
6. (F) Enter a description for the point. NOTE: For **Bridge** point types, enter the Bridge # in the description field.
7. (G) Click **<Save>**.

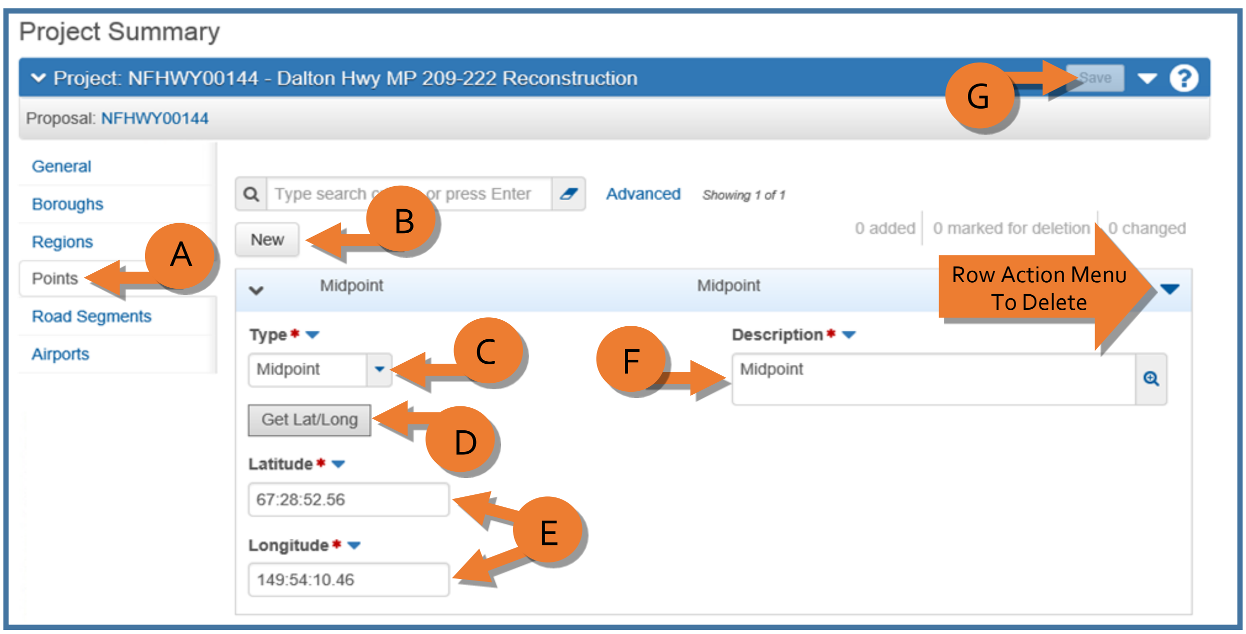


Figure 3.15

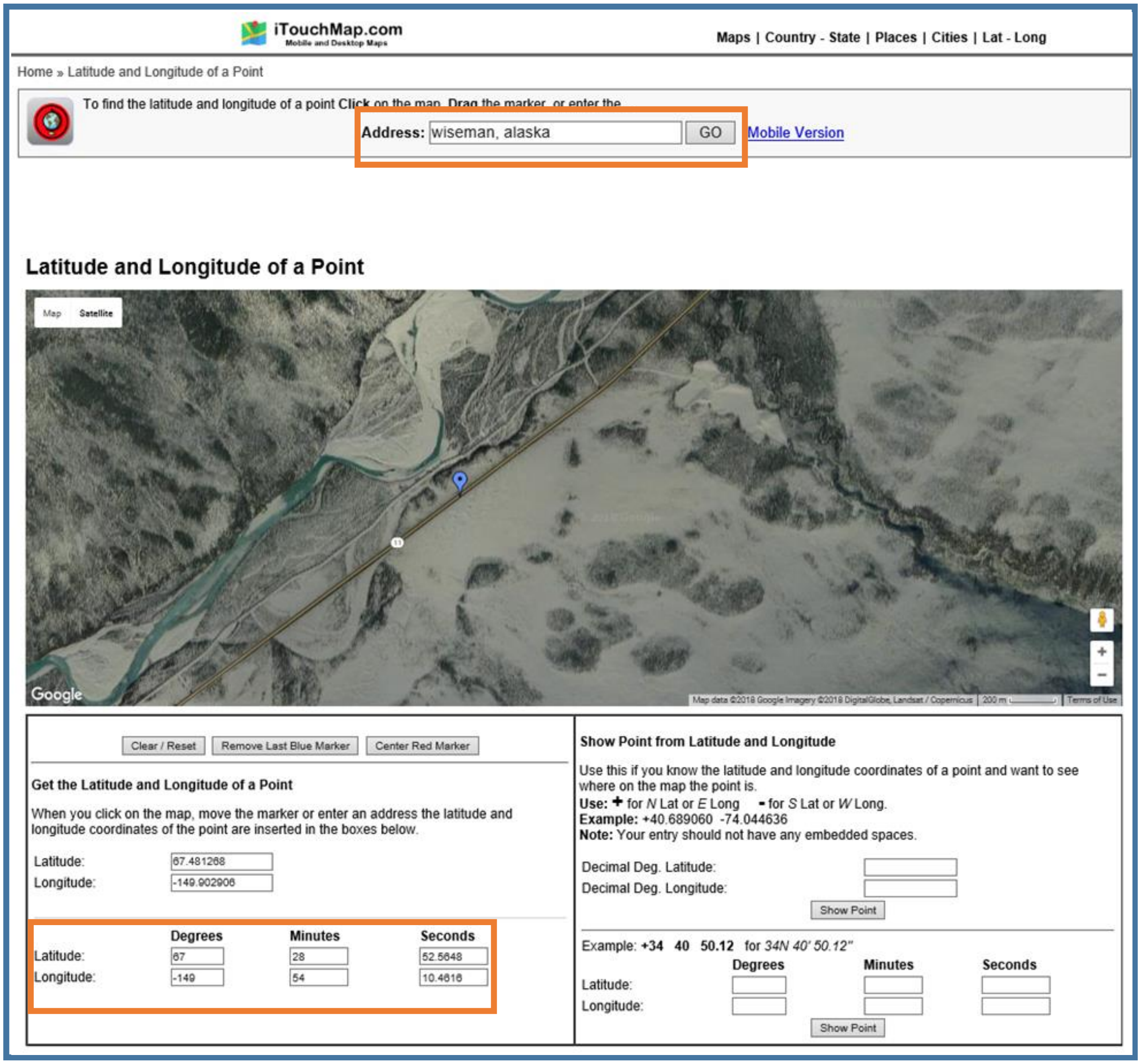


Figure 3.16

If a point record needs to be changed, it is not necessary to delete the existing point record and create a new one. Simply modify the existing record as needed and click **<Save>**.

To delete a point record:

1. Locate the point record you want to delete.
2. Expand the **row actions menu** on the right side and select **Delete** (see *Figure 3.15*). The point record is marked for deletion and users may "undo"  the action until the user clicks **<Save>**.

Adding or Editing Road Segments

A road segment is a portion of a road that can be described by specific route type/ID number or milepoint information. A project may contain one or multiple road segments. Road segment information matches that on the project's ePID document. The ePID will contain all the information required for this tab.

1. In the Project Summary component (*Figure 3.17*):
2. (A) Select the **Road Segments** tab.
3. (B) Click the **<New>** button.
4. (C) Enter the **Route ID#**.
5. (D) Enter the **Federal Route #.**
6. (E) Enter the **NBI #**.
7. (F) From the **NHS** dropdown, select Y or N as applicable.
8. (G) Enter the **Begin Milepoint**.
9. (H) Enter the **End Milepoint**.
10. (I) From the **Urban ID** dropdown, select the appropriate Urban ID.
11. (J) Click **<Save>**.

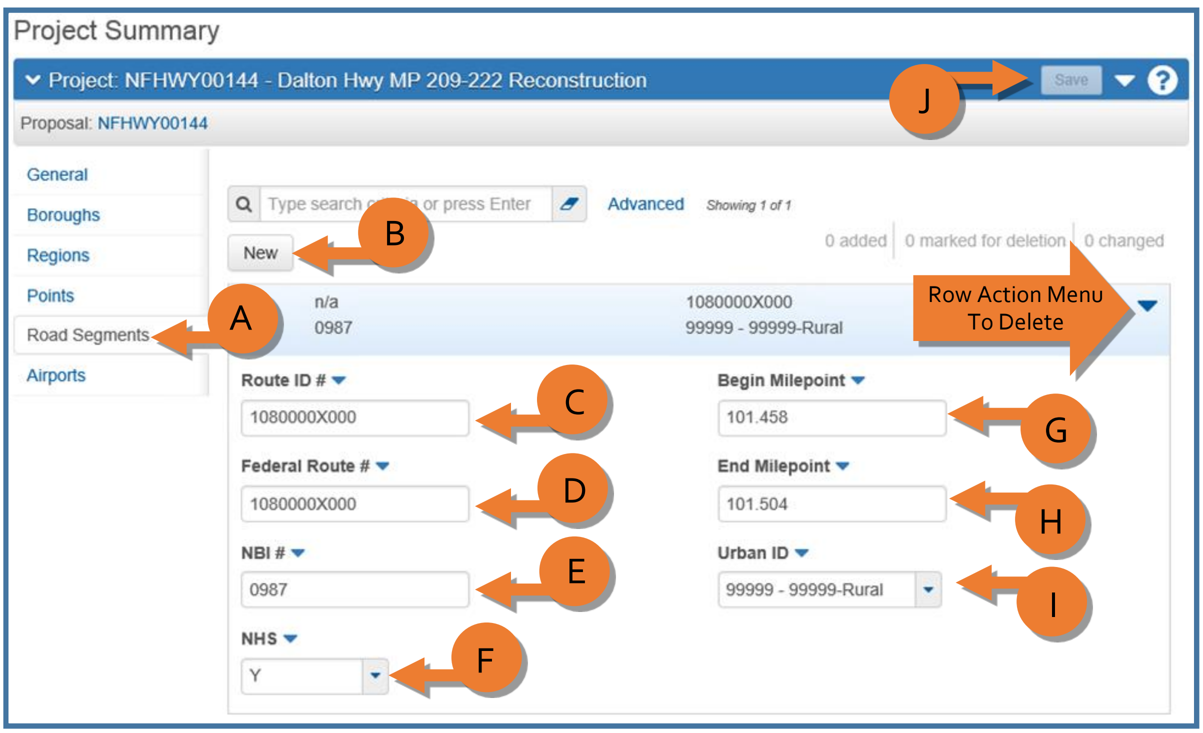


Figure 3.17

If a road segment record needs to be changed, it is not necessary to delete the existing road segment record and create a new one. Simply modify the existing record as needed and click **<Save>**.

To delete a road segment record:

1. Locate the road segment record you want to delete.
2. Expand the **row actions menu** on the right side and select **Delete** (see *Figure 3.17*). The road segment record is marked for deletion and users may "undo" the action until the user clicks **<Save>**.

Adding or Editing Airports

If your project includes work on an airport or airports, add them to the project record.

To add an airport to the project:

1. From the Project Summary component (*Figure 3.18*):
1. (A) Select the **Airports** tab.
2. (B) Click the **<New>** button.
3. (C) In the **Airport ID** search for airport by the city/town/village in which the airport is located or the airport name and select the appropriate airport.
4. (D) Click **<Save>**.
5. Repeat steps 2 – 4 to add more airport records to the project.

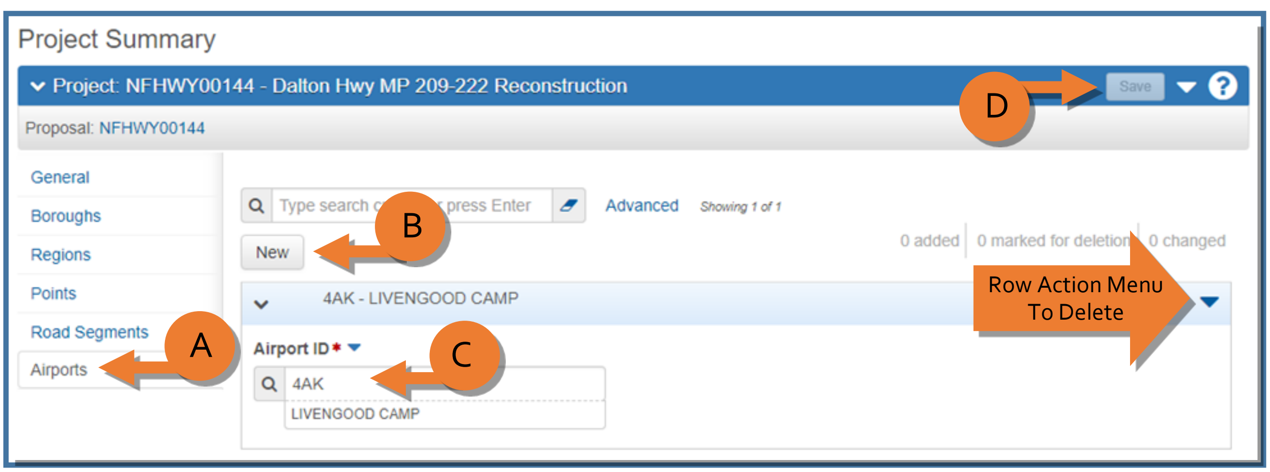


Figure 3.18

If an airport record needs to be changed, it is not necessary to delete the existing airport record and create a new one. Simply modify the existing record (see *Figure 3.18*).

1. (C) Remove the data within the **Airport ID** field and begin typing the correct airport name and the name will appear.
2. (D) Click **<Save>**.

To delete an airport record

1. Locate the airport record you want to delete.
2. Expand the **row actions menu** on the right side of the airport record and select **Delete** (see *Figure 3.18*). The airport record is marked for deletion and users may "undo"  the action until the user clicks **<Save>**.

Categories

Categories are used to group items as required by the type and complexity of the project. Category choices are: Basic Bid, Additive Alternate, or NTP.

To add a category:

1. On the top of the Project Summary component, select the **Categories and Items** quick link to add, edit, or delete categories (*Figure 3.19*).

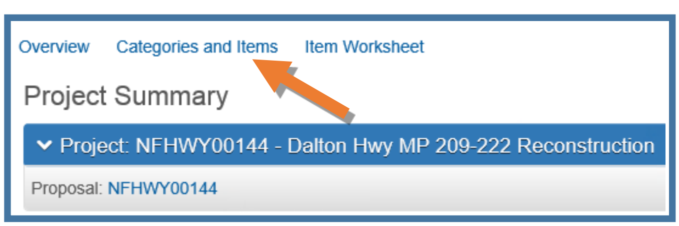


Figure 3.19

The Project Category and Item Summary component will appear (*Figure 3.20*).

2. (A) Select the **Categories** tab.
3. (B) Click the **<New>** button.
4. From the **Category ID** dropdown, select the appropriate category.
5. **Combine Like Categories**: This applies to projects that will be advertised with one or more additional projects. This function allows multiple categories with the same Category ID (and the associated pay items) to combine into one category at the Proposal level. For example, if a Proposal has two Projects on it and the Basic Bid categories for both projects have the Combine Like Categories boxes checked, the items from both Basic Bid categories will combine to make one section on the bid schedule. If a Proposal has two Projects, each with its own Basic Bid category, but the Combine Like Items boxes are not checked, then the items appear in separate Basic Bid sections on the bid schedule. If a Proposal has only one Project on it, the Combine Like Categories box becomes a non-issue as there will never be two identical categories on the same project.
6. Click **<Save>**.
7. Repeat steps 3 – 6 to add additional categories.

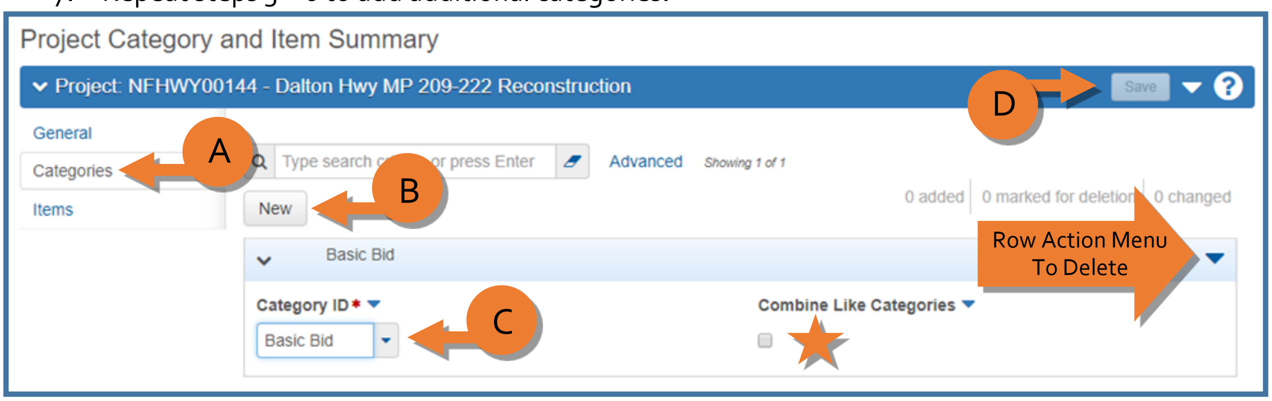


Figure 3.20

If a Category ID needs to be changed, it is not necessary to delete the existing category and create a new one. Simply reselect the Category ID and click **<Save>**.

To delete a category:

8. Expand the **row actions menu** on the right side of the category record and select **Delete** (see *Figure 3.20*). The category is marked for deletion and users may "undo" the action until the user clicks **<Save>**.

Items

Items are added to the project and associated to a category. There are two ways to add items to the project. The Item Worksheet and the Items tab. The Item Worksheet is the primary way most users will add items to the project. It is a grid that appears similar to an excel spreadsheet and is an easy way to add or edit basic item information. The Items tab allows users to add items one at a time, but also contains more information about the item. Most users will add items by Item Worksheet and add extra information in the Items area. Reminder: Save often when adding items to your project.

To find historical bid information to create estimates, you will use Bid Tab and the Find Bid Data function of AWP. To look up bid data in the Find Bid Data component, see the next section.

Note about Furnished Material items: There are two types of furnished material items. The first type are those that are for the installation or placement of furnished material and appear on the bid schedule for contractors to bid on the amount of the installation or placement. These will have "placement" or "installation" in the item name. The second type are those that are what the Department or furnishing agency (i.e. Railroad) paid for the material for the contractor to then install or place and do not appear on the bid schedule for contractors to bid on and do not have CENG applied. If you have furnished material on your project, coordinate with your design manager and a module administrator for assistance if needed.

NOTE: If the item you need does not appear in the list, contact a Module Administrator to add it to the system.

Adding Items by Item Worksheet

1. Navigate to the Project Summary component from the Project Overview on the Dashboard.
2. Select the **Categories and Items** quick link at the top of the Project Summary component screen (see *Figure 3.19*).
3. Select the **Item Worksheet** quick link at the top of the Project Category and Item component screen (*Figure 3.21*).

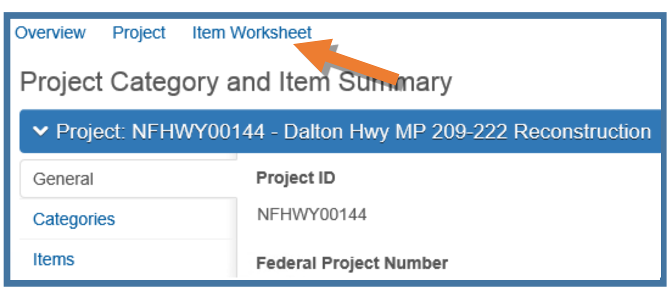


Figure 3.21

The Item Worksheet grid consists of eleven columns:

Category: The category created earlier to which the item belongs.

Line Number: A sequential number assigned to the item by the system.

Item: The standard or regional special pay item number.

Description: The description associated with the item number.

Supp Descr Instructions: Instructions as to what information is required in the Bid Sched Supp Descr field for this item.

Bid Sched Supp Description: An additional description for the item, sometimes a required field if the item description needs a specific piece of information added (such as pipe gauge). This supplemental description will appear on the bid schedule.

Roll Up Supp Description: To use when there are multiples of the same pay item that will be rolled up into one item on the bid schedule (roll up items must have the same unit price). This supplemental description will not appear on the bid schedule and is a means of distinguishing the multiples for design, funding assignment, and construction administration purposes. This field is used in conjunction with the Combine Like Items field.

Combine Like Items: This field should only be changed to yes (checked box) for multiples of the same pay item that will be rolled up into one item on the bid schedule. Combining like items allows for the design, funding assignment, and construction administration of multiples of the same pay item while allowing the contractor to bid on one item. This field is used in conjunction with the Roll Up Supp Description field.

Unit: The unit of measure by which the quantity was estimated.

Quantity: The estimated number of units of the item.

Price: The estimated unit price of the item.

Ext Amt: The extended amount is the product of the quantity and the unit price.

You can add items to your worksheet two ways, the Select Items button or the New button (*Figure 3.22*). The **<Select Items>** button allows you to add one item or add multiple items to your item worksheet at once. The **<New>** button allows you to add one item to your item worksheet at a time. Note: When searching items using the New button, the unit of measure for the item is not displayed.

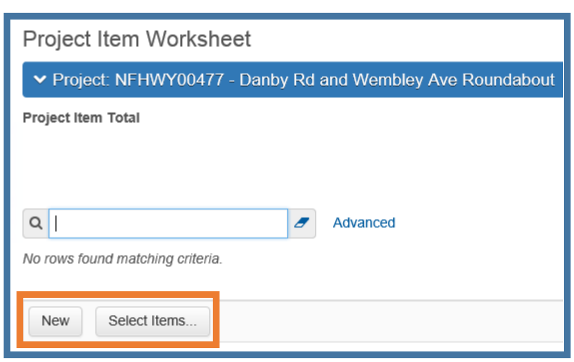


Figure 3.22

Select Items button *(Figure 3.23)*:

4. Click the **<Select Items>** button (See *Figure 3.22*).
5. (A) In the auto-complete item field, type at least 3 characters of the item number or description. Any item containing that string of 3 characters will appear.
6. (B) Select the item(s) you want to add, a green checkmark will appear next to the selected item. The number of items you have selected in total will appear in the upper right.
7. (C) You can search for and select multiple items before clicking the **<Add to Project>** button on the lower right of the screen.

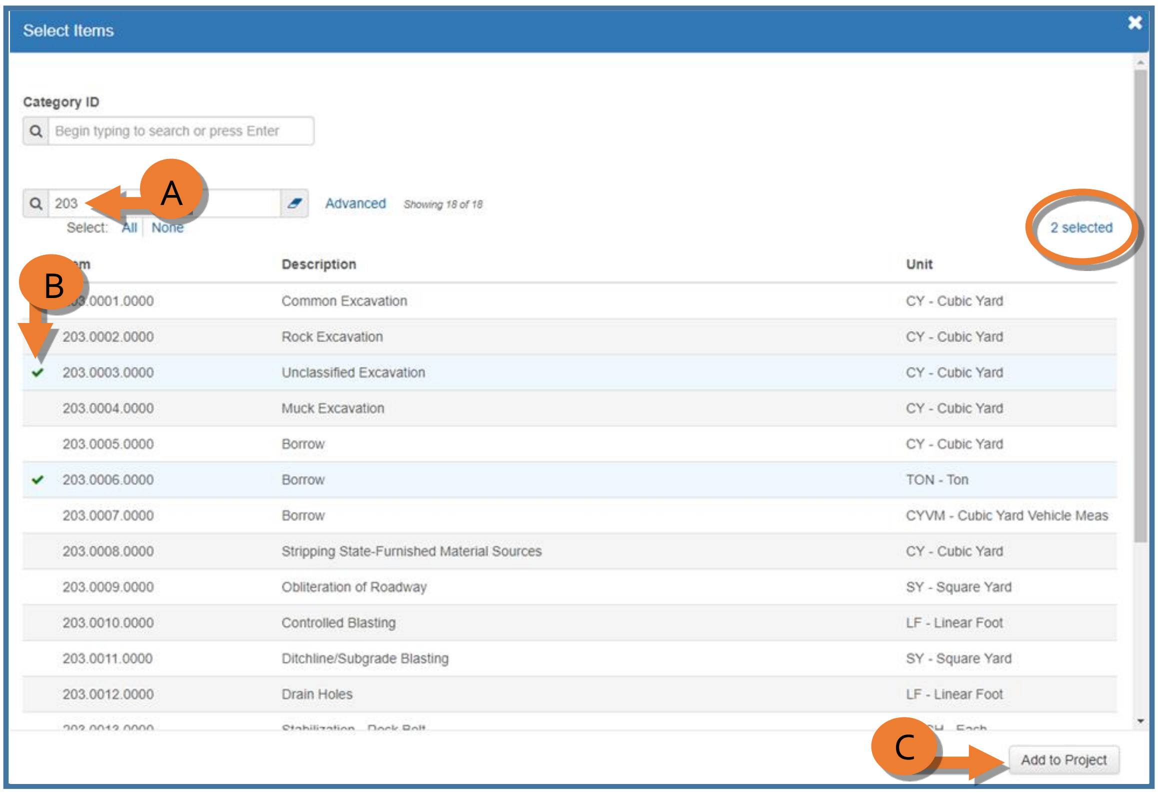


Figure 3.23

The items you selected will appear in the Item Worksheet grid (*Figure 3.24*).

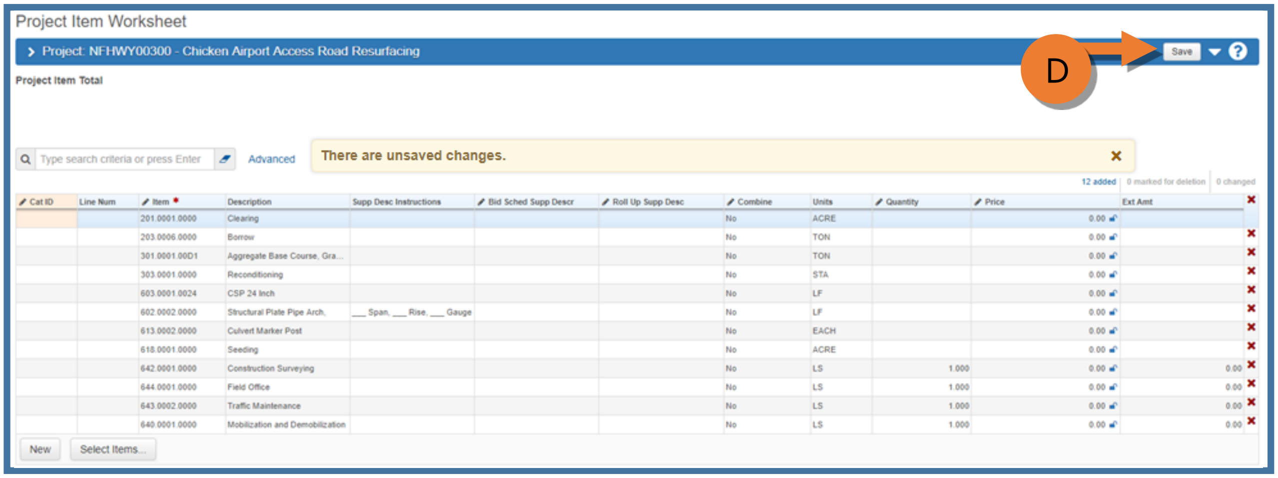


Figure 3.24

8. (D) Click **<Save>**.
   NOTES:
   - ➢ Lump sum item quantity fields will autopopulate with a quantity of 1.0. However, a warning message will appear regarding lump sum items needing to be between 0 and 1. You can ignore those warnings and close the warning box (*Figure 3.25*).
   - ➢ Continent sum item unit price fields will autopopulate with a unit price of $1.00. For contingent sum items, put the total dollar amount in the quantity field. This allows Construction to enter the amount to be paid to the contractor in the quantity field and allows flexibility to pay to the penny, which wouldn't be possible otherwise. If you have zero quantity contingent sum items, ignore any warnings in the yellow bar related to these items.

Figure 3.25

Enter in the remaining item information into your worksheet (*Figure 3.26*).

9. (A) Double click the **Category ID** field. Search for and select the appropriate category for the item.

NOTES:

- Rather than double-click each field in the item worksheet, you can **<Tab>** into the next field, hit **<Enter>** to open the field, enter your value, and **<Tab>** to the next field.
- If all your items belong to the same category, use the Range Fill option to populate the remaining category fields. Click the **blue down arrow** next to the CatID label check to fill all Rows and click **<Fill>** (see *Figure 3.25* inset).

10. (B) Double click and enter a **Bid Schedule Supplemental Description** if necessary or required (project items with a Bid Schedule Supp Description cannot roll up).
    a. Double click and enter a **Roll Up Supplemental Description** if there are multiples of the same pay item that will be rolled up into one item for bidding. This field does not appear on the bid schedule. Note: Must be used in conjunction with the Combine Like Items field
    b. Double click and check the **Combine Like Items** field if there are multiples of the same pay item that will be rolled up into one item for bidding. Note: Must be used in conjunction with the Roll Up Supplemental Description field.

    NOTE: At the project level, only ONE supplemental description type can be used. If a rolled up item also needs a bid schedule supplemental description, this can be added in Proposal once the project item has become a proposal item.

11. (C) Double click the **Quantity** field and enter the estimated quantity for the item, unless it is a lump sum item.
12. (D) Double click the **Price** field and enter the estimated unit price for the item, unless it is a contingent sum item.
13. (E) Click **<Save>**.
    NOTE: the Extended Amount field will calculate once you save.

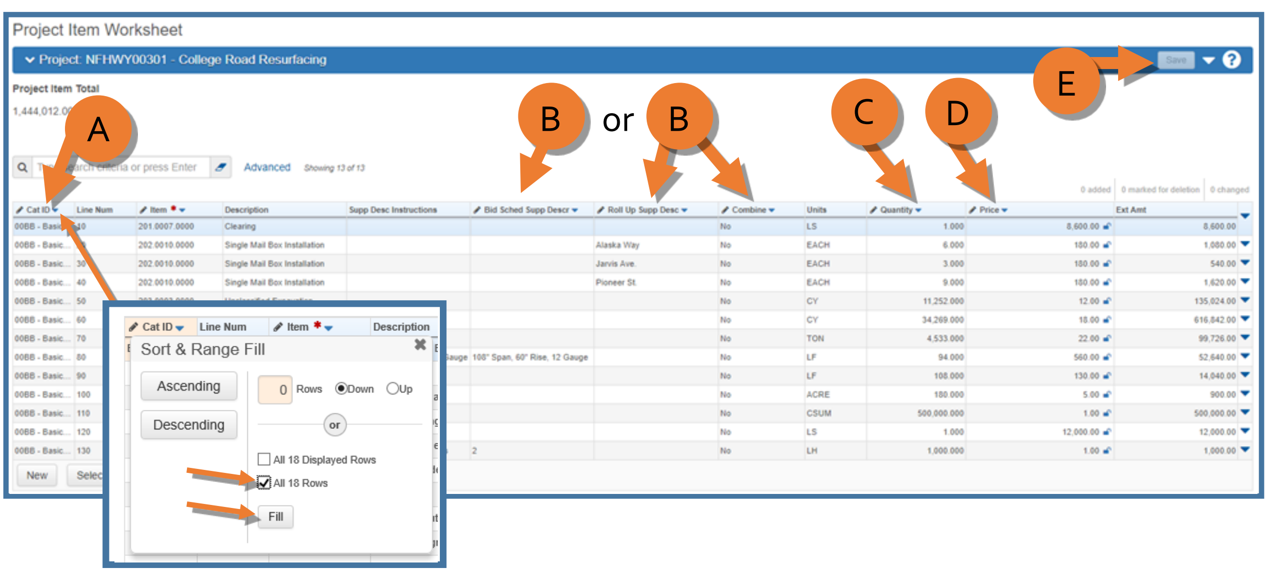


Figure 3.26

New button (*Figure 3.27*):

1. (A) Click the **<New>** button to create a blank new row.
2. (B) Double click the **Category ID** field. Search for and select the appropriate category for the item.
3. (C) Double click the **Item ID** auto-complete field. Type at least 3 characters of the item number or description. Any item containing that string of 3 characters will appear. Select the item you want to add.
4. (G) Click **<Save>**.
   NOTES:
   - Lump sum item quantity fields will autopopulate with a quantity of 1.0. However, a warning message will appear regarding lump sum items needing to be between 0 and 1. You can ignore those warnings and close the warning box (see *Figure 3.24*).
   - Continent sum item unit price fields will autopopulate with a unit price of $1.00. For contingent sum items, put the total dollar amount in the quantity field. This allows Construction to enter the amount to be paid to the contractor in the quantity field and allows flexibility to pay to the penny, which wouldn't be possible otherwise. If you have zero quantity contingent sum items, ignore any warnings in the yellow bar related to these items.
5. (D) Double click and enter a **Bid Schedule Supplemental Description** if necessary or required (project items with a Bid Schedule Supp Description cannot roll up).
   a. Double click and enter a **Roll Up Supplemental Description** if there are multiples of the same pay item that will be rolled up into one item for bidding. This field does not appear on the bid schedule. Note: Must be used in conjunction with the Combine Like Items field
   b. Double click and check the **Combine Like Items** field if there are multiples of the same pay item that will be rolled up into one item for bidding. Note: Must be used in conjunction with the Roll Up Supplemental Description field.

   NOTE: At the project level, only ONE supplemental description type can be used. If a rolled up item also needs a bid schedule supplemental description, this can be added in Proposal once the project item has become a proposal item.

6. (E) Double click the **Quantity** field and enter the estimated quantity for the item, unless it is a lump sum item.
7. (F) Double click the **Price** field and enter the estimated unit price for the item, unless it is a contingent sum item.
8. (G) Click **<Save>**.
   NOTE: the Extended Amount field will calculate once you hit **<Save>**.

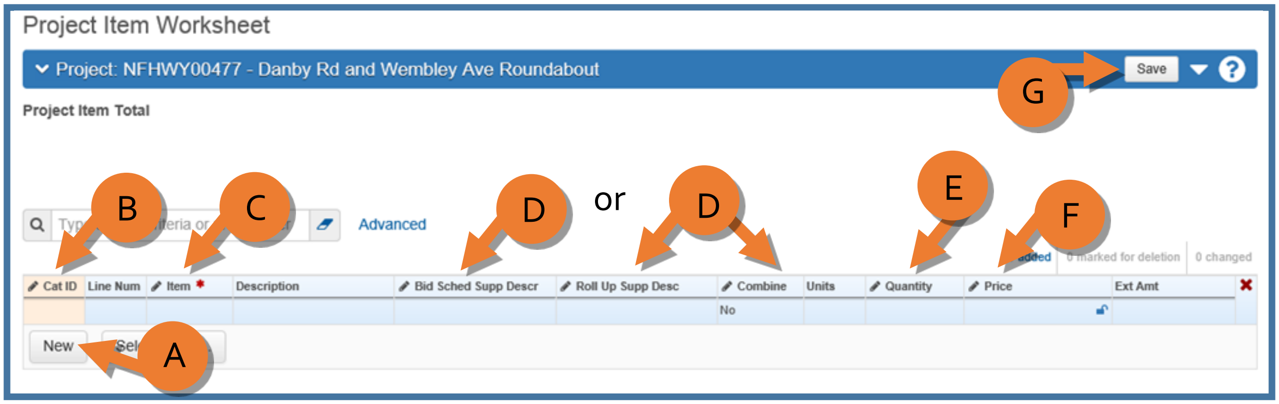


Figure 3.27

Item Worksheet Action Menu options (*Figure 3.28*):

Open the **row action menu** on the far right side of the item row.

1. To copy and paste an Item Worksheet row, click the **Copy icon** to copy the selected row. Open the **action menu** again and click the **Paste Below icon** to paste the copied row below.
2. To insert a blank new row above, click the **Insert New Row icon**. Populate the row by following the **New** button steps in the previous section.
3. To delete a worksheet item row, open the **action menu** and click the **Delete icon**. The item record is marked for deletion and users may "undo" the action until the user clicks **<Save>**.

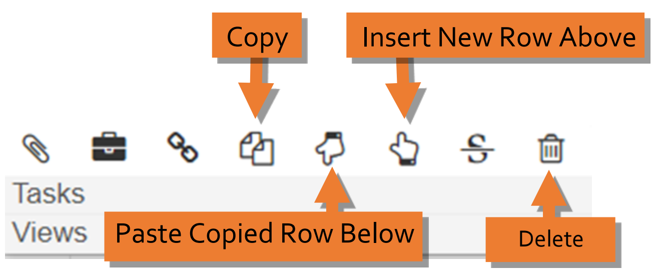


Figure 3.28

Item Worksheet extra tips/notes:

1. If after creating your initial items on your worksheet, you add an item that appears at the bottom of the list and is out of order, click **<Save>** and the items will reorder by item number.
2. As you build your worksheet, the **Project Item Total** above the worksheet will populate. This amount does not include CENG or ICAP.

Editing Items in the Item Worksheet:

1. Navigate to the Project Summary component from the Project Overview on the Dashboard.
2. Select the **Categories and Items** quick link at the top of the Project Summary component screen (see *Figure 3.19*).
3. Select the **Item Worksheet** quick link at the top of the Project Category and Item component screen (*Figure 3.21*).
4. Add, edit, delete any information necessary and click **<Save>**.

Adding Items in the Items tab:

1. Navigate to the Project Summary component from the Project Overview on the Dashboard.
2. Select the **Categories and Items** quick link at the top of the Project Summary component screen (see *Figure 3.19*).
3. (A) Select the **Items** tab (*Figure 3.29*).
4. (B) Click the **<New>** button.

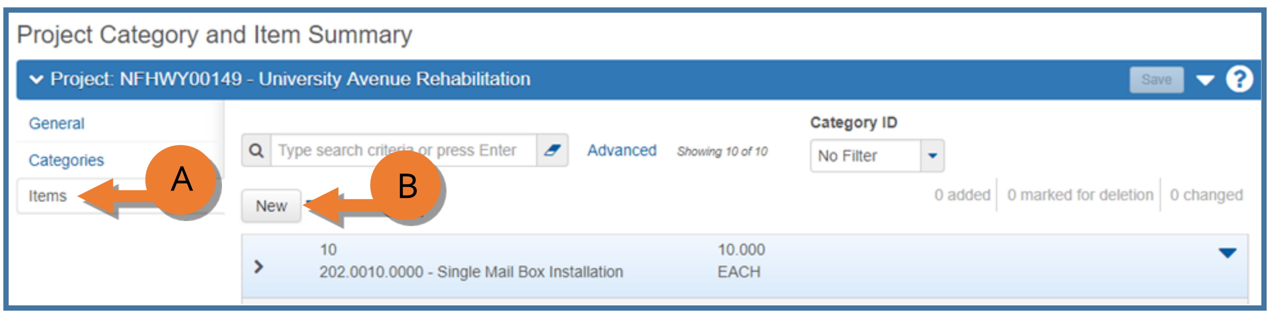


Figure 3.29

5. At the bottom of the component window, a New Project Item record will appear at the bottom of the item list (*Figure 3.30*). Refer to the Item Fields table at the end of this chapter for guidance on how to fill in the data fields. Required fields include Item ID, Quantity, Project Item Unit Price, Category ID and possibly the Bid Schedule Supplemental Description.

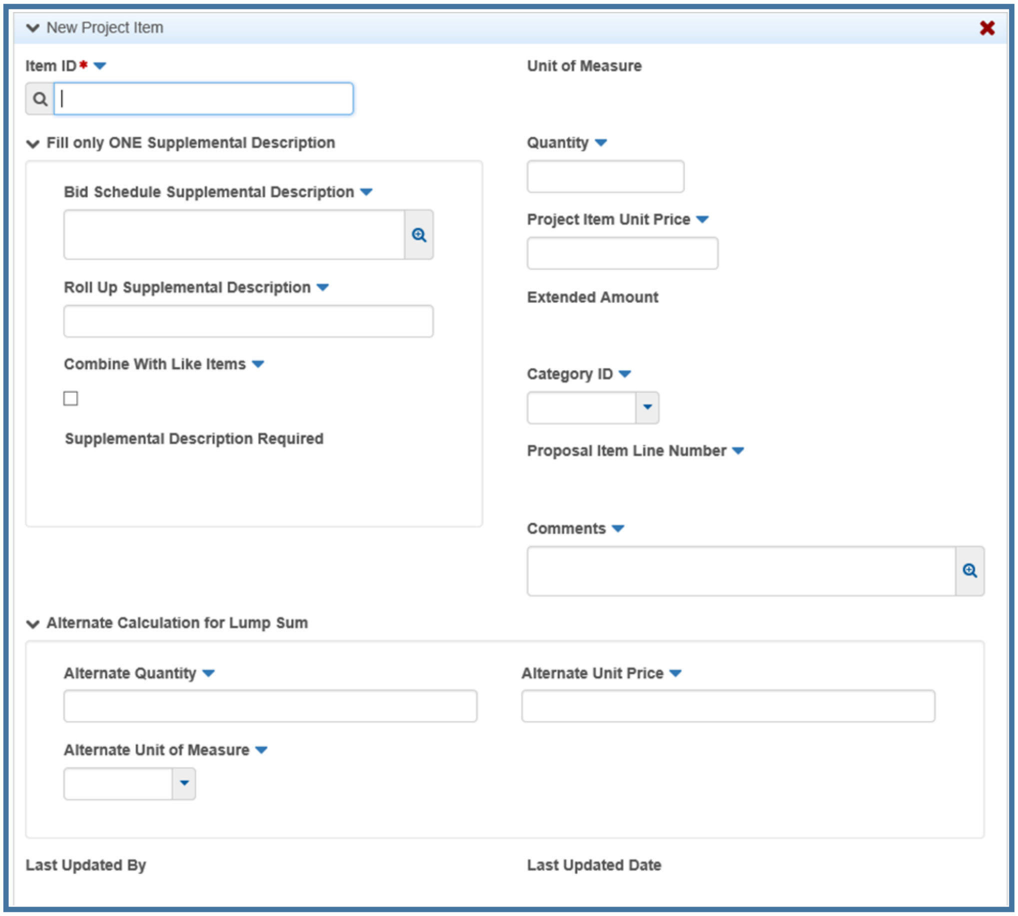


Figure 3.30

6. To add another item, click **<New>** and repeat.
   NOTE: All item information can be edited and resaved.

To delete an item in the item tab (*Figure 3.31*):

a. (A) Expand the **row actions menu** on the right side of the item record and (B) select **Delete**. The item record is marked for deletion and users may "undo" the action until the user clicks **<Save>**.

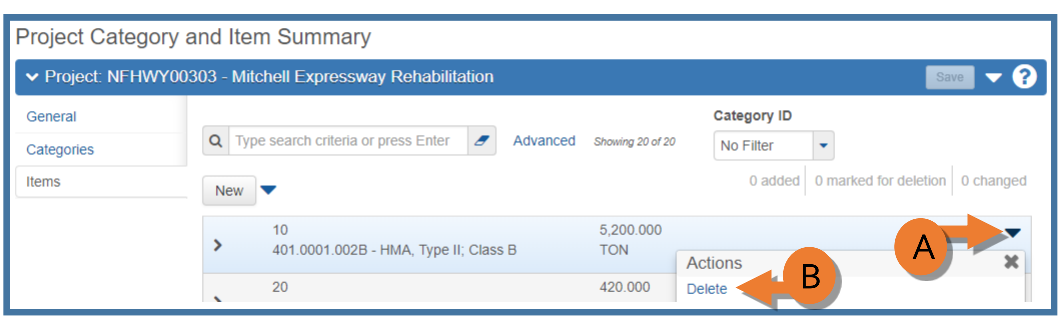


Figure 3.31

Editing Items in the Items tab:

1. Navigate to the Project Summary component from the Project Overview on the Dashboard.
2. Select the **Categories and Items** quick link at the top of the Project Summary component screen (see *Figure 3.19*).
3. Select the **Items** tab (*Figure 3.32*).
4. Click the **Expand/Collapse arrow** for an item.
5. Modify item information as necessary.
6. Click **<Save>**.

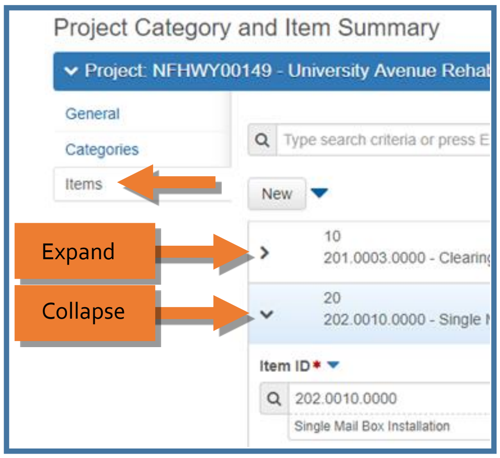


Figure 3.32

Find Bid Data

To look up historical bid data for projects that have been created in AWP, there is a Find Bid Data component on the dashboard for the Project User role (*Figure 3.33*).

(A) There are multiple ways to search for items:

1. In the auto-complete item field, type at least 3 characters of the item number, item description (name), or the name of the proposal. Any proposal with an item containing that string of 3 characters will appear. For example, if you are looking for projects with Unclassified Excavation, you can type in Exc or Unc in the field.
2. In the Bid Item field, enter 3 characters of the item number or item description.
3. From the Filter dropdown, select Advanced and build a filter to narrow down the list. For example, you may want to look up bid prices for an item in one region only.
4. Use a combination of the first three to really narrow down search results (*Figure 3.34*). See the Search, Sort and Filter section of chapter 2 for more information on building filters.

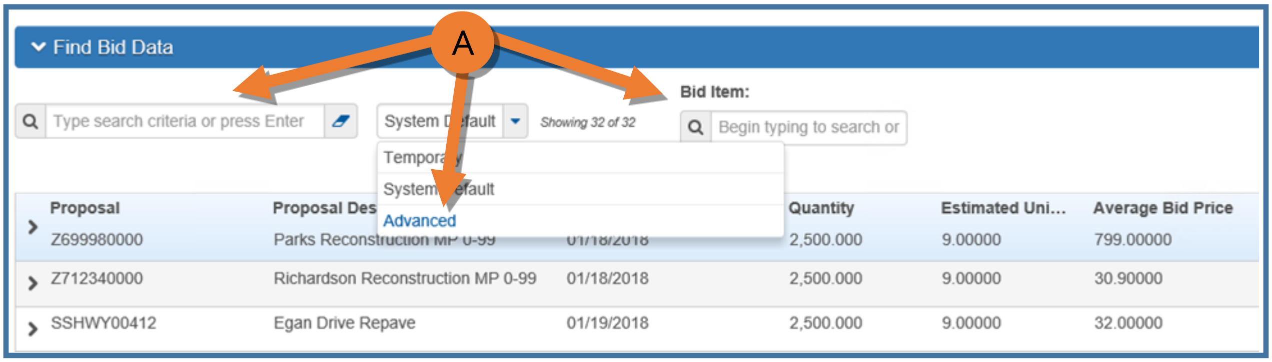


Figure 3.33

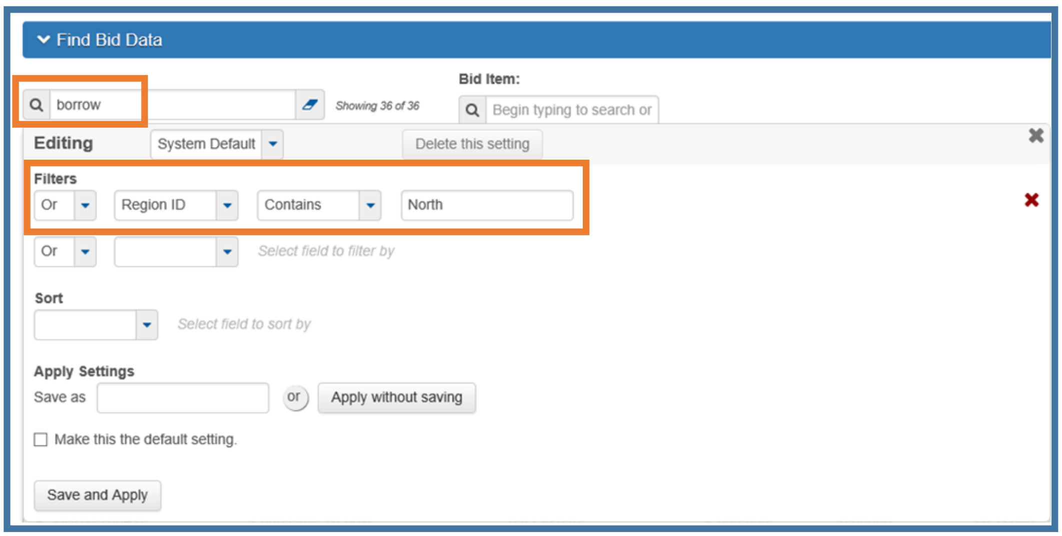


Figure 3.34

Once you have filtered to get your list, the average bid price for all bidders for that item on that proposal will appear (*Figure 3.35*). Click the expand arrow to view more information about the individual bids on that item.

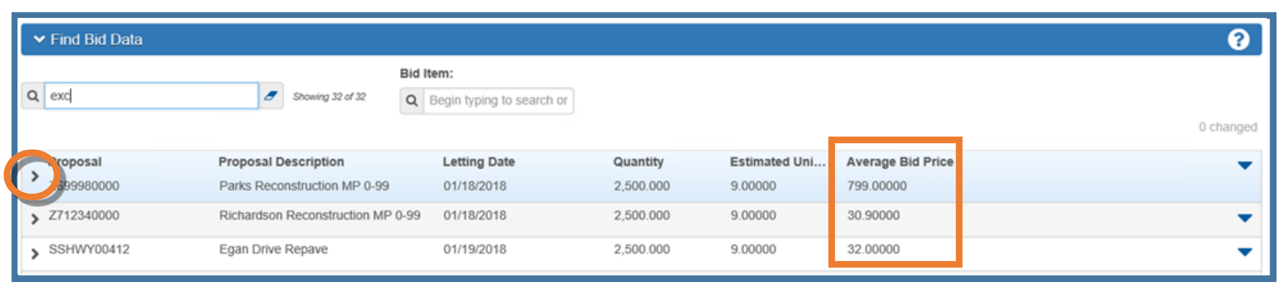


Figure 3.35

Generating the Project level Engineer's Estimate PDF report:

1. From the Project Overview component on the dashboard, search for and select your project. The Project Summary component will appear (*Figure 3.36*).
2. (A) Expand the Project Summary component **action menu** on the right side of the header.
3. (B) Select **Project Engineer's Estimate**.

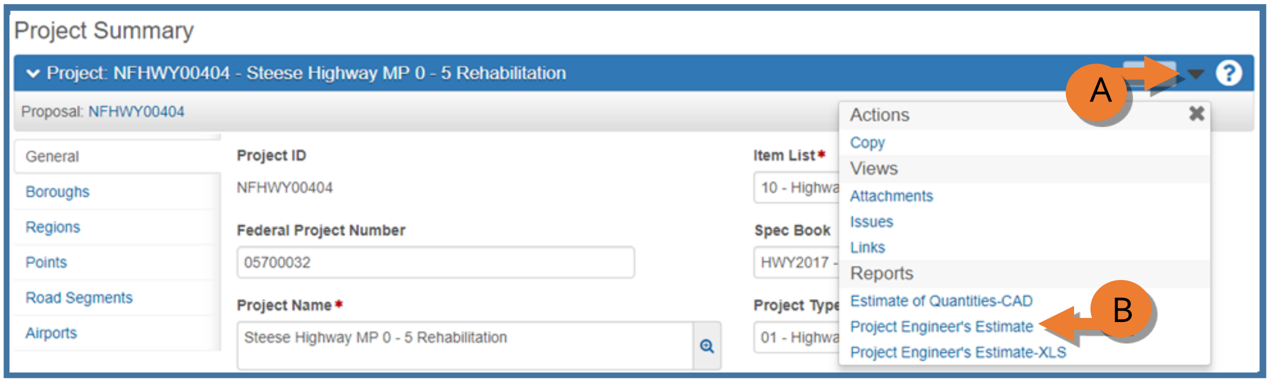


Figure 3.36

The Generate Report component will appear (*Figure 3.37*).

4. (C) In the **Estimate Description** field, enter the type of Engineer's Estimate.
5. (D) Uncheck the **Show Cost Estimate** report box.
6. (E) Click <**Execute**>.

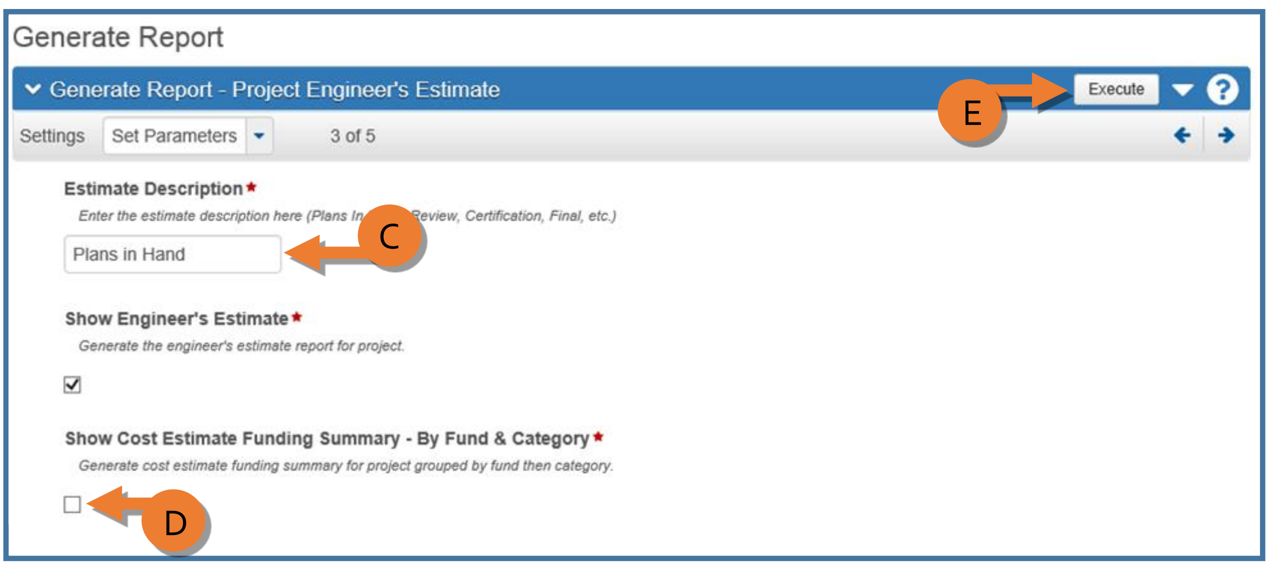


Figure 3.37

Generating the Project level Engineer's Estimate excel spreadsheet or the Estimate of Quantities excel that is formatted for CAD:

1. From the Project Overview component on the dashboard, search for and select your project. The Project Summary component will appear (*Figure 3.38*).
2. (A) Expand the Project Summary component **action menu** on the right side of the header.
3. (B) Select **Project Engineer's Estimate-XLS** or **Estimate of Quantities-CAD**.

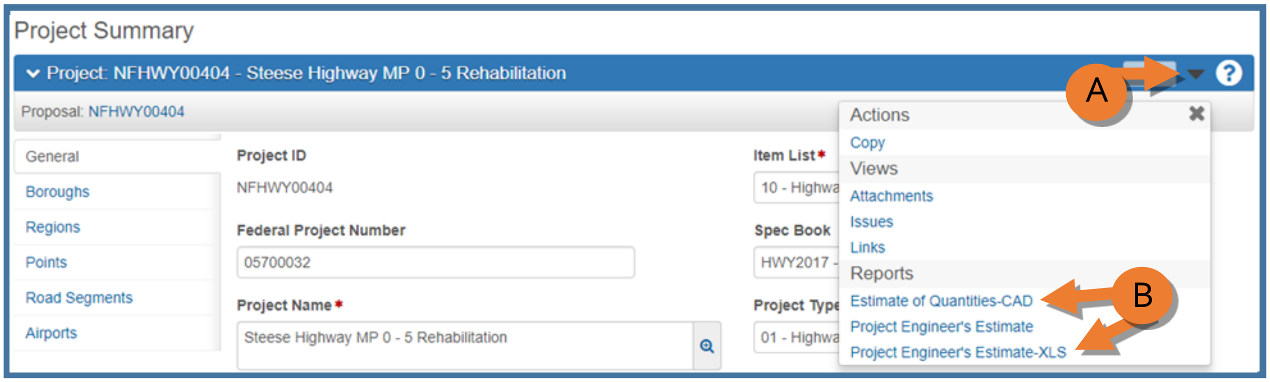


Figure 3.38

The Generate Report component will appear (*Figure 3.39*).

4. (C) Click <**Execute**>.

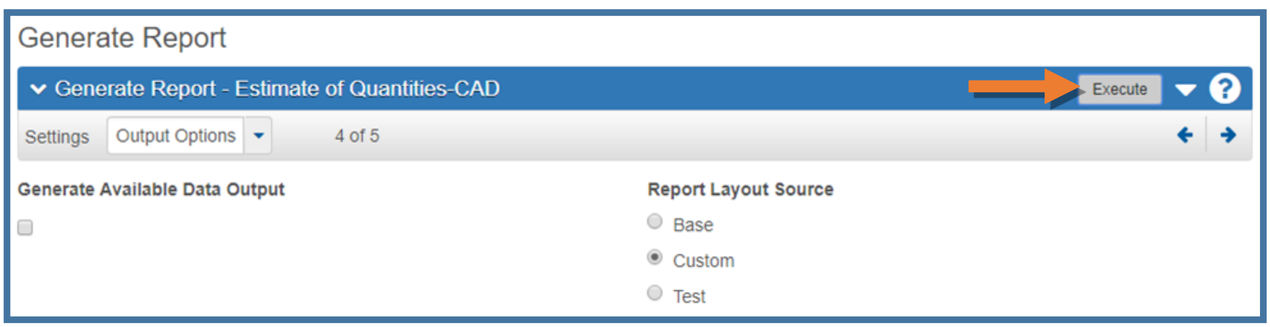


Figure 3.39

For a full list of reports, see Chapter 10.

Tab	Field	Req'd	MRS import	Description
General	Project ID	Yes	Yes	State/IRIS number assigned to the project - MRS import
	Federal Project Number	No	Yes	Federal number assgined to the project - MRS import
	Project Name	Yes	Yes	Unique name assigned to the project. MRS transfers Project Name in ALL CAPS. Modify to mixed case.
	Description of Work	No	Yes	A description of the work to be completed on the project and possibly location information as well. MRS transfers Description of Work in ALL CAPS. Modify to mixed case.
	Original Lane Miles	No	No	The number of lane miles on the project before construction.
	Post-Costruction Lane Miles	No	No	The number of lane miles on the project once construction is complete.
	Item List	Yes	No	There are three (3) lists of items in AWP. Highways which includes Facilities and MH Shoreside(?) items as these are often comined. Aviation which includes Facilities as these are often combined. AMHS includes AMHS Vessels items only. Facilites projects that are not combined with either highway or aviation can use either list.
	Spec Book	No	No	Select the specifications that will apply to the project from the dropdown.
	Project Type	No	No	Select the type or kind of project from the dropdown. May be a combo project.
	Project Work Type	No	No	The kind of work to be performed on the project.
	Location	No	Yes	Search for and select the location of or closest location to the project.
	Initial CENG% from Design	No	No	Enter the initial estimated Construction Engineering percent assigned to the project in the Design phase.
	CENG% from Construction	No	No	Enter the Construction Engineering percent assigned to calculate estimate of DOT construction administration costs.
	ICAP %	No	No	Enter the Indirect Cost Allocation Plan percent for the type of project. The system defaults to the current FHWA ICAP rate - change as needed.
	Project Item Total	N/A	N/A	The total estimated cost of all Project items. Does not include CENG or ICAP. This is a non-editable field that calculates from the items added to the project.
	Islands on Project	No	No	Enter the number of islands on a project with pedestrian crossings or incorporated curb ramps. If unsure, contact the Civil Rights Office ADA administrator.
	Curb Ramps on Project	No	No	Enter the number of curb ramps on a project.
	PF Access Points on Project	No	No	Enter the number of Public Facilities Access Points (doorways) on a project.
	ADA Comments	No	No	Enter any additional information related to the ADA aspects of the project.

	Design Manager	No	Yes	The person managing the project through the Design phase.
	Designer	No	No	Search for and select the person designing the project and creating the engineer's estimate.
	Construction Manager	No	Yes	The person managing the project through the Construction phase.
	Area Planner	No	Yes	The person managing the project through the Planning phase.
	Consultant Access	No	No	Search for and select the Consultant company assigned to design the project. Leave blank if in-house design.
	Design Staff Change Comments	No	No	If any staffing info changes for the project, please explain (who/what dates).
	Tentative Advertise Month	No	Yes	Select the month in which the project is tentatively scheduled to advertise from the dropdown. Fields open to Proposal Users only.
	Tentative Advertise Year	No	Yes	Select the year in which the project is tentatively scheduled to advertise from the dropdown. Fields open to Proposal Users only.
	Tentative Advertise Add'l Info	No	Yes	Enter any additional information about the project that is important to include with the tentative advertisement information. For CMGC projects, insert a link to the Procurement Site RFP page here.
Boroughs	Borough ID	Yes	Yes	The Borough ID will transfer from MRS, add additional boroughs if the project crosses borough boundaries or is spread across boroughs.
	Percentage	Yes	No	An approximate percentage of the project that lies within the borough. Each borough is initially assigned 100% - change as necessary.
	Primary	Yes	Yes	Check the Primary checkbox if this is the primary or only borough for the project.
Regions	Region ID	Yes	Yes	The Region ID will transfer from MRS, add additional regions if the project crosses region boundaries or is spread across multiple regions.
	Primary	Yes	Yes	Check the Primary checkbox if this is the primary or only region for the project.
	Maintenance District	No	No	Search for and select the Maintenance District in which the project lies. May not be applicable for all projects.
Points	Type	Yes	No	Select the type of location point from the dropdown. All projects must have a midpoint. Other point types are: BOP (Beginning of Project), EOP (End of Project), and Bridge.

	Latitude and Longitude	Yes	No	Enter the latitude and longitude values found when searching for th project on iTouchMap, Google Maps or similar mapping tool. Enter the latitude and longitude (as a positive value) for the point type on the project in the format DD:MM:SS/ss (i.e. 43:15:34.36).
	Description	Yes	No	Enter a brief description of the location poing. If the point type is for a Bridge, enter the Bridge # here.
Road Segments	Route ID	No	No	Enter the project's route ID from the ePID.
	Federal Route #	No	No	Enter the project's federal route # from the ePID.
	NBI #	No	No	Enter the project's NBI # from the ePID.
	NHS	No	No	Select Y or N from the dropdown indicating whether the road segment is part of the NHS system. From the ePID.
	Begin Milepoint	No	No	Enter the project's Begin Milepoint from the ePID.
	End Milepoint	No	No	Enter the project's End Milepoint from the ePID.
	Urban ID	No	No	Enter the project's Urban ID from the ePID.
Airports	Airport ID	Yes	No	If the project has an airport, search for and select the appropriate airport. Add additional records if multiple airports are included in the project.

Project Item Data Fields

Tab	Field	Req'd	Description
Items	Item ID	Yes	Search for and select an item to add to the engineer's estimate. If you need an item that is not on the list, contact your Module Administrator to add it.
	Bid Schedule Supplemental Description	Maybe	Enter a Bid Schedule Supplemental Description if the item is generic and requires one or you need to add one. Always add a Bid Schedule Supplemental Description if you have multiples of the same item on your EE that need to stay separate for bidding. Items cannot roll up if they have a Bid Schedule Supplemental Description.
	Roll Up Supplemental Description	No	Enter a Roll Up Supplemental Description for multiples of the same item that will roll up into one item on the bid schedule. This supplemental description will not appear on the bid schedule. If you need a Bid Schedule Supplemental Description for your rolled up item, add that to the Proposal Item once the project has been added to a proposal. This field must be used in conjuction with the Combine With Like Items field.
	Combine with Like Items	No	Check this box to roll up the item will items having the exact same item ID. If this box is checked, the item must also have a Roll Up Supp Descr.
	Supplemental Description Required	No	Indicates whether a Bid Schedule Supplemental Description is required for the item. An example of an item that requires a Bid Schedule Supp Descr is 602.0003.0000 Structural Plate Arch, ____ Span, _____Rise, _____ Gauge.
	Unit of Measure	Yes	Auto filled based on Item ID selected.
	Quantity	Yes	Enter the estimated quantity. Lump Sum item quantity always = 1.0. Contingent Sum amounts are entered as quantity. For $0 Contingent Sum items, enter a quantity of 0.001 - this will appear as $0 on the Bid Schedule.
	Project Item Unit Price	Yes	Enter the estimated unit price. Contingent Sum items always have a unit price of $1.00.
	Extended Amount	Yes	Automatically calculated based on Quantity x Project Item Unit Price.
	Category ID	Yes	Select the applicable Category ID to assign the item to.
	Proposal Item Line Number	N/A	Auto filled when the project is added to a proposal.
	Comments	No	Enter any comments related to this item as necessary.
	Alternate Quantity	No	Enter an estimated quantity used to arrive at a lump sum amount. Not necssary for all lump sum items.
	Alternate Unit Price	No	Enter an estimated unit price used to arrive at a lump sum amount. Not necessary for all lump sum items.
	Alternate Unit of Measure	No	Select the type of measurement used to arrive at a lump sum amount. Not necessary for all lump sum items.
	Last Updated By	System Generated	The username of the person who most recently changed this record. This field is automatically populated by the system.
	Last Updated Date	System Generated	The date and time this record was most recently changed. This field is automatically populated by the system.