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# Welcome

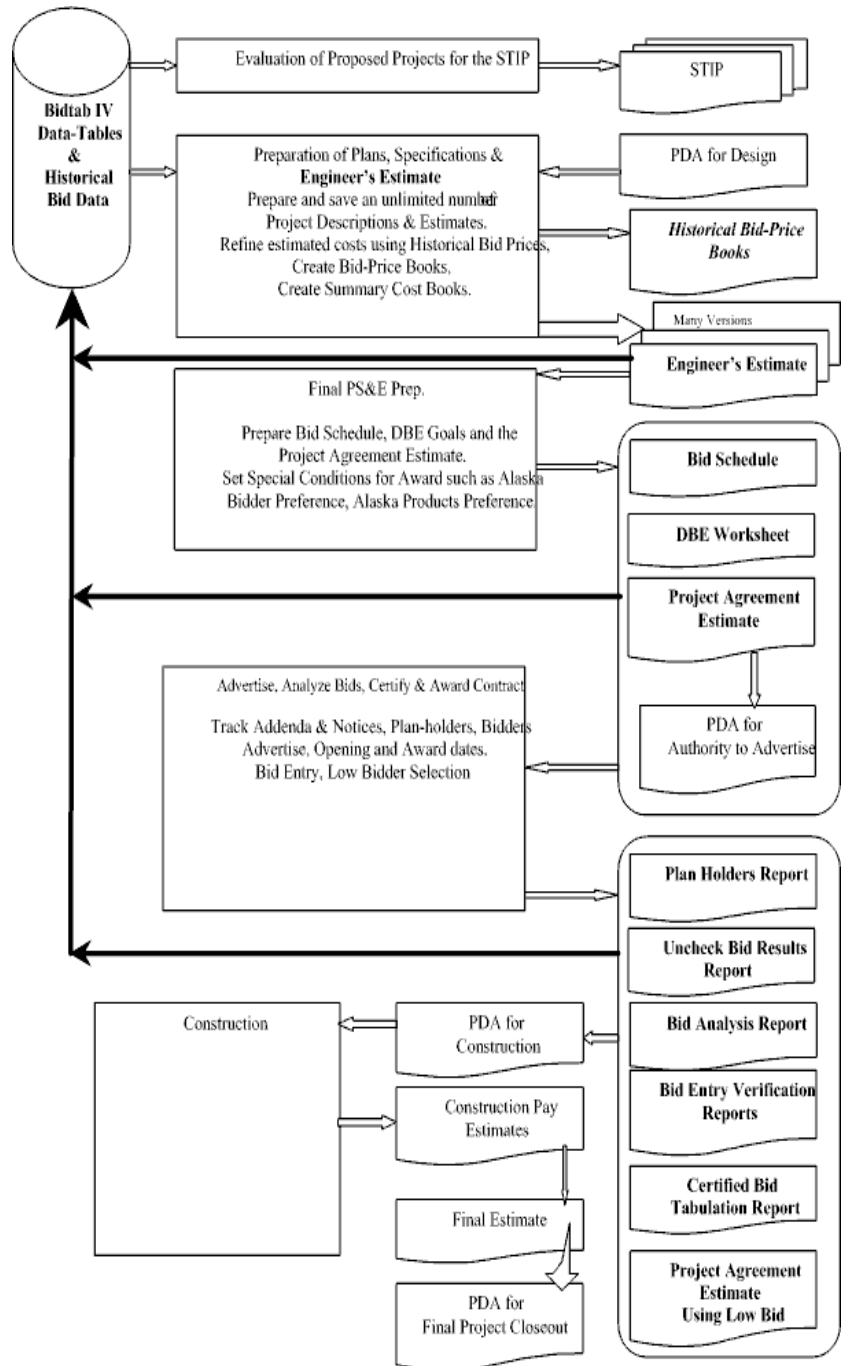
## What is Bidtab IV?

Bidtab IV represents the latest generation of ongoing efforts by the Alaska Department of Transportation and Public Facilities to create a computer program and database that will help increase the accuracy of their capital improvement project estimates. *The primary focus of Bidtab IV is to store and retrieve bid tabulations.* These historical bid tabs are frequently used to:

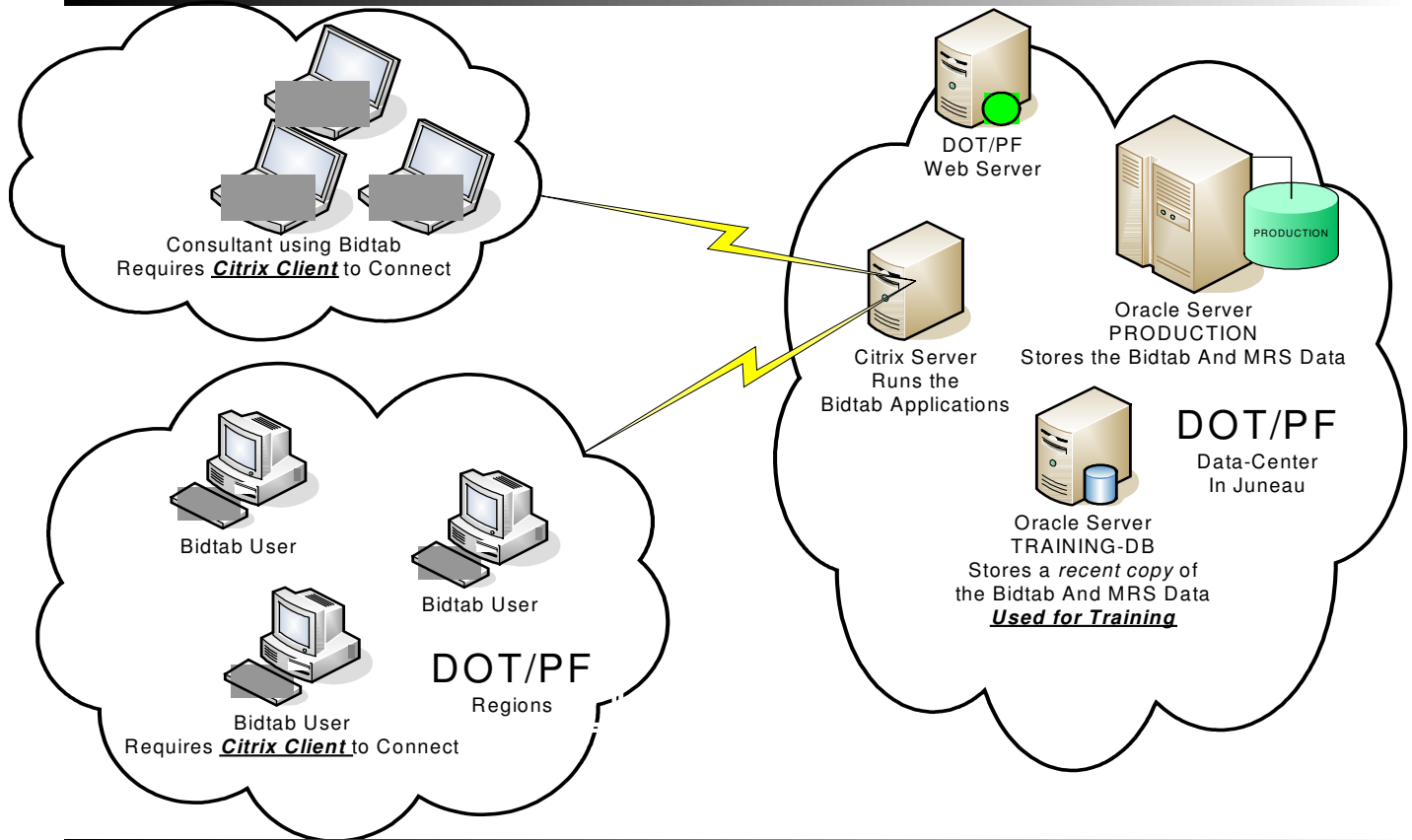
- ◆ evaluate the cost of new capital improvements,
- ◆ program funding,
- ◆ prepare new construction estimates,
- ◆ advertise and award projects,
- ◆ prepare change orders and pay estimates to contractors and
- ◆ Closeout projects.

Earlier efforts by the Department included a dBASE program developed by the Northern Region in the 1980's and a Microsoft Access program developed in the Southeast Region in the late 1990's. Each program had its strengths and taken as all whole would have provided a fairly extensive database for use by the Department.

Bidtab IV draws upon the features of these earlier efforts to provide a comprehensive system for estimating the cost of new capital improvements using historical bid tabulations. In addition, it provides the means to develop a series of supplemental reports that are based upon the Engineer's Estimate. The Figure on the right illustrates the processes, data flow and documents that may be created using Bidtab IV. Bidtab IV can be used to produce the documents indicated with **bold type**.



## Bidtab Deployment



- ◆ There is only one copy of the Bidtab IV program. It is installed on a Citrix Server at the DOT/PF data center in Juneau. The Citrix server is a very powerful machine with multiple processors, large banks of memory and extremely fast network connections to the Database Servers. The Citrix Server is configured to run many different instances of the Bidtab program at the same time. This allows numerous users to concurrently run the program.
- ◆ Users access Bidtab IV using a Citrix Web client. The Client is used to transmit the display, keyboard, and mouse data between the user's computer and the Citrix Server.
- ◆ To obtain the Client software, you need to contact the person in your region who has been designated to allow access to the Bidtab Program. This person will secure a Citrix Username and Password for you to use and will provide directions on how to install the client software and access the program.
- ◆ Installation of the client software is very simple task and typically takes less than five minutes. Currently, all users are required to use either Windows 2000 Professional© or Windows XP Professional© operating systems on their computers to connect to the application server.

## ***Bidtab IV Interface***

Bidtab IV uses the familiar Microsoft Windows interface. Features worthy of note include:

- ***Context sensitive help is available on any form by pressing the F-1 key*** on your keyboard. You may also select Help from the Main Menu.
- Bidtab IV provides a *multiple document interface*. This is similar to Microsoft Word or Microsoft Excel that allow you to open several documents or spreadsheets at the same time. Bidtab IV allows you to open many forms at the same time.
- Bidtab IV uses color-coded text boxes to indicate fields where Items can be selected from a popup dialog Form. Simply clicking on the color-coded text box to display the form.
- Bidtab IV makes extensive use of data grids:
  - Many of these grids have special functions available through a popup menu. *To access the popup menu, Right click on the grid.*
  - Many of these grids allow you to select multiple items to perform functions upon. To select multiple items, Left Click on the first item and while holding Left mouse button down, drag the mouse down to the last item you want to select. All of the selected items will be highlighted. Release the Left mouse button and Right click in the highlighted area to display the popup menu and select the function you wish to perform.
  - The font-size for all grids is adjustable. Simply click *Select Grid Font* from the Main Menu on any form. This feature allows the use of Bidtab over a wide range of screen formats and user-preferences.
- Bidtab IV includes many Functions that are integrated with the desktop on your computer. This allows copying information to spreadsheets or documents on your personal machine.

## ***What you should learn in this module***

This module discusses Bidtab IV Users, Work groups, forms that are available and the storage features that are used to secure Your Work.

You should learn how to become a user of Bidtab IV, how to join a Workgroup, how to extend your capabilities through expanded access to Bidtab IV Forms and Special Permissions and how your work is Secured through the use of cabinets.

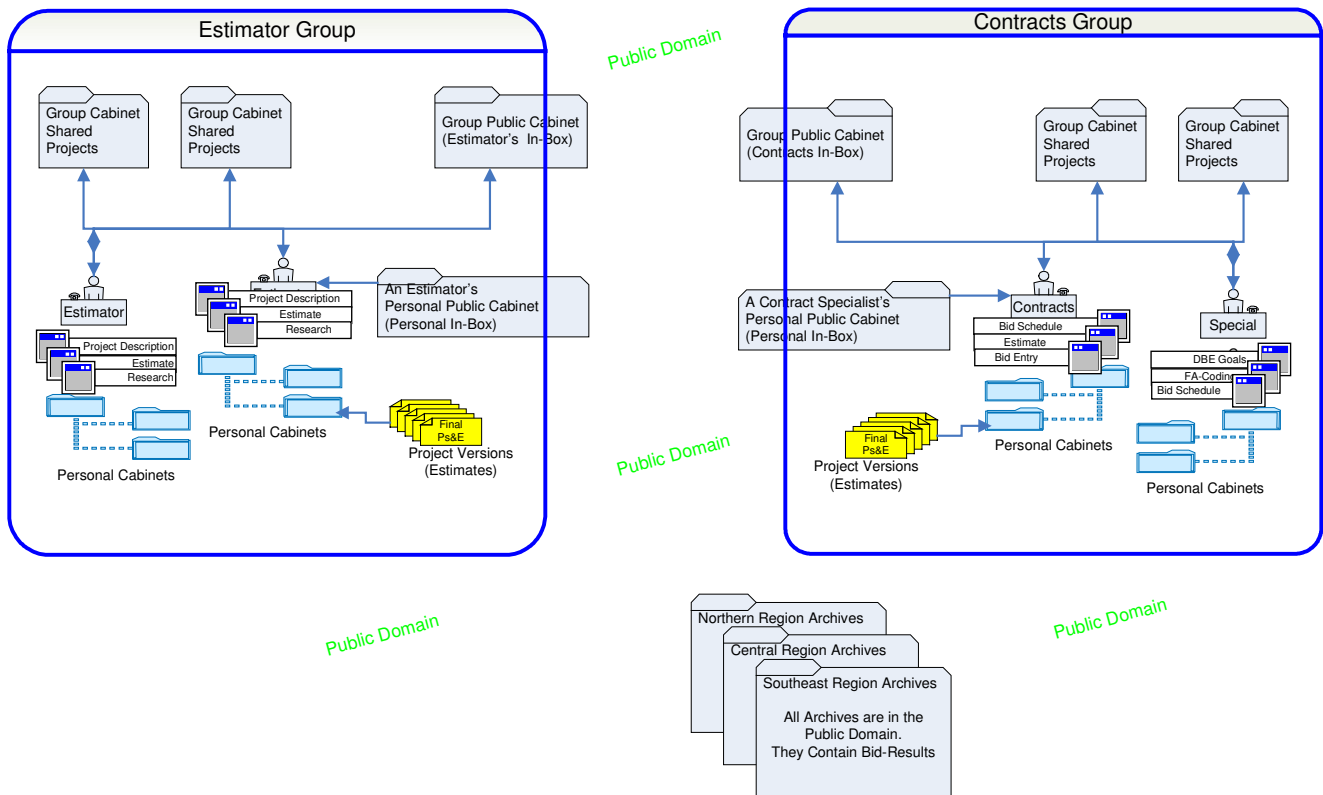
You should also learn what a Cabinet is, the types of cabinets that are available, how your Work is secured in Cabinets, how to share your work with a work group and how to manage Your Cabinets and Projects.

# Bidtab IV Users and Workgroups

## Securing Your Work

Bidtab IV provides a security system that employs individual Users, Form Authorizations, Workgroups, Special Permissions and Secured Archive Cabinets to prevent unauthorized modification to a user's ongoing work. The system is designed for multiple Regions and multiple Work Groups within each region.

Depicted below is a one possibility for a regional configuration  
*The features shown will be discussed in the remainder of this document.*



## Bidtab IV Forms

You probably do not need the complete functionality of the Bidtab IV software to

Project Description
Estimate
Research
FA-Coding
DBE Goals
Bid Schedule
Bid Entry
Conformance
Perspectives
Authorize Users

perform your official duties. The program provides a means for *a person with Authorization privileges* to designate the forms you are authorized to use. Bidtab IV has the following Forms:

- **Prepare Estimates and Research historical Bid Prices:**
  - *Project Description Form*: used to describe projects, only users who have access to the *Estimate Form* can use this form.
  - *Engineer's Estimate Form*: create or modify estimates.
  - *Research Historical Bid Prices Form*: research historical bid prices.
- **Specialty Work sheets:**
  - *DBE Goals Worksheet Form*: prepare DBE goals.
  - *Federal Aid Coding*: prepare Project Agreement Estimates and Coding backup.
- **Contracts Forms:**
  - *Bid Schedule Form*: Create a bid schedule, set allowances for Alaska Bidders and Products.
  - *Bid Entry and Certification*: Interface with the Department's Management Reporting System, enter bids and Store the Project in an Archive.
- **Maintenance Forms:**
  - *Maintain: Conformed Pay Items*: associate unassigned pay-items to Standard Items. You will need a thorough knowledge and understanding of all Standard Specifications and Pay-Items used over the years for at least one particular Mode to successfully use this form.
  - *Maintain: Perspectives*: Cross-reference similar Standard Items to create "Perspectives". You should have a thorough knowledge and understanding of all Standard Specifications and Pay-Items used over the years for at least one particular Mode before attempting to use this form.
  - *Maintain: Authorize Users*: This is the form you will use to authorize users.

## Special Permissions

In addition to selecting which forms you can access, Bidtab IV allows *a person with Authorization privileges* to grant you Special Permissions:

- ◆ *Contract Training*: Allows for Creation and Deletion of Demonstration Contracts in MRS. Used for Training Only!
- *Global Access*: Allows you access to your authorized forms for projects in all Regions and all Workgroups. This may be an appropriate permission for a highly specialized function performed at the departmental organization level.

- *Restricted Access:* When a New User is first created, they have Restricted Access. They are allowed to create New Cabinets and Projects, and are authorized to use the Project Description, Estimate and Research Historical Bid Prices Forms. They are not authorized to access projects they have not created.
- *Maintain Master List.* Allows you to modify the Federal Aid Improvement Codes on the Federal Aid Form.
- *Can Archive.* Allows you to insert, delete or modify a project in a Cabinet called an Archive. (Cabinets are discussed in the next section). This is a very powerful permission because with this permission you can actually change the data stored for a project that has been certified and awarded.
- *Change System.* This allows you to add, delete or modify the Regions, Districts, Modes, Types and Facility records in the database.
- *SysOperator.* This Authorizes a User all Forms and Functions on all projects except the *Change System* permission. It is used for maintenance of the database.

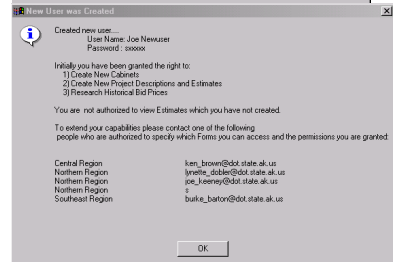
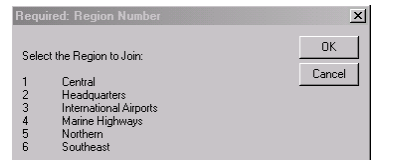
### New Users and Registration



You are required to register to use the Bidtab program.

This registration process is simple.

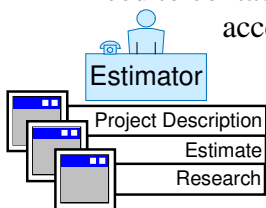
1. Provide a unique User name and password and then click the *New User Button*. It is suggested, but not required, that you use your *email name* because this is a unique identity in the departments mail system. **Write down and save your user name and password because without it, you will be unable to access your projects.**
2. You will then be asked to join a region. A User can only belong to one region.
3. And finally, you will be asked to provide your actual e-mail address.



When the registration process is complete, you will be informed that you have *Restricted Access and who can extend your capabilities*.

It's a good idea to write down the e-mail address of the person in your region who is authorized to extend your capabilities. You will need to contact this person if you wish to join a Workgroup or have access to other forms and functions which available in the

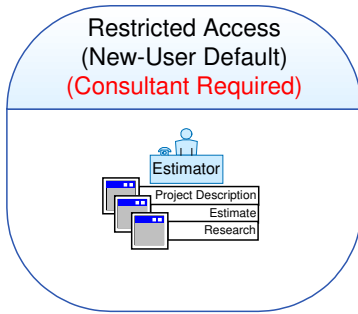
Bidtab IV program.



New users are initially granted access to the Project Description, Estimate and Research Forms.



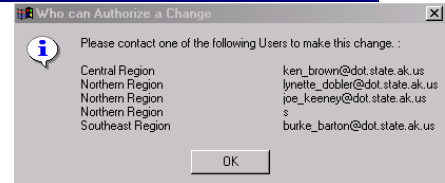
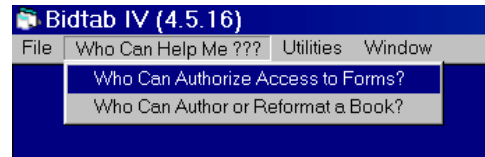
## Extending Your Capabilities



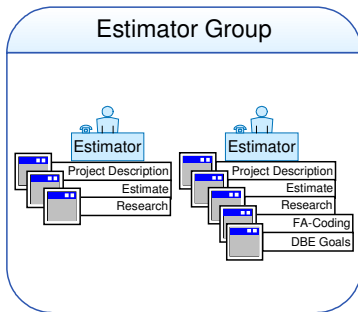
When a *New User* is created they have *Restricted Access*. This means that they cannot "see" other people's Estimates.

**Restricted Access is required for all user's outside the department because Engineer's Estimates are confidential until the bids have been opened.**

To extend your capabilities you must contact a user who has the capability to authorize additional functions. . To find out who these individuals are, close all active Bidtab IV Forms and Click on the Main Menu selection "Who Can Authorize Access To Forms?"



## Workgroups

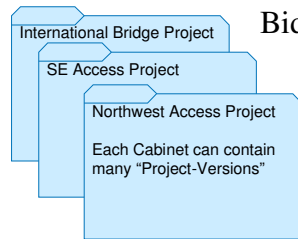


Workgroups are employed in Bidtab IV to allow User's to share projects. A User can only be a member of one Workgroup. A typical Workgroup may be a group of designers who share the development of projects or a team of contracts folks who share the work involved in advertising, bid entry and award of a project.

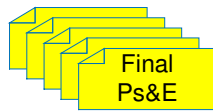
Workgroups do not restrict in any way the functions a member of the Workgroup can perform. Each member can be independently authorized to use any of the *forms available* in Bidtab IV and may be granted any of the *Special Permissions*. For example, a Workgroup of estimators may have only one individual who is experienced in preparing a final Project Agreement Estimate and the Coding backup. Only this individual need be granted access to that particular form.

**To join a Workgroup, you must contact a user who is authorized to extend your capabilities.** (See above: "Extending Your Capabilities")

# Cabinets & Project-Versions



Bidtab IV provides a filing system that uses "*Cabinets*" to store "*Project-Versions*". Cabinets allow you to organize your work in much the same way you use filing cabinets in your office to separate your projects or like Microsoft's Windows uses folders to logically organize your files. In all cases, it's up to you to provide the organization and logic for your filing system.



Project Versions  
(Estimates)

As Projects proceed through development, their descriptions and estimates change. A typical series of estimates might include a Preliminary estimate, Review PS&E estimate, and the Final PS&E estimate. Each of these estimates and descriptions are referred too as a distinct "*Project-Version*".

If a project proceeds to "advertising", one of these Project-Versions is used as the foundation for additional work involving DBE goals, Project Agreement Estimates, Federal Aid Coding Backups, Bid Schedules, distribution of contract documents, analysis of bids and contract award.

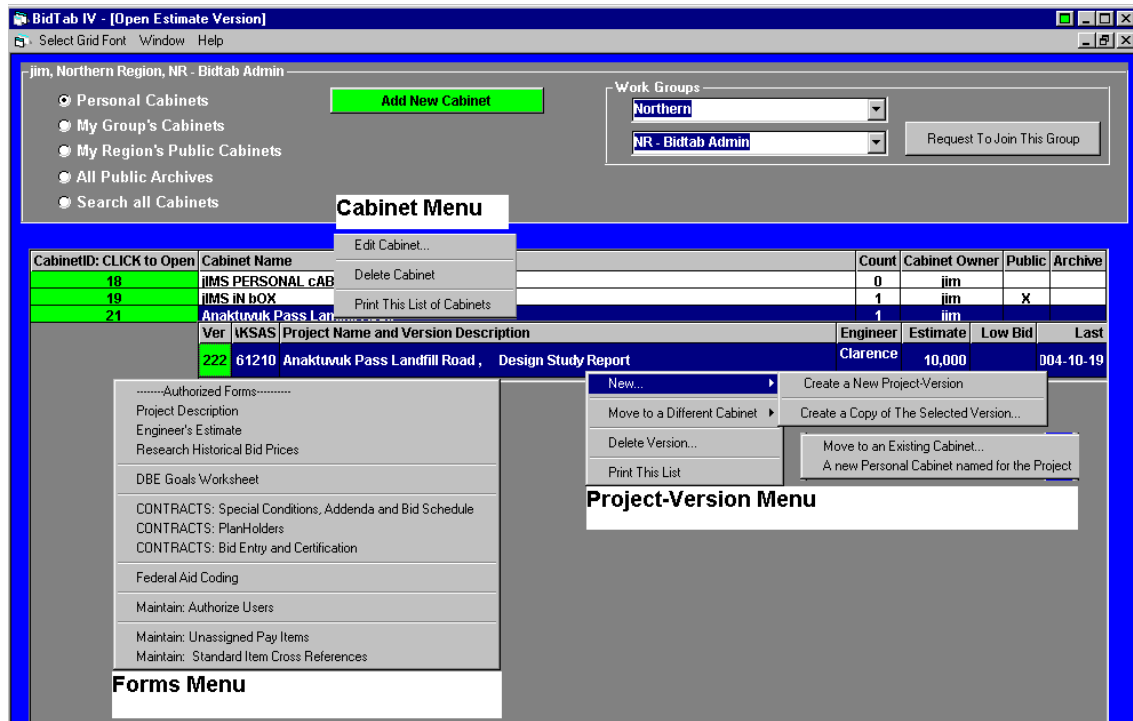
Cabinets are initially created by Users but may be "owned" by either a User or a Workgroup. Only the "Owner" of a Cabinet can modify its contents.

An Estimator will probably create a Cabinet for each of their projects to store all of the estimate versions that they develop during the design-life of the project. On the other hand, a Cabinet may be created by a Workgroup to allow group access to a series of project-versions or to receive Project-Versions from other Workgroups.

## **Cabinet Rules**

- Only a Cabinet "Owner", be that an individual User or a member of a Workgroup, is authorized to modify the Cabinet attributes or its contents.
- An unrestricted User can only access Personal Cabinets, Cabinets in their Workgroup, Public Cabinets in their region and Archive Cabinets from all the Regions. They may copy the contents from any of the Cabinets.

## The Cabinets Form



This is the Cabinets Form with all of its popup menus exposed. Normally it does not look this cluttered. The following sections explain the major features of this form:

### Cabinet Type Selection

The Option buttons in the top pane allow you to select a *Cabinet Type* or to locate a project anywhere in the database by selecting *Search All Cabinets*. Search options allow you to search by Project Name, AKSAS Number, Engineer's Name, and Project Location or by Project-Version Identification Number.

### Workgroup Requests

The Workgroups pane has pull-down selections of the Regions and Workgroups that have already been established. You can find out how to join a particular Workgroup by clicking on the command button. This will simply bring up a dialog form that informs you whom to contact to be placed into a particular group.

### Cabinet Selection and Menu

A Cabinet is *selected* by clicking on the Number highlighted in green in the *CabinetID* column. This will display the list of Project Versions contained in that Cabinet. If your access has been restricted, the Cabinet will not open.

The Cabinet popup menu is displayed by Right-clicking on a Cabinet. If you do not own the Cabinet then the *Edit and Delete* Cabinet Selections are disabled.

## ***Project-Version Selection and Menu***

A Project-Version is *selected* by clicking on the Number highlighted in green in the *Ver* column. This will display the *Forms Menu*.

Right-click to display the Project-Version Menu. If you do not own the Cabinet then only the menu item *Create a Copy of the Selected Version* is enabled.

## ***Managing Your Cabinets***

### **Creating a Cabinet**



To add a new Cabinet click on the *Add New Cabinet Button* located in the top pane. A dialog form will be displayed where you can provide a name for the Cabinet and select several attributes for the new cabinet.



### ***Cabinet Attributes***

In addition to the Name and Owner of the Cabinet, three attributes are used to define its scope:

#### ***Make Group Cabinet: Share with Group***

Selection of this attribute changes the Owner of the Cabinet from you to the your Workgroup. Obviously, if you do not belong to a Workgroup, this selection is not available. If you make this selection then the Cabinet belongs to everyone in the group and any Project-versions contained in the group cabinet can be modified by anyone in the workgroup. In addition, since everyone in the group "owns" the cabinet they can change any of the Cabinet Attributes (including whether it is shared with the group). This is a fast and efficient way to transfer a cabinet full of projects to someone else in your workgroup.

#### ***In-box: Public Cabinet***

Selection of this attribute exposes the Cabinet to the Public Domain. Since only a User or Workgroup can own a Cabinet, a Public Cabinet is like an "In-box" for its owner.

#### ***Archive***

This attribute is only available to Users having the *Archive Permission*. Projects in an archive are read-only. A User may copy a project-version from an Archive

but must select a Non-Archive Cabinet for the destination. This restriction does not apply to an Archivist.

### Cabinet Types

Using the Cabinet Attributes allows for the following types of cabinets:

#### Personal Cabinets

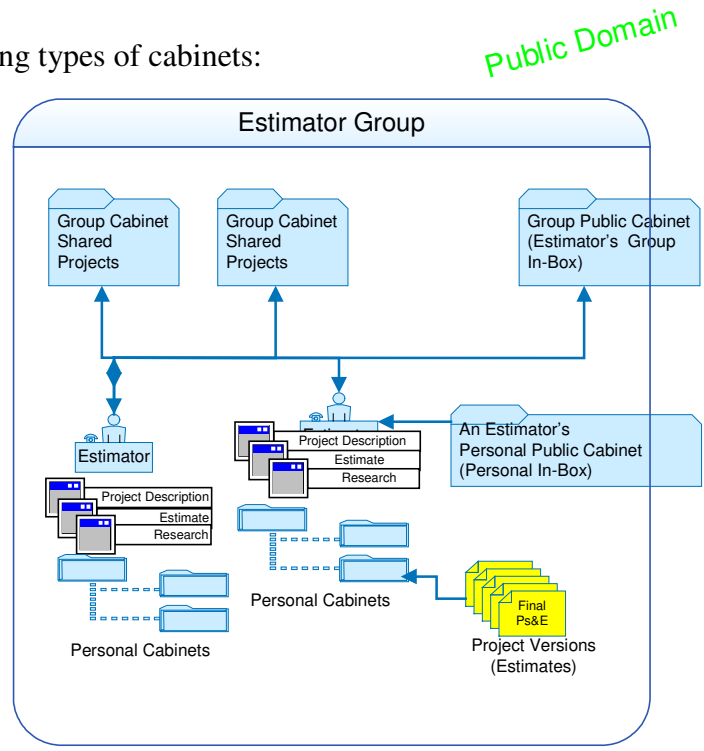
(The Default) with no selections made.

#### Group Cabinets

Share with Group is selected.

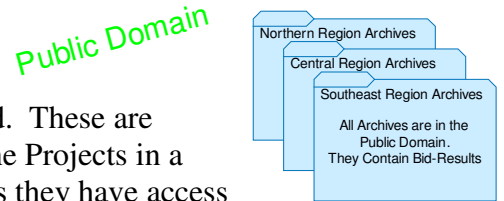
#### Public Cabinets

Created for either a User or a Group, when *Public Cabinet* is selected. These act as a kind of transparent in-box because everyone in the Region can transfer projects into the cabinet. Once in there, only the "owner" can remove or modify the contents but any unrestricted User in the Region can copy the contents.



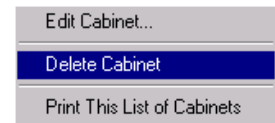
#### Public Archive Cabinets

Created when both *Public Cabinet* and *Archive* are selected. These are primarily used to store projects that have received bids. The Projects in a Public-Archives are read-only. A User may open the forms they have access to but they are not allowed to edit anything. Any unrestricted user can copy a project from a Public Archive.



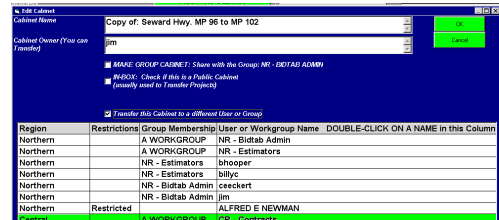
### Change Owners, Delete or Modify a Cabinet

To modify Cabinet, Right click on the Cabinet Name to display the Cabinet Menu.



Note: *Bidtab IV will not allow you To Delete a Cabinet that contains projects.*

If you select Edit Cabinet from the Menu, the same dialog form you used to create the Cabinet will be displayed. You can transfer the Cabinet to a new owner or change any of the Cabinets Attributes.



## Managing Your Projects

The screenshot displays the Bidtab IV software interface. At the top, there is a table with columns: CabinetID: CLICK to Open, Cabinet Name, Count, Cabinet Owner, Public, and Archive. The first three rows are highlighted in green. Below this table is another table with columns: Ver, KSAS, Project Name and Version Description, Engineer, Estimate, Low Bid, and Last. The row with Ver '222' is highlighted in green. Two context menus are overlaid on the interface. The 'Forms Menu' is open over the highlighted row, listing various forms like 'Project Description', 'Engineer's Estimate', and 'DBE Goals Worksheet'. The 'Project-Version Menu' is open over the '222' cell, listing options like 'New...', 'Move to a Different Cabinet', 'Delete Version...', and 'Print This List'.

CabinetID: CLICK to Open	Cabinet Name	Count	Cabinet Owner	Public	Archive
18	JIMS PERSONAL CAB	0	jim		
19	JIMS IN BOX	1	jim	X	
21	Anaktuvuk Pass Landfill	1	jim		

Ver	KSAS	Project Name and Version Description	Engineer	Estimate	Low Bid	Last
222	61210	Anaktuvuk Pass Landfill Road , Design Study Report	Clarence	10,000		004-10-19

### Open a Form

Select a Project Version by left-clicking on the **Number highlighted in green** in the *Ver ID* column. In this example, I clicked on the Number 222. This displayed the *Forms Menu* where you can select which Form to open. Only the forms you are authorized to use will be presented in the menu.

If you or your workgroup do not own the Cabinet the project is located in then the top line in the menu will say **Read Only**. This means that you can look at the contents of the forms, but you will not be able to modify them.

### Project-Version Menu Functions

Right-click to display the *Project-Version Menu*. If you do not own the Cabinet that the project is located in then only the menu item *Create a Copy of the Selected Version* will be enabled. Then you may select from the following choices:

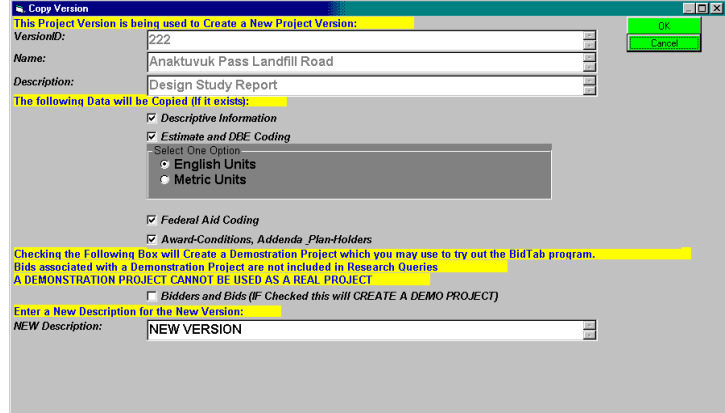
#### ***New...Create a New Project Version***

This menu selection will create a New Project in the Cabinet. You will have to use the Project Description and Estimate Forms to supply the details.

**New...Create a Copy of the Selected Version (cloning)**

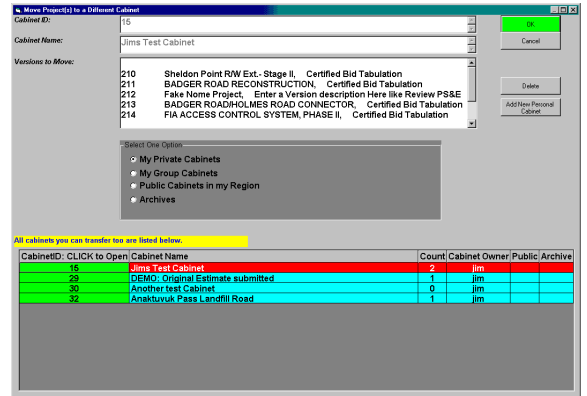
This menu selection will open a dialog form where you can specify exactly what information you want to copy to a new Project.

*Please note that if you select Bidders and bids you will create a demonstration project. Demonstration projects can be used to try out Bidtab IV's many features. A demonstration project cannot be used as a real Project.*



**Move to a Different Cabinet....(an Existing cabinet)**

You can move a single project or a series of projects to a different Cabinet. To do this, first select the projects from the list, using the left mouse button. Right click in the Selection to display the menu. If you select move to an Existing Cabinet, a dialog form will open from which you can select the Target Cabinet.



**Move to a Different Cabinet....(A Personal Cabinet named for the Project)**

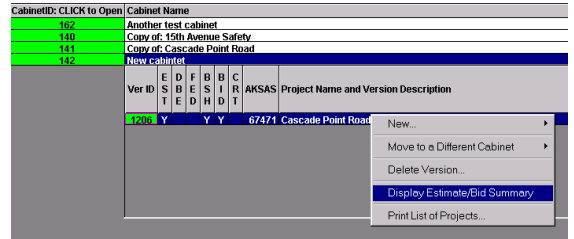
You can move a single project or series of projects to New Cabinets individually named for each project by selecting this option. Bidtab IV will automatically create the Personal Cabinets for you. To do this, first select the projects from the list. Right click in the Selection to display the menu and then, of course, select *Move To A Different Cabinet... A Personal Cabinet Named for The Project.*

**Delete Version**

You can delete a single Project or a series of projects using this menu selection.

### Display Estimate/Bid Summary

This function allows you to display the Estimate and the Bid analysis for a project.



If you would like a hard-copy of the analysis, with the Estimate/Bid summary displayed, right click on the grid and select *Print this Worksheet* .

Select *Close Worksheet* to return to the list of Estimate Versions.

CabinetID: CLICK to Open	(ADV. EDITING) Sec/Chapter	Pay Items for: 15th Avenue Safety Opened: 3/1/1990	Quantity & Unit	Unit Price & Estimated Amount	The Lowest Bidder BUDGET ROOFING	Second Lowest Bidder NORTHMIND ARCHITECTS	Third I ARTH ENGIN ASSO
162							
140							
141							
142							
	Basic Bid Ch 40	401 (5) Asphalt Price Adjustment	1 Contingent Sum	6,970.00 6,970.00	6,970.00 0%	6,970.00 0%	
	Basic Bid Ch 40	407 (1) Stone Mastic Asphalt Concrete	3,370 Megagram	37.00 124,690.	0.00	0.00	0.00 -100%
	Basic Bid Ch 40	407 (2) Asphalt Cement, Grade PG 58-28	219 Megagram	365. 79,935.			0.00 -100%
	Basic Bid Ch 40	407 (4) Asphalt Price Adjustment	1 Contingent Sum	9,560. 9,560.			9,560.00 9,560.00 0%