



COLORADO
Department of
Transportation

AASHTOWARE PROJECT PRECONSTRUCTION COMBO PROJECT USER GUIDE

Version 1.0

Engineering Applications

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Table of Contents

1.0	Introduction to Combo Projects	3
2.0	Accessories Transfer	4
3.0	Projects.....	6
3.1	Bid Projects Summary	6
3.2	Lat/Long.....	6
3.3	Bridge Segments	6
4.0	Categories and Items Link	7
4.1	Categories	7
4.2	Items.....	7
5.0	Fund Packet Overview	8
5.1	Assigning Item Funding.....	8
6.0	Non-Bid Projects.....	9
7.0	Prime Projects	10
8.0	Proposals	11
8.1	General Tab.....	11
8.2	Sections and Items Link.....	14
8.3	Printing Reports	15
8.3.1	Proposal Price Schedule Report.....	15
8.3.2	Notice to Contractors Report	16

Combo Projects



The Combo Project approach allows for associating multiple projects under one contract with one prime project and one proposal



This guide will detail the steps for creating the desired hierarchy and relationships for a Combo Project - the system sets up all the components and relationships in the very first step.



1.0 Introduction to Combo Projects

Several projects may now be combined under one Contract/Proposal in the AASHTOWare Project modules. This Combo project approach allows for associating multiple projects under one contract with one prime project and one proposal for more efficient management both in our software system and in the field.

Each project must begin in SAP as a separate project with a unique five-digit project code and associated funding. There will be separate purchase orders and Form 65s for each individual project as well. Regarding Preconstruction and SiteManager, there will only be one set of specs, one SAQ, one proposal schedule for bidding purposes, and one contract awarded.

The same basic functionality of transferring projects from Trns*port Accessories into Preconstruction will remain with an added option of selecting a Prime Project and any partner projects to combine with it for transfer into Preconstruction.

This guide will detail the steps for creating the desired hierarchy and relationships for a Combo Project - the system sets up all the components and relationships in the very first step.

Each project must be released from SAP into Preconstruction Accessories and joined as a Combo in the initial Transfer from Accessories into Preconstruction. This process allows for continuity and data integrity from beginning (Proposal) to end (Construction). If combining a Bridge Enterprise (BE) project, the BE project will need to be selected as the prime project and the system will create the proposal. When naming the prime project the following convention will be used: XXXXX – Combo.

Accessories Transfer

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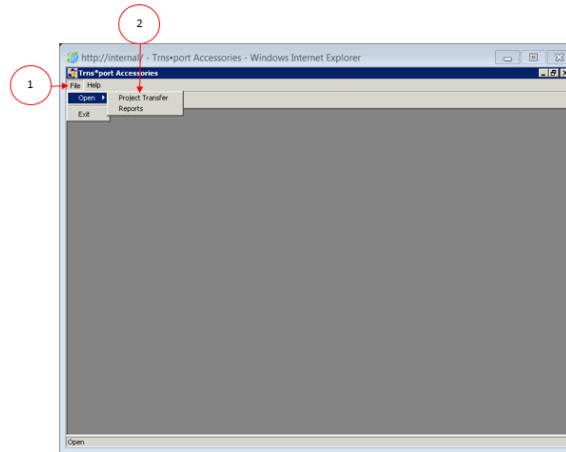
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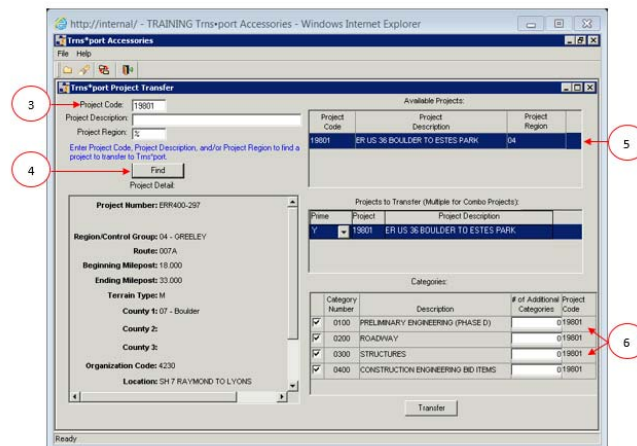
2.0 Accessories Transfer

Go to Trns•port Accessories at <http://internal/trnsapps> to transfer your project from Trns•port Accessories into Preconstruction - creating the Bid, Non-Bid, Prime, and Proposal & Bid Letting components.

1. Select **File**.
2. **Open Project Transfer**.



3. Enter your five (5) digit **Project Code** or two (2) digit **Project Region Code** (e.g., 01, 02, etc.).
4. Click the **Find** button.
5. Highlight the desired project in the **Available Projects** list.
 - Double click to select for **Transfer**.
6. Check each box for each **Category Number** and add any number of **Additional Categories** needed.



Accessories Transfer



After entering the first project, perform the following steps:

- Go back to enter the second Project Code for the partner project.
- Click the **Find** button.
- Highlight the project in the Available Projects list.
- Double click to select for Transfer.
- Check each box for each Category Number and add any number of needed Additional Categories.
- Remember to select all Bid and Non-Bid Categories associated with your project.
- Set Prime Project Indicator to Y on the desired project number.
- Select the Transfer button.
- Select OK to confirm.



- Remember to select all **Bid** and **Non-Bid** Categories associated with your project.
7. After entering the first project, go back to enter the second Project Code for the partner project.
 8. Click the **Find** button.
 9. Highlight the project in the **Available Projects** list.
 10. Double-click to select for **Transfer**.
 11. Check each box for each **Category Number** and add any number of needed **Additional Categories**.
 12. Remember to select all **Bid and Non-Bid Categories** associated with your project.
 13. Set Prime Project Indicator to **Y** on the desired project number.
 14. Select the **Transfer** button.
 15. Select **OK** to confirm.

Workflow



Workflow should auto populate and will show as Project & Proposal Creation & Estimation when first created.



Bridge Structure



Each Structure Category must each have its own Bridge Segments record, including:

- Bridge ID
- Length
- Width
- Number of Spans
- Bridge Type

If a separate Category is created for a Wall, do not list it as Bridge Type 30 (Misc.) but rather as Bridge Type None.

For consistent historical data, only Bridges and Walls require separate Structure Categories and corresponding Bridge Segment records in Preconstruction.



3.0 Projects

- Remember to complete all Bid & Non-Bid project mandatory fields in order to generate a Preliminary Prime Project Detail Estimate.
- Remember to **Save** changes before navigating to the next tab or link.
- Always **Validate Project** after adding, changing, or deleting items.

3.1 Bid Projects Summary

Not all information will populate with the transfer from Accessories. You must verify that the information in the following tabs is correct and add any necessary information:

- Verify xxxxx-Bid that matches the proposal is checked as **Controlling Project**.
- Enter Construction Eng. Pct. for P or NP Project.
- Verify Preconstruction Resident Engineer.
- Verify **Project Work Type** and **Project Type: Project Work Type in Projects** must match Contract Work Type in Proposal and both must be populated before entering items.
- Add the **Description**.
- Counties should auto populate from SAP/Accessories.
- Confirm that the **Primary County** matches the **Proposal Primary County** and ensure that the total of all counties equals 100%.
- Regions should auto populate.

3.2 Lat/Long

The Cost Estimating Department will enter the Latitude and Longitude during the time of estimating.

3.3 Bridge Segments

- Enter the **Bridge ID**.
- Be sure to assign the **Category ID** individually (i.e.: 0300, 0301, and 0302).
- Enter the **Description**.
- The **Length** populates on **Preliminary Detail Estimate** as **Total Bridge Length** in Feet.

Reminder

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- Categories are intended to identify individual Roadways, Structures (Bridges & Walls only), or Funding Sources – not specific types of work.
- Consistency in names of Category, Fund Package, and Fund Package Description ensures accuracy of calculations on the Preliminary Detail Estimate, Form 1180, and Form 65.
- These reports rely on the standard 0200, 0300, 0400 etc. in the Category, Fund Package, and Fund Package Description fields.

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Items For Review

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- Supplemental description for any F/A Items.
- Non-Bid check box - for all F/A Items and all Items in Non-Bid Project.
- Check Major Item box if extended amount equals \$15,000 or more.
- Each Bid Project may have its own mobilization and Force Account Items.

4.0 Categories and Items Link

4.1 Categories

- The **Category Description** (Roadway, CE, etc.) should auto populate.
- The **Category Work Class** (0200-Roadway 0300-Structures, etc.) should auto populate.
- Add **Construction Engineering Percent** for each **Category**. Current rates are 10 for NP & 20.02 for P.
- Be sure to check the **Combine with Like Categories** checkbox.
- **Federal Construction Class** should be B-Biddable Items in Bid Project and N – Non-Biddable in Non-Bid.
- To add a new **Category** select **New**.
- To **Delete**, go to **Actions**. Complete all fields as above.

4.2 Items

1. Click **New**.
2. Enter the **Item ID** (xxx-xxxxx).
 - Add the **Project Item Supplemental Description** for all **3rd Party F/A Items**.
3. Enter the **Category ID** (e.g., 0200, 0400, etc.).
4. Enter the **Quantity**.
5. Enter the **Project Item Unit Price**.
6. **Non-Bid**: Check the box for all **Non-Bid and for all F/A items**.
7. Confirm that the **Combine with Like Items** check box is checked. Click **Save**.

Items (Worksheet) New 0 added | 0 marked for deletion | 0 changed

0005 202-00035 - Removal of Pipe

Item ID* 202-00035 Removal of Pipe

Category ID* 0200 - ROADWAY

Project Item Previous Price:

Project Item Supp Description:

Unit of Measure: LF - Lin Foot

Quantity: 10.000

Project Item Unit Price: 20.00000

Extended Amount: 200.00

Non-Bid:

Combine With Like Items:

Item Alternate Set ID:

Alternate Member ID:

Estimation Type: Ad Hoc

Reminder



After adding any new items, make sure you assign funding to those items. Funding can be assigned individually by expanding the category or by removing and re-establishing funding for the entire category.



5.0 Fund Packet Overview

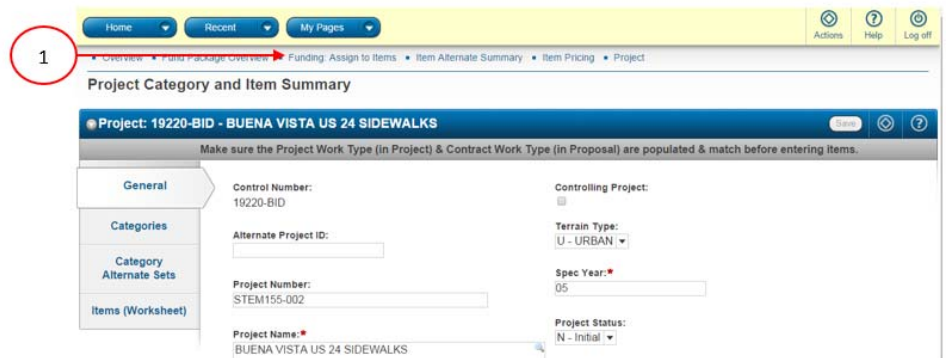
Default fund packages will be created when the project is transferred from Accessories. These fund packages will be adjusted when the project is received in the accounting department. The Project Engineer's responsibility will be to ensure that the Items assigned to the project are associated with the correct fund package.

Fund Package	Description	Project Level	Funds
0000	BID DEFAULT	?	?
0400	CONSTRUCTION ENGINEERING BID ITEMS	?	1

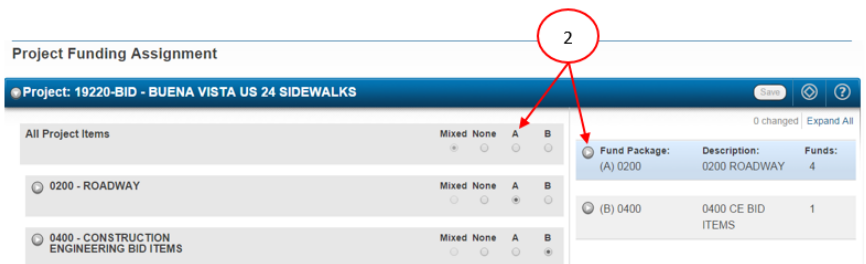
Figure 1: Example of Default Fund Packages

5.1 Assigning Item Funding

1. Select the **Funding Assign to Items** link.



2. For each Category, select the corresponding **Fund Package** (e.g., A to A, B to B) then click **Save**.



Reminder



Validate Your Projects



The validation process generates a list of warnings about the state of the project by flagging any missing or conflicting information.

If any error messages appear, return to the appropriate field, link, or Action and make any necessary corrections.



6.0 Non-Bid Projects

There will be individual Non-Bid Projects for every Project in a Combo and you must perform all the same steps as for a Bid Project.

- Make sure that the CE % is “0” for all Non-Bid Categories.
- For Design items, Category 0100 enter the item’s original price in Project Item Unit Price and Project Item Previous Price.

When there are both P & NP Design Items in Category 0100, in order for Form 65 to work:

- Be sure to create a separate Fund Package with NP/Non-Federal Funding Only for item #000-00005.
- Create another Fund Package with the P/Federal Funding (plus state match if applicable) for item #000-00010.

Reminder



Preliminary Detail Estimate



The Preliminary Detail Estimate is a group of six (6) reports that use the Engineer's estimated prices to provide a Project, Proposal, or Prime Project view of costs including CE and Indirects and Funding breakdowns.

It allows the designer to verify that all costs have been included and that their project will be within budget.

Compare the Estimate total (less 0400 items) to Form 65 Line 25 to ensure that they match.



7.0 Prime Projects

Verify that the information in the following tabs is correct and add any information necessary.

- The **General** tab should auto populate. **Be sure to add the Long Description.**
- The **Projects** tab should auto populate and will include both the Bid and Non-Bid Projects for all combined Projects.

The screenshot shows the 'Prime Project Summary' interface. At the top, there is a navigation bar with 'Overview' and 'Prime Project: 19220-COMBO - BUENA VISTA, US 24'. Below this is a sidebar with tabs for 'General', 'Projects', and 'Workflow'. The 'Projects' tab is active, displaying a table of project details. The table has columns for 'Control Number', 'Project Name', 'Spec BK', and 'Unit Sys'. The table is divided into sections for 'Control Proj: Yes' and 'Control Proj: No'.

Control Number	Project Name	Spec BK	Unit Sys
19220-BID	BUENA VISTA US 24 SIDEWALKS	05	English
Control Proj: Yes			
19220-NONBID	BUENA VISTA US 24 SIDEWALKS	05	English
No	STEM155-002		
Control Proj: No			
19225-BID	SALIDA US 50 SIDEWALKS PHASE I	05	English
No	STEM150-003		
Control Proj: No			
19225-NONBID	SALIDA US 50 SIDEWALKS PHASE I	05	English
No	STEM150-003		

Reminder



- The Proposal contains all biddable item quantities which are organized as a Proposal Schedule, Bid Schedule, or Schedule of Items for contractor bidding purposes. This is then exported into the contract as the Contract Price Schedule.
- The Proposal Component houses all details pertinent to the contractor including the contract type, type of time charges, and number of contract days.
- The Proposal is also used for the Notice to Contractors which is a report that serves as both a legal notice to the public that proposals are available for bid and is submitted to the media for publication.



8.0 Proposals

A Proposal is one or more Bid Projects grouped together for bidding purposes. When a Proposal contains more than one project, the project items are rolled up to a Proposal view so that bidders only have to view and price items once.

Verify that the information in the following tabs is correct and add any necessary information.

8.1 Proposal Summary

- **General Tab**

- **Contract Work Type** must be selected and must match the **Project Work Type** in the Project General tab.
- Add five (5) digit subaccount numbers for all projects next to Project Number.
- Enter the **Proposal Long Description**. This area provides enough space for a description of the project and any mandatory Pre-Bid information. NOTE: This information will be provided for the Advertisement/ Notice to Contractors.
- **Proposal Primary County** must be set.
- Add the **Publication Date/Ad Date**.
- Only one goal for the **DBE participation** will be needed for the single Project.
- Verify the **Resident Engineer Cost Center**.

Proposal Summary



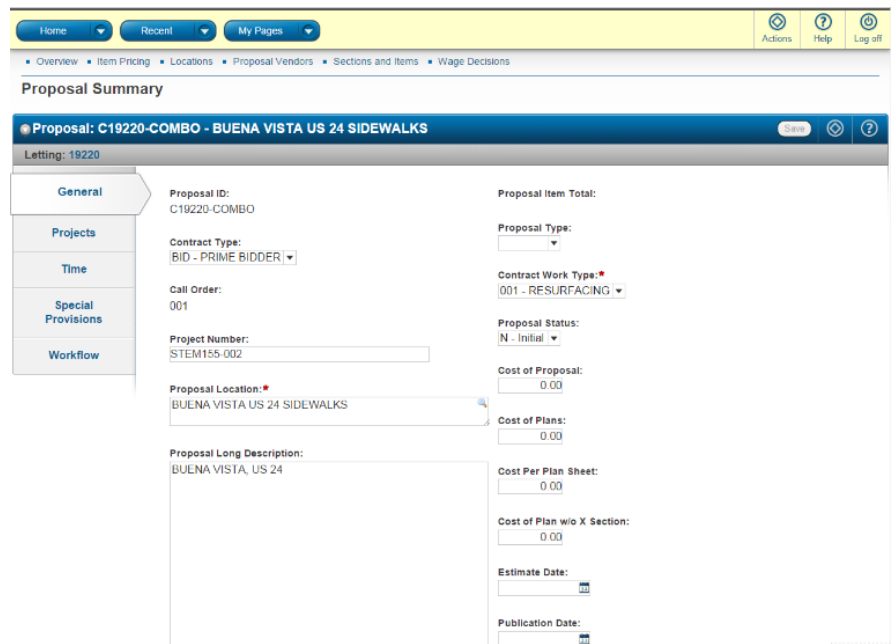
The Proposal Summary component contains all of the information currently associated with the proposal including its assigned projects, proposal time information, and special provisions.

Information is grouped on four tabs located on the left side of the component.

- General
- Projects
- Time
- Workflow



- **Projects Tab**
 - Bid project(s) only – confirm that **Control Project** is checked for Bid Project matching Proposal.
- **Workflow Tab**
 - Proposal Workflow drives Project(s) Workflow. Originates in Project & Proposal Creation and Estimation.



Tab Time



This tab is used to maintain proposal times.

A proposal time is a specific time period during which a defined amount of work is to be accomplished.

There are different types of times but each proposal must have at least one time row of the total contract time type recorded before the proposal can be let.

Subsequent proposal times can be added throughout the life of the proposal. If a proposal has more than one time row, the total contract time is designated as the main (or controlling) proposal time.



- **Time Tab**

1. Click **New**. **Note:** The **Time ID** should be 00.
2. The **Time Description** should be **Contract Site**.
3. **Time Type** must match **Project Special Provisions**.
4. In the **Number of Time Units** field, enter the number of days.
5. In the **Time Unit** field, select **Days**.
6. Check the box under **Main Proposal Time**.
7. In the **Liquidated Damages Rate** field, enter the daily rate.
8. Under **Liquidated Damages Unit of Time**, select **Days**.
9. Only complete the **Road User Cost Per Time Unit** for cost plus time/A Plus B project which will result in an additional “Time” Proposal Section. This will be a dollar value.

The screenshot shows the 'Proposal Summary' interface for a proposal titled 'C19220-COMBO - BUENA VISTA US 24 SIDEWALKS'. The 'Time' tab is selected, showing a table with one row for '00 - CONTRACT SITE'. Red circles with numbers 1 through 8 point to the following fields: 1. Time ID (00), 2. Time Description (CONTRACT SITE), 3. Time Type (CD), 4. Number of Time Units (92), 5. Time Unit (Days), 6. Main Proposal Time (checked), 7. Liquidated Damages Unit of Time (Days), and 8. Road User Cost Per Time Unit.

Reminder



- Verify that all items were correctly assigned to Section 001 by going to the Actions button. Select Assign Items to Sections to ensure that all items are assigned to Section (A) 0001.
- Return to The Projects List and select the next Bid Project of the Combo. Ensure that all Categories are assigned to Section (A) 0001.
- Remember to assign any new items to the Proposal Section after they are added to the Bid Project by expanding the appropriate category and individually assigning them to Section (A) 0001.

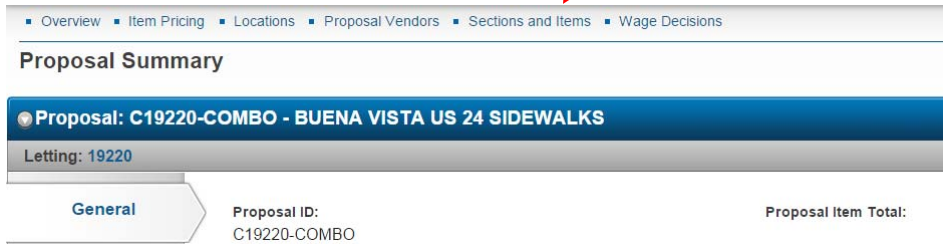
Validate your Proposal



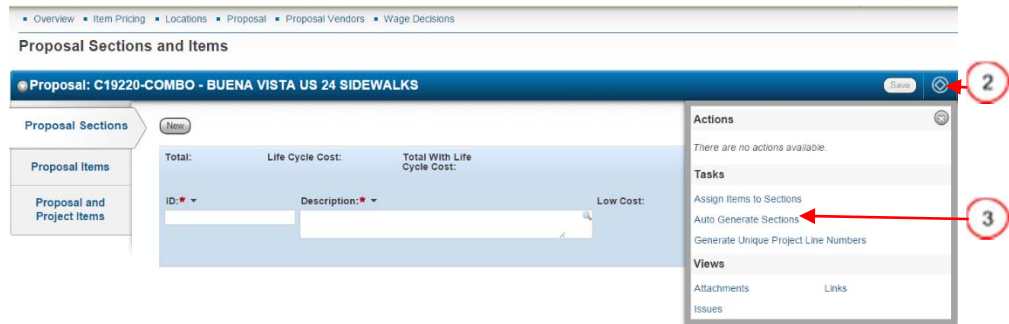
- The validation process generates a list of warnings about the state of the project and flags any missing or conflicting information.
- If any error messages appear, return to the appropriate field, link, or action and take the necessary steps to make the corrections.

8.2 Sections and Items Link

1. Select the **Sections and Items** link.



2. Go to **Actions** at the **Proposal Component** level.
3. Select **Auto Generate Sections**.



4. Verify the **ID** - (0001).
5. In the **Description** field, change the information from Roadway to **BID ITEMS**.



Reminder



Review the entire Proposal Schedule to confirm that all like items from all Projects have been combined as expected.

If not, you will need to Auto Generate Sections again and rename the Section BID ITEMS.



8.3 Printing Reports

8.3.1 Proposal Price Schedule Report

In the **Proposal Summary**:

1. Go to **Actions**.
2. Under **Reports**, select the **Proposal Price Schedule** report.
3. Select **Execute**.

The screenshot displays the AASHTOware Proposal Summary interface for proposal C19222 - ER US 24 VOID REPAIR. The interface includes a navigation bar with tabs for Overview, Item Pricing, Locations, Proposal Vendors, Sections and Items, Wage Decisions, and Cost Estimate. The main content area shows proposal details such as Proposal ID (C19222), Contract Type (BID - PRIME BIDDER), Call Order (001), Project Number (ER 0241-059), and Proposal Location (ER US 24 VOID REPAIR). A right-hand sidebar contains an Actions menu with various options. A red circle with the number '1' highlights the Actions menu icon in the top right corner. Another red circle with the number '2' highlights the 'Proposal Price Schedule' option within the Reports section of the Actions menu.

Reminder

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In order to run a Notice to Contractors, you must enter a Publication Date/Ad Date in the Proposal General tab.

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8.3.2 Notice to Contractors Report

In the Proposal Summary:

1. Go to **Actions**.
2. Under **Reports**, select the **Notice To Contractors** report.
3. Then select **Execute**.

The screenshot shows the 'Proposal Summary' page for proposal C19222. The 'Actions' menu is open, and the 'Notice To Contractors' option is highlighted with a red arrow and a circled '2'. A red arrow and a circled '1' point to the 'Actions' button in the top right corner of the proposal summary header.

Proposal Summary | AASHTOware Project(tm) - Google Chrome
https://cdot2k12awpr.dot.state.co.us/#/Proposal/4469/Summary

Home Recent My Pages Actions Help Log off

Overview Item Pricing Locations Proposal Vendors Sections and Items Wage Decisions Cost Estimate

Proposal Summary

Proposal: C19222 - ER US 24 VOID REPAIR Save ?

Letting: 20120718

General Proposal ID: C19222
Contract Type: BID - PRIME BIDDER
Call Order: 001
Project Number: ER 0241-059
Proposal Location: ER US 24 VOID REPAIR
Proposal Long Description: The project is located on US 24 in Eagle and Lake counties. It begins at MP 165.0 and extends approximately 0.5 miles to MP 166.5. Work includes grout repair of surface and subsurface voids, hot mix asphalt, embankment and traffic control management.

Contract Qualification Class 1
Contract Qualification Class 2

Proposal Funding
Proposal Type
Contract Work T
Resident Engine: 3120 - 3120
Proposal Primary: C044 - EAGLE
Proposal Status: A - Awarded
Status Date: 07/19/2012
Cost of Proposal: 0.00
Cost of Plans: 10.00
Cost Per Plan S
Cost of Plan wo

Actions
Add New
Tasks
Export To Expedite
Generate Unique Project Line Numbers
Validate Proposal
Views
Attachments
Bid Entry
Issues
Item Pricing
Links
Reports
Additive Sections
Awarded Vendor Mailing Labels
Bid Letting Summary
Bid Tab Analysis
Bid Tab Edit
CDOT EEMA Bid Analysis XLS
CDOT Proposal Price Schedule XLS
CDOT Proposals Ready To Pass To SM
Contract Price Schedule
Notice To Contractors
Proposal Fiscal Year Schedule
Proposal Planholders List
Proposal Price Schedule
Quantity Sheet Summary
Transport data required by Bid Express
Validate Proposal & Project Prior to Ad
Vendor Invoices