NC Department of Transportation

Contract Standards & Development

Division Letting Administration

User Guide

Table of Contents

CHAPTER 1 APPLICATIONS....1-1
THE WORKORDER APPLICATION 1-1
The Menu Bar 1-2
Toolbar Buttons.... 1-2
THE TRNS•PORT PROPOSAL AND ESTIMATES SYSTEM (PES).... 1-3
The Menu Bar 1-4
Toolbar Buttons.... 1-6
THE TRNS•PORT LETTING AND AWARDS SYSTEM (LAS) 1-8
The Menu Bar 1-9
Toolbar Buttons.... 1-11
THE EXPEDITE ENTRY APPLICATION 1-13
The Menu Bar 1-14
Toolbar Buttons.... 1-15
THINGS TO KNOW BEFORE YOU BEGIN 1-16
IMPORTANT! 1-16
THE FILTER DIALOG 1-17
SAVE VS. SAVE AS.... 1-18
CHANGING YOUR PASSWORD (TRNS•PORT APPLICATIONS) 1-19
CHAPTER 2 SETTING UP A PROJECT....2-1
GENERATING A CONTRACT NUMBER 2-1
Logging Into Citrix 2-1
Logging Into the Workorder Application 2-2
COPYING A CONTRACT RECORD.... 2-7
EDITING A CONTRACT RECORD 2-9
DELETING A CONTRACT RECORD 2-11
CREATING A PROJECT ESTIMATE TEMPLATE 2-13
Logging Into Citrix 2-13
Logging Into the Trns•port PES Application.... 2-15
Adding a Project.... 2-17
General Tab.... 2-19
Counties Tab 2-24
Categories Tab 2-26
Creating the System Required Category 2-28
Adding a Roadway Category 2-28
Categories for Non-Participating Items 2-30
COPYING A PROJECT.... 2-31
Finding the Project Estimate Template 2-32
CUSTOMIZING A COPIED PROJECT 2-36
Deleting a Category.... 2-37
Adding a Category 2-39
Adding Additional Category Types.... 2-39
Adding a Culvert Category.... 2-40
Adding a Wall Category.... 2-42
Adding a Structure Category 2-45
CHAPTER 3 QUANTITY ESTIMATION....3-1
IMPORTING PAY ITEMS FROM NC RESURFACING ESTIMATE 3-1
Exporting the Trns•port Export File 3-1
Importing the Trns•port Export File into PES 3-3
Resurfacing Error Report 3-8
IMPORTING PAY ITEMS FROM GEOPAK 3-9
GeoPak Error Report.... 3-14
IMPORTING PAY ITEMS FROM SAPW 3-15
ADDING PAY ITEMS MANUALLY 3-19
Assigning Breakdown IDs.... 3-24
Assigning Breakdown Item Line Numbers 3-25
Assigning Project Item Line Numbers 3-25

IMPORTANT! 3-25
EDITING PAY ITEMS 3-26
Data-Entry Fields 3-26
Inserting Pay Item Rows 3-26
Deleting Pay Item Rows 3-27
ALTERNATE ITEMS 3-29
FORCE ACCOUNT ITEMS 3-31
IMPORTANT! 3-32
CUSTOMIZING THE WORKSHEET VIEW 3-35
Hiding Columns 3-35
Displaying Hidden Columns 3-37
Moving Columns 3-39
Sorting Data 3-40
Filtering Data in the Item List 3-42
Creating a Saved Filter 3-45
Using a Saved Filter 3-49
CHAPTER 4 PROPOSAL SETUP 4-1
SETTING UP A PROPOSAL 4-1
General Tab 4-3
Cluster Indicator 4-6
Description Tab 4-6
Projects Tab 4-7
Items Tab 4-9
Sites Tab 4-10
ADDITIONAL METHODS OF REVIEW & ENTRY 4-14
Reviewing Data 4-14
Copying From Project to Proposal 4-14
CHAPTER 5 COST ESTIMATION 5-1
GENERATING BID-BASED PRICES 5-1
LOCKING IN PRICES 5-11
CHAPTER 6 LETTING SETUP 6-1
UPDATING PROJECT CONTROL AT THE PROJECT LEVEL 6-1
UPDATING PROJECT CONTROL AT THE PROPOSAL LEVEL 6-4
SETTING UP A BID LETTING 6-7
Logging Into Citrix 6-7
Logging Into the Trns•port LAS Application 6-8
Adding a Bid Letting Package 6-10
Letting Number Format 6-12
LINKING PROPOSALS TO A LETTING 6-14
IMPORTANT! 6-17
UNLINKING A PROPOSAL FROM A LETTING 6-18
IMPORTANT! 6-18
INITIALIZING LETTING PROPOSALS 6-25
CHAPTER 7 ADVERTISEMENT 7-1
PRINTING THE ADVERTISEMENT 7-1
CHAPTER 8 BID PREPARATION 8-1
CREATING THE EBS FILE 8-1
Running the EBS File Generation Process 8-1
Downloading the EBS File from the Application Server 8-8
Generating the EBS File(s) in DOS 8-12
CREATING THE DBE_NC.BIN FILE 8-15
Encrypting the File 8-22
Renaming the File 8-23
CREATING THE LETTING MASTER ON PORTABLE MEDIA 8-24
CHAPTER 9 ADDITIONAL PRE-LETTING PROCEDURES 9-1
ADDING A PLANHOLDER TO A LINKED PROPOSAL 9-1
CHAPTER 10 ADDENDA 10-1
ADDING AN ADDENDUM ITEM 10-1
CREATING AN ADDENDUM FOR ITEM MODIFICATION 10-9
CREATING AN ADDENDUM FOR ITEM REMOVAL 10-16

CHANGING AN ADDENDUM ITEM 10-22
DELETING AN ADDENDUM ITEM 10-25
COMPLETING THE ADDENDA PROCESS 10-27
APPLYING AN ADDENDUM IN EXPEDITE 10-29
CHAPTER 11 LETTING DAY ACTIVITIES 11-1
PROCESSING HAND-ENTERED BIDS WITH EXPEDITE 11-2
IMPORTANT! 11-2
The First time you use Expedite 11-5
ADDING DBE/MBE/WBE ENTRIES IN EXPEDITE ENTRY 11-8
LOADING HAND-ENTERED BIDS INTO LAS 11-17
Uploading the Xtabdat.dat File 11-17
Uploading the Xdbedat.dat File 11-18
Running the Load Bid Tabs Process 11-21
IMPORTANT! 11-24
LOADING ELECTRONICALLY SUBMITTED BIDS INTO LAS 11-25
Loading Contractor Information from Portable Media 11-25
Copying the Vendor File to your hard drive. 11-25
Renaming the vendor file 11-25
Uploading the XtabDat.DAT File 11-27
Uploading the Xdbedat.dat File 11-29
Running the Load Bid Tabs Process 11-31
RECONCILING BIDS IN LAS 11-35
IMPORTANT! 11-39
ADDING NOTES FOR BID IRREGULARITIES 11-40
PROCESSES REQUIRED FOR BID ANALYSIS 11-43
The Bid Tab Edit Report 11-45
Bid Tab Analysis 11-50
Bid Letting Summary 11-55
UPDATING CONTRACT STATUS 11-60
ASSIGNING THE CORRECT RESIDENT ENGINEER 11-63
Creating a Filter 11-65
AWARDING A CONTRACT 11-68
REJECTING A CONTRACT 11-73
EXECUTING A CONTRACT 11-78
Contract Re-Execution 11-82
WHEN YOU ARE FINISHED… 11-83
IMPORTANT! 11-83
APPENDIX A GLOSSARY A-1
APPENDIX B SUPPLEMENTAL DESCRIPTIONS B-1
APPENDIX C REPORTS C-1
SETTING DESKPDF AS THE DEFAULT PRINTER C-1
CUSTOM REPORTS C-3
PROPOSAL ITEM SHEETS (FOR A PROPOSAL) C-8
PROPOSAL ITEM SHEETS (FOR A LETTING) C-11
ADVERTISEMENT C-13
ENGINEER'S ESTIMATE (WITH BREAKDOWN) C-16
ENGINEER'S ESTIMATE (WITHOUT BREAKDOWN) C-19
PROJECT SUMMARY C-22
ESTIMATE VS. LOW BIDDER C-24
BID TABULATIONS C-25
DBE/MBE/WBE INTEREST REPORT C-28
CONTRACT ITEM SHEETS C-30
ITEM C C-32
SAVING A REPORT AS A PDF C-34
PRINTING A SAVED REPORT C-36

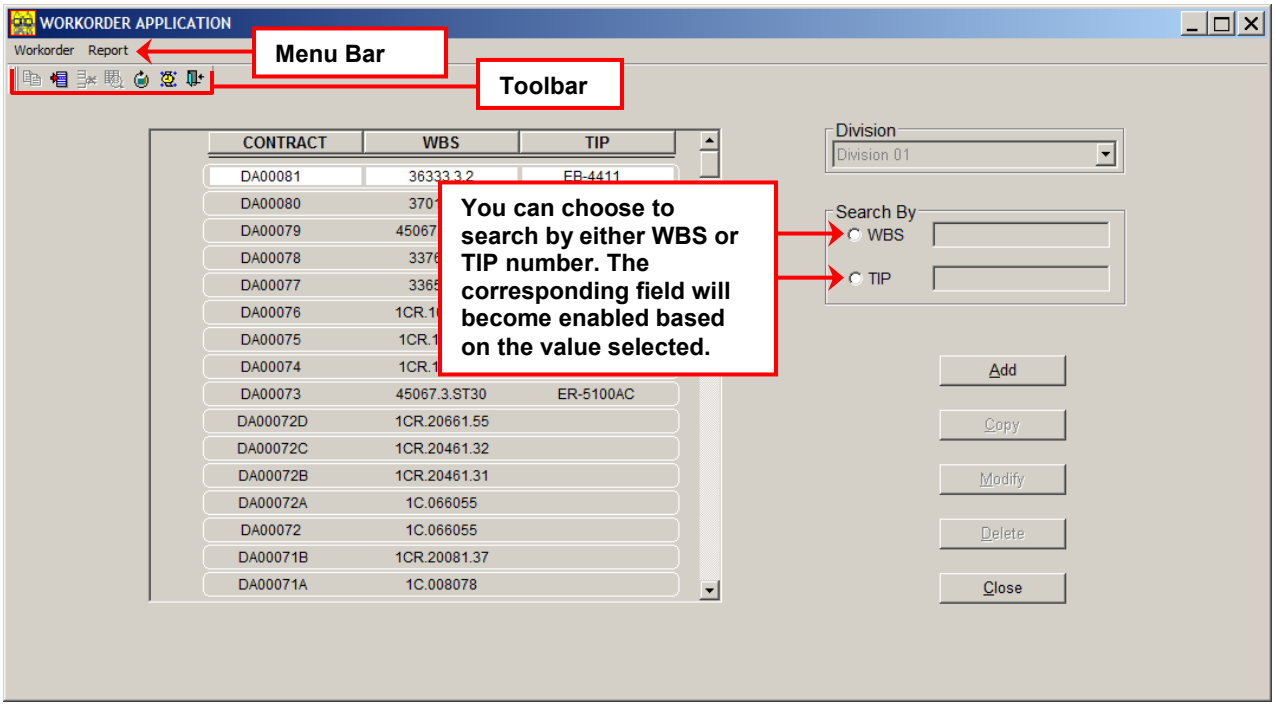
Chapter 1 Applications

The Workorder Application

The **Workorder Application** is used to associate WBS numbers with Contract numbers.

A project must first be entered here to obtain a contract number so that it can be set up in the Trns•port PES application.

🗁**NOTE:** Make sure your monitor resolution is set above **1280 x 800** pixels in order to view this application at its optimal resolution.



(*Workorder Application Main Window*)

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The Workorder Application

(continued)

The Menu Bar

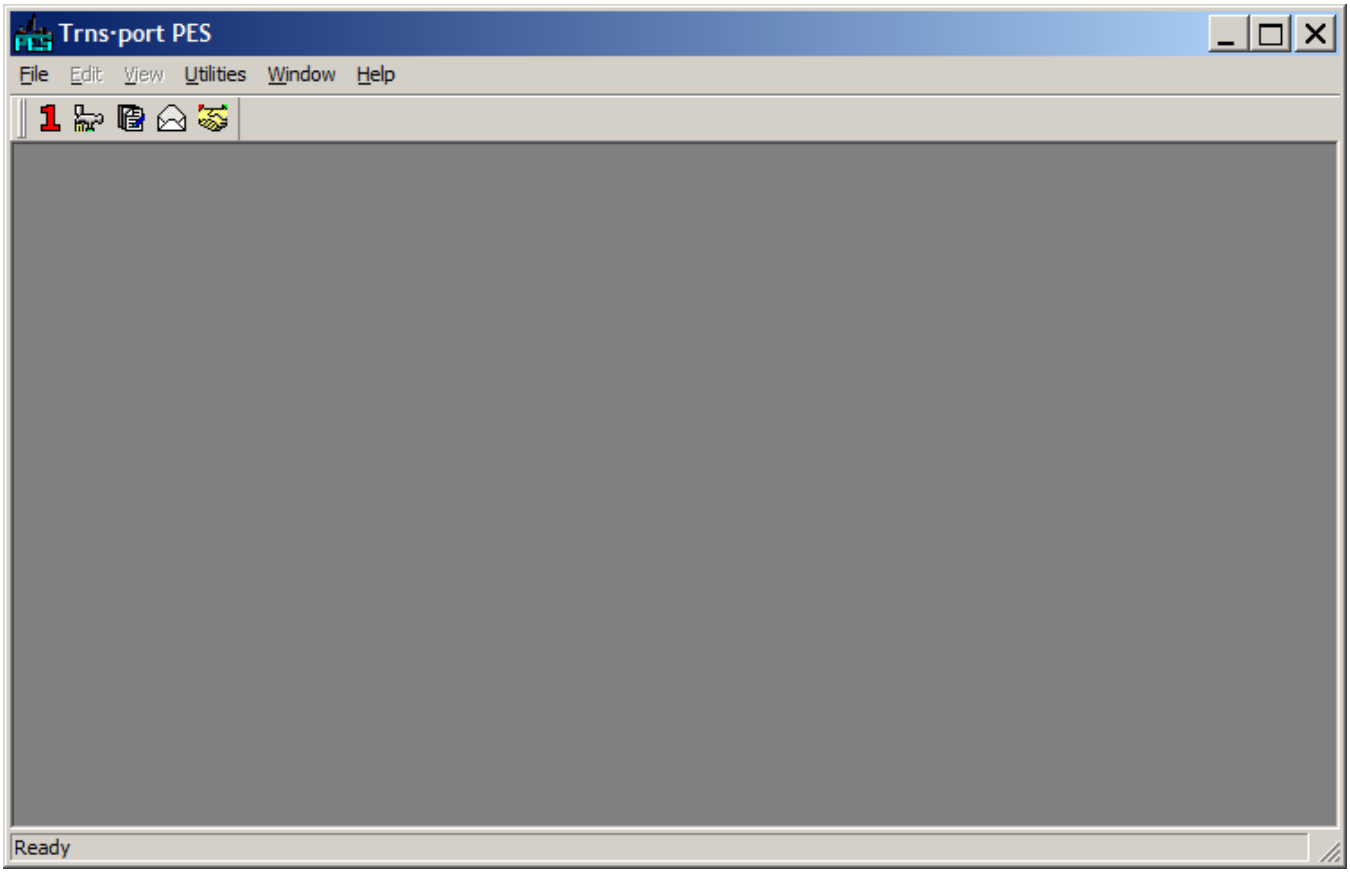
The **Workorder Drop-Down Menu** contains all actions that can be done to contract records.

Toolbar Buttons

	Copy: This button allows you to copy a record.
	Insert: This button allows you to insert a new record.
	Delete: This button allows you to delete a record.
	Modify: This button allows you to change an existing record.
	Refresh: This button refreshes the database.
	Version: This button tells you what version of the application you are using.
	Close: This button closes the application.

The Trns•port Proposal and Estimates System (PES)

The Trns•port Proposal and Estimates System is used to produce estimates and prepare proposals for prospective bidders.



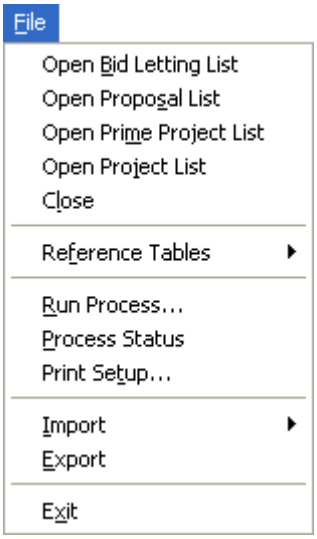
(*Trns•port Proposal and Estimates System Main Window*)

The Trns•port Proposal and Estimates System (PES)

(continued)

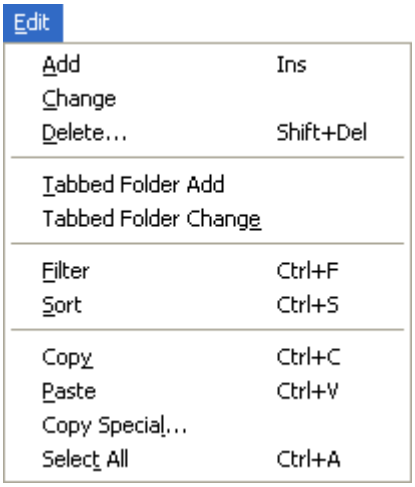
The Menu Bar

NOTE: Some of the following drop-down menu options may be different based on which window you have open at the time.



The **File Drop-Down Menu** contains all ***List Open*** actions, ***Process Run*** options, and ***Data Import/Export*** actions.

It also contains options to ***Close*** the current window, access options for ***Print Setup***, and ***Exit*** the application.



The **Edit Drop-Down Menu** contains all ***Record Add***, ***Change*** or ***Delete*** options and ***Folder Add*** or ***Change*** options.

It also contains options to ***Filter*** and ***Sort*** items and contains the usual edit functions of ***Copy***, ***Paste***, ***Copy Special***, and ***Select All***.

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The Trns•port Proposal and Estimates System (PES)

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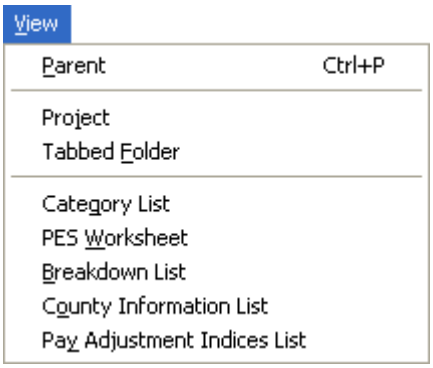
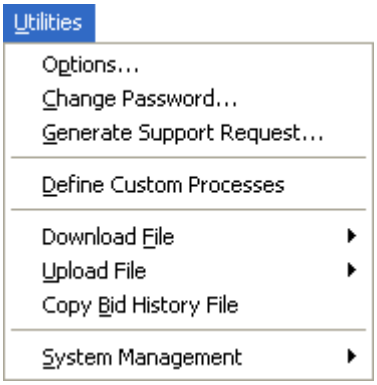


The **View Drop-Down Menu** contains options for viewing data such as the ***Parent*** window, the ***Project***, or the ***Tabbed Folder***.

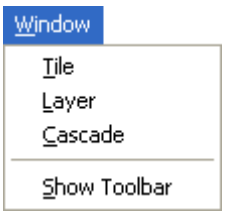
It also contains direct links to the ***Category List***, ***PES Worksheet***, ***Breakdown List***, ***County Information List***, and ***Pay Adjustment Indices List***.



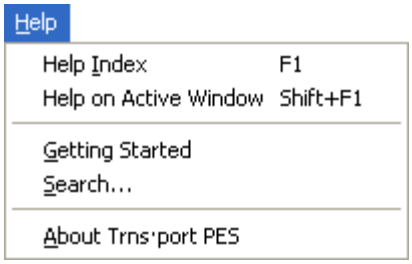
The **Utilities Drop-Down Menu** contains general application ***Options***, a ***Password Change*** utility, a ***Support Request*** generator, and a list of ***Custom Processes***.

It also contains options to ***Download*** and ***Upload Files*** and copy the ***Bid History File*** for external use.

If you are a **System Administrator**, you will also have access to ***System Management*** functions.



The **Window Drop-Down Menu** contains general options for arranging the open application windows and showing/hiding the toolbar.



The **Help Drop-Down Menu** allows you to access an ***Online Help*** file. You will also be able to view a popup with general information about the application such as the current version number.

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The Trns•port Proposal and Estimates System (PES)

(continued)

Toolbar Buttons

NOTE: The buttons shown on the toolbar will change according to the function you are performing at the time.

	Prime Projects Button: This button opens a list of prime projects.
	Projects Button: This button opens a list of projects
	Proposals: This button opens a list of contract proposals.
	Bid Lettings: This button opens the bid letting list.
	Vendors: This button opens the list of vendors.
	Close: This button closes the current window.
	Save Folder: This button Saves the current folder.
	Filter: This button applies a filter to the current list.
	Sort: This button sorts the current list.
	Parent Window: This button makes the current window active.
	Project/Proposal: This button allows you to view project or proposal details.
	Category: This button allows you to view categories for a project.
	PES Worksheet: This button allows you to view the PES Worksheet.
	Breakdowns: This button allows you to view the breakdown list for a project.
	Project Counties: This button allows you to view the counties in a project.
	Pay Adjustment Indices: This button allows you to view the pay adjustment indices in a project.

Continued on Following Page

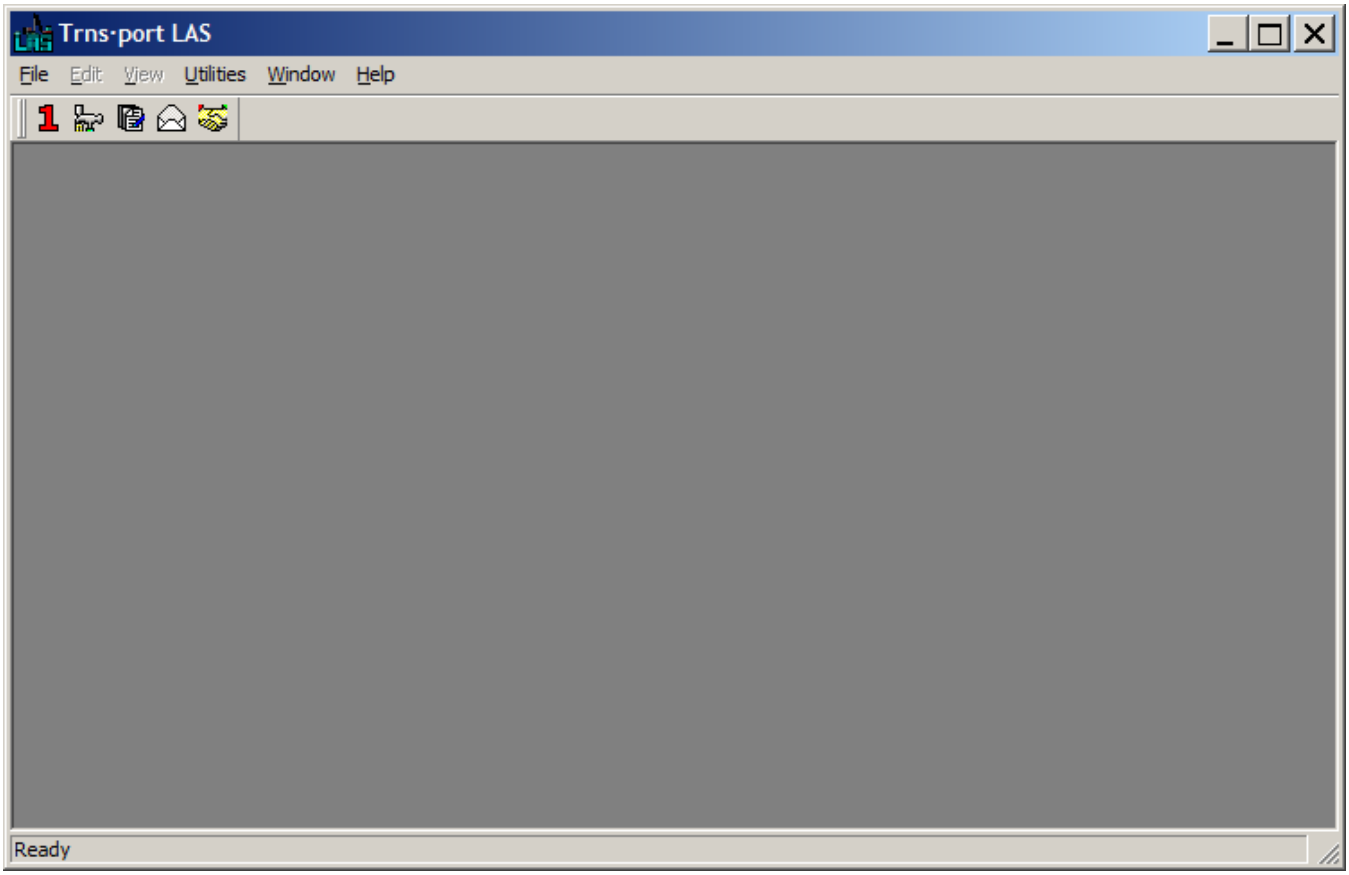
The Trns•port Proposal and Estimates System (PES)

(continued)

	Proposal Projects: This button allows you to view a list of projects in a proposal.
	Proposal Description: This button allows you to view/edit the long description of a proposal.
	Proposal Addendums: This button allows you to view the list of addendums to a proposal.
	Proposal Items: This button allows you to view the open list of items in a proposal.
	Special Provisions: This button allows you to view the list of special provisions in a proposal.
	Proposal Sites: This button allows you to view the list of site locations for a proposal.
	Proposal Sections: This button allows you to view the sections of a proposal.
	Letting Proposals: This button will show you associated letting proposals.

The Trns•port Letting and Awards System (LAS)

The **Trns•port Letting and Awards System** is used to process bid lettings, award contracts and maintain the vendor file.



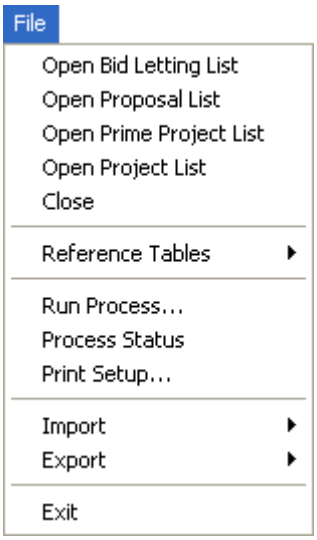
(*Trns•port Letting and Awards System Main Window*)

The Trns•port Letting and Awards System (LAS)

(continued)

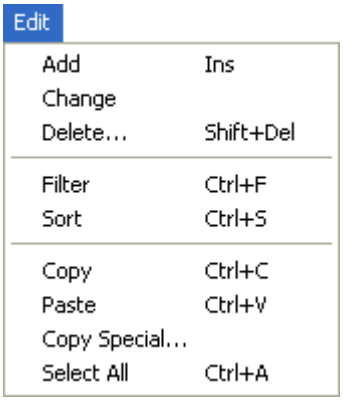
The Menu Bar

🗁**NOTE:** Some of the following drop-down menu options may be different based on which window you have open at the time.



The **File Drop-Down Menu** contains all ***List Open*** actions, ***Process Run*** options, and ***Data Import/Export*** actions.

It also contains options to ***Close*** the current window, view ***Reference Tables***, access options for ***Print Setup***, and ***Exit*** the application.



The **Edit Drop-Down Menu** contains ***Add***, ***Change*** or ***Delete*** options.

It also contains options to ***Filter*** and ***Sort*** items and contains the usual edit functions of ***Copy***, ***Paste***, ***Copy Special***, and ***Select All***.

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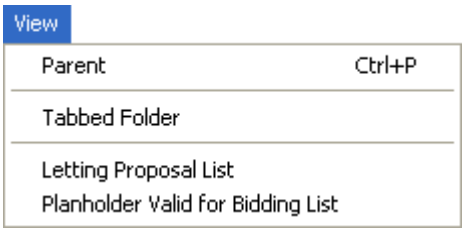
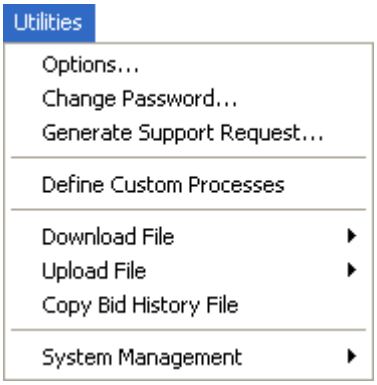
The Trns•port Letting and Awards System (LAS)

(continued)



The **View Drop-Down Menu** contains options for viewing data such as the ***Parent*** window, the ***Project***, or the ***Tabbed Folder***.

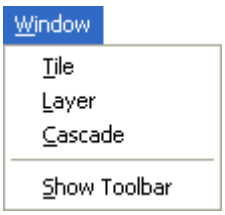
It also contains direct links to the ***Category List***, ***PES Worksheet***, ***Breakdown List***, ***County Information List***, and ***Pay Adjustment Indices List***.



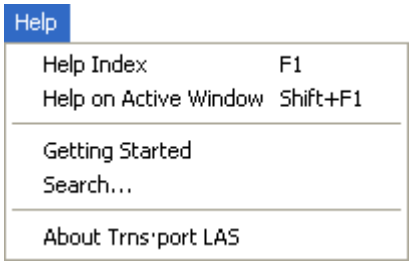
The **Utilities Drop-Down Menu** contains general application ***Options***, a ***Password Change*** utility, a ***Support Request*** generator, and a list of ***Custom Processes***.

It also contains options to ***Download*** and ***Upload Files*** and copy the ***Bid History File*** for external use.

If you are a **System Administrator**, you will also have access to ***System Management*** functions.



The **Window Drop-Down Menu** contains general options for arranging the open application windows and showing/hiding the toolbar.



The **Help Drop-Down Menu** allows you to access an ***Online Help*** file. You will also be able to view a popup with general information about the application such as the current version number.

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The Trns•port Letting and Awards System (LAS)

(continued)

Toolbar Buttons

NOTE: The buttons shown on the toolbar will change according to the function you are performing at the time.

	Prime Projects Button: This button opens a list of prime projects.
	Projects Button: This button opens a list of projects
	Proposals: This button opens a list of contract proposals.
	Bid Lettings: This button opens the bid letting list.
	Vendors: This button opens the list of vendors.
	Close: This button closes the current window.
	Save Folder: This button Saves the current folder.
	Filter: This button applies a filter to the current list.
	Sort: This button sorts the current list.
	Parent Window: This button makes the current window active.
	Letting/Proposal: This button allows you to view the letting/proposal list.
	Planholders: This button opens the list of planholders to change their valid for bidding status.
	Vendor: This button allows you to view the details of a vendor.
	Vendor Addresses: This button allows you to view the list of addresses for a vendor.
	Vendor Officers: This button allows you to view the list of officers for a vendor.
	Work Classifications: This button allows you to view the list of work classifications for a vendor

Continued on Following Page

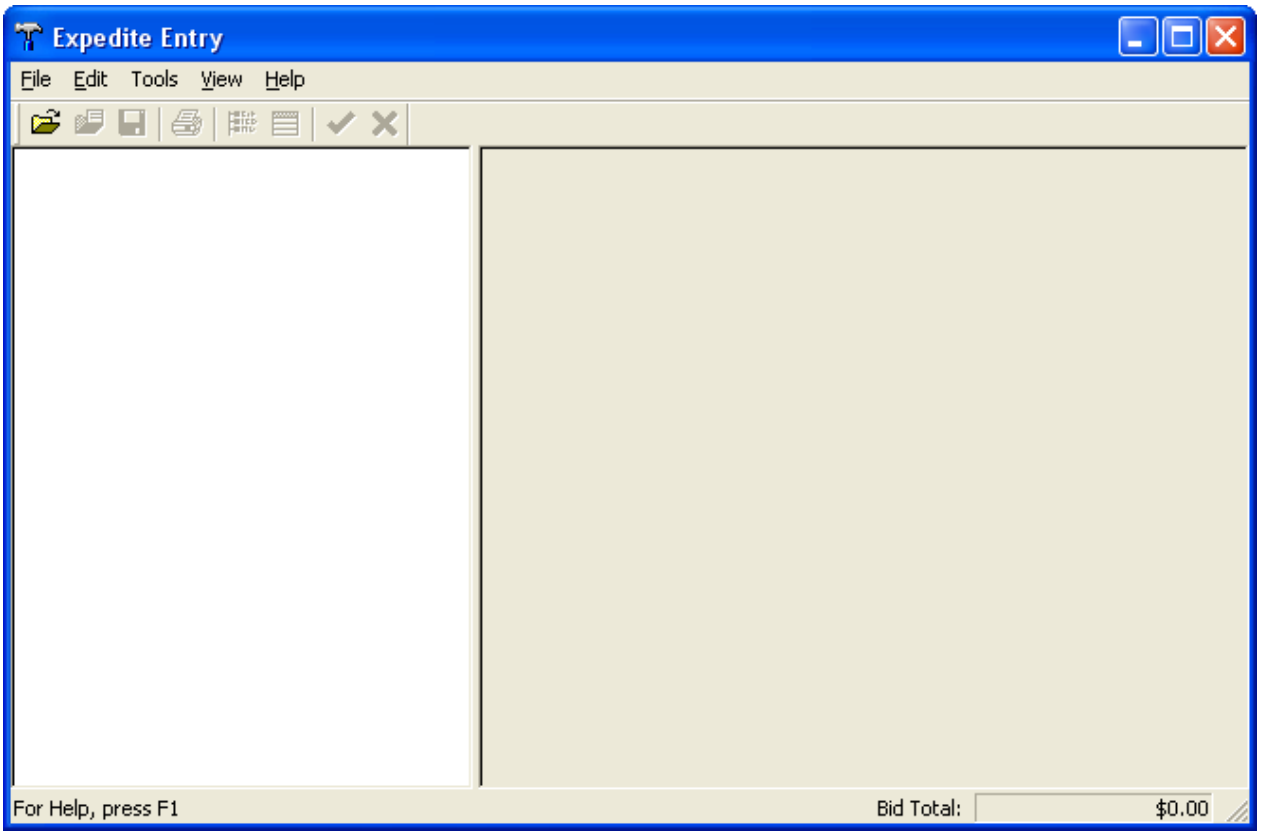
The Trns•port Letting and Awards System (LAS)

(continued)

	Vendor Insurance: This button allows you to view the list of insurance data for a vendor.
	Vendor Affiliations: This button allows you to view the list of affiliations to a vendor.
	Vendor Inquiry: This button opens the **Vendor Inquiry** window.

The Expedite Entry Application

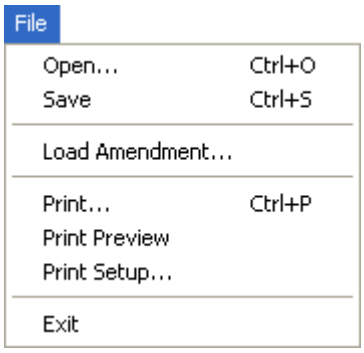
The **Expedite Entry** application is designed for use by the highway agency for entering paper-based bid data into the proper LOAD files. **Expedite Entry** automatically reads an electronic proposal and all of its amendments, and then allows you to enter a bidder identification code and all the bid data for that bidder. It stores the results directly in the Flat Bid File rather than in an Expedite file.



The Expedite Entry Application

(continued)

The Menu Bar

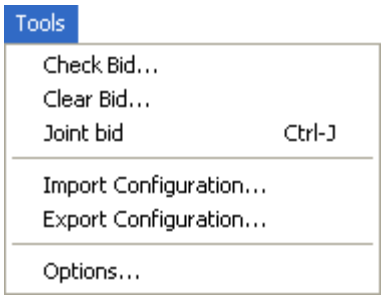


The **File Drop-Down Menu** contains general file actions such as ***Open***, ***Save*** and ***Print***.

It also contains options to ***Load Amendment*** (Addendum) files, provides ways to customize printing with ***Print Preview*** and ***Print Setup*** and gives users an additional way to ***Exit*** the application.

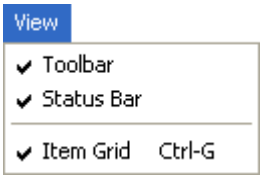
The **Edit Drop-Down Menu** contains the general text-edit options ***Copy*** and ***Paste***.

It also contains the option to ***Add*** a ***DBE Item*** to a bid.

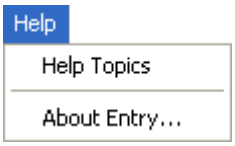


The **Tools Drop-Down Menu** contains options for bid functions such as ***Check Bid…***, ***Clear Bid…***, and ***Joint Bid***.

It also allows users to ***Import*** and ***Export Configuration*** files and contains ***Options*** for customization.



The **View Drop-Down Menu** allows you to choose if you would like to view the ***Toolbar***, the ***Status Bar***, or the ***Item Grid***.



The **Help Drop-Down Menu** allows you to access an ***Online Help*** file. You will also be able to view a popup with general information about the application such as the current version number.

The Expedite Entry Application

(continued)

Toolbar Buttons

NOTE: The buttons shown on the toolbar will change according to the function you are performing at the time.

	Open Button: This button opens a proposal file.
	Open Amendment Button: This button opens a proposal amendment file.
	Save: This button saves the proposal/bid.
	Print: This button prints the active document.
	Tree View: This button shows items in a tree view.
	Grid View: This button shows items in a grid view.
	Check Bid: This button checks the current bid.
	Clear Bid: This button clears the current bid.

Things to Know Before You Begin

While performing any procedure in this user guide, it is important to always leave your CapsLock key on. This way all information you type into the applications will have the same format and will be easier to search for.

NOTE: All applications are case-sensitive.

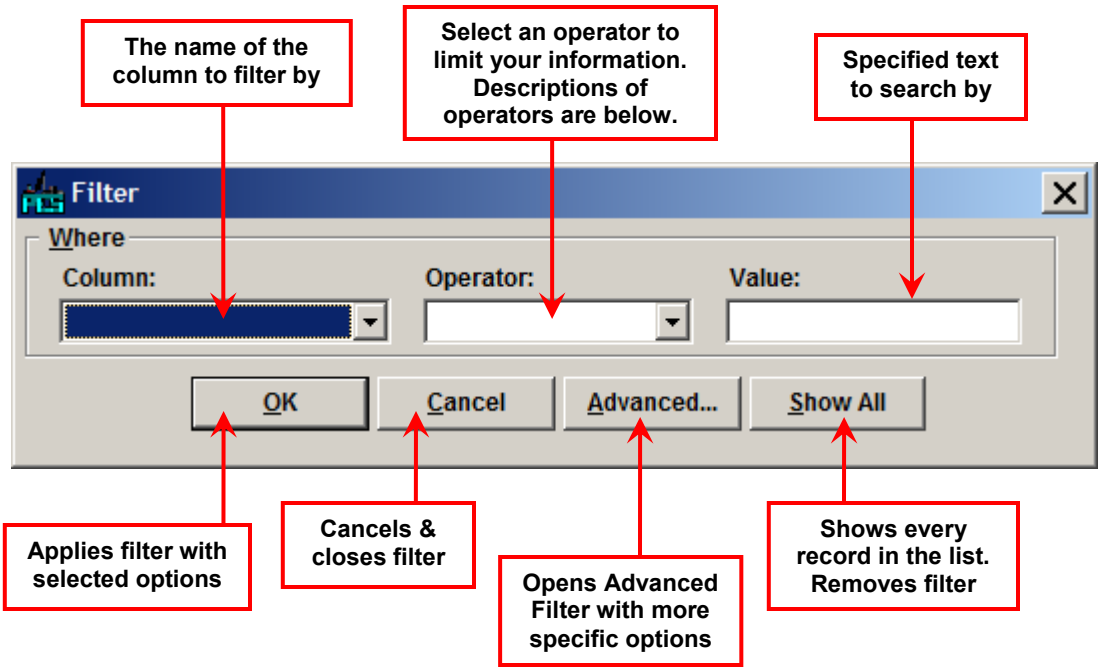
Access to the different options available in an application will be based on **User ID**.
Based on your specific job function, you may see some windows and not others that are shown in this User Guide.

IMPORTANT!

When exiting the Trns•port PES and Trns•port LAS applications, be sure to close the most recent window first and back out of each window individually instead of closing the entire application using the button. If you exit everything at once, you will cause your system to lock up!

The Filter Dialog

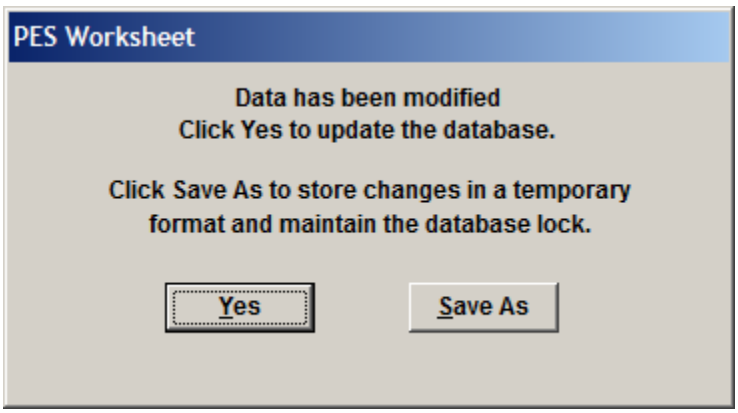
The two **Trns•port** applications (**PES** and **LAS**) are equipped with a filter dialog for long lists of data.



Operator	Definition
<	Less than
<=	Less than or equal to
<>	Not equal to
=	Equal to
>	Greater than
>=	Greater than or equal to
Contains	Contains
Does Not Contain	Does not contain
Like	Sounds like
Not Like	Does not sound like

Save vs. Save As…

When you are entering data in the two **Trns•port** applications (**PES** and **LAS**), you may encounter the following message:



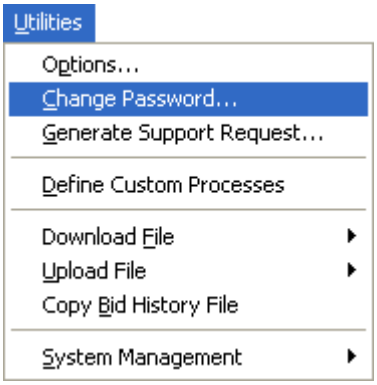
Always choose **YES**.

If you choose **SAVE AS**, your information will not be able to be retrieved. It will be saved in a temporary directory on the server, not in the working records that you are currently processing.

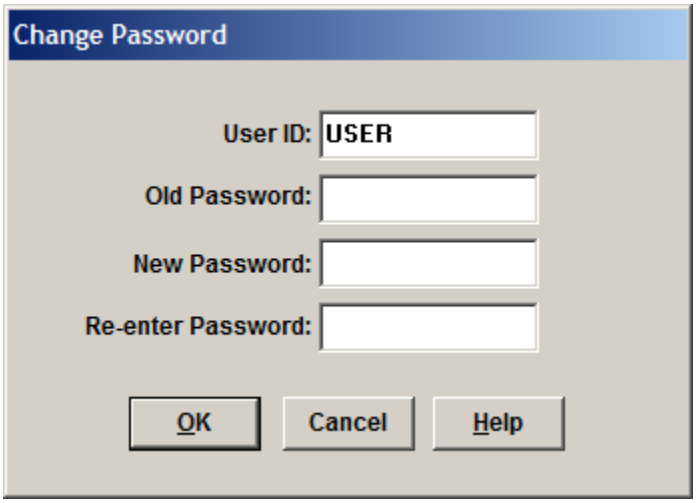
Changing Your Password (Trns•port Applications)

For the two **Trns•port** applications (**PES** and **LAS**) each user will be assigned a User ID (usually your NCDOT network ID) and a generic, first-time password.

It is important for you to change the password you are given the first time you log in to these applications.



Step	Action	Result
1	From the **UTILITIES** drop-down menu, select, **CHANGE PASSWORD**.	The **Change Password** dialog box will appear.



(*Change Password Dialog Box*)

2	Type your ***old password*** in the **OLD PASSWORD** field.	N/A

Continued on Following Page

Changing Your Password (Trns•port Applications)

(continued)

3	Type your ***new password*** in the **NEW PASSWORD** field. 🗁**NOTE:** The new password must be between 6 and 13 characters long.	N/A
4	Re-type your ***new password*** in the **RE-ENTER PASSWORD** field.	N/A
5	Click the **OK** button.	Your password will be changed.

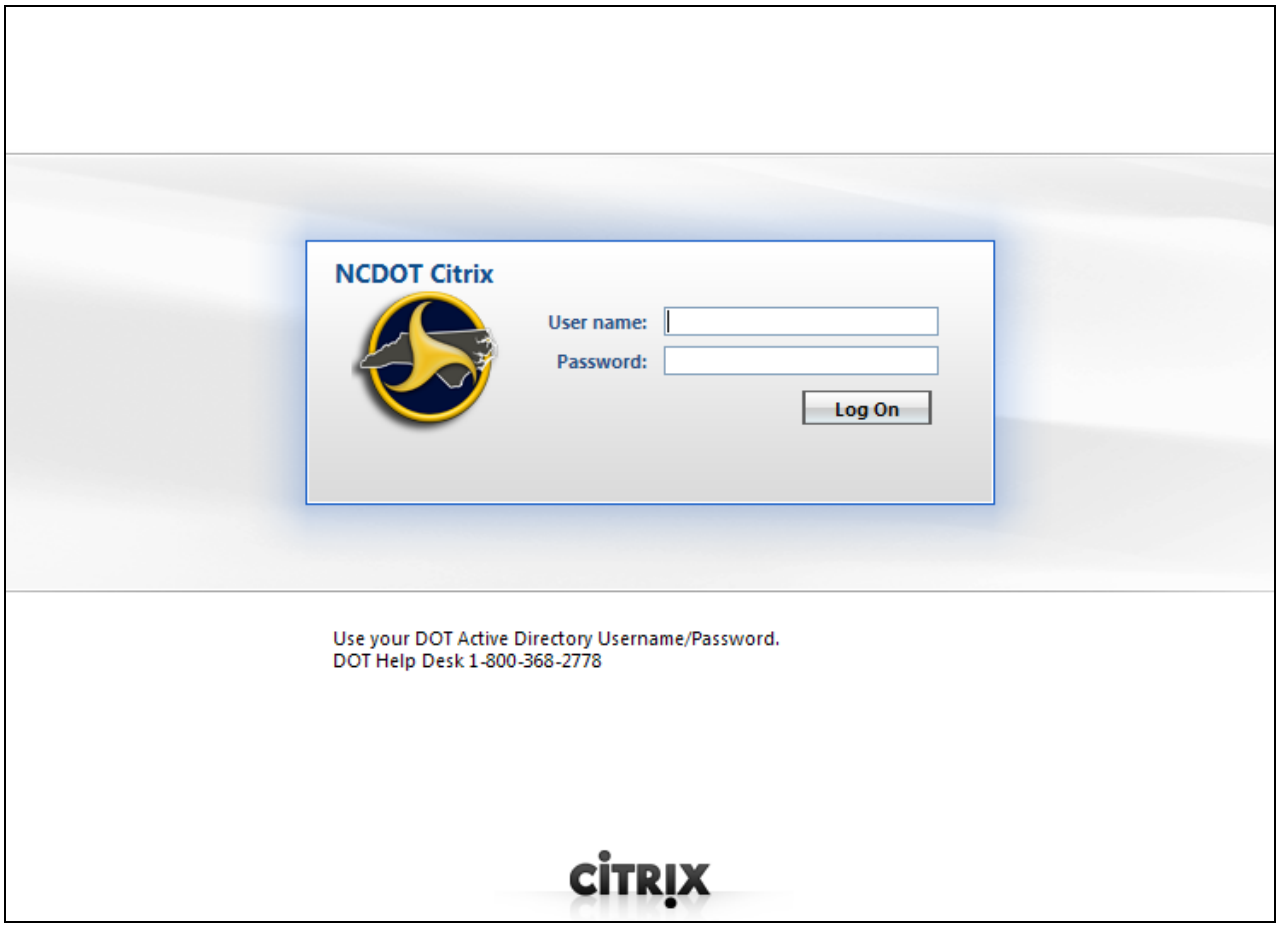
🗁**NOTE:** This will be the password you will use to log in the next time you access the application. Please make a note of it.

Chapter 2 Setting up a Project

Generating a Contract Number

Logging Into Citrix

Step	Action	Result
1	Open your web browser.	N/A
2	Type https://gateway.dot.state.nc.us in the address bar.	
3	Click the button or press Enter.	The **Citrix Login Page** will appear.



(*Citrix Login Page*)

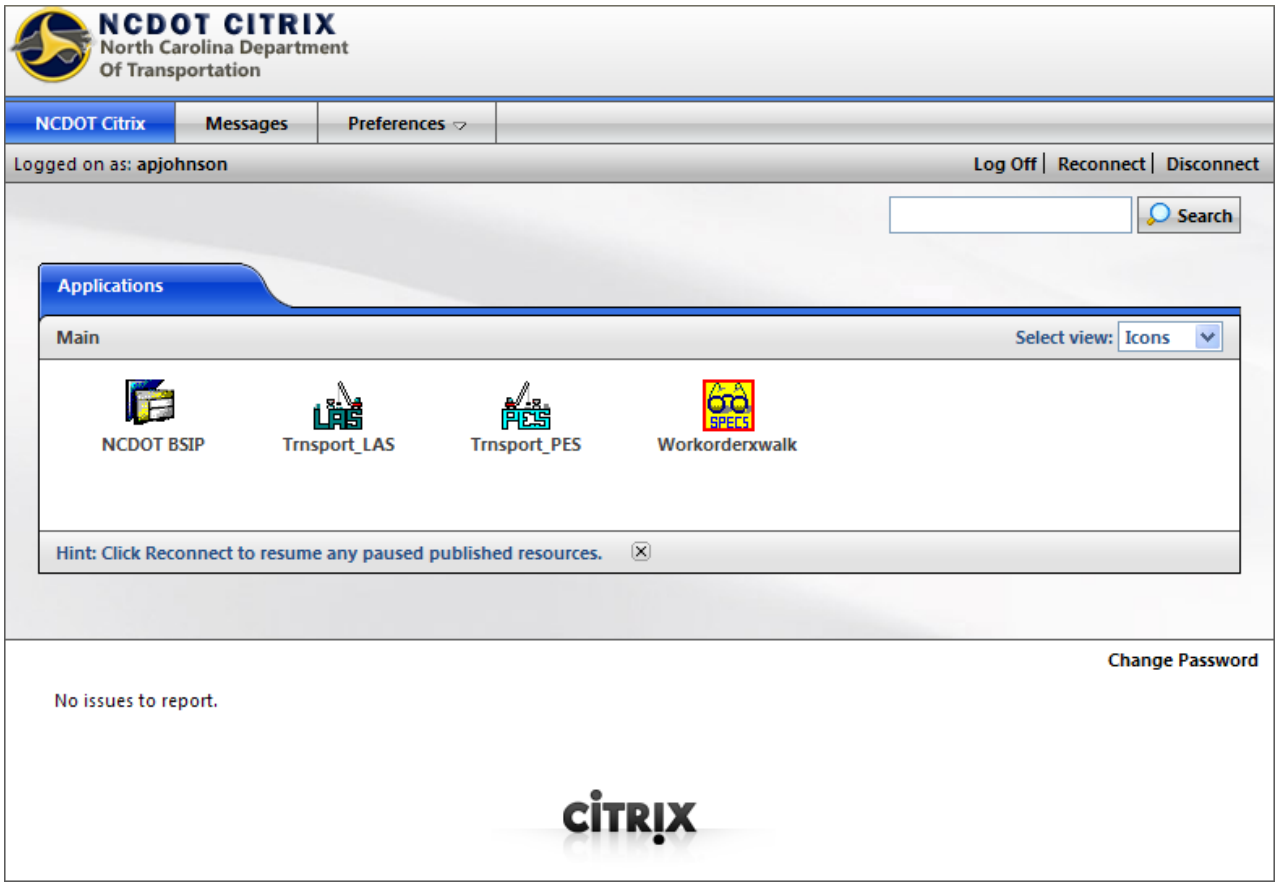
4	Type your **user name** in the **USER NAME** field.	N/A

Continued on Following Page

Generating a Contract Number

(continued)

5	Type your **password** in the **PASSWORD** field.	N/A
6	Click the **LOG ON** button.	The **Citrix Main Window** will appear.



(*Citrix Main Window*)

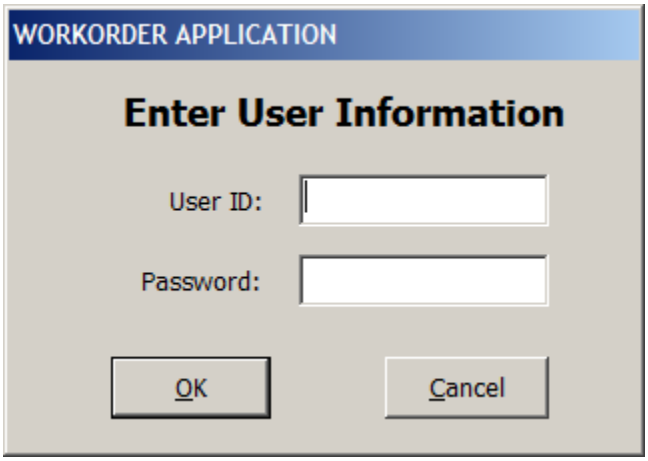
Logging Into the Workorder Application

7	Click the **WORKORDERXWALK** icon.	The **WORKORDER APPLICATION** dialog box will appear.

Continued on Following Page

Generating a Contract Number

(continued)



(*Workorder Application Dialog Box*)

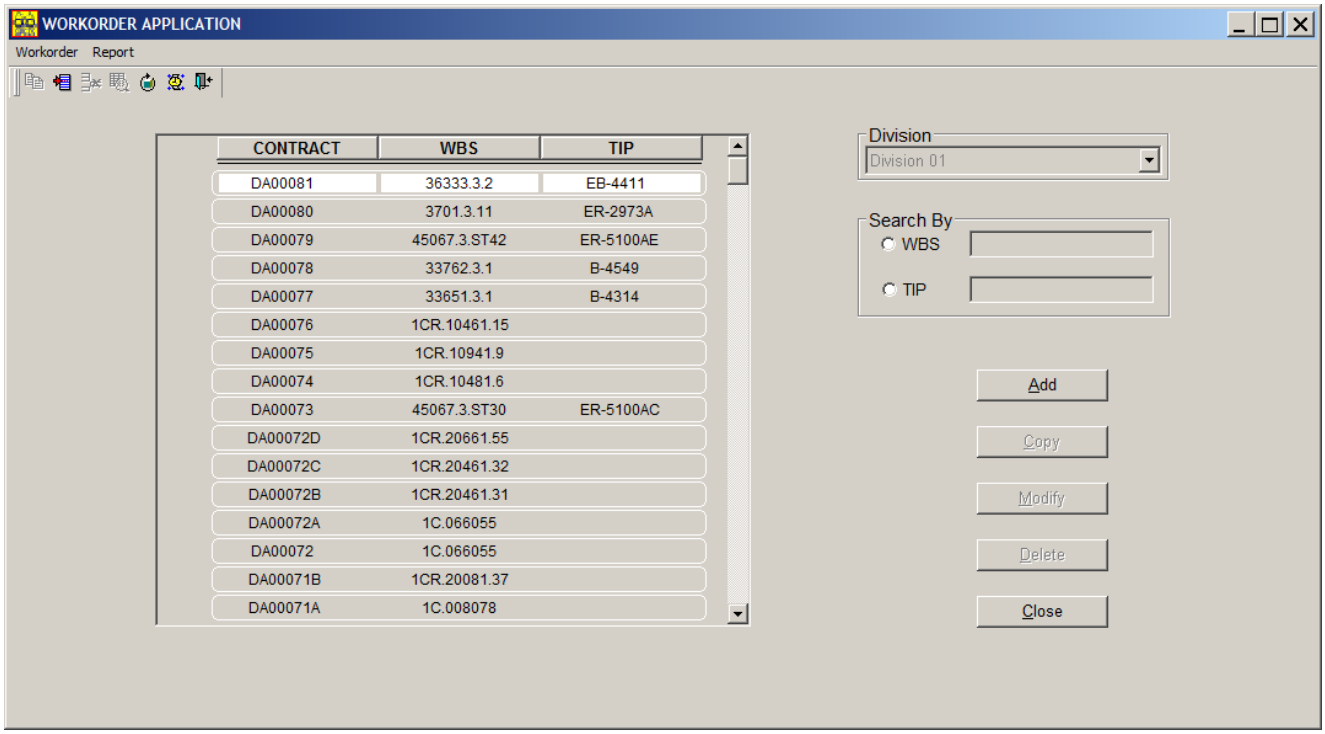
8	Type your ***User ID*** in the **USER ID** field.	N/A
9	Type your ***password*** in the **PASSWORD** field.	N/A
10	Click the **OK** button.	The **Workorder Application** window will appear.

🗁**NOTE:** If you are unable to log in, please contact the **NCDOT Help Desk** at **1-800-368-2778 (1-800-DOT-ASST)**.

Continued on Following Page

Generating a Contract Number

(continued)



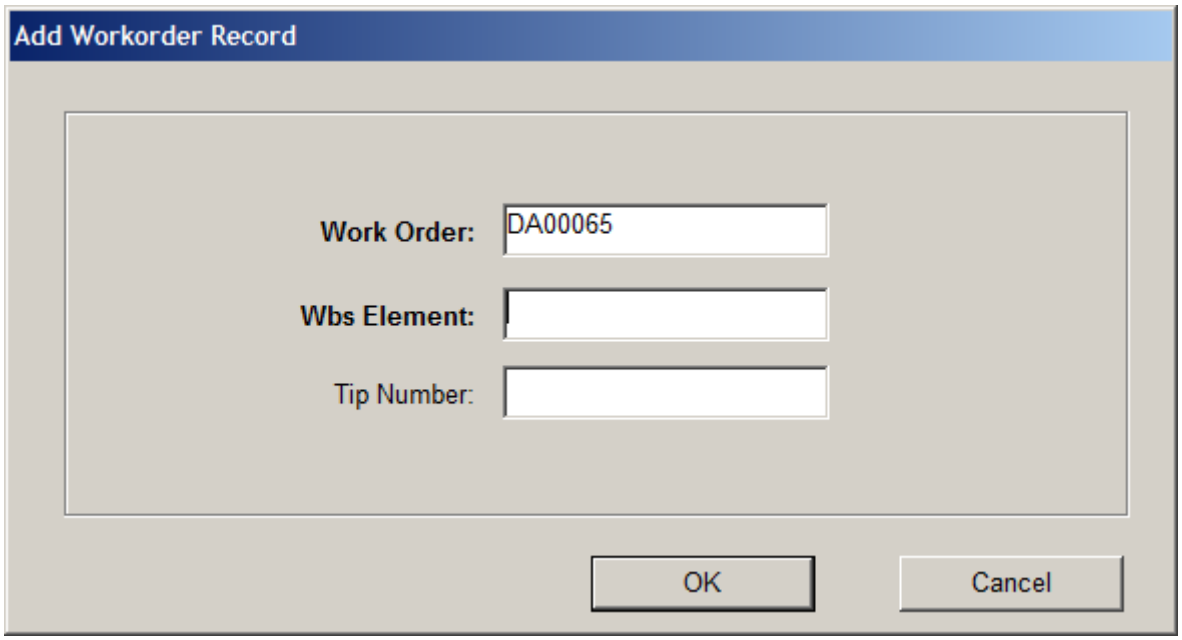
(*Workorder Application Window*)

11	Click the **ADD** button to add a contract record. **NOTE:** You can also click the **INSERT** button or select **INSERT** from the **WORKORDER** drop-down menu.	The **Add Workorder Record** dialog will appear.

Continued on Following Page

Generating a Contract Number

(continued)



(*Add Workorder Record Dialog*)

Contract Numbers will have the following format:

Central Office: C######
Division: D######

🗁**NOTE:** The ***Contract Number*** will default in the **CONTRACT** field. Depending on the number initially typed in, each additional number will increment by 1.

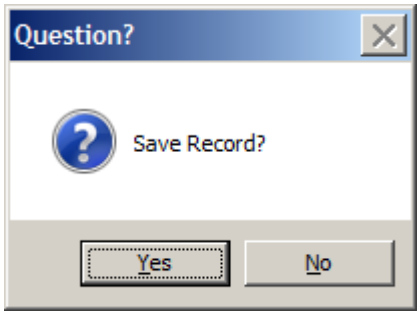
12	Type the ***WBS Number*** in the **WBS ELEMENT** field.	N/A
13	If applicable, type the ***TIP Number*** in the **TIP NUMBER** field.	N/A

Continued on Following Page

Generating a Contract Number

(continued)

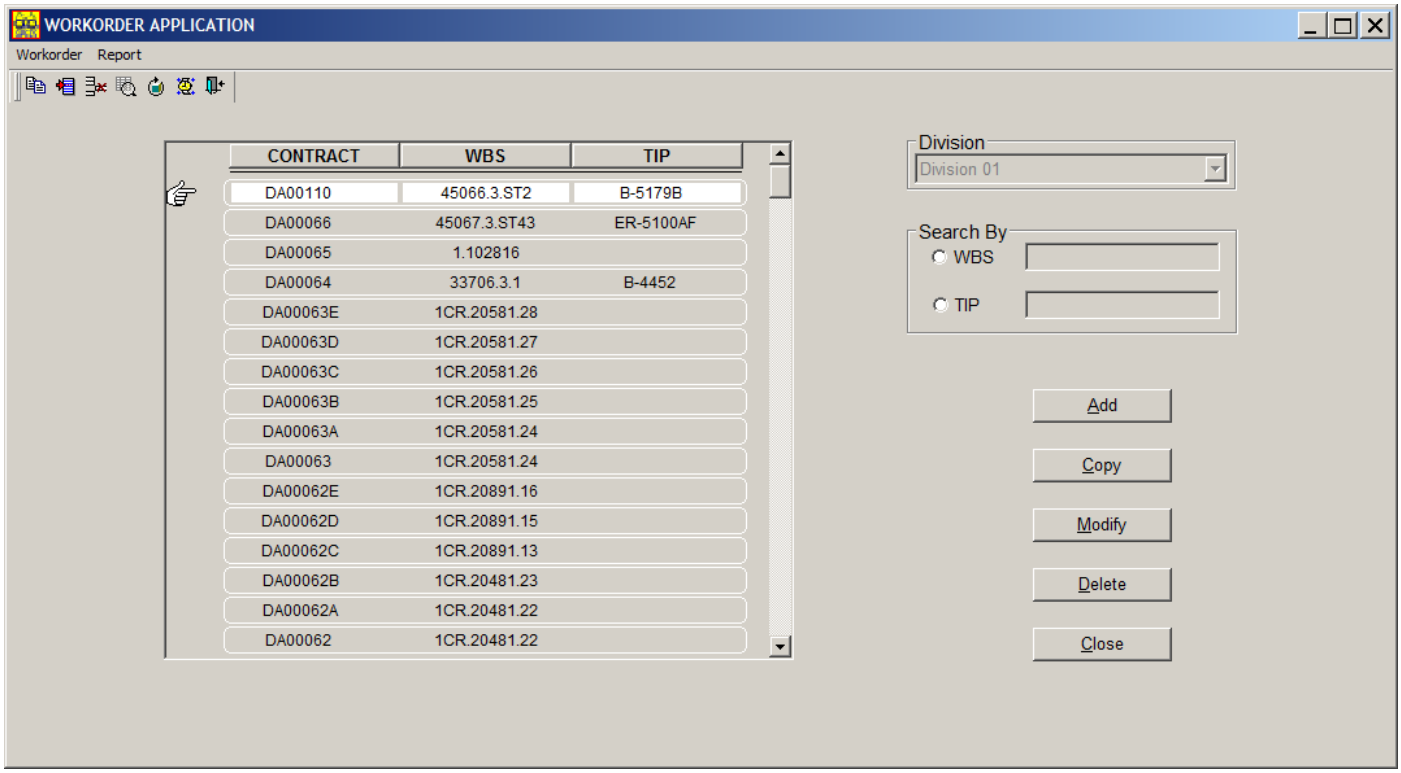
14	Click the **OK** button.	The following popup will appear.



15	Click the **YES** button.	The new record will appear at the top of the list.

Copying a Contract Record

From the **Workorder** application window:



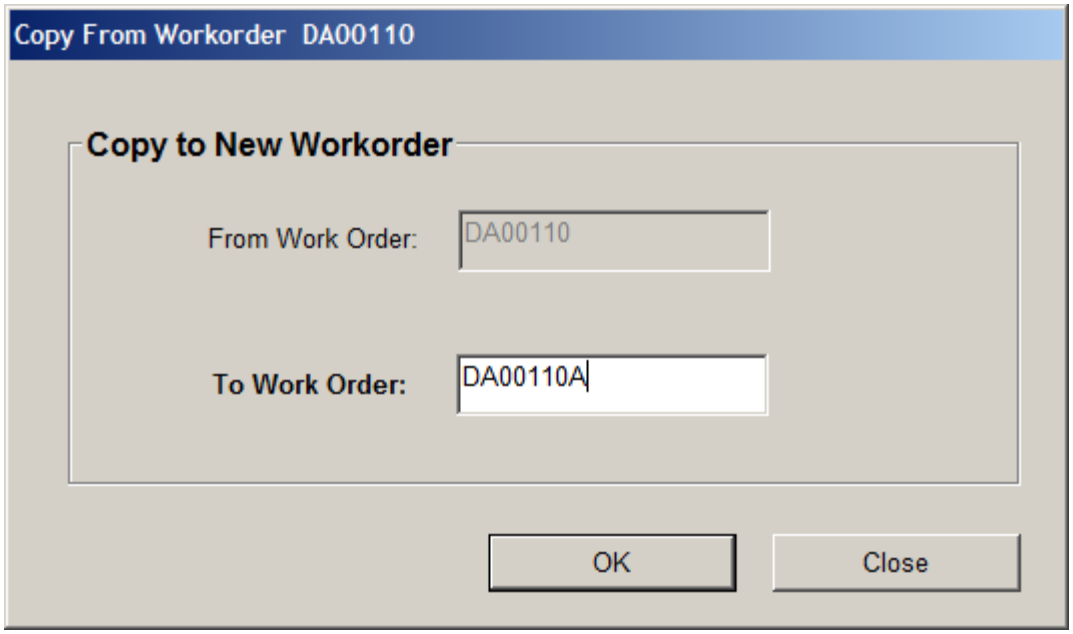
(*Workorder Application Window*)

Step	Action	Result
1	Click on the record you wish to copy and click the **COPY** button.	The **Copy From Workorder** dialog will appear.

Continued on Following Page

Copying a Contract Record

(continued)



(*Copy From Workorder Dialog*)

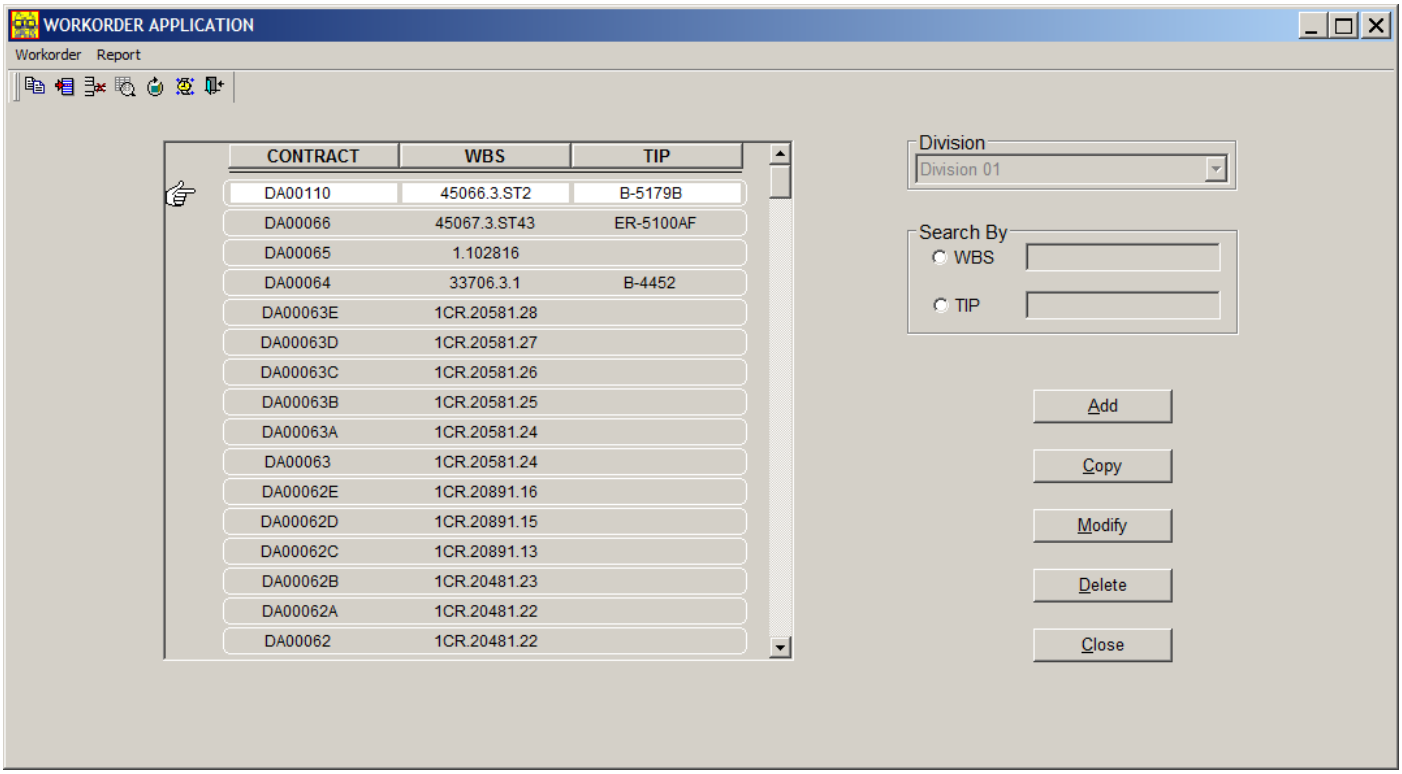
2	Type **the new work order number** in the **TO WORK ORDER** field.	N/A
3	Click the **OK** button.	The **Copy From Workorder** dialog will close and your changes will be saved.

🗁**NOTE:** At this point, you will want to edit the workorder record if you need to change the **WBS** and **TIP** numbers.

Editing a Contract Record

NOTE: You will not be able to edit the **Contract** number. You will only be able to edit the **WBS** and **TIP** numbers.

From the **Workorder** application window:



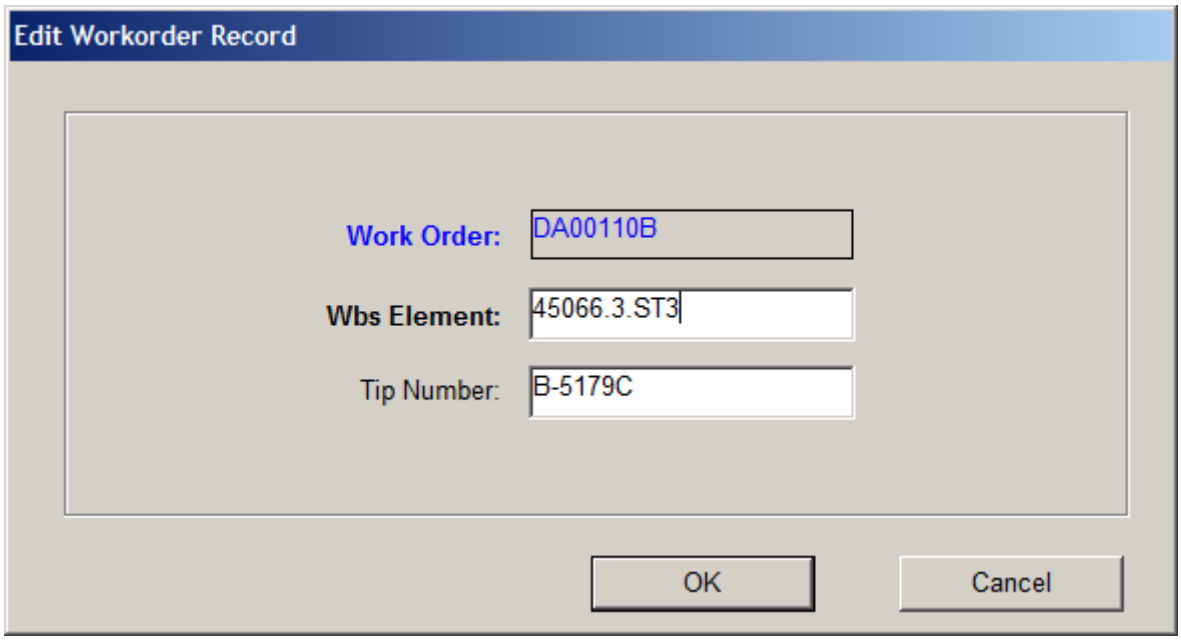
(*Workorder Application Window*)

Step	Action	Result
1	Double-click the record you wish to edit or Select the record you wish to edit and click the **MODIFY** button.	The **Edit Workorder Record** dialog will appear.

Continued on Following Page

Editing a Contract Record

(continued)

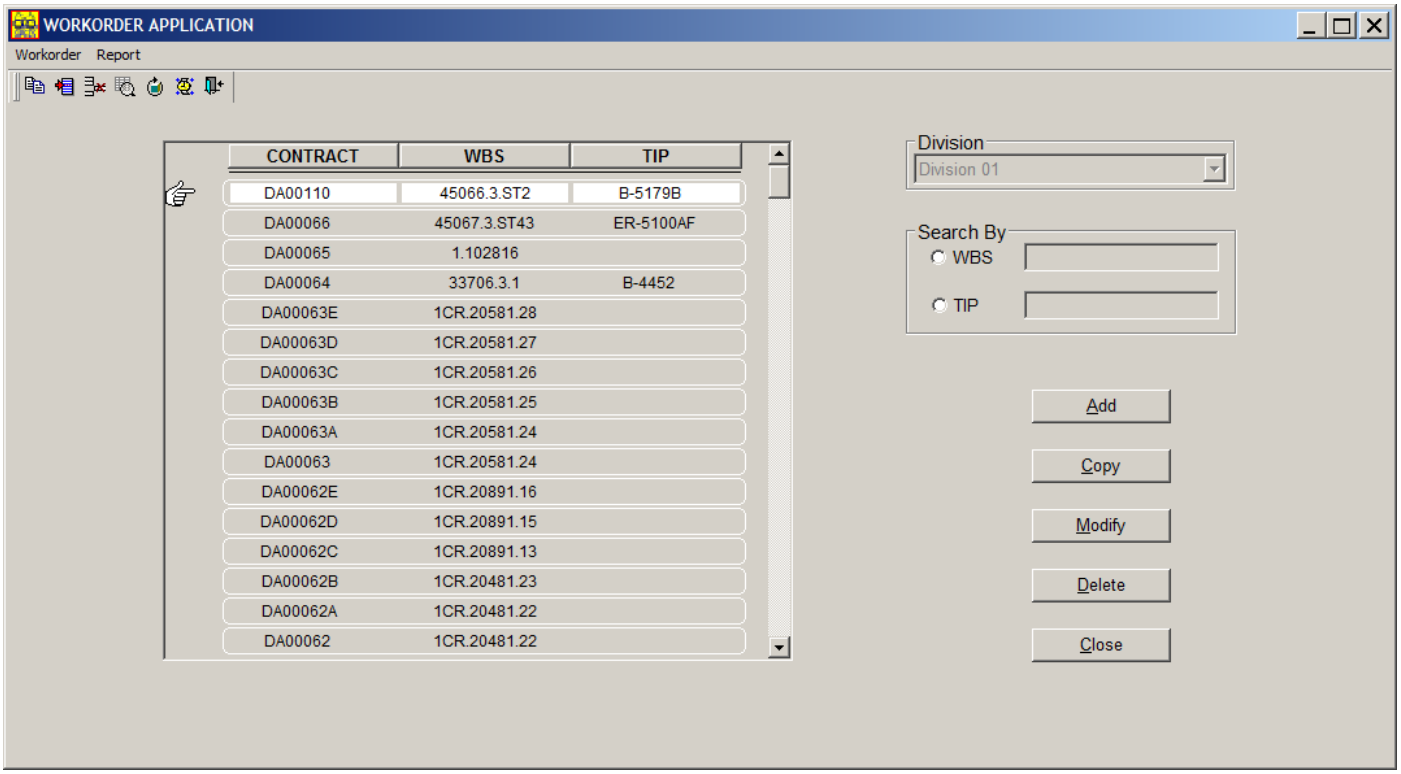


(*Edit Workorder Record Dialog*)

2	If applicable, edit the value in the **WBS ELEMENT** field.	N/A
3	If applicable, edit the value in the **TIP NUMBER** field.	N/A
4	Click the **OK** button.	The **Edit Workorder Record** dialog will close and your changes will be saved.

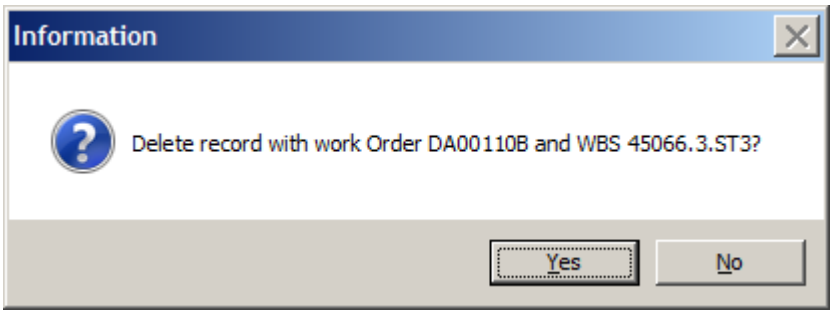
Deleting a Contract Record

From the **Workorder** application window:



(*Workorder Application Window*)

Step	Action	Result
1	Select the record you wish to delete and click the **DELETE** button.	The following dialog will appear.

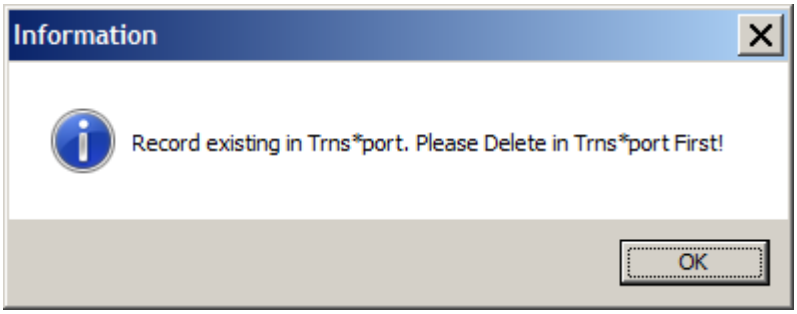


Continued on Following Page

Deleting a Contract Record

(continued)

If the Contract record you are attempting to delete has been associated with a project in Trns•port PES, you will receive the following message.

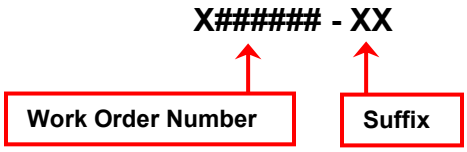


If you receive this message, you will need to go into the Trns•port applications and remove the records associated with this Contract number before you will be able to proceed with the deletion.

2	Click the **YES** button.	The selected Contract will be deleted.

Creating a Project Estimate Template

The estimator is responsible for setting up projects for each section of the proposal. The projects will have the following naming convention:



Contract Numbers have the following format:

Central Office: **C######**
Division: **D######**

The **Suffix** identifies the section of the project:

ST Structure projects
RW Roadway projects

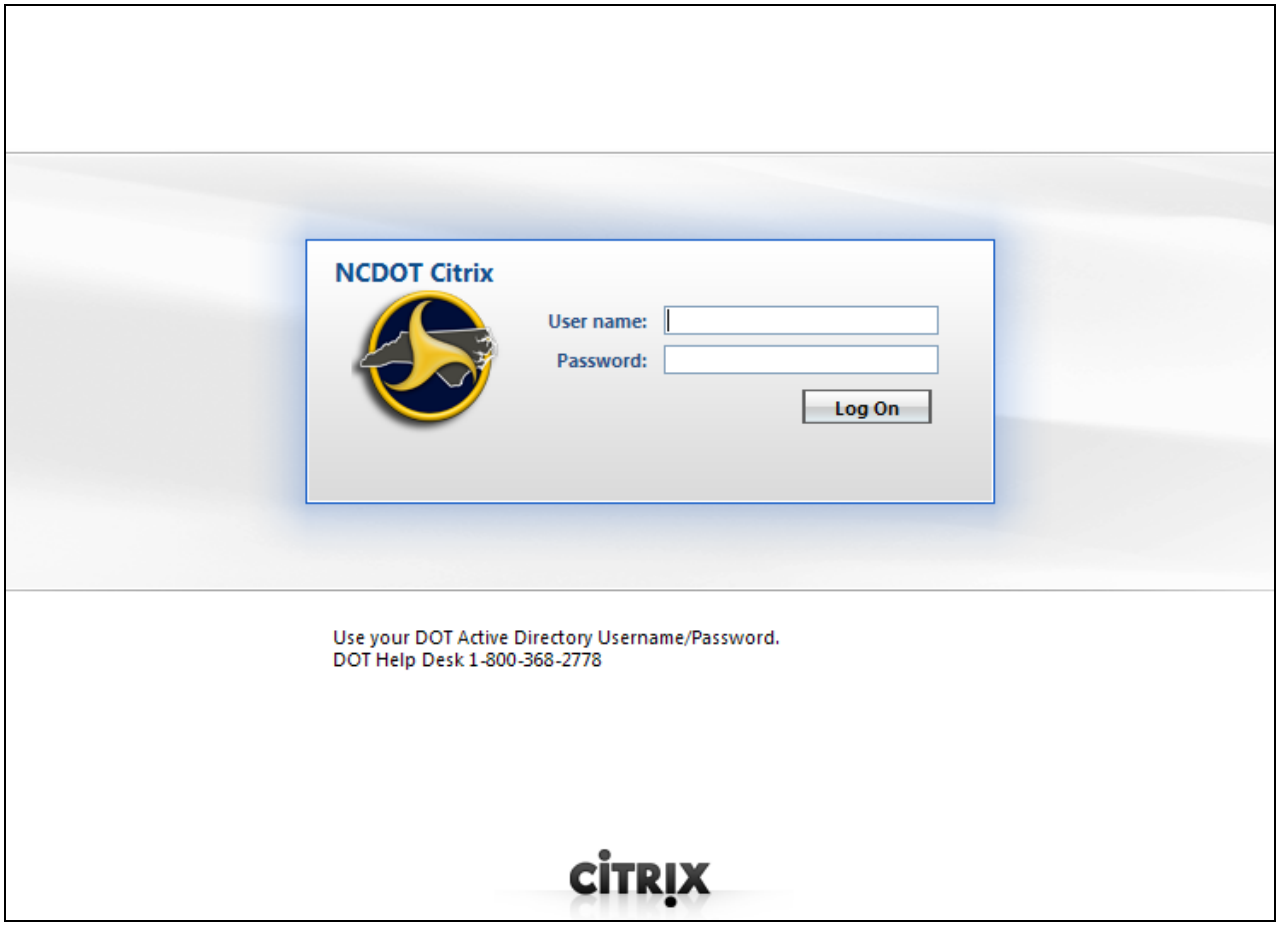
Logging Into Citrix

Step	Action	Result
1	Open your web browser.	N/A
2	Type https://gateway.dot.state.nc.us in the address bar.	
3	Click the button or press Enter.	The **Citrix Login Page** will appear.

Continued on Following Page

Creating a Project Estimate Template

(continued)



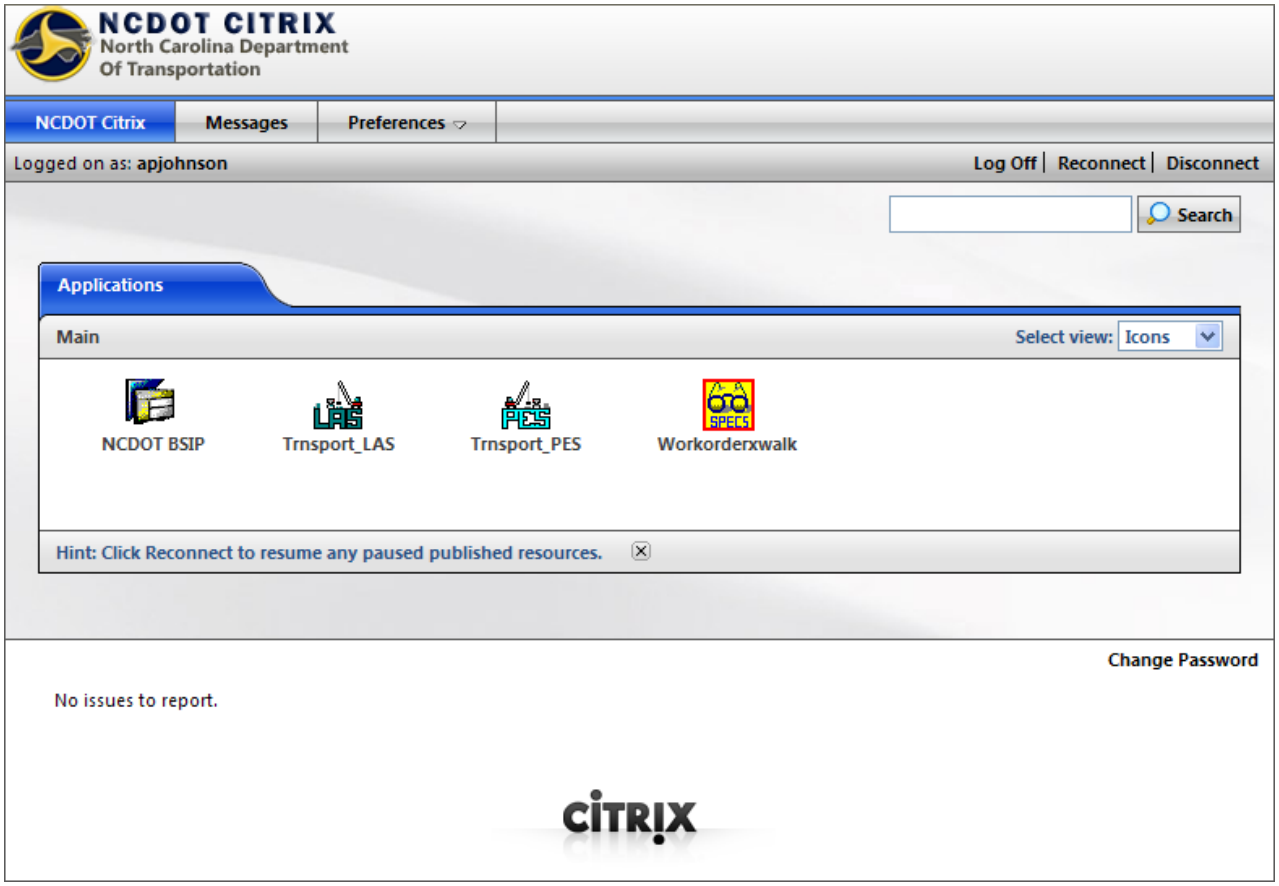
(*Citrix Login Page*)

4	Type your **user name** in the **USER NAME** field.	N/A
5	Type your **password** in the **PASSWORD** field.	N/A
6	Click the **LOG ON** button.	The **Citrix Main Window** will appear.

Continued on Following Page

Creating a Project Estimate Template

(continued)



(*Citrix Main Window*)

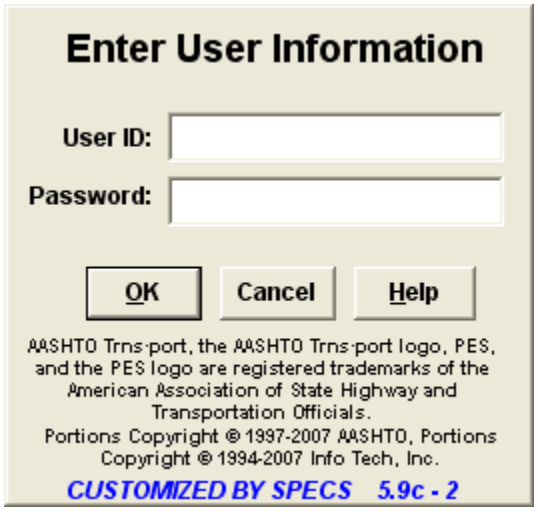
Logging Into the Trns•port PES Application

7	Click the **TRNSPORT_PES** icon. Trnsport_PES	The **Trns•port PES Logon** dialog box will appear.

Continued on Following Page

Creating a Project Estimate Template

(continued)



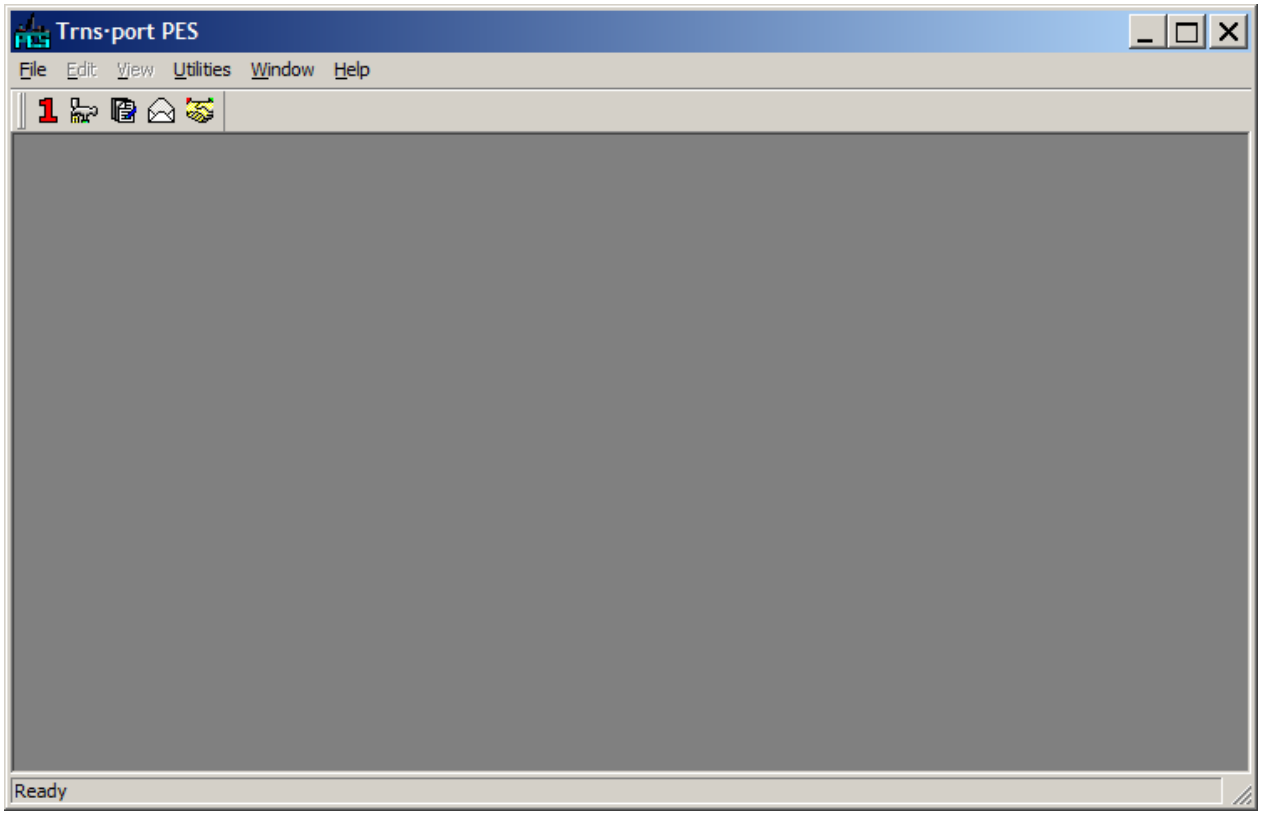
(*Trns•port PES Logon Dialog Box*)

8	Type your ***User ID*** in the **USER ID** field.	N/A
9	Type your ***password*** in the **PASSWORD** field.	N/A
10	Click the **OK** button.	The **Trns•port Proposal and Estimates System** main window will appear.

Continued on Following Page

Creating a Project Estimate Template

(continued)



(*Trns•port Proposal and Estimates System Main Window*)

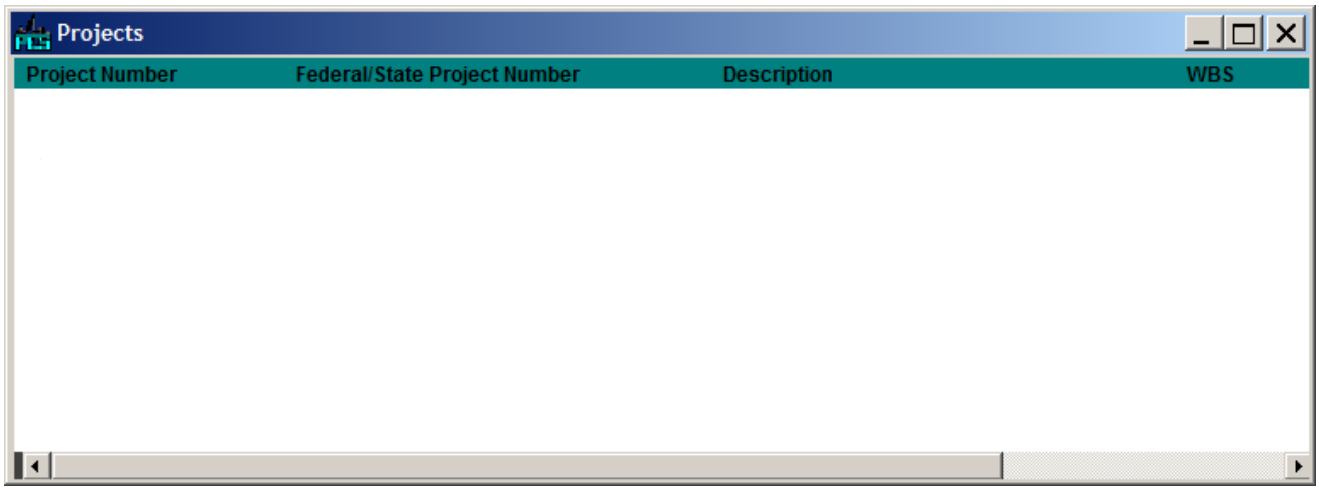
Adding a Project

11	Click the **PROJECTS** button.	The **Projects** window will appear.

Continued on Following Page

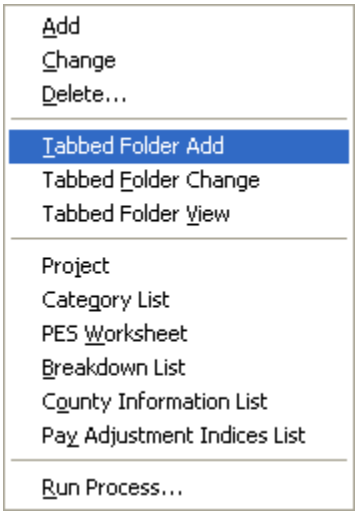
Creating a Project Estimate Template

(continued)



(*Projects Window*)

12	Right-click anywhere on the **Projects** window.	A right-click menu will appear.

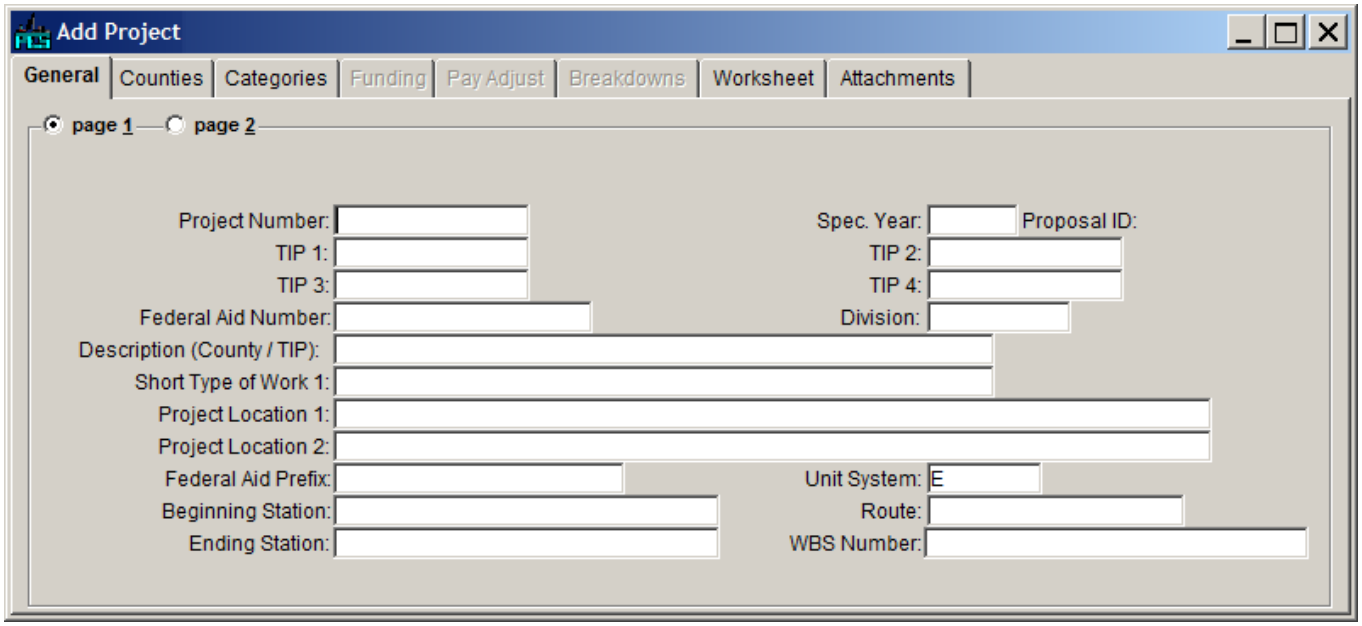


13	Select **TABBED FOLDER ADD** from the menu.	The **Add Project** window will appear.

Continued on Following Page

Creating a Project Estimate Template

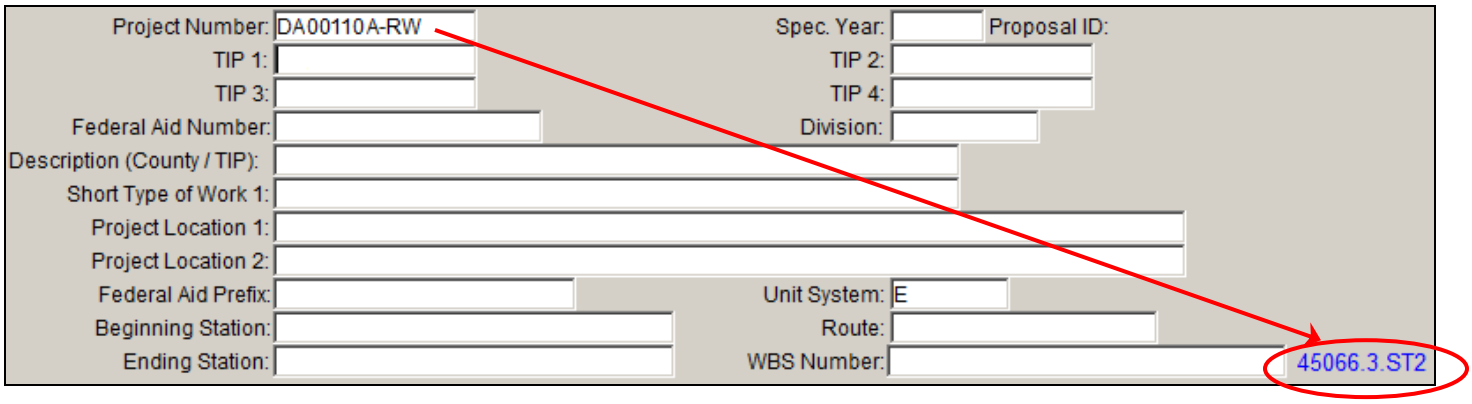
(continued)



(*Add Project Window – General Tab Page 1*)

General Tab

14	Type the **project number** in the **PROJECT NUMBER** field. 🗁**NOTE:** Attach the following suffix if applicable: -**ST** (for Structure projects) -**RW** (for Roadway projects)	As soon as you leave this field, the associated WBS number will appear in **blue** beside the **WBS NUMBER** field.



Continued on Following Page

Creating a Project Estimate Template

(continued)

15	Select the **specification year** from the drop-down list in the **SPEC. YEAR** field.	N/A
16	If applicable, type the **TIP number** in the **TIP 1** field. 🗁**NOTE:** If there are multiple TIP numbers associated with the project, type them into the additional **TIP** fields.	N/A
17	Type the **federal aid number** in the **FEDERAL AID NUMBER** field. 🗁**NOTE:** If the project is state-funded, type **STATE FUNDED** in this field.	N/A
18	Select the **division number** from the drop-down list in the **DIVISION** field.	N/A
19	Type the **county name and TIP number** in the **DESCRIPTION** field.	N/A
20	Type a **brief description** in the **SHORT TYPE OF WORK 1** field.	N/A
21	Type the **project location** in the **PROJECT LOCATION 1** field. 🗁**NOTE:** If this is more characters than the field will accommodate, use Project Location2 for the remainder.	N/A
22	Select the **federal aid prefix** from the drop-down list in the **FEDERAL AID PREFIX** field.	N/A

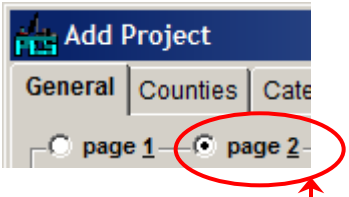
🗁**NOTE:** You will not need to type any values in the **BEGINNING STATION** and **ENDING STATION** fields.

Continued on Following Page

Creating a Project Estimate Template

(continued)

23	Select **English, Metric** or **Neutral** from the drop-down list in the **UNIT SYSTEM** field.	N/A
24	Type the **route number** in the **ROUTE** field.	N/A
25	Type the **WBS number** (that appears in blue) in the **WBS NUMBER** field.	N/A

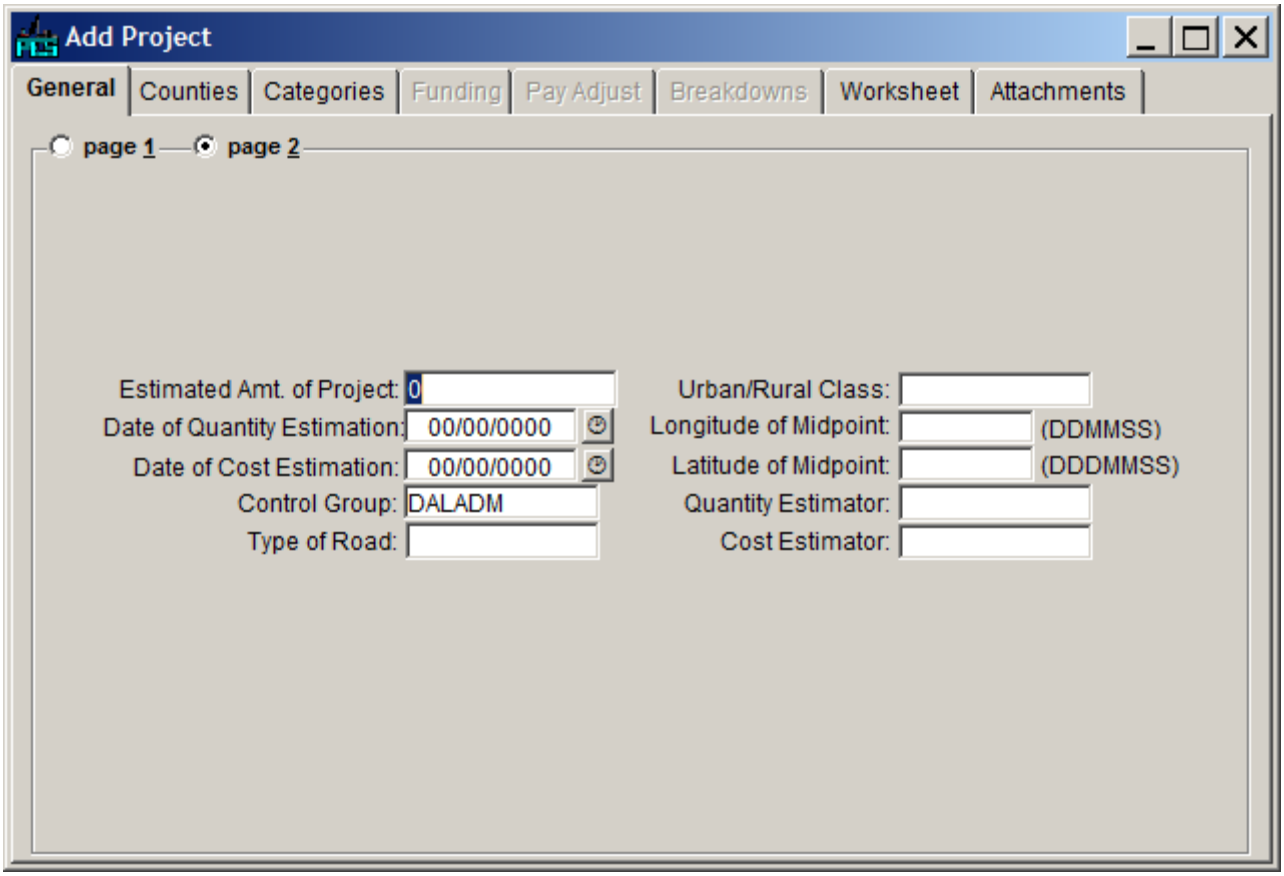


26	Click the **PAGE 2** radio button.	**Page 2** of the **General** tab will appear.

Continued on Following Page

Creating a Project Estimate Template

(continued)



(*Add Project Window – General Tab Page 2*)

🗁**NOTE:** Leave the **ESTIMATED AMOUNT OF PROJECT** field blank.

Continued on Following Page

Creating a Project Estimate Template

(continued)

27	Type **the date the estimate was taken** in the **DATE OF QUANTITY ESTIMATION** field. 🗁**NOTE:** If you click the button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
28	Select your **control group** from the drop-down list in the **CONTROL GROUP** field.	N/A
29	Select the **type of road** from the drop-down list in the **TYPE OF ROAD** field.	N/A
30	Select **Urban, Rural** or **[none]** from the drop-down list in the **URBAN/RURAL CLASS** field.	N/A
31	Type the **name of the quantity estimator** in the **QUANTITY ESTIMATOR** field.	N/A
32	Click the **SAVE FOLDER** button.	The information on the **General** tab will be saved

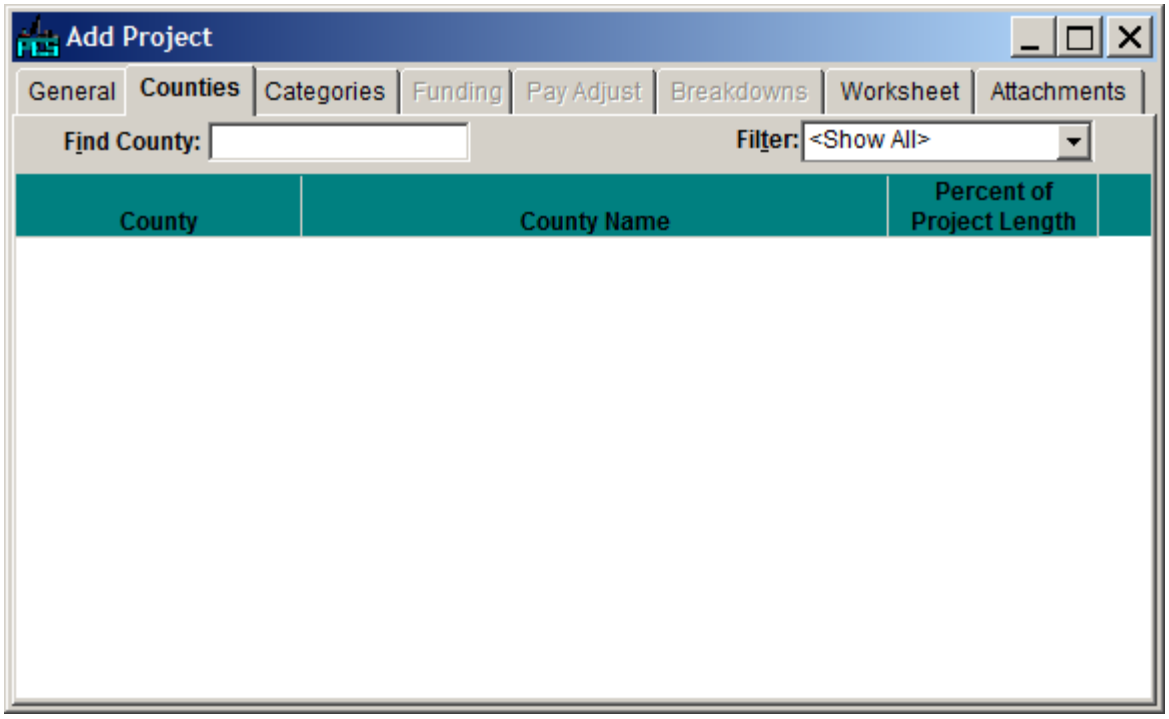
Continued on Following Page

Creating a Project Estimate Template

(continued)

Counties Tab

33	Click the **COUNTIES** tab.	The **Counties** tab will be brought forward.



(*Add Project Window – Counties Tab*)

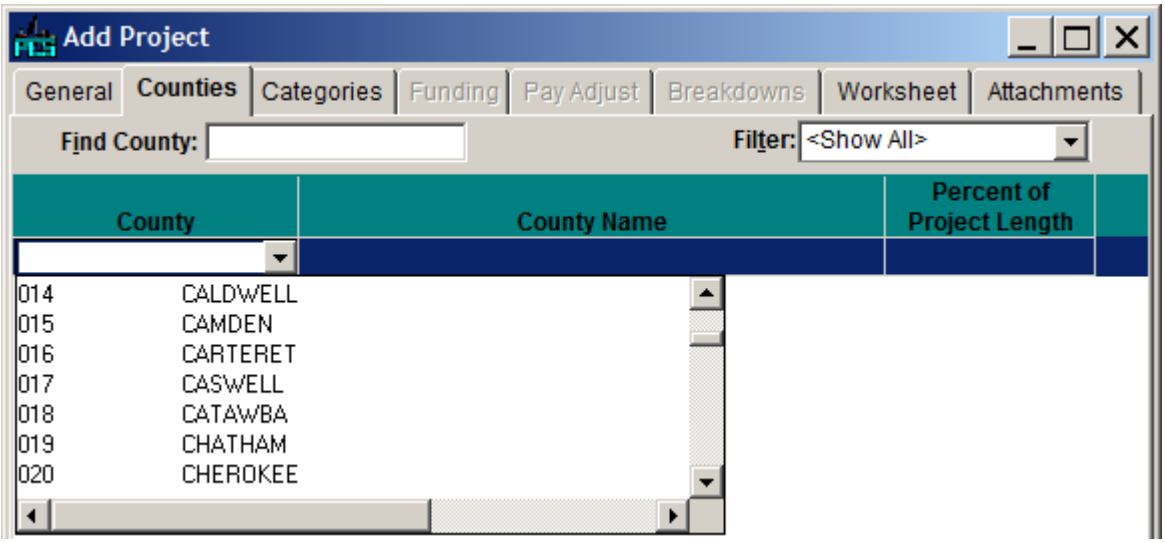
34	Right-click anywhere on the **Counties** tab.	A right-click menu will appear.

35	Select **ADD** from the menu.	A blank line will appear highlighted.

Continued on Following Page

Creating a Project Estimate Template

(continued)



36	Click the drop-down box in the **COUNTY** field.	A list of counties will appear.
37	Select a **county** in which work on the project will be performed from the list.	The **county name** will appear in the **COUNTY NAME** field.
38	Type the **percentage of the project that will be executed in the selected county** in the **PERCENT OF PROJECT LENGTH** field.	N/A

Repeat steps **34 - 38** for each county in which the project will be executed.

39	Click the **SAVE FOLDER** button.	The information on the **Counties** tab will be saved

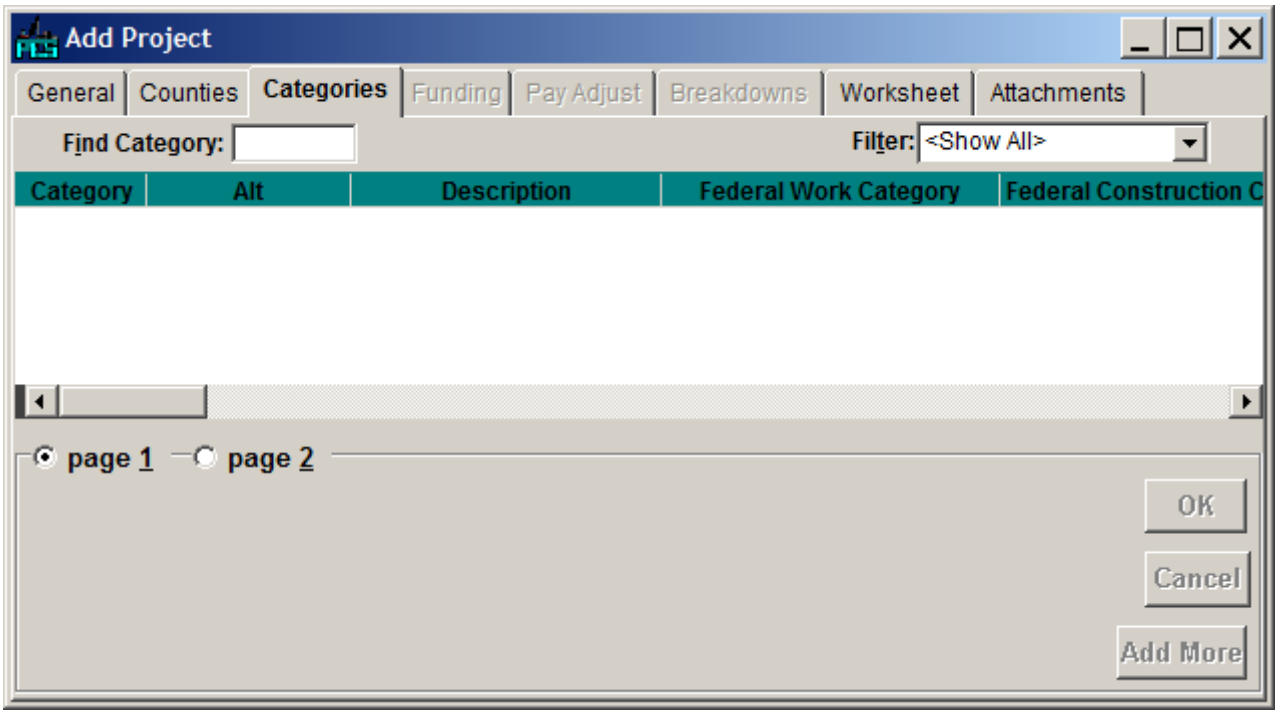
Continued on Following Page

Creating a Project Estimate Template

(continued)

Categories Tab

40	Click the **CATEGORIES** tab.	The **Categories** tab will be brought forward.



(*Add Project Window – Categories Tab*)

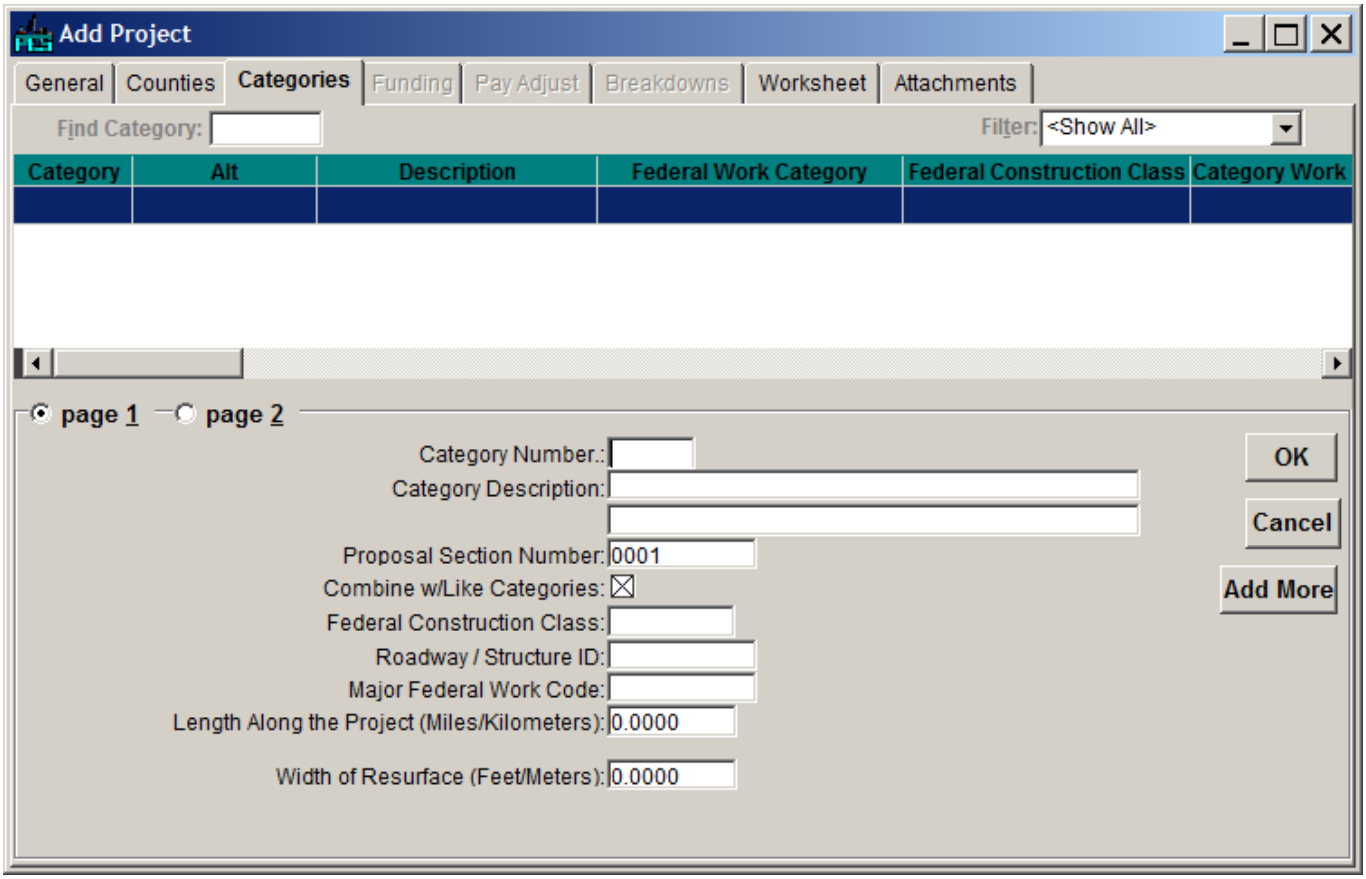
41	Right-click in the white space on the **Categories** tab.	A right-click menu will appear.

Continued on Following Page

Creating a Project Estimate Template

(continued)

42	Select **ADD** from the menu.	A blank line will appear highlighted and data entry fields will appear below.



(*Add Project Window – Categories Tab – New Record*)

Continued on Following Page

Creating a Project Estimate Template

(continued)

Creating the System Required Category

43	Type **0000** in the **CATEGORY NUMBER** field.	N/A
44	Type **SYSTEM REQUIRED CATEGORY** in the **CATEGORY DESCRIPTION** field.	N/A
45	Select **0010** from the drop-down list in the **PROPOSAL SECTION NUMBER** field.	N/A

🗁**NOTE:** Leave the **COMBINE W/LIKE CATEGORIES** check box checked.

46	Select **0000** from the drop-down list in the **FEDERAL CONSTRUCTION CLASS** field.	N/A
47	Select **0000** from the drop-down list in the **ROADWAY/STRUCTURE ID** field.	N/A

Adding a Roadway Category

48	Click the [Add More] button. 🗁**NOTE:** If you have already clicked the [OK] button, you will not be able to click the [Add More] button. If this happens, right-click and select **ADD** from the right-click menu to add additional records.	N/A
49	Type **0001** in the **CATEGORY NUMBER** field.	N/A
50	Type **ROADWAY ITEMS** in the **CATEGORY DESCRIPTION** field.	N/A
51	Select **0001** from the drop-down list in the **PROPOSAL SECTION NUMBER** field.	N/A

Continued on Following Page

Creating a Project Estimate Template

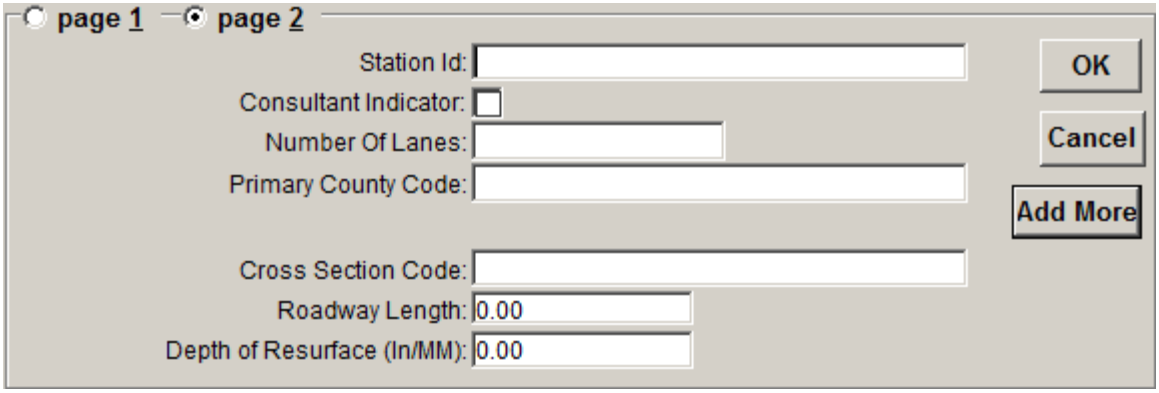
(continued)

🗁**NOTE:** Leave the **COMBINE W/LIKE CATEGORIES** check box checked.

52	Select **RW** from the drop-down list in the **FEDERAL CONSTRUCTION CLASS** field.	N/A
53	Select **RW1** from the drop-down list in the **ROADWAY/STRUCTURE ID** field.	N/A

🗁**NOTE:** The **MAJOR FEDERAL WORK CODE** field is used only for federally-funded projects.

54	Type the **roadway length in miles or km (not including length of structure)** in the **LENGTH ALONG THE PROJECT (MILE/KILOMETERS)** field.	N/A
55	Click the **PAGE 2** radio button.	**Page 2** of the **Categories** tab will appear.



56	Enter all information that you have available that is requested on this window.
57	If you wish to add additional categories, click the **Add More** button and add the applicable information. If you are finished adding categories, click the **OK** button.

Continued on Following Page

Creating a Project Estimate Template

(continued)

58	Click the **SAVE FOLDER** button.	The information on the **Categories** tab will be saved.

NOTE: If any mandatory fields are left blank, an error message will appear indicating which fields must be populated.

Categories for Non-Participating Items

If you have non-participating items, you must create additional categories for each municipality/utility company/developer/railroad/etc. To create additional categories, repeat steps 42-52, substituting information as needed:

- Type **ROADWAY ITEMS – NPAR (NAME)** in the **DESCRIPTION** field.
- Select **NPAR** from the drop-down list in the **MAJOR FEDERAL WORK CLASS** field.
- Leave the **LENGTH ALONG THE PROJECT** field blank.

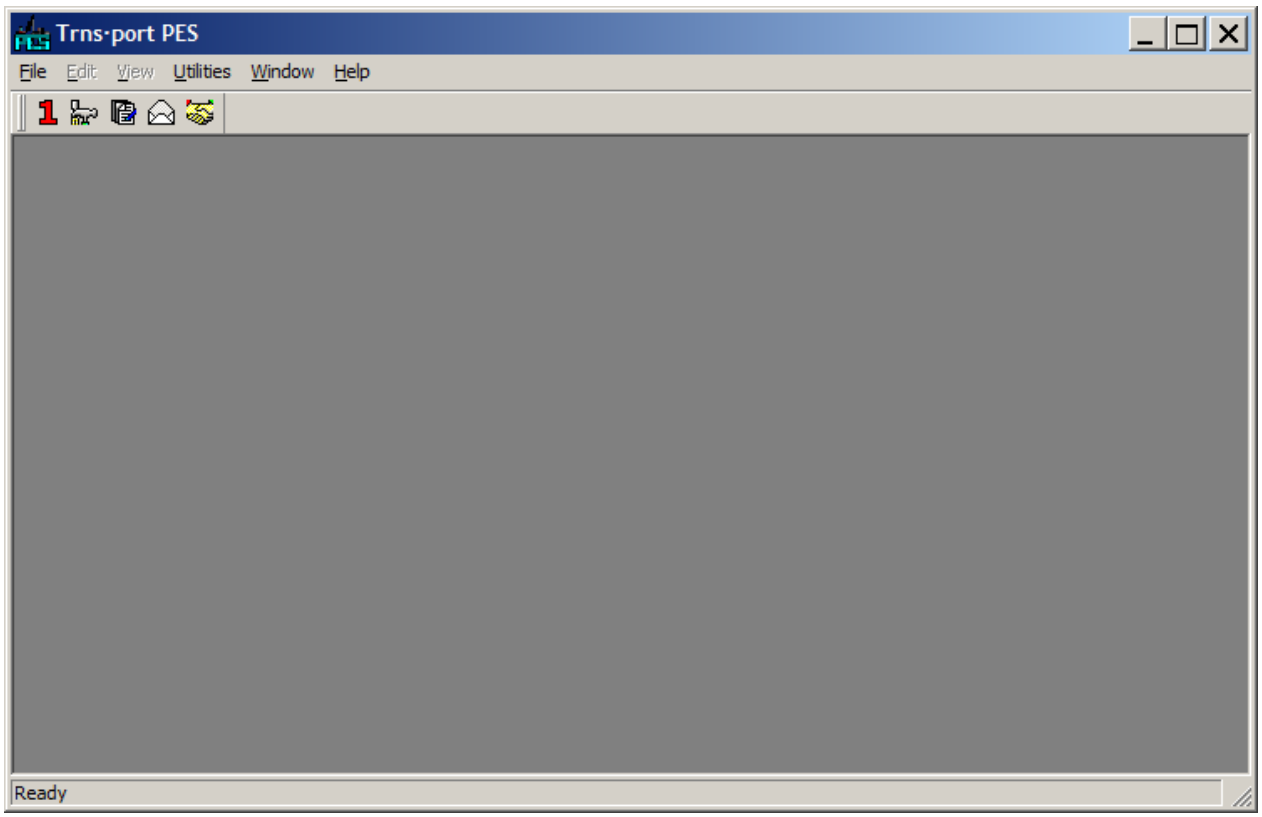
NOTE: You don't need to enter any information on the **Funding, Pay Adjust** and **Breakdowns** tabs. The required information will default automatically after you set up the associated projects.

Copying a Project

When you have created one project (Roadway) for a proposal you will be able to copy the project and change the applicable information for the other sections (Structure/etc.).

You will also be able to copy any project if you are creating one that is similar in the future.

Once you have successfully logged into **Trns•port PES**:



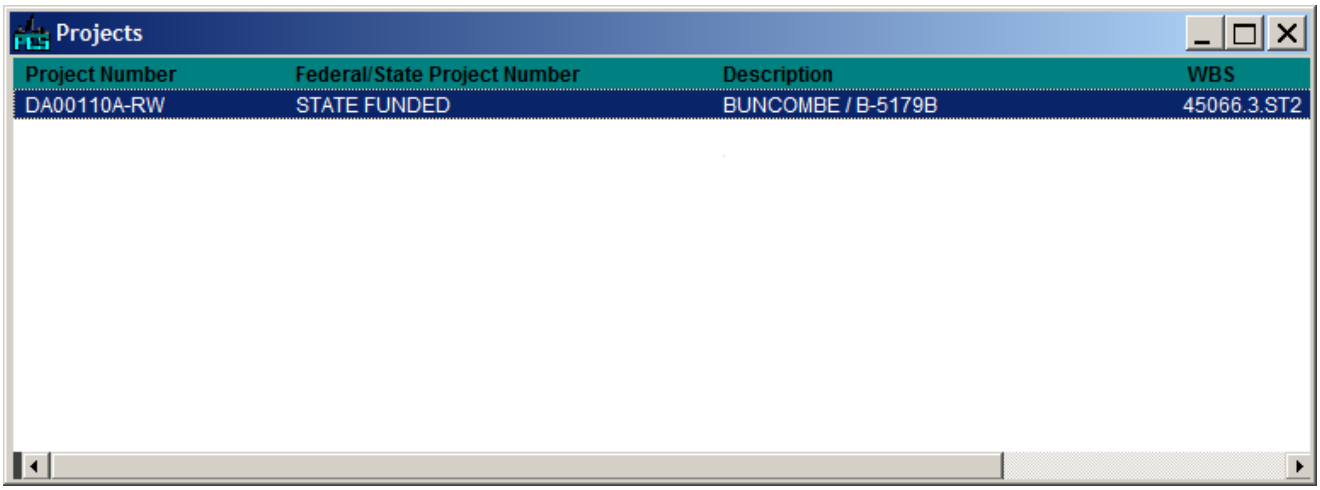
(*Trns•port Proposal and Estimates System Main Window*)

Step	Action	Result
1	Click the **PROJECTS** button.	The **Projects** window will appear

Continued on Following Page

Copying a Project

(continued)



(*Projects Window*)

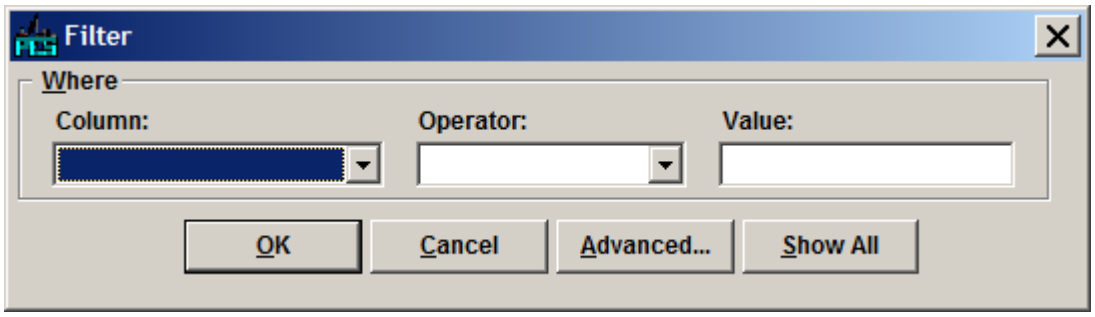
Finding the Project Estimate Template

2	To find the project estimate template, click the **FILTER** button.	The **Filter** dialog will appear.

Continued on Following Page

Copying a Project

(continued)



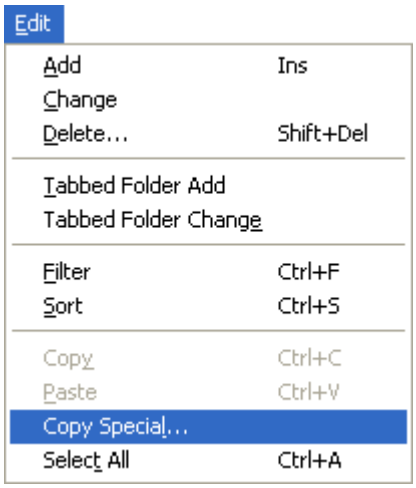
(*Filter Dialog*)

3	Select the **column you wish to search** from the drop-down list in the **COLUMN** field	N/A
4	Select **Contains** from the drop-down list in the **OPERATOR** field.	N/A
5	Type **the search criteria** in the **VALUE** field. 🗁**NOTE:** Make sure this is in ALL CAPS. PES is case sensitive.	N/A
6	Click the **OK** button.	Every record containing the search criteria will appear.
7	Find the **project estimate template** you wish to copy and click on it to select it.	N/A

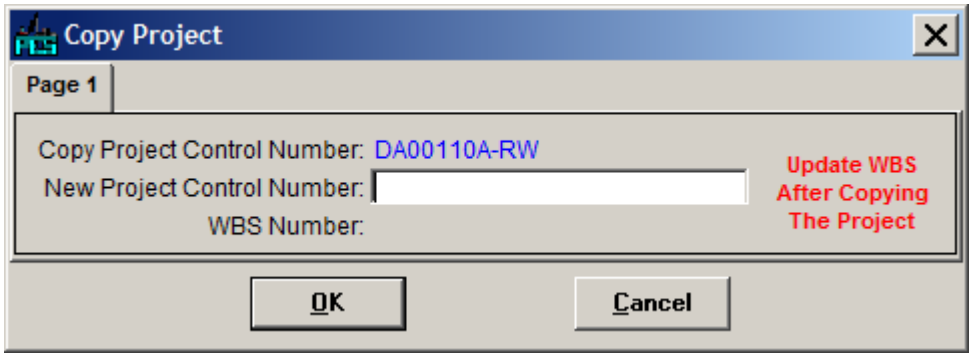
Continued on Following Page

Copying a Project

(continued)



8	From the **EDIT** drop-down menu, select **COPY SPECIAL**.	The **Copy Project** dialog will appear.



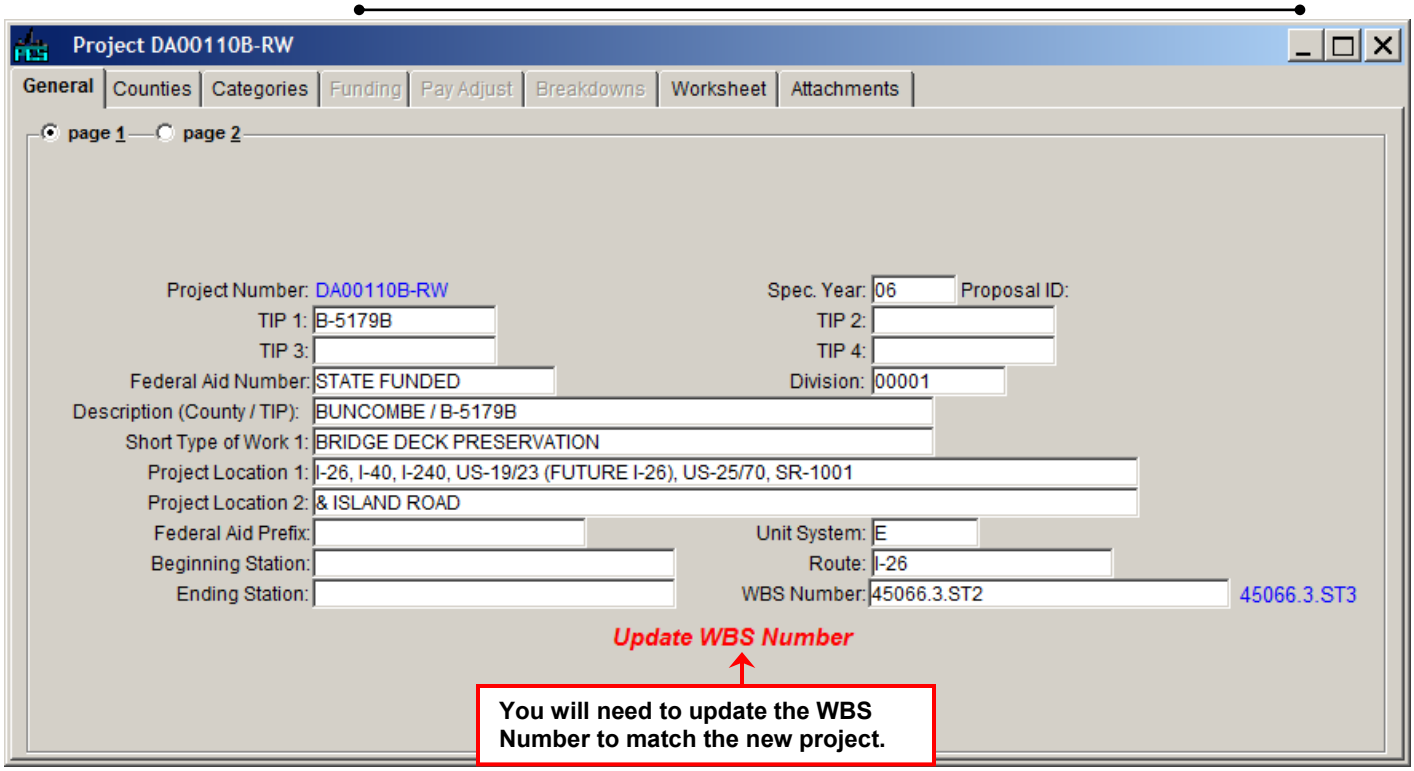
(*Copy Project Dialog*)

9	Type the **new project number** in the **NEW PROJECT CONTROL NUMBER** field.	N/A
10	Click the **OK** button.	The new project will appear on the **General** tab.

Continued on Following Page

Copying a Project

(continued)

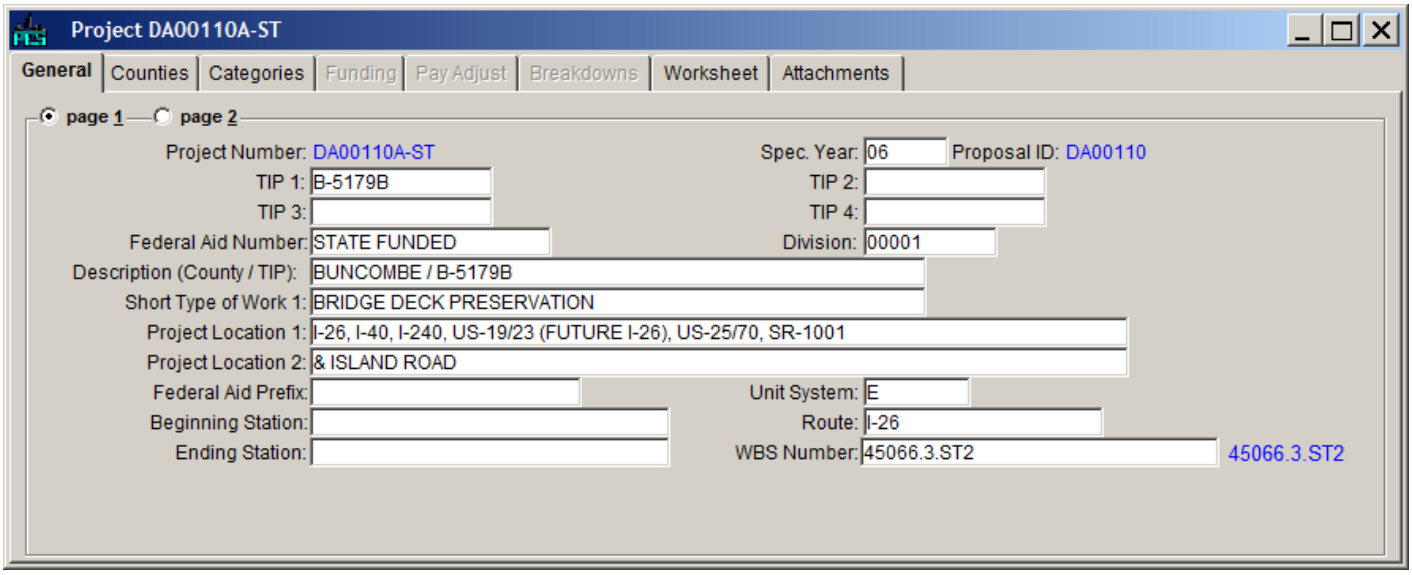


(*Copied Project*)

11	Edit the existing fields on the **General** tab (Pages 1 & 2) to match the information contained in the new (copied to) project.	N/A
12	Click the **SAVE FOLDER** button.	Your changes will be saved.

Customizing a Copied Project

When you have copied the project template and changed the suffix to reflect the proposal section, you will need to go into the project and change the applicable information on the **Categories** tab.



(*Copied Project*)

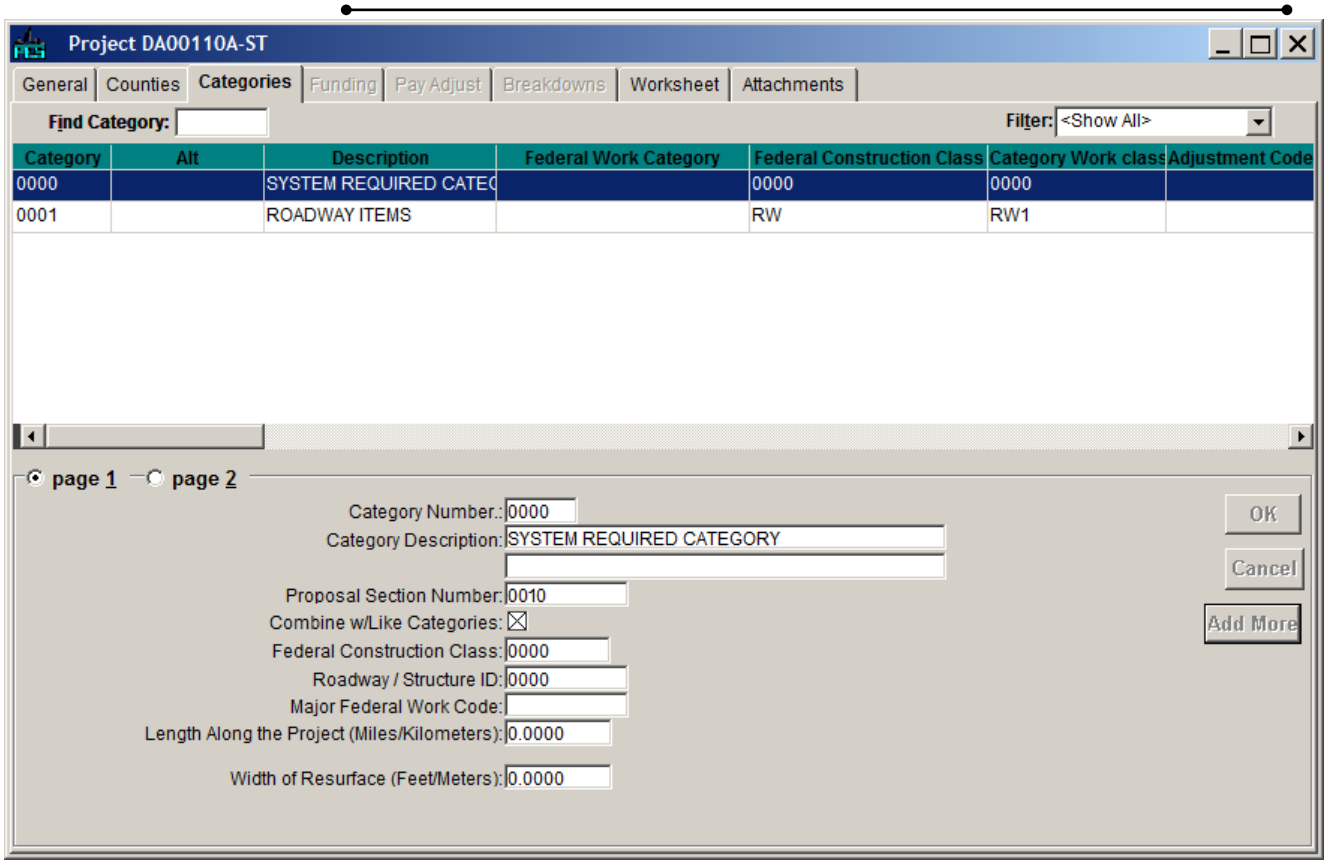
From the **General** tab of the copied project:

Step	Action	Result
1	Click the **CATEGORIES** tab.	The **Categories** tab will be brought forward.

Continued on Following Page

Customizing a Copied Project

(continued)



(*Edit Project Window – Categories Tab*)

Because you are may be editing this project template to reflect the categories required by the associated proposal section, you may need to delete a category and add a category.

Deleting a Category

If you need to delete a category:

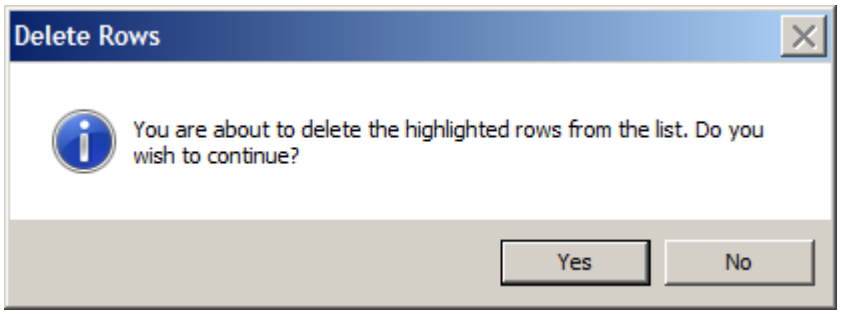
2	Click on the **row you wish to delete** to select it.	N/A
3	Right-click on the **row you wish to delete**.	A right-click menu will appear.

Continued on Following Page

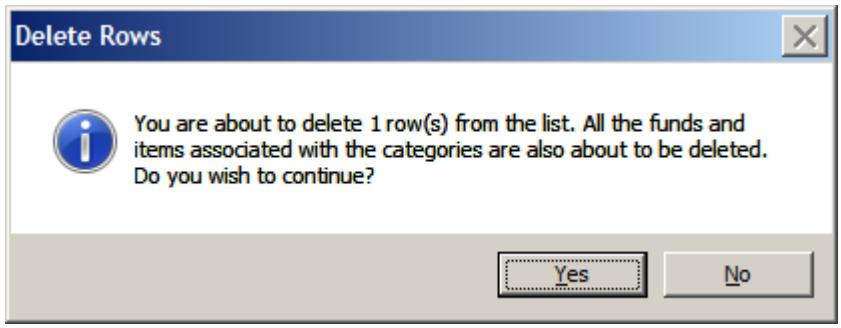
Customizing a Copied Project

(continued)

4	Select **DELETE** from the menu.	The following message will appear.



5	Click the **YES** button.	The following message will appear.



NOTE: Any items on the **Worksheet** tab associated with the category will also be deleted.

6	Click the **YES** button.	The selected row will disappear.

Continued on Following Page

Customizing a Copied Project

(continued)

7	Click the **SAVE FOLDER** button.	The information on the **Categories** tab will be saved.

Adding a Category

8	Right-click in the white space on the **Categories** tab.	A right-click menu will appear.

9	Select **ADD** from the menu.	A blank line will appear highlighted and data entry fields will appear below.

Adding Additional Category Types

Several different categories can be added at this point.

For **Roadway Items**, see **Adding a Roadway Category** on page **2-28**.

For **Culvert Items**, see **Adding a Culvert Category** on page **2-40**.

For **Wall Items**, see **Adding a Wall Category** on page **2-42**.

For **Structure Items**, see **Adding a Structure Category** on page **2-45**.

For **NPAR** Items, see **Categories for Non-Participating Items** on page **2-30**.

Continued on Following Page

Customizing a Copied Project

(continued)

Adding a Culvert Category

Step	Action	Result
1	Type **0001** in the **CATEGORY NUMBER** field. 🗁**NOTE:** When a project has more than one category, this number will increase sequentially as categories are added.	N/A
2	Type **CULVERT ITEMS** in the **CATEGORY DESCRIPTION** field.	N/A
3	Select **0002** from the drop-down list in the **PROPOSAL SECTION NUMBER** field.	N/A

🗁**NOTE:** Leave the **COMBINE W/LIKE CATEGORIES** check box checked.

4	Select **CV** from the drop-down list in the **FEDERAL CONSTRUCTION CLASS** field.	N/A
5	Select **CV01** from the drop-down list in the **ROADWAY/STRUCTURE ID** field. 🗁**NOTE:** Multiple culverts in the same project should be numbered sequentially. (CV01, CV02, CV03…)	N/A

🗁**NOTE:** The **MAJOR FEDERAL WORK CODE** field is used only for federally-funded projects.

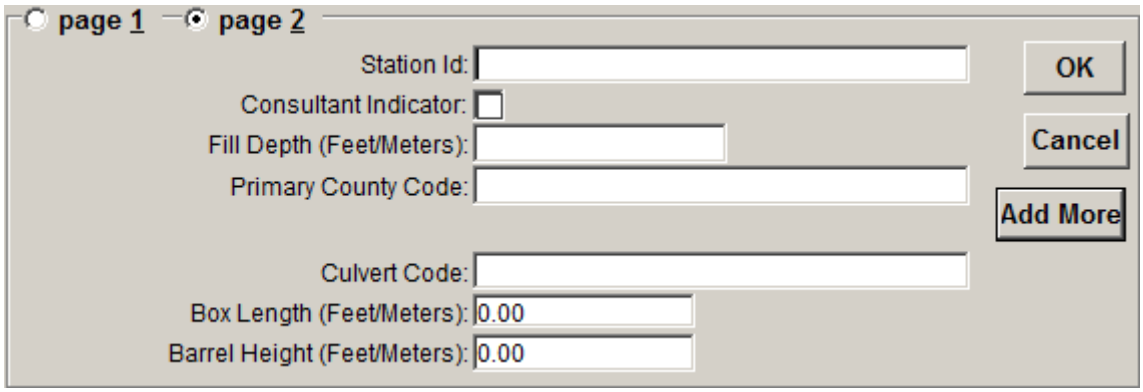
6	Type the **barrel width measurement** in the **SKEWED BARREL WIDTH IF OVER 20 FEET (MILES/KILOMETERS)** field.	N/A
7	Type the **barrel span measurement** in the **BARREL SPAN (FEET/METERS)** field.	N/A

Continued on Following Page

Customizing a Copied Project

(continued)

8	Click the **PAGE 2** radio button.	**Page 2** of the **Categories** tab will appear.



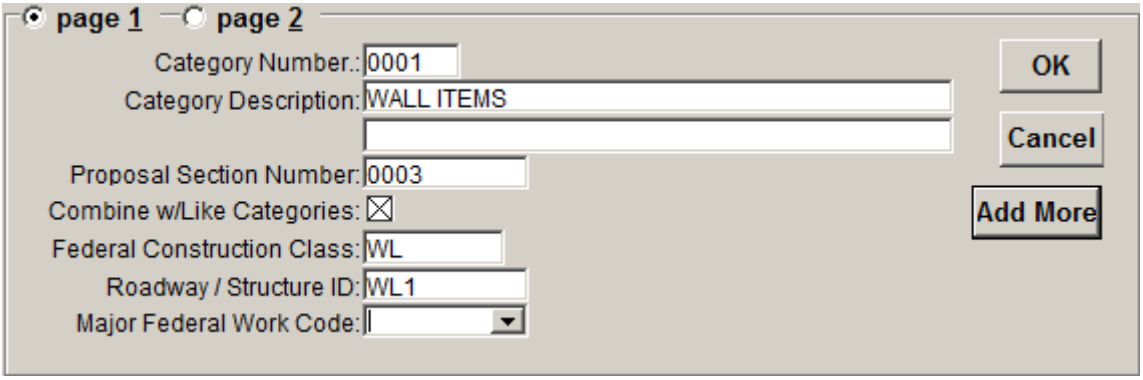
9	Type the **station ID** in the **STATION ID** field.	N/A
10	If the plans were designed by a consultant, check the **CONSULTANT INDICATOR** check box	N/A
11	Type the **fill depth** in the **FILL DEPTH (FEET/METERS)** field.	N/A
12	Select the **county** from the drop-down list in the **PRIMARY COUNTY CODE** field.	N/A
13	Select the **culvert code** from the drop-down list in the **CULVERT CODE** field.	N/A
14	Type the **box length measurement** in the **BOX LENGTH (FEET/METERS)** field.	N/A
15	Type the **barrel height measurement** in the **BARREL HEIGHT (FEET/METERS)** field.	N/A

Continued on Following Page

Customizing a Copied Project

(continued)

16	If you wish to add additional categories, click the Add More button and add the applicable information. If you are finished adding categories, click the OK button.	
17	Click the **SAVE FOLDER** button.	The information on the **Categories** tab will be saved.



Adding a Wall Category

Step	Action	Result
1	Type **0001** in the **CATEGORY NUMBER** field. **NOTE:** When a project has more than one category, this number will increase sequentially as categories are added.	N/A
2	Type **WALL ITEMS** in the **CATEGORY DESCRIPTION** field.	N/A
3	Select **0003** from the drop-down list in the **PROPOSAL SECTION NUMBER** field.	N/A

NOTE: Leave the **COMBINE W/LIKE CATEGORIES** check box checked.

Continued on Following Page

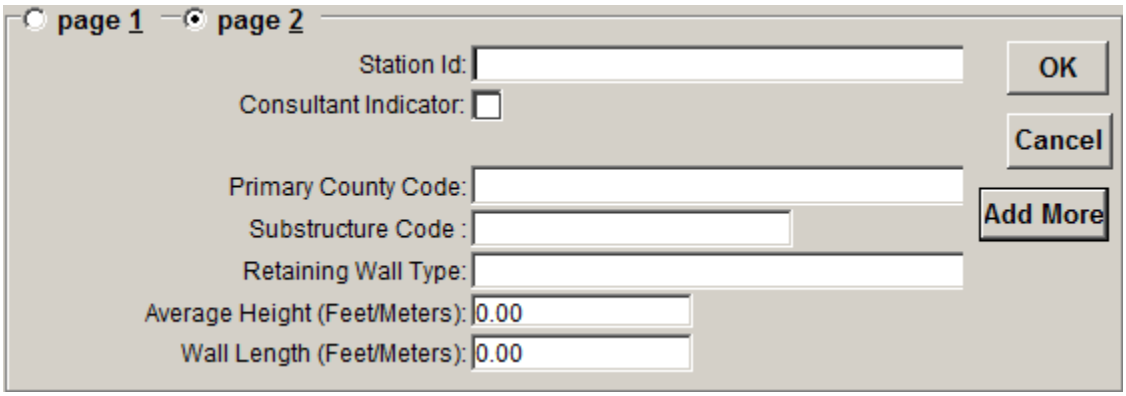
Customizing a Copied Project

(continued)

4	Select **WL** from the drop-down list in the **FEDERAL CONSTRUCTION CLASS** field.	N/A
5	Select **WL1** from the drop-down list in the **ROADWAY/STRUCTURE ID** field. 🗁**NOTE:** Multiple retaining walls in the same project should be numbered sequentially. (WL1, WL2, WL3…)	N/A

🗁**NOTE:** The **MAJOR FEDERAL WORK CODE** field is used only for federally-funded projects.

6	Click the **PAGE 2** radio button.	**Page 2** of the **Categories** tab will appear.



7	Type the **station ID** in the **STATION ID** field.	N/A
8	If the plans were designed by a consultant, check the **CONSULTANT INDICATOR** check box	N/A
9	Select the **county** from the drop-down list in the **PRIMARY COUNTY CODE** field.	N/A

Continued on Following Page

Customizing a Copied Project

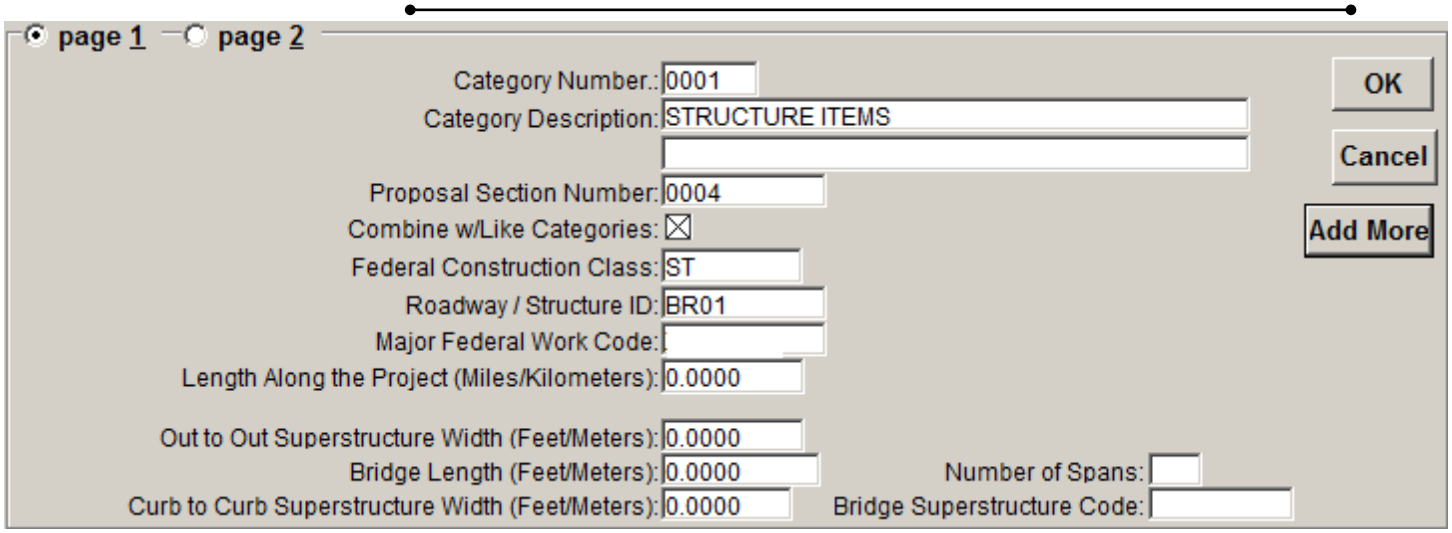
(continued)

10	Select the **substructure code** from the drop-down list in the **SUBSTRUCTURE CODE** field.	N/A
11	Select the **type of retaining wall** from the drop-down list in the **RETAINING WALL TYPE** field.	N/A
12	Type the **average height measurement** in the **AVERAGE HEIGHT (FEET/METERS)** field.	N/A
13	Type the **wall length measurement** in the **WALL LENGTH (FEET/METERS)** field.	N/A
14	If you wish to add additional categories, click the Add More button and add the applicable information. If you are finished adding categories, click the OK button.	
15	Click the **SAVE FOLDER** button.	The information on the **Categories** tab will be saved.

Continued on Following Page

Customizing a Copied Project

(continued)



Adding a Structure Category

Step	Action	Result
1	Type **0001** in the **CATEGORY NUMBER** field. 🗁**NOTE:** When a project has more than one category, this number will increase sequentially as categories are added.	N/A
2	Type **STRUCTURE ITEMS** in the **CATEGORY DESCRIPTION** field.	N/A
3	Select **0004** from the drop-down list in the **PROPOSAL SECTION NUMBER** field.	N/A

🗁**NOTE:** Leave the **COMBINE W/LIKE CATEGORIES** check box checked.

4	Select **ST** from the drop-down list in the **FEDERAL CONSTRUCTION CLASS** field.	N/A
5	Select **BR01** from the drop-down list in the **ROADWAY/STRUCTURE ID** field. 🗁**NOTE:** Multiple bridges in the same project should be numbered sequentially. (BR01, BR02, BR03…)	N/A

Continued on Following Page

Customizing a Copied Project

(continued)

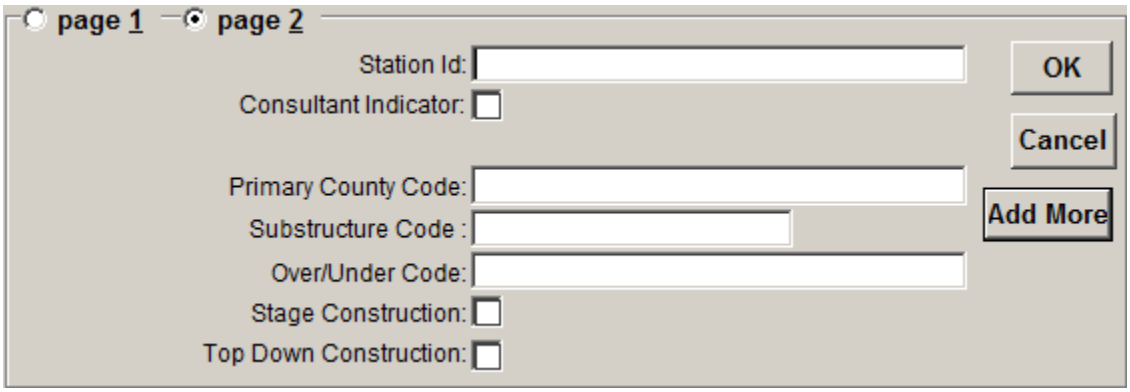
NOTE: If part of the structure contains non-participating items, you will need to create a second Structure category.

In this category, the value in the **MAJOR FEDERAL WORK TYPE CODE** field should be **NPAR**

The value in the **ROADWAY/STRUCTURE ID** field should remain the same as the original.

NOTE: The **MAJOR FEDERAL WORK CODE** field is used only for federally-funded projects.

6	Type the **structure length in miles** in the **LENGTH ALONG THE PROJECT (MILES KILOMETERS)** field.	N/A
7	Type the **out-to-out superstructure width measurement** in the **OUT TO OUT SUPERSTRUCTURE WIDTH (FEET/METERS)** field.	N/A
8	Type the **length of the bridge** in the **BRIDGE LENGTH (FEET/METERS)** field.	N/A
9	Type the curb to curb superstructure width measurement in the **CURB TO CURB SUPERSTRUCTURE WIDTH (FEET/METERS)** field.	N/A
10	Click the **PAGE 2** radio button.	**Page 2** of the **Categories** tab will appear.



Continued on Following Page

Customizing a Copied Project

(continued)

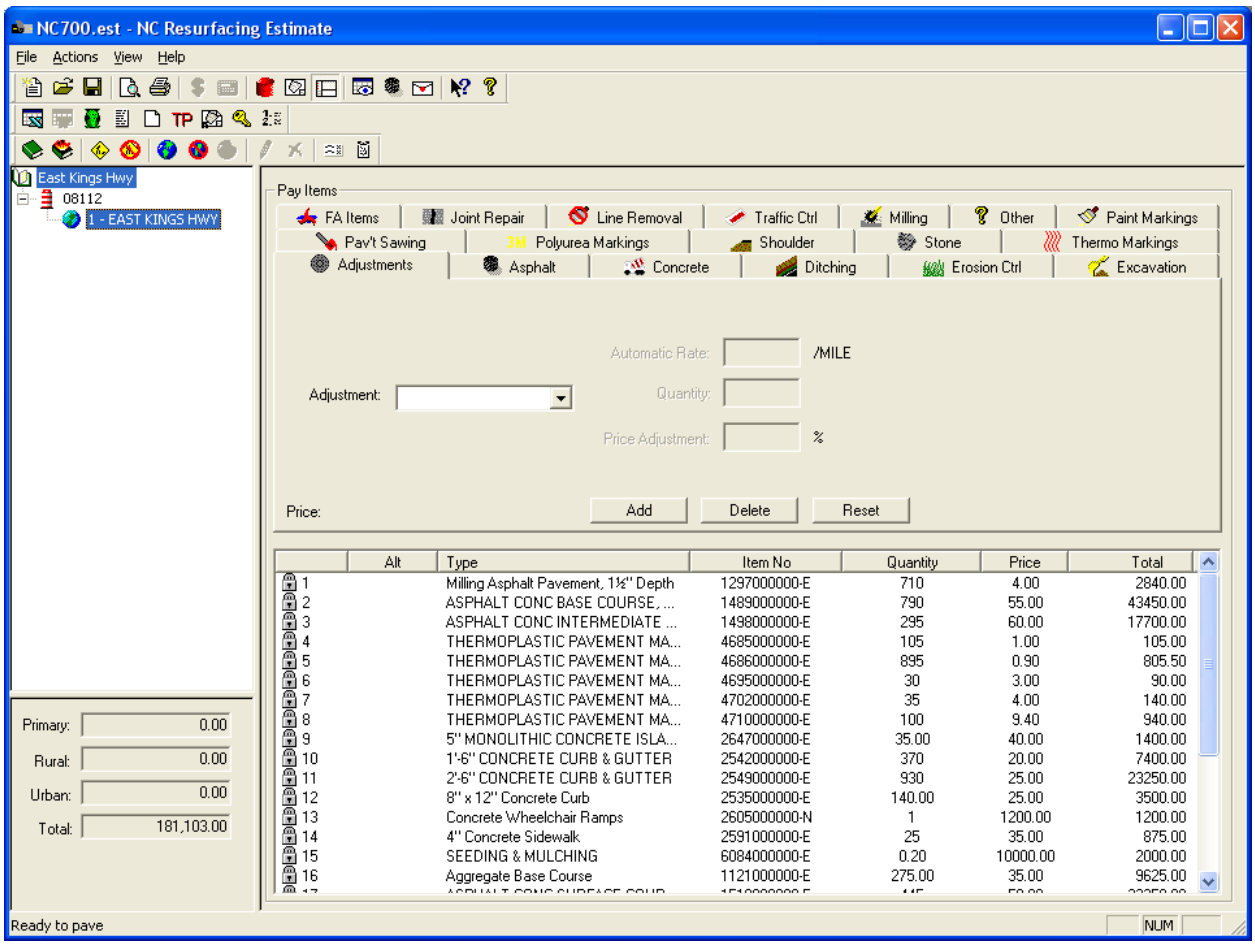
11	Type the **station ID** in the **STATION ID** field.	N/A
12	If the plans were designed by a consultant, check the **CONSULTANT INDICATOR** check box.	N/A
13	Select the **county** from the drop-down list in the **PRIMARY COUNTY CODE** field.	N/A
14	Select the **substructure code** from the drop-down list in the **SUBSTRUCTURE CODE** field.	N/A
15	Select the **over/under code** from the drop-down list in the **OVER/UNDER CODE** field.	N/A
16	If the construction will be done in stages, check the **STAGE CONSTRUCTION** check box.	N/A
17	If this will be top down construction, check the **TOP DOWN CONSTRUCTION** check box.	N/A
18	If you wish to add additional categories, click the Add More button and add the applicable information. If you are finished adding categories, click the OK button.	
19	Click the **SAVE FOLDER** button.	The information on the **Categories** tab will be saved.

Chapter 3 Quantity Estimation

Importing Pay Items from NC Resurfacing Estimate

Design engineers can import their line items from a Resurfacing Export file into Trns•port by following the steps below:

From the **NC Resurfacing Estimate Main** window:



(*NC Resurfacing Estimate Main Window*)

Once everything is correct and ready to be exported:

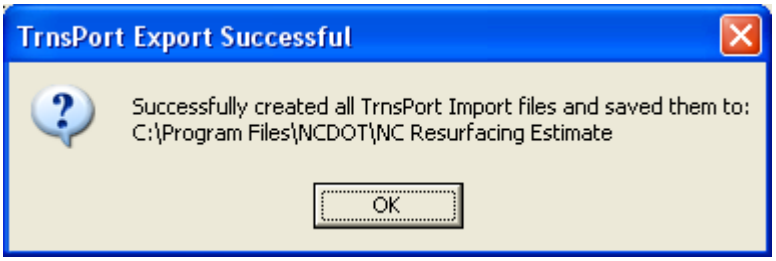
Exporting the Trns•port Export File

Step	Action	Result
1	Click the TP **EXPORT TRNS•PORT FILE** button.	The following message will appear.

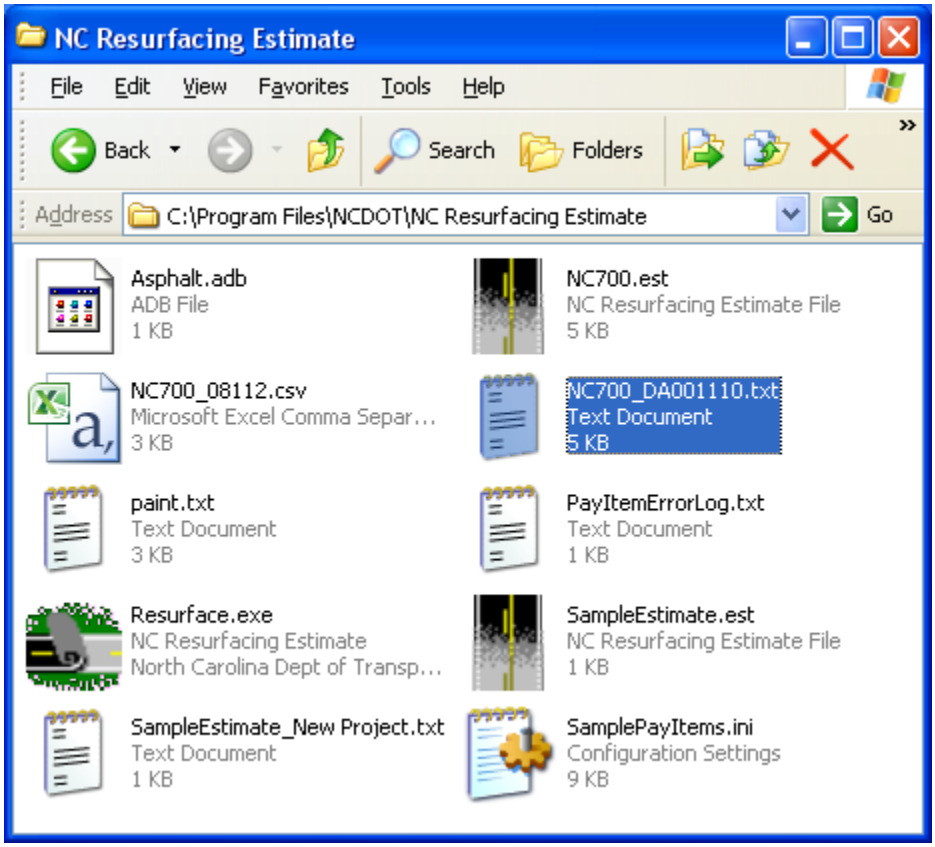
Continued on Following Page

Importing Pay Items from NC Resurfacing Estimate

(continued)



The exported file will be located in the same directory where the original estimate file was stored..



A separate file will be created for each project in the estimate.

The files will be named **[Estimate File Name]_[Project Number].txt**

Continued on Following Page

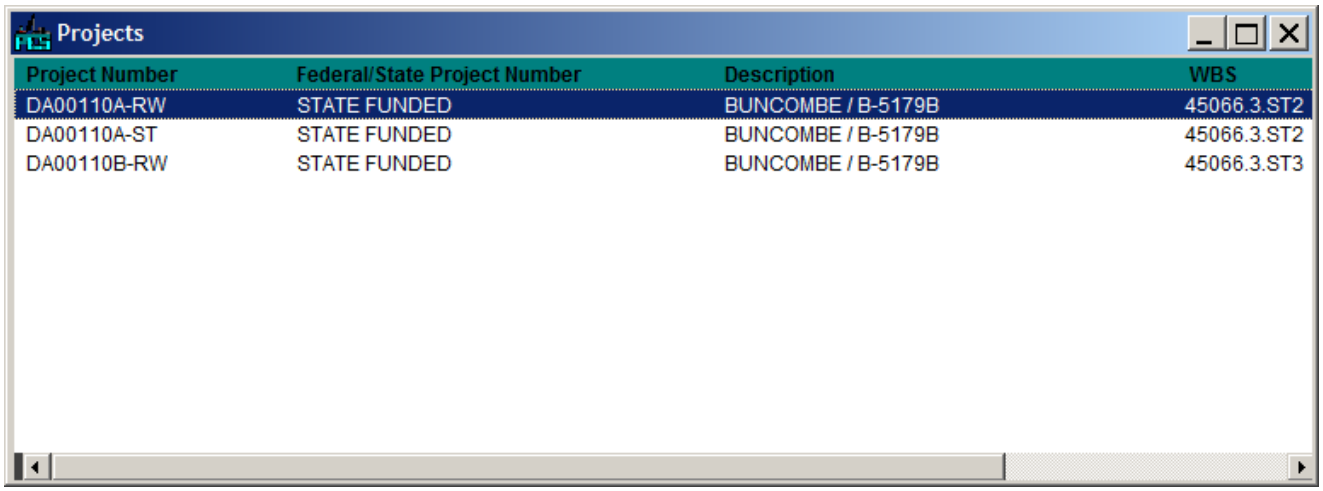
Importing Pay Items from NC Resurfacing Estimate

(continued)

Once you have successfully logged into **Trns•port PES**:

Importing the Trns•port Export File into PES

2	Click the **PROJECTS** button.	The **Projects** window will appear



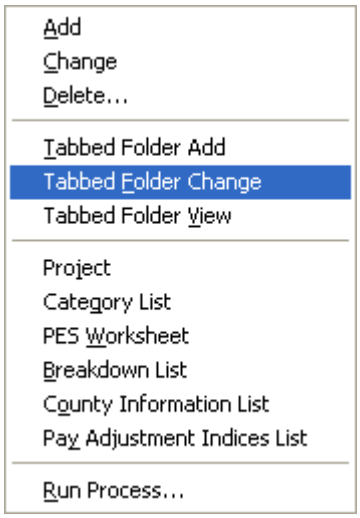
(*Projects Window*)

3	Right-click on the **project you wish to edit**. 🗁**NOTE:** See **Finding the Project Estimate Template** on page **2-32** to locate the project.	A right-click menu will appear.

Continued on Following Page

Importing Pay Items from NC Resurfacing Estimate

(continued)



4	Select **TABBED FOLDER CHANGE** from the menu.	The project will open to the **General** tab.
5	Click the **ATTACHMENTS** tab.	The **Attachments** tab will be brought forward.
6	Double-click the line with **GeoPak Line Item Interface** in the **DESCRIPTION** column.	The **GeoPak Line Item Interface** window will appear.

Continued on Following Page

Importing Pay Items from NC Resurfacing Estimate

(continued)

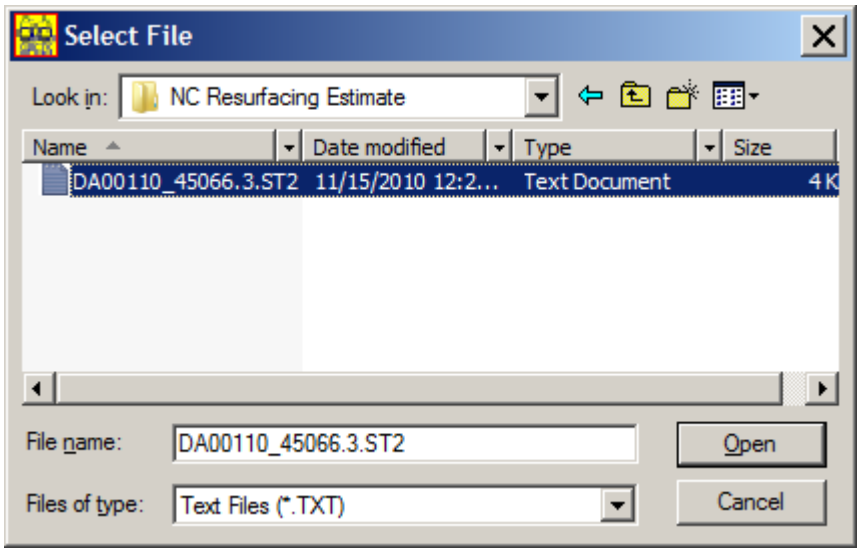
(*GeoPak Line Item Interface Window*)

7	Click the **SELECT FILE** button.	The **Select File** dialog will appear.

Continued on Following Page

Importing Pay Items from NC Resurfacing Estimate

(continued)



(*Select File Dialog*)

8	Find the file you wish to import and click on it to select it.	N/A

This will be the file exported from **NC Resurfacing Estimate**.

Files will be named:
[Estimate File Name]_[Project Number].txt

9	Click the **OPEN** button.	The file name and its location will appear in the **FILE NAME** field.

NOTE: The **specification year** and **number of the current project** will default into the **SPEC YEAR** and **PROJECT NUMBER** fields.

Continued on Following Page

Importing Pay Items from NC Resurfacing Estimate

(continued)

10	The **CATEGORY NUMBER** field will default to **0001** (the participating category). If any items are non-participating, change this to the appropriate non-participating category. If you have both, you will be able to change this manually on the worksheet tab after the import.	N/A

🗁**NOTE:** If the project is empty, the **STARTING LINE NUMBER** field will contain **0005**. This will be the beginning number of the item list.

The Line Item Increment field will contain 005. The line items will increase by this increment.

11	Click the **ADD TO EMPTY CATEGORY** radio button. 🗁**NOTE:** If you wish to append the items to an existing list, click the **APPEND ITEMS TO END** radio button.	The items will be added to the empty **Worksheet** tab.
12	Click the **OK** button.	The interface will validate the data and generate a message indicating the number of records that have been imported.

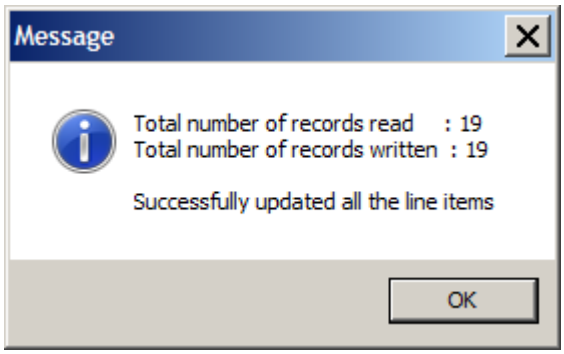
🗁**NOTE:** If the **Item Number** is not in the **Master Pay Item List** and/or a **Quantity** in a **Resurfacing** row is **zero**, an error report will be generated. The line items that appear on the error report must be manually entered on the Worksheet.

If you have an error, it will be indicated in the message that appears.

Continued on Following Page

Importing Pay Items from NC Resurfacing Estimate

(continued)



13	Close the project.	N/A
14	Re-open the project.	N/A

🗁**NOTE:** This must be done to refresh the data.

15	Click the **WORKSHEET** tab.	The **Worksheet** tab will be brought forward.

🗁**NOTE:** The Resurfacing items should appear on the worksheet tab.

Resurfacing Error Report

The Resurfacing error report will appear in the same folder as the original Resurfacing import file. It will be named **ERR_(name of the original file)**.

You will need to correct any errors and add the pay items on the report manually.

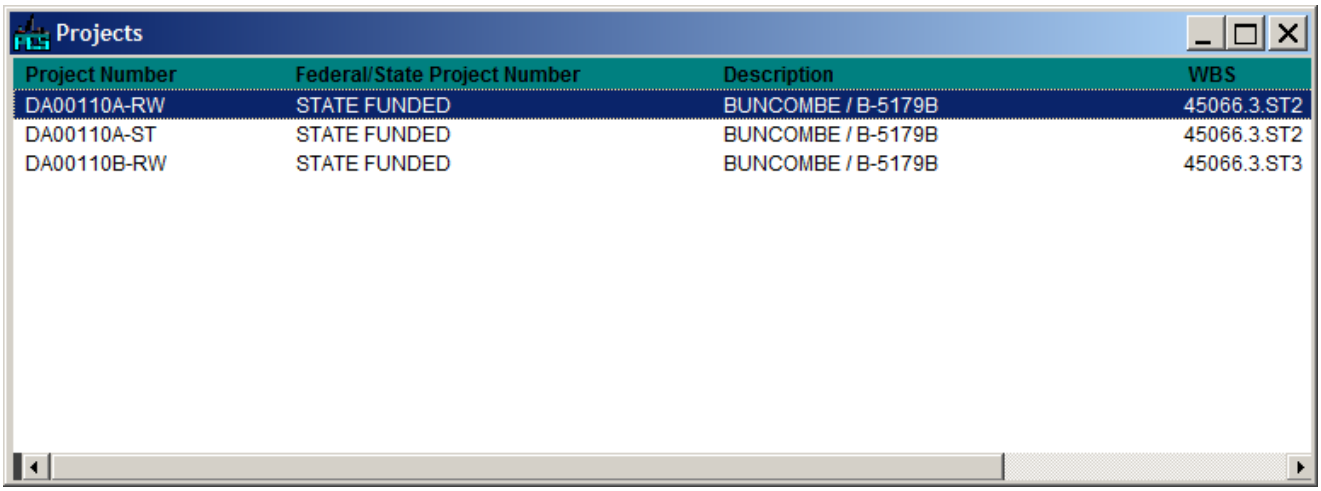
🗁**NOTE:** If you are unable to add an item, it may not be in the **Master Pay Item List (MPIL)**.
Check the **MPIL** online. Then contact the **Help Desk** with questions about what item to use.

Importing Pay Items from GeoPak

Roadway Design engineers can import their line items from a **GeoPak** file into **Trns•port** by following the steps below:

Once you have successfully logged into **Trns•port PES**:

From the **Projects** window:



(*Projects Window*)

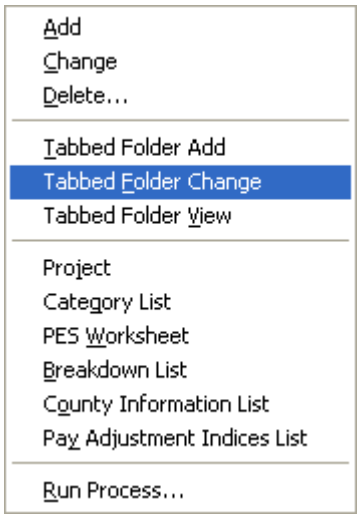
Step	Action	Result
1	Right-click on the **project you wish to edit**.	A right-click menu will appear.

🗁**NOTE:** See **Finding the Project Estimate Template** on page **2-32** to locate the project.

Continued on Following Page

Importing Pay Items from GeoPak

(continued)

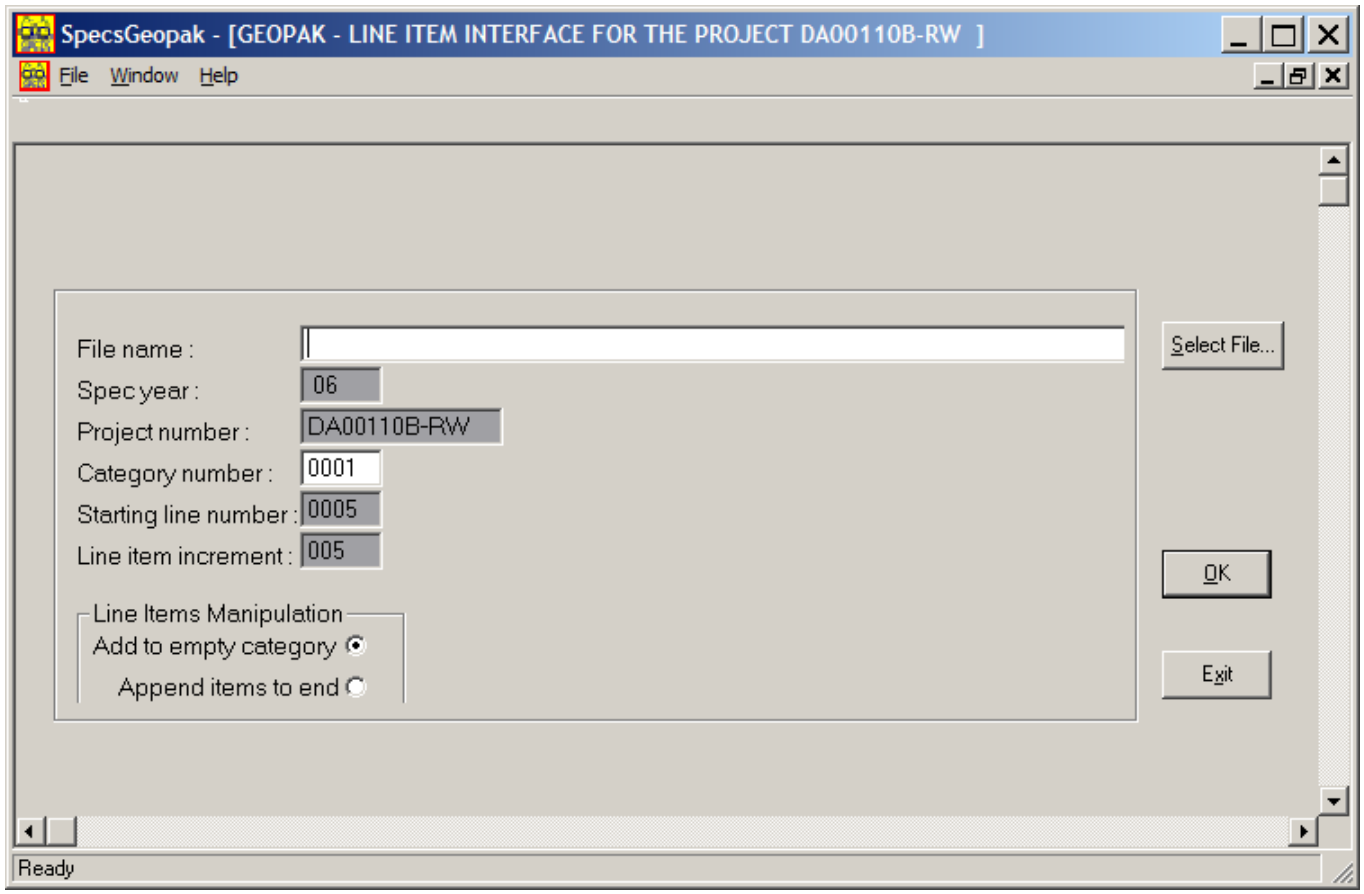


2	Select **TABBED FOLDER CHANGE** from the menu.	The project will open to the **General** tab.
3	Click the **ATTACHMENTS** tab.	The **Attachments** tab will be brought forward.
4	Double-click the line with **GeoPak Line Item Interface** in the **DESCRIPTION** column.	The **GeoPak Line Item Interface** window will appear.

Continued on Following Page

Importing Pay Items from GeoPak

(continued)



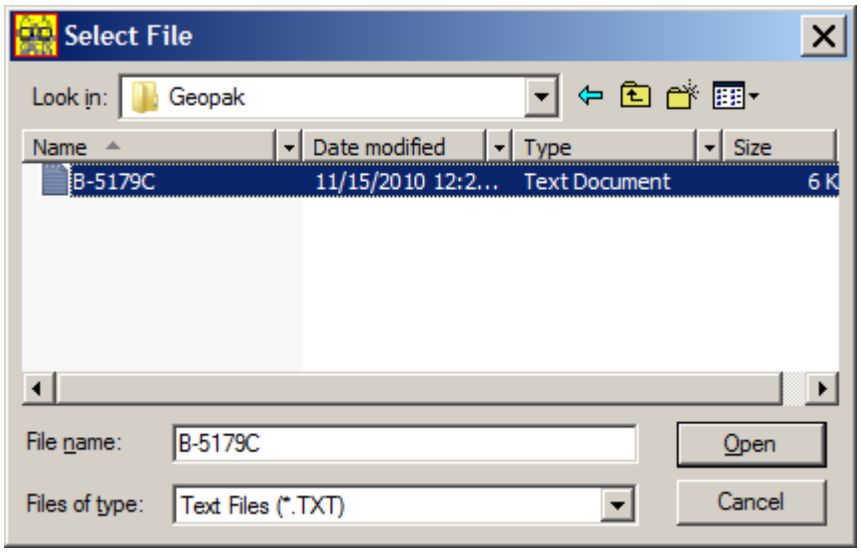
(*GeoPak Line Item Interface Window*)

5	Click the **SELECT FILE** button.	The **Select File** dialog will appear.

Continued on Following Page

Importing Pay Items from GeoPak

(continued)



(*Select File Dialog*)

6	Find the file you wish to import and click on it to select it.	N/A
7	Click the **OPEN** button.	The file name and its location will appear in the **FILE NAME** field.

🗁**NOTE:** The **specification year** and **number of the current project** will default into the **SPEC YEAR** and **PROJECT NUMBER** fields.

8	The **CATEGORY NUMBER** field will default to **0001** (the participating category). If all items are non-participating, change this to **0002**. If you have both, you will be able to change this manually on the worksheet tab after the import.	N/A

Continued on Following Page

Importing Pay Items from GeoPak

(continued)

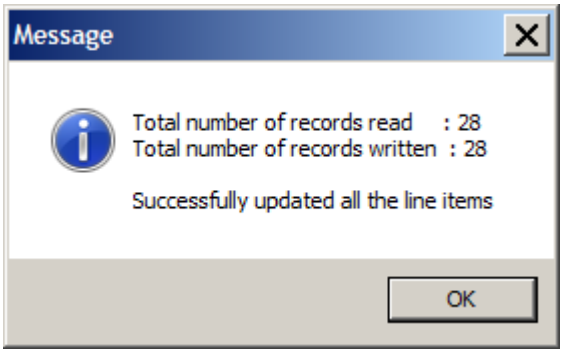
🗁**NOTE:** If the project is empty, the **STARTING LINE NUMBER** field will contain **0005**. This will be the beginning number of the item list.

The Line Item Increment field will contain 005. The line items will increase by this increment.

9	Click the **ADD TO EMPTY CATEGORY** radio button. 🗁**NOTE:** If you wish to append the items to an existing list, click the **APPEND ITEMS TO END** radio button.	The items will be added to the empty **Worksheet** tab.
10	Click the **OK** button.	The interface will validate the data.

🗁**NOTE:** If the **Item Number** is not in the **Master Pay Item List** and/or a **Quantity** in a **GeoPak** row is **zero**, an error report will be generated. The line items that appear on the error report must be manually entered on the Worksheet.

If you have an error, it will be indicated in the message that appears.



11	Close the project.	N/A
12	Re-open the project.	N/A

🗁**NOTE:** This must be done to refresh the data.

Continued on Following Page

Importing Pay Items from GeoPak

(continued)

13	Click the **WORKSHEET** tab.	The **Worksheet** tab will be brought forward.

🗁**NOTE:** The GeoPak items should appear on the worksheet tab.

GeoPak Error Report

The GeoPak error report will appear in the same folder as the original GeoPak import file. It will be named **ERR_(name of the original file)**.

You will need to correct any errors and add the pay items on the report manually.

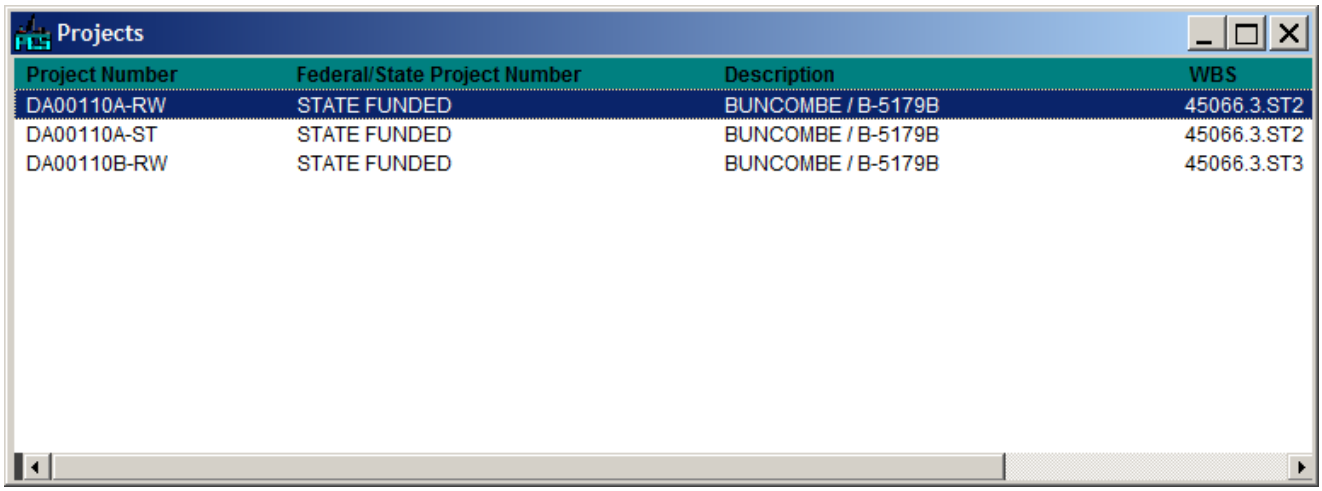
🗁**NOTE:** If you are unable to add an item, it may not be in the **Master Pay Item List (MPIL)**.
Check the **MPIL** online. Then contact the **Help Desk** with questions about what item to use.

Importing Pay Items from SAPW

If you receive a **SAPW** file that you must import into **Trns•port**, do the following:

Once you have successfully logged into **Trns•port PES**:

From the **Projects** window:



(*Projects Window*)

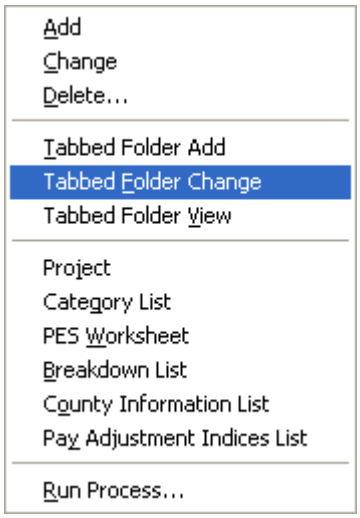
Step	Action	Result
1	Right-click on the **project you wish to edit**.	A right-click menu will appear.

🗁**NOTE:** See **Finding the Project Estimate Template** on page **2-32** to locate the project.

Continued on Following Page

Importing Pay Items from SAPW

(continued)

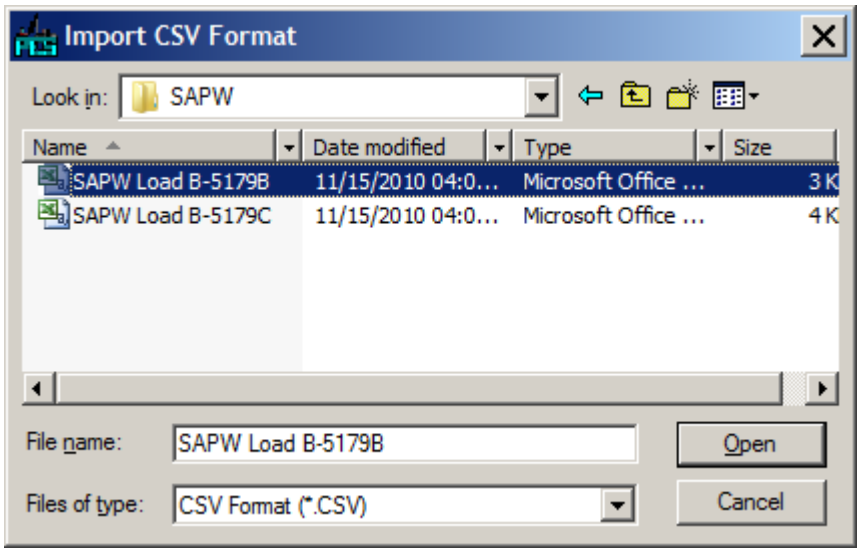


2	Select **TABBED FOLDER CHANGE** from the menu.	The project will open to the **General** tab.
3	Click the **WORKSHEET** tab.	The **Worksheet** tab will be brought forward.
4	Select **IMPORT**, then **LOAD WORKSHEET DATA** from the **FILE** drop-down menu.	The **Select Input File** dialog will appear.

Continued on Following Page

Importing Pay Items from SAPW

(continued)



(*Select Input File Dialog*)

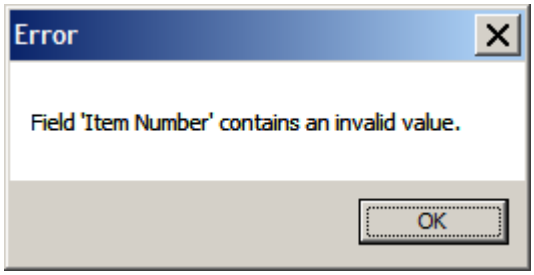
9	Find the file you wish to import and click on it to select it.	N/A
10	Click the **OPEN** button.	The file data will appear on the **Worksheet** tab.
11	Click the **SAVE FOLDER** button.	The information on the **Worksheet** tab will be saved

Continued on Following Page

Importing Pay Items from SAPW

(continued)

If you receive this message one of the following has occurred:



- There is an error, (typographical or lowercase character) in this field. You will need to correct it in order to move on.
- The item you have chosen has been rendered obsolete by changes in business rules dealing with the payment of items.

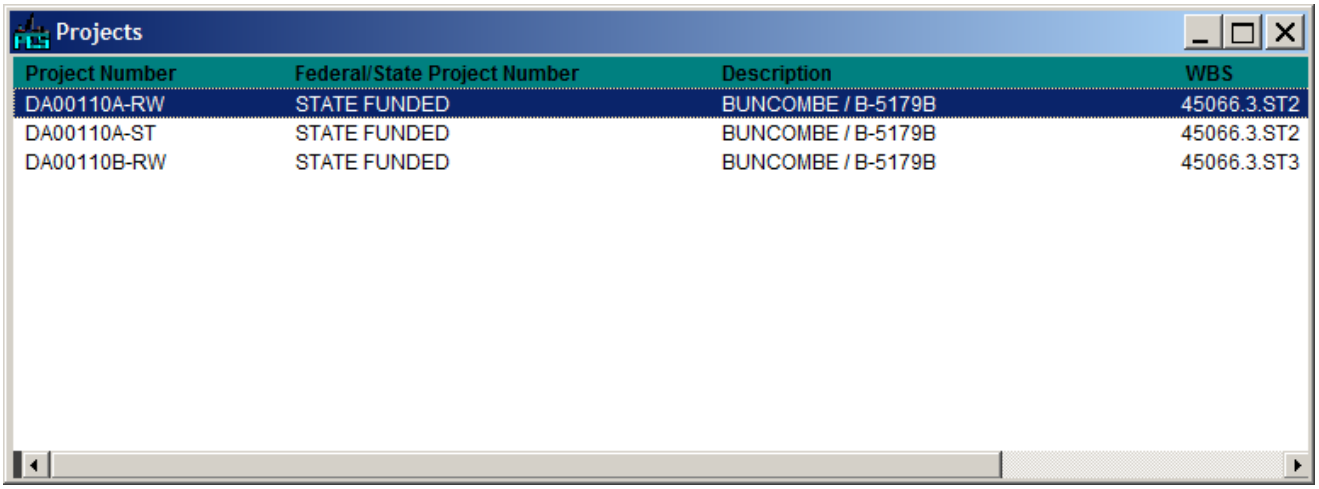
🗁**NOTE:** This occurs when entering the item number and will not allow you to continue without correcting it.

Adding Pay Items Manually

Pay items are grouped by categories. Estimators will enter items and quantities needed to complete a project in the appropriate category**. Do not enter any items (except force account items) in Category 0000.**

Once you have successfully logged into **Trns•port PES**:

From the **Projects** window:



(*Projects Window*)

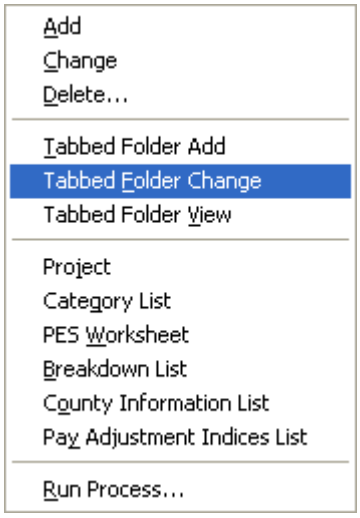
Step	Action	Result
1	Right-click on the **project you wish to edit**.	A right-click menu will appear.

🗁**NOTE:** See **Finding the Project Estimate Template** on page **2-32** to locate the project.

Continued on Following Page

Adding Pay Items Manually

(continued)



2	Select **TABBED FOLDER CHANGE** from the menu.	The project will open to the **General** tab.
3	Click the **WORKSHEET** tab.	The **Worksheet** tab will be brought forward.
4	Right-click anywhere on the **Worksheet** tab.	A right-click menu will appear.

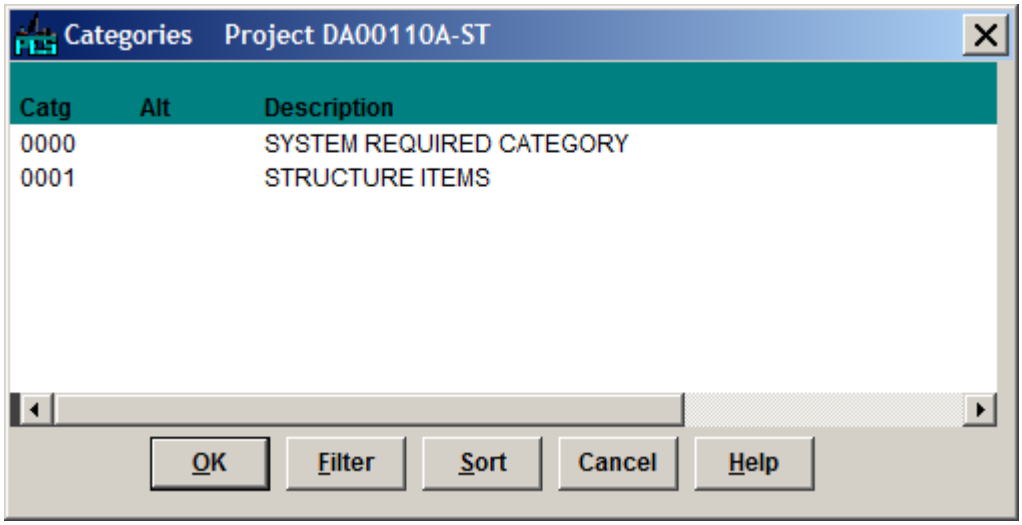
5	Select **ADD** from the menu.	A blank line will appear highlighted.

Continued on Following Page

Adding Pay Items Manually

(continued)

6	Click the ↓ down-arrow button beneath the **CATEGORY NUMBER** column.	The **Categories** dialog will appear.



(*Categories Dialog*)

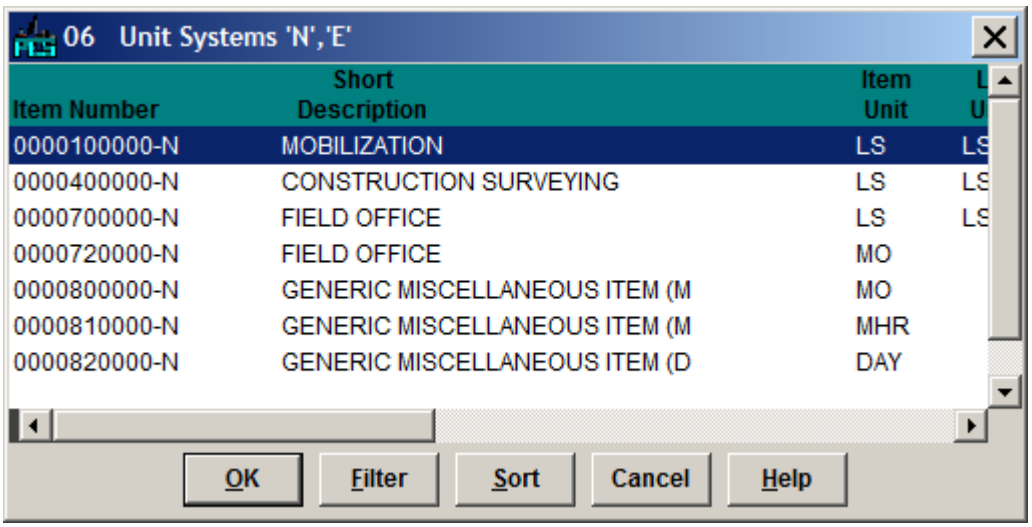
7	Click on the **category** to select it. 🗁**NOTE:** Category **0000** is only used for **Force Account** Items.	N/A.
8	Click the **OK** button.	The **CATEGORY NUMBER** field will contain the selected category.

Continued on Following Page

Adding Pay Items Manually

(continued)

9	Click the ↓ down-arrow button beneath the **ITEM NUMBER** column.	The **Items** dialog will appear.



(*Items Dialog*)

10	Click on the item to select it. **NOTE:** To make it easier to find specific items, see **Filtering Data in the Item List** on page **3-42** or **Creating a Saved Filter** on page **3-45**.	N/A

If you would like to add multiple items at the same time, hold down the Ctrl key and click each item you wish to add.

11	Click the **OK** button.	All information associated with the selected item(s) will fill all applicable item fields.

Continued on Following Page

Adding Pay Items Manually

(continued)

12	Type the item quantity in the **BREAKDOWN QUANTITY** field. If you added multiple items, you will need to do this for each item you added. 🗁**NOTE:** This field is formatted to accept whole numbers and up to 3 decimal places.	N/A

🗁**NOTE:** If you added multiple items, you will now have a line for each item selected.

If consecutive items fall within the same category follow these steps:

For any new lines that do not contain category numbers:

a	Click on the **CATEGORY NUMBER** column heading	The **Category Number** column will be selected.

🗁**NOTE:** Make sure the first line of the selected area contains the category number you wish to use.

b	Select **RANGE FILL**, then **FILL DOWN** from the **EDIT** drop-down menu.	The selected category number will fill all the way down that column

All **Master Pay Items** should be available in the list of items.

If an item you need is not in the list, pick an appropriate generic or skeleton item and customize it for you use.

Continued on Following Page

Adding Pay Items Manually

(continued)

13	For generic and skeleton items, you ***must*** type the entire description in the **SUPPLEMENTAL DESCRIPTION** field, especially for resurfacing items.	N/A

🗁**NOTE:** This field is **required** for generic and skeleton items and can accommodate up to **40 characters**.
An additional **SUPPLEMENTAL DESCRIPTION** field is provided if needed.

Supplemental descriptions ***must*** be uniform in their syntax. See **Appendix B** for examples.

When all of the pay items have been entered, you must:

- Assign **Breakdown IDs**
- Assign **Breakdown Item Line Numbers**
- Assign **Project Item Line Numbers**

🗁**NOTE:** This will also need to be done after each new session.

Assigning Breakdown IDs

14	Type **001** in the first field in the **BREAKDOWN ID** column. 🗁**NOTE:** **BREAKDOWN ID** is a system-required field and will always have a value of **001**. If information is pulled from the NC Resurfacing Program, it will have an extra leading zero.	N/A
15	Click on the **BREAKDOWN ID** column heading	The **Breakdown ID** column will be selected.
16	Select **RANGE FILL**, then **FILL DOWN** from the **EDIT** drop-down menu.	Each line of the **Breakdown ID** column will be populated with **001**.

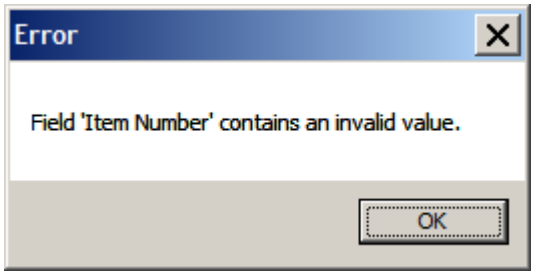
Continued on Following Page

Adding Pay Items Manually

(continued)

Assigning Breakdown Item Line Numbers	**17**	Double-click the **ITEM NUMBER** column heading. **NOTE:** You can also click the **SORT** button on the Toolbar.	The items will be listed in ascending order.
	18	Select **ASSIGN LINE NUMBERS**, then **BREAKDOWN ITEMS** from the **EDIT** drop-down menu.	The **Breakdown Item Line No.** column will be populated.
Assigning Project Item Line Numbers	**19**	Select **ASSIGN LINE NUMBERS**, then **PROJECT ITEMS** from the **EDIT** drop-down menu.	The **Project Item Line Number** column will be populated.
	20	Click the **SAVE FOLDER** button.	The information on the **Worksheet** tab will be saved

If you receive this message one of the following has occurred:



- There is an error, (typographical or lowercase character) in this field. You will need to correct it in order to move on.
- The item you have chosen has been rendered obsolete by changes in business rules dealing with the payment of items.

NOTE: This occurs when entering the item number and will not allow you to continue without correcting it.

IMPORTANT!

You **MUST** always sort the **ITEM NUMBER** column in ascending order and generate new **Breakdown** and **Project Item Line Numbers** after **EACH SESSION**.

Editing Pay Items

Data-Entry Fields

On the **Worksheet** tab, data-entry fields will have a white background.

To edit text:

- Click in any blank field and type
- Select existing text and overwrite it or press the Delete key to delete it.

Inserting Pay Item Rows

To insert line items on a worksheet:

Once you have successfully logged into **Trns•port PES**:

From the **Worksheet** tab:

Step	Action	Result
1	Right-click on the **row you wish to add an item before or after**.	A right-click menu will appear.

2	If you wish to add a row **BEFORE** the selected row, select **INSERT ROW** from the menu. If you wish to add a row **at the bottom of the list of items**, select **ADD ROW TO END**.	A blank row will appear.

Continued on Following Page

Editing Pay Items

(continued)

3	Fill in the item information. 🗁**NOTE:** See **Adding Pay Items Manually** on page **3-19**. Be sure to: • Sort items by **Item Number** in ascending order • Assign **Breakdown IDs** • Assign **Breakdown Item Line Numbers** • Assign **Project Item Line Numbers**	
4	Click the SAVE FOLDER button.	The edited information will be saved

Deleting Pay Item Rows

To delete line items on a worksheet:

From the **Worksheet** tab:

Step	Action	Result
1	Right-click on the **row you wish to delete**.	A right-click menu will appear.

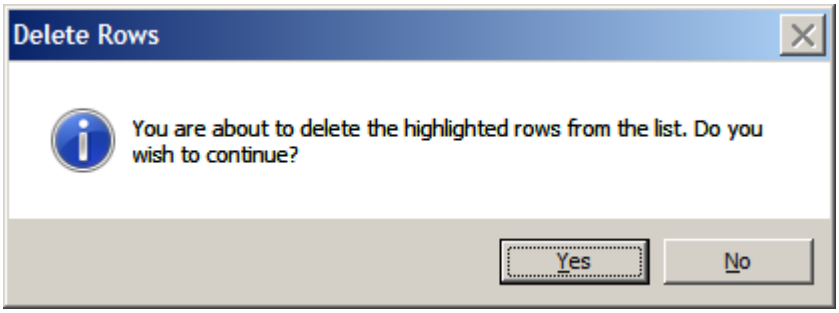
🗁**NOTE:** If you wish to delete multiple rows, hold down the Ctrl key and click each row you wish to delete.
If the rows are sequential, you can hold down the Shift key and click the beginning and ending rows in the sequence.

Continued on Following Page

Editing Pay Items

(continued)

2	Select **DELETE** from the menu.	The following message will appear.



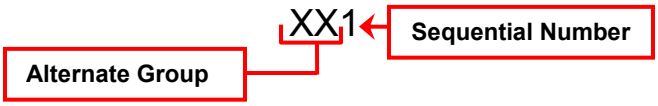
3	Click the **YES** button.	The row will be deleted.
4	Be sure whenever you have deleted rows to: • Sort items by **Item Number** in ascending order • Assign **Breakdown IDs** • Assign **Breakdown Item Line Numbers** • Assign **Project Item Line Numbers**	
5	Click the **SAVE FOLDER** button.	The edited information will be saved

Alternate Items

In certain situations, contractors are given the option of selecting between multiple items to bid. The way to indicate this is with the **ALTERNATE CODE** field.

The **Alternate Code** is used to differentiate between groups of alternates and alternates within a group. The first two characters identify the **alternate group** and the third character identifies the **alternate number**.

For example, to define two Roadway items as alternates for one another, the user would enter **AA1** in the **ALT CODE** field for the first item and **AA2** in the **ALT CODE** field for the second item. The fact that both codes begin with **AA** indicates that a bidder should choose among them.



If a contractor is allowed to choose between 3 different items, for each **ITEM NUMBER**, the **ALTERNATE CODE** fields need to be filled with codes **XX1**, **XX2**, and **XX3**.

Item Number Example (Single)	Roadway Alternate Code Example
0312000000-E	AA1
0315000000-E	AA2
Item Number Example (Group)	**Roadway Alternate Code Example**
0315000000-E 0316000000-E	AB1 AB1
0376000000-E 0377000000-E	AB2 AB2

To indicate that an item is an **Alternate Item**:

Once you have successfully logged into **Trns•port PES**:

From the **Worksheet** tab:

Step	Action	Result
1	Enter Pay Item information normally. (See **Adding Pay Items Manually** on page **3-19**.)	N/A

Continued on Following Page

Alternate Items

(continued)

2	For each alternate item, type an **alternate code** in the **ALT CODE** field.	N/A

Force Account Items

You may be required to add items to Federally Funded projects for work that will be performed by state forces. These are **Force Account** items. For force account items, quantity estimators will enter materials, labor, and equipment costs in the supplemental description and mark these as non-bid items.

To indicate that an item is an **Force Account Item**:

Once you have successfully logged into **Trns•port PES**:

From the **Worksheet** tab:

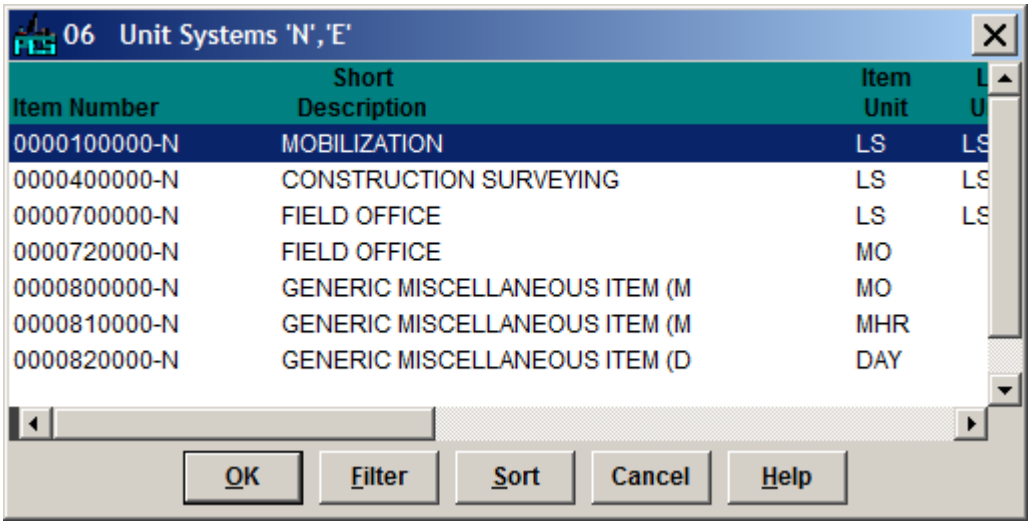
Step	Action	Result
1	Right-click on the **row you wish to add an item after**.	A right-click menu will appear.

2	Select **ADD ROW TO END** from the menu.	A blank row will appear.
3	Select **0000** from the drop-down list in the **CATEGORY NUMBER** field. **NOTE:** This is the category number to be used for all **Force Account** Items.	N/A
4	Click the down-arrow button beneath the **ITEM NUMBER** column.	The **Items** dialog will appear.

Continued on Following Page

Force Account Items

(continued)



(*Items Dialog*)

5	Click on the item to select it.	N/A

IMPORTANT!

ALL force account item numbers are ***9*** series.
NEVER use any of the other item numbers for **Force Account Items**.

If you would like to add multiple items at the same time, hold down the Ctrl key and click each item you wish to add.

6	Click the **OK** button.	All information associated with the selected item(s) will fill all applicable item fields.
7	Type **1** in the **BREAKDOWN ITEM QUANTITY** field.	N/A
8	Type the **total dollar amount of the Force Account** in the **ESTIMATED UNIT PRICE** field.	N/A

Continued on Following Page

Force Account Items

(continued)

9	Type a **description of the item** in the **SUPPLEMENTAL DESCRIPTION** field. 🗁**NOTE:** All Force Account items require an entry in the **SUPPLEMENTAL DESCRIPTION** field.	N/A

This should be in the following format:

MAT $XX, LAB $XX, EQUIP $XX or

XXSF AT $XX.XX PER SF (or XXM2 AT $XX.XX PER M2)

For example **MAT $2,500, LAB $500, EQUIP $500** or **12.5M2 AT $125.27 PER M2**.

10	Type **Y** in the **STATE MAT FLAG** field.	N/A
11	Type **Y** in the **PRICE LOCK FLAG** field.	N/A
12	Type **001** in the first row in the **BREAKDOWN ID** column. 🗁**NOTE:** **BREAKDOWN ID** is a system-required field and will always have a value of **001**. If information is pulled from the NC Resurfacing Program, it will have an extra leading zero.	N/A
13	Click on the **BREAKDOWN ID** column heading	The **Breakdown ID** column will be selected.
14	Select **RANGE FILL**, then **FILL DOWN** from the **EDIT** drop-down menu.	Each line of the **Breakdown ID** column will be populated with **001**.
15	Double-click the **ITEM NUMBER** column heading. 🗁**NOTE:** You can also click the **SORT** button on the Toolbar.	The items will be listed in ascending order.

Continued on Following Page

Force Account Items

(continued)

16	Select **ASSIGN LINE NUMBERS**, then **BREAKDOWN ITEMS** from the **EDIT** drop-down menu.	The **Breakdown Item Line No.** column will be populated.
17	Select **ASSIGN LINE NUMBERS**, then **PROJECT ITEMS** from the **EDIT** drop-down menu.	The **Project Item Line Number** column will be populated.
18	Click the **SAVE FOLDER** button.	The information on the **Worksheet** tab will be saved

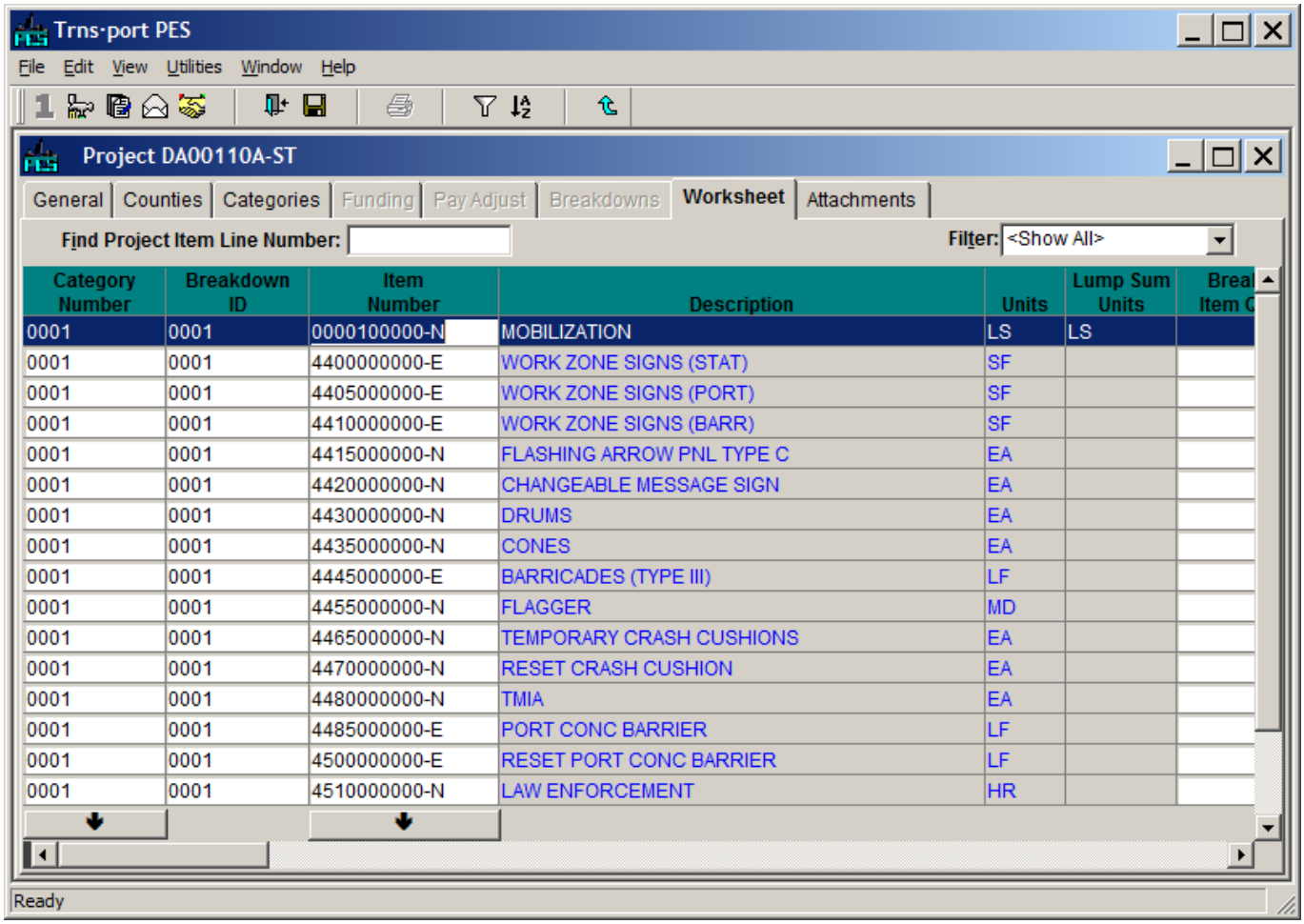
Customizing the Worksheet View

Before you begin the estimation process, you should know how to hide, display, and move worksheet columns as well as sort and filter data.

Hiding Columns

Once you have successfully logged into **Trns•port PES**:

From the **Worksheet** tab:



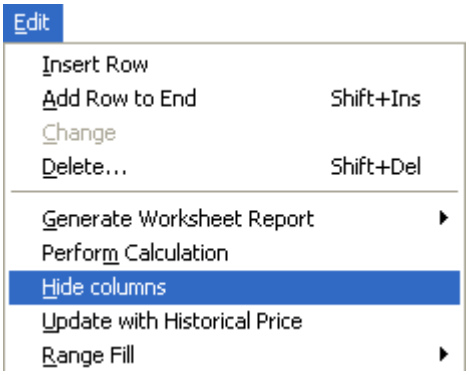
Category Number	Breakdown ID	Item Number	Description	Units	Lump Sum Units	Breal Item C
0001	0001	0000100000-N	MOBILIZATION	LS	LS	
0001	0001	4400000000-E	WORK ZONE SIGNS (STAT)	SF		
0001	0001	4405000000-E	WORK ZONE SIGNS (PORT)	SF		
0001	0001	4410000000-E	WORK ZONE SIGNS (BARR)	SF		
0001	0001	4415000000-N	FLASHING ARROW PNL TYPE C	EA		
0001	0001	4420000000-N	CHANGEABLE MESSAGE SIGN	EA		
0001	0001	4430000000-N	DRUMS	EA		
0001	0001	4435000000-N	CONES	EA		
0001	0001	4445000000-E	BARRICADES (TYPE III)	LF		
0001	0001	4455000000-N	FLAGGER	MD		
0001	0001	4465000000-N	TEMPORARY CRASH CUSHIONS	EA		
0001	0001	4470000000-N	RESET CRASH CUSHION	EA		
0001	0001	4480000000-N	TMIA	EA		
0001	0001	4485000000-E	PORT CONC BARRIER	LF		
0001	0001	4500000000-E	RESET PORT CONC BARRIER	LF		
0001	0001	4510000000-N	LAW ENFORCEMENT	HR		

(*Worksheet Tab*)

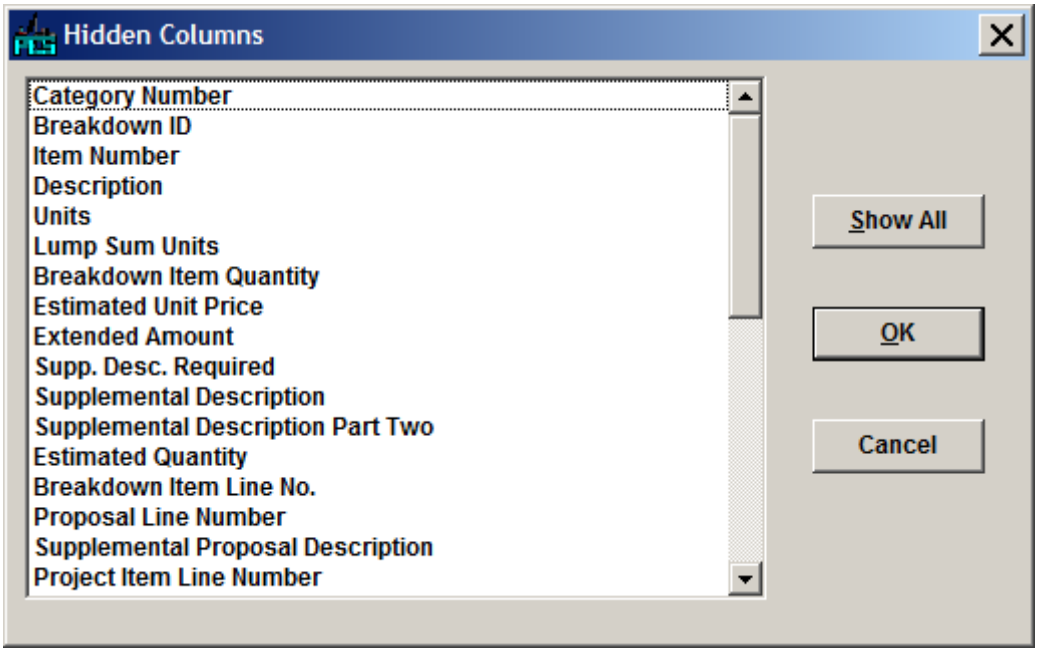
Continued on Following Page

Customizing the Worksheet View

(continued)



Step	Action	Result
1	From the **EDIT** drop-down menu, select **HIDE COLUMNS**.	The **Hidden Columns** dialog will appear.



(*Hidden Columns Dialog*)

2	Click on the **names of the columns** you wish to hide.	The column names you selected will appear highlighted.

Continued on Following Page

Customizing the Worksheet View

(continued)

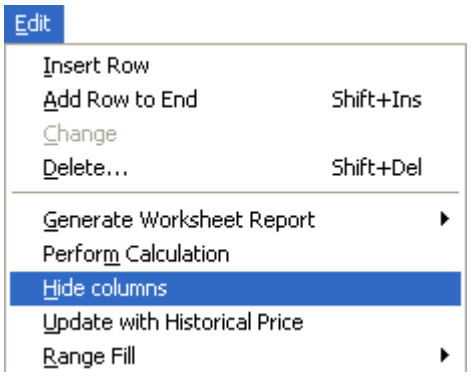
NOTE: You should hide the following columns:

- Exception Fund Code
- Breakdown Item Comment
- Breakdown Item Generic Number 1
- Breakdown Item Generic String 1
- Revised Item Price

3	Click the **OK** button	The columns you selected will be hidden.

Displaying Hidden Columns

If a column is hidden and you wish to see it, follow this procedure.



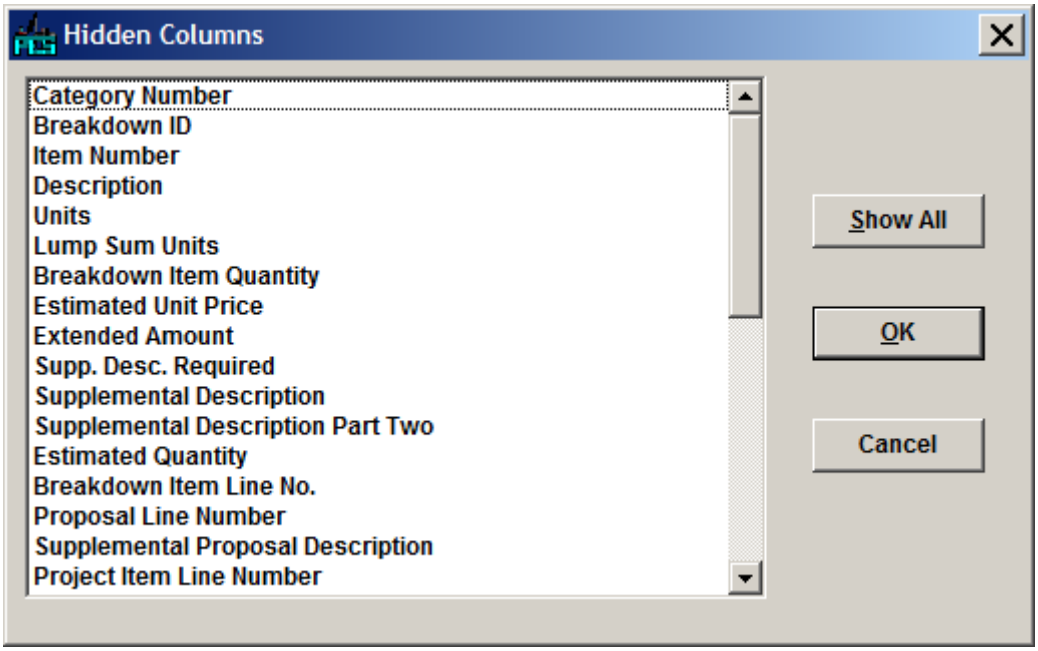
From the **Worksheet** tab:

Step	Action	Result
1	From the **EDIT** drop-down menu, select **HIDE COLUMNS**.	The **Hidden Columns** dialog will appear.

Continued on Following Page

Customizing the Worksheet View

(continued)



(*Hidden Columns Dialog*)

2	Click the **SHOW ALL** button.	The hidden columns will appear at the end of the worksheet.

NOTE: You will not be able to unhide columns individually. Instead, you would **SHOW ALL**, then repeat the **Hiding Columns** procedure for the columns you want hidden.

Continued on Following Page

Customizing the Worksheet View

(continued)

Moving Columns

You will be able to click and drag to re-arrange columns.

From the **Worksheet** tab:

Step	Action	Result
1	Click the heading of the column you wish to move. Keep holding down the mouse button and drag it to its new location on the worksheet.	The column has been moved to its new destination.

Here is a suggested order of columns:

1. ***Category Number***
2. ***Breakdown ID***
3. ***Item Number***
4. ***Description***
5. ***Units***
6. ***Lump Sum Units***
7. ***Breakdown Item Quantity***
8. ***Alt Code***
9. ***Supplemental Desc Required***
10. ***Supplemental Description***
11. ***Supplemental Description Part Two***
12. ***Estimated Unit Price***
13. ***Extended Amount***
14. ***Price Lock Flag***
15. ***State Mat Flag***
16. ***Supplemental Proposal Description***
17. ***Proposal Line Number***
18. ***Breakdown Item Line Number***
19. ***Project Item Line Number***
20. ***Combined Flag***
21. ***Price Source***
22. ***Estimated Quantity***
23. ***Fixed Price***

Continued on Following Page

Customizing the Worksheet View

(continued)

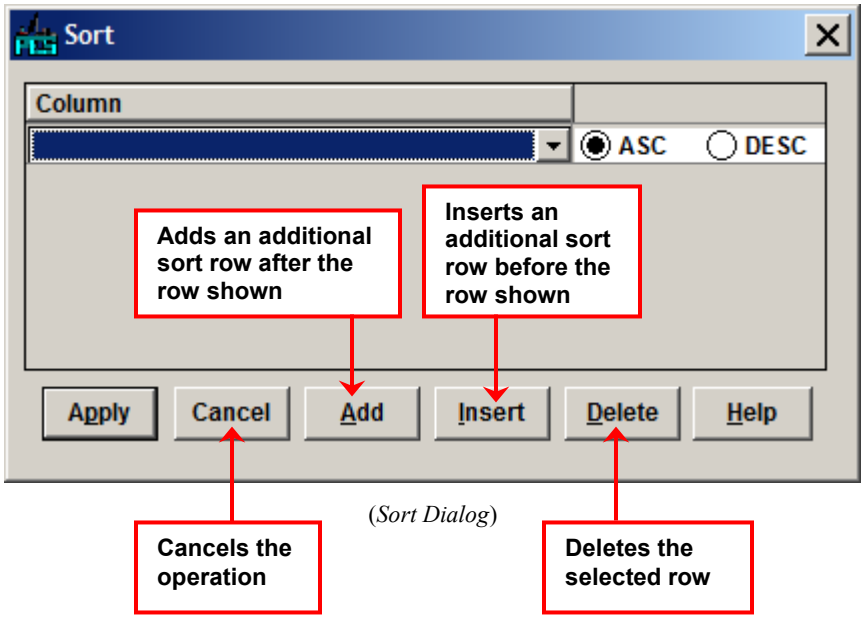
Sorting Data

You will be able sort the data in ascending or descending order by column.

On the **Worksheet** tab, double-click any column heading to sort by that column. Double-click again to reverse the sort order.

From the **Projects** or **Worksheet** tab:

Step	Action	Result
1	Click the SORT button on the toolbar.	The **Sort** dialog will appear.



(*Sort Dialog*)

2	Select the **column you wish to sort** from the drop-down list in the COLUMN field.	N/A
3	Click the **ASC** radio button for ascending or the **DESC** radio button for descending.	N/A

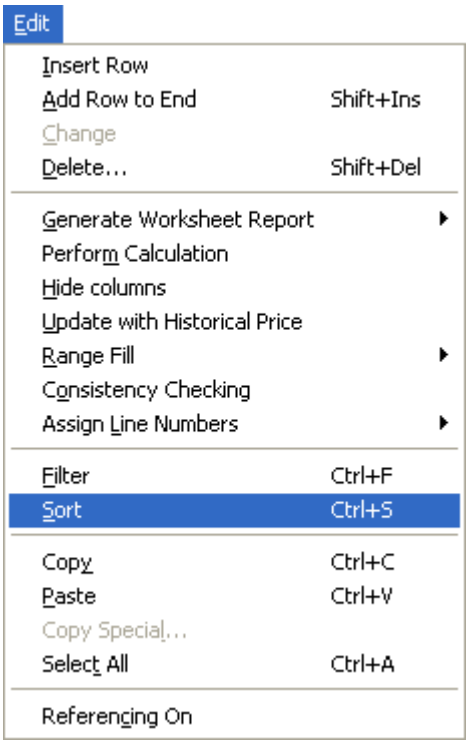
Continued on Following Page

Customizing the Worksheet View

(continued)

4	Click the **APPLY** button.	The data will be sorted according to the specified criteria.

NOTE: You will also be able to access the **Sort** dialog from the right-click menu or by selecting **SORT** from the **EDIT** drop-down menu.



Continued on Following Page

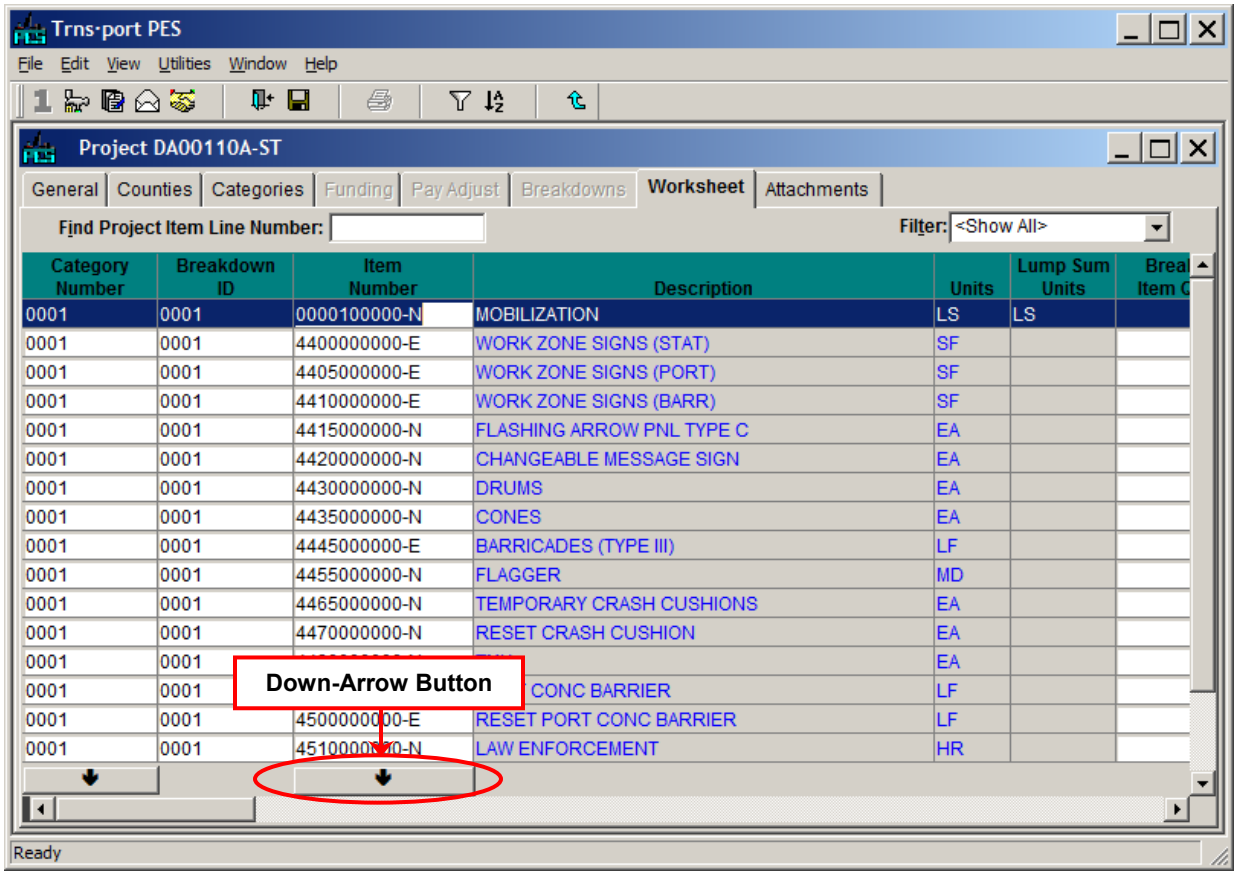
Customizing the Worksheet View

(continued)

Filtering Data in the Item List

From the **Worksheet** tab:

NOTE: We do not recommend filtering items on the **Worksheet** tab itself, only within the **Items** dialog.



(*Worksheet Tab*)

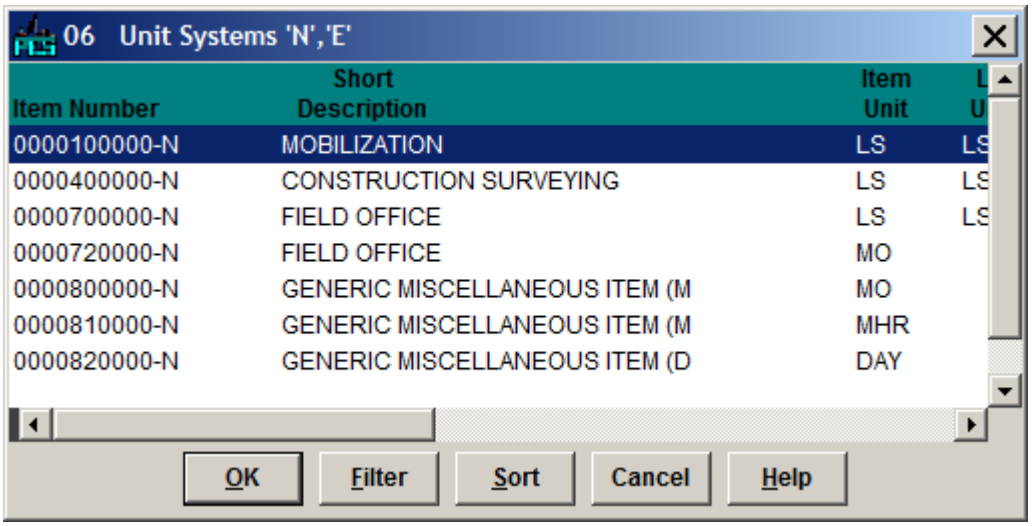
Step	Action	Result
1	Click the [↓] DOWN-ARROW button beneath the ITEM NUMBER column.	The **Items** dialog will appear.

NOTE: The items available to your unit will be listed in ascending order by item number.

Continued on Following Page

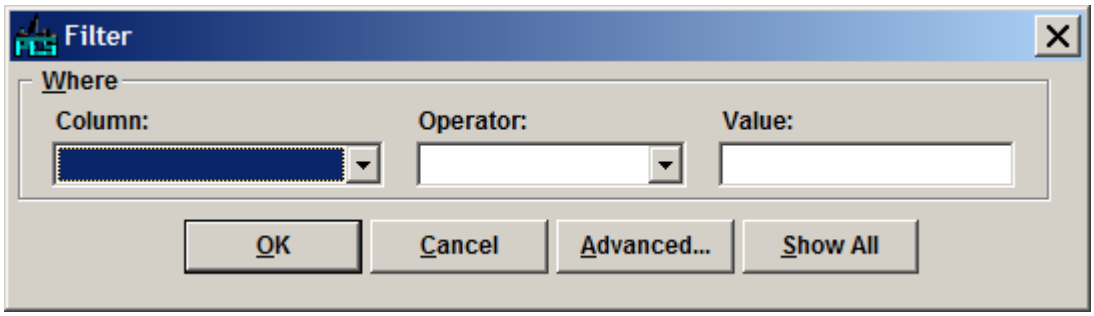
Customizing the Worksheet View

(continued)



(*Items Dialog*)

2	Click the **FILTER** button.	The **Filter** dialog will appear.



(*Filter Dialog*)

3	Select the **column you wish to filter by** from the drop-down list in the **COLUMN** field.	N/A

Continued on Following Page

Customizing the Worksheet View

(continued)

4	Select **an operator** from the drop-down list in the **OPERATOR** field.	N/A

Operator	Definition
<	Less than
<=	Less than or equal to
<>	Not equal to
=	Equal to
>	Greater than
>=	Greater than or equal to
Contains	Contains
Does Not Contain	Does not contain
Like	Sounds like
Not Like	Does not sound like

5	Type the **value you wish to filter by** in the **VALUE** field.	N/A
6	Click the **OK** button.	Only the filtered items will appear in the list.

🗁**NOTE:** Clicking the **SHOW ALL** button on the **Filter** dialog will remove the filter.

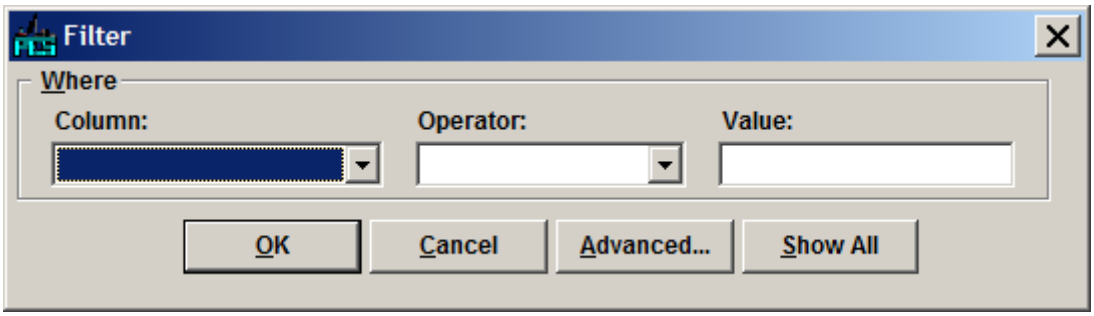
Continued on Following Page

Customizing the Worksheet View

(continued)

Creating a Saved Filter

From the **Filter** dialog:



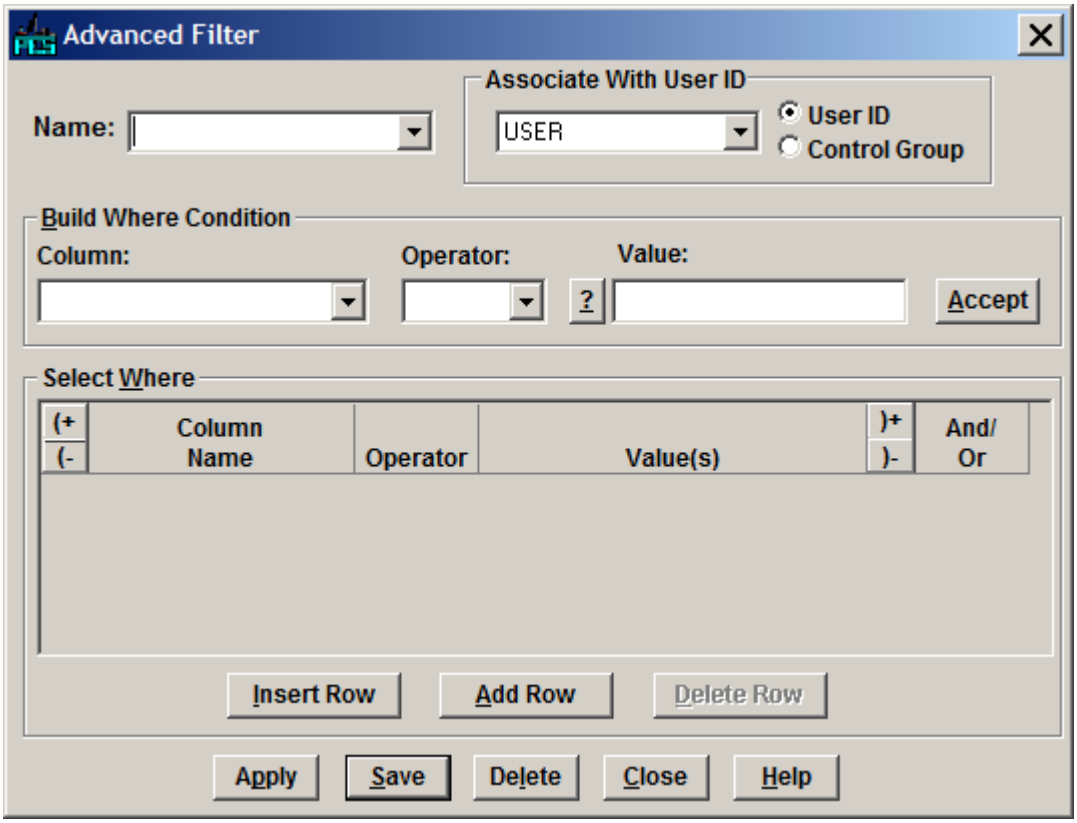
(*Filter Dialog*)

Step	Action	Result
1	Click the **ADVANCED** button.	The **Advanced Filter** dialog will appear.

Continued on Following Page

Customizing the Worksheet View

(continued)



(*Advanced Filter Dialog*)

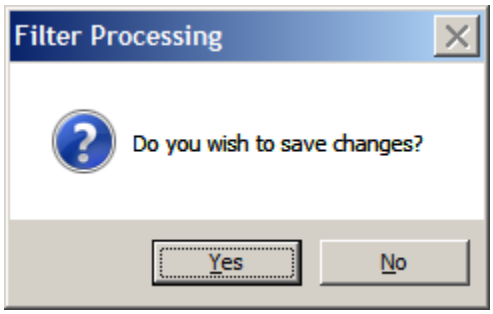
2	Type the **name of the filter** in the **NAME** field.	N/A
3	Select the **column you are filtering by** from the drop-down list in the **COLUMN** field.	N/A
4	Select **an operator** from the drop-down list in the **OPERATOR** field.	N/A
5	Type the **value you wish to filter by** in the **VALUE** field.	N/A
6	Click the **ACCEPT** button.	N/A

Continued on Following Page

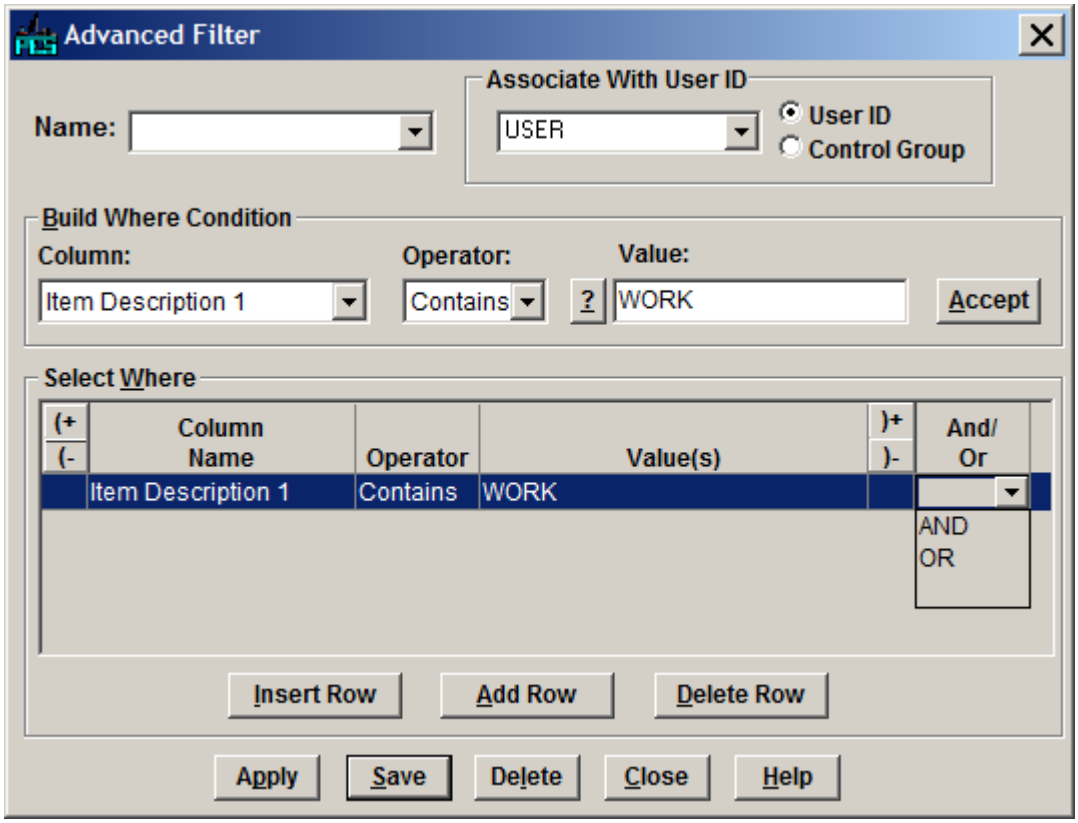
Customizing the Worksheet View

(continued)

7	If this is your only criteria, click the **APPLY** button. If you would like to specify **multiple** criteria, **skip steps 7 & 8**.	The following dialog will appear.



8	Click the **YES** button to save. Click the **NO** button to apply the filter without saving.



Continued on Following Page

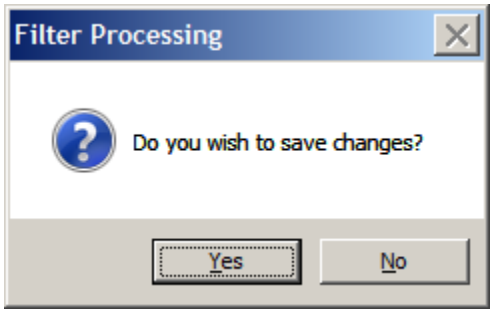
Customizing the Worksheet View

(continued)

9	Select **AND** or **OR** from the drop-down list in the **AND/OR** field.	N/A
10	Click the **ADD ROW** button.	A new row will appear.
11	Select the **column you are filtering by** from the drop-down list in the **COLUMN** field.	N/A
12	Select **an operator** from the drop-down list in the **OPERATOR** field.	N/A
13	Type the **value you wish to filter by** in the **VALUE** field.	N/A
14	Click the **ACCEPT** button.	N/A

For additional criteria, repeat steps 9-14.

15	Click the **APPLY** button.	The following dialog will appear.



16	Click the **YES** button to save. Click the **NO** button to apply the filter without saving.

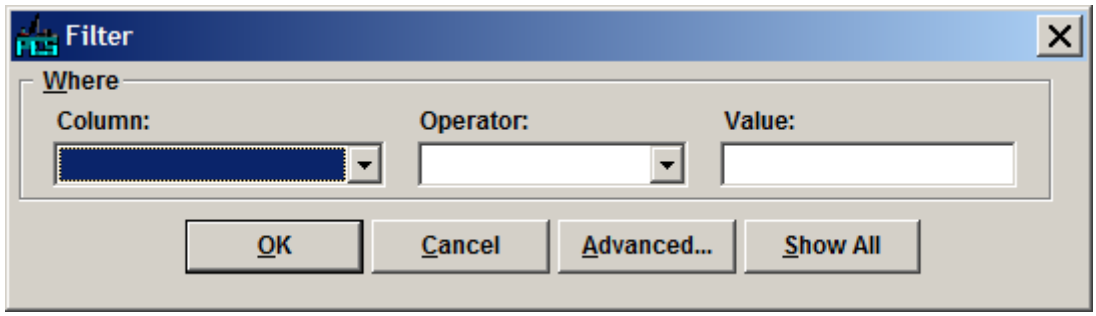
Continued on Following Page

Customizing the Worksheet View

(continued)

Using a Saved Filter

From the **Filter** dialog:

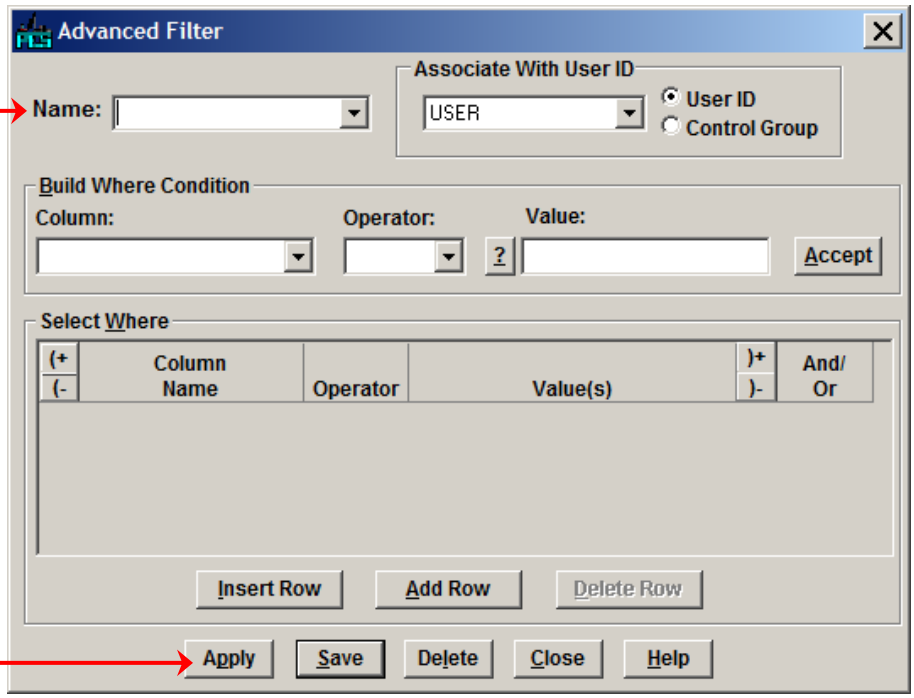


(*Filter Dialog*)

Step	Action	Result
1	Click the **ADVANCED** button.	The **Advanced Filter** dialog will appear.

2. Select the filter name from the drop-down list in the **NAME** field.

3. Click the **APPLY** button.

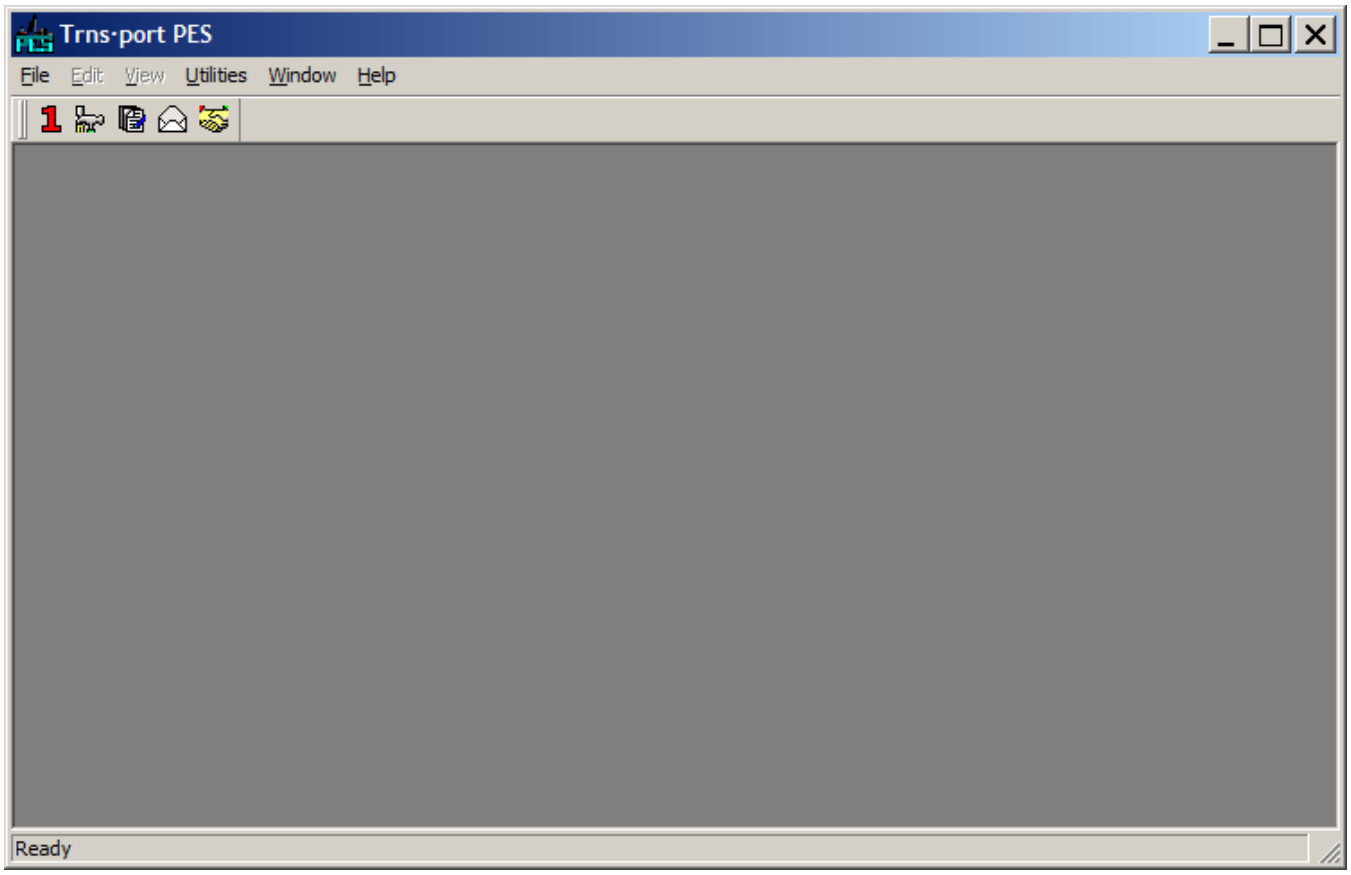


(*Advanced Filter Dialog*)

Chapter 4 Proposal Setup

Setting up a Proposal

Once all line items and quantities have been completely entered, you must create a proposal. Once a proposal is built, it will be ready for final check, final cost estimation, and entering of contract times.



(*Trns•port Proposal and Estimates System Main Window*)

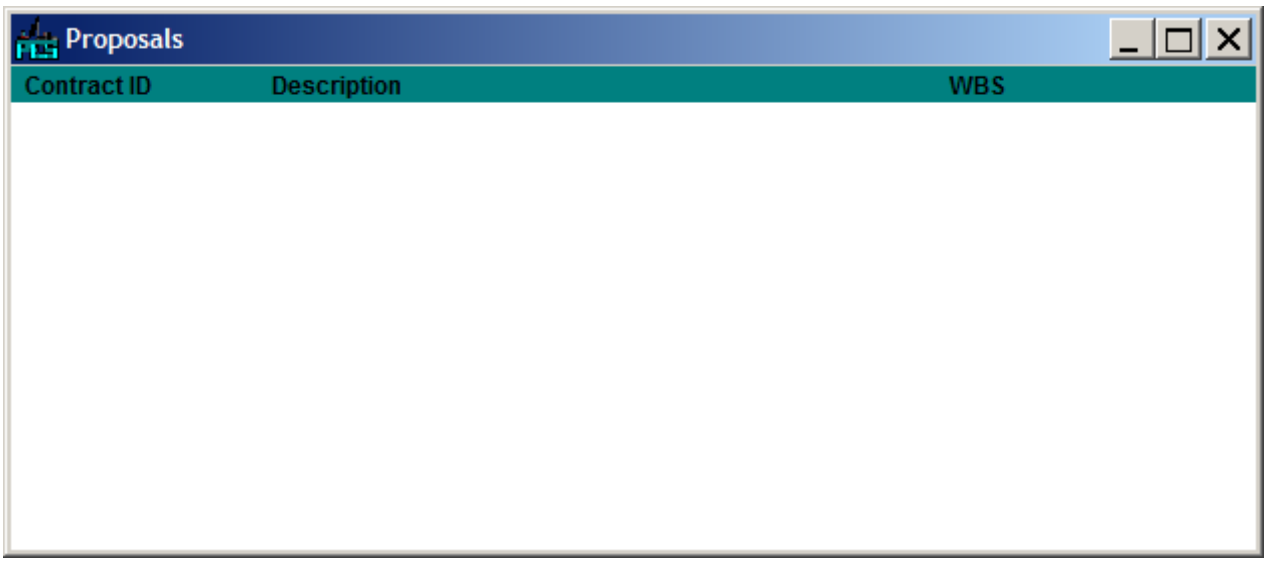
Once you have successfully logged into **Trns•port PES**:

Step	Action	Result
1	Click the **PROPOSALS** button.	The **Proposals** window will appear.

Continued on Following Page

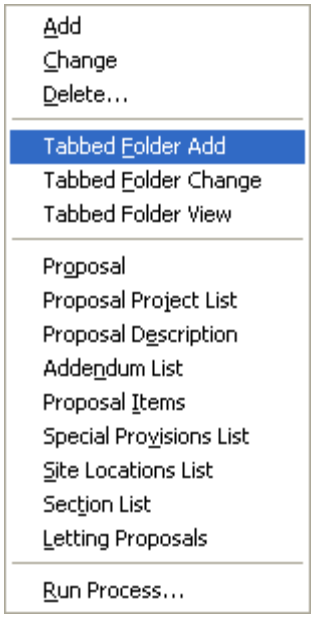
Setting up a Proposal

(continued)



(*Proposals Window*)

2	Right-click anywhere on the **Proposal** window.	A right-click menu will appear.

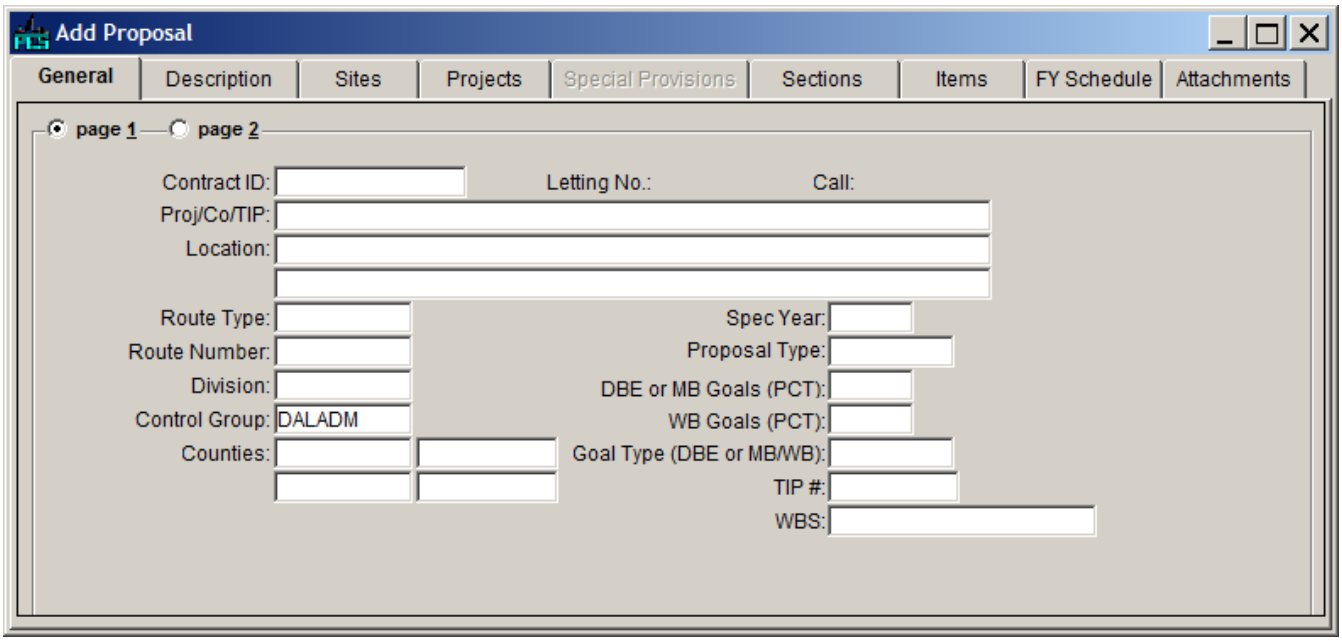


Continued on Following Page

Setting up a Proposal

(continued)

3	Select **TABBED FOLDER ADD** from the menu.	The **Add Proposal** window will appear.



(*Add Proposal Window – General Tab Page 1*)

General Tab

4	Type the **contract number** in the **CONTRACT ID** field.	N/A
5	Type the **WBS number**, **County**, and **TIP number** in the **PROJ/CO/TIP** field.	N/A
6	Type the **location** in the **LOCATION** field.	N/A
7	Select the **type of route** from the drop-down list in the **ROUTE TYPE** field.	N/A
8	Type the **Route number** in the **ROUTE NUMBER** field.	N/A
9	Select the **division number** from the drop-down list in the **DIVISION** field.	N/A

Continued on Following Page

Setting up a Proposal

(continued)

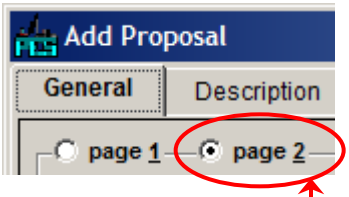
10	Select **D*LADM** from the drop-down list in the **CONTROL GROUP** field. 🗁**NOTE:** The * will be your division letter.	N/A
11	Select the **county** from the drop-down list in the first **COUNTIES** field. 🗁**NOTE:** If there are multiple counties associated with the proposal; select them from the drop-down lists in the additional **COUNTIES** fields.	N/A
12	Select the **specification year** from the drop-down list in the **SPEC YEAR** field.	N/A
13	Select the **type of proposal** from the drop-down list in the **PROPOSAL TYPE** field.	N/A
14	If applicable, type **the DBE or MB goal percentage** in the **DBE OR MB GOALS (PCT)** field.	N/A
15	If applicable, type **the WB goal percentage** in the **WB GOALS (PCT)** field.	N/A
16	Select the **goal type** from the drop-down list in the **GOAL TYPE (DBE OR MB/WB)** field. 🗁**NOTE:** If no goals have been set, select **None**.	N/A
17	If applicable, type the **TIP Number** in the **TIP** field.	N/A

Continued on Following Page

Setting up a Proposal

(continued)

18	Type the **WBS Number** in the **WBS** field.	N/A



19	Click the **PAGE 2** radio button.	**Page 2** of the **General** tab will appear.
20	Select the **resident engineer** from the drop-down list in the **RESIDENT ENGINEER** field.	N/A
21	If applicable, type the **previous contract number** in the **PREV. LET AS CONTID** field.	N/A
22	Type the **type of work** in the **SHORT TYPE OF WORK** field.	N/A

Continued on Following Page

Setting up a Proposal

(continued)

Cluster Indicator

Whenever proposals are clustered for bidding, the projects involved will be copied and the additional suffix "C" appended to the project number (e.g., D00001-RWC).

The cluster indicator is four characters long. The first two characters will identify the cluster group. The last two characters identify the entire cluster sequence (00) or indicate the individual proposals sequentially (beginning with 01).

Cluster Indicator for entire cluster sequence:

XX00

Cluster Indicator for individual proposal within cluster:

XX01

🗁**NOTE:** Once a clustered proposal has been created, any changes to the information in individual projects will also have to be made in the corresponding projects that make up the clustered proposal.

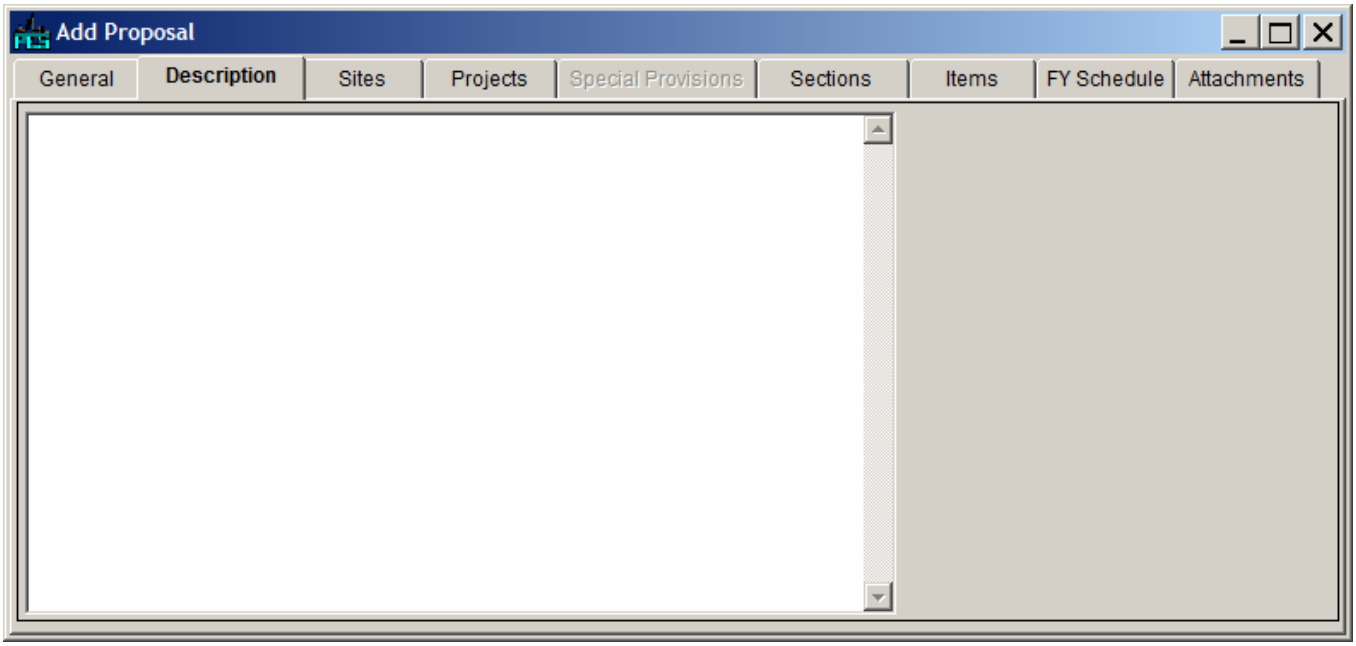
23	If applicable, type the **cluster indicator** in the **CLUSTER INDICATOR** field.	N/A
24	Click the **DESCRIPTION** tab.	The **Description** tab will be brought forward.

Description Tab

Continued on Following Page

Setting up a Proposal

(continued)



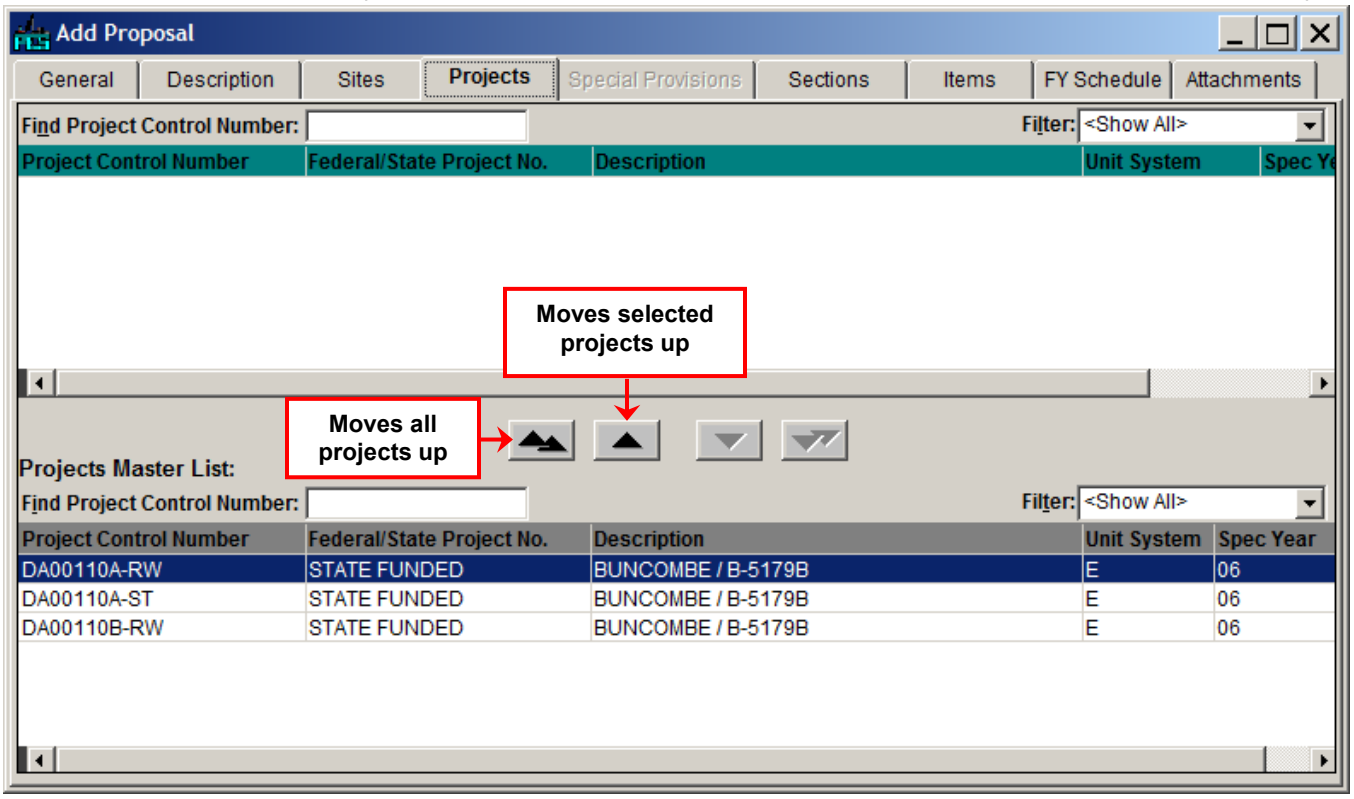
(*Add Proposal Window – Description Tab*)

	25	Type the **description of the proposal** into the large description field provided. 🗁**NOTE:** If you have text copied from another source, you will be able to use the paste command.	N/A
Projects Tab	**26**	Click the **PROJECTS** tab.	The **Projects** tab will be brought forward.

Continued on Following Page

Setting up a Proposal

(continued)



(*Add Proposal Window – Projects Tab*)

27	Select the project(s) you wish to add to the proposal by clicking on them.	N/A

If you would like to select multiple projects at the same time, hold down the Ctrl key and click each project you wish to select.

28	Click the ▲ **ADD SELECTED** button.	The projects will be moved to the top of the window. These projects will be associated with the proposal.

Continued on Following Page

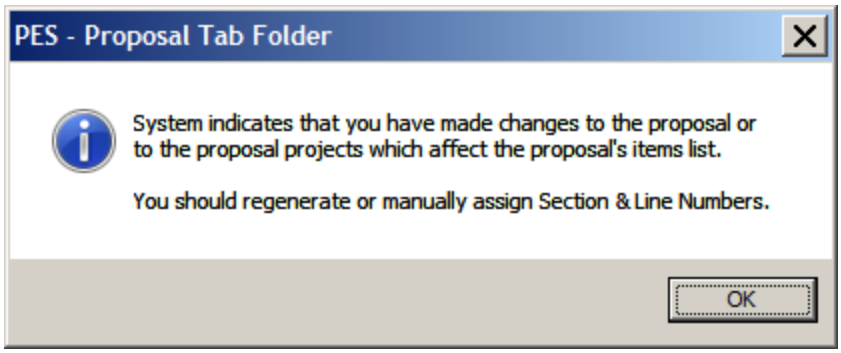
Setting up a Proposal

(continued)

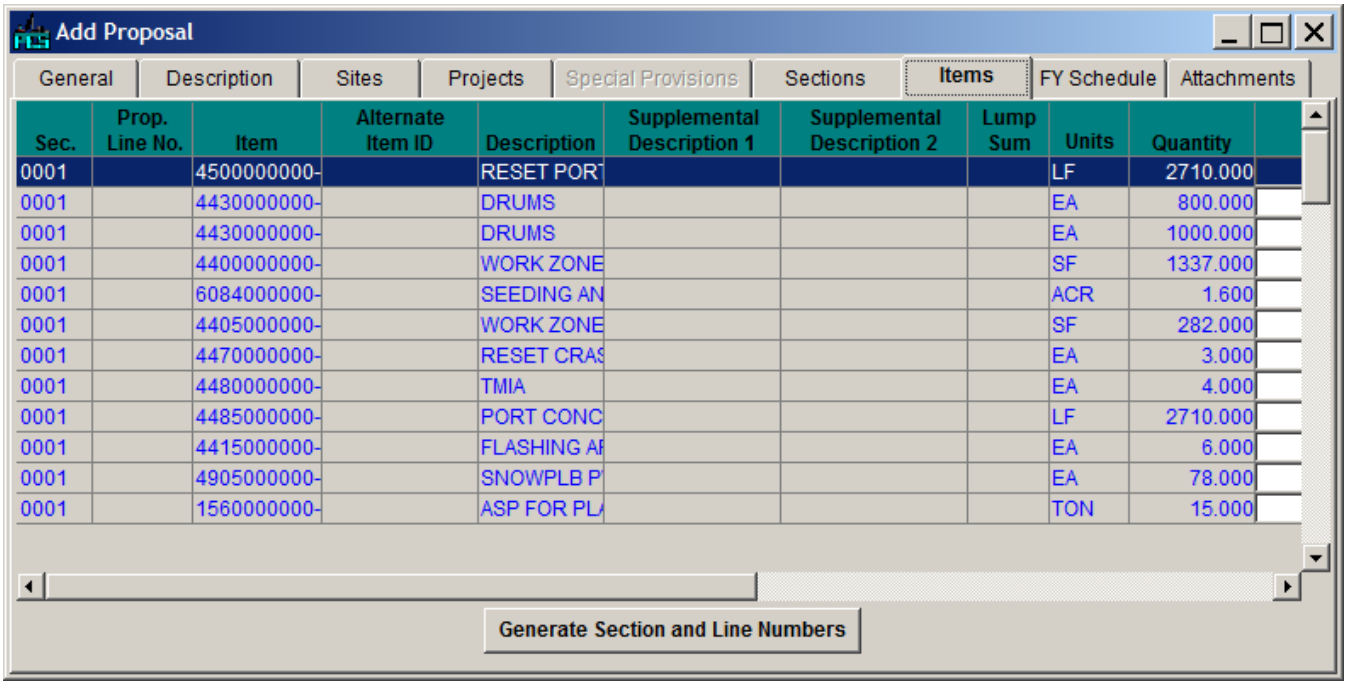
If you have mistakenly moved projects, select the incorrect project in the top pane of the window and click the **REMOVE SELECTED** button.

Items Tab

29	Click the **ITEMS** tab.	The following message will appear.



30	Click the **OK** button.	N/A



Sec.	Prop. Line No.	Item	Alternate Item ID	Description	Supplemental Description 1	Supplemental Description 2	Lump Sum	Units	Quantity
0001		4500000000-		RESET PORT				LF	2710.000
0001		4430000000-		DRUMS				EA	800.000
0001		4430000000-		DRUMS				EA	1000.000
0001		4400000000-		WORK ZONE				SF	1337.000
0001		6084000000-		SEEDING AN				ACR	1.600
0001		4405000000-		WORK ZONE				SF	282.000
0001		4470000000-		RESET CRAS				EA	3.000
0001		4480000000-		TMIA				EA	4.000
0001		4485000000-		PORT CONC				LF	2710.000
0001		4415000000-		FLASHING AI				EA	6.000
0001		4905000000-		SNOWPLB P				EA	78.000
0001		1560000000-		ASP FOR PL				TON	15.000

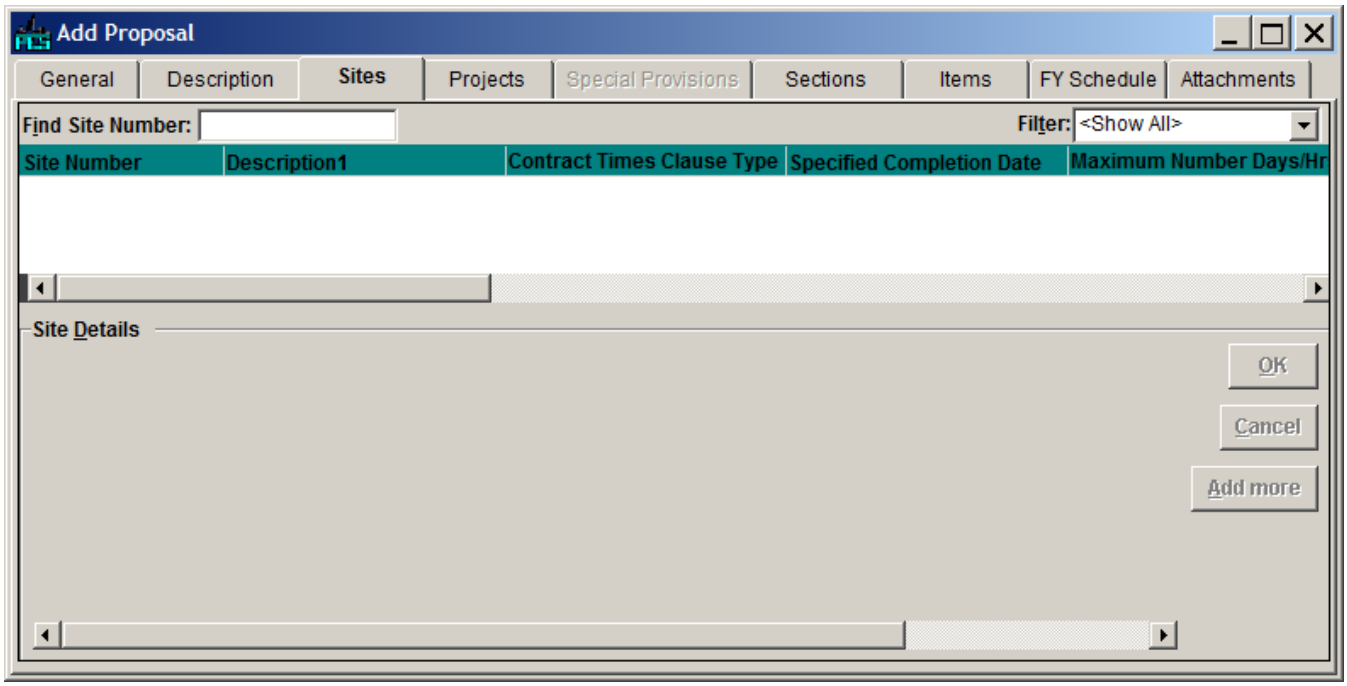
(*Add Proposal Window – Items Tab*)

Continued on Following Page

Setting up a Proposal

(continued)

	31	Click the **GENERATE SECTION AND LINE NUMBERS** button.	The bid items previously entered on the project will appear.
	32	Click the **SAVE FOLDER** button.	The information on the **Items** tab will be saved
Sites Tab	**33**	Click the **Sites** tab.	The **Sites** tab will be brought forward.



(*Add Proposal Window – Sites Tab*)

34	Right-click anywhere in the white space on the **Sites** tab.	A right-click menu will appear.

Continued on Following Page

Setting up a Proposal

(continued)

35	Select **ADD** from the menu.	A blank line will appear highlighted.
36	Type the **site number** in the **SITE NUMBER** field. 🗁**NOTE:** The first site number will be **00** for **Overall Contract Time**. Intermediate items are sequential (01, 02, etc.)	N/A
37	Select the **contract times clause type** from the drop-down list in the **CONTRACT TIMES CLAUSE TYPE** field. 🗁**NOTE:** There are codes for final and intermediate contract times. Choose the appropriate code for your situation.	N/A
38	If applicable, type the **maximum site time** in the **MAXIMUM NUMBER OF DAYS/HRS** field.	N/A
39	Type the **availability date** in the **AVAILABILITY DATE** field. 🗁**NOTE:** If you click the button, a popup calendar will allow you to select the date so that it appears in the field.	N/A

Continued on Following Page

Setting up a Proposal

(continued)

40	If the availability date is a range, type the **ending availability date for the project** in the **END OF AVAILABILITY DATE** field. 🗁**NOTE:** If you click the button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
41	Type the **completion date** in the **SPECIFIED COMPLETION DATE** field. 🗁**NOTE:** If you click the button, a popup calendar will allow you to select the date so that it appears in the field.	
42	If applicable, type the **amount of the bonus** in the **BONUS** field.	N/A
43	Type the **site description** in the **DESCRIPTION1** field. 🗁**NOTE:** If the description is longer than this field will accommodate, use **DESCRIPTION2** for the remainder.	N/A

- If the **SITE NUMBER** is **00**, the description will be **Overall Contract Time**.
- Intermediate items are sequential (01, 02, etc.)
- **Time and Lane Restrictions** should always be last.

44	Type the type the **amount of liquidated damages** in the **LIQUIDATED DAMAGES** field.	N/A
45	Select the **unit** from the drop-down list in the **LIQUIDATED DAMAGES UNIT** field.	N/A

Continued on Following Page

Setting up a Proposal

(continued)

46	If applicable, type the **amount of substantial liquidated damages** in the **SUBSTANTIAL LIQUIDATED DAMAGES AMT** field.	N/A
47	If applicable, type the **start time** in the **START TIME** field.	N/A
48	If applicable, type the **END TIME** in the **END TIME** field.	N/A
49	If you wish to add additional contract times, click the Add More button and repeat steps 36-48. If you are finished adding contract times, click the OK button.	
50	Click the **SAVE FOLDER** button.	The proposal folder will be saved

Additional Methods of Review & Entry

Reviewing Data

The above instructions tell you how and what needs to be entered on the different tabs. The following is a list of recommended additional tasks to perform while setting up proposals.

1	Review any alternate items contained on any projects within the proposal and update alternate IDs as needed to ensure that alternates are combined across projects only when desired.
2	Review the project information (Items, Supplemental Descriptions [checking to ensure combined items roll up together], Force Accounts) and make corrections, if necessary.

Copying From Project to Proposal

You may find it easier to create new proposals by copying from associated projects (within the same contract).

Step	Action	Result
1	Open the associated project.	N/A
2	Open a new proposal.	N/A

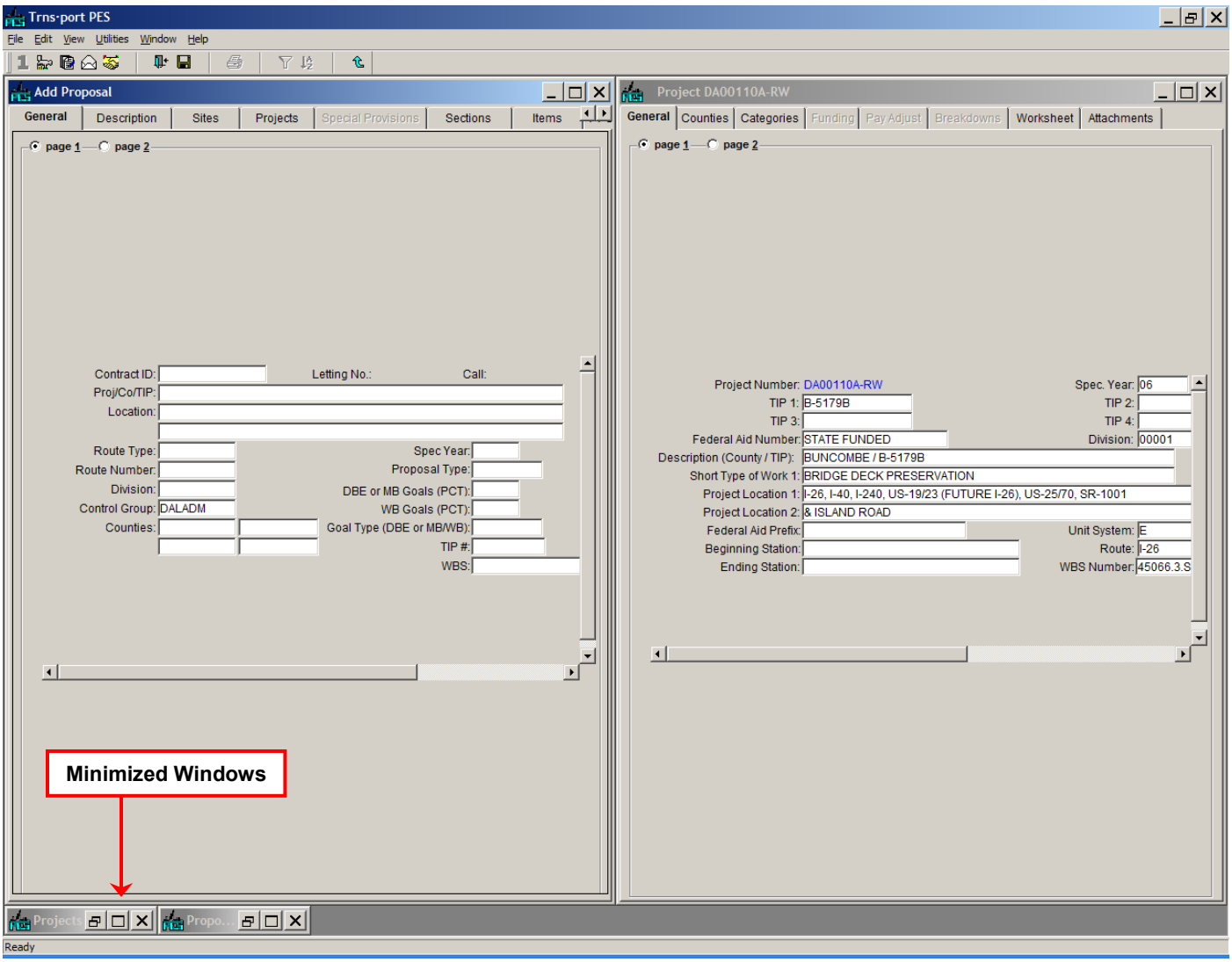
🗁**NOTE:** Make sure all other windows within **Trns•port PES** are minimized except the project and proposal.

3	Select **TILE** from the **WINDOW** drop-down menu.	The **Project** and **Proposal** windows will appear side by side, making it easy to copy information from one to the other.

Continued on Following Page

Additional Methods of Review & Entry

(continued)



You will be able to copy and paste data from one window to the other by using the various methods of copying and pasting.

Select **COPY** and **PASTE** from the **EDIT** drop-down menu.

Use keyboard shortcuts: Ctrl + **C** to copy and Ctrl +**V** to paste.

Chapter 5 Cost Estimation

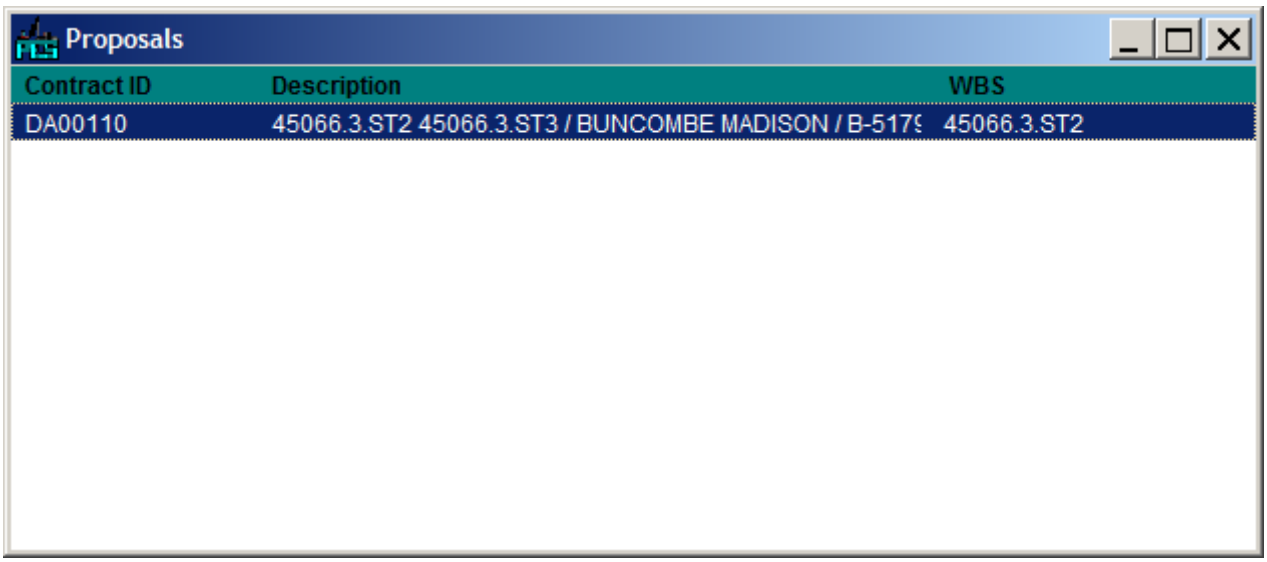
Generating Bid-Based Prices

This process assigns each pay item in the proposal an estimated unit price based on historical information in the system.

By running the process, you will overwrite any previous pricing on all items, unless the **PRICE LOCK** field is set to **Y**.

Once you have successfully logged into **Trns•port PES**:

Step	Action	Result
1	Click the **PROPOSALS** button.	The **Proposals** window will appear.



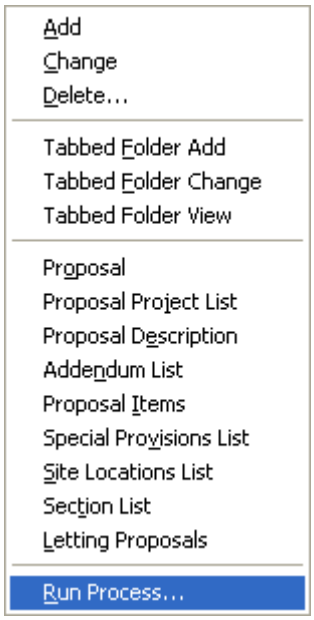
(*Proposals Window*)

2	Right-click on the **proposal number**.	A right-click menu will appear.

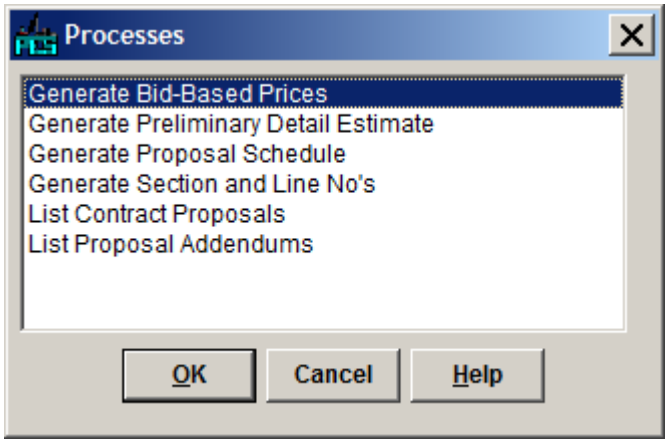
Continued on Following Page

Generating Bid-Based Prices

(continued)



3	Select **RUN PROCESS…** from the menu.	The **Processes** dialog will appear.



(*Processes Dialog*)

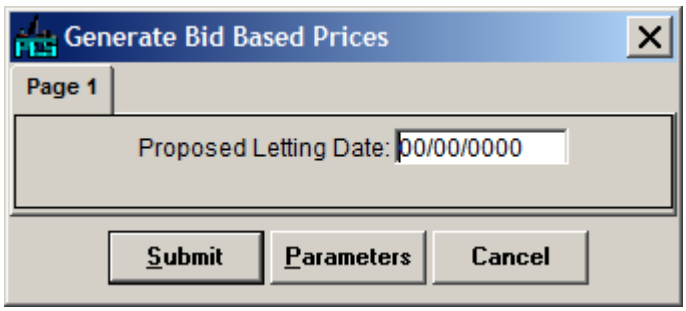
4	Click on **Generate Bid-Based Prices** to select it.	N/A

Continued on Following Page

Generating Bid-Based Prices

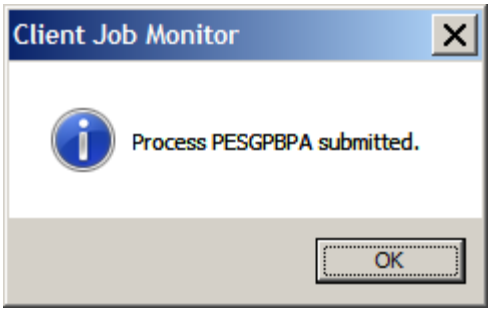
(continued)

5	Click the **OK** button.	The **Generate Bid Based Prices** dialog will appear.



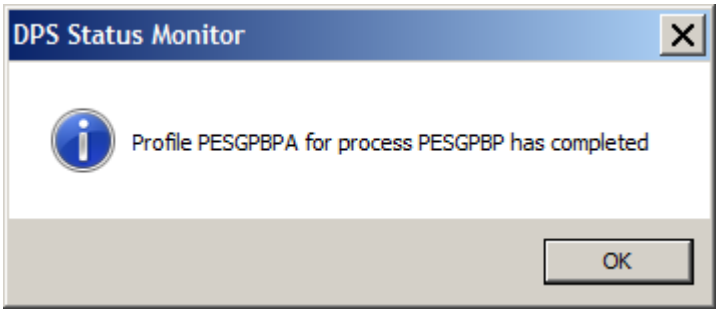
(*Generate Bid Based Prices Dialog*)

6	Click the **SUBMIT** button.	The following message will appear.



7	Click the **OK** button.	The following message will appear.

🗁**NOTE:** This could take several minutes before the process completes.



Continued on Following Page

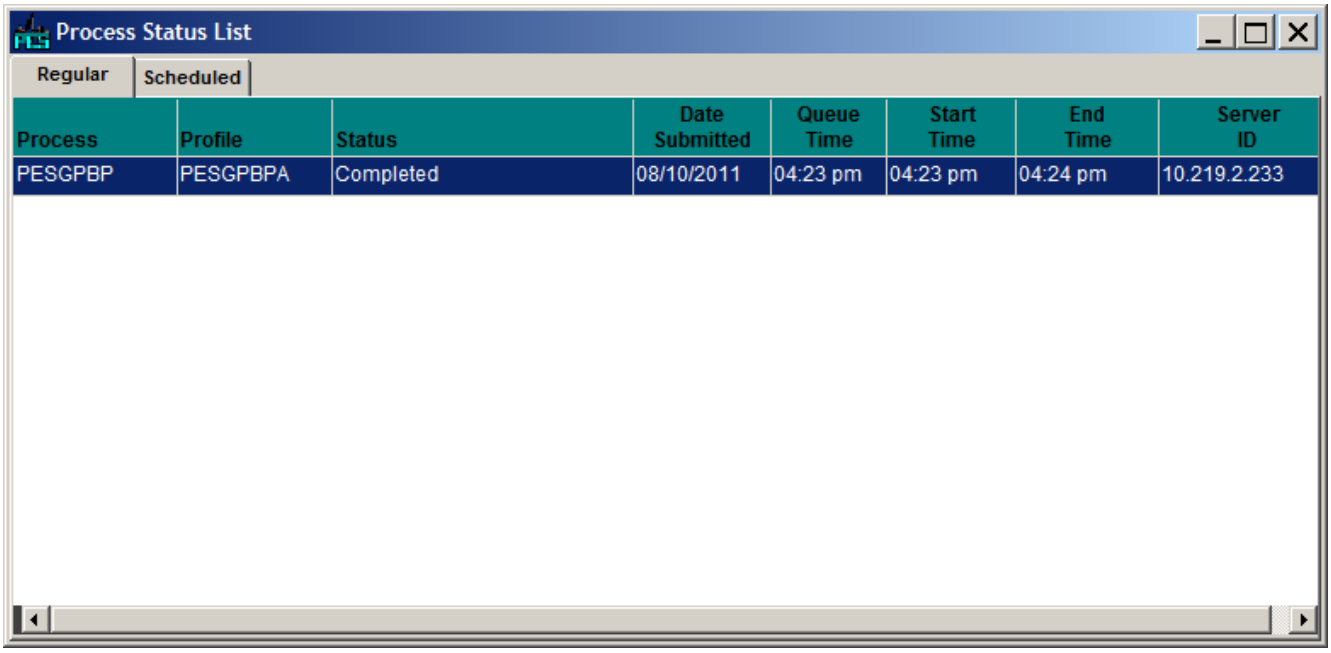
Generating Bid-Based Prices

(continued)

8	Click the **OK** button.	N/A

Once the process has completed, you must determine if it was successful.

9	Select **PROCESS STATUS** from the **FILE** drop-down menu.	The **Process Status List** window will appear.



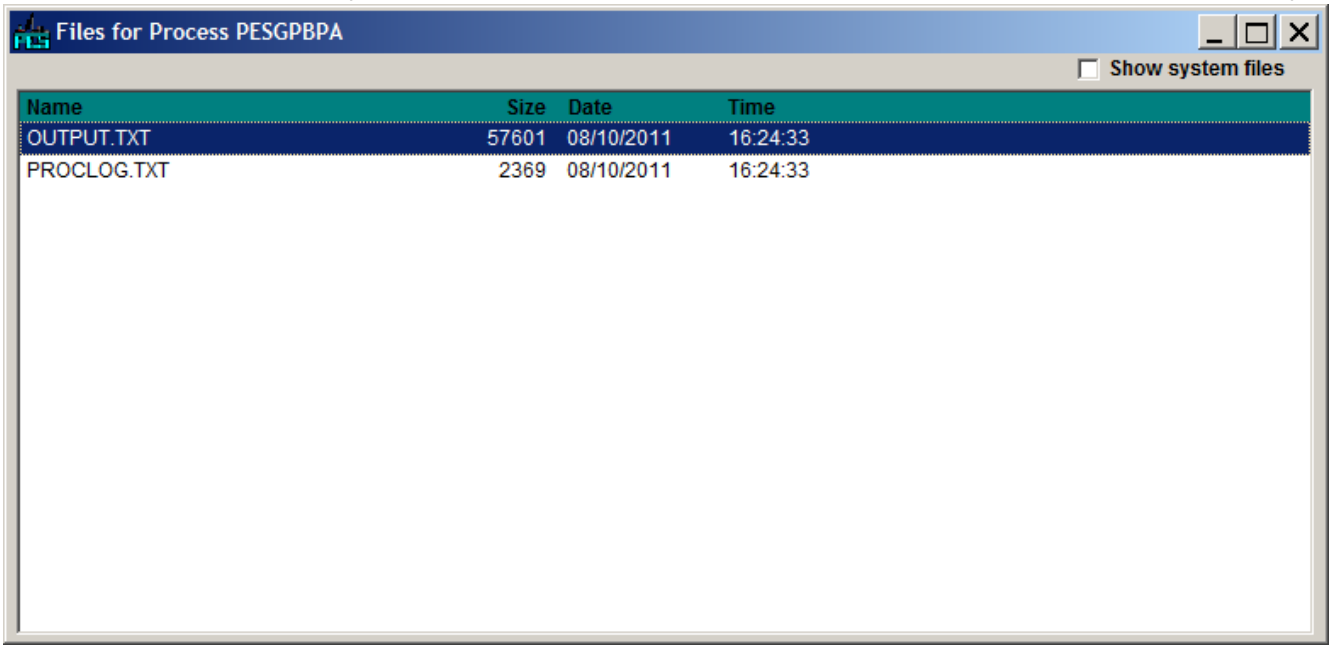
(*Process Status List Window*)

10	Double-click the **process name**.	The **Process File List** window will appear.

Continued on Following Page

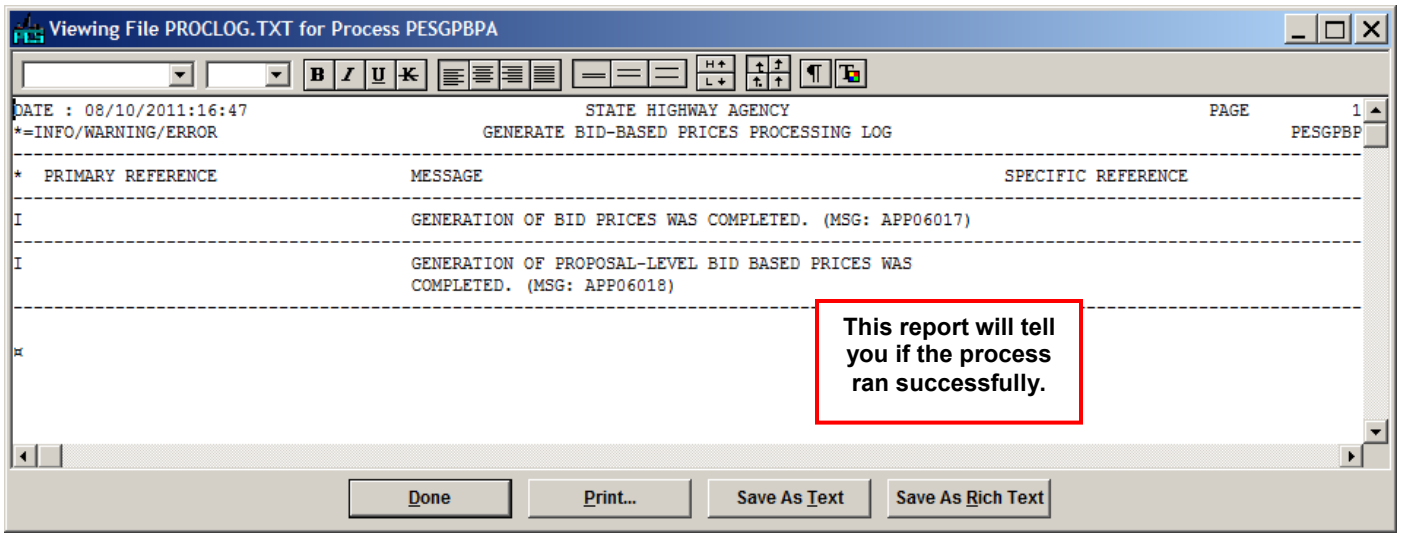
Generating Bid-Based Prices

(continued)



(*Process File List Window*)

11	Double-click the **PROCLOG.TXT** file.	The file will open.



(*PROCLOG.TXT File Window*)

Continued on Following Page

Generating Bid-Based Prices

(continued)

12	Click the **DONE** button.	The file will close and you will return to the **Process File List** window.

🗁**NOTE:** Prices are populated to the associated projects and proposals in the system. This can be viewed through the **Worksheet** tab on the proposal of associated projects.

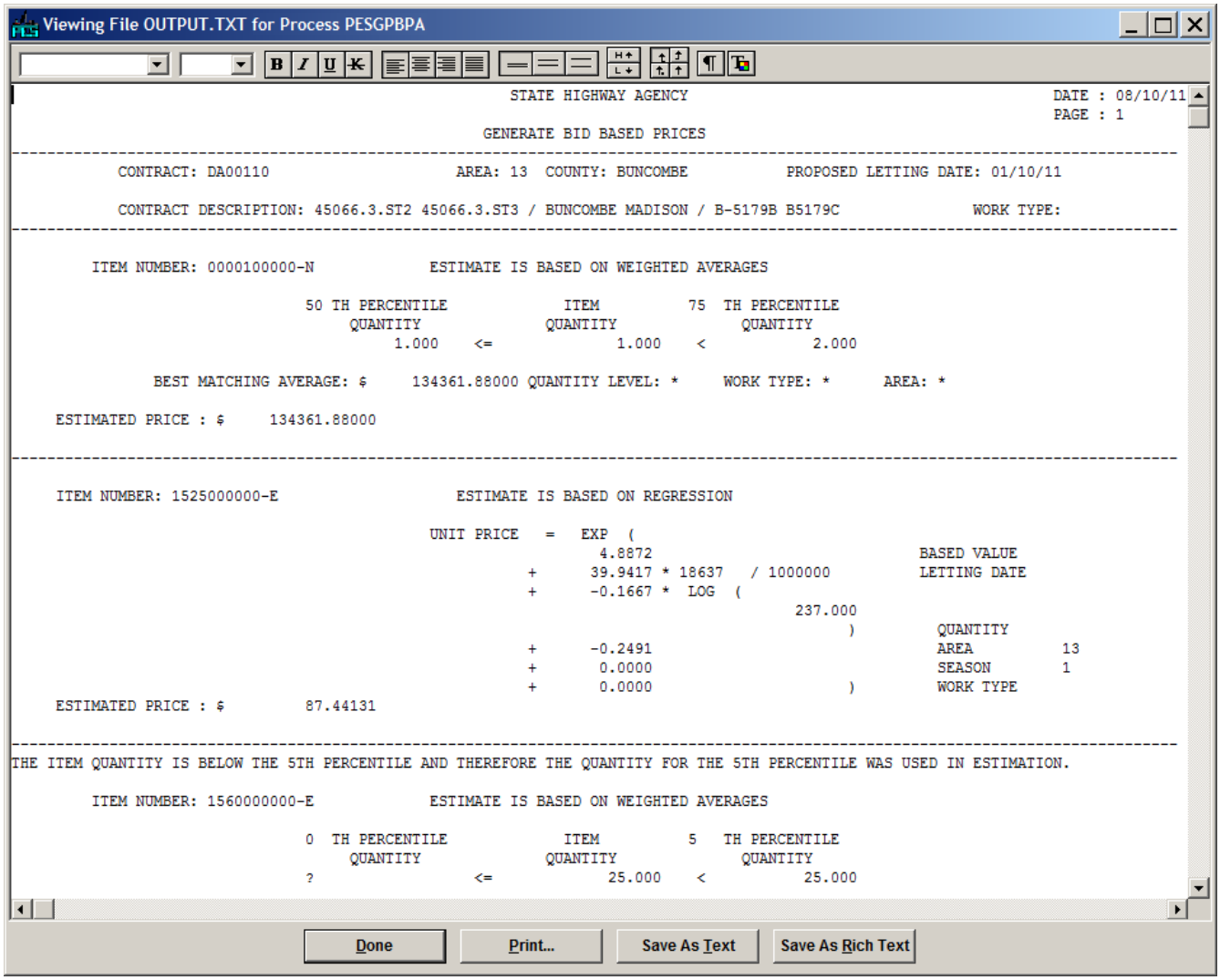
After viewing the **PROCLOG.TXT** file, you may also want to see the **OUTPUT.TXT** file. The **OUTPUT.TXT** file shows what prices were assigned to the pay items and what those price assignments were based on.

13	Double-click the **OUTPUT.TXT** file.	The file will open.

Continued on Following Page

Generating Bid-Based Prices

(continued)



(*OUTPUT.TXT File Window*)

14	Click the **DONE** button.	The file will close and you will return to the **Process File List** window.
15	Close the **Process File List** window.	You will return to the **Process Status List** window.

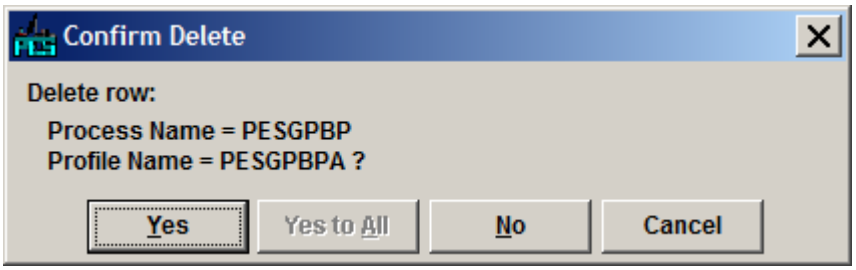
Continued on Following Page

Generating Bid-Based Prices

(continued)

You will need to delete your process from the list.

16	Right-click on the **process name**.	A right-click menu will appear.
17	Select **DELETE** from the menu.	The following message will appear.

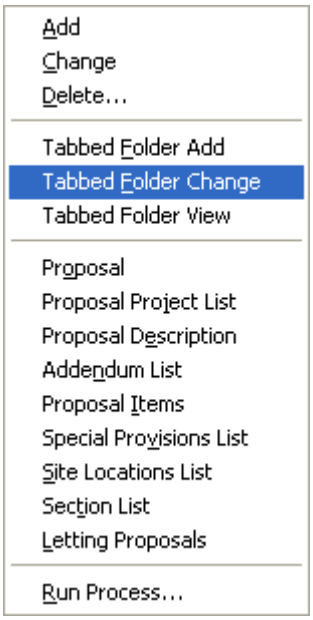


18	Click the **YES** button.	The process will be deleted.
19	Close the **Process Status List** window.	You will return to the **Proposals** window.
20	Right-click on the proposal.	A right-click menu will appear.

Continued on Following Page

Generating Bid-Based Prices

(continued)

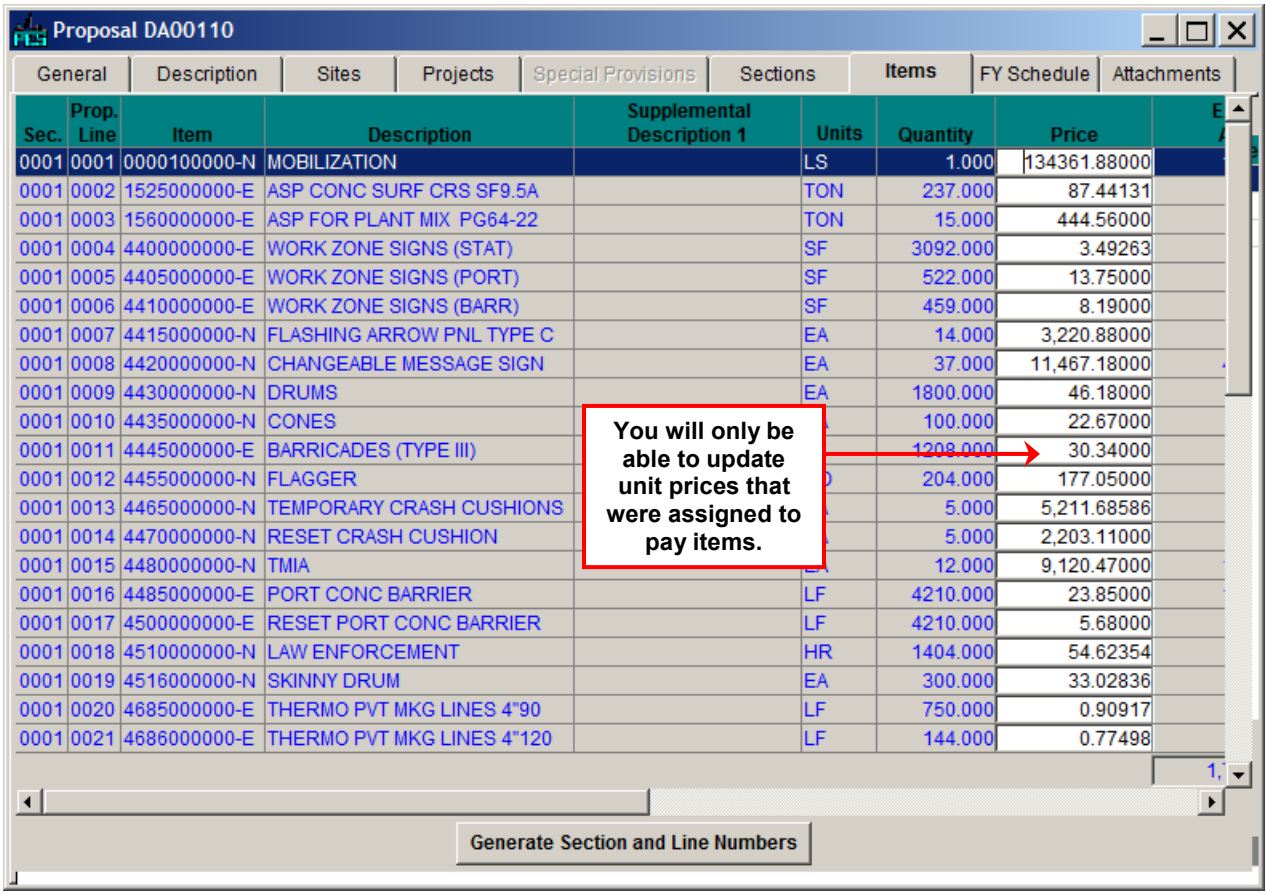


21	Select **TABBED FOLDER CHANGE** from the menu.	The project will open to the **General** tab.
22	Click the **ITEMS** tab.	The **Items** tab will be brought forward.

Continued on Following Page

Generating Bid-Based Prices

(continued)



Sec.	Prop. Line	Item	Description	Supplemental Description 1	Units	Quantity	Price
0001	0001	0000100000-N	MOBILIZATION		LS	1.000	134361.88000
0001	0002	1525000000-E	ASP CONC SURF CRS SF9.5A		TON	237.000	87.44131
0001	0003	1560000000-E	ASP FOR PLANT MIX PG64-22		TON	15.000	444.56000
0001	0004	4400000000-E	WORK ZONE SIGNS (STAT)		SF	3092.000	3.49263
0001	0005	4405000000-E	WORK ZONE SIGNS (PORT)		SF	522.000	13.75000
0001	0006	4410000000-E	WORK ZONE SIGNS (BARR)		SF	459.000	8.19000
0001	0007	4415000000-N	FLASHING ARROW PNL TYPE C		EA	14.000	3,220.88000
0001	0008	4420000000-N	CHANGEABLE MESSAGE SIGN		EA	37.000	11,467.18000
0001	0009	4430000000-N	DRUMS		EA	1800.000	46.18000
0001	0010	4435000000-N	CONES			100.000	22.67000
0001	0011	4445000000-E	BARRICADES (TYPE III)			1208.000	30.34000
0001	0012	4455000000-N	FLAGGER			204.000	177.05000
0001	0013	4465000000-N	TEMPORARY CRASH CUSHIONS			5.000	5,211.68586
0001	0014	4470000000-N	RESET CRASH CUSHION			5.000	2,203.11000
0001	0015	4480000000-N	TMIA			12.000	9,120.47000
0001	0016	4485000000-E	PORT CONC BARRIER		LF	4210.000	23.85000
0001	0017	4500000000-E	RESET PORT CONC BARRIER		LF	4210.000	5.68000
0001	0018	4510000000-N	LAW ENFORCEMENT		HR	1404.000	54.62354
0001	0019	4516000000-N	SKINNY DRUM		EA	300.000	33.02836
0001	0020	4685000000-E	THERMO PVT MKG LINES 4"90		LF	750.000	0.90917
0001	0021	4686000000-E	THERMO PVT MKG LINES 4"120		LF	144.000	0.77498

(*Items Tab*)

Note that the prices are entered to five decimal places.

23	Review the unit prices of the pay items, changing the prices at your discretion.	N/A
24	Click the SAVE FOLDER button.	Your changes will be saved.

If you need to add, delete, or change pay items, you must do so at the project level. These options will be explained in a following section.

NOTE: After making any changes at the project level, you must generate section and line numbers at the proposal level again.

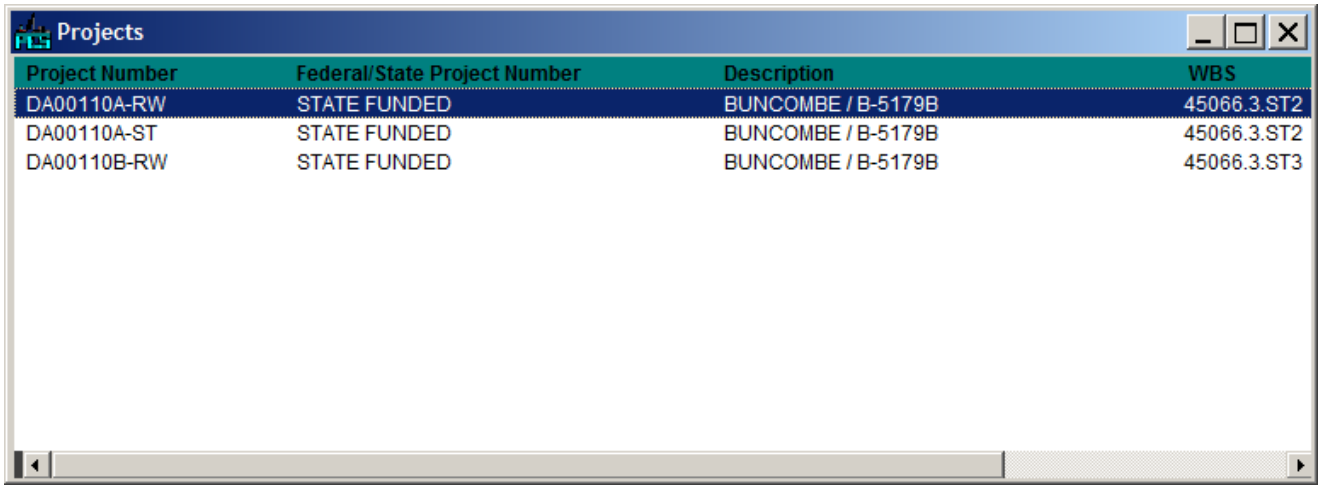
Locking In Prices

You will be responsible for the final costs associated with every pay item in a proposal. With the **Generate Bid Based Prices** process, an average cost was entered for the pay items. Once you have decided on a final cost for a line item, you have the ability to ***lock in*** that price.

Although, you can change a price manually later if necessary, you should perform this procedure once you are satisfied with a price.

Once you have successfully logged into **Trns•port PES**:

Step	Action	Result
1	Click the **PROJECTS** button.	The **Projects** window will appear.



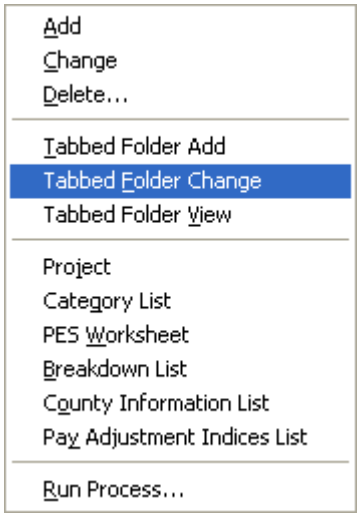
(*Projects Window*)

2	Right-click on the **project you wish to edit**. **NOTE:** See **Finding the Project Estimate Template** on page **2-32** to locate the project.	A right-click menu will appear.

Continued on Following Page

Locking In Prices

(continued)



3	Select **TABBED FOLDER CHANGE** from the menu.	The project will open to the **General** tab.
4	Click the **WORKSHEET** tab.	The **Worksheet** tab will be brought forward.

Continued on Following Page

Locking In Prices

(continued)

Project DA00110A-RW

General | Counties | Categories | Funding | Pay Adjust | Breakdowns | **Worksheet** | Attachments

Find Project Item Line Number: Filter: <Show All>

Category Number	Breakdown ID	Item Number	Description	Units	Estimated Unit Price	Breakdown Item Quantity	Extended Amount	Price Lock Flag
0001	0001	4400000000-E	WORK ZONE SIGNS (STAT)	SF	3.49263	1,337.000	4,669.646	N
0001	0001	4405000000-E	WORK ZONE SIGNS (PORT)	SF	13.75000	240.000	3,300.000	N
0001	0001	4410000000-E	WORK ZONE SIGNS (BARR)	SF	8.19000	347.000	2,841.930	N
0001	0001	4415000000-N	FLASHING ARROW PNL TYPE C	EA	3,220.88000	6.000	19,325.280	N
0001	0001	4420000000-N	CHANGEABLE MESSAGE SIGN	EA	11,467.18000	22.000	252,277.960	N
0001	0001	4430000000-N	DRUMS	EA	46.18000	800.000	36,944.000	N
0001	0001	4435000000-N	CONES	EA	22.67000	100.000	2,26	
0001	0001	4445000000-E	BARRICADES (TYPE III)	LF	30.34000	1,032.000	31,31	
0001	0001	4455000000-N	FLAGGER	MD	177.05000	4.000	70	
0001	0001	4465000000-N	TEMPORARY CRASH CUSHIONS	EA	5,211.68586	2.000	10,423.372	N
0001	0001	4470000000-N	RESET CRASH CUSHION	EA	2,203.11000	2.000	4,406.220	N
0001	0001	4480000000-N	TMIA	EA	9,120.47000	8.000	72,963.760	N
0001	0001	4485000000-E	PORT CONC BARRIER	LF	23.85000	1,500.000	35,775.000	N
0001	0001	4500000000-E	RESET PORT CONC BARRIER	LF	5.68000	1,500.000	8,520.000	N
0001	0001	4510000000-N	LAW ENFORCEMENT	HR	54.62354	864.000	47,194.739	N
0001	0001	4810000000-E	PAINT PVMT MARKINGS 4"	LF	0.14000	16,013.000	2,241.820	N
0001	0001	4820000000-E	PAINT PVMT MARKINGS 8"	LF	0.50000	800.000	400.000	N
0001	0001	4905000000-N	SNOWPLB PVMT MRKER	EA	50.54194	58.000	2,931.433	N

538,501.239

Price Lock Flag Field

(*Worksheet Tab*)

5	For each pay item you wish to lock the price of, type a **Y** in the **PRICE LOCK FLAG** field.	N/A
6	Click the **SAVE FOLDER** button.	Your changes will be saved.

Chapter 6 Letting Setup

Updating Project Control at the Project Level

When the project is ready to advertise (the proposals have been finalized), the estimator must pass the proposals to the letting administrator (if this is a separate person in your office) to set up a letting in Trns•port.

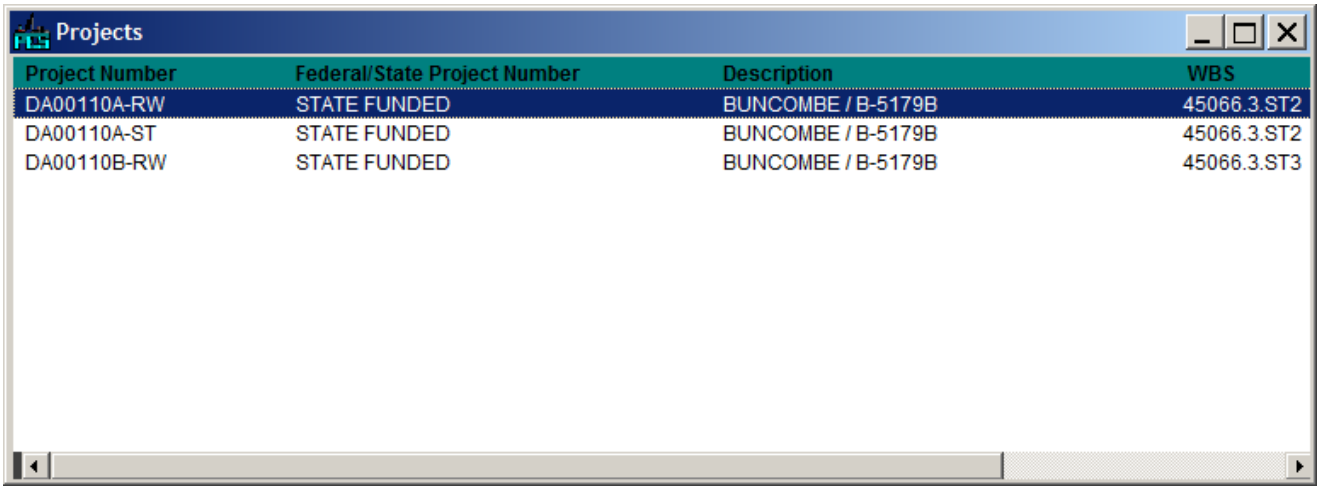
🗁**NOTE:** You will not be able to view or access the project after performing this procedure if you are not the Letting Administrator.

To change control settings, perform these instructions on each project that will be in the letting:

🗁**NOTE:** This must be done both at the **Project** and at the **Proposal** level

Once you have successfully logged into **Trns•port PES**:

Step	Action	Result
1	Click the **PROJECTS** button.	The **Projects** window will appear.



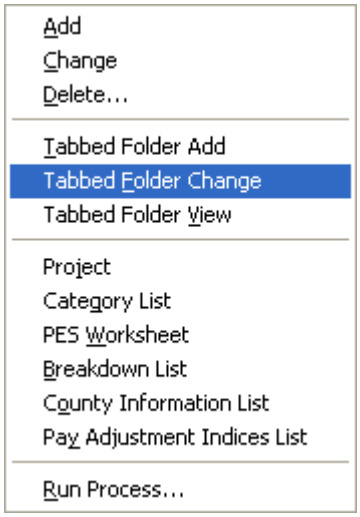
(*Projects Window*)

2	Right-click on the **project number**. 🗁**NOTE:** See **Finding the Project Estimate Template** on page **2-32** to locate the project.	A right-click menu will appear.

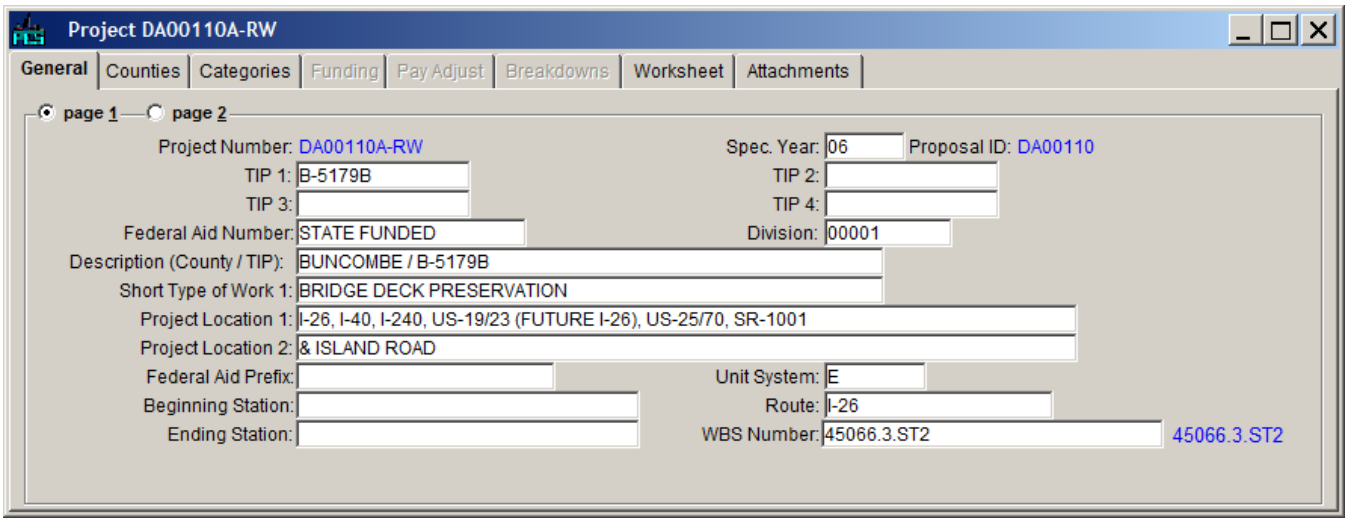
Continued on Following Page

Updating Project Control at the Project Level

(continued)



3	Select **TABBED FOLDER CHANGE** from the menu.	The project will open to the **General** tab.



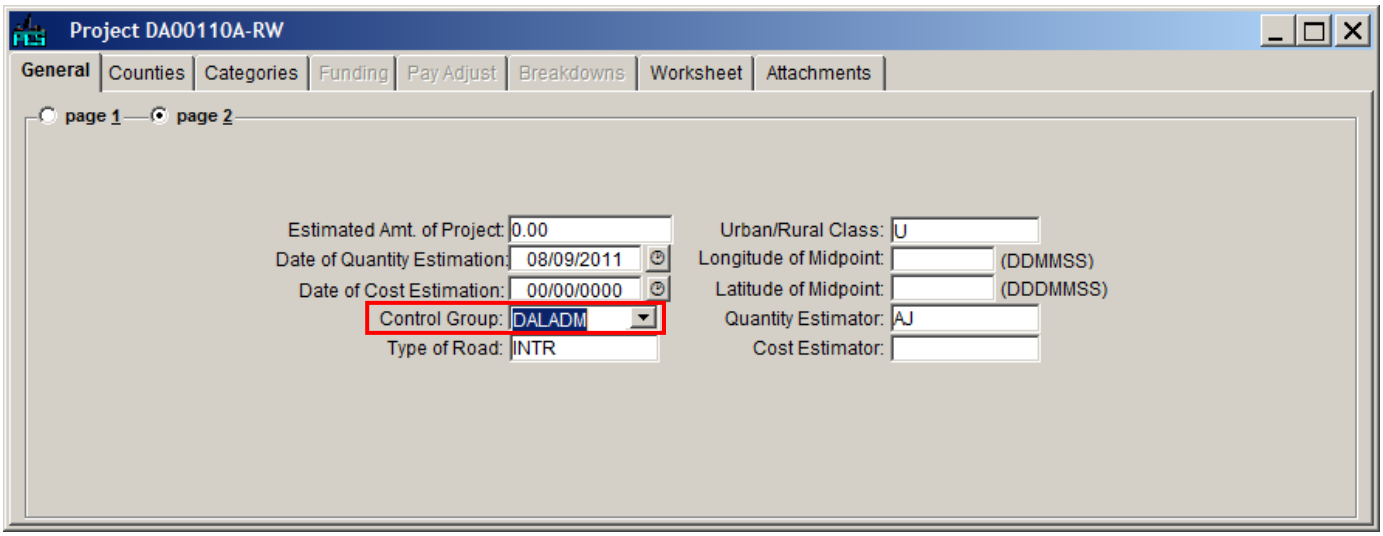
(*Project Window – General Tab*)

Continued on Following Page

Updating Project Control at the Project Level

(continued)

4	Click the **PAGE 2** radio button.	**Page 2** of the **General** tab will appear.



(*Project Window – General Tab Page 2*)

5	Select **D*LADM** from the drop-down list in the **CONTROL GROUP** field. **NOTE:** The * will be your division letter.	N/A
6	Click the **SAVE FOLDER** button.	Your changes will be saved.

Repeat this process for all projects in this proposal.

When you are ready to advertise, changing the **CONTROL GROUP** to **D*LADM** will make this information accessible only to the **Letting Administrator**.

Updating Project Control at the Proposal Level

When the project is ready to advertise (the proposals have been finalized), the estimator must pass the proposals to the letting administrator (if this is a separate person in your office) to set up a letting in Trns•port.

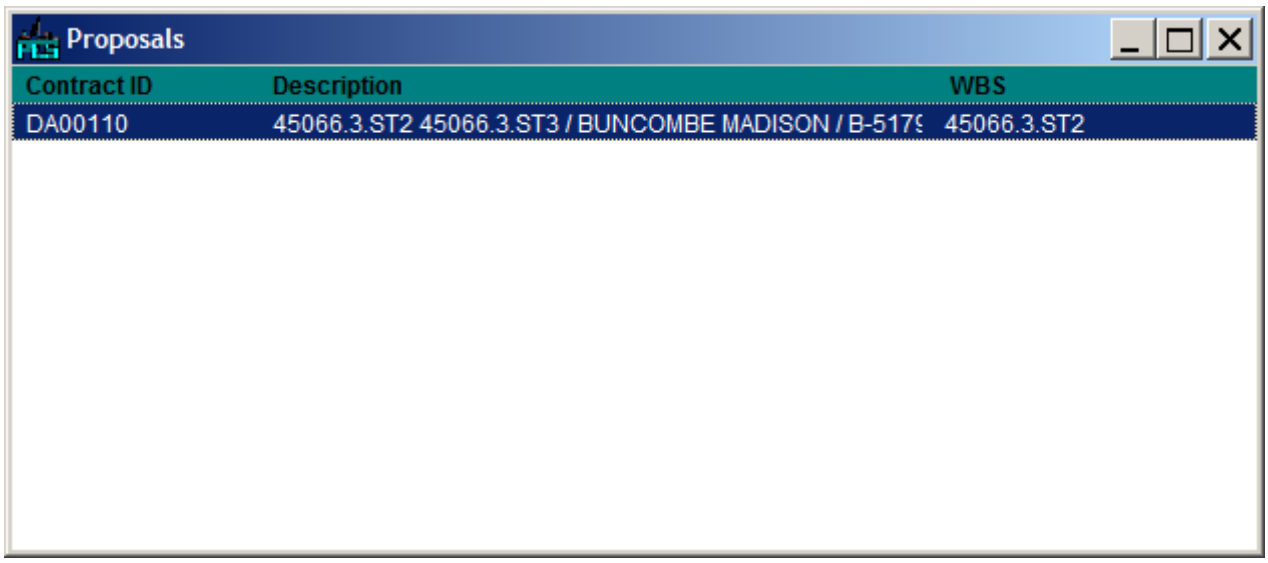
NOTE: You will not be able to view or access the project after performing this procedure if you are not the Letting Administrator.

To change control settings, perform these instructions on each proposal that will be in the letting:

NOTE: This must be done both at the **Project** and at the **Proposal** level

Once you have successfully logged into **Trns•port PES**:

Step	Action	Result
1	Click the **PROPOSALS** button.	The **Proposals** window will appear.



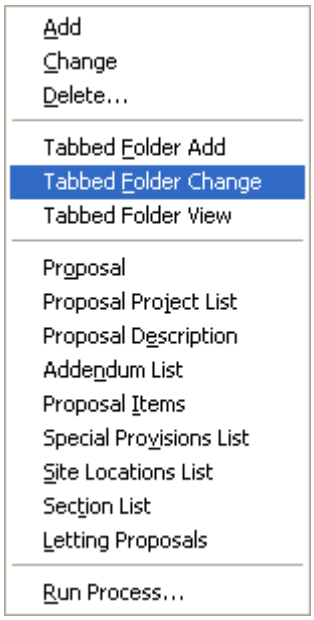
(*Proposals Window*)

2	Right-click on the **proposal number**.	A right-click menu will appear.

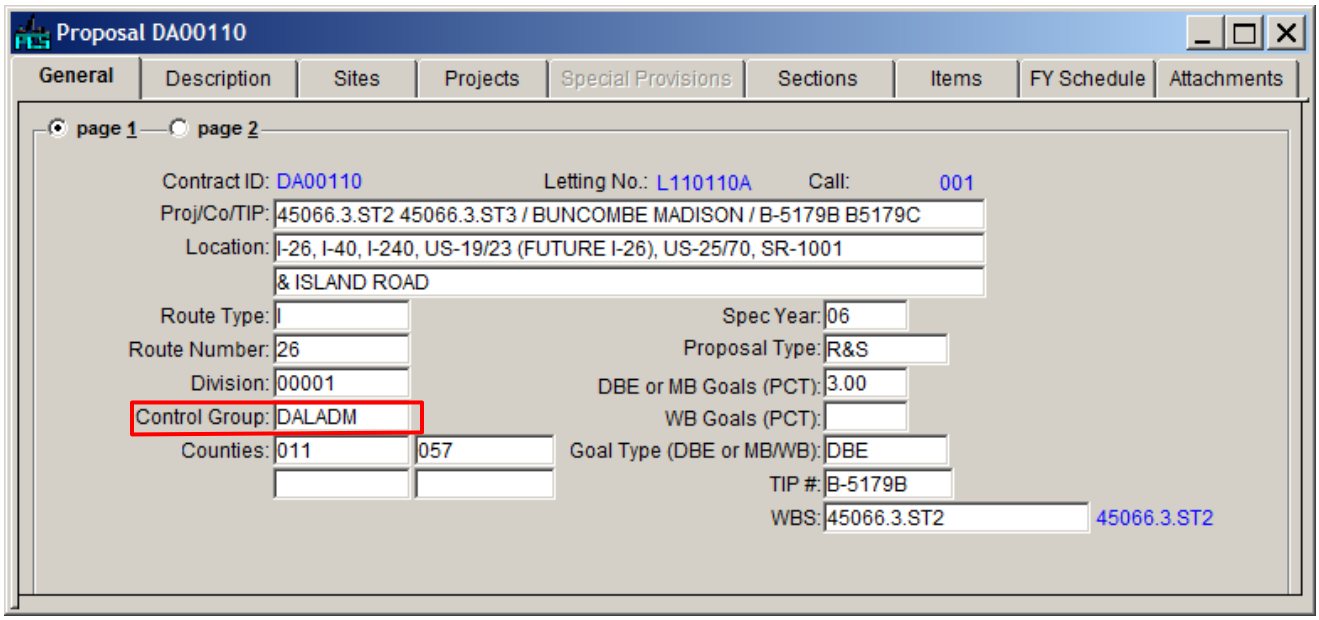
Continued on Following Page

Updating Project Control at the Proposal Level

(continued)



3	Select **Tabbed Folder Change** from the menu.	The proposal will open to the **General** tab.



(Proposal Window – General Tab)

Continued on Following Page

Updating Project Control at the Proposal Level

(continued)

4	Select **D*LADM** from the drop-down list in the **CONTROL GROUP** field. 🗁**NOTE:** The * will be your division letter.	N/A
5	Click the **SAVE FOLDER** button.	Your changes will be saved.

Repeat this process for all proposals in this letting.

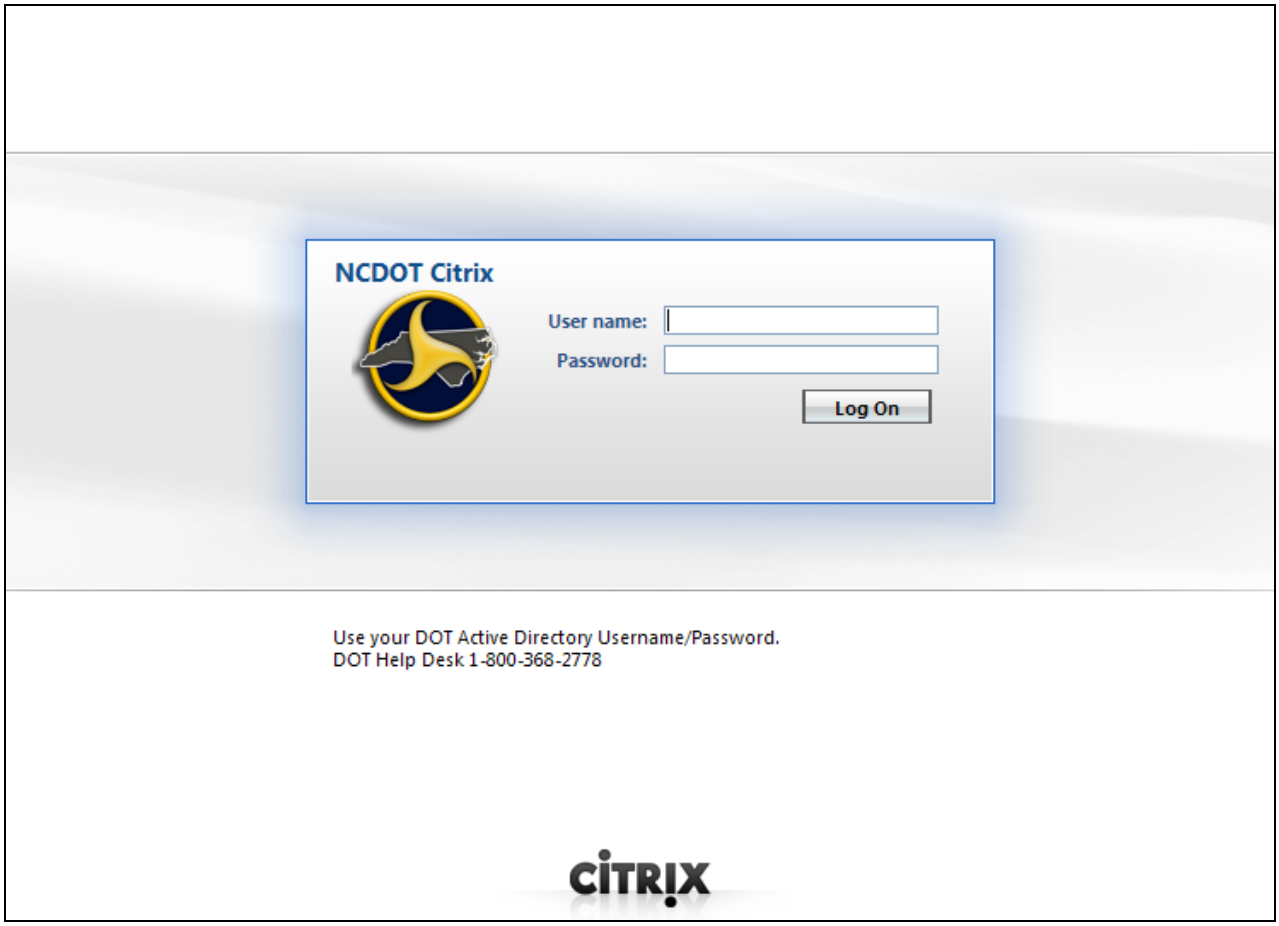
When you are ready to advertise these proposals, changing the **CONTROL GROUP** to **D*LADM** will make them accessible only to the **Letting Administrator**.

Setting Up a Bid Letting

At the time of advertisement:

Logging Into Citrix

Step	Action	Result
1	Open your web browser.	N/A
2	Type https://gateway.dot.state.nc.us in the address bar.	
3	Click the button or press Enter.	The **Citrix Login Page** will appear.



(*Citrix Login Page*)

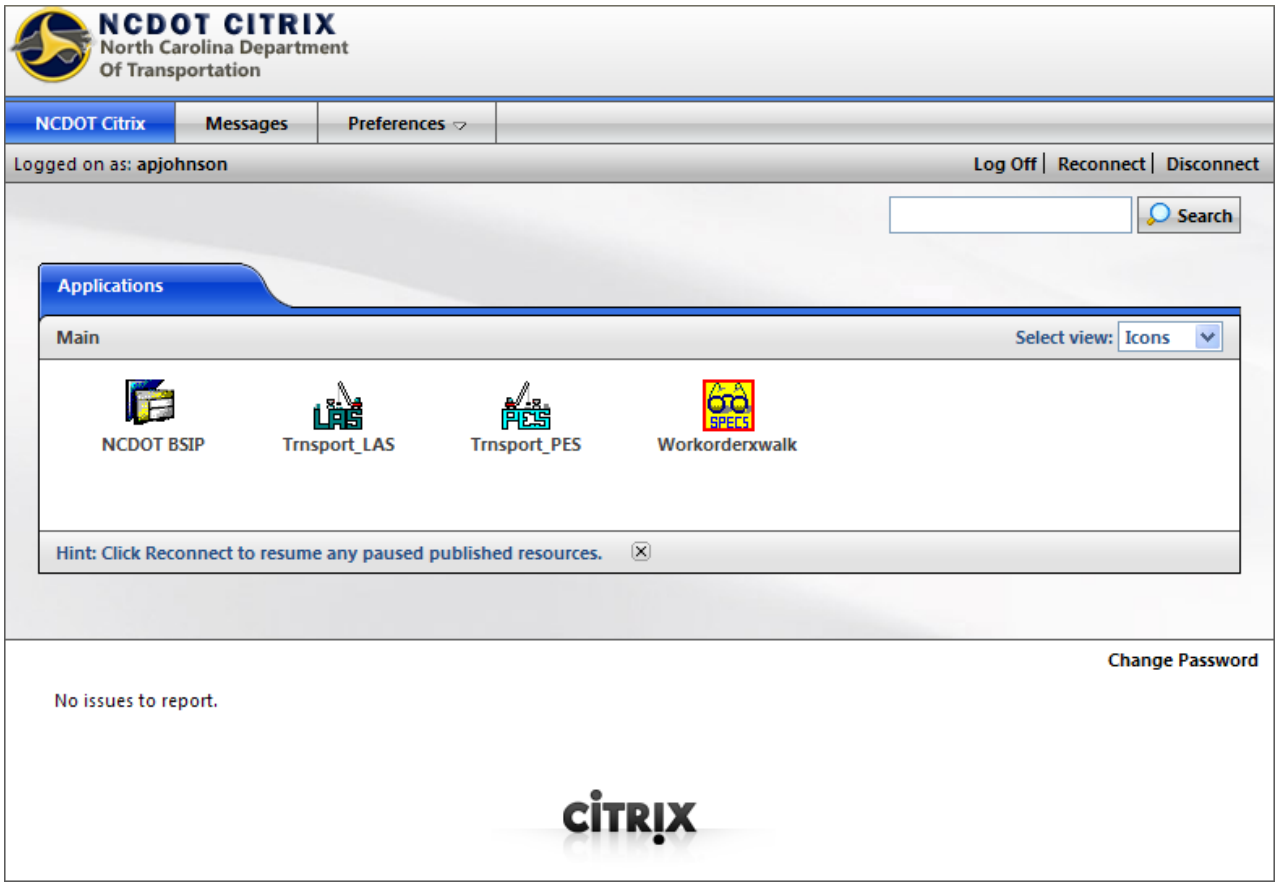
4	Type your **user name** in the **USER NAME** field.	N/A

Continued on Following Page

Setting Up a Bid Letting

(continued)

5	Type your **password** in the **PASSWORD** field.	N/A
6	Click the **LOG ON** button.	The **Citrix Main Window** will appear.



(*Citrix Main Window*)

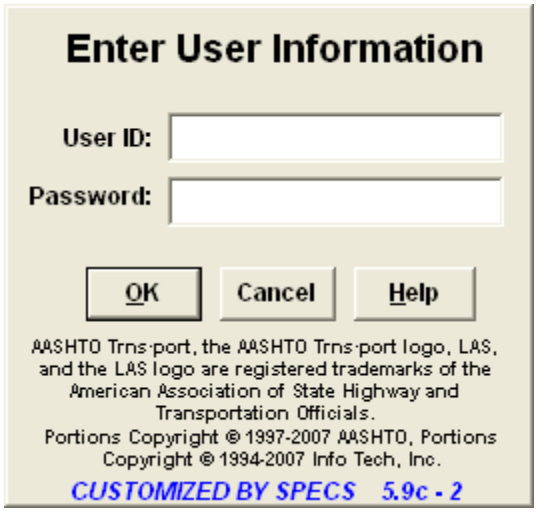
Logging Into the Trns•port LAS Application

7	Click the **TRNSPORT_LAS** icon. Trnsport_LAS	The **Trns•port LAS Logon** dialog box will appear.

Continued on Following Page

Setting Up a Bid Letting

(continued)



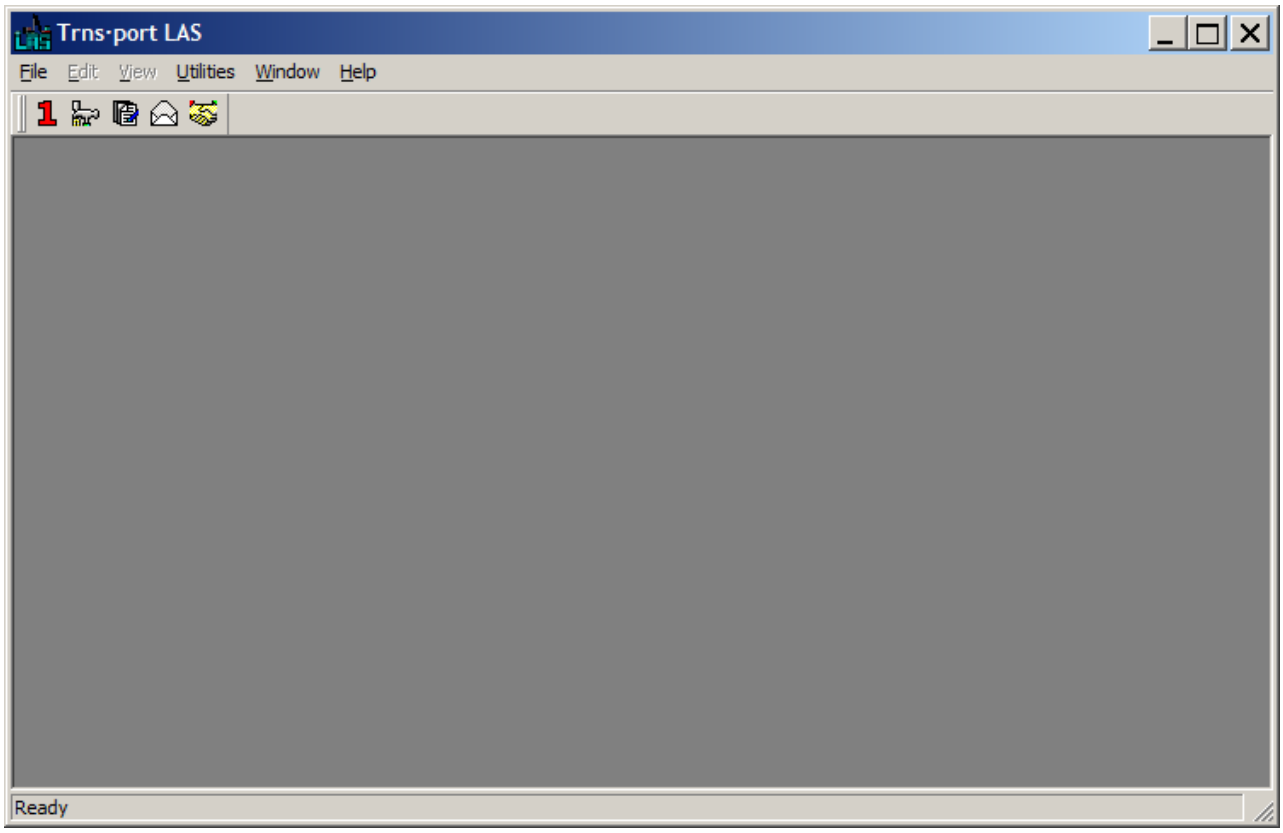
(*Trns•port LAS Logon Dialog Box*)

8	Type your ***User ID*** in the **USER ID** field.	N/A
9	Type your ***password*** in the **PASSWORD** field.	N/A
10	Click the **OK** button.	The **Trns•port Letting and Awards System** main window will appear.

Continued on Following Page

Setting Up a Bid Letting

(continued)



(*Trns•port Letting and Awards System Main Window*)

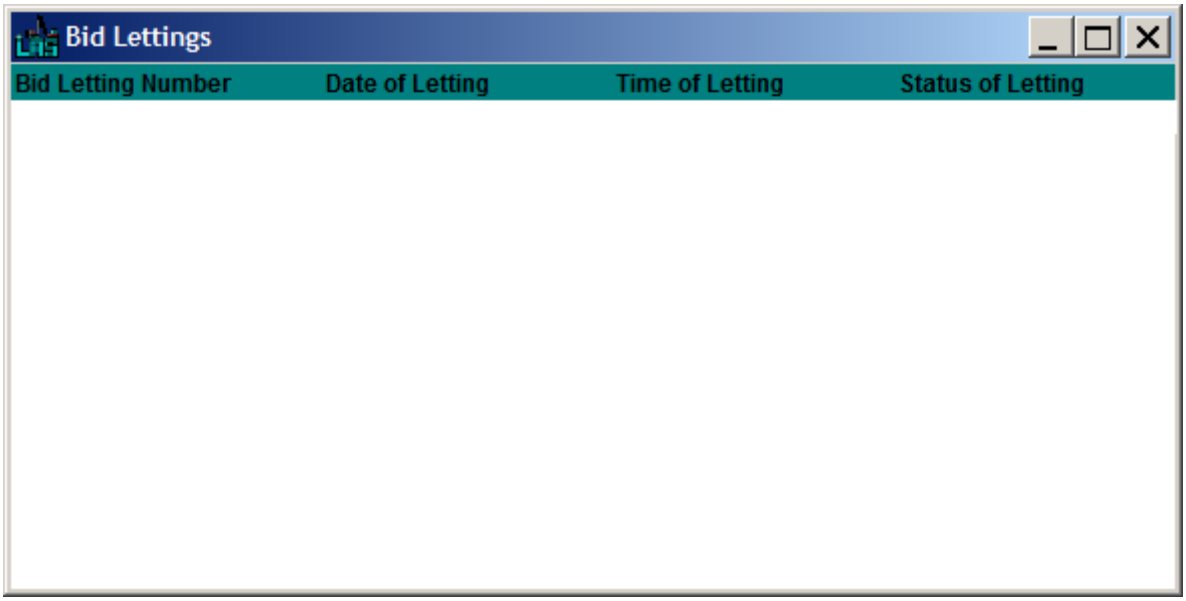
Adding a Bid Letting Package

11	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.

Continued on Following Page

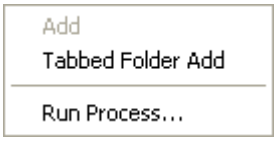
Setting Up a Bid Letting

(continued)



(*Bid Lettings Window*)

12	Right-click in the white space on the **Bid Lettings** window.	A right-click menu will appear.

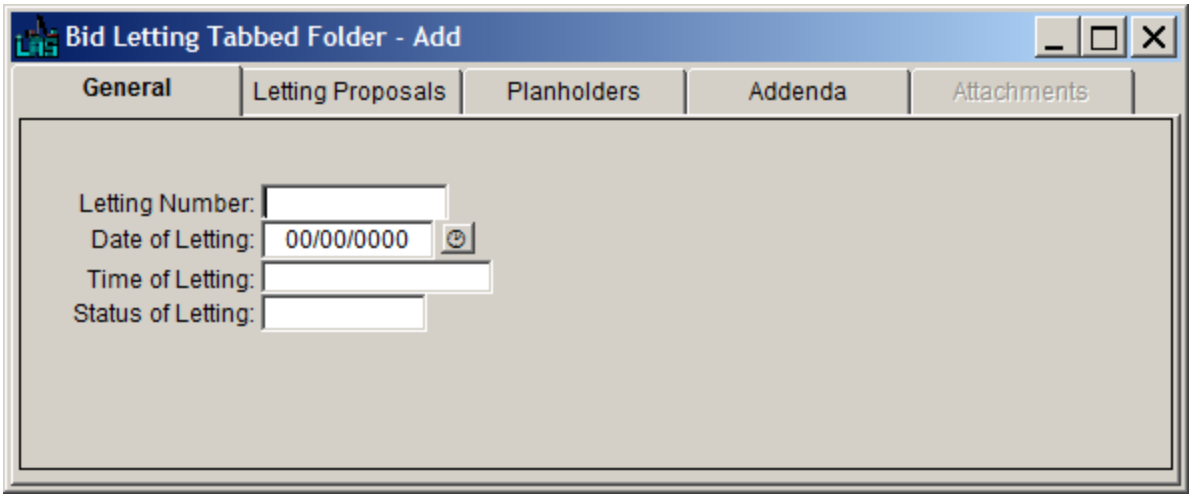


13	Select **TABBED FOLDER ADD** from the menu.	The **Bid Letting Tabbed Folder - Add** window will appear.

Continued on Following Page

Setting Up a Bid Letting

(continued)

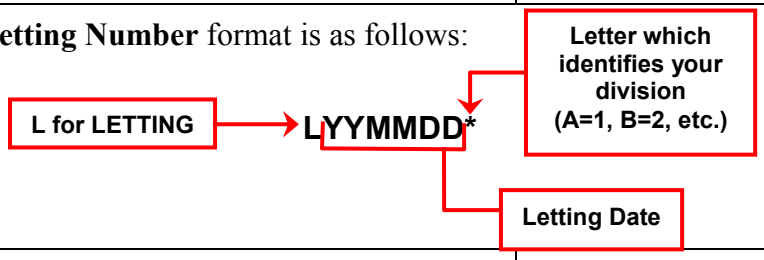


(*Bid Lettings Tabbed Folder – Add Window – General Tab*)

14	Type the **letting number** in the **LETTING NUMBER** field.	N/A

Letting Number Format

Letting Number format is as follows:



15	Type **letting date** in the **DATE OF LETTING** field. 🗁**NOTE:** If you click the button, a popup calendar will allow you to select the date so that it appears in the field.	N/A

Continued on Following Page

Setting Up a Bid Letting

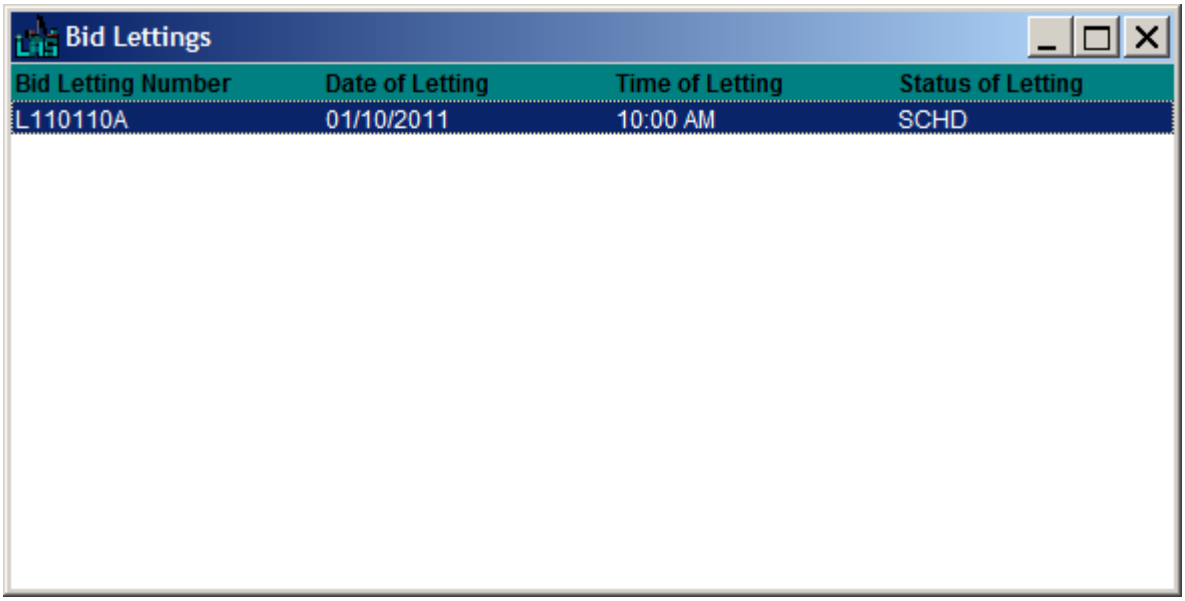
(continued)

16	Type the **letting time** in the **TIME OF LETTING** field. 🗁**NOTE:** Use the format **H:MM PM** For example: 10:00 AM 2:00 PM 1:45 PM	N/A
17	Select **SCHD** from the drop-down list in the **STATUS OF LETTING** field.	N/A
18	Click the **SAVE FOLDER** button.	Your letting has now been set up.

Linking Proposals to a Letting

Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.



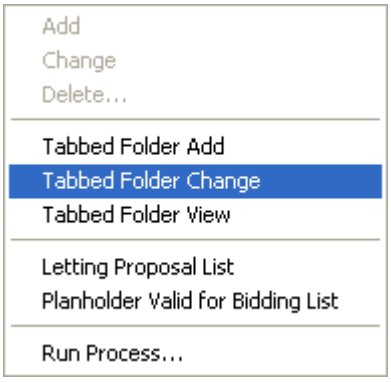
(*Bid Lettings Window*)

2	Right-click on the **bid letting** that either contains your proposal or the one you set up to place your proposal in.	A right-click menu will appear.

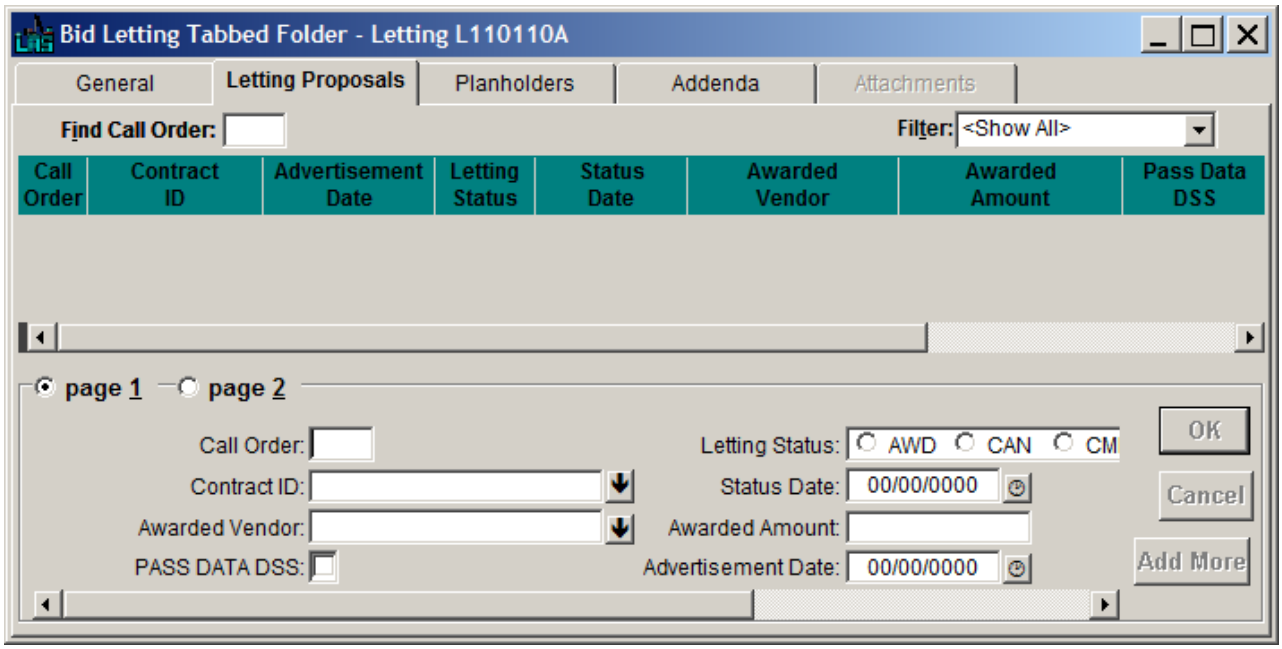
Continued on Following Page

Linking Proposals to a Letting

(continued)



2	Select **TABBED FOLDER CHANGE** from the menu.	The **Bid Letting Tabbed Folder** window will open to the **General** tab.
3	Click the **Letting Proposals** tab.	The **Letting Proposals** tab will be brought forward.



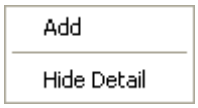
(*Letting Proposals Tab*)

Continued on Following Page

Linking Proposals to a Letting

(continued)

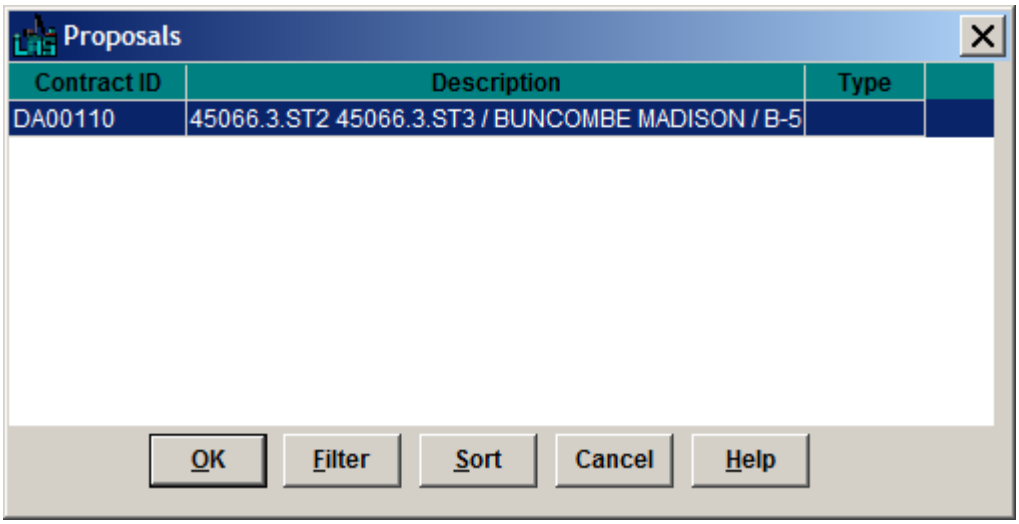
4	Right-click in the blank area on the **Letting Proposals** tab.	A right-click menu will appear.



5	Select **ADD** from the menu.	A blank line will appear highlighted.

NOTE: The **CALL ORDER NUMBER** field will default to the next available call order number.

6	Click the button beside the **CONTRACT ID** field.	The **Proposals** dialog will appear.



NOTE: Only proposals not already associated with a letting will appear in this dialog.

7	Click on the **contract ID** to select it.	N/A
8	Click the **OK** button.	The **selected Contract ID** will appear in the **CONTRACT ID** field.

Continued on Following Page

Linking Proposals to a Letting

(continued)

9	Type **advertisement date** in the **ADVERTISEMENT DATE** field. **NOTE:** If you click the button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
10	If you have additional proposals to link, Click the **Add More** button and repeat steps 6-9. If you are finished linking proposals, click the **OK** button	N/A
11	Click the **SAVE FOLDER** button.	The proposals have been linked to the letting.

IMPORTANT!

Unless you wish to **UNDO** everything you have just done, **DO NOT** move on to the next procedure.

The next procedure is called **Unlinking a Proposal from a Letting**. Do not perform this procedure unless you specifically wish to unlink the proposals from the letting.

Unlinking a Proposal from a Letting

IMPORTANT!

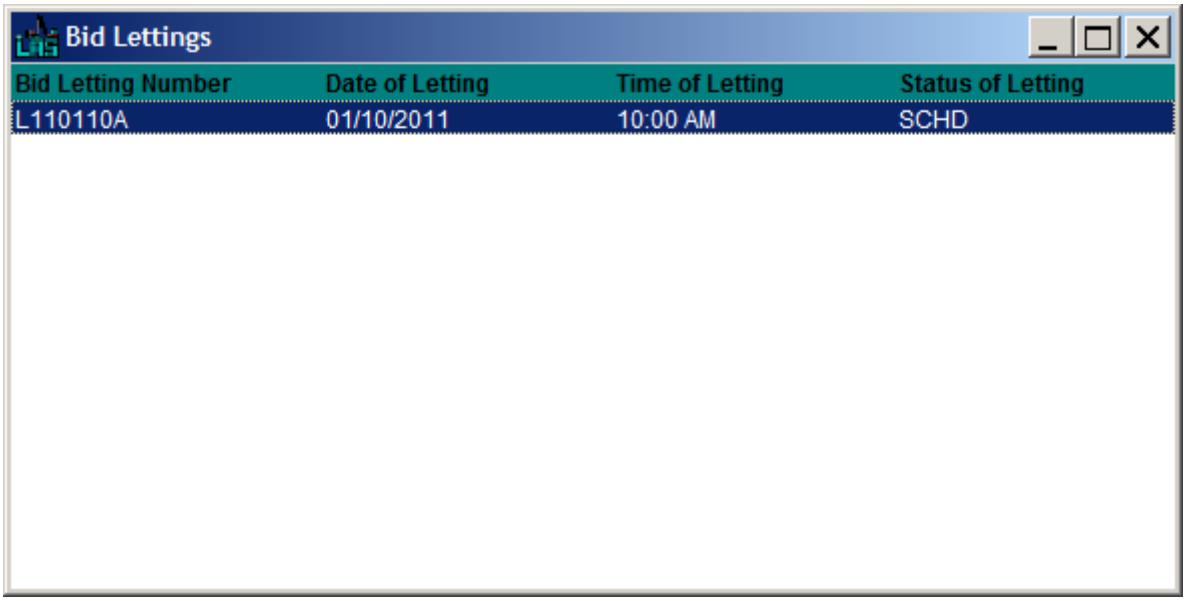
Please **DO NOT** perform this procedure unless you are certain you wish to unlink a proposal from a letting.

There may be an occasion when a proposal is pulled to be advertised at a later date. Under these circumstances, you will need to unlink the proposal after it has already been set up and linked to a letting.

To unlink a proposal, do the following:

Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.



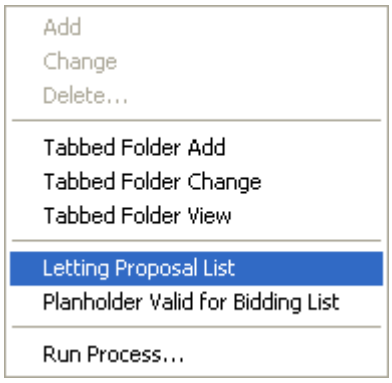
(*Bid Lettings Window*)

2	Right-click on the **bid letting** that contains the proposal you wish to unlink.	A right-click menu will appear.

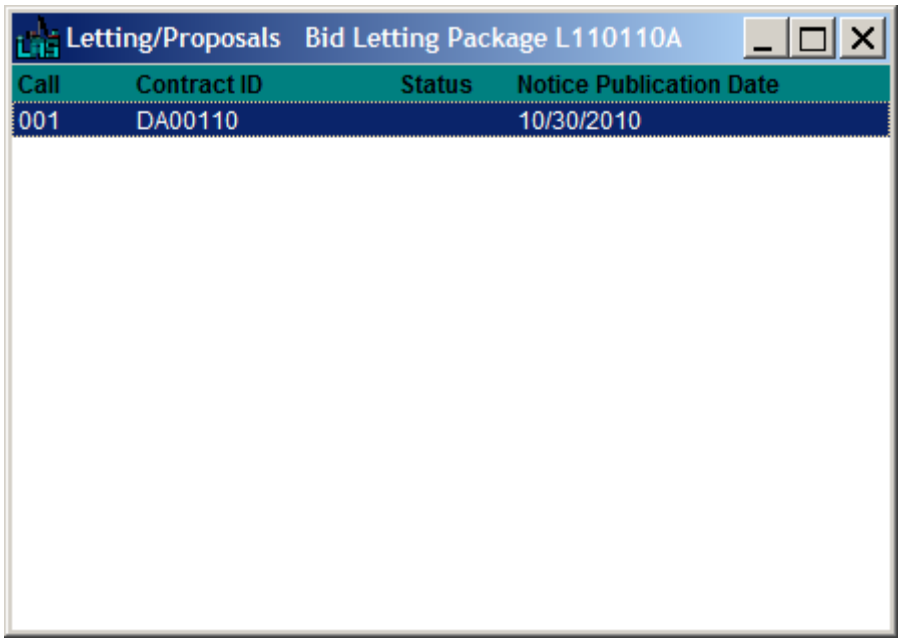
Continued on Following Page

Unlinking a Proposal from a Letting

(continued)



3	Select **LETTING PROPOSAL LIST** from the menu.	The **Letting/Proposals Bid Letting Package** window will appear.



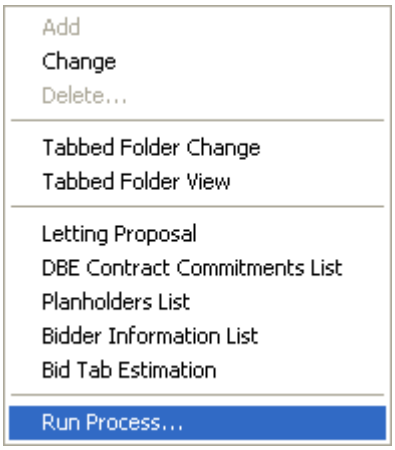
(*Letting/Proposals Bid Letting Package Window*)

4	Right-click on the **proposal** that you want to unlink from the bid letting.	A right-click menu will appear.

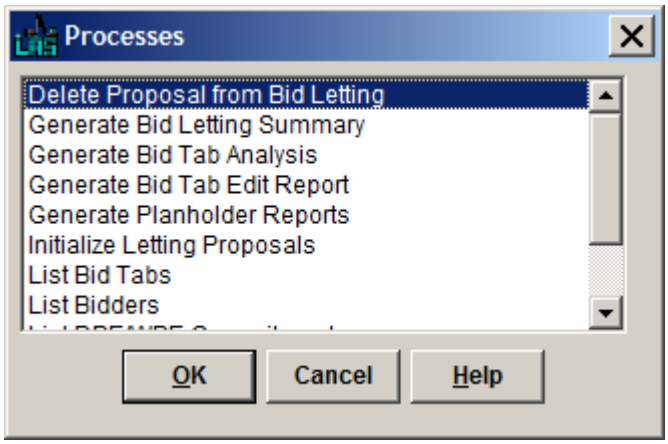
Continued on Following Page

Unlinking a Proposal from a Letting

(continued)



5	Select **RUN PROCESS…** from the menu.	The **Processes** dialog will appear.



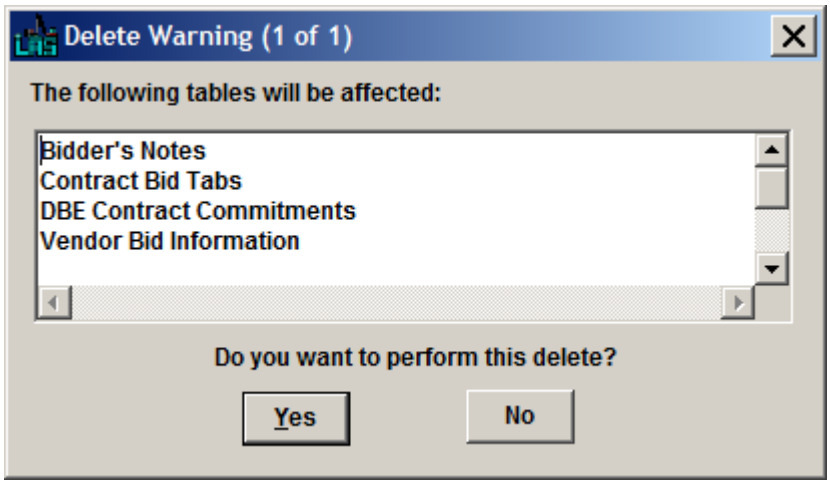
(*Processes Dialog*)

6	Select **DELETE PROPOSAL FROM BID LETTING**.	N/A
7	Click the **OK** button.	The following message will appear.

Continued on Following Page

Unlinking a Proposal from a Letting

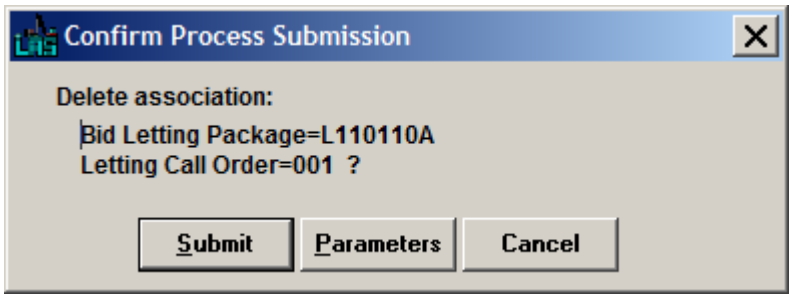
(continued)



This process will not actually **delete** the proposal. It will simply remove the selected proposal from the letting list. You will still be able to access the proposal in PES after you run this process.

This will however result in the loss of any planholder information associated with the proposal from the letting.

8	Click the **YES** button.	The following message will appear.

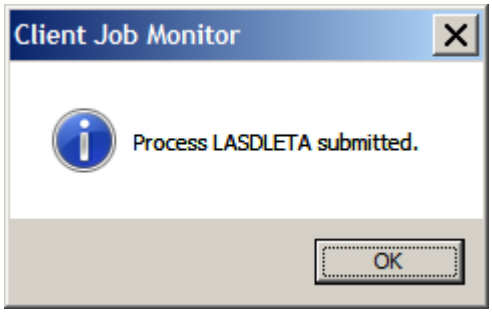


9	Verify that this is the correct proposal, (check the call order number) then click the **SUBMIT** button.	The following message will appear.

Continued on Following Page

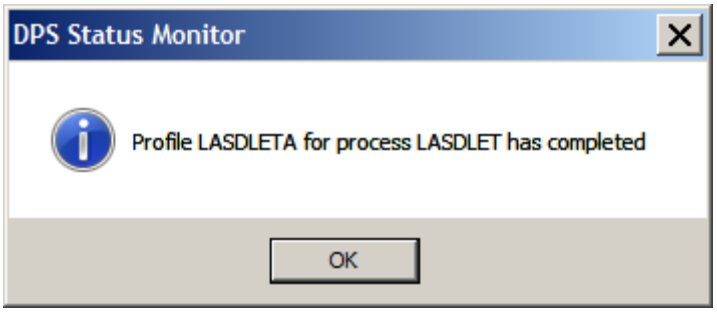
Unlinking a Proposal from a Letting

(continued)



10	Click the **OK** button.	When the process has completed the following message will appear.

🗁**NOTE:** This could take several minutes before the process completes.

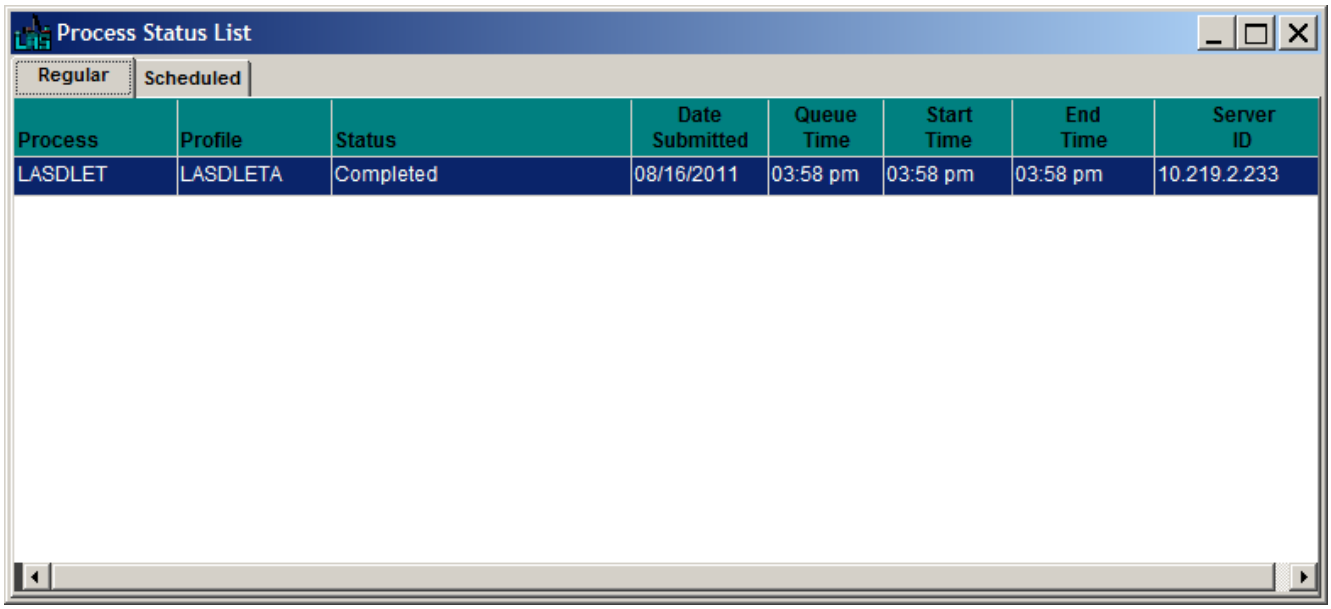


11	Click the **OK** button.	
12	Select **PROCESS STATUS** from the **FILE** drop-down menu.	The **Process Status List** window will appear.

Continued on Following Page

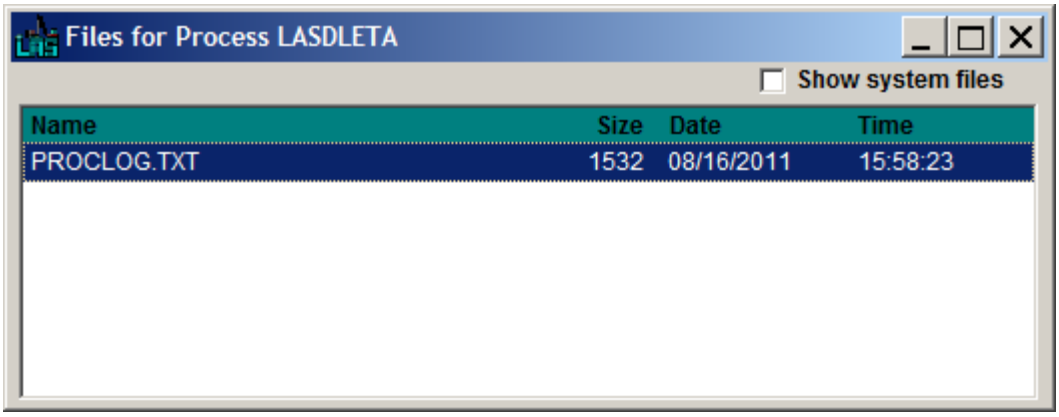
Unlinking a Proposal from a Letting

(continued)



(*Process Status List Window*)

13	Double-click the **process name**.	The **Process File List** window will appear.



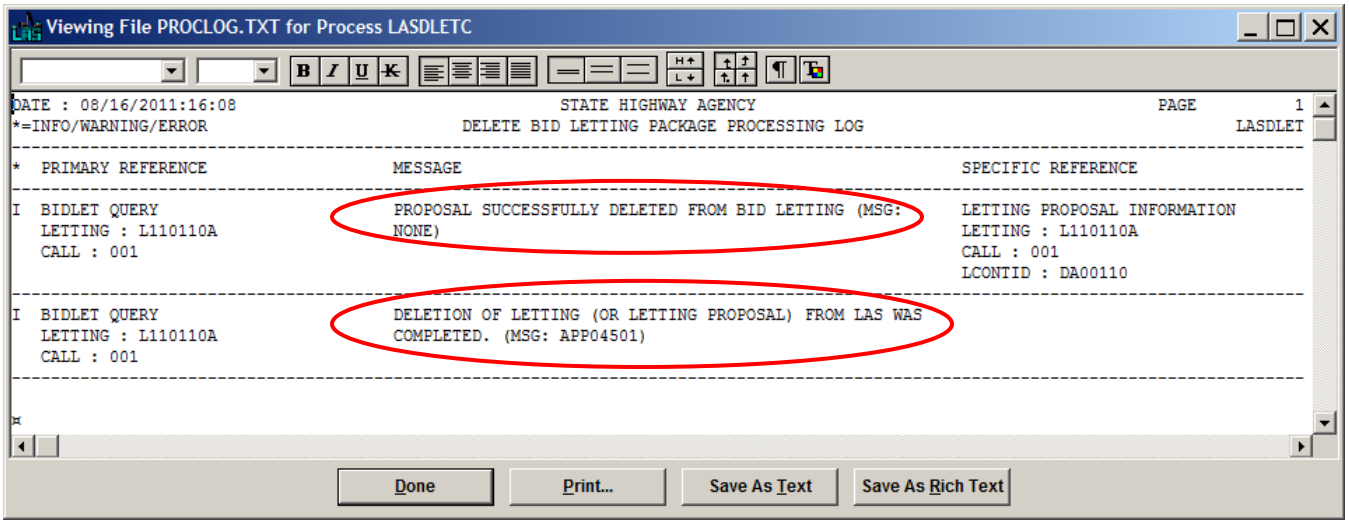
(*Process File List Window*)

14	Double-click the **PROCLOG.TXT** file.	The **PROCLOG.TXT** window will appear.

Continued on Following Page

Unlinking a Proposal from a Letting

(continued)



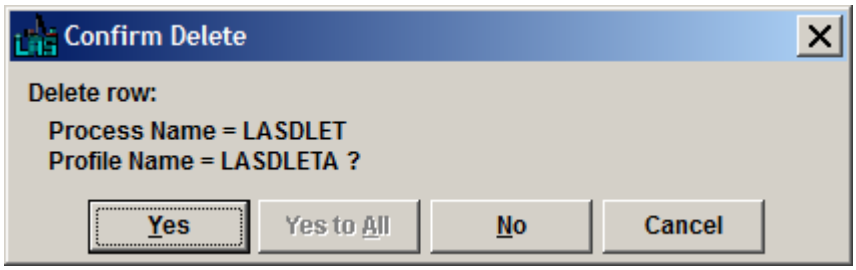
(*PROCLOG.TXT Window*)

15	Click the **DONE** button.	The proposal has been unlinked from the letting.

You will need to delete your process from the list.

From the **Process File List** window:

16	Right-click on the **process name**.	A right-click menu will appear.
17	Select **DELETE** from the menu.	The following message will appear.



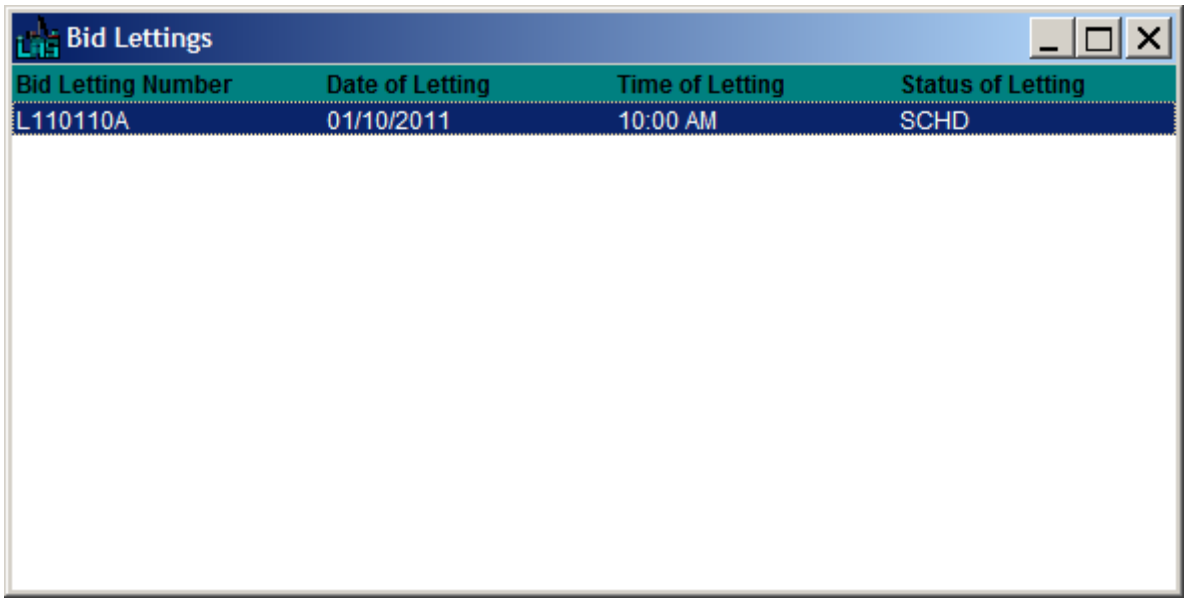
18	Click the **YES** button.	The process will be deleted.

Initializing Letting Proposals

You must initialize a proposal in order to advertise it.

Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.



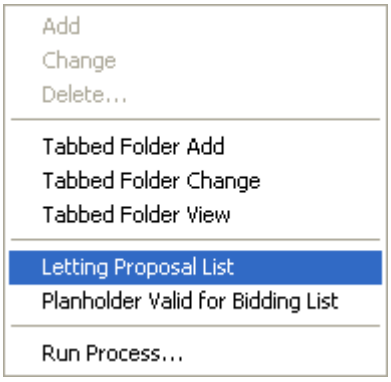
(*Bid Lettings Window*)

2	Right-click on the **bid letting** that contains the proposal you wish to initialize.	A right-click menu will appear.

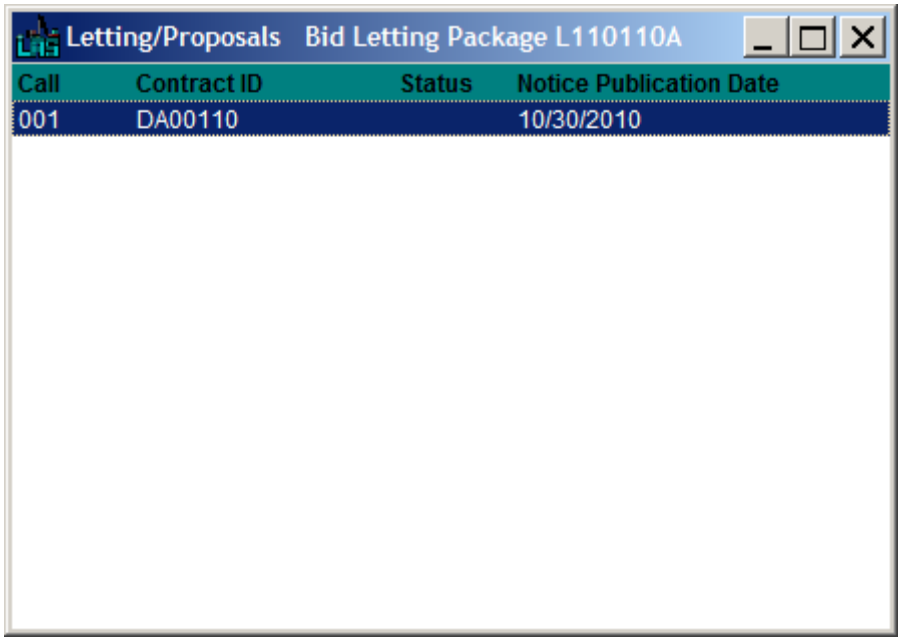
Continued on Following Page

Initializing Letting Proposals

(continued)



3	Select **LETTING PROPOSAL LIST** from the menu.	The **Letting/Proposals Bid Letting Package** window will appear.



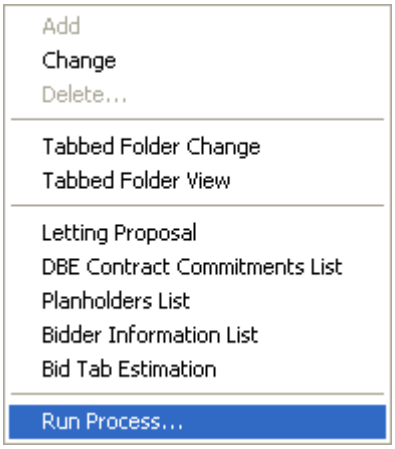
(*Letting/Proposals Bid Letting Package Window*)

Continued on Following Page

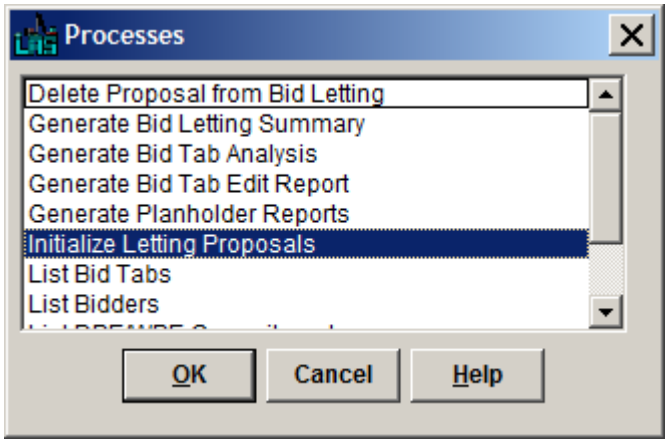
Initializing Letting Proposals

(continued)

4	Select the **proposal(s)** you wish to initialize by pressing the Ctrl key while clicking on each one. You can select a series of proposals by clicking on the first one, pressing the Shift key, and then clicking on the last one.	N/A
5	Right-click the **selected proposals**.	A right-click menu will appear.



6	Select **RUN PROCESS…** from the menu.	The **Processes** dialog will appear.



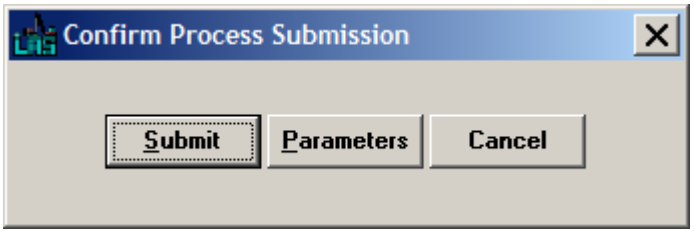
(*Processes Dialog*)

Continued on Following Page

Initializing Letting Proposals

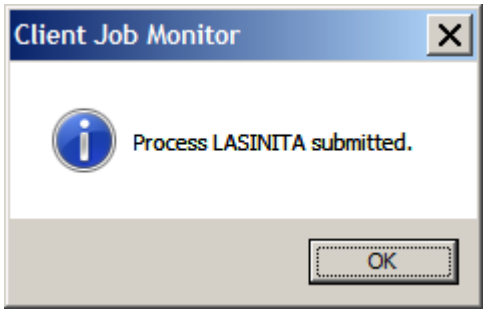
(continued)

7	Select **INITIALIZE LETTING PROPOSALS**.	N/A
8	Click the **OK** button.	The **Confirm Process Submission** dialog will appear.



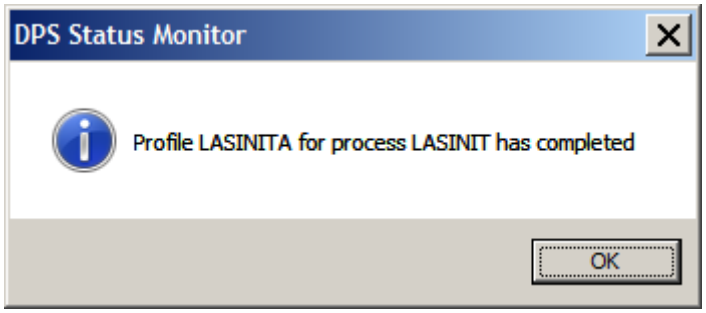
9	Click the **SUBMIT** button.	The following message will appear.

NOTE: Make a note of the process name.



10	Click the **OK** button.	The following message will appear.

NOTE: This could take several minutes before the process completes.



Continued on Following Page

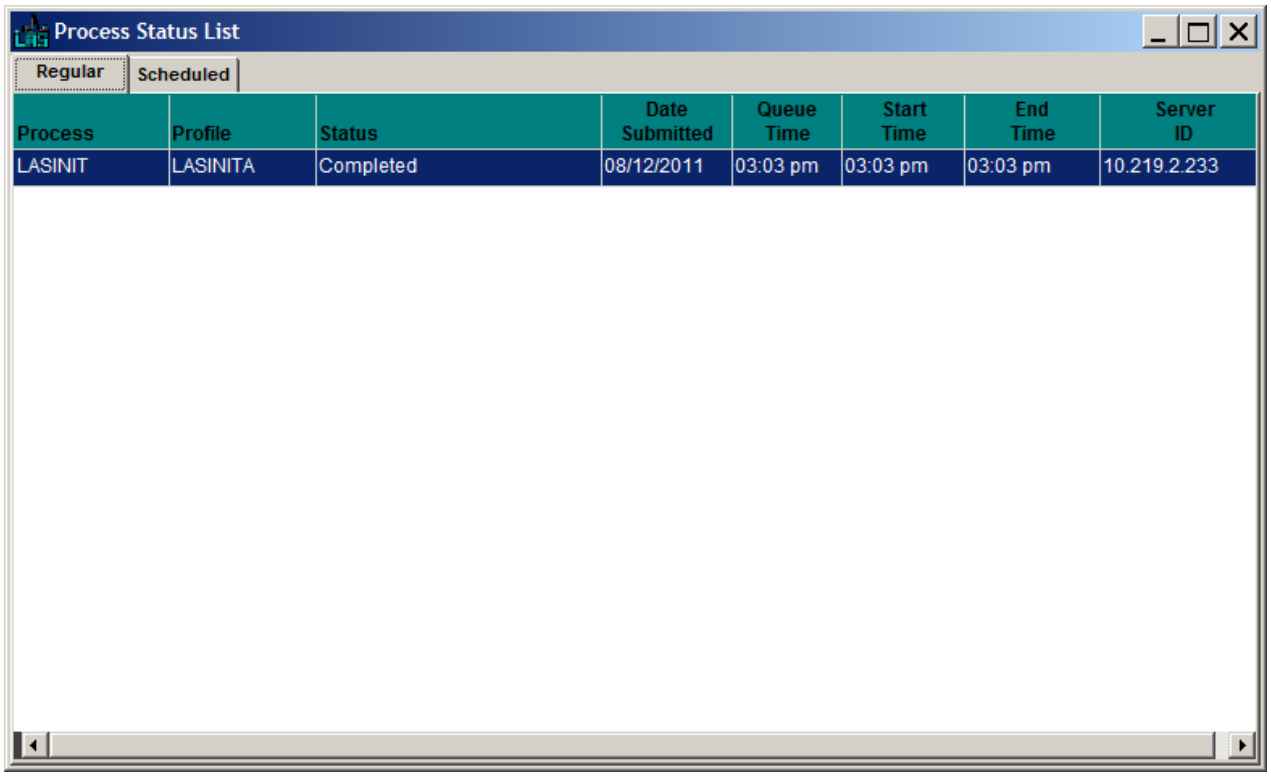
Initializing Letting Proposals

(continued)

11	Click the **OK** button.	N/A

Once the process has completed, you must determine if it was successful.

12	Select **PROCESS STATUS** from the **FILE** drop-down menu.	The **Process Status List** window will appear.



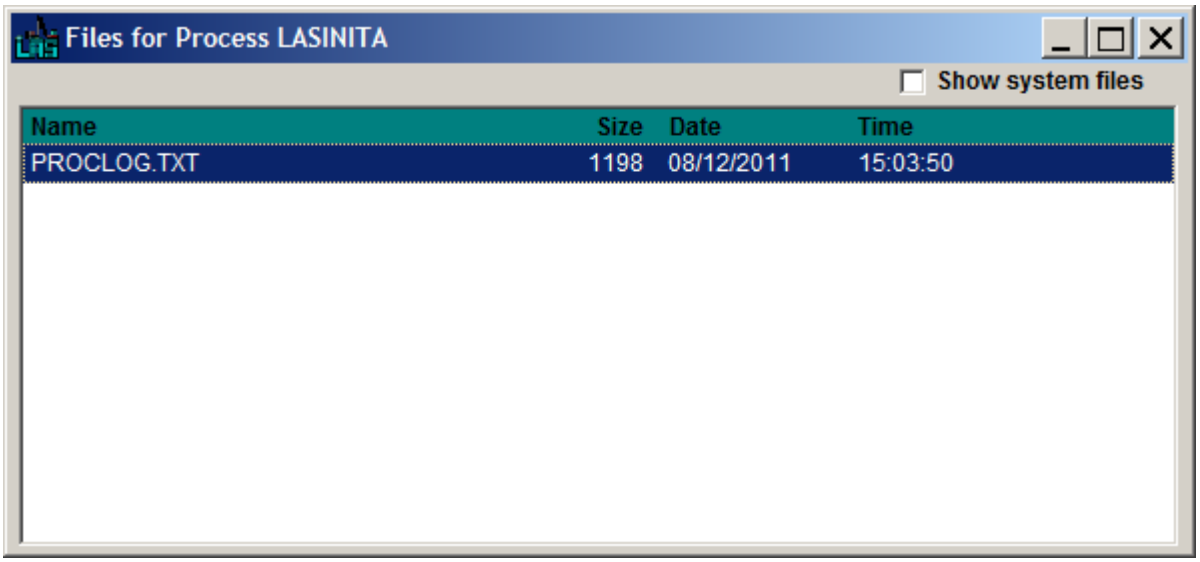
(*Process Status List Window*)

13	Double-click the **process name**.	The **Process File List** window will appear.

Continued on Following Page

Initializing Letting Proposals

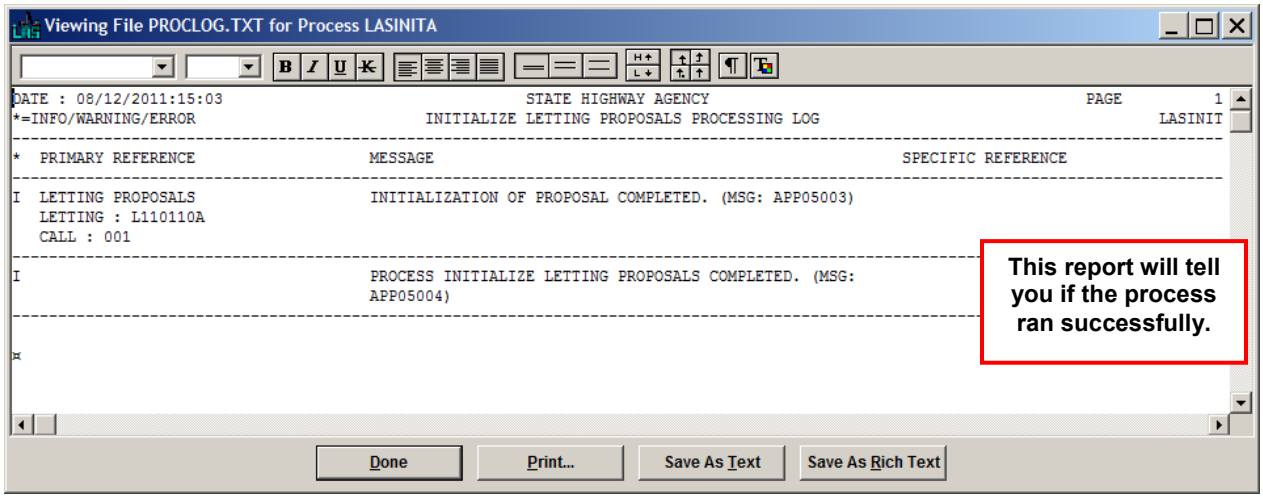
(continued)



(*Process File List Window*)

14	Double-click the **PROCLOG.TXT** file.	The file will open.

If the initialization was successful, the file will contain the following text: **INITIALIZATION OF PROPOSAL COMPLETED** and **PROCESS INITIALIZE LETTING PROPOSALS COMPLETED**. There will be no warnings or errors



(*PROCLOG.TXT File Window*)

Continued on Following Page

Initializing Letting Proposals

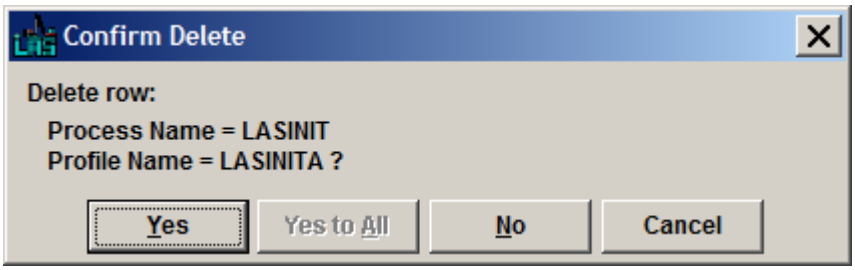
(continued)

If the initialization is unsuccessful, try to determine the error(s) and how to fix it/them from the system prompts.
If you are unable to resolve the error, call the Help Desk.

15	Click the **DONE** button.	The file will close and you will return to the **Process File List** window.
16	Close the **Process File List** window.	You will return to the **Process Status List** window.

You will need to delete your process from the list.

17	Right-click on the **process name**.	A right-click menu will appear.
18	Select **DELETE** from the menu.	The following message will appear.



19	Click the **YES** button.	The process will be deleted.
20	Close the **Process Status List** window.	You will return to the **Bid Lettings** window.

Chapter 7 Advertisement

Before an advertisement for a letting can be generated, you must confirm the following:

A. The bid letting you wish to advertise has been set up in Trns•port.

B. You have created a letting proposal for each proposal that will be advertised.

C. All **Project Control Groups** have been changed to **D*LADM** (The * will be your division letter.)

Printing the Advertisement

🗁**NOTE:** Please note that this is the **ADVERTISEMENT REPORT** for **CENTRAL LET PROJECTS** and portions of this report **MAY NOT BE APPLICABLE** for **DIVISIONS**.

This procedure can also be found in **Appendix C – Reports: Advertisement** on page **C-13**.

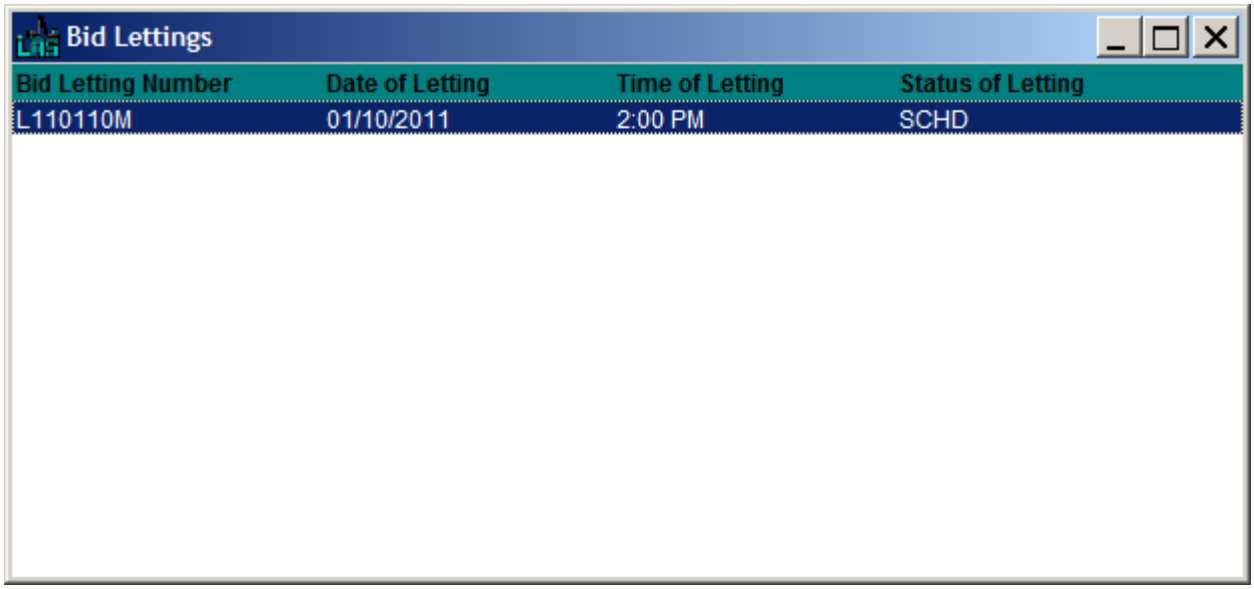
Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.

Continued on Following Page

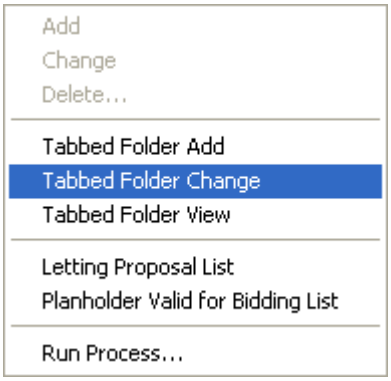
Printing the Advertisement

(continued)



(*Bid Lettings Window*)

2	Right-click on the **bid letting** you wish to advertise.	A right-click menu will appear.



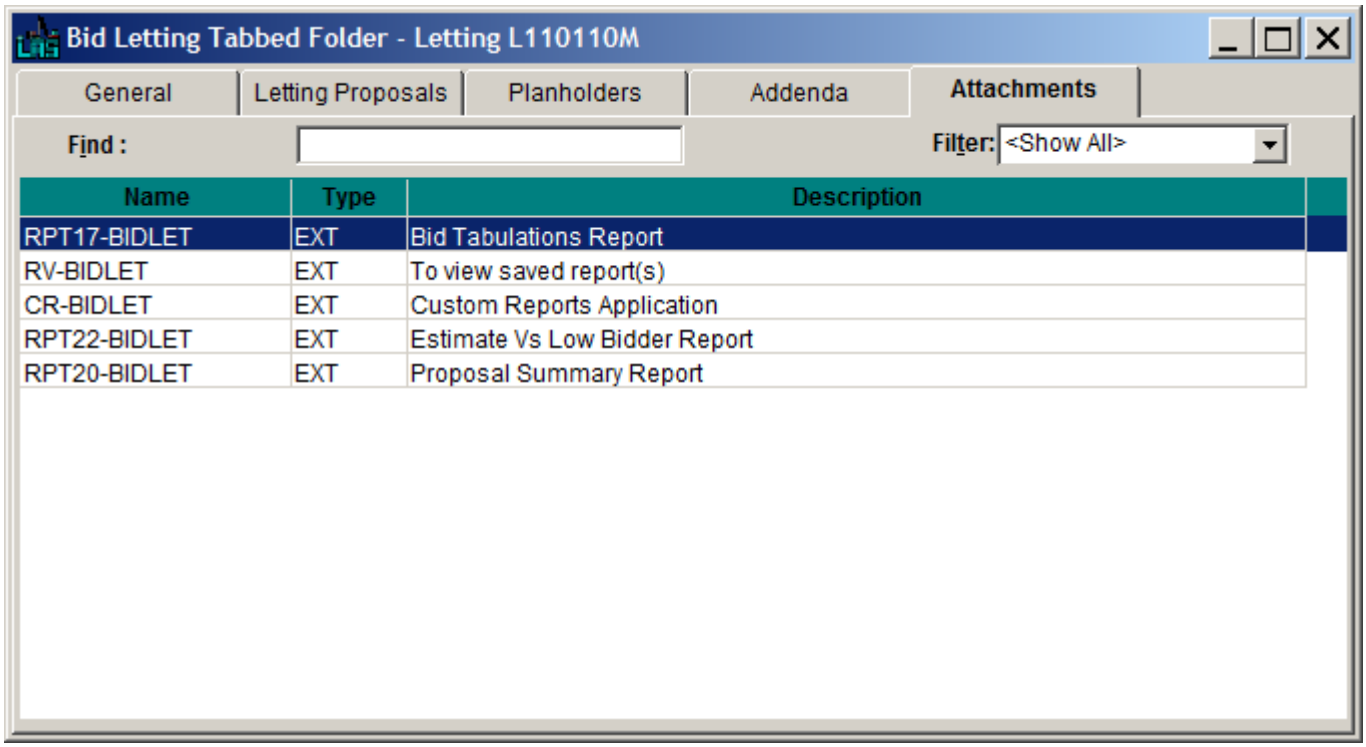
3	Select **TABBED FOLDER CHANGE** from the menu.	The **Bid Letting Tabbed Folder** window will open to the **General** tab.

Continued on Following Page

Printing the Advertisement

(continued)

4	Click the **Attachments** tab.	The **Attachments** tab will be brought forward.



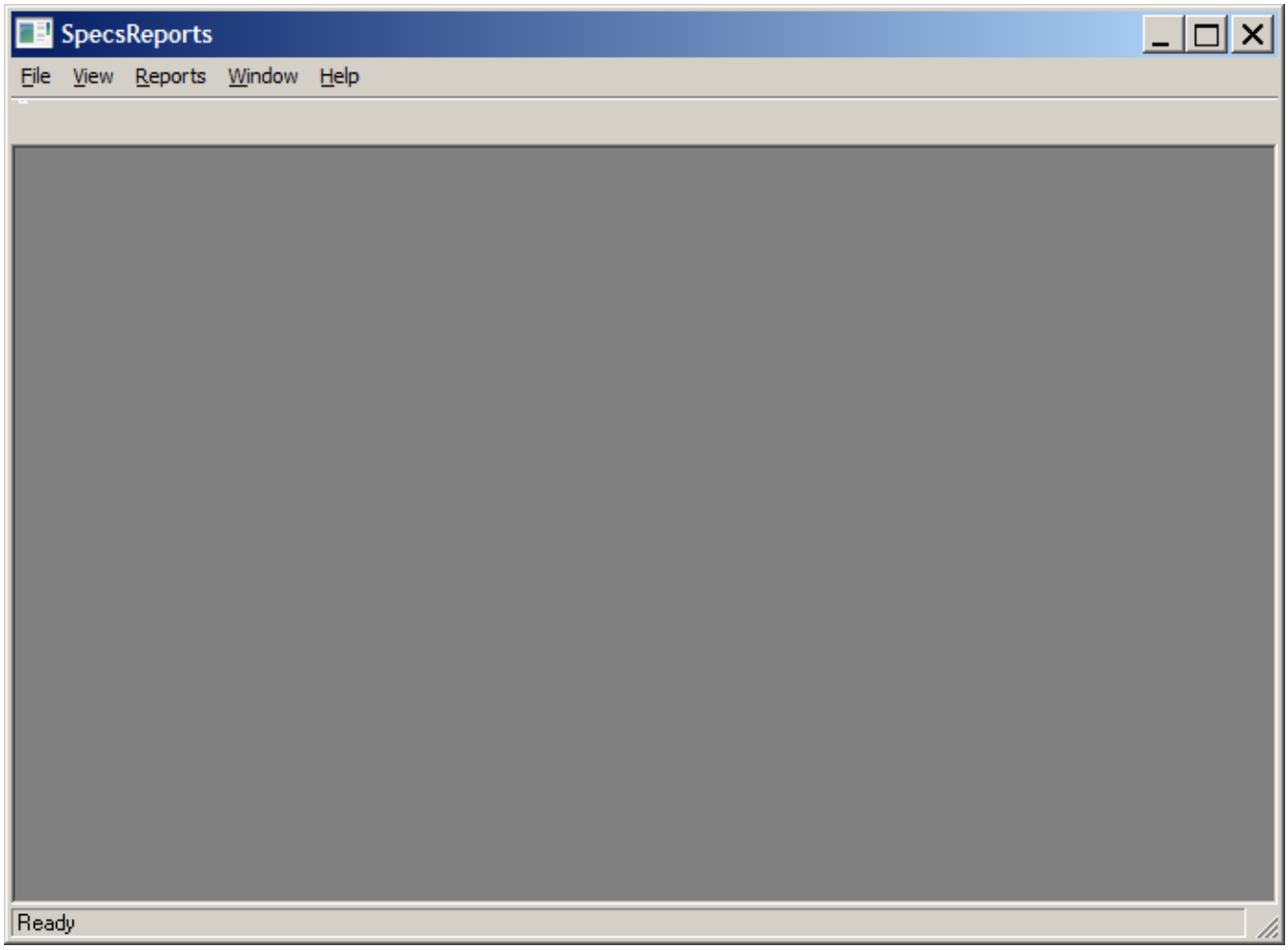
(*Attachments Tab*)

5	Double-click **CUSTOM REPORTS APPLICATION**.	The **SpecsReports** window will appear.

Continued on Following Page

Printing the Advertisement

(continued)

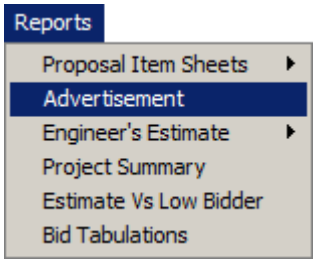


(*SpecsReports Window*)

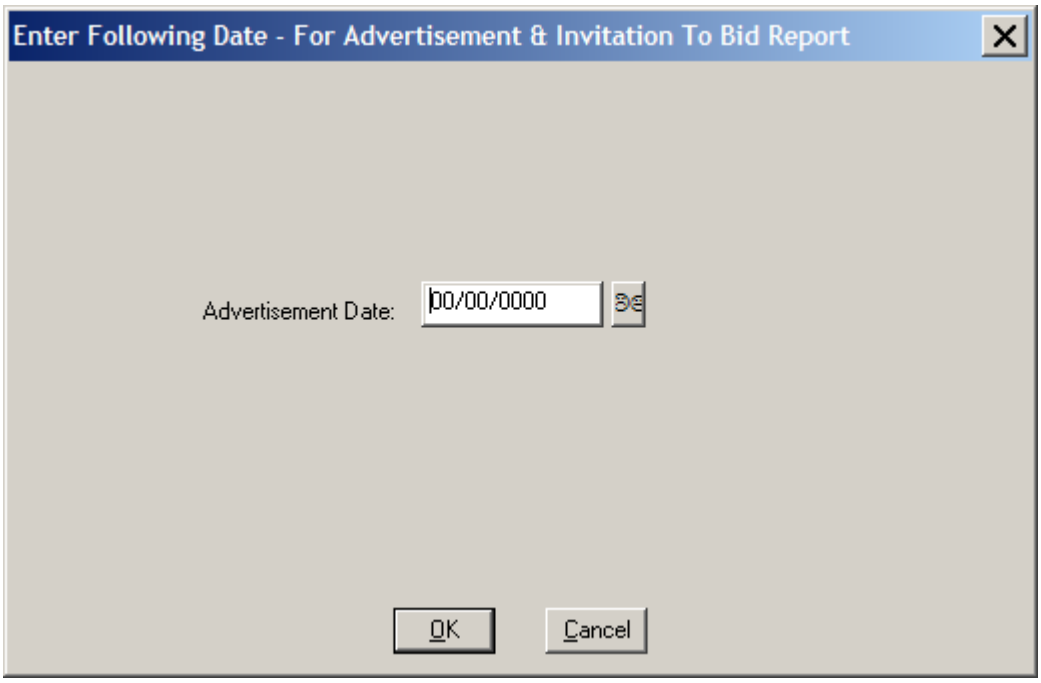
Continued on Following Page

Printing the Advertisement

(continued)



6	From the **REPORTS** drop-down menu, select **Advertisement**.	The **Enter Following Date - For Advertisement & Invitation to Bid Report** window will appear.



(*Enter Following Date – For Advertisement & Invitation To Bid Report Window*)

7	Click the button.	A calendar will appear.

Continued on Following Page

Printing the Advertisement

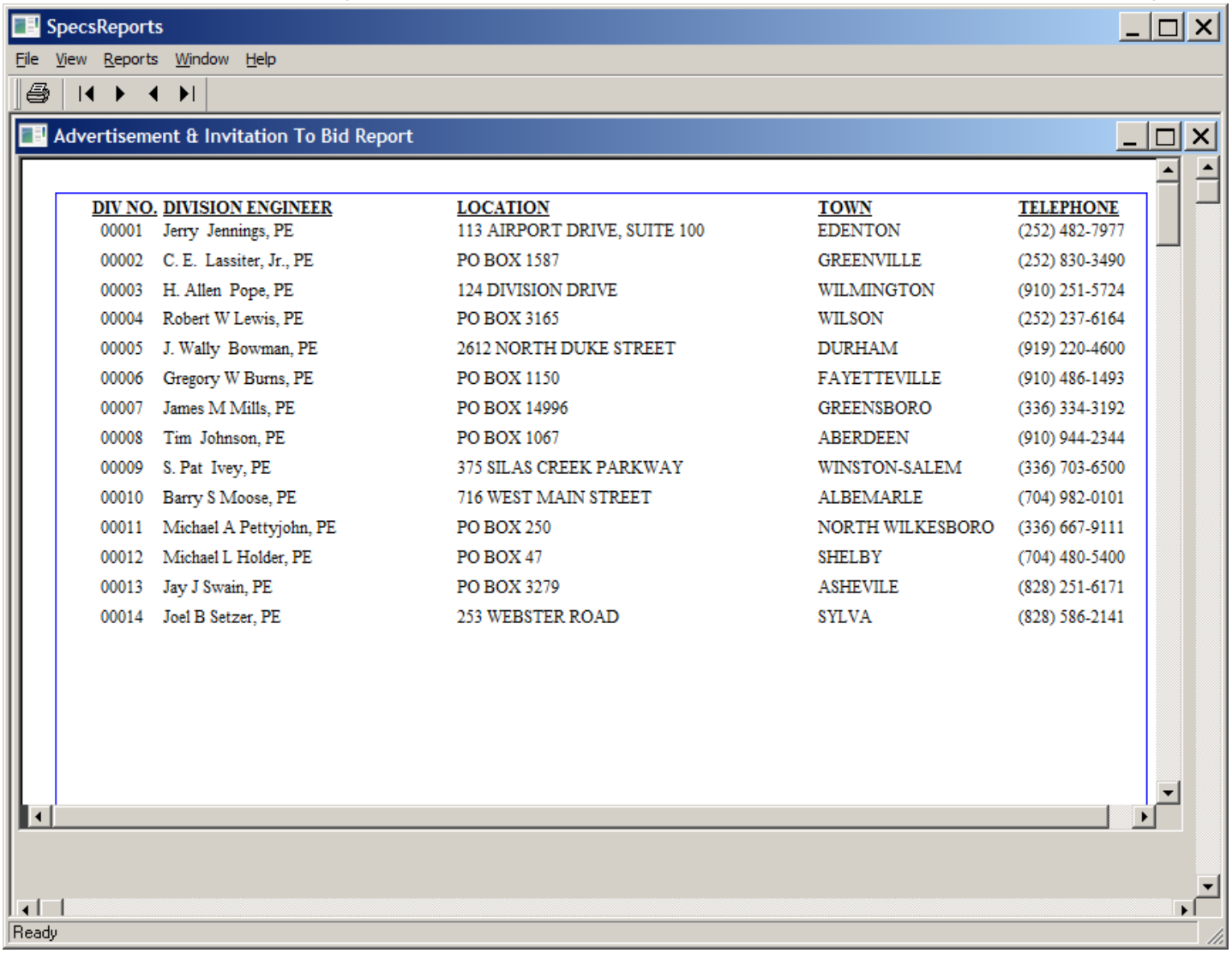
(continued)

8	Select the **advertisement date** from the calendar.	N/A
9	Click the OK button.	The **Advertisement & Invitation to Bid Report** will appear.

Continued on Following Page

Printing the Advertisement

(continued)



DIV NO.	DIVISION ENGINEER	LOCATION	TOWN	TELEPHONE
00001	Jerry Jennings, PE	113 AIRPORT DRIVE, SUITE 100	EDENTON	(252) 482-7977
00002	C. E. Lassiter, Jr., PE	PO BOX 1587	GREENVILLE	(252) 830-3490
00003	H. Allen Pope, PE	124 DIVISION DRIVE	WILMINGTON	(910) 251-5724
00004	Robert W Lewis, PE	PO BOX 3165	WILSON	(252) 237-6164
00005	J. Wally Bowman, PE	2612 NORTH DUKE STREET	DURHAM	(919) 220-4600
00006	Gregory W Burns, PE	PO BOX 1150	FAYETTEVILLE	(910) 486-1493
00007	James M Mills, PE	PO BOX 14996	GREENSBORO	(336) 334-3192
00008	Tim Johnson, PE	PO BOX 1067	ABERDEEN	(910) 944-2344
00009	S. Pat Ivey, PE	375 SILAS CREEK PARKWAY	WINSTON-SALEM	(336) 703-6500
00010	Barry S Moose, PE	716 WEST MAIN STREET	ALBEMARLE	(704) 982-0101
00011	Michael A Pettyjohn, PE	PO BOX 250	NORTH WILKESBORO	(336) 667-9111
00012	Michael L Holder, PE	PO BOX 47	SHELBY	(704) 480-5400
00013	Jay J Swain, PE	PO BOX 3279	ASHEVILE	(828) 251-6171
00014	Joel B Setzer, PE	253 WEBSTER ROAD	SYLVA	(828) 586-2141

(*Advertisement & Invitation to Bid Report Window*)

You have now created the information for your advertisement

Continued on Following Page

Printing the Advertisement

(continued)

At this point, you will need to do the following:

🗁**NOTE:** In order to save the report as a PDF, you must first set your default printer to **deskPDF**.
The procedure for **Setting deskPDF as The Default Printer** are on page **C-1**.

1. Save the report as a PDF.
   The procedure for **Saving a Report as a PDF** is on page **C-34**.
2. Print the report.
   The procedure for **Printing a Saved Report** is on page **C-36**.

🗁**NOTE:** Please note that the **FIRST PAGE** of this report may not be applicable.

Chapter 8 Bid Preparation

Contractor bids are set up in the Expedite Entry application and exported into Trns•port LAS.

Expedite entry will be used to record the contractor, the bid, DBE, MBE, and WBE information.

Bid Preparation requires the following 3 steps:

1. Creating the EBS file
2. Creating the DBE_NC.BIN file
3. Combining the output files

Creating the EBS File

The EBS file is used by contractors to enter their bids using the **Expedite Bid** application. It allows them to electronically submit bids and DBE/MBE/WBE information.

Division personnel also use the EBS file to enter paper bids into the **Expedite Entry** application.

Once you have successfully logged into **Trns•port PES**:

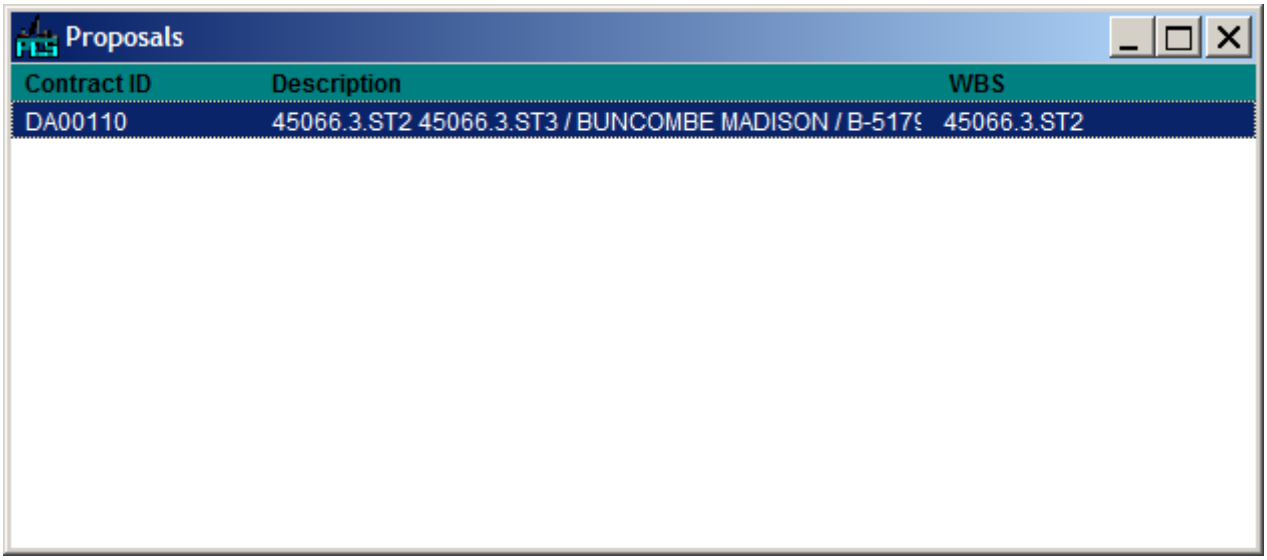
Running the EBS File Generation Process

Step	Action	Result
1	Click the **PROPOSALS** button.	The **Proposals** window will appear.

Continued on Following Page

Creating the EBS File

(continued)



(*Proposals Window*)

NOTE: You can run the process on multiple proposals or just one.

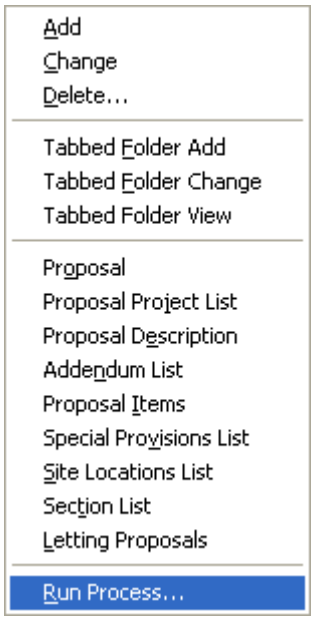
2	Right-Click on a **proposal** to select it.	A right-click menu will appear.

If you would like to select multiple proposals, hold down the Ctrl key and click each proposal you wish to select.

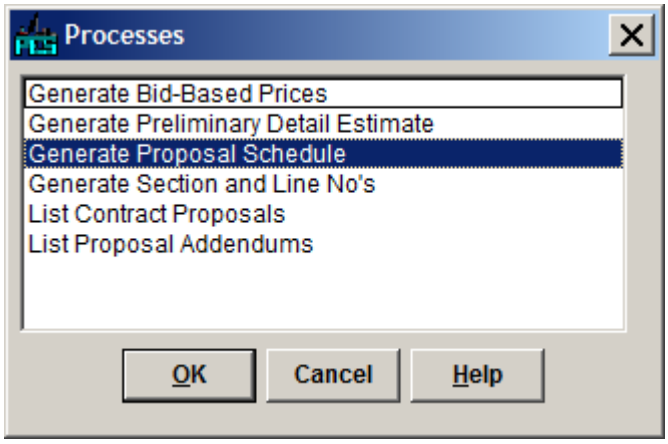
Continued on Following Page

Creating the EBS File

(continued)



3	Select **RUN PROCESS…** from the menu.	The **Processes** dialog will appear.



(*Processes Dialog*)

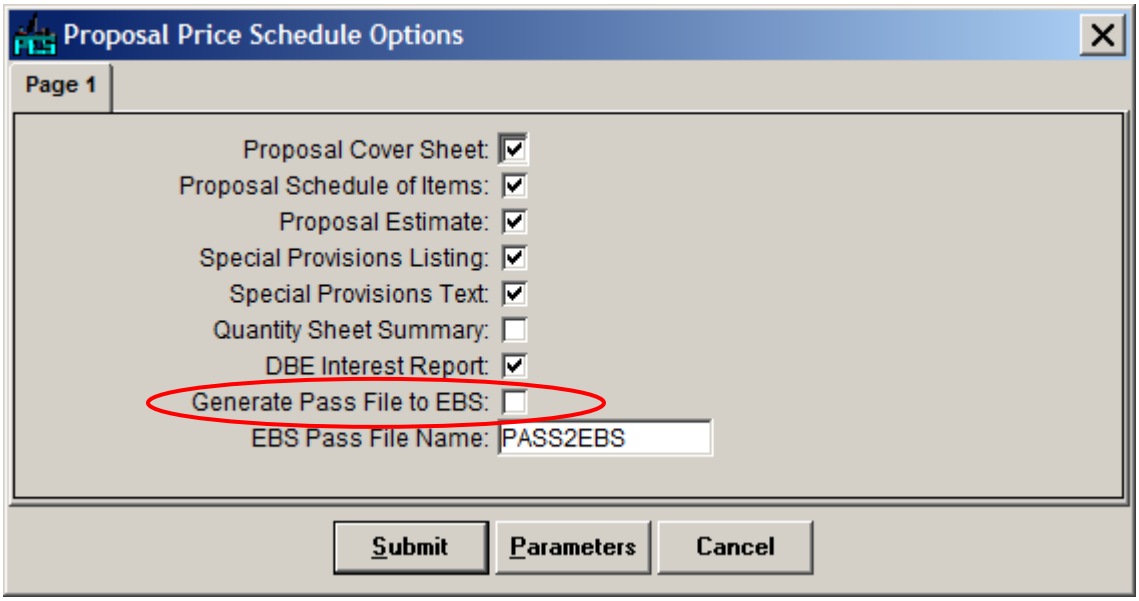
4	Click on **Generate Proposal Schedule** to select it.	N/A

Continued on Following Page

Creating the EBS File

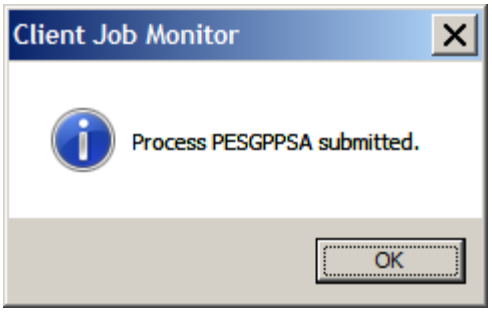
(continued)

5	Click the **OK** button.	The **Proposal Price Schedule Options** dialog will appear.



(*Proposal Price Schedule Options Dialog*)

6	Check the **GENERATE PASS FILE TO EBS** check box.	N/A
7	Click the **SUBMIT** button.	The following message will appear.



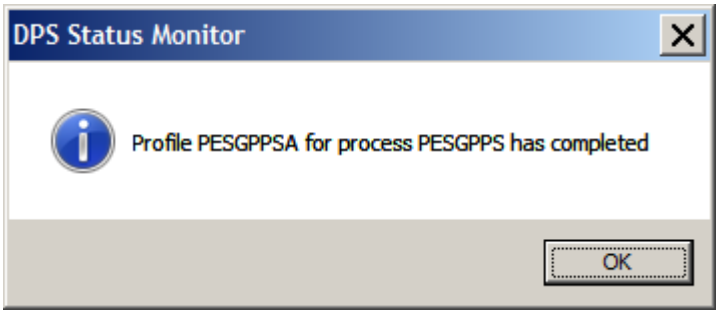
Continued on Following Page

Creating the EBS File

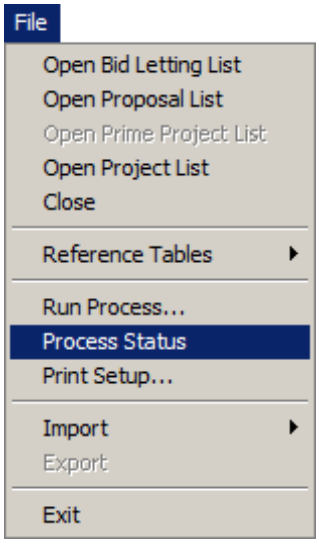
(continued)

8	Click the **OK** button.	The following message will appear.

🗁**NOTE:** This could take several minutes before the process completes.



Now you'll need to go to the **Process Status** window to see if the process was successful.

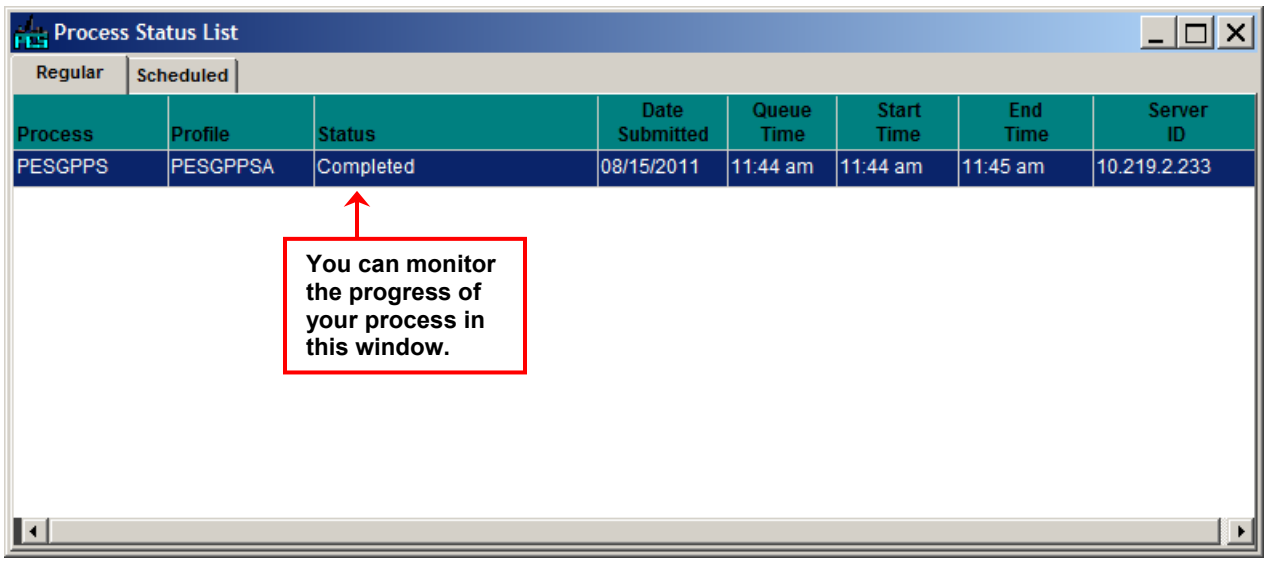


9	Select **PROCESS STATUS** from the **FILE** drop-down menu.	The **Process Status List** window will appear.

Continued on Following Page

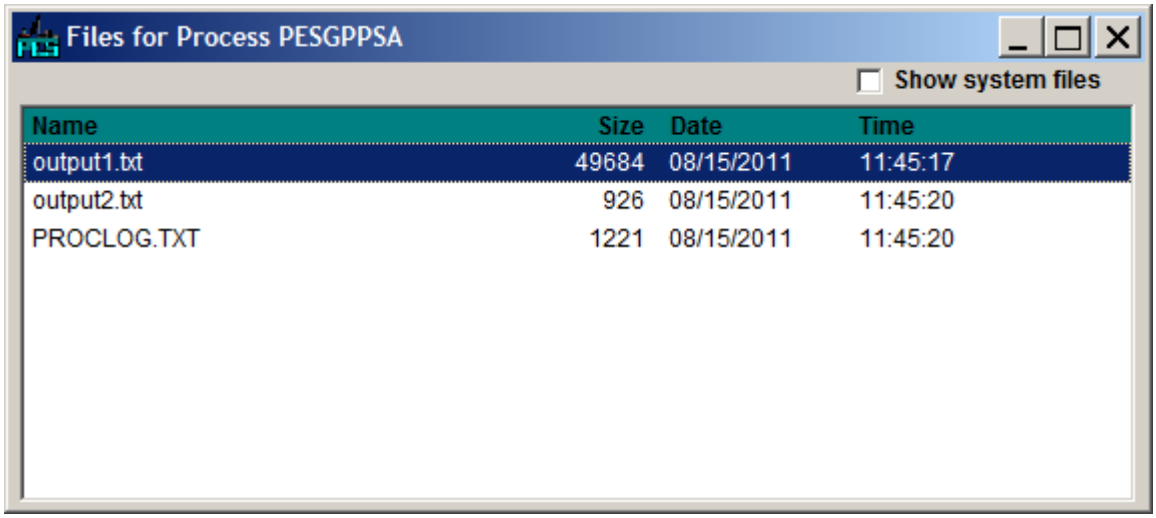
Creating the EBS File

(continued)



(*Process Status List Window*)

10	Once completed, double-click the **process name**.	The **Process File List** window will appear.



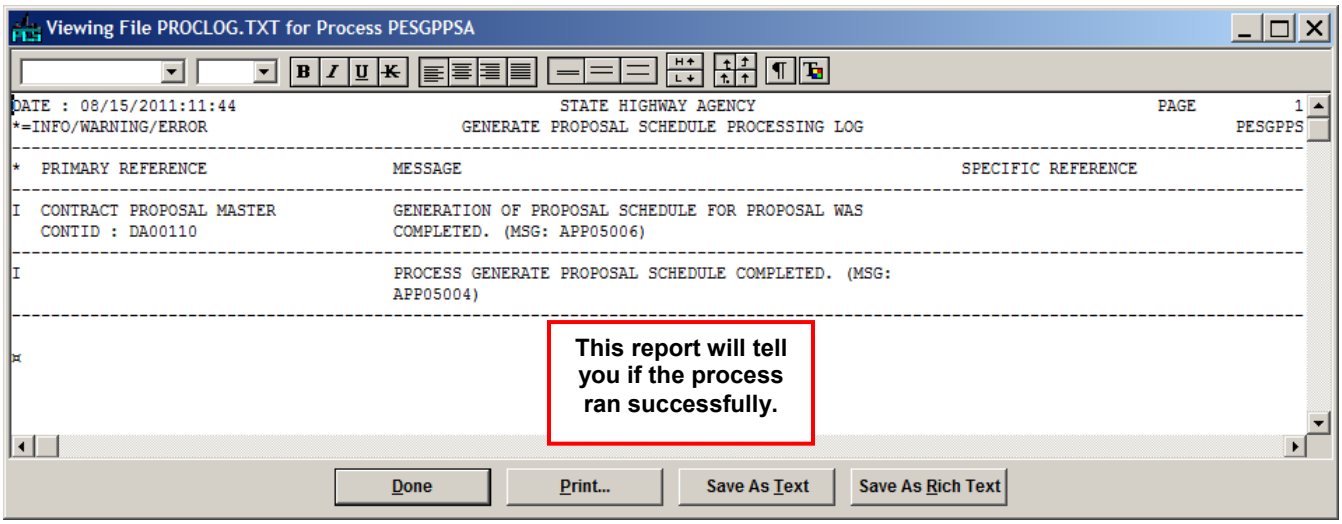
(*Process File List Window*)

11	Double-click the **PROCLOG.TXT** file.	The file will open.

Continued on Following Page

Creating the EBS File

(continued)



(*PROCLOG.TXT File Window*)

If the process was unsuccessful, try to determine the error from the system prompts. If you are unable to determine the nature of the error and to fix it, contact the Help Desk.

12	Click the **DONE** button.	The file will close and you will return to the **Process File List** window.
13	Close the **Process File** List window.	You will return to the **Process Status List** window.

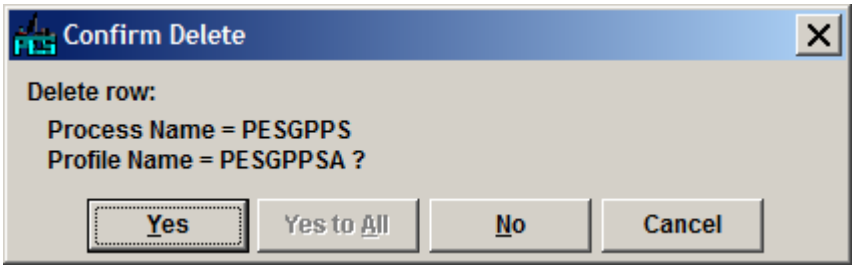
You will need to delete your process from the list.

14	Right-click on the **process name**.	A right-click menu will appear.
15	Select **DELETE** from the menu.	The following message will appear.

Continued on Following Page

Creating the EBS File

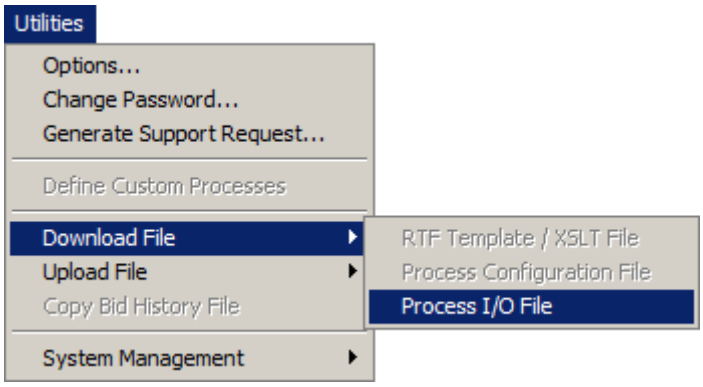
(continued)



16	Click the **YES** button.	The process will be deleted.
17	Close the **Process Status List** window.	You will return to the **Proposals** window.

Downloading the EBS File from the Application Server

Now you will need to download the EBS file from the application server.

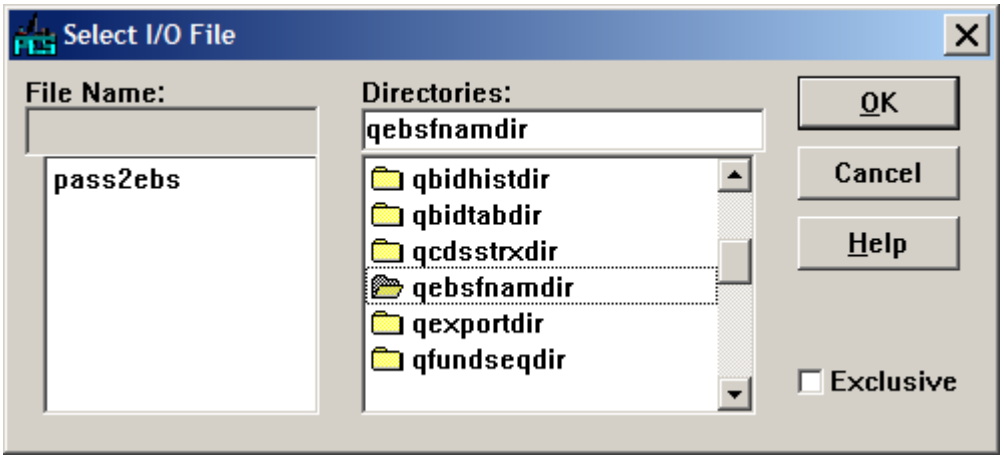


18	Select **DOWNLOAD FILE**, then **PROCESS I/O FILE** from the **UTILITIES** drop-down menu.	The **Select I/O File** dialog will appear.

Continued on Following Page

Creating the EBS File

(continued)



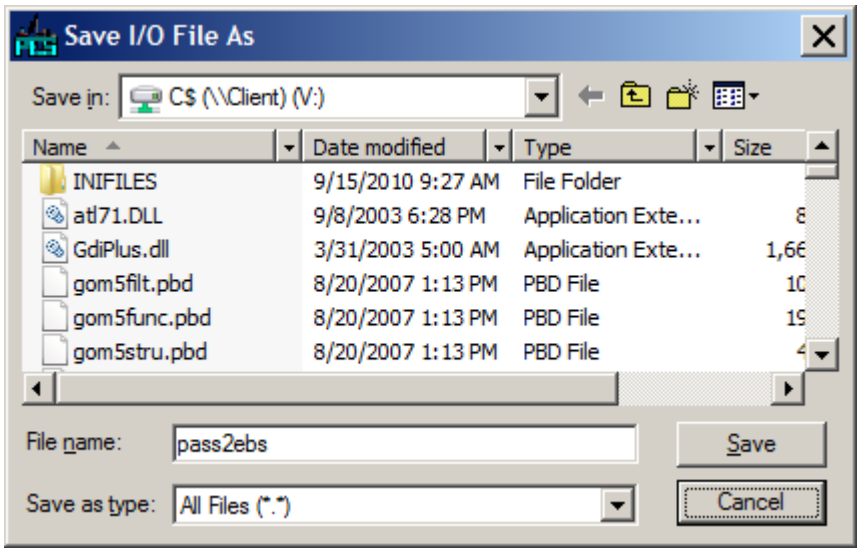
(*Select I/O File Dialog*)

19	Double-click the **qebsfnamdir** directory folder.	The files in this directory will appear in the left pane of the dialog.
20	Click on the **pass2ebs** file to select it.	N/A
21	Click the **OK** button.	The **Save I/O File As** dialog will appear.

Continued on Following Page

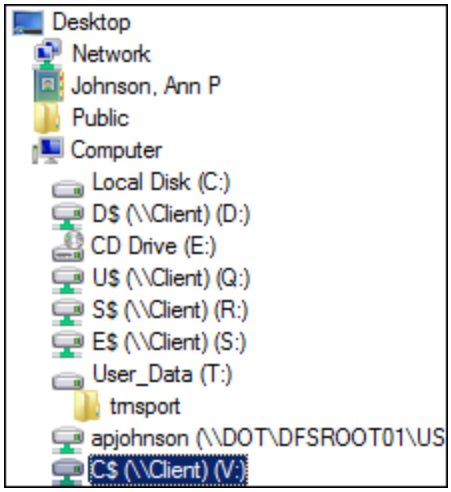
Creating the EBS File

(continued)



(*Save I/O File As Dialog*)

22	Select **C$ (\\Client) (V:)** from the drop-down list in the **SAVE IN** field.	N/A

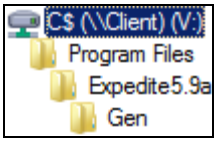


Continued on Following Page

Creating the EBS File

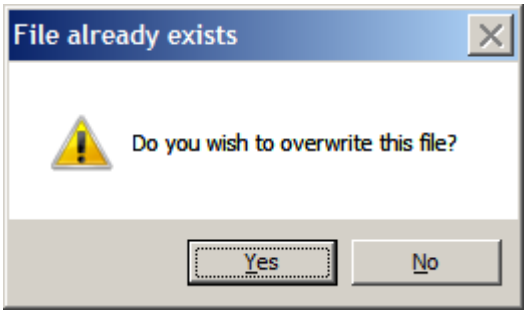
(continued)

23	In the **SAVE IN** field. Select **\Program Files\Expedite5.9a\Gen** from the drop-down list.	N/A



24	Type **.txt** after pass2ebs in the **FILE NAME** field.	This will ensure that the file will be saved as a text file.
25	Click the **SAVE** button.	The file will be saved in the **C:\Program Files\Expedite5.9a\Gen** directory.

🗁**NOTE:** If you have another **pass2ebs** file in this location, you will receive a warning that it will be overwritten. Click the **YES** button to overwrite the file.



The **pass2ebs** file will be located in the **C:\Program Files\Expedite5.9a\Gen** directory.

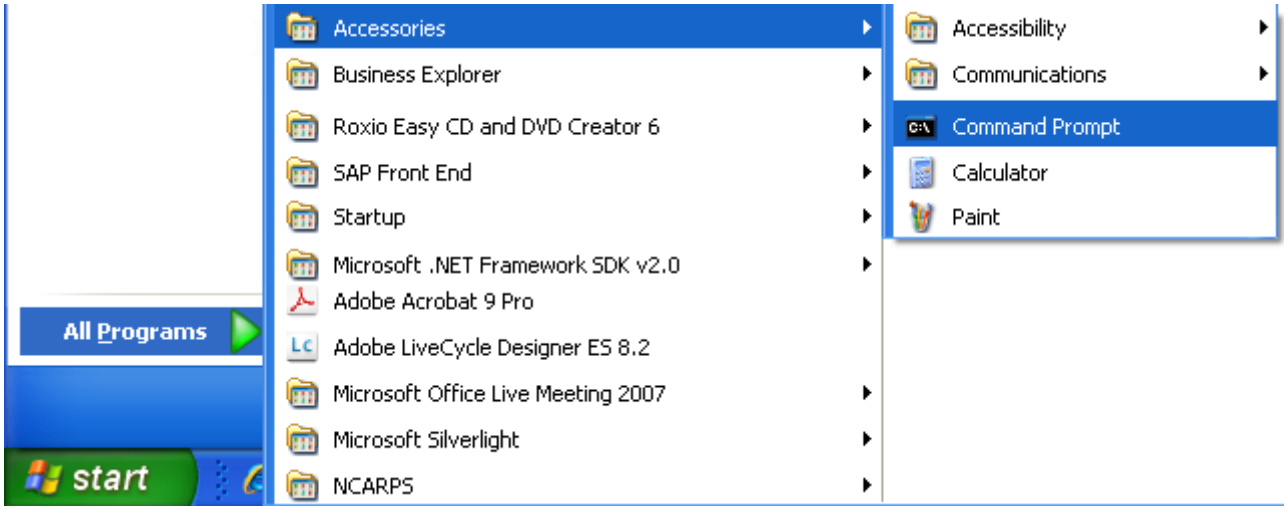
Continued on Following Page

Creating the EBS File

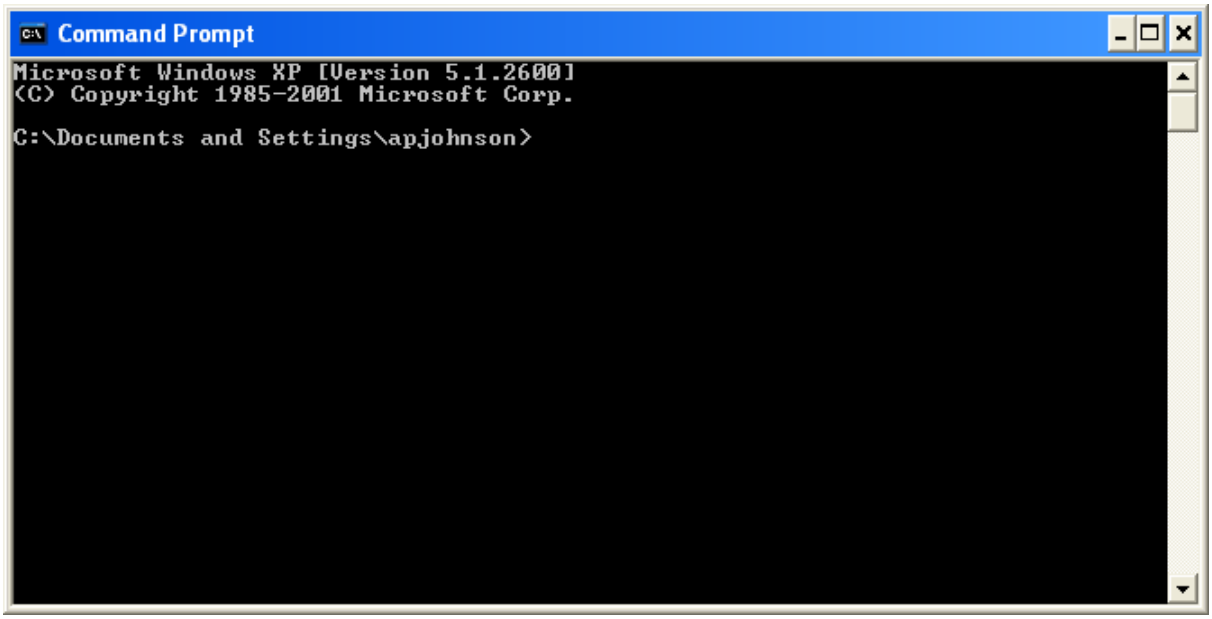
(continued)

Generating the EBS File(s) in DOS

Now you will need to open a command prompt window (DOS) to generate the **EBS** file(s).



26	From the **START** menu, select **ALL PROGRAMS**, then **ACCESSORIES**, and click on **COMMAND PROMPT**.	The **Command Prompt** window will appear.



(*Command Prompt Window*)

Continued on Following Page

Creating the EBS File

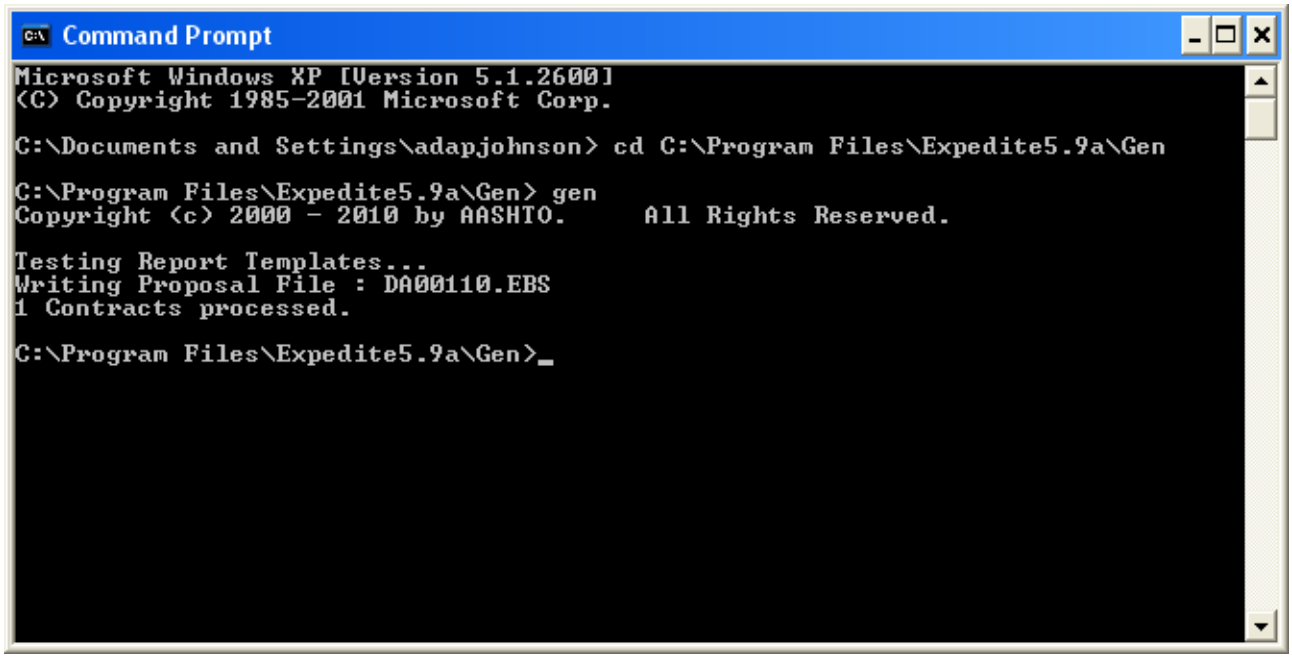
(continued)

27	Type **cd\Program Files\Expedite5.9a\Gen** and press the Enter key	You have changed your current directory.
28	Type **gen** and press the Enter key. **NOTE:** This is the command that will generate the EBS files. The string of characters you typed in Step 27 changed the directory to where the file is located.	The file(s) for use in **Expedite** will appear.

The files will have the following format:

DA00110.EBS

Contract Number



(*Command Prompt Window*)

Continued on Following Page

Creating the EBS File

(continued)

29	Close the **Command Prompt** window.	You have successfully created the ***.EBS** File(s).

NOTE: If you have not yet created the **DBE_NC.BIN** file for this letting, minimize this window by clicking the **MINIMIZE** button in the top-right corner.

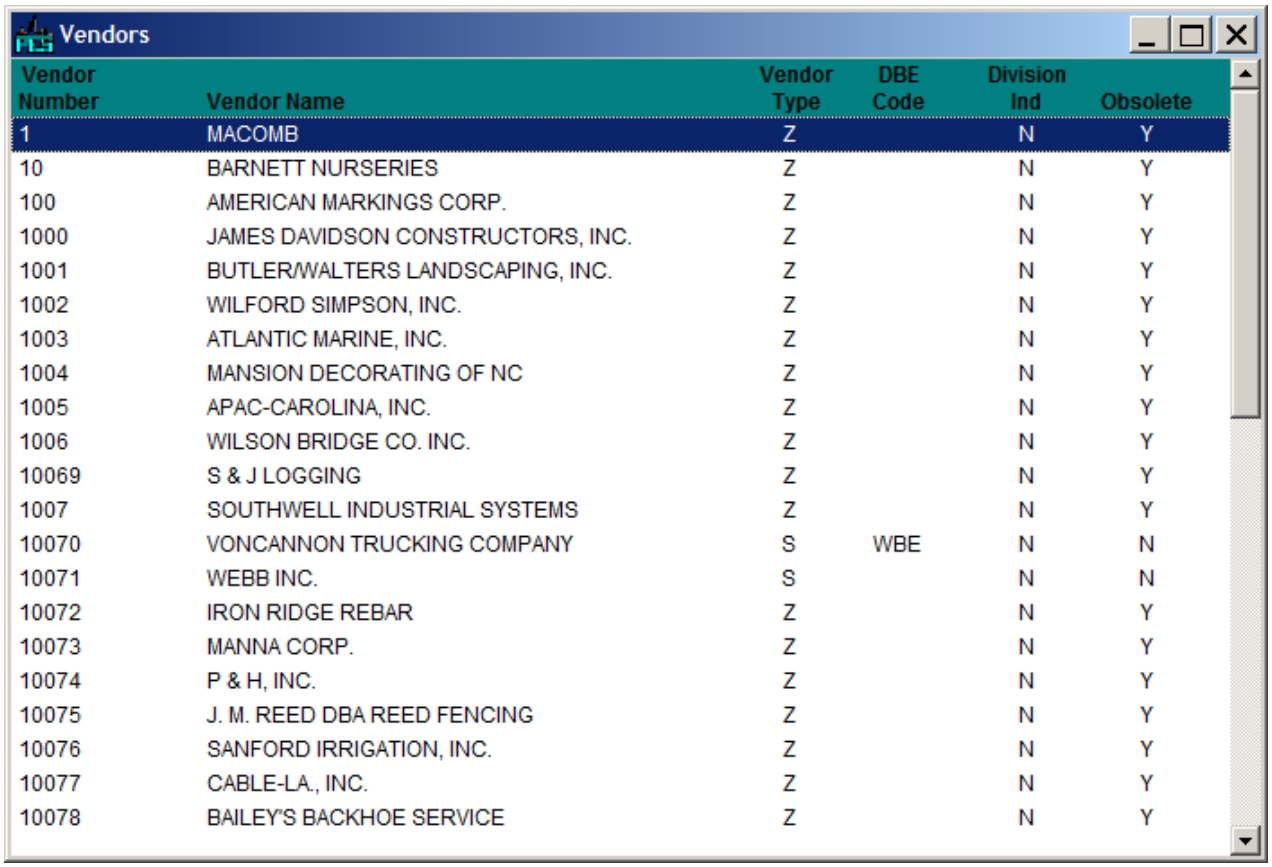
You will need to perform a similar action in the **Command Prompt** window for this file. (See **Creating the DBE_NC.BIN File** on page **8-15**.)

Creating the DBE_NC.BIN File

The **DBE_NC.BIN** file contains a listing of DBE/MBE/WBE firms. It is used with the **EBS** file in **Expedite** and must be placed in the same folder as the **EBS** file.

Once you have successfully logged into **Trns•port PES**:

Step	Action	Result
1	Click the **VENDORS** button.	The **Vendors** window will appear.



Vendors

Vendor Number	Vendor Name	Vendor Type	DBE Code	Division Ind	Obsolete
1	MACOMB	Z		N	Y
10	BARNETT NURSERIES	Z		N	Y
100	AMERICAN MARKINGS CORP.	Z		N	Y
1000	JAMES DAVIDSON CONSTRUCTORS, INC.	Z		N	Y
1001	BUTLER/WALTERS LANDSCAPING, INC.	Z		N	Y
1002	WILFORD SIMPSON, INC.	Z		N	Y
1003	ATLANTIC MARINE, INC.	Z		N	Y
1004	MANSION DECORATING OF NC	Z		N	Y
1005	APAC-CAROLINA, INC.	Z		N	Y
1006	WILSON BRIDGE CO. INC.	Z		N	Y
10069	S & J LOGGING	Z		N	Y
1007	SOUTHWELL INDUSTRIAL SYSTEMS	Z		N	Y
10070	VONCANNON TRUCKING COMPANY	S	WBE	N	N
10071	WEBB INC.	S		N	N
10072	IRON RIDGE REBAR	Z		N	Y
10073	MANNA CORP.	Z		N	Y
10074	P & H, INC.	Z		N	Y
10075	J. M. REED DBA REED FENCING	Z		N	Y
10076	SANFORD IRRIGATION, INC.	Z		N	Y
10077	CABLE-LA., INC.	Z		N	Y
10078	BAILEY'S BACKHOE SERVICE	Z		N	Y

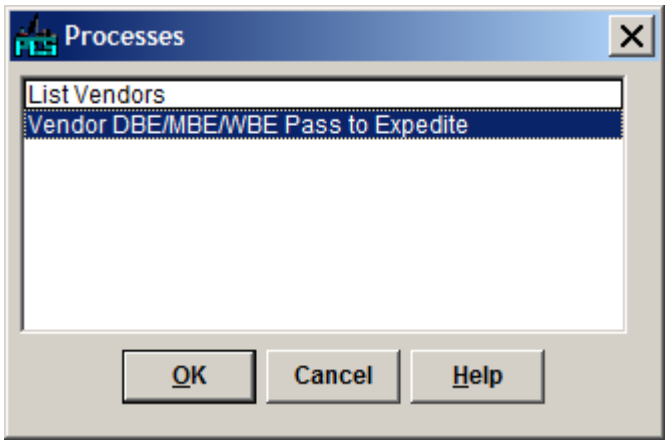
(*Vendors Window*)

2	Select **RUN PROCESS…** from the **FILE** drop-down menu.	The **Processes** dialog will appear.

Continued on Following Page

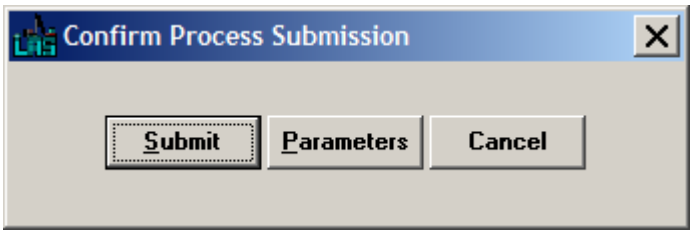
Creating the DBE_NC.BIN File

(continued)



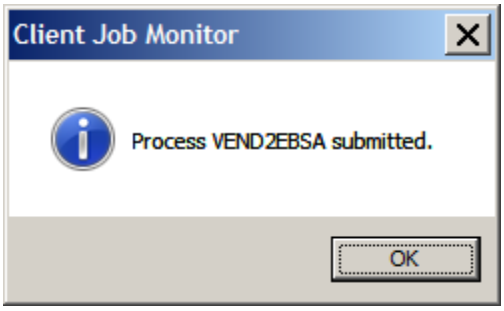
(*Processes Dialog*)

3	Click on **Vendor DBE/MBE/WBE Pass to Expedite** to select it.	N/A
4	Click the **OK** button.	The **Confirm Process Submission** dialog will appear.



5	Click the **SUBMIT** button.	The following message will appear.

NOTE: Make a note of the process name.

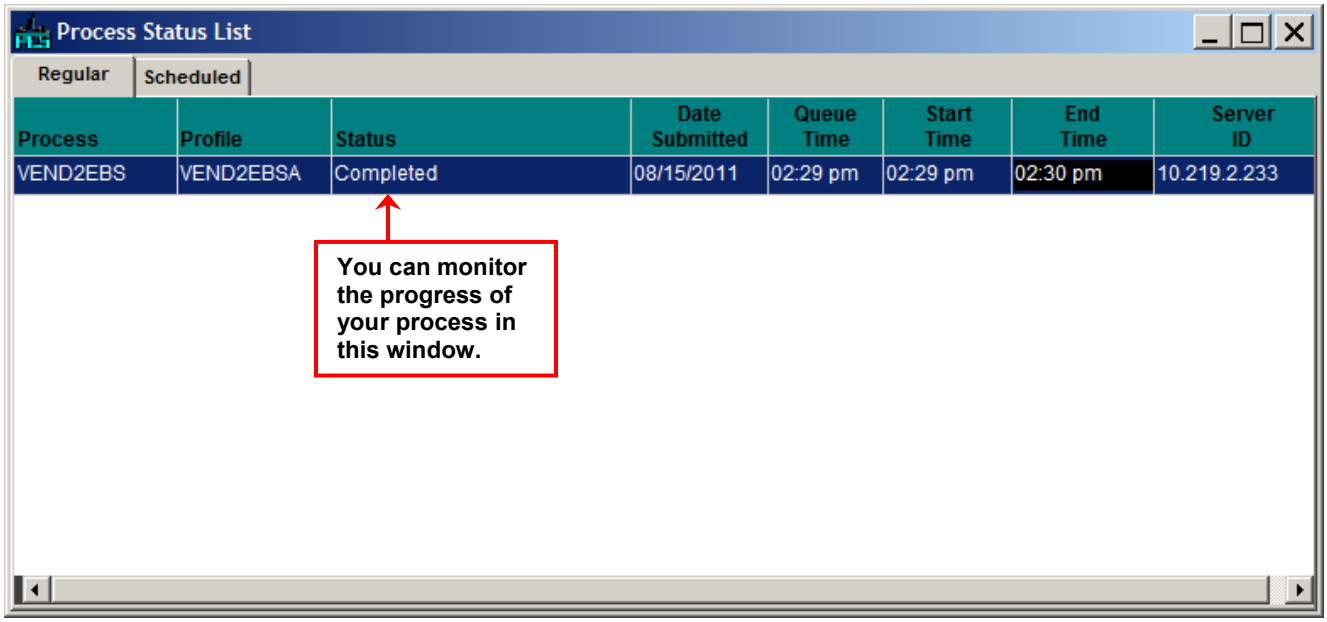


Continued on Following Page

Creating the DBE_NC.BIN File

(continued)

6	After the process has completed, select **PROCESS STATUS** from the **FILE** drop-down menu.	The **Process Status List** window will appear.



(*Process Status List Window*)

After the successful completion of the process, the **OUTPUT.SQF** file is created.

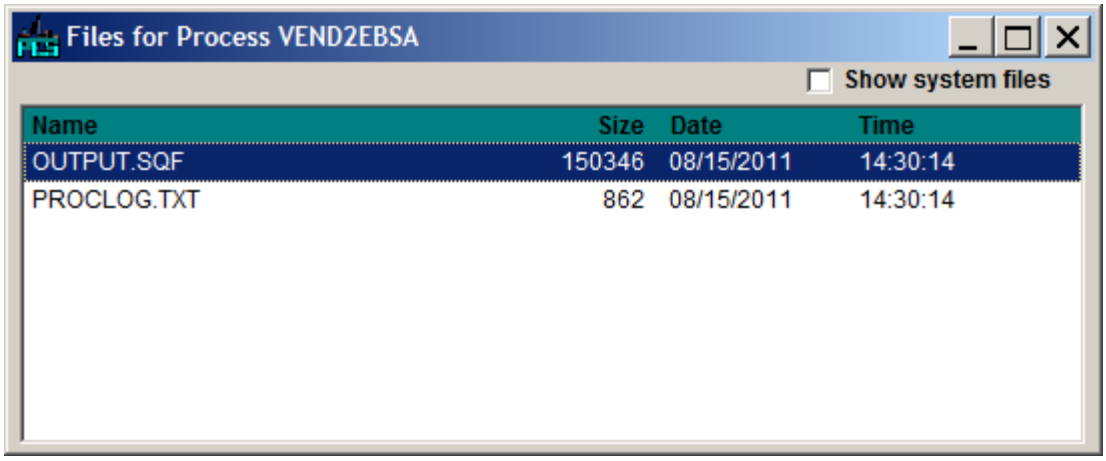
To verify that this file exists:

7	Once completed, double-click the **process name**.	The **Process File List** window will appear.

Continued on Following Page

Creating the DBE_NC.BIN File

(continued)



(*Process File List Window*)

If **OUTPUT.SQF** is not listed, review these steps and troubleshoot your process.

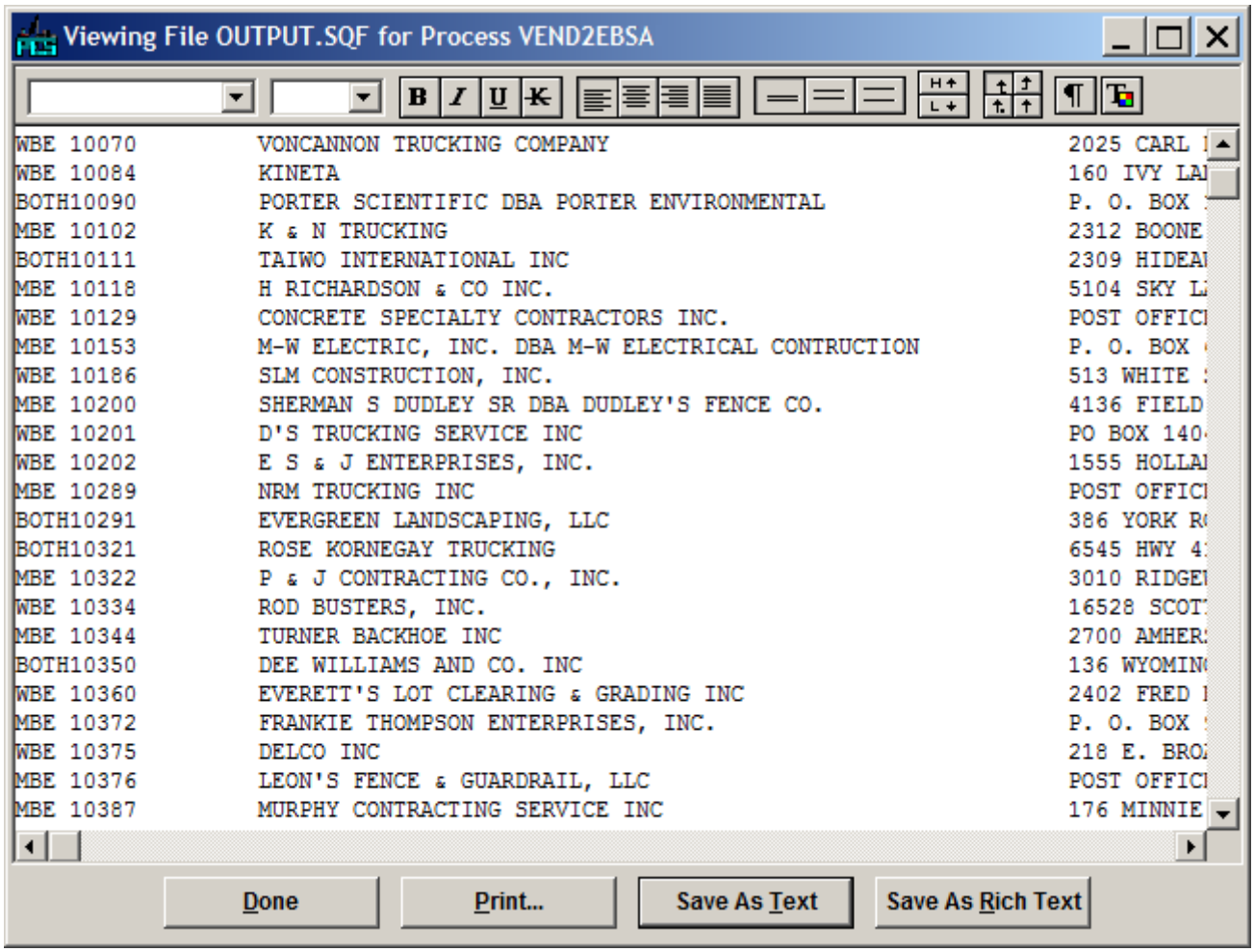
If you are unable to determine the problem, contact the Help Desk.

8	Double-click on the **OUTPUT.SQF** file.	The file will open in a new window.

Continued on Following Page

Creating the DBE_NC.BIN File

(continued)



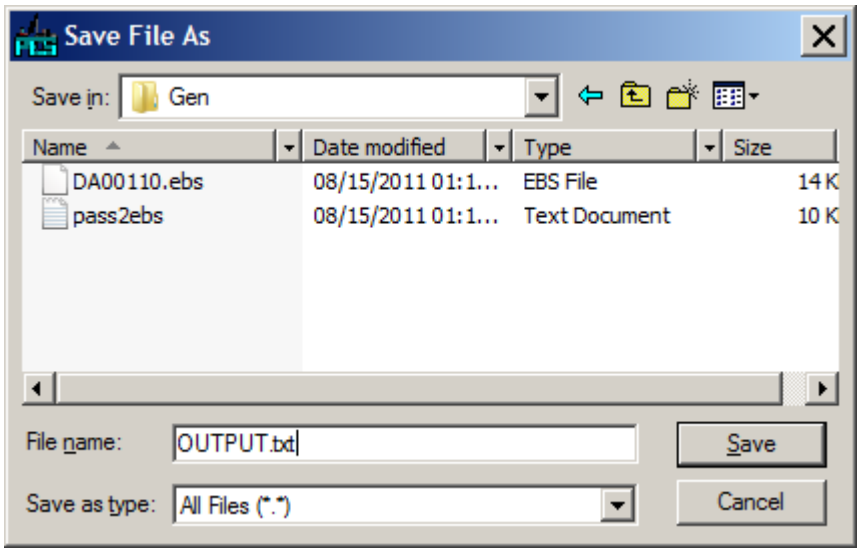
(*Output.SQF File Window*)

9	Select **SAVE AS TEXT** from the menu.	The **Save File As** Dialog will appear.

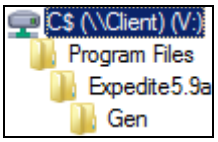
Continued on Following Page

Creating the DBE_NC.BIN File

(continued)



10	Select **C$ (\\Client) (V:)** from the drop-down list in the **SAVE IN** field.	N/A
11	In the **SAVE IN** field. Select **\Program Files\Expedite5.9a\Gen** from the drop-down list.	N/A



12	Type **OUTPUT.TXT** in the **FILE NAME** field.	N/A
13	Click the **SAVE** button.	The file will be saved as **OUTPUT.TXT** in the **c:\Program Files\Expedite5.9a\Gen** directory.

Continued on Following Page

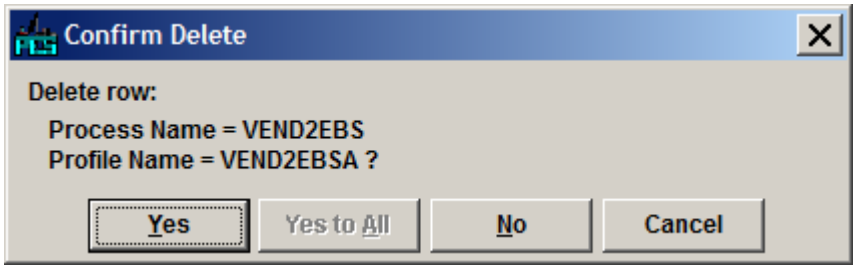
Creating the DBE_NC.BIN File

(continued)

14	Close the **Output.SQF File** window.	You will return to the **Process File List** window.
15	Close the **Process File List** window.	You will return to the **Process Status List** window.

You will need to delete your process from the list.

16	Right-click on the **process name**.	A right-click menu will appear.
17	Select **DELETE** from the menu.	The following message will appear.



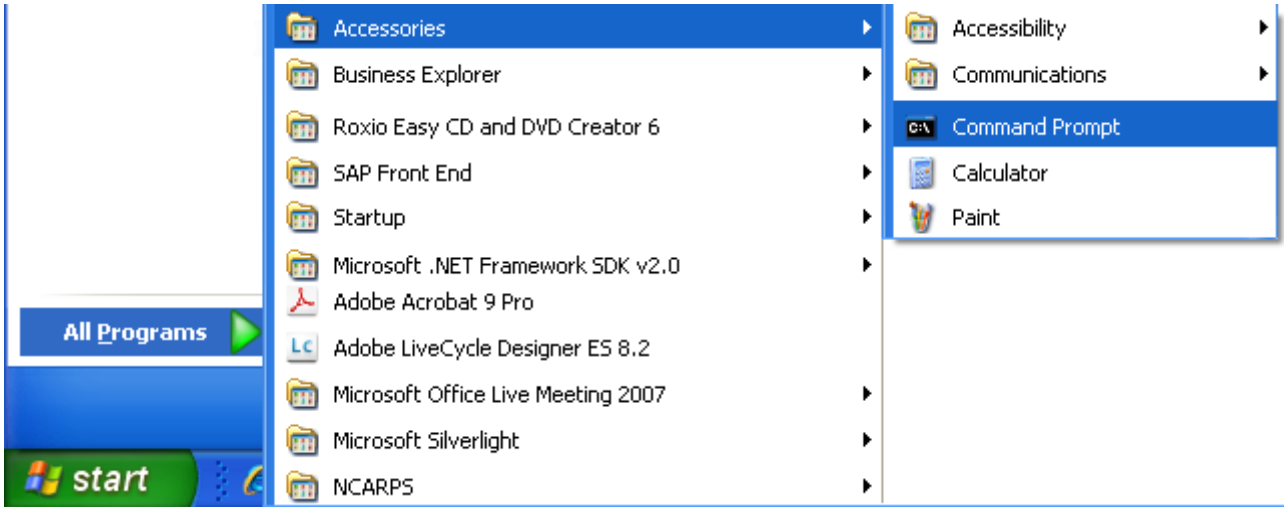
18	Click the **YES** button.	The process will be deleted.
19	Close the **Process Status List** window.	You will return to the **Vendors** window.
20	Close the **Vendors** window.	N/A

Continued on Following Page

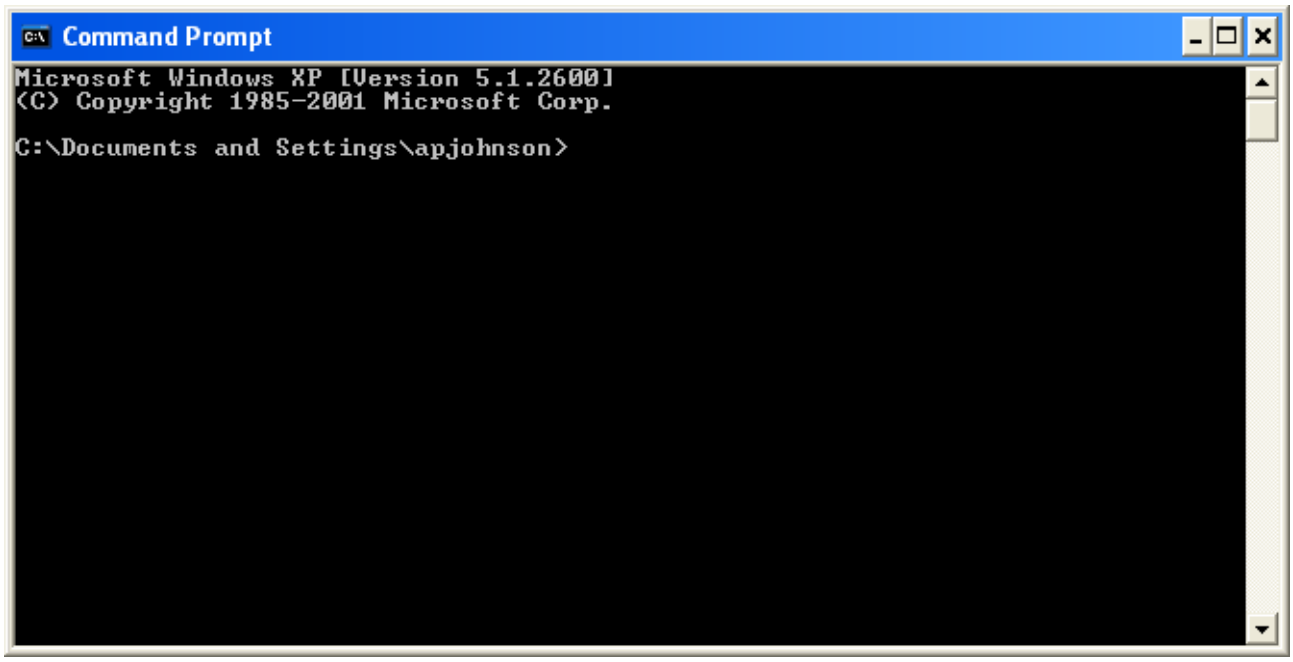
Creating the DBE_NC.BIN File

(continued)

Now you will need to encrypt this file so that it cannot be changed.



Encrypting the File	**21**	From the **START** menu, select **ALL PROGRAMS**, then **ACCESSORIES**, and click on **COMMAND PROMPT**.	The **Command Prompt** window will appear.



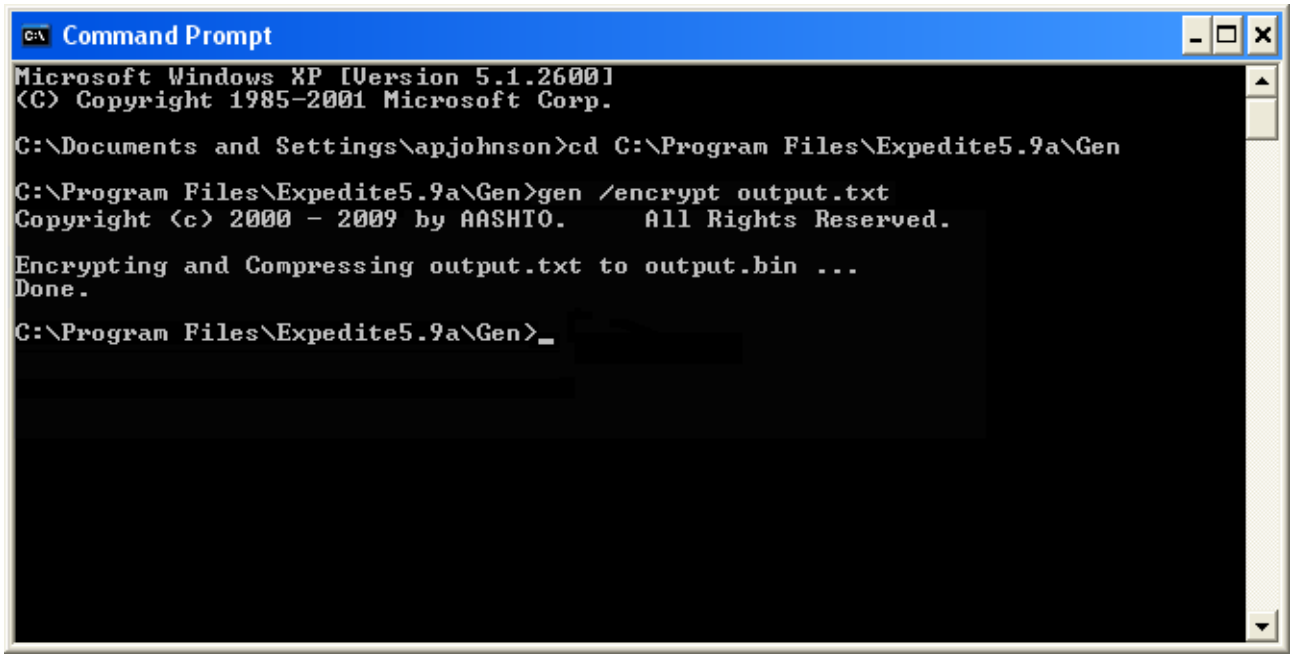
(*Command Prompt Window*)

Continued on Following Page

Creating the DBE_NC.BIN File

(continued)

22	Type **cd\Program Files\Expedite5.9a\Gen** and press the Enter key	N/A
23	Type **gen** Spacebar **/encrypt** Spacebar **output.txt** and press the Enter key.	The **OUTPUT.BIN** file will be created.



(*Command Prompt Window*)

The **OUTPUT.BIN** file will be located in the **C:\Program Files\Expedite5.9a\Gen** directory.

24	Close the **Command Prompt** window.	The **Command Prompt** window will close.

Renaming the File

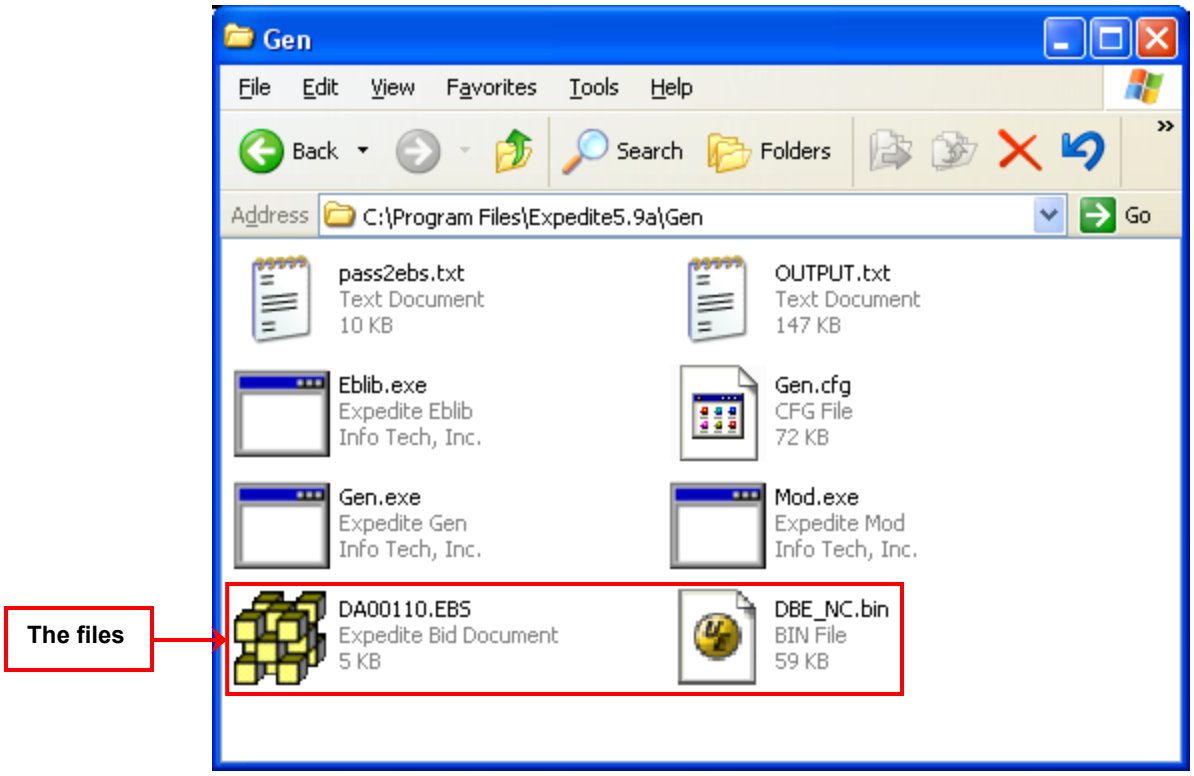
25	In Windows Explorer, navigate to **C:\Program Files\Expedite5.9a\Gen** and rename the **OUTPUT.BIN** file to **DBE_NC.BIN**.	You have successfully created the **DBE_NC.BIN** File.

Creating the Letting Master on Portable Media

Once the **.EBS** and **DBE_NC.BIN** files have been created, you must package them for distribution to the contractors. This can be done via the web, cd, or other portable media.

In **Windows Explorer**:

Step	Action	Result
1	Navigate to the **C:\Program Files\Expedite5.9a\Gen** directory.	



(*C:\Program Files\Expedite5.9a\Gen Directory*)

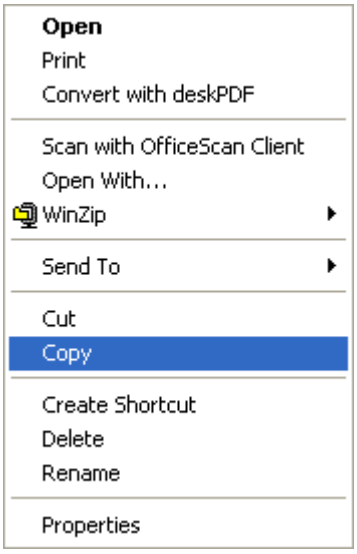
2	Select all **.EBS** proposal files and the **DBE_NC.BIN** file. **NOTE:** Hold down the Ctrl key and click each file you wish to select.	N/A

Continued on Following Page

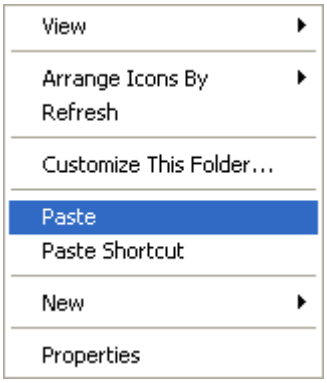
Creating the Letting Master on Portable Media

(continued)

3	Right-click on the selected files.	A right-click menu will appear.



4	Select **COPY** from the menu.	The files will be copied to the Windows clipboard.
5	Navigate to the drive containing the destination media.	N/A
6	Right click anywhere within the destination media folder.	A right-click menu will appear.



Continued on Following Page

Creating the Letting Master on Portable Media

(continued)

7	Select **PASTE** from the menu.	The files will be copied to the destination media.

🗁**NOTE:** The **DBE_NC.BIN** file must be stored in the same directory as the **.EBS** files. Advise contractors of this fact as well.

This group of files is now the **Master** for this **Letting**.

Make copies as needed for distribution to the contractors. These files can also be made available online.

🗁**NOTE:** Before distributing to contractors, make sure all files (including Addendums) can be opened in **Expedite.**

Chapter 9 Additional Pre-Letting Procedures

Adding a Planholder to a Linked Proposal

In the Trns•port system, contracting companies who submit bids for proposals must be associated with each proposal they bid. They are referred to as ***Planholders*** and information about them will be entered for each bid they submit.

By letting day, all the planholders should be added to a proposal you expect to receive bids on. It is recommended that planholders be added all along during the **Advertisement** period in order to cut down the workload on **Letting Day**. This can occur at any time after **Advertisement**.

🗁**NOTE:** If you know your planholders before letting day, you can also enter this information ahead of time.

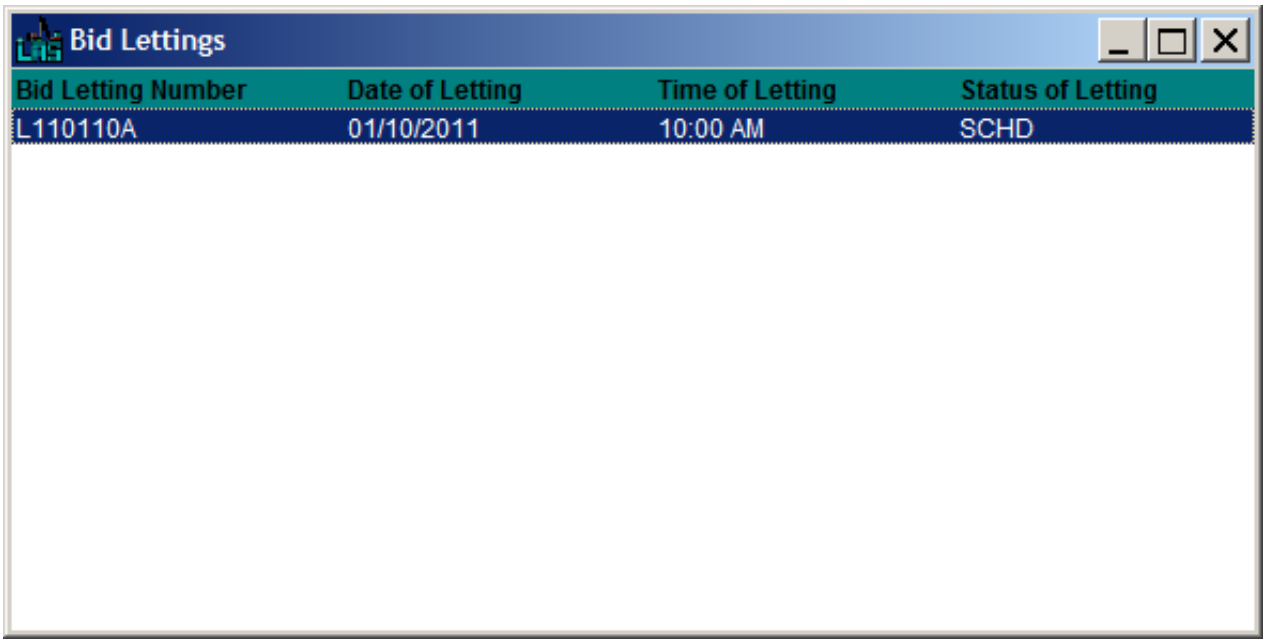
Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.

Continued on Following Page

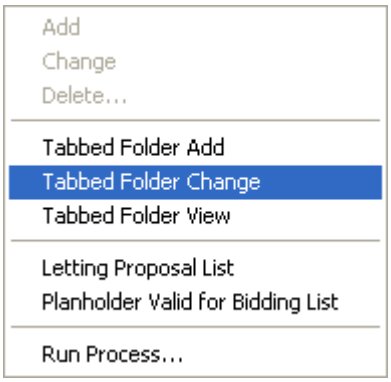
Adding a Planholder to a Linked Proposal

(continued)



(*Bid Lettings Window*)

2	Right-click on the **bid letting** to which you are adding planholder.	A right-click menu will appear.



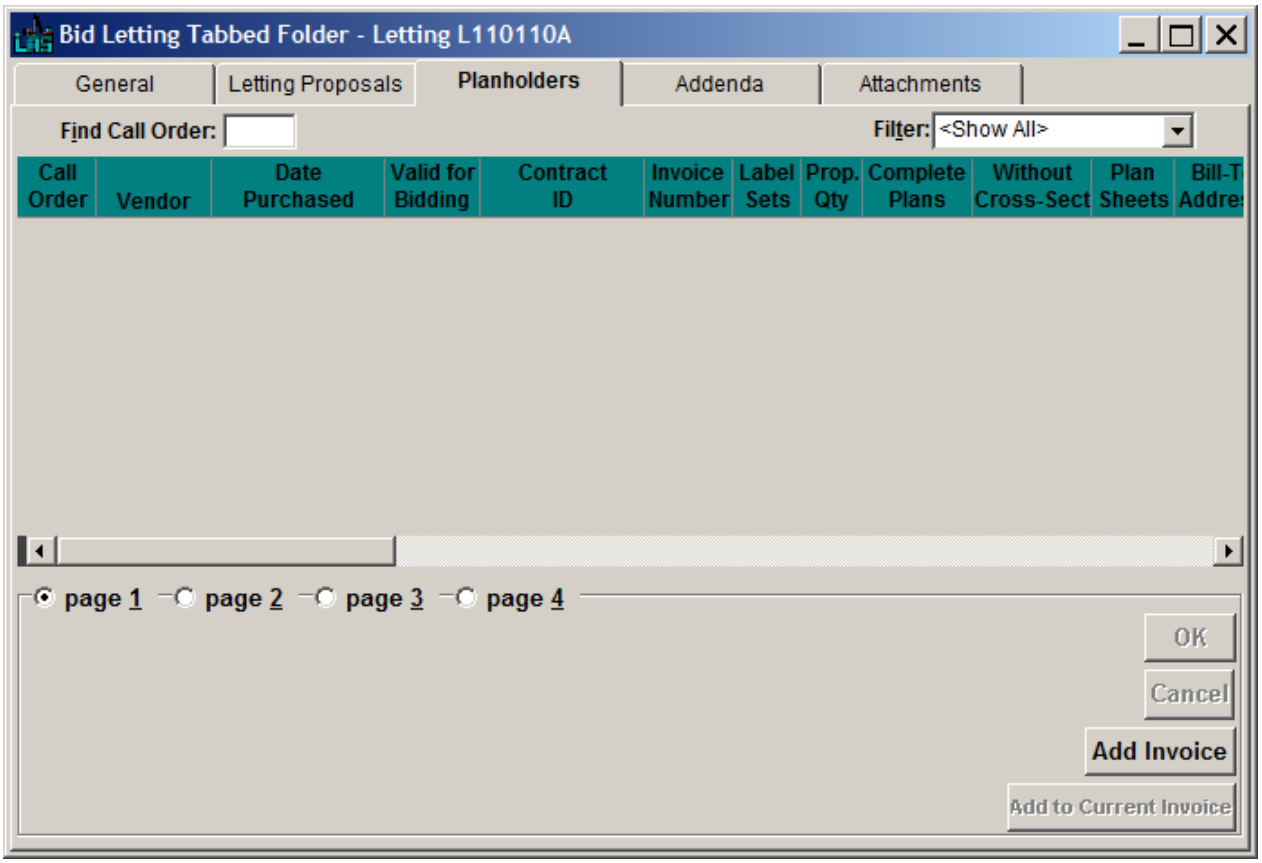
3	Select **TABBED FOLDER CHANGE** from the menu.	The **Bid Letting Tabbed Folder** window will open to the **General** tab.

Continued on Following Page

Adding a Planholder to a Linked Proposal

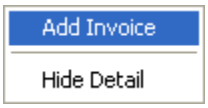
(continued)

4	Click the **Planholders** tab.	The **Planholders** tab will be brought forward.



(*Planholders Tab*)

5	Right-click in the blank area on the **Planholders** tab.	A right-click menu will appear.



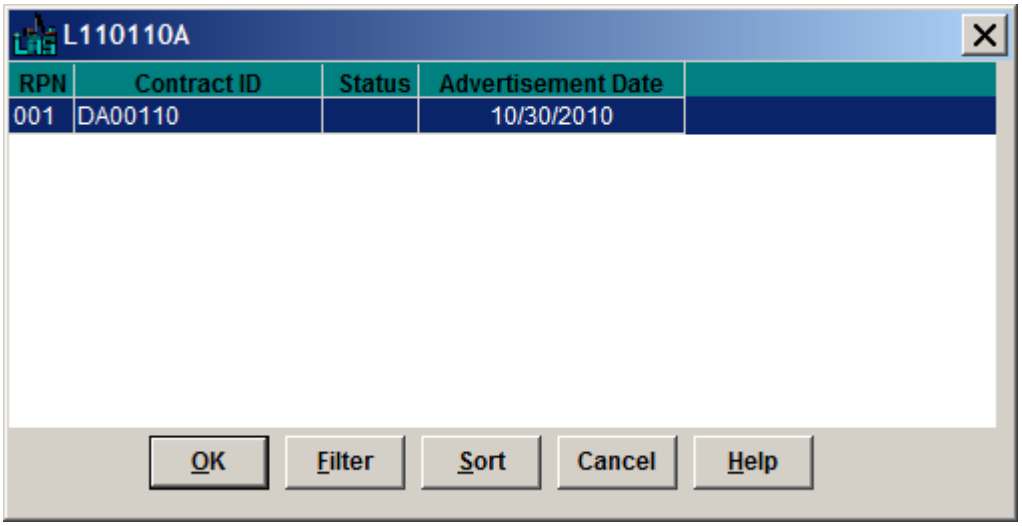
6	Select **ADD INVOICE** from the menu.	A blank line will appear highlighted.

Continued on Following Page

Adding a Planholder to a Linked Proposal

(continued)

7	Click the down-arrow button beside the **CALL ORDER** field	The following dialog will appear.

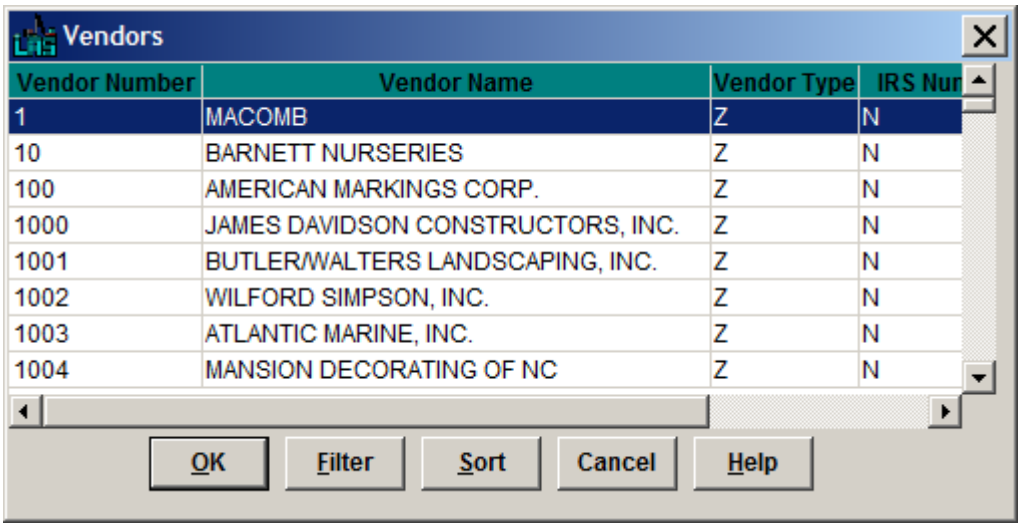


8	Click on the applicable **contract** to select it.	N/A
9	Click the **OK** button.	The **CALL ORDER** field will be filled.
10	Click the down-arrow button beside the **VENDOR** field	The following dialog will appear.

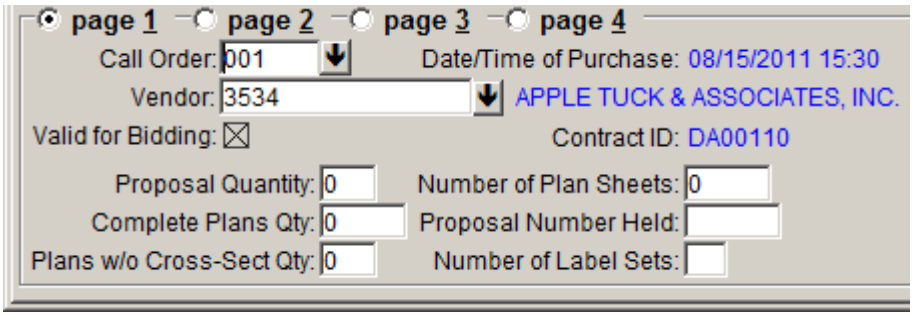
Continued on Following Page

Adding a Planholder to a Linked Proposal

(continued)



11	Click on the applicable **planholder** to select them. 🗁**NOTE:** You can use the **FILTER** button to make it easier to locate the applicable planholder.	N/A
12	Click the **OK** button.	The **VENDOR** field will be filled.



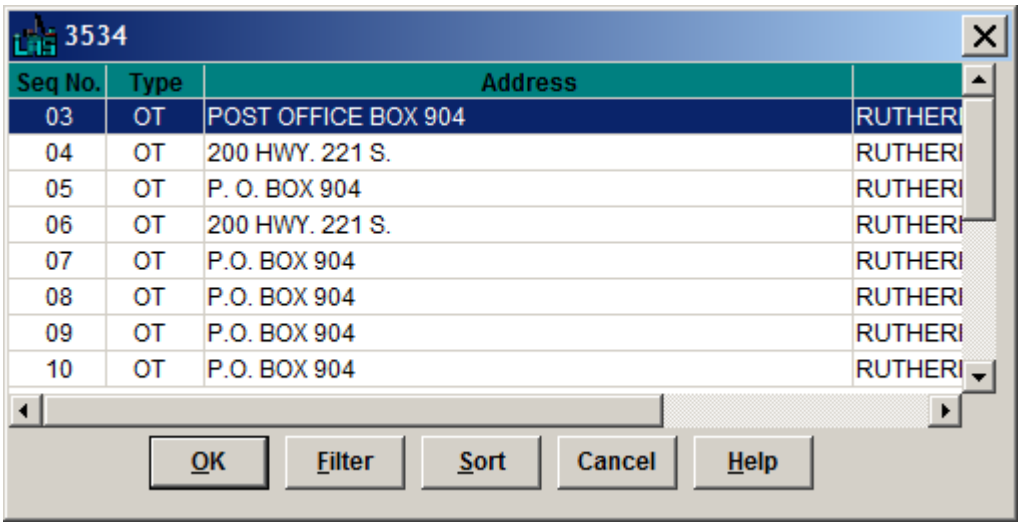
13	Click the **PAGE 2** radio button.	**Page 2** of the **Planholders** tab will appear.

Continued on Following Page

Adding a Planholder to a Linked Proposal

(continued)

14	Click the ↓ down-arrow button beside the **BILL-TO ADDRESS** field	The following dialog will appear.



15	Select the **address** with **PQ** in the **TYPE** column.	N/A

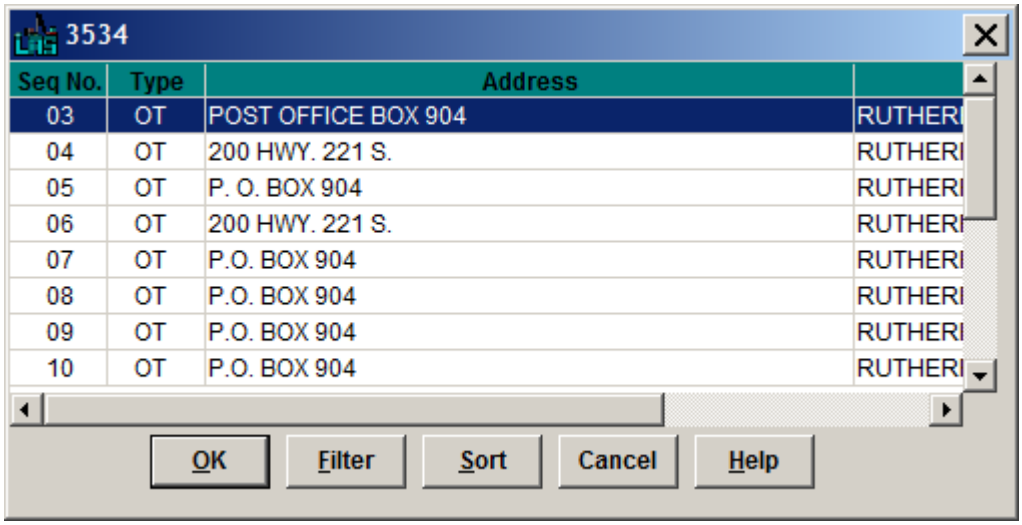
🗁**NOTE:** There may not be a **PQ** (pre-qualified) address for some subcontractors who do small contracts. If this is the case, select the applicable address.

16	Click the **OK** button.	The **BILL-TO ADDRESS** field will be filled.
17	Click the ↓ down-arrow button beside the **SHIP-TO ADDRESS** field	The following dialog will appear.

Continued on Following Page

Adding a Planholder to a Linked Proposal

(continued)



18	Select the **address** with **PQ** in the **TYPE** column.	N/A

NOTE: There may not be a **PQ** (pre-qualified) address for some subcontractors who do small contracts. If this is the case, select the applicable address.

19	Click the **OK** button.	The **SHIP-TO ADDRESS** field will be filled.
20	Click the OK button on the **Planholders** tab.	The record will be added.
21	To add additional planholders, click the Add Invoice button and repeat steps **7-20**.	
22	Click the **SAVE FOLDER** button.	The information on the Planholders tab will be saved

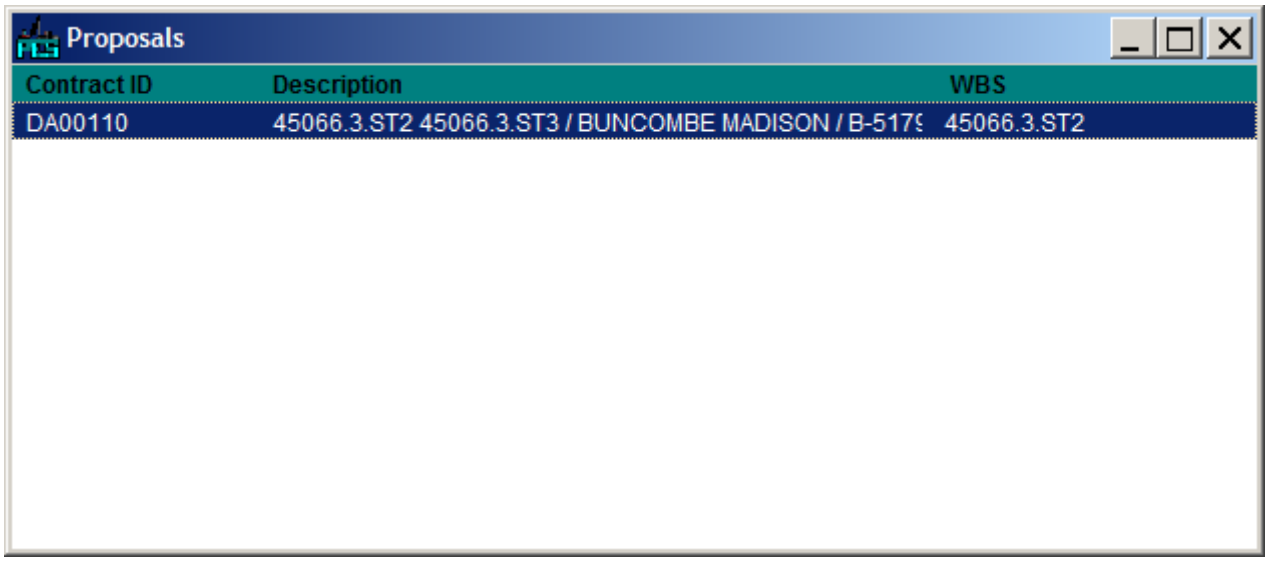
Chapter 10 Addenda

Occasionally, after a proposal has been advertised and the files are in contractor's hands to enter bids, changes may need to be made to the status of an item, quantity, or any information that was originally sent out. To facilitate these changes, NCDOT uses an addendum process to amend the information that was distributed to the contractors.

Adding an Addendum Item

Once you have successfully logged into **Trns•port PES**:

Step	Action	Result
1	Click the **PROPOSALS** button.	The **Proposals** window will appear.



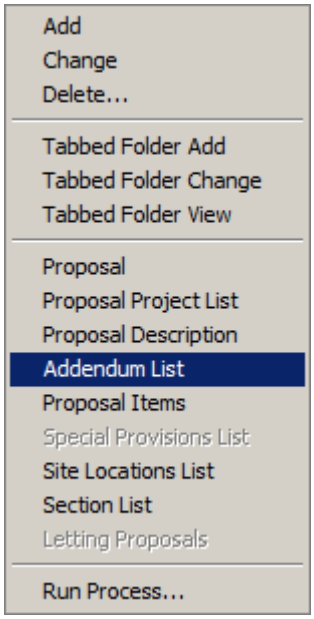
(*Proposals Window*)

2	Right-click on the **proposal** to which you wish to add an addendum.	A right-click menu will appear.

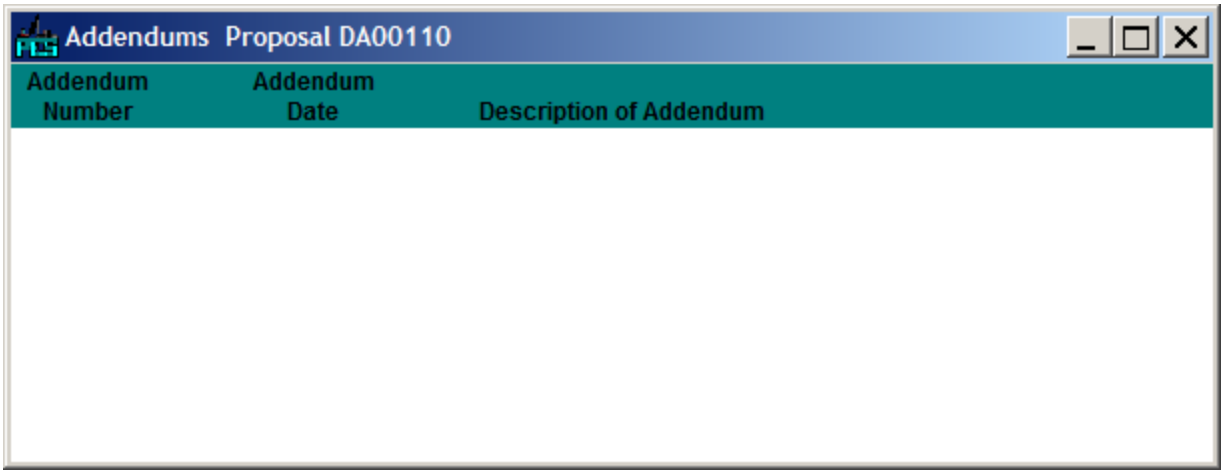
Continued on Following Page

Adding an Addendum Item

(continued)



3	Select **ADDENDUM LIST** from the menu.	The **Addendums** window will appear.



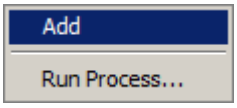
(*Addendums Window*)

4	Right-click in the blank area of the window.	A right-click menu will appear.

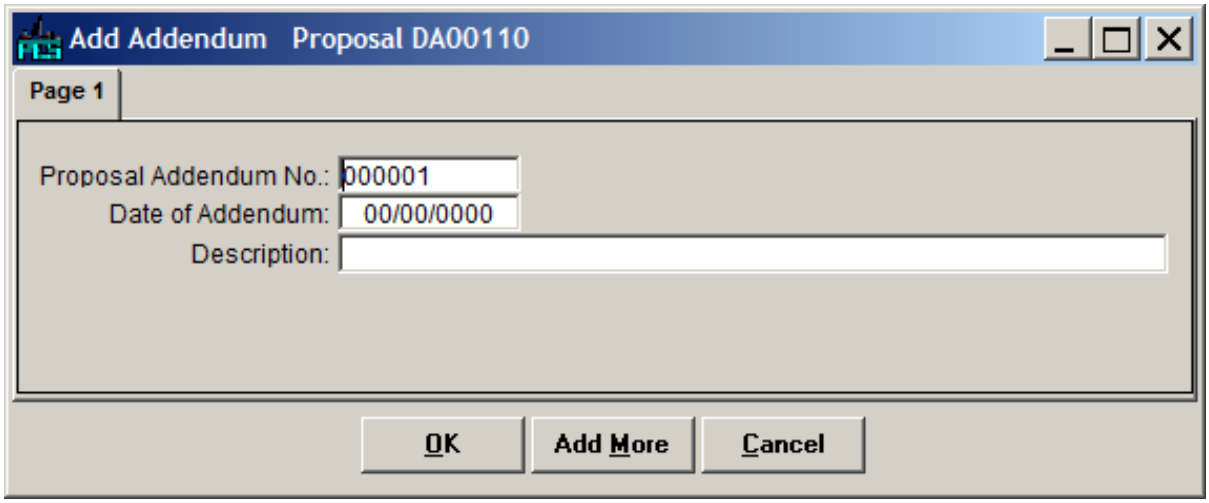
Continued on Following Page

Adding an Addendum Item

(continued)



5	Select **ADD** from the menu.	The **Add Addendum** window will appear.



(*Add Addendum Window*)

NOTE: The **PROPOSAL ADDENDUM NO.** field will contain the next available addendum number in sequence.

6	Type the **date** in the **DATE OF ADDENDUM** field.	N/A
7	Type a **description** of the addendum in the **DESCRIPTION** field.	N/A
8	Click the **OK** button.	This information will be saved.

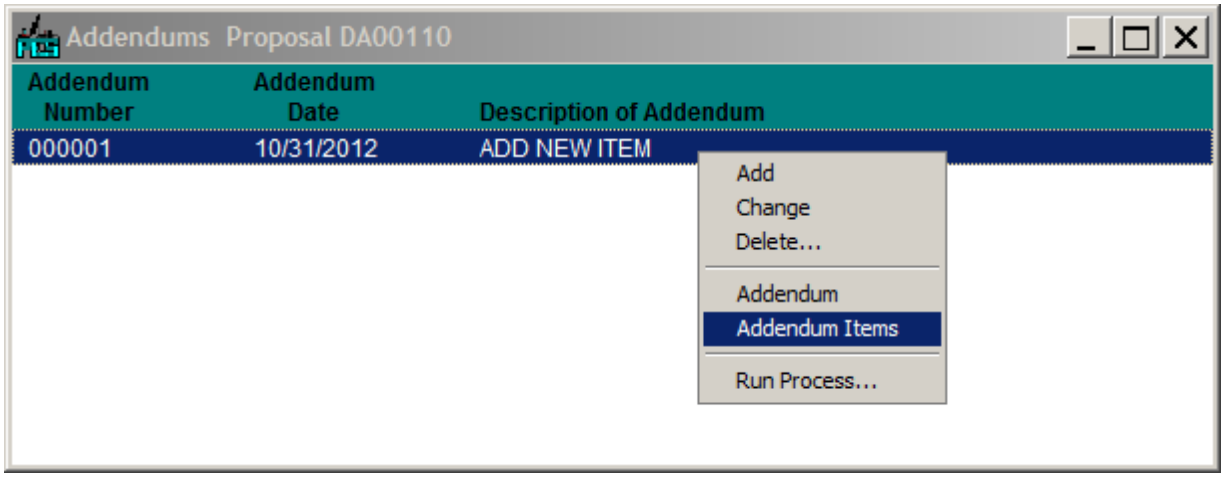
You will return to the **Addendums** window. The new addendum will appear in the list.

9	Right-click on the **Addendum** you just added.	A right-click menu will appear.

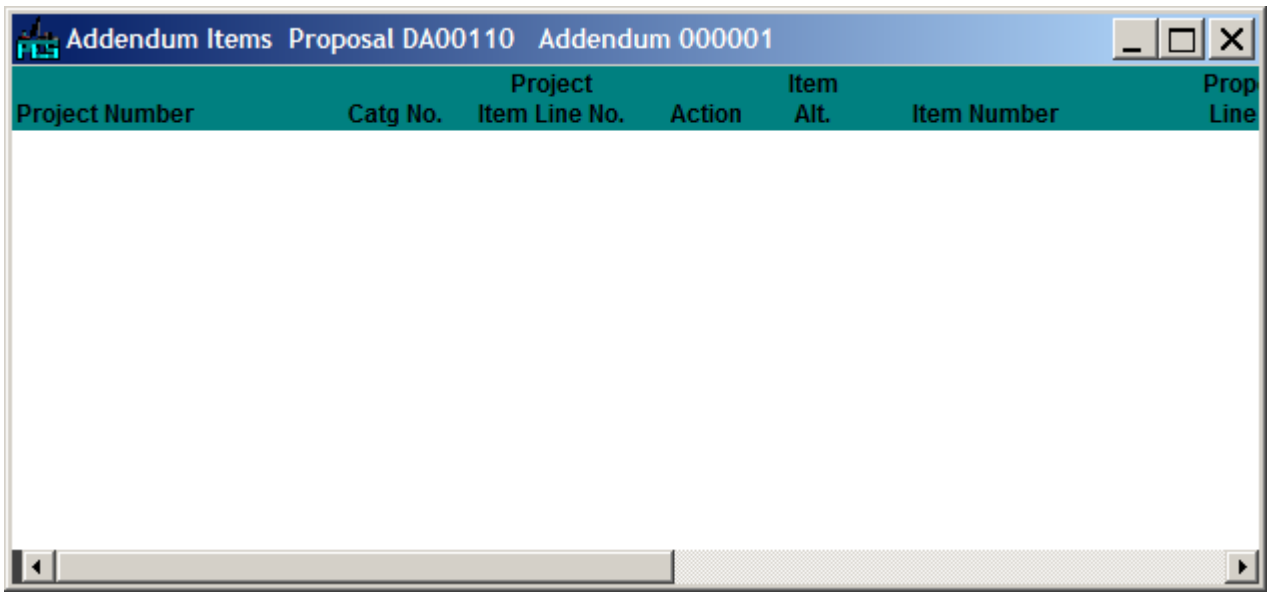
Continued on Following Page

Adding an Addendum Item

(continued)



10	Select **ADDENDUM ITEMS** from the menu.	The **Addendums** window will appear.



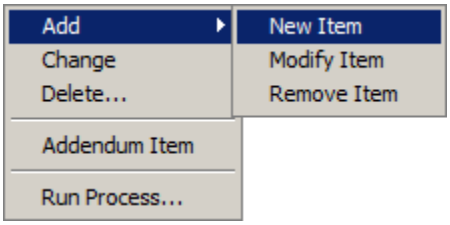
(*Addendum Items Window*)

11	Right-click in the blank area of the window.	A right-click menu will appear.

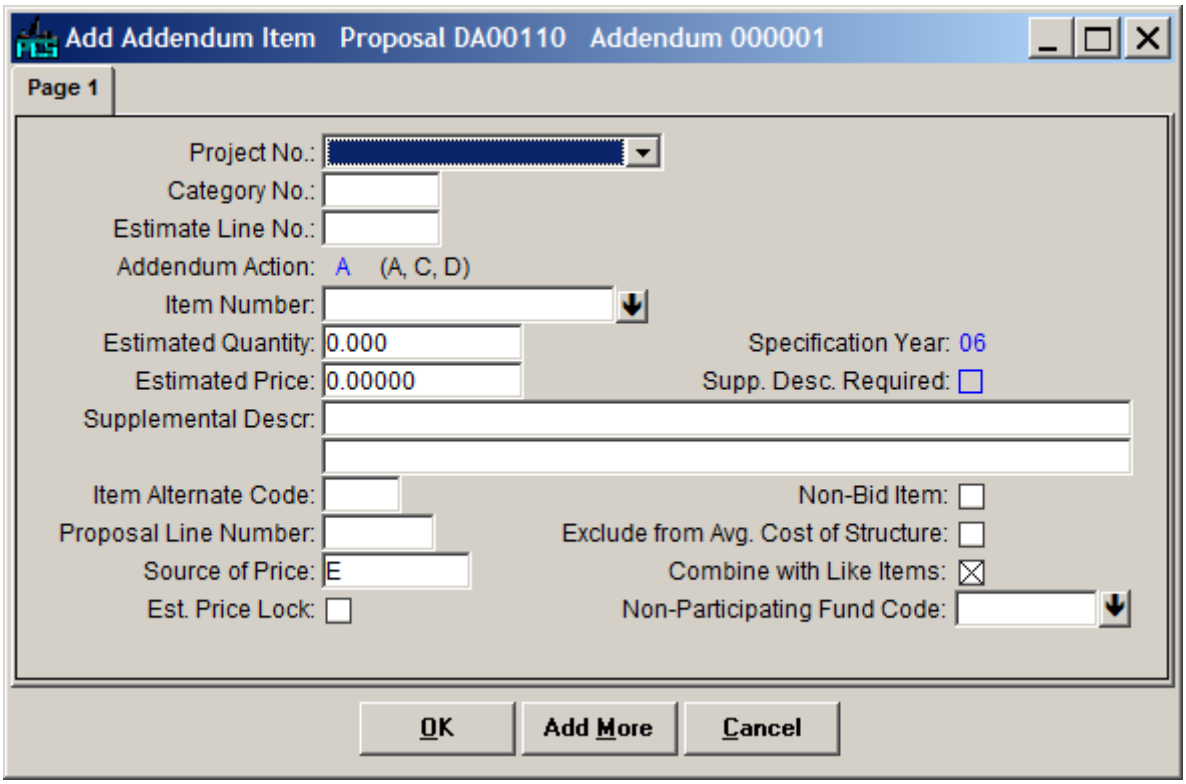
Continued on Following Page

Adding an Addendum Item

(continued)



12	Select **ADD**, then **NEW ITEM** from the menu.	The **Add Addendum Item** window will appear.



(*Add Addendum Item Window*)

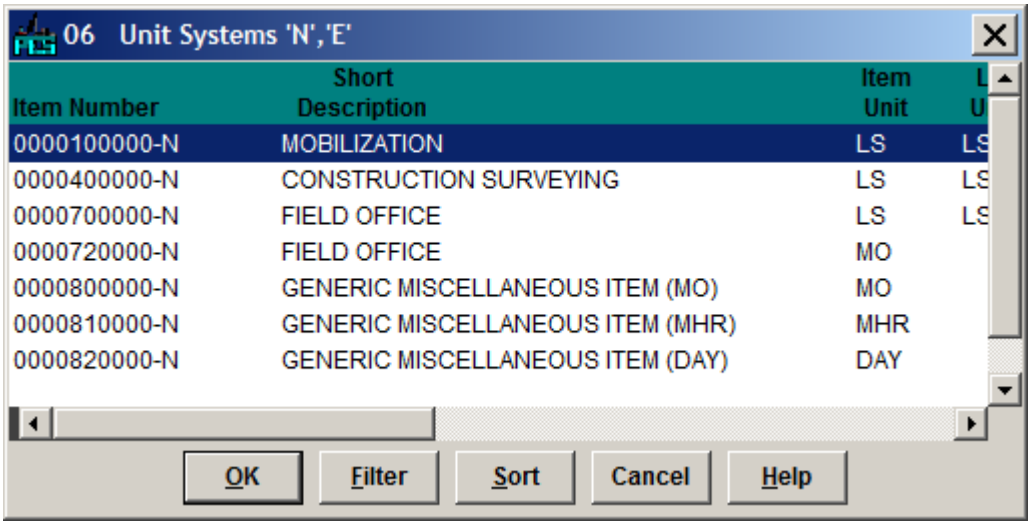
13	Select the **project number** from the drop-down list in the **PROJECT NO.** field.	N/A

Continued on Following Page

Adding an Addendum Item

(continued)

14	Select the **related item category** from the drop-down list in the **CATEGORY NO.** field. 🗁**NOTE:** Since some projects may have multiple structures or Non-Participating work, select the appropriate category for the funding source to which the addendum refers.	N/A
15	Type the **line number** in the **ESTIMATE LINE NO.** field. 🗁**NOTE:** Before keying in this line number, you should determine where you want your item to show up in the worksheet and use a number that will place it where you want it. You don't want to use duplicate line numbers.	N/A
16	Click the ⬇ down-arrow button beside the **ITEM NUMBER** field.	The **Items** dialog will appear.



(*Items Dialog*)

Continued on Following Page

Adding an Addendum Item

(continued)

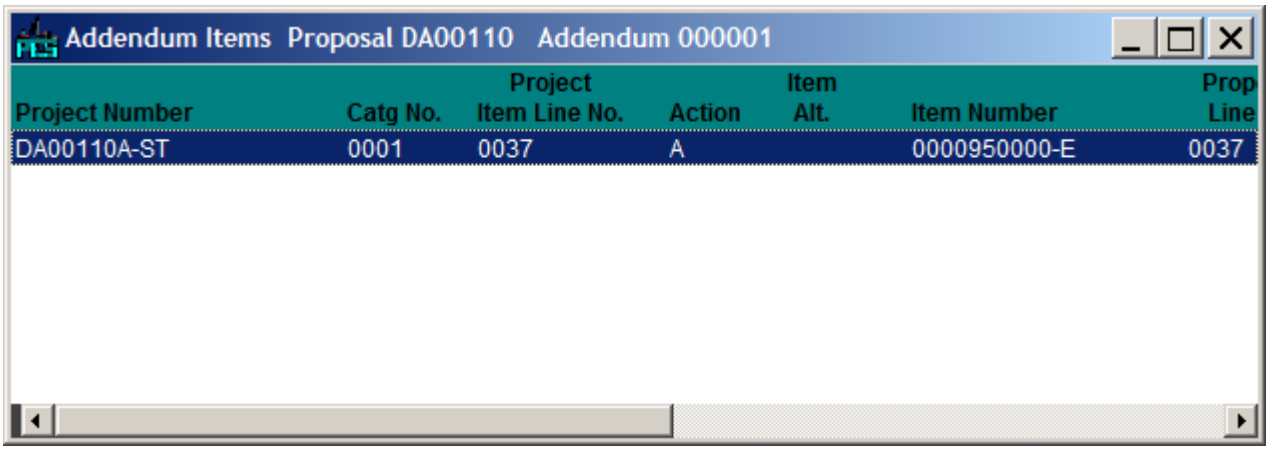
17	Click on the item to select it. 🗁**NOTE:** To make it easier to find specific items, see **Filtering Data in the Item List** on page **3-42** or **Creating a Saved Filter** on page **3-45**.	The item number will appear in the **ITEM NUMBER** field.
18	Type the **quantity** in the **ESTIMATED QUANTITY** field.	N/A
19	Type the **price** in the **ESTIMATED PRICE** field.	N/A
20	If applicable, type the **alternate item code** in the **ITEM ALTERNATE CODE** field.	N/A
21	Type the **proposal line number** in the **PROPOSAL LINE NUMBER** field**.** 🗁**NOTE:** This should be the next proposal line number in sequence. (By adding this number to the end of the other line numbers, all previous references to line numbers do not need to be revisited. **Always add items to the end of the items list, never to the middle.)**	N/A
22	**E** (Estimated) will default in the **SOURCE OF PRICE** field. Do not change it.	N/A
23	Ensure the **EST PRICE LOCK** check box is unchecked. 🗁**NOTE:** This is **VERY** important! If this box remains checked, it will lock in the estimated price as the contractor's bid and it will be unable to be changed.	N/A

Continued on Following Page

Adding an Addendum Item

(continued)

24	Check the **COMBINE WITH LIKE ITEMS** check box.	N/A
25	If applicable, check the **EXCLUDE FROM AVERAGE COST OF STRUCTURE** check box.	N/A
26	If there are additional items to add, click the **Add More** button and repeat steps 2-14.	
27	If item entry is complete, click the **OK** button.	The item will be listed in the **Addendum Items** window.



(*Addendum Items Window*)

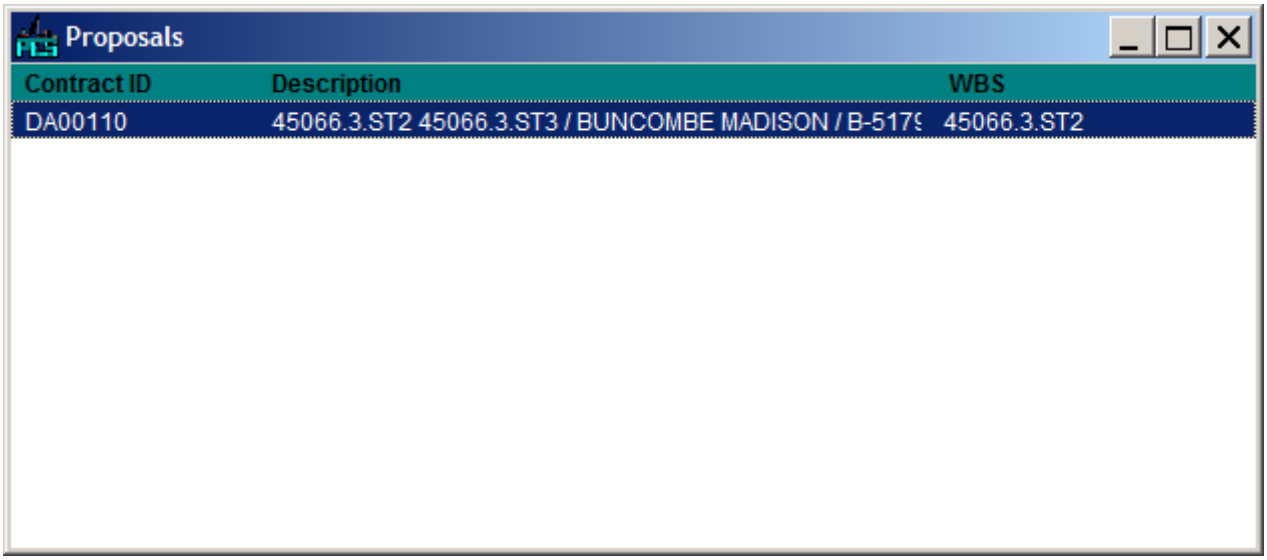
28	After you **Add**, **Modify**, or **Remove** an item, you must re-initialize the letting proposal. See **Initializing Letting Proposals** on page **6-25**.

Creating an Addendum for Item Modification

If an item in the proposal has been distributed to contractors and needs to be modified, an addendum for item modification should be created and distributed to all proposal/planholders. It will modify the previous addendum item for that proposal line number.

Once you have successfully logged into **Trns•port PES**:

Step	Action	Result
1	Click the **PROPOSALS** button.	The **Proposals** window will appear.



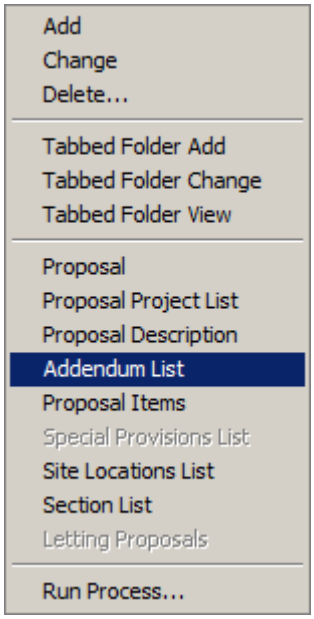
(*Proposals Window*)

2	Right-click on the **proposal** to which you wish to add an addendum.	A right-click menu will appear.

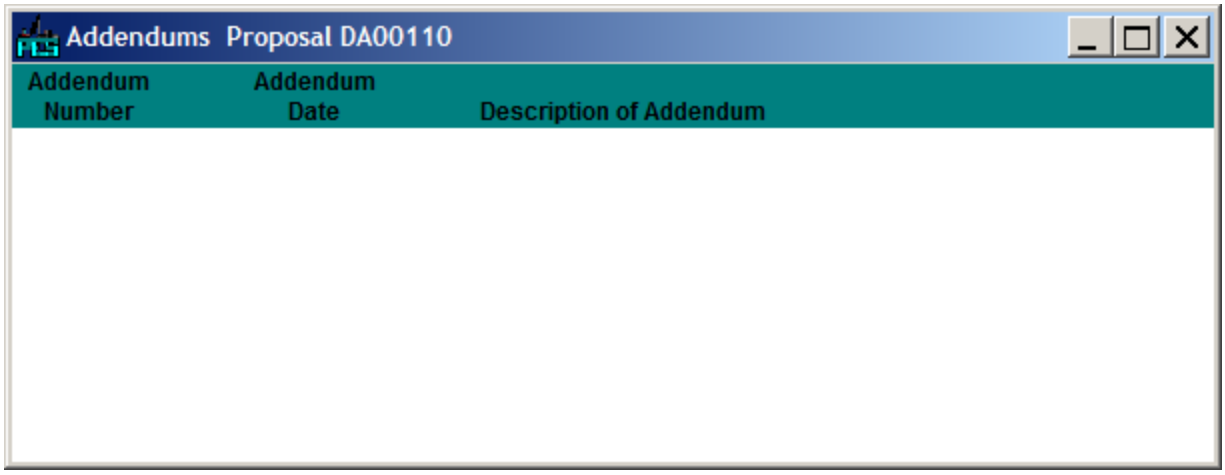
Continued on Following Page

Creating an Addendum for Item Modification

(continued)



3	Select **ADDENDUM LIST** from the menu.	The **Addendums** window will appear.



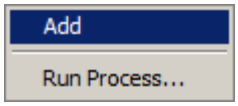
(*Addendums Window*)

4	Right-click in the blank area of the window.	A right-click menu will appear.

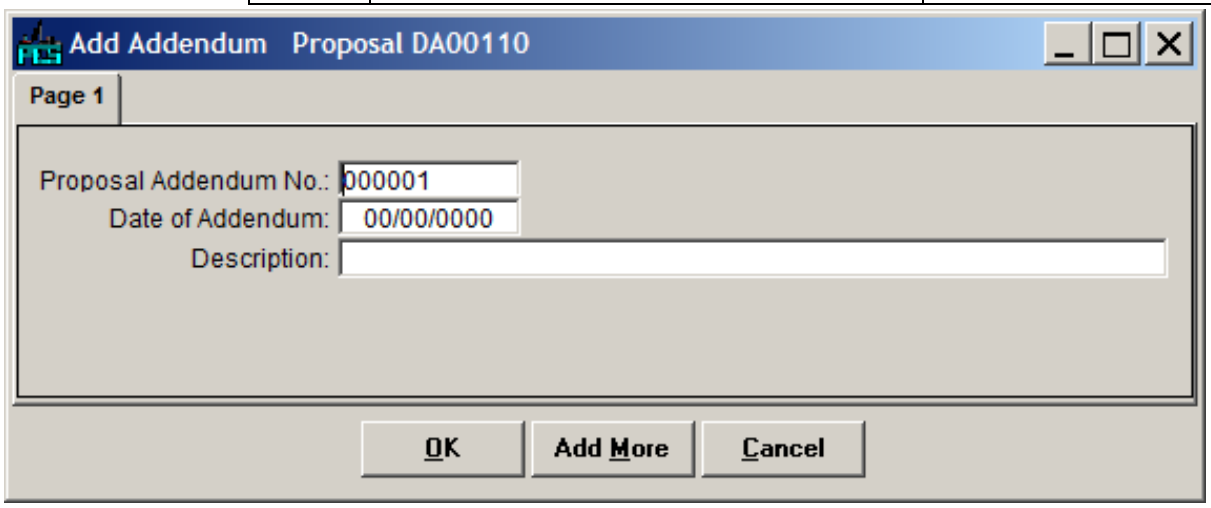
Continued on Following Page

Creating an Addendum for Item Modification

(continued)



5	Select **ADD** from the menu.	The **Add Addendum** window will appear.



(*Add Addendum Window*)

NOTE: The **PROPOSAL ADDENDUM NO.** field will contain the next available addendum number in sequence.

6	Type the **date** in the **DATE OF ADDENDUM** field.	N/A
7	Type a **description** of the addendum in the **DESCRIPTION** field.	N/A
8	Click the **OK** button.	This information will be saved.

You will return to the **Addendums** window. The new addendum will appear in the list.

9	Right-click on the **Addendum** you just added.	A right-click menu will appear.

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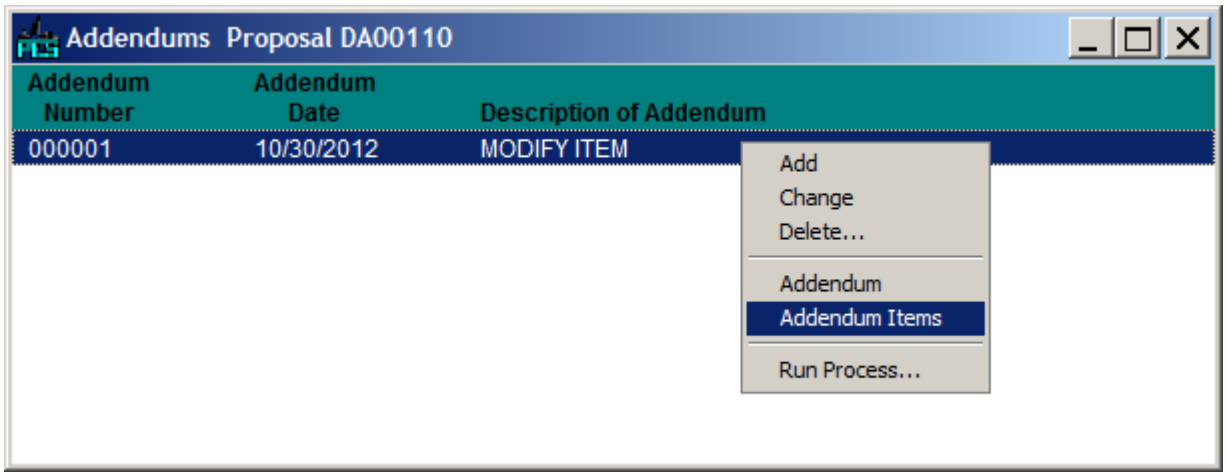
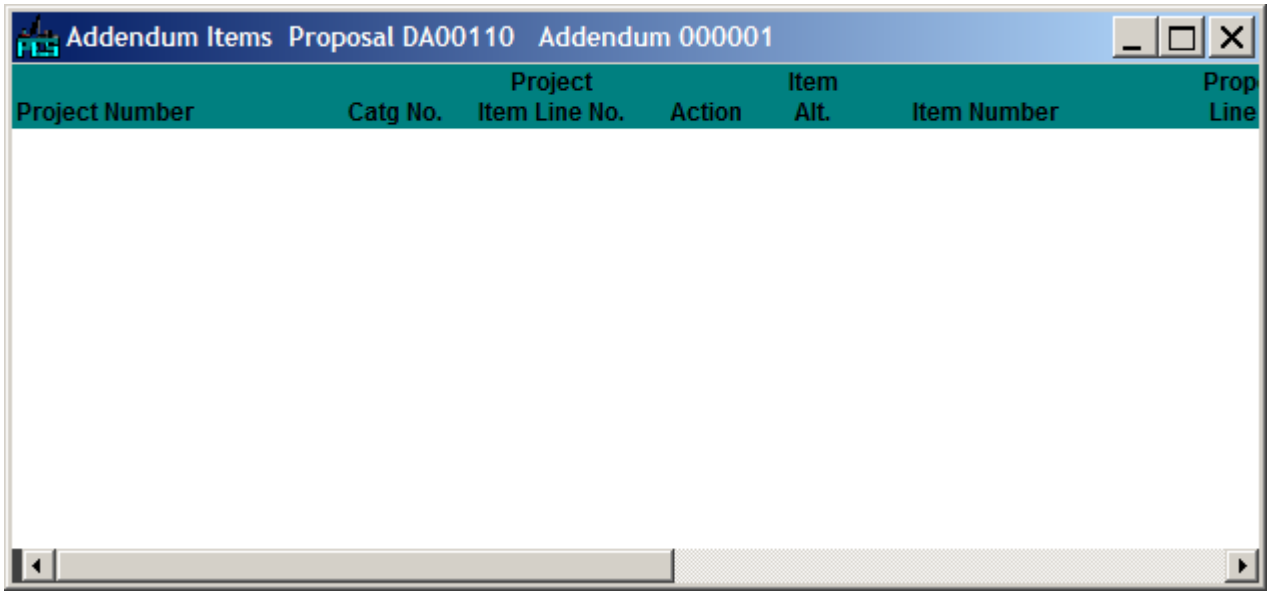
Creating an Addendum for Item Modification

(continued)



10	Select **ADDENDUM ITEMS** from the menu.	The **Addendums** window will appear.



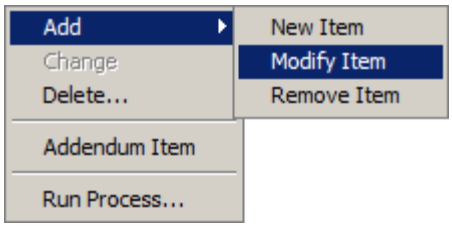
(*Addendum Items Window*)

11	Right-click in the blank area of the window.	A right-click menu will appear.

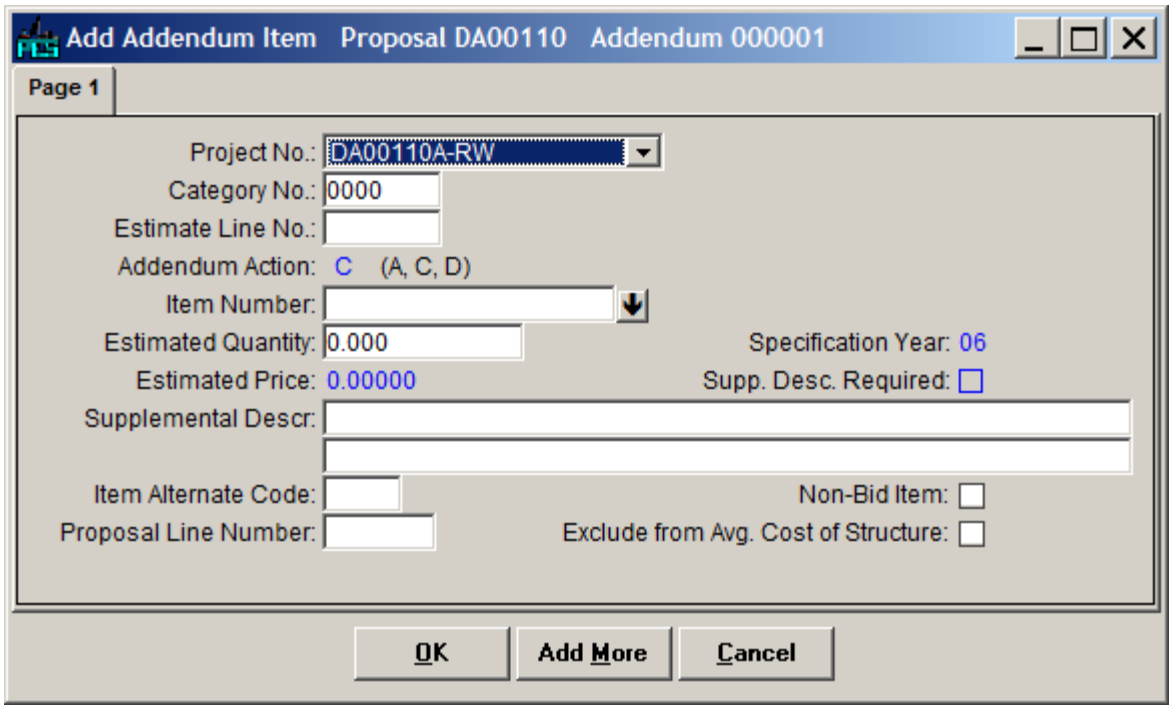
Continued on Following Page

Creating an Addendum for Item Modification

(continued)



12	Select **ADD**, then **MODIFY ITEM** from the menu.	The **Add Addendum Item** window will open.



(*Add Addendum Item Window - Change*)

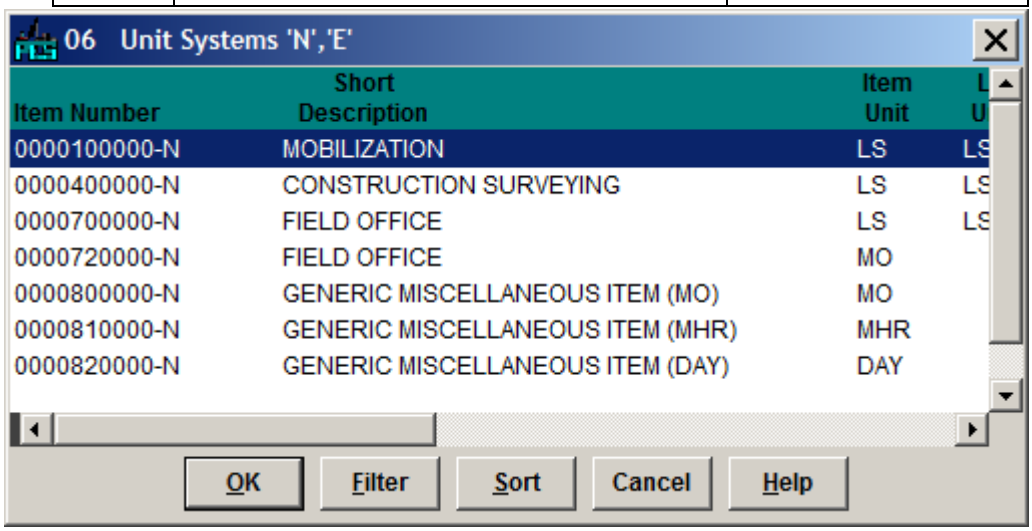
13	If applicable, select the correct **project number** from the drop-down list in the **PROJECT NO.** field.	N/A
14	Select the **correct category number** from the drop-down list in the **CATEGORY NO.** field.	N/A

Continued on Following Page

Creating an Addendum for Item Modification

(continued)

15	Select the correct estimate line number from the drop-down list in the Estimate Line No. field.	The item information will appear.
16	Click the ⬇ down-arrow button beside the Item Number field.	The Items dialog will appear.



(*Items Dialog*)

17	Click on the item to select it. 🗁**NOTE:** To make it easier to find specific items, see **Filtering Data in the Item List** on page **3-42** or **Creating a Saved Filter** on page **3-45**.	The item number will appear in the **ITEM NUMBER** field.
18	Type the **quantity** in the **ESTIMATED QUANTITY** field.	N/A
19	If applicable, type the **supplemental description** in the **SUPPLEMENTAL DESCR** field.	N/A
20	If applicable, type the **alternate item code** in the **ITEM ALTERNATE CODE** field.	N/A

Continued on Following Page

Creating an Addendum for Item Modification

(continued)

21	If applicable, type the **proposal line number** in the **PROPOSAL LINE NUMBER** field.	N/A
22	Click the OK button.	The new Addendum will be listed in the **Addendum Items** window.

After you **Add**, **Modify**, or **Remove** an item, you must re-initialize the letting proposal.

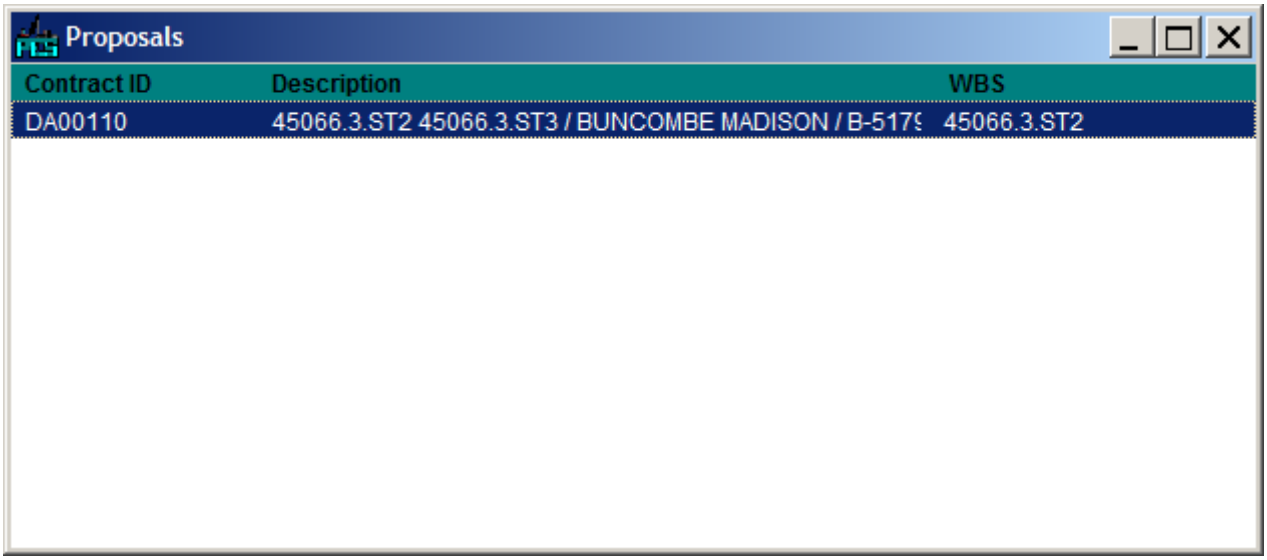
See **Initializing Letting Proposals** on page **6-25**.

Creating an Addendum for Item Removal

If an item in the proposal has been distributed to contractors and needs to be removed, an addendum for item removal should be created and distributed to all proposal/planholders. It will remove the previous addendum item for that proposal line number.

Once you have successfully logged into **Trns•port PES**:

Step	Action	Result
1	Click the **PROPOSALS** button.	The **Proposals** window will appear.



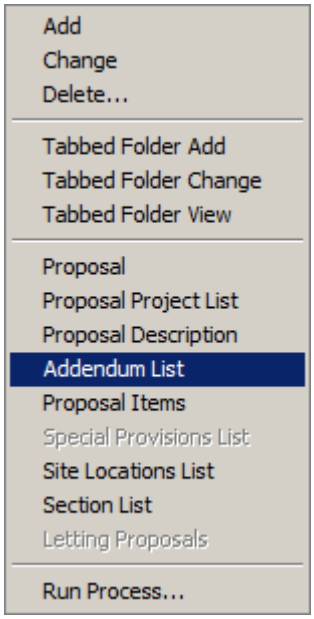
(*Proposals Window*)

2	Right-click on the **proposal** to which you wish to add an addendum.	A right-click menu will appear.

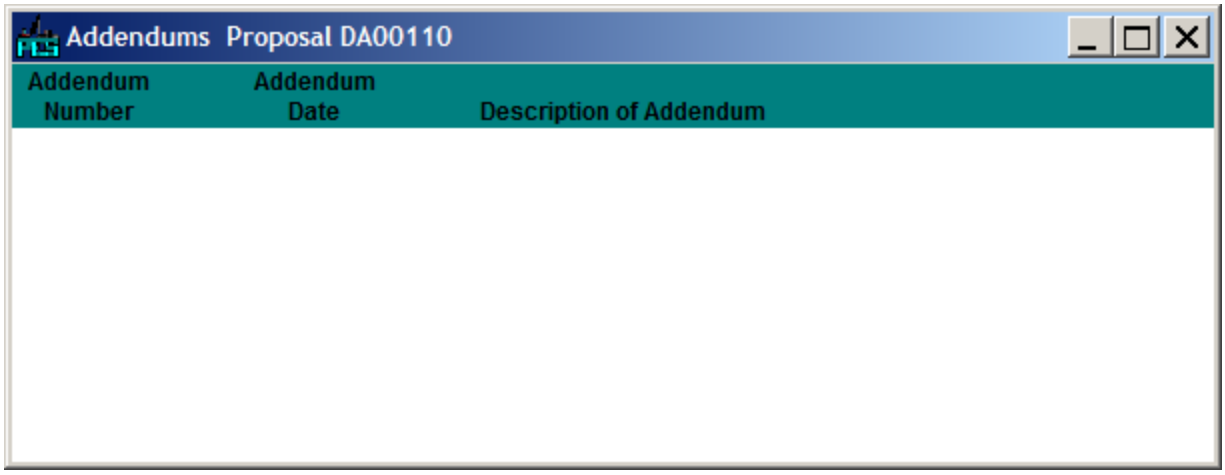
Continued on Following Page

Creating an Addendum for Item Removal

(continued)



3	Select **ADDENDUM LIST** from the menu.	The **Addendums** window will appear.



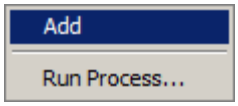
(*Addendums Window*)

4	Right-click in the blank area of the window.	A right-click menu will appear.

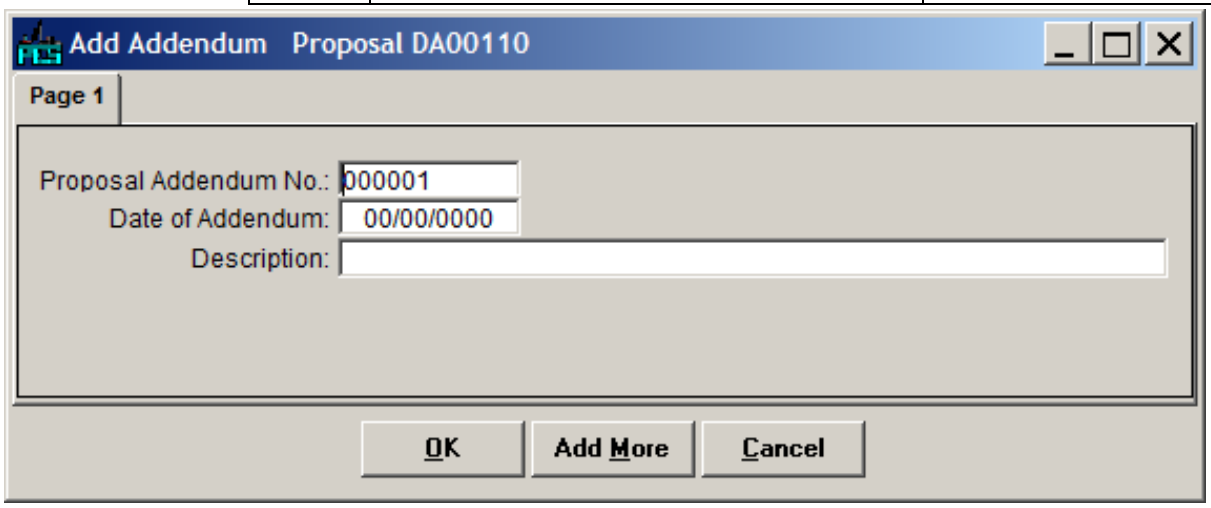
Continued on Following Page

Creating an Addendum for Item Removal

(continued)



5	Select **ADD** from the menu.	The **Add Addendum** window will appear.



(*Add Addendum Window*)

NOTE: The **PROPOSAL ADDENDUM NO.** field will contain the next available addendum number in sequence.

6	Type the **date** in the **DATE OF ADDENDUM** field.	N/A
7	Type a **description** of the addendum in the **DESCRIPTION** field.	N/A
8	Click the **OK** button.	This information will be saved.

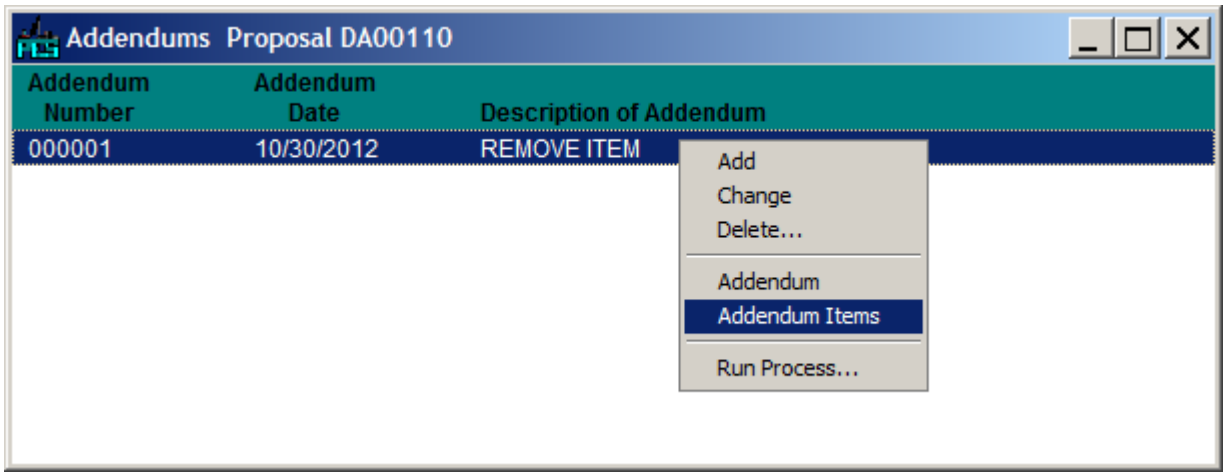
You will return to the **Addendums** window. The new addendum will appear in the list.

9	Right-click on the **Addendum** you just added.	A right-click menu will appear.

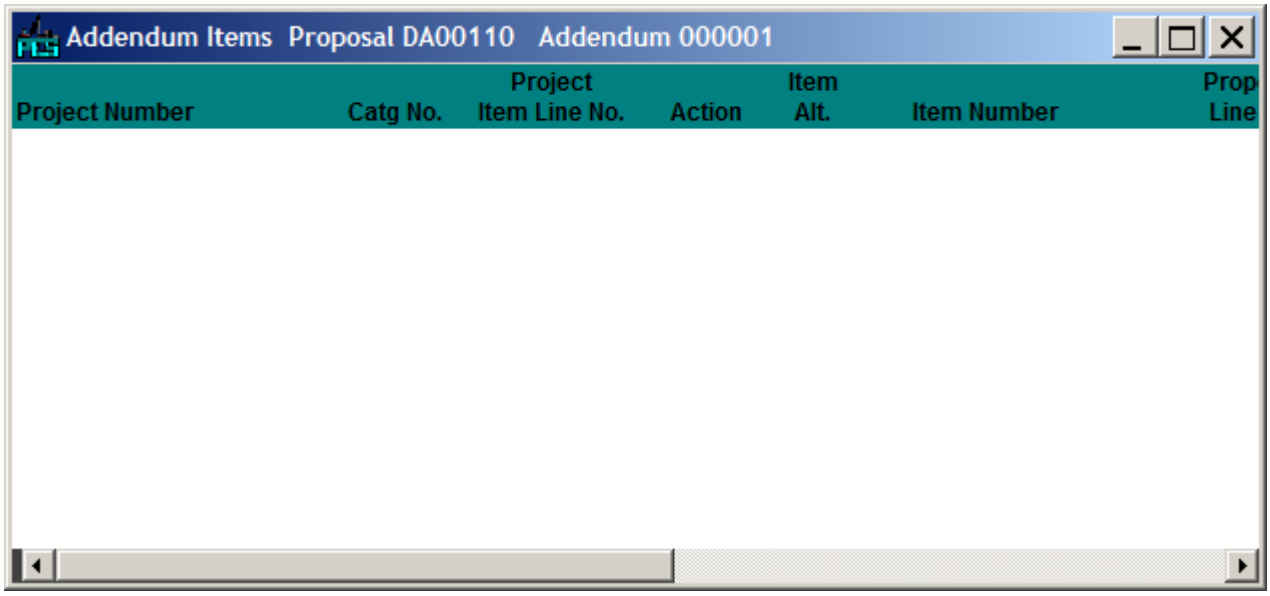
Continued on Following Page

Creating an Addendum for Item Removal

(continued)



10	Select **ADDENDUM ITEMS** from the menu.	The **Addendums** window will appear.



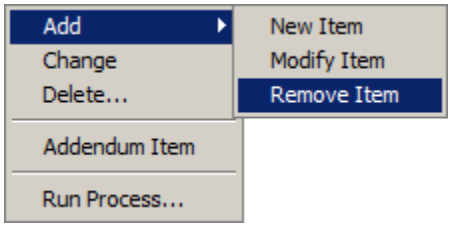
(*Addendum Items Window*)

11	Right-click in the blank area of the window.	A right-click menu will appear.

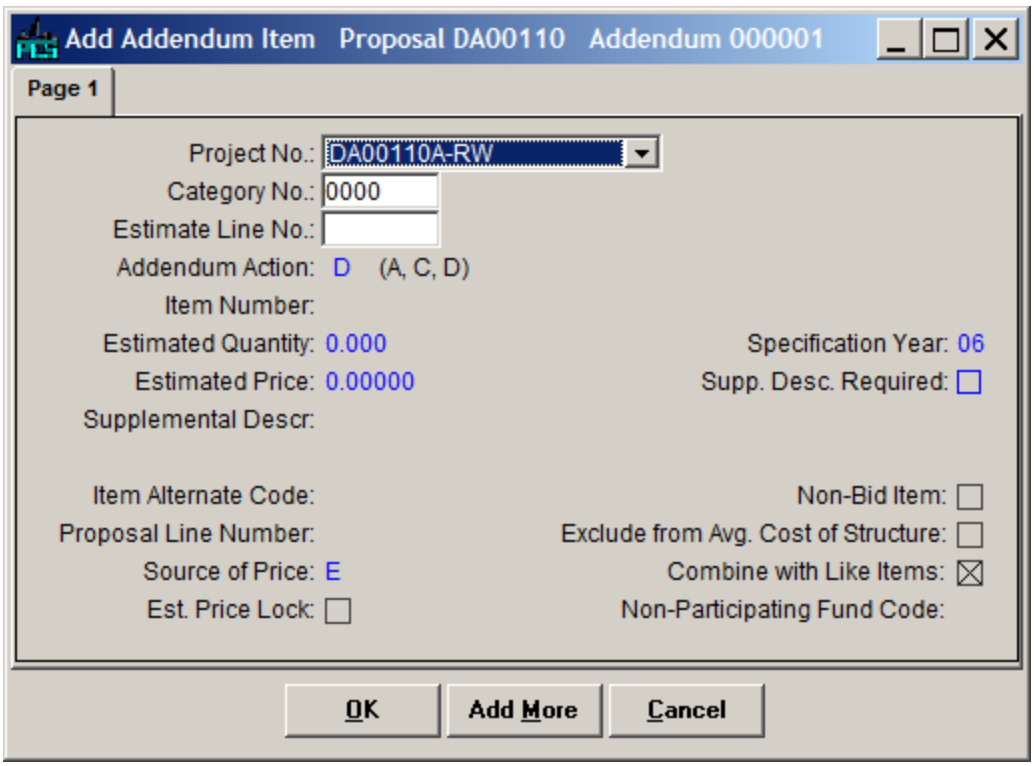
Continued on Following Page

Creating an Addendum for Item Removal

(continued)



12	Select **ADD**, then **REMOVE ITEM** from the menu.	The **Addendum Item** window will open.



(*Add Addendum Item Window - Remove*)

13	If applicable, select the correct **project number** from the drop-down list in the **PROJECT NO.** field.	

Continued on Following Page

Creating an Addendum for Item Removal

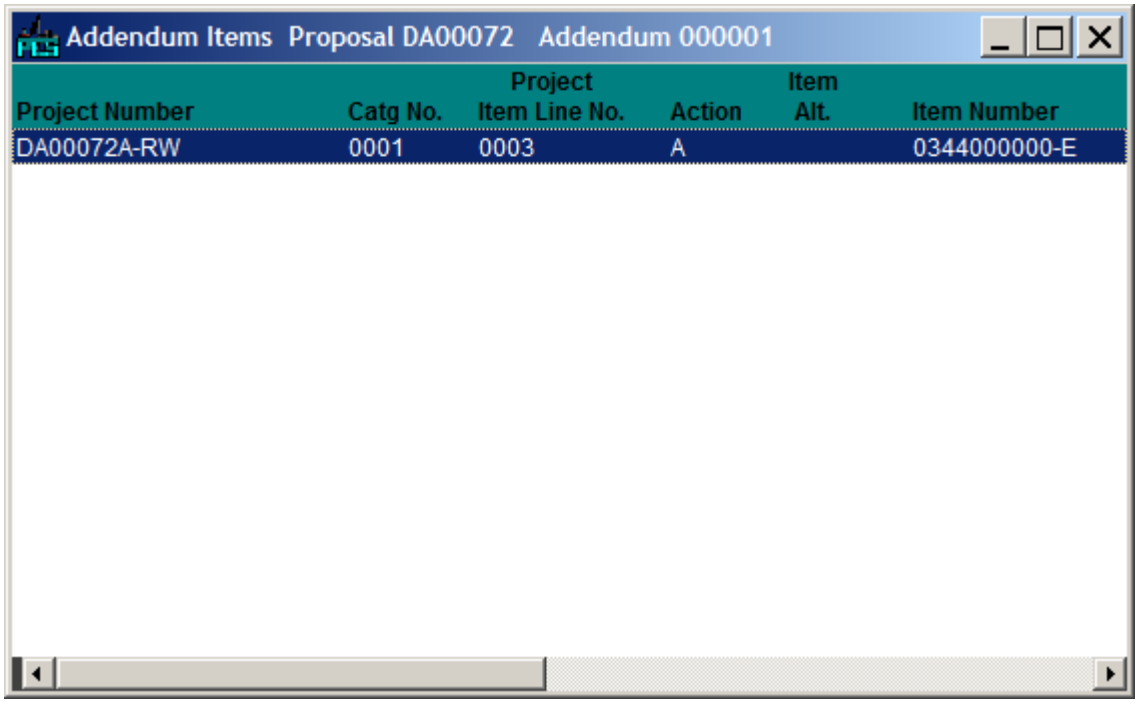
(continued)

14	Select the **correct category number** from the drop-down list in the **CATEGORY NO.** field.	N/A
15	Select the **correct estimate line number** from the drop-down list in the **ESTIMATE LINE NO.** field.	The item information will appear.
16	Click the OK button.	The new Addendum will be listed in the **Addendum Items** window.

After you **Add**, **Modify**, or **Remove** an item, you must re-initialize the letting proposal.

See **Initializing Letting Proposals** on page **6-25**.

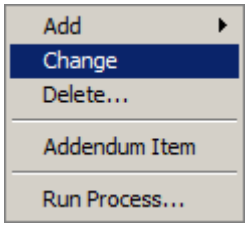
Changing an Addendum Item



(*Addendum Items Window*)

From the **Addendum Items** window:

Step	Action	Result
1	Right-click on the **Addendum Item**.	A right-click menu will appear.

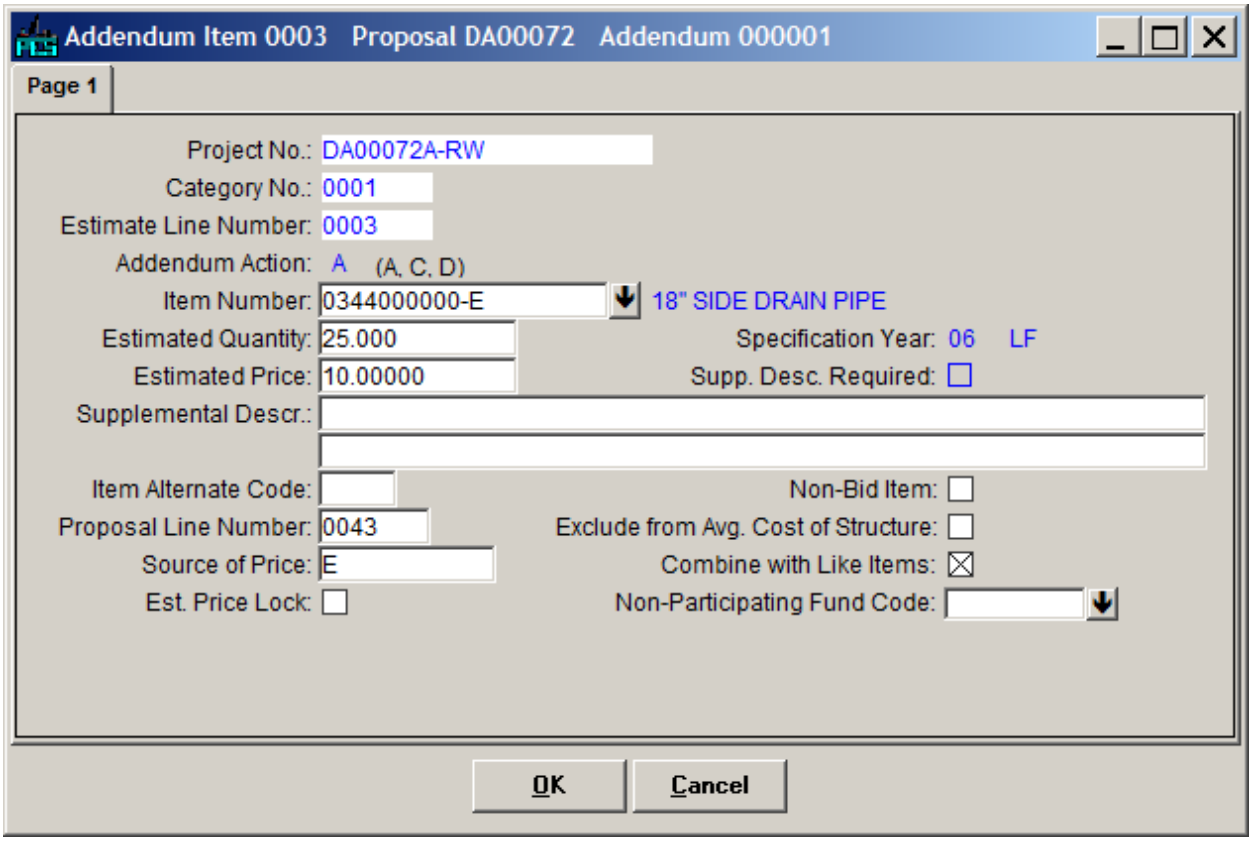


2	Select **CHANGE** from the menu.	The **Addendum Item** window will open.

Continued on Following Page

Changing an Addendum Item

(continued)



(*Addendum Item Window – Change Mode*)

3	Edit any information you wish to change.	N/A

🗁**NOTE:** If an item was originally added as a bid item but should be a non-bid item, that item must be deleted in one addendum and then added in a separate addendum as a non-bid item.

If an addendum item that has already been distributed needs to be changed, do another complete addendum. Doing so will override the previous addendum item for that proposal line number.

4	When you are finished making changes, click the **OK** button.	

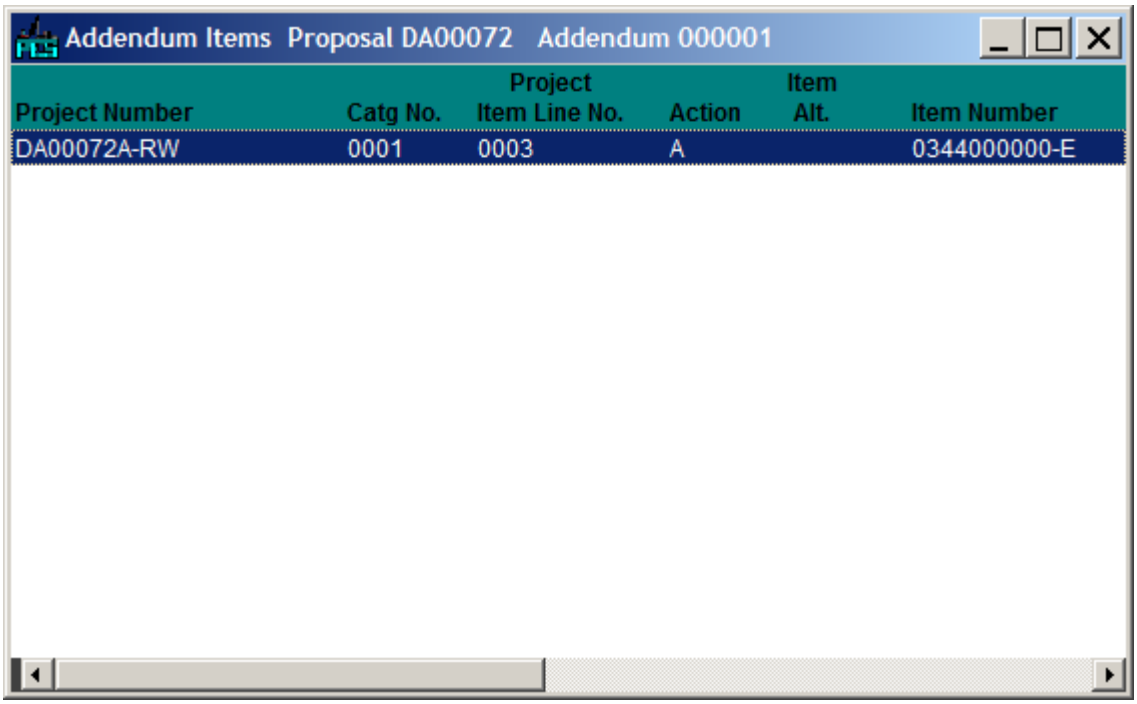
Continued on Following Page

Changing an Addendum Item

(continued)

5	After you **Add**, **Modify**, or **Remove** an item, you must re-initialize the letting proposal. See **Initializing Letting Proposals** on page **6-25**.

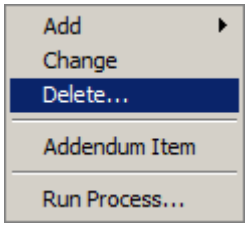
Deleting an Addendum Item



(*Addendum Items Window*)

From the **Addendum Items** window:

Step	Action	Result
1	Right-click on the **Addendum Item**.	A right-click menu will appear.

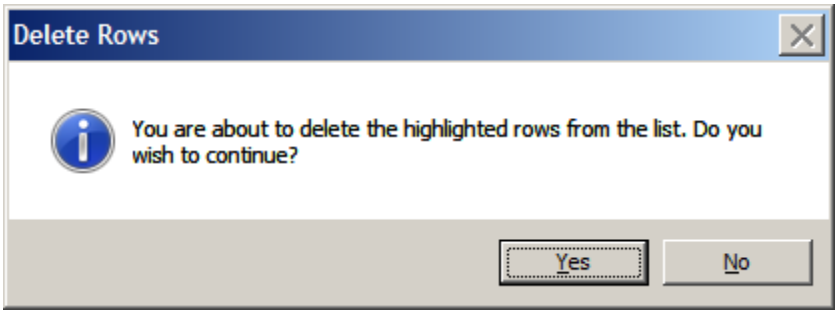


2	Select **DELETE** from the menu.	The following message will appear.

Continued on Following Page

Deleting an Addendum Item

(continued)

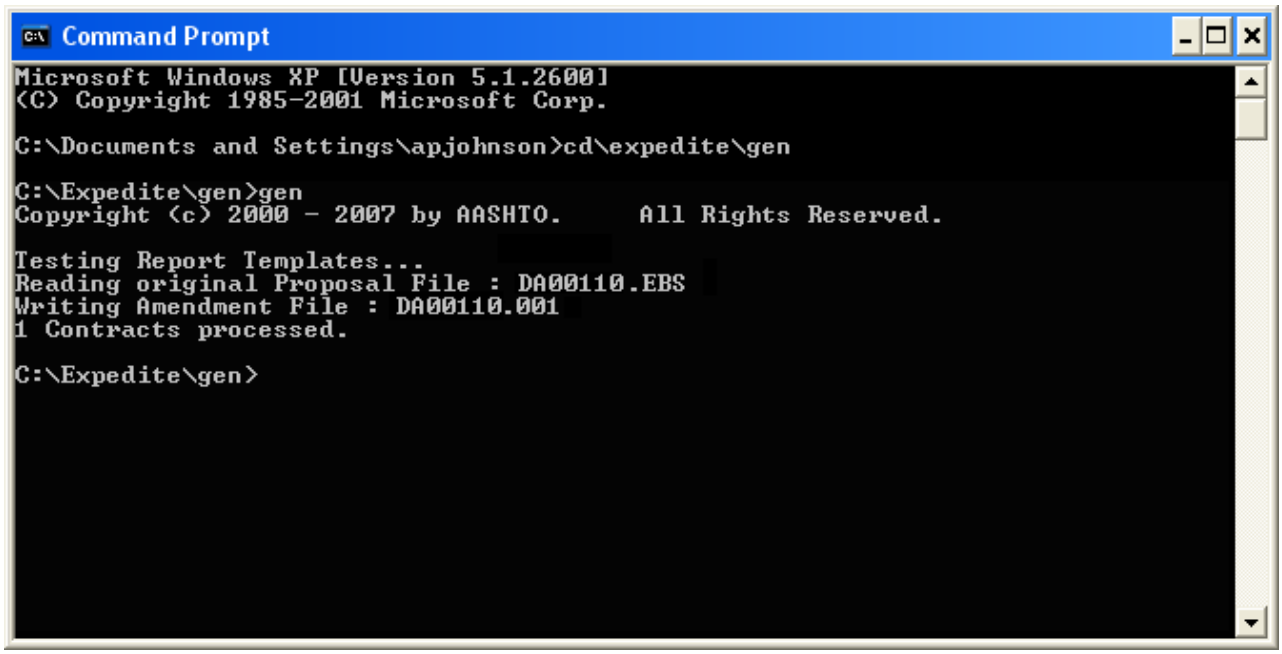


3	Click the **YES** button.	The Addendum will be deleted.

Completing the Addenda Process

After the addenda have been prepared, you are ready to distribute these changes to the contractors. This process will be the same as creating the EBS file. The only difference is that the files created will have the addendum number as their extension.

Step	Action	Result
1	Re-run the **PASS2EBS** file process. See **Creating the EBS File** on page **8-1**.	



🗁**NOTE:** The original .ebs file created at advertisement along with any previous addendum files must be in your current working directory **C:\Program Files\Expedite5.9a\Gen**.

The process will generate an addendum file as described above.

2	Give this Addendum file to the contractors. 🗁**NOTE:** Do **NOT** give them the complete **.EBS** file again.

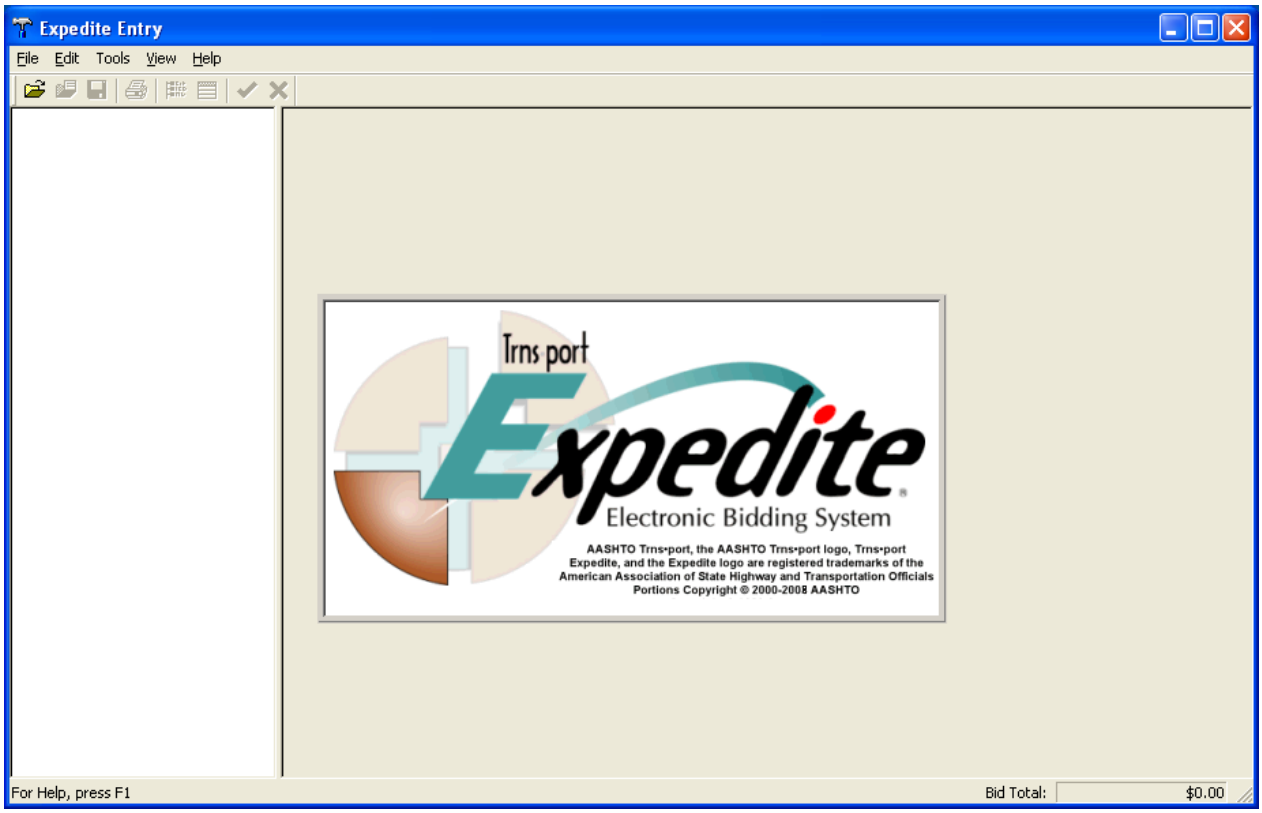
Completing the Addenda Process

(continued)

3	To apply the new file, the contractors must be instructed to load their copy of the original **.EBS** file into the **Expedite Bid** application.	N/A

Applying an Addendum in Expedite

Step	Action	Result
1	Launch the **Expedite Entry** Application.	The **Expedite Entry** window will appear.



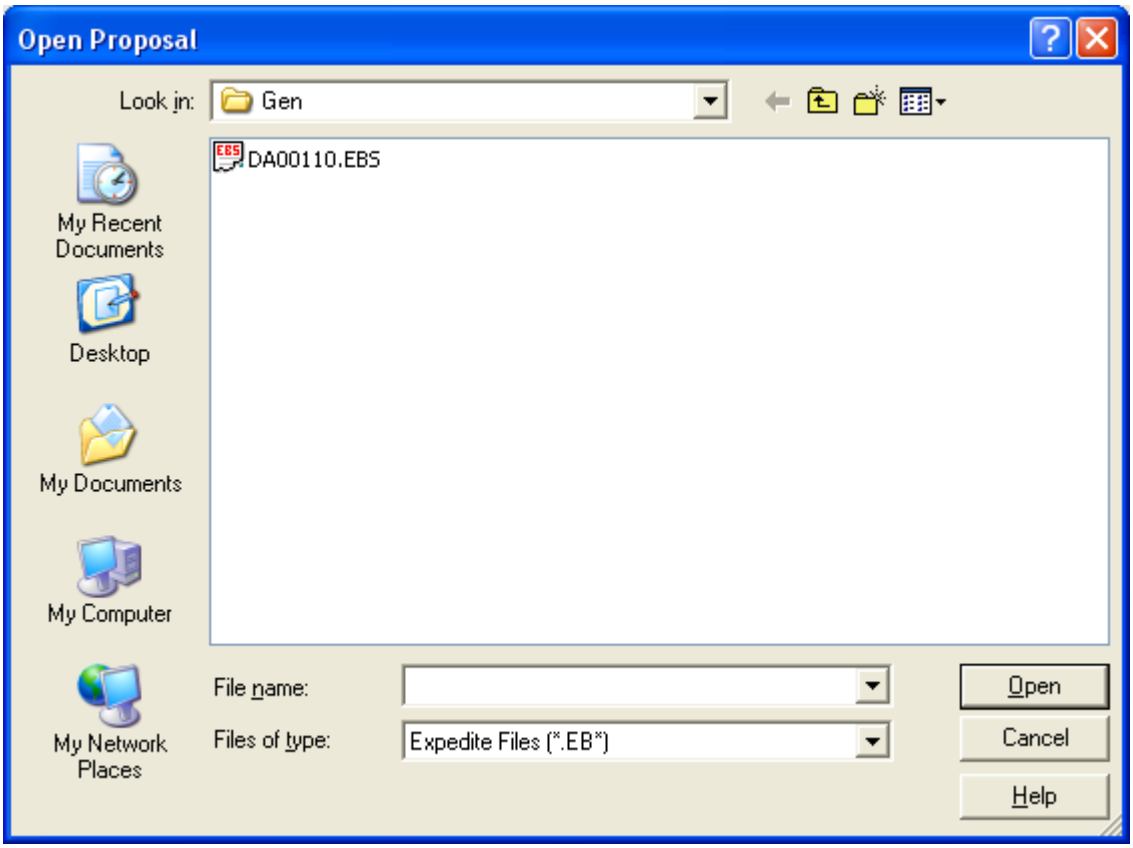
(*Expedite Entry Window*)

2	From the **FILE** menu, select **OPEN**.	The **Open Proposal** dialog will appear.

Continued on Following Page

Applying an Addendum in Expedite

(continued)



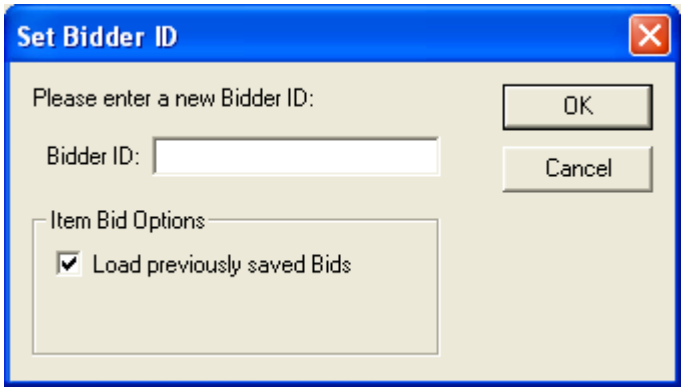
(*Open Proposal Dialog*)

3	Navigate to the directory containing your **.EBS** files.	N/A
4	Click on the **proposal** you would like to open.	N/A
5	Click the **OPEN** button.	The following dialog will appear.

Continued on Following Page

Applying an Addendum in Expedite

(continued)



6	Type the **bidder ID number of the contractor** in the **BIDDER ID** field.	N/A

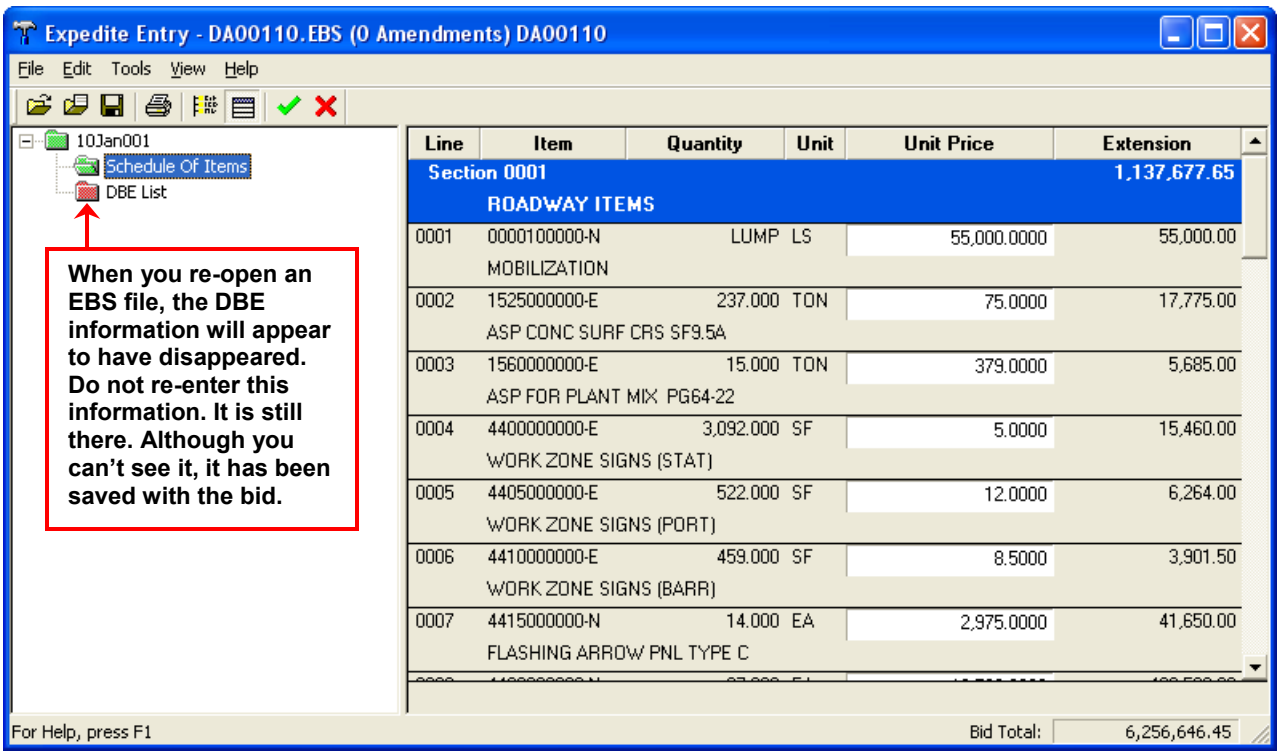
NOTE: The **Bidder ID** can be obtained through the **Vendor List** (**Vendors** button in **Trns•port LAS**) or **Planholder List** (**Planholders** button in **Trns•port LAS**).

7	Click the **OK** button.	The proposal will open in the **Expedite Entry** application.

Continued on Following Page

Applying an Addendum in Expedite

(continued)



(*Expedite Entry Window - Proposal*)

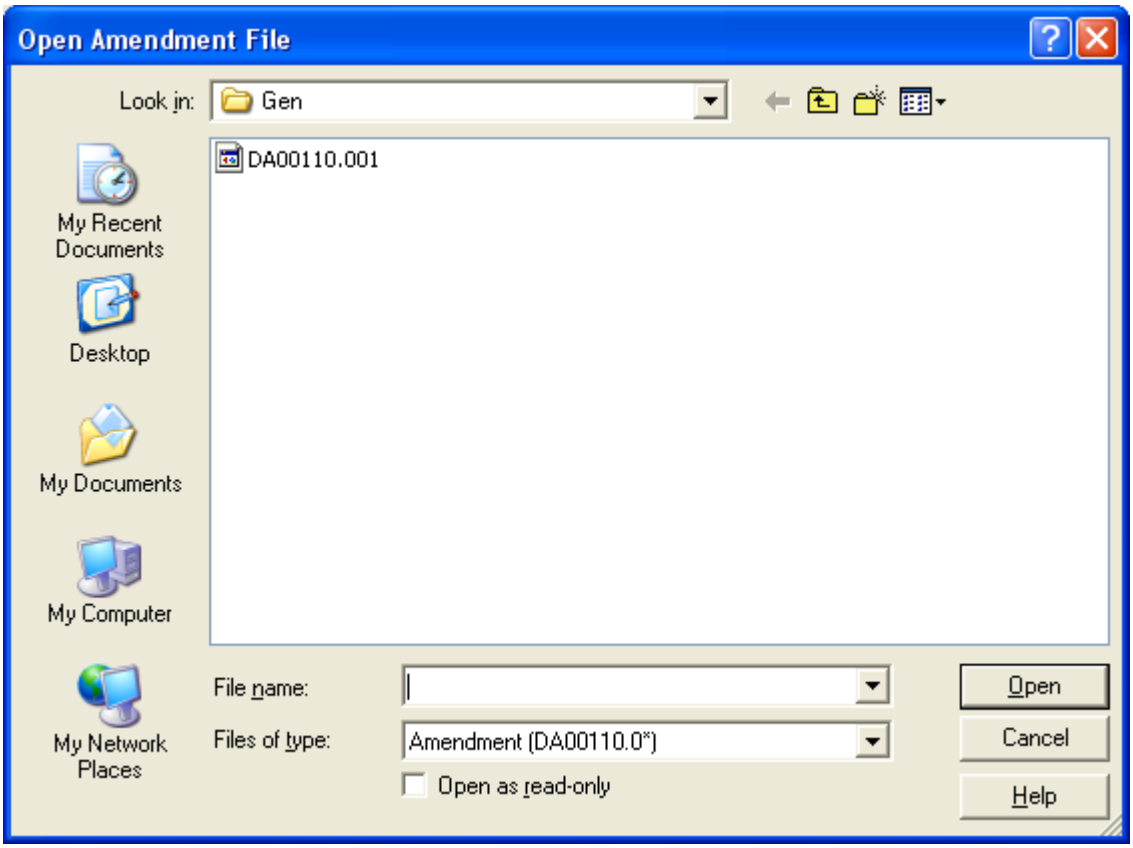
8	From the **FILE** menu, select **LOAD AMENDMENT…**	The **Open Amendment** dialog will appear.

NOTE: If the addendum file is in the same folder as the .EBS file, it will be applied automatically when the .EBS file is opened.

Continued on Following Page

Applying an Addendum in Expedite

(continued)



(*Open Amendment File Dialog*)

9	Select the Addendum file from the list.	N/A
10	Click the **OPEN** button.	The Addendum will be applied.

The contractors need to make changes to their bids accordingly.

Continued on Following Page

Applying an Addendum in Expedite

(continued)

The addenda items may be made available to the contractors via the Internet or via the portable media of their choice. **Regardless** of the method chosen to distribute addenda, **new hardcopy proposal sheets will be printed and sent to each contractor.**

🗁**NOTE:** Whenever you create an addendum file, open it in Expedite Bid to make sure it will work properly when the contractor receives it.

🗁**NOTE:** Don't move files from the **Gen** directory until a letting is complete. Make copies if you need them to be portable, but the original should remain until the letting is over. Once the letting is complete, copies should be archived.

Chapter 11 Letting Day Activities

On letting day, a lot of activities come together simultaneously. Many tasks are required, and they are all included here for informational purposes. The purpose of this chapter is to make sure all steps have been taken to ensure a successful letting.

Processing Hand-Entered Bids with Expedite

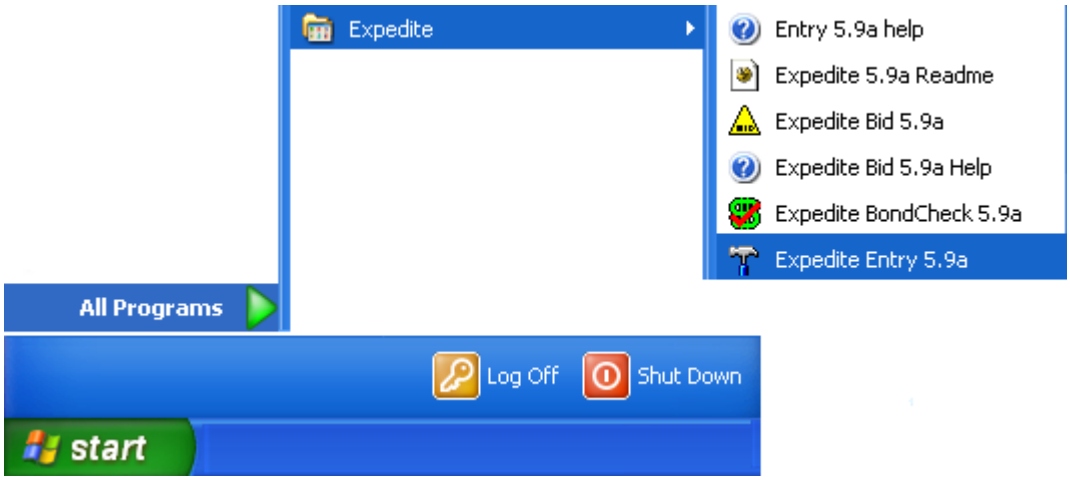
Some contractors prefer to submit their bids in paper form only. These paper bids must be converted into an electronic format that can be combined with the other electronic bids submitted to NCDOT for comparison. The application used for this is called **Expedite Entry**.

Before any bids can be entered through Expedite Entry, you ***must*** place all **.EBS** bid files for the letting on the network so that the person entering this information can access them.

Paper bids entered via the Expedite Entry application will create a bid file named **XtabDat.DAT** in the **C:\Program Files\Expedite5.9a\Load** directory of each bid entry operator's PC. This program allows the entry of bid data from several bidders by differentiating them by using different bidder IDs.

IMPORTANT!

Make sure to delete the **XtabDat.dat** and **xdbedat.dat** files from the previous letting **BEFORE** entering bids for a new letting.

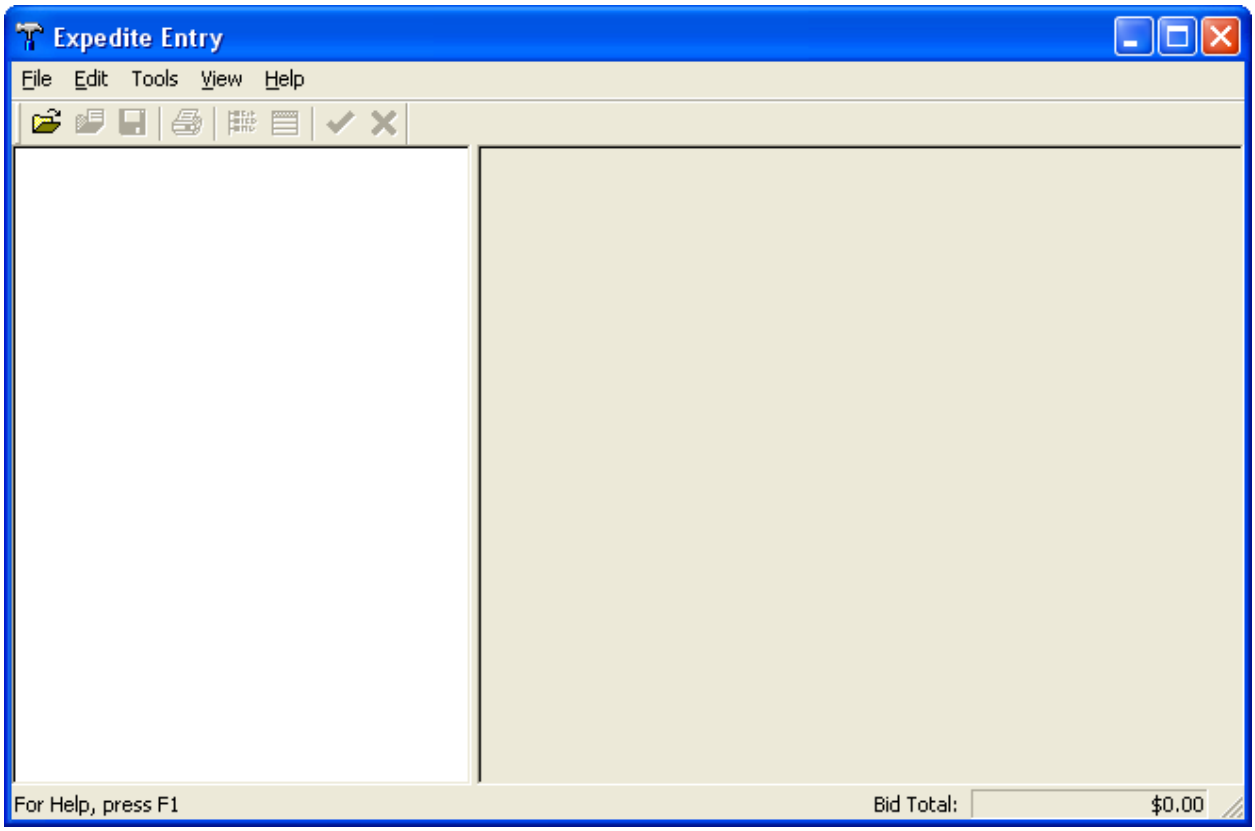


Step	Action	Result
1	From the START menu, select ALL PROGRAMS, then EXPEDITE, and click on EXPEDITE ENTRY. If you have an **Expedite Entry** icon on your desktop, you will be able to click it to access the application.	The **Expedite Entry** application will appear.

Continued on Following Page

Processing Hand-Entered Bids with Expedite

(continued)



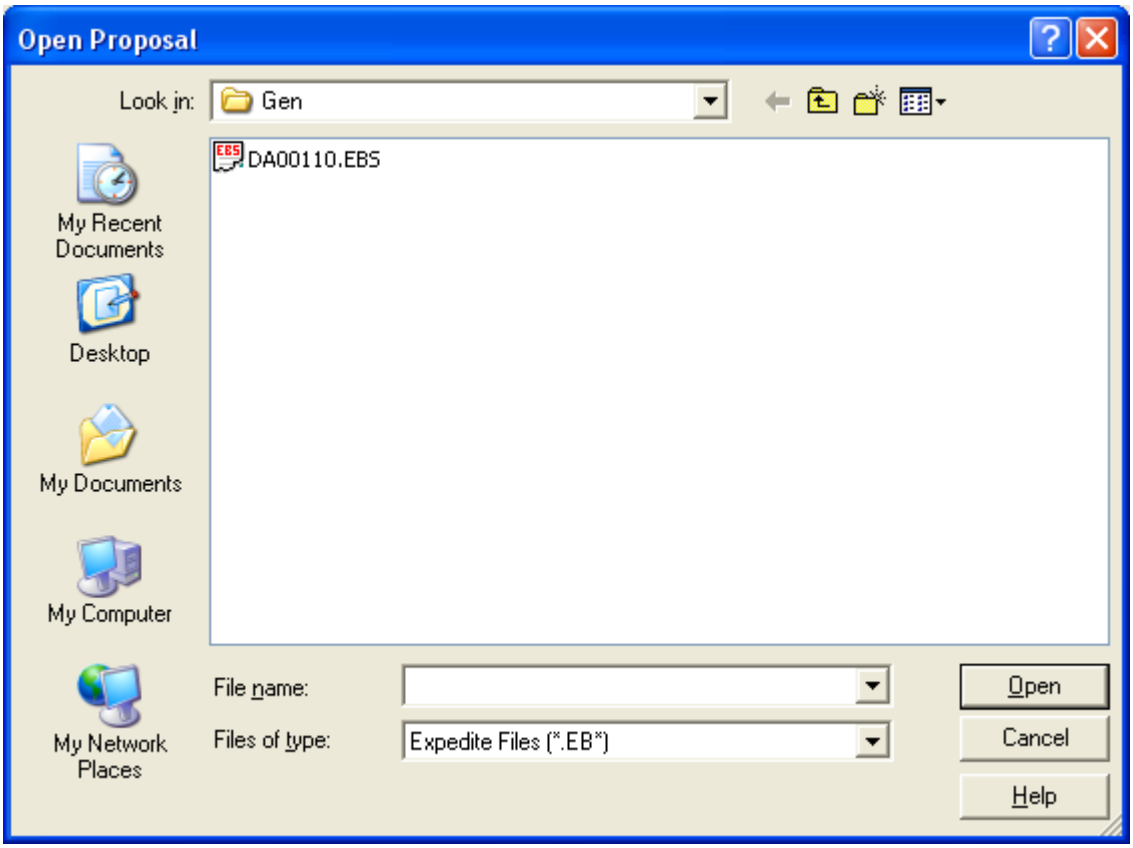
(*Expedite Entry Main Window*)

2	Select **OPEN** from the **FILE** drop-down menu.	The **Open Proposal** dialog will appear.

Continued on Following Page

Processing Hand-Entered Bids with Expedite

(continued)



(*Open Proposal Dialog*)

`

3	Navigate to the correct **.EBS** file for the letting. Click on this file to select it.	N/A
4	Click the **OPEN** button.	The **Set Bidder ID** dialog will appear.

NOTE: The **Bidder ID** can be obtained through the **Vendor List** (**Vendors** button in **Trns•port LAS**) or **Planholder List** (**Planholders** button in **Trns•port LAS**).

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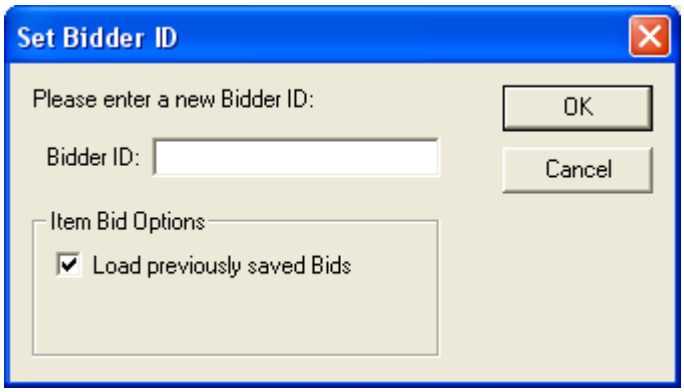
Processing Hand-Entered Bids with Expedite

(continued)



(*Set Bidder ID Dialog*)

5	Type the **bidder ID number of the contractor** in the **BIDDER ID** field.	N/A
6	Click the **OK** button.	The window will populate with the items from the letting.

🗁**NOTE:** Check the Title Bar to make sure the title bar it indicates that all of the amendments (addendum) to the contract are included.

The First time you use Expedite

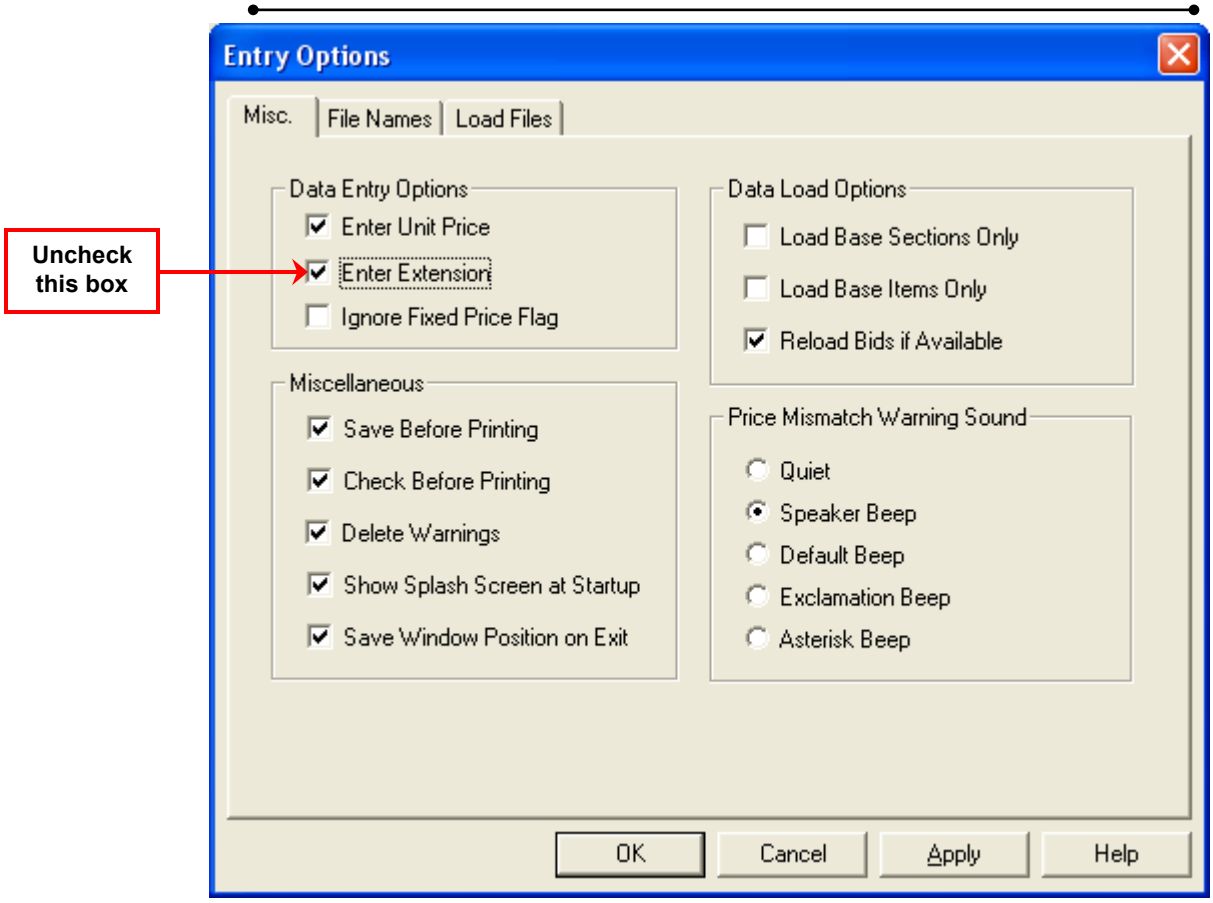
The Expedite application will default to make you enter extensions for each of your line items.

The first time you use Expedite, go to the **TOOLS** drop-down menu and select **OPTIONS**.

Continued on Following Page

Processing Hand-Entered Bids with Expedite

(continued)



(*Set Bidder ID Dialog*)

Remove the check mark in the **ENTER EXTENSION** check box.

Once you select this, you will not have to change it again.

7	Type the unit price for each line item from the paper copy of the bid in the **UNIT PRICE** field.	N/A
8	After all individual unit prices have been entered, make sure the online bid total matches the total of the paper bid.	

Continued on Following Page

Processing Hand-Entered Bids with Expedite

(continued)

🗁**NOTE:** If you find an error in the contractor's bid, consult ***Section 103: Award and Execution of Contract*** in the **Standard Specification for Roads and Structures** (Spec Book).

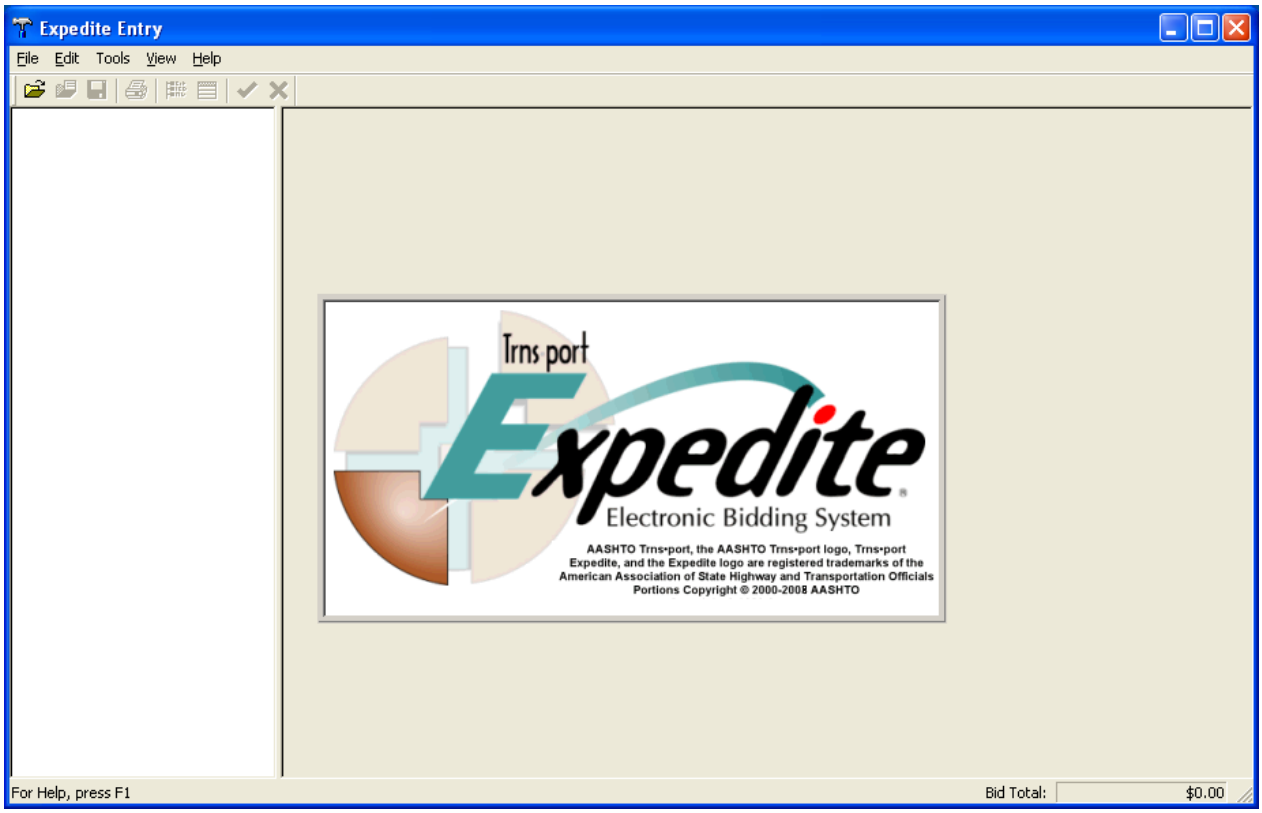
10	Click the SAVE button. 🗁**NOTE:** You can save at any time. You don't need to wait until the end. This will ensure that you don't lose any work to system outages, etc.	The bid has been saved electronically.

The **Xtabdat.dat** file has been created. This file is located in the **C:\Program Files\Expedite5.9a\Load** directory.

11	If you have more than one bid to enter, repeat steps 2-10. If this is the only bid you need to enter, close the **Expedite Entry** application.

Adding DBE/MBE/WBE Entries In Expedite Entry

Step	Action	Result
1	Launch the **Expedite Entry** Application.	The **Expedite Entry** window will appear.



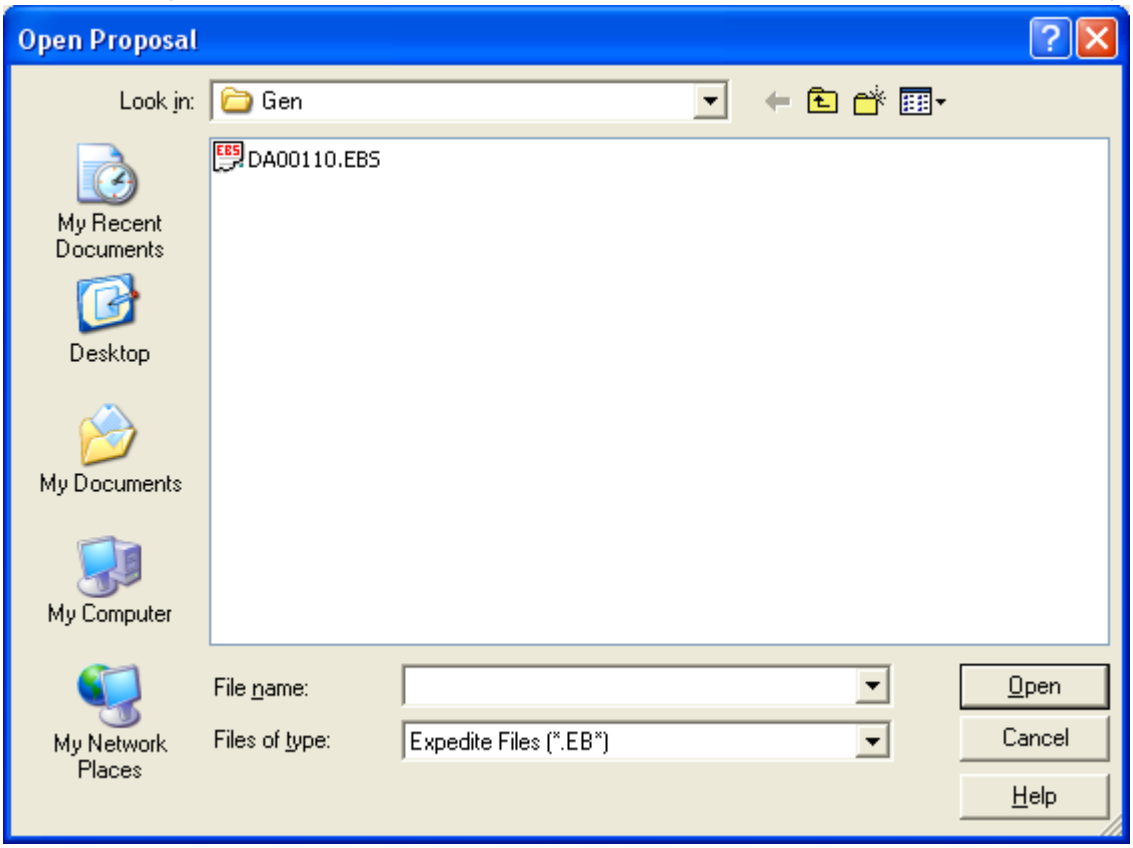
(*Expedite Entry Window*)

2	From the **FILE** menu, select **OPEN**.	The **Open Proposal** dialog will appear.

Continued on Following Page

Adding DBE/MBE/WBE Entries In Expedite Entry

(continued)



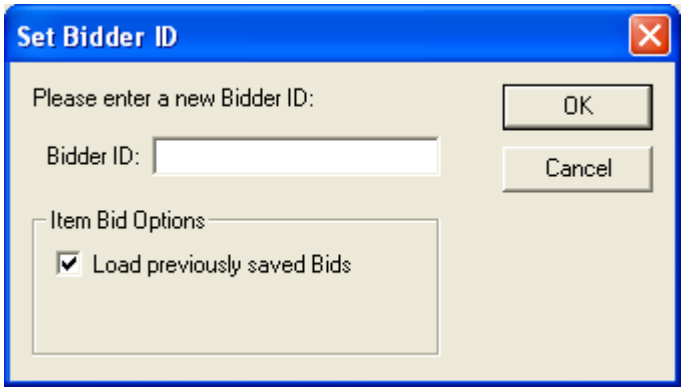
(*Open Proposal Dialog*)

3	Navigate to the directory containing your **.EBS** files.	N/A
4	Click on the **proposal** you would like to open.	N/A
5	Click the **OPEN** button.	The following dialog will appear.

Continued on Following Page

Adding DBE/MBE/WBE Entries In Expedite Entry

(continued)



6	Type the **bidder ID number of the contractor** in the **BIDDER ID** field.	N/A

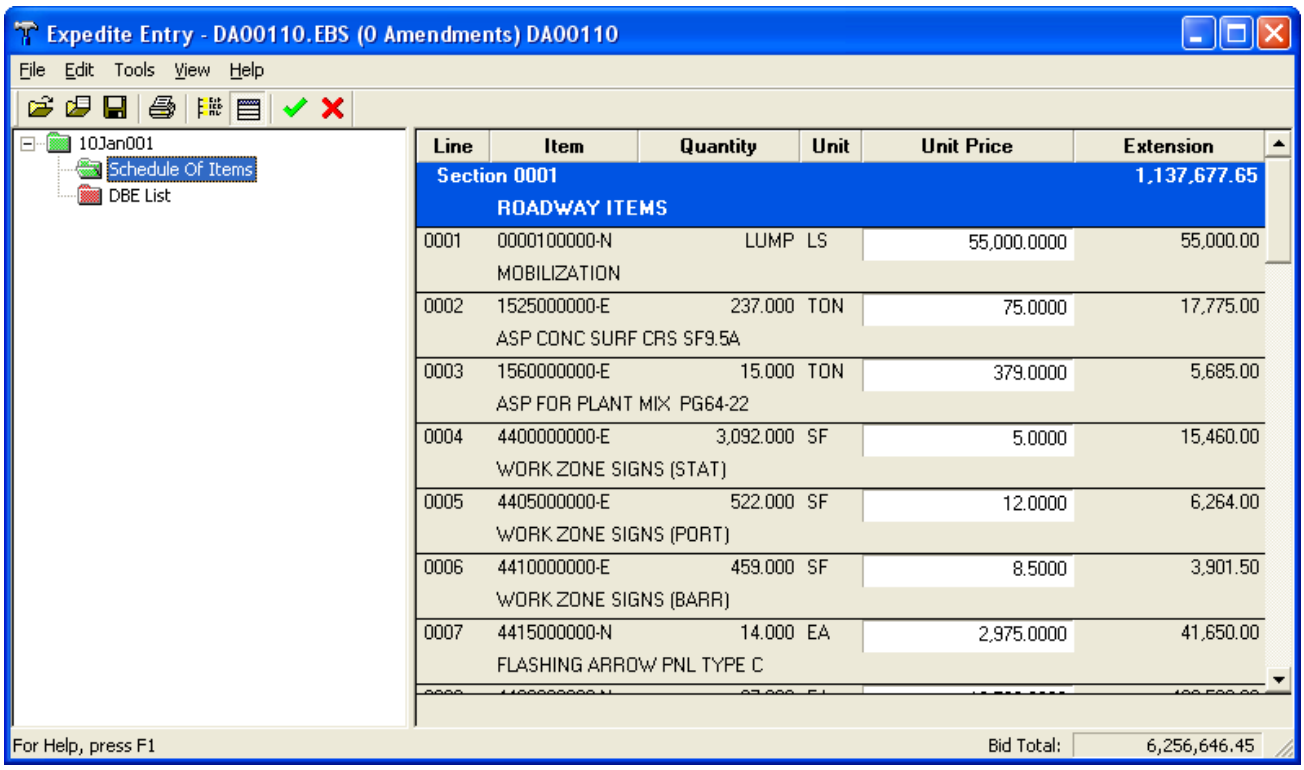
🗁**NOTE:** The **Bidder ID** can be obtained through the **Vendor List** (**Vendors** button in **Trns•port LAS**) or **Planholder List** (**Planholders** button in **Trns•port LAS**).

7	Click the **OK** button.	The proposal will open in the **Expedite Entry** application.

Continued on Following Page

Adding DBE/MBE/WBE Entries In Expedite Entry

(continued)



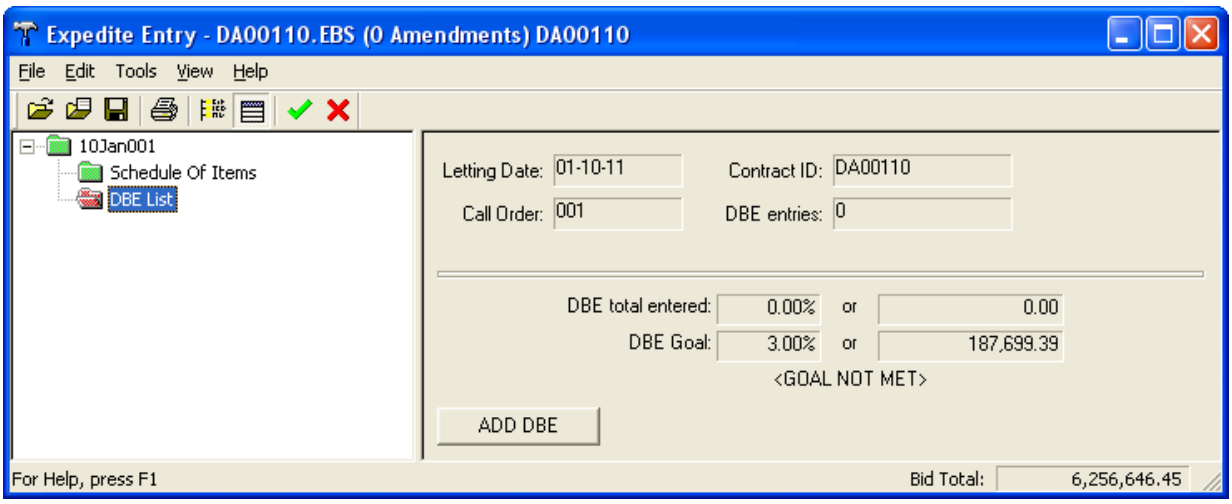
(*Expedite Entry Window - Proposal*)

8	Click on the applicable folder: **DBE LIST** **MBE LIST** **WBE LIST**.	The applicable panel will appear.

Continued on Following Page

Adding DBE/MBE/WBE Entries In Expedite Entry

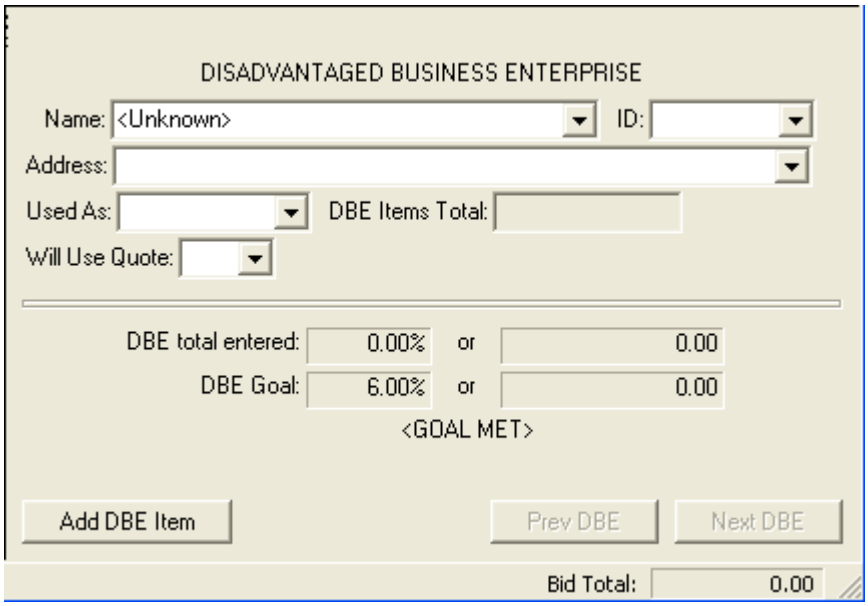
(continued)



(*DBE List Panel*)

9	Click the **ADD DBE** button.	The applicable panel will appear.

If you clicked the **DBE List** folder, the **DBE Entry** panel will appear.



(*DBE Entry Panel*)

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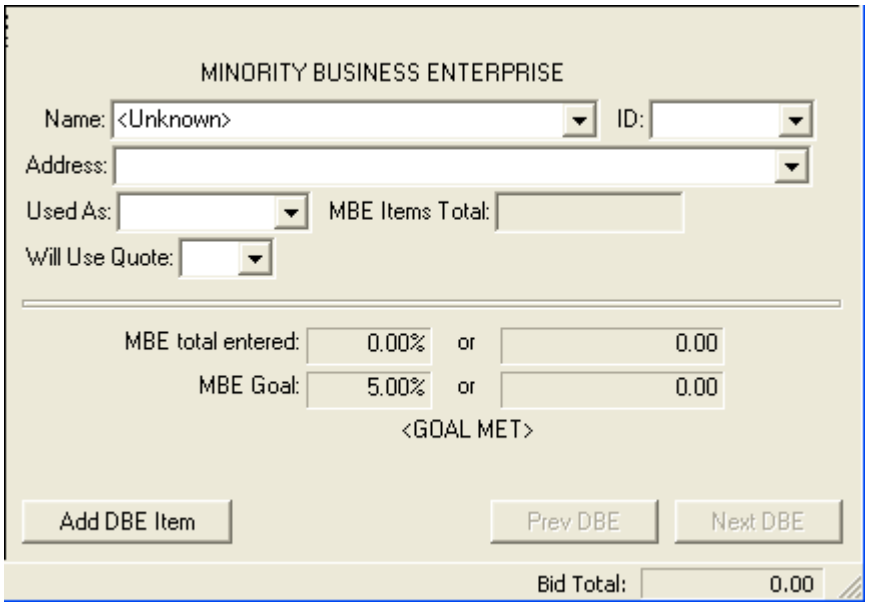
Adding DBE/MBE/WBE Entries In Expedite Entry

(continued)

If you clicked the **MBE List** folder, the **MBE Entry** panel will appear.



(*MBE Entry Panel*)

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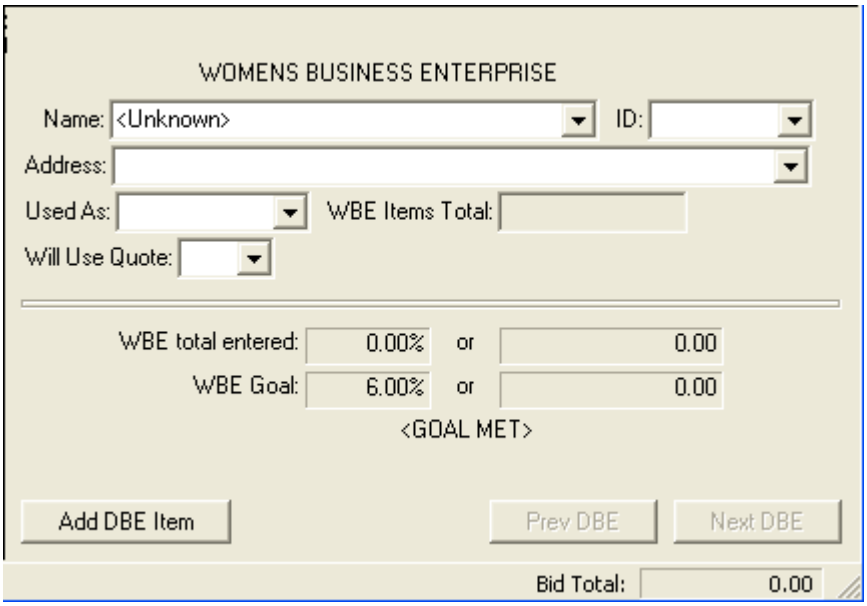
Adding DBE/MBE/WBE Entries In Expedite Entry

(continued)

If you clicked the **WBE List** folder, the **WBE Entry** panel will appear.



(*WBE Entry Panel*)

10	Select the **vendor name** from the drop-down list in the **NAME** field.	The **ID** and **ADDRESS** fields will be filled automatically.

🗁**NOTE:** If you haven't saved the **DBE_NC.BIN** file in the **C:\Program Files\Expedite5.9a** directory, the vendor list will not contain any information.
The procedure for **Creating the DBE_NC.BIN File** is on page **8-15**. This is the file you should use.

11	Select **Manufacturer**, **Subcontractor**, or **Supplier** from the drop-down list in the **USED AS** field.	N/A
12	Select **Yes** or **No** from the drop-down list in the **WILL USE QUOTE** field.	N/A

To add additional vendors, right-click the applicable folder and select from the menu.

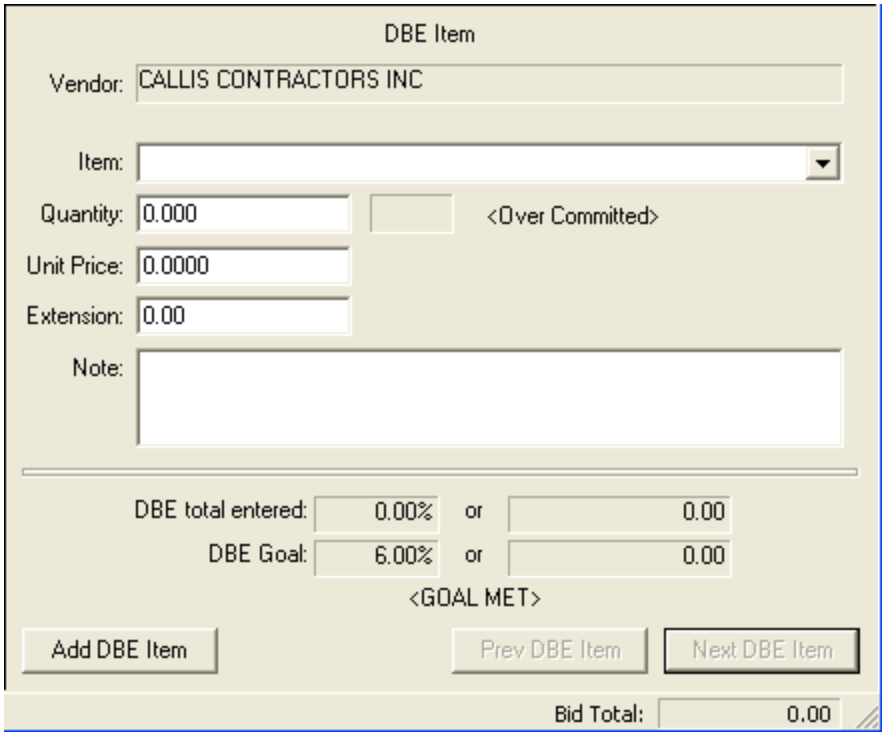
Continued on Following Page

Adding DBE/MBE/WBE Entries In Expedite Entry

(continued)

To add **DBE**, **MBE**, or **WBE** items:

13	Click the **ADD DBE ITEM** button.	The applicable item entry panel will appear.



(*DBE Item Entry Panel*)

14	Select the **item** from the drop-down list in the **ITEM** field.	The **QUANTITY** and **UNIT** fields will be filled automatically.
15	Type the **price** in the **UNIT PRICE** field.	The **EXTENSION** field will be filled automatically.
16	If applicable, type a **note** in the **NOTE** field.	N/A

Continued on Following Page

Adding DBE/MBE/WBE Entries In Expedite Entry

(continued)

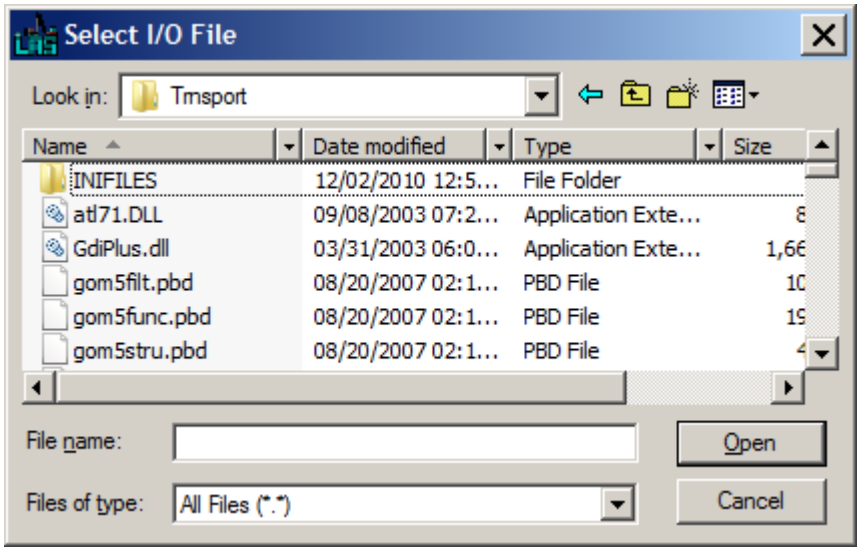
17	Click the SAVE button.	The new **DBE**, **MBE** or **WBE** records and **Items** will be saved.

Loading Hand-Entered Bids into LAS

Uploading the Xtabdat.dat File

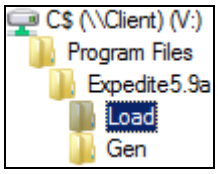
Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Select **UPLOAD FILE**, then **PROCESS I/O FILE** from the **UTILITIES** drop-down menu.	The **Select I/O File** dialog will appear.



(*Select I/O File Dialog*)

2	Select **C$ (\\CLIENT) (V:)** from the drop-down list in the **LOOK IN** field.	N/A
3	Navigate to the **\Program Files\Expedite5.9a\Load** directory.	N/A

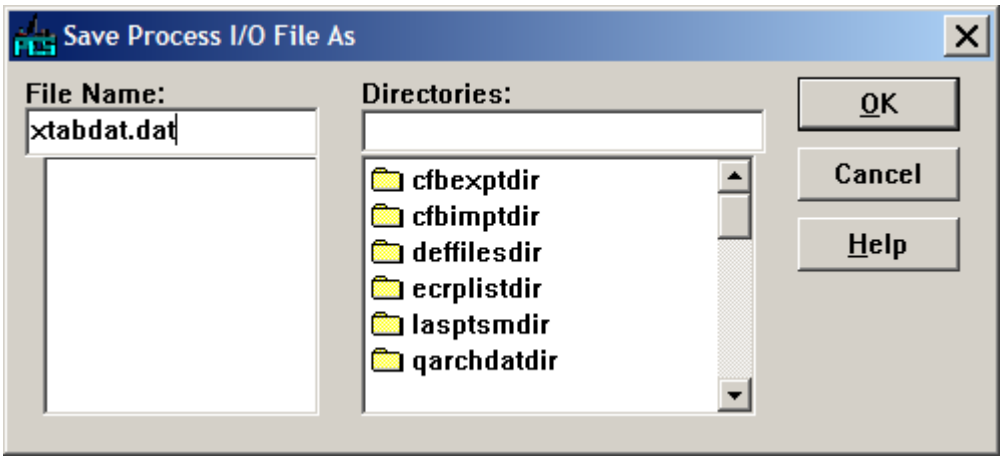


4	Click on the **XtabDat.DAT** file to select it.	N/A
5	Click the **OPEN** button.	The **Save Process I/O File As** dialog will appear.

Continued on Following Page

Loading Hand-Entered Bids into LAS

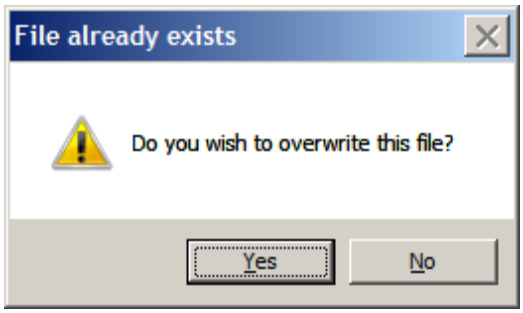
(continued)



(*Save Process I/O File As Dialog*)

6	Double-click on the **qbidtabdir** directory to open it.	N/A
7	Click the **OK** button.	The file has been saved to the **qbidtabdir** directory.

NOTE: If you have another **xtabdat.dat** file in this location, you will receive a warning that it will be overwritten. Click the **YES** button to overwrite the file.



Uploading the Xdbedat.dat File

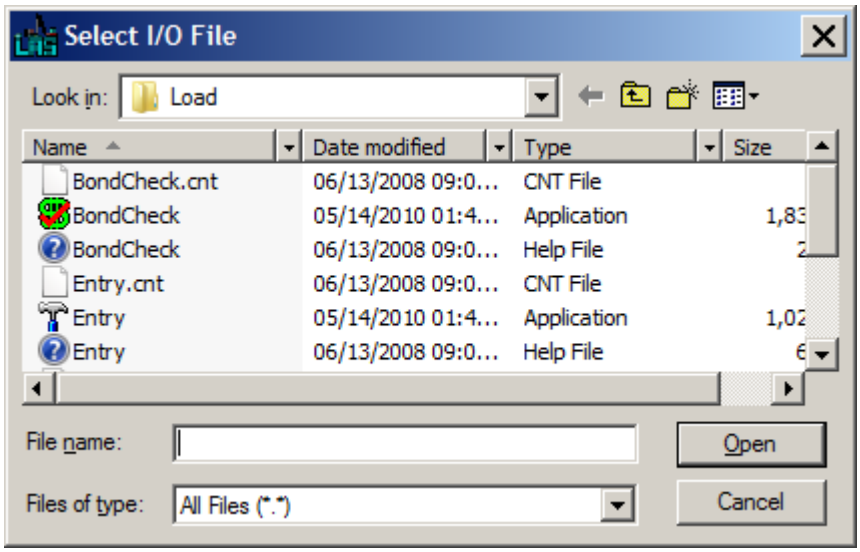
Now you will need to repeat this process for the **XDBEDat.DAT** file.

8	Select **UPLOAD FILE**, then **PROCESS I/O FILE** from the **UTILITIES** drop-down menu.	The **Select I/O File** dialog will appear.

Continued on Following Page

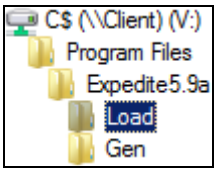
Loading Hand-Entered Bids into LAS

(continued)



(*Select I/O File Dialog*)

9	Select **C$ (\\CLIENT) (V:)** from the drop-down list in the **LOOK IN** field.	N/A
10	Navigate to the **\Program Files\Expedite5.9a\Load** directory.	N/A

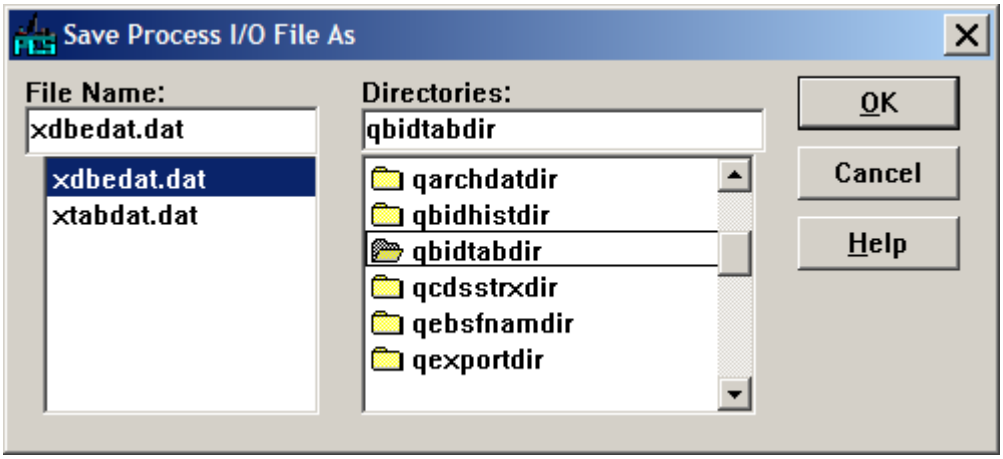


11	Click on the **XDBEDat.DAT** file to select it.	N/A
12	Click the **OPEN** button.	The **Save Process I/O File As** dialog will appear.

Continued on Following Page

Loading Hand-Entered Bids into LAS

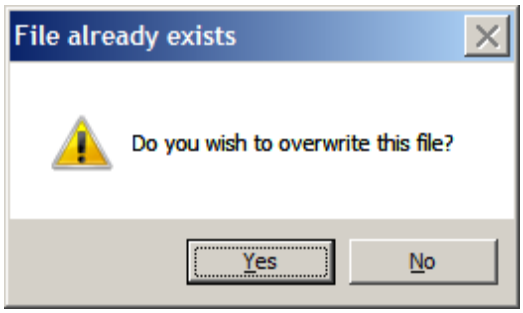
(continued)



(*Save Process I/O File As Dialog*)

13	Double-click on the **qbidtabdir** directory to open it.	N/A
14	Click the **OK** button.	The file has been saved to the **qbidtabdir** directory.

NOTE: If you have another **xdbedat.dat** file in this location, you will receive a warning that it will be overwritten. Click the **YES** button to overwrite the file.



Continued on Following Page

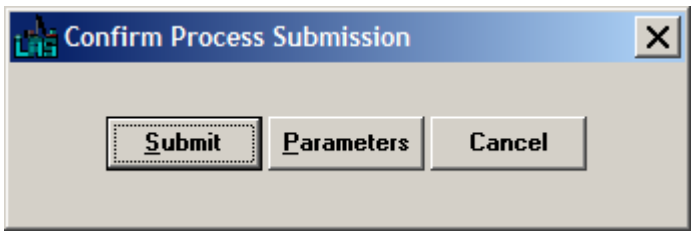
Loading Hand-Entered Bids into LAS

(continued)

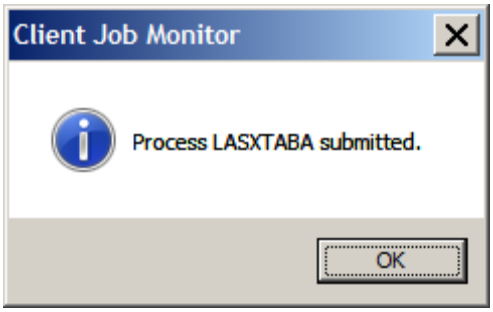
Running the Load Bid Tabs Process

Now you will need to run the process that will load the bid tab data you just uploaded into the appropriate letting.

15	Select **IMPORT**, then **LOAD BID TABS** from the **FILE** drop-down menu.	The **Confirm Process Submission** dialog will appear.

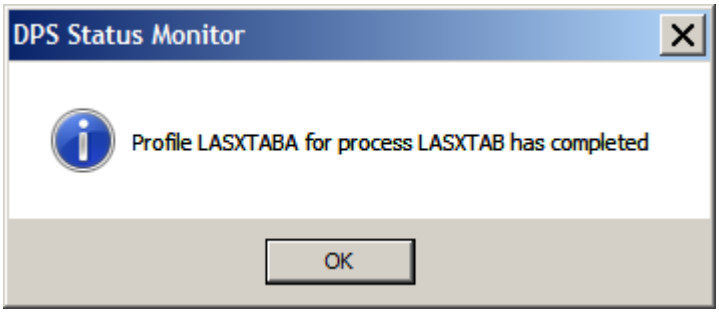


16	Click the **SUBMIT** button.	The following message will appear.



17	Click the **OK** button.	The following message will appear.

NOTE: This could take several minutes before the process completes.



Continued on Following Page

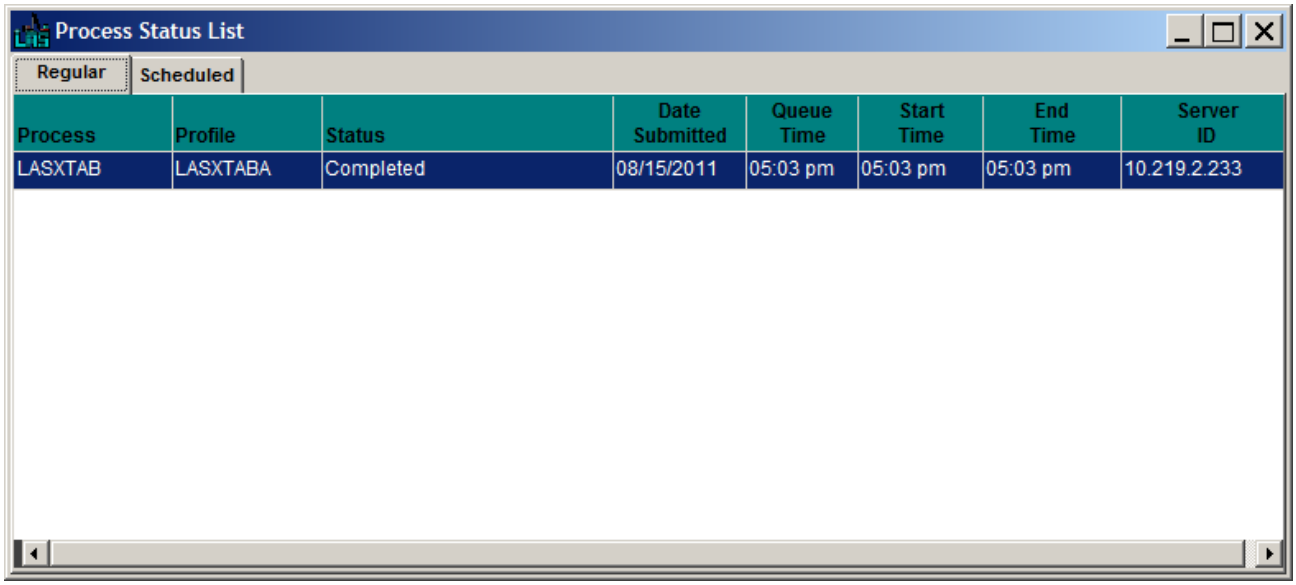
Loading Hand-Entered Bids into LAS

(continued)

18	Click the **OK** button.	N/A

Once the process has completed, you must determine if it was successful.

19	Select **PROCESS STATUS** from the **FILE** drop-down menu.	The **Process Status List** window will appear.



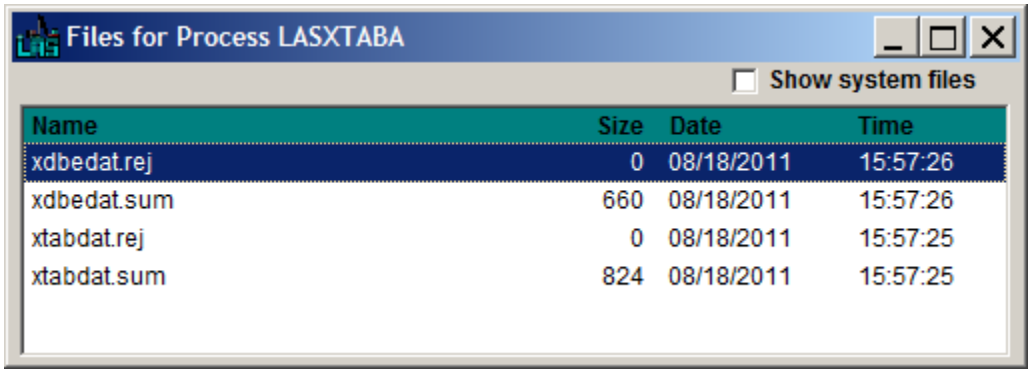
(*Process Status List Window*)

20	Double-click the **process name**.	The **Process File List** window will appear.

Continued on Following Page

Loading Hand-Entered Bids into LAS

(continued)



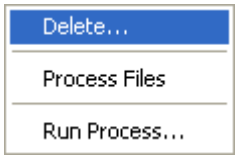
(*Process File List Window*)

If the **xtabdat.rej** file has a size larger than 0, you will need to open it in order to see what errors are contained so that you will be able to fix them.

21	Close the **Process File** List window.	You will return to the **Process Status List** window.

You will need to delete your process from the list.

22	Right-click on the **process name**.	A right-click menu will appear.

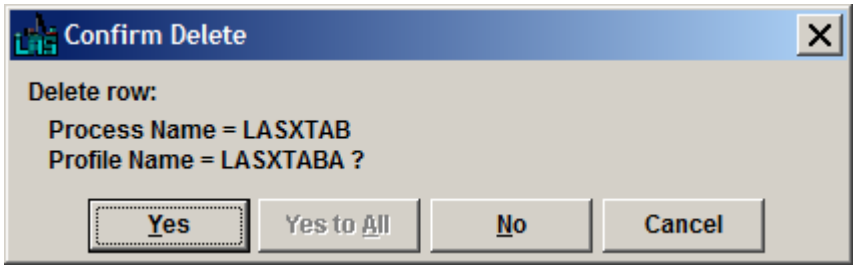


23	Select **DELETE** from the menu.	The following message will appear.

Continued on Following Page

Loading Hand-Entered Bids into LAS

(continued)



24	Click the **YES** button.	The process will be deleted.

If the process is unsuccessful, try to determine the error/s and how to fix it/them from the system prompts. If you received an error, it may not apply to your project.

Read the **PROCLOG** file to ensure that the error is relevant. If the error is relevant and valid, open the **XtabDat.dat** file in UltraEdit, WordPad or other text editor and edit it to fix the error(s). If you do not know how to fix the error(s), contact the SPECS Help Desk.

Once all errors are fixed, repeat this procedure.

25	If this process has run successfully, all hand-entered bids have been loaded.

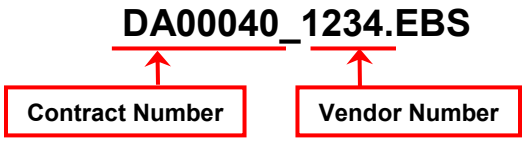
IMPORTANT! Make sure to delete the **XtabDat.dat** file from the previous letting **BEFORE** entering bids for a new letting.

Loading Electronically Submitted Bids into LAS

As mentioned earlier, some contractors submit their bids on paper forms. Other contractors provide their bids in both forms (paper and electronic) to NCDOT. The electronic forms must go through a process that allows all bids to be combined for comparison purposes.

🗁**NOTE:** These are **.EBS** files that will be converted to one **.DAT** file.

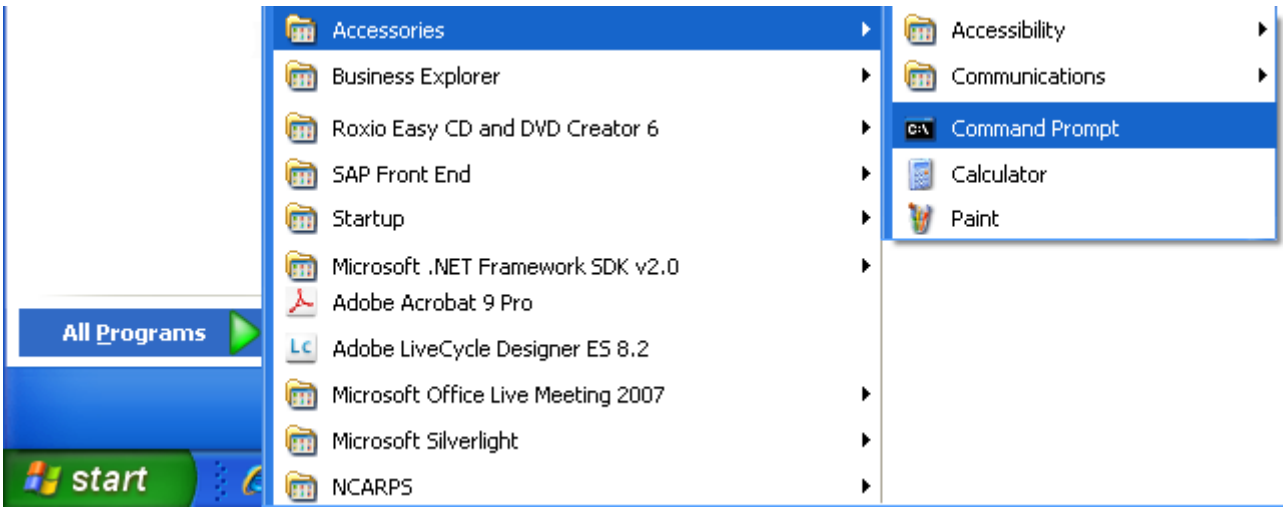
	Step	Action	Result
Loading Contractor Information from Portable Media	1	Rename the **XtabDat.DAT** & **XdbeDat.DAT** files in **C:\Program Files\Expedite5.9a\Load**. These files will be overwritten and you may need them for backup. 🗁**NOTE:** Do not skip this step. It is **VERY IMPORTANT.**	
Copying the Vendor File to your hard drive.	2	Copy the **.EBS** file given to you from the vendor to the **C:\Program Files\Expedite5.9a\Load** directory. ***Repeat this process for each vendor.***	
Renaming the vendor file	3	Rename the **.EBS** file as shown below: 🗁**NOTE:** If there are multiple vendors, do this for each.	



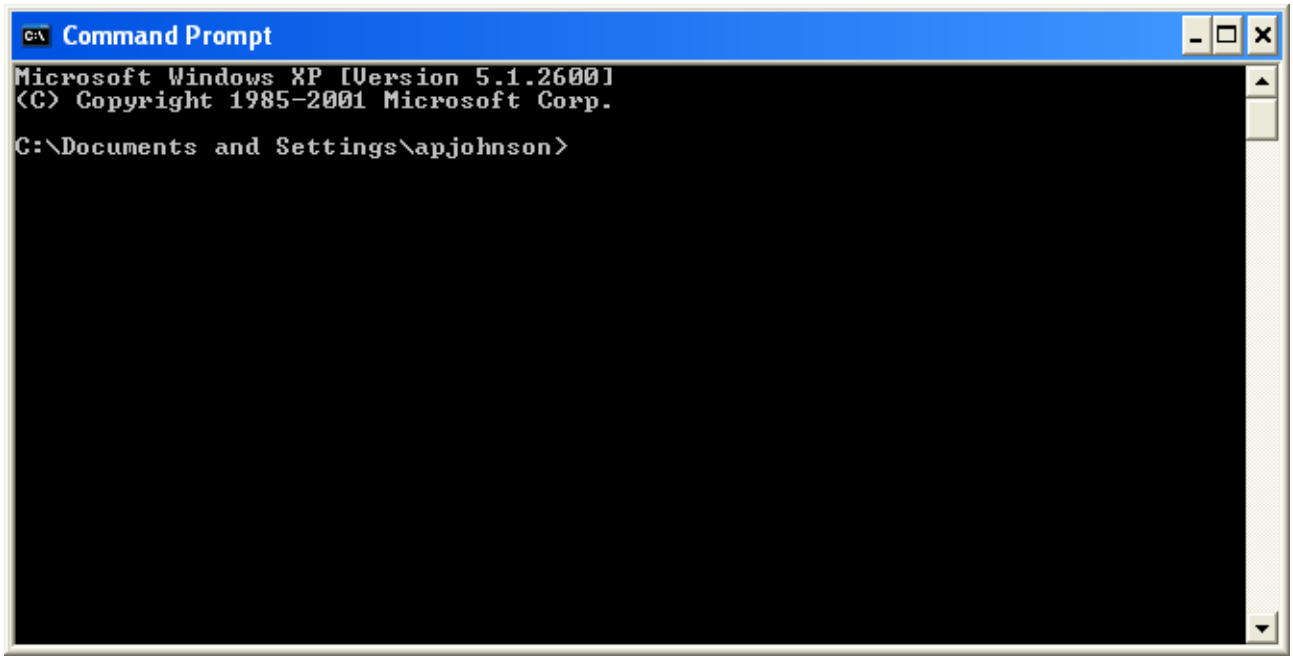
Continued on Following Page

Loading Electronically Submitted Bids into LAS

(continued)



4	From the **START** menu, select **ALL PROGRAMS**, then **ACCESSORIES**, and click on **COMMAND PROMPT**.	The **Command Prompt** window will appear.



(*Command Prompt Window*)

Continued on Following Page

Loading Electronically Submitted Bids into LAS

(continued)

5	Type **cd\Program Files\Expedite5.9a\Load** and press the Enter key.

All Files

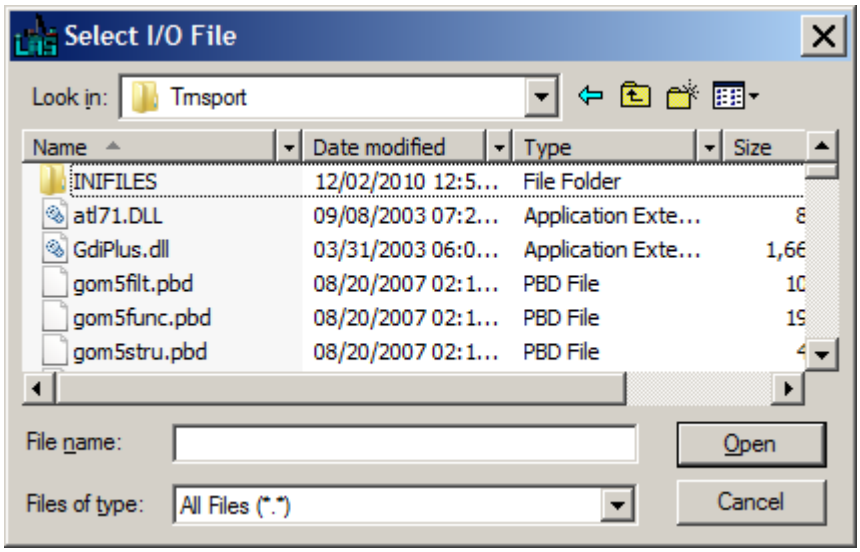
6	Type **load *.ebs** Then press the Enter key. **NOTE:** This process will concatenate all of the bids received on all portable media to create one **XtabDat.DAT** and one **XdbeDat.DAT** file.

Now you will need to load the **XtabDat.DAT** and **XdbeDat.DAT** files on the Letting Administrator PC into Trns•port.

Once you have successfully logged into **Trns•port LAS**:

Uploading the XtabDat.DAT File

7	Select **UPLOAD FILE**, then **PROCESS I/O FILE** from the **UTILITIES** drop-down menu.	The **Select I/O File** dialog will appear.



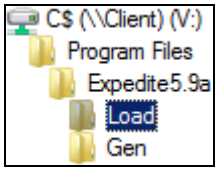
(*Select I/O File Dialog*)

Continued on Following Page

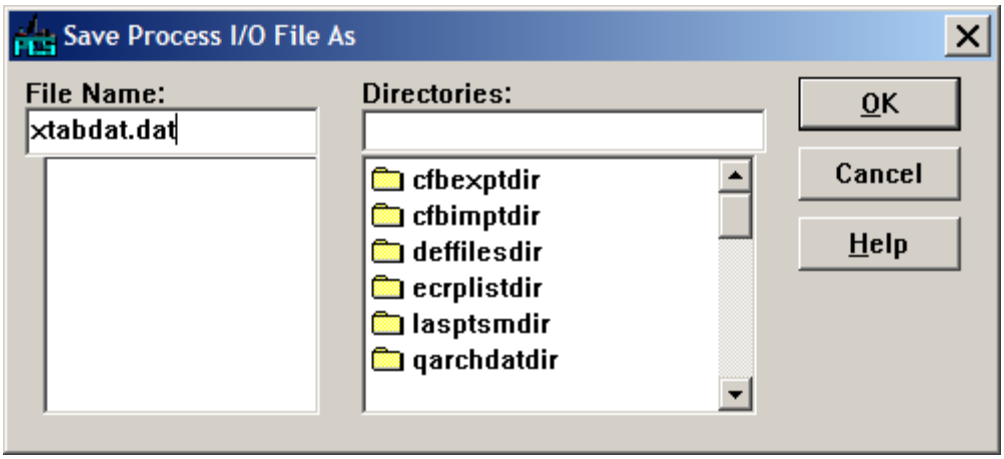
Loading Electronically Submitted Bids into LAS

(continued)

8	Select **C$ (\\CLIENT) (V:)** from the drop-down list in the **LOOK IN** field.	N/A
9	Navigate to the **\Program Files\Expedite5.9a\Load** directory.	N/A



10	Click on the **XtabDat.DAT** file to select it.	N/A
11	Click the **OPEN** button.	The **Save Process I/O File As** dialog will appear.



(*Save Process I/O File As Dialog*)

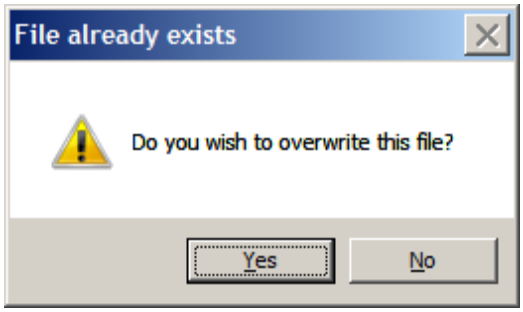
12	Double-click on the **qbidtabdir** directory to open it.	N/A
13	Click the **OK** button. **NOTE:** You may receive a message box asking if you want to overwrite this file. If you receive this message, click the **YES** button.	The file has been saved to the **qbidtabdir** directory.

Continued on Following Page

Loading Electronically Submitted Bids into LAS

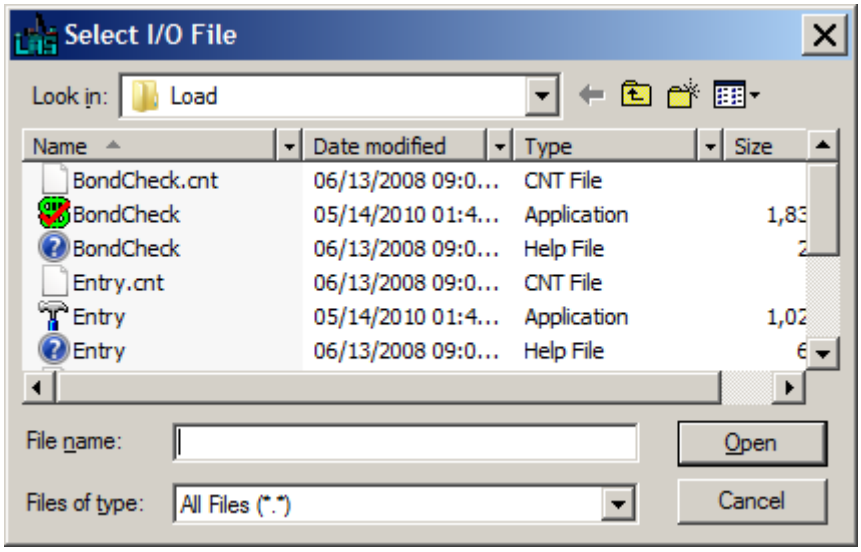
(continued)

NOTE: If you have another **xtabdat.dat** file in this location, you will receive a warning that it will be overwritten. Click the **YES** button to overwrite the file.



Uploading the Xdbedat.dat File

14	Select **UPLOAD FILE**, then **PROCESS I/O FILE** from the **UTILITIES** drop-down menu.	The **Select I/O File** dialog will appear.



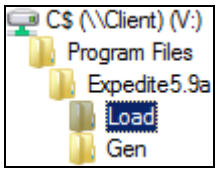
(*Select I/O File Dialog*)

15	Select **C$ (\\CLIENT) (V:)** from the drop-down list in the **LOOK IN** field.	N/A
16	Navigate to the **\Program Files\Expedite5.9a\Load** directory.	N/A

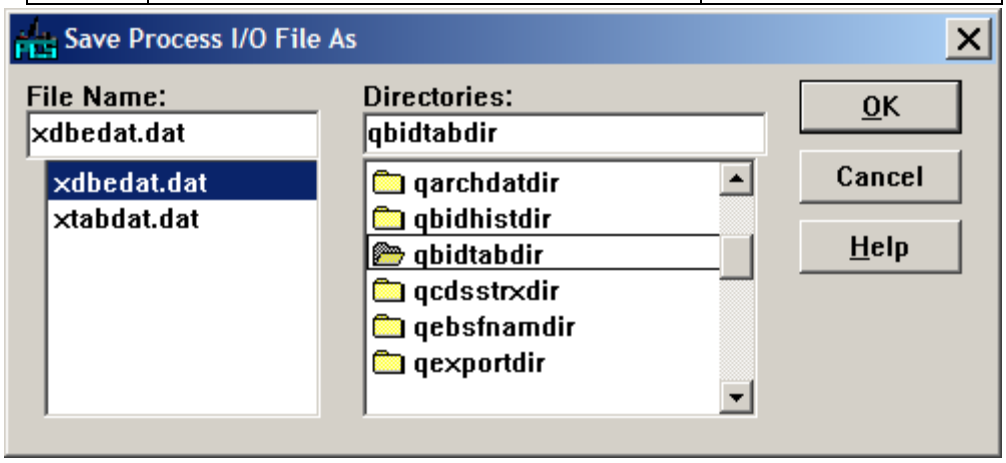
Continued on Following Page

Loading Electronically Submitted Bids into LAS

(continued)



17	Click on the **xdbedat.dat** file to select it.	N/A
18	Click the **OPEN** button.	The **Save Process I/O File As** dialog will appear.



(*Save Process I/O File As Dialog*)

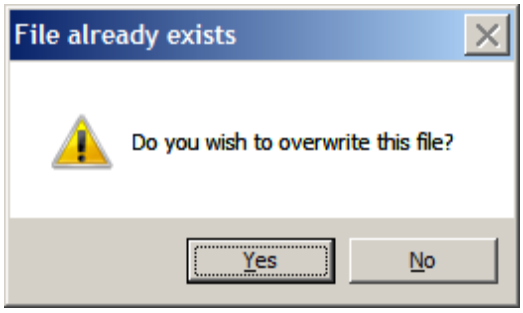
19	Double-click on the **qbidtabdir** directory to open it.	N/A
20	Click the **OK** button. 🗁**NOTE:** You may receive a message box asking if you want to overwrite this file. If you receive this message, click the **YES** button.	The file has been saved to the **qbidtabdir** directory.

Continued on Following Page

Loading Electronically Submitted Bids into LAS

(continued)

🗁**NOTE:** If you have another **xdbedat.dat** file in this location, you will receive a warning that it will be overwritten. Click the **YES** button to overwrite the file.

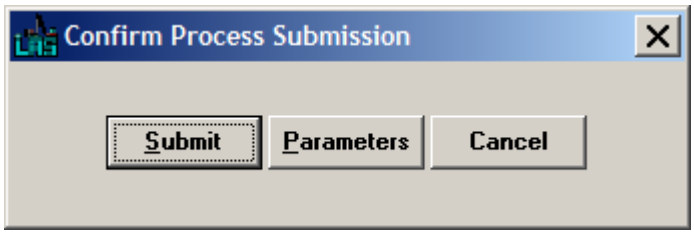


Running the Load Bid Tabs Process

Now you will need to run the process that will load the bid tab data you just uploaded into the appropriate letting.

21	Select **IMPORT**, then **LOAD BID TABS** from the **FILE** drop-down menu.	The **Confirm Process Submission** dialog will appear.

This process creates a report that can detect errors such as incorrect line numbers, non-existent bidders or vendors, and alternate items not coded correctly.

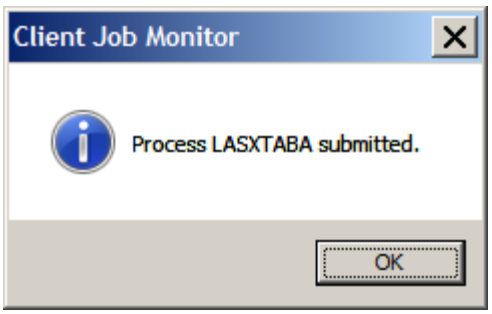


22	Click the **SUBMIT** button.	The following message will appear.

Continued on Following Page

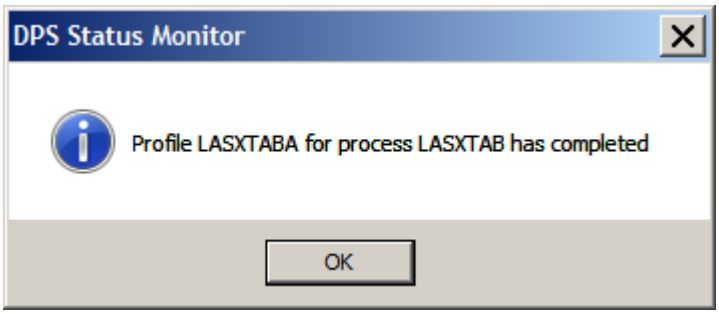
Loading Electronically Submitted Bids into LAS

(continued)



23	Click the **OK** button.	The following message will appear.

🗁**NOTE:** This could take several minutes before the process completes.



24	Click the **OK** button.	N/A

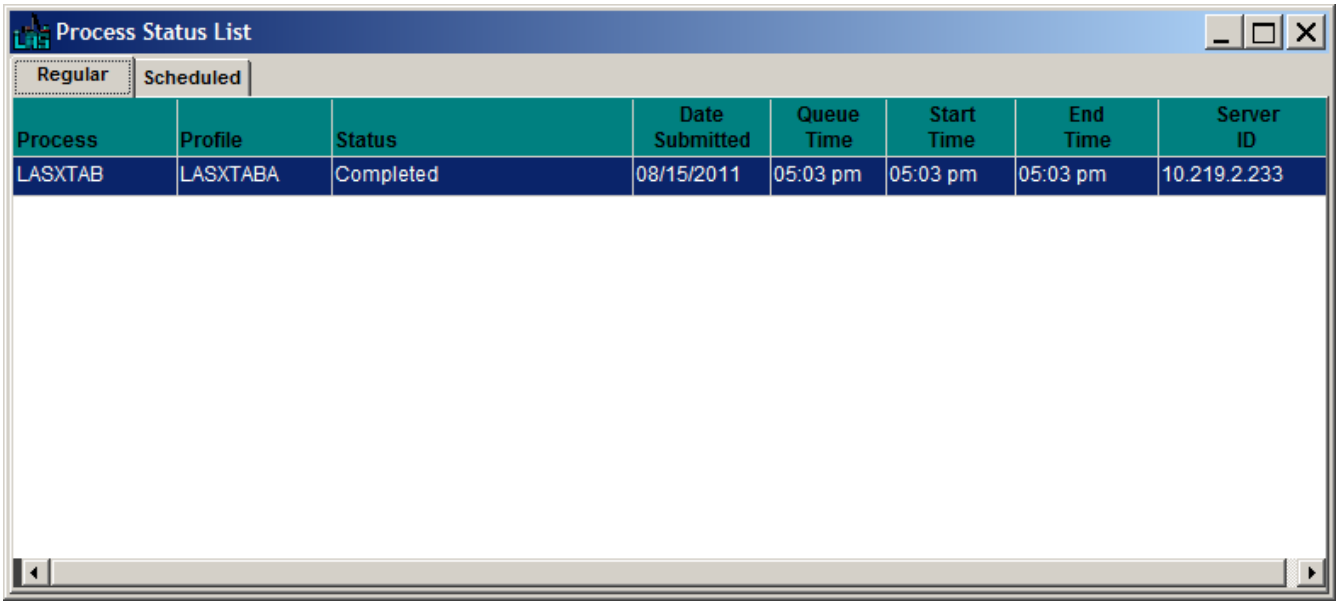
Once the process has completed, you must determine if it was successful.

25	Select **PROCESS STATUS** from the **FILE** drop-down menu.	The **Process Status List** window will appear.

Continued on Following Page

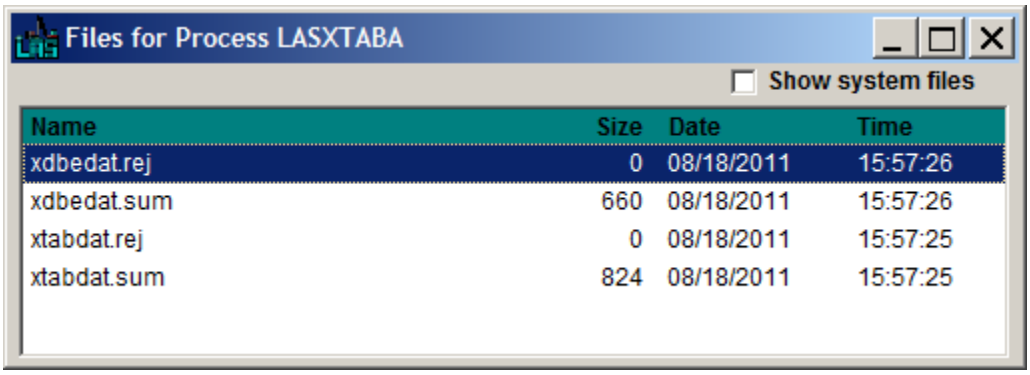
Loading Electronically Submitted Bids into LAS

(continued)



(*Process Status List Window*)

26	Double-click the **process name**.	The **Process File List** window will appear.



(*Process File List Window*)

Continued on Following Page

Loading Electronically Submitted Bids into LAS

(continued)

Ignore the following files: **xdbedat.rej** and **xdbedat.sum**. We do not use these files.

If the **xtabdat.rej** file has a size larger than 0, you will need to open it in order to see what errors are contained so that you will be able to fix them.

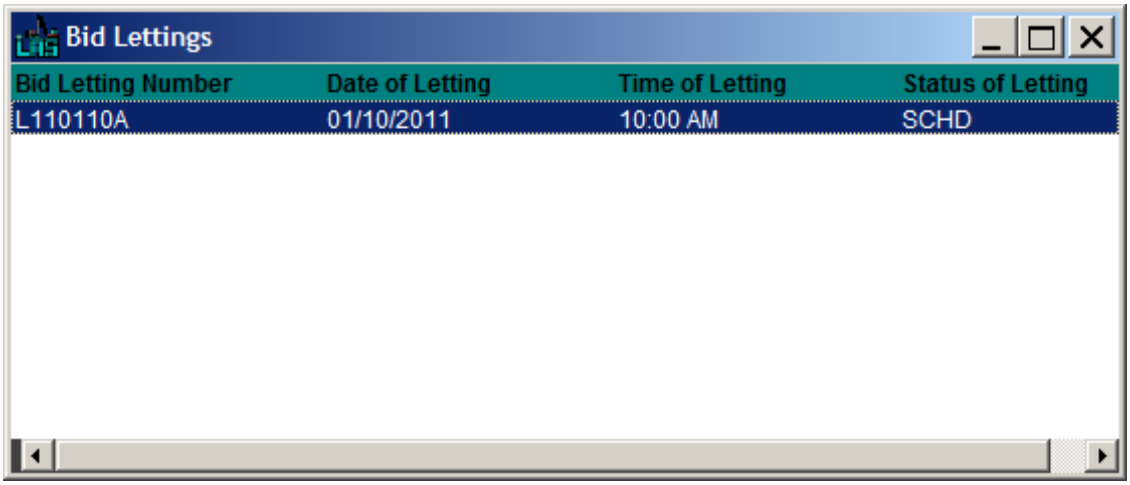
If the error is relevant and valid, open the **XtabDat.dat** file in UltraEdit, WordPad or other text editor and edit it to fix the error(s). If you do not know how to fix the error(s), contact the SPECS Help Desk.

Once all errors are fixed, repeat this procedure.

Reconciling Bids in LAS

Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.



(*Bid Lettings Window*)

2	Right-click on the **bid letting** that you are currently working with.	A right-click menu will appear.

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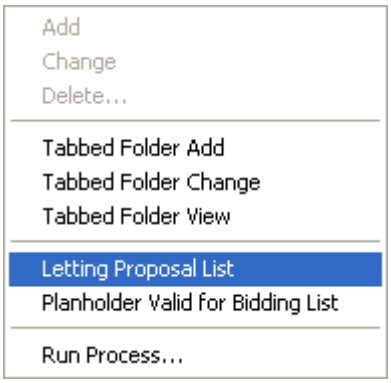
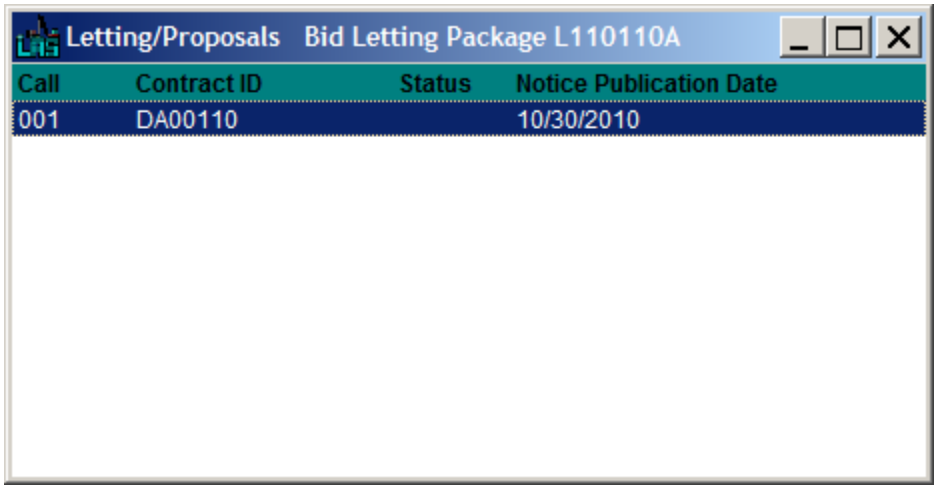
Reconciling Bids in LAS

(continued)



3	Select **LETTING PROPOSAL LIST** from the menu.	The **Letting/Proposals Bid Letting Package** window will appear.



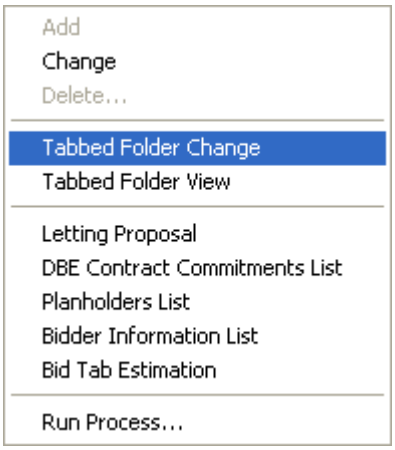
(*Letting/Proposals Bid Letting Package Window*)

4	Right-click on the **contract that requires changing**.	A right-click menu will appear.

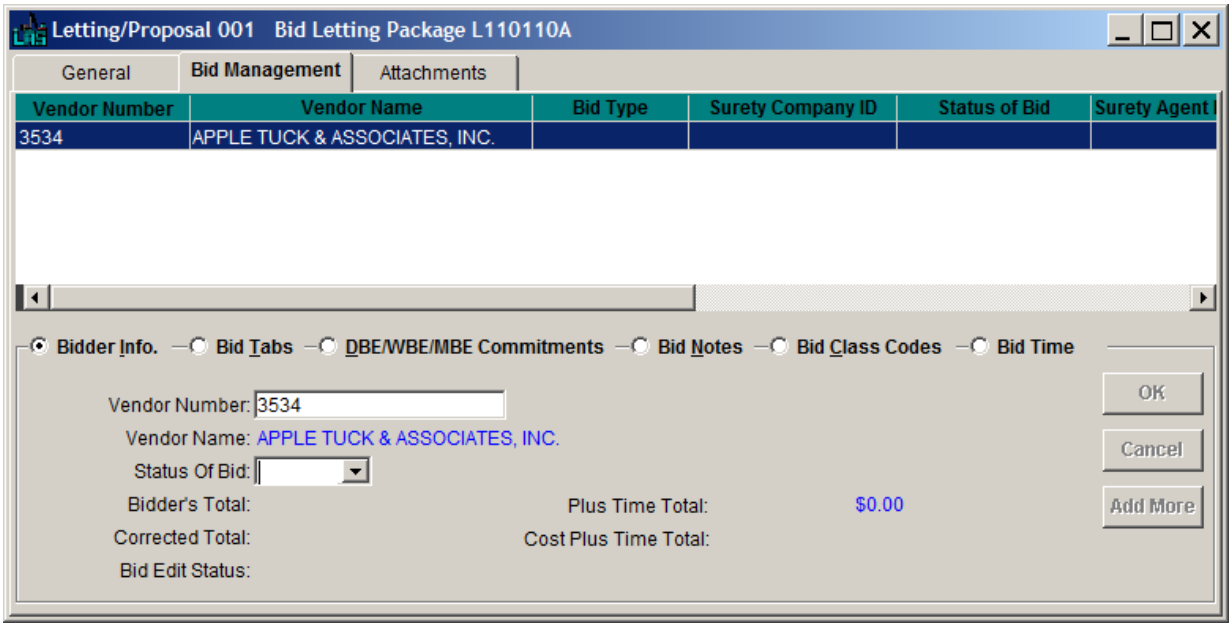
Continued on Following Page

Reconciling Bids in LAS

(continued)



5	Select **TABBED FOLDER CHANGE** from the menu.	The **Letting/Proposal** will open to the **General** tab.
6	Click the **Bid Management** tab.	The **Bid Management** tab will be brought forward.



(*Bid Management Tab*)

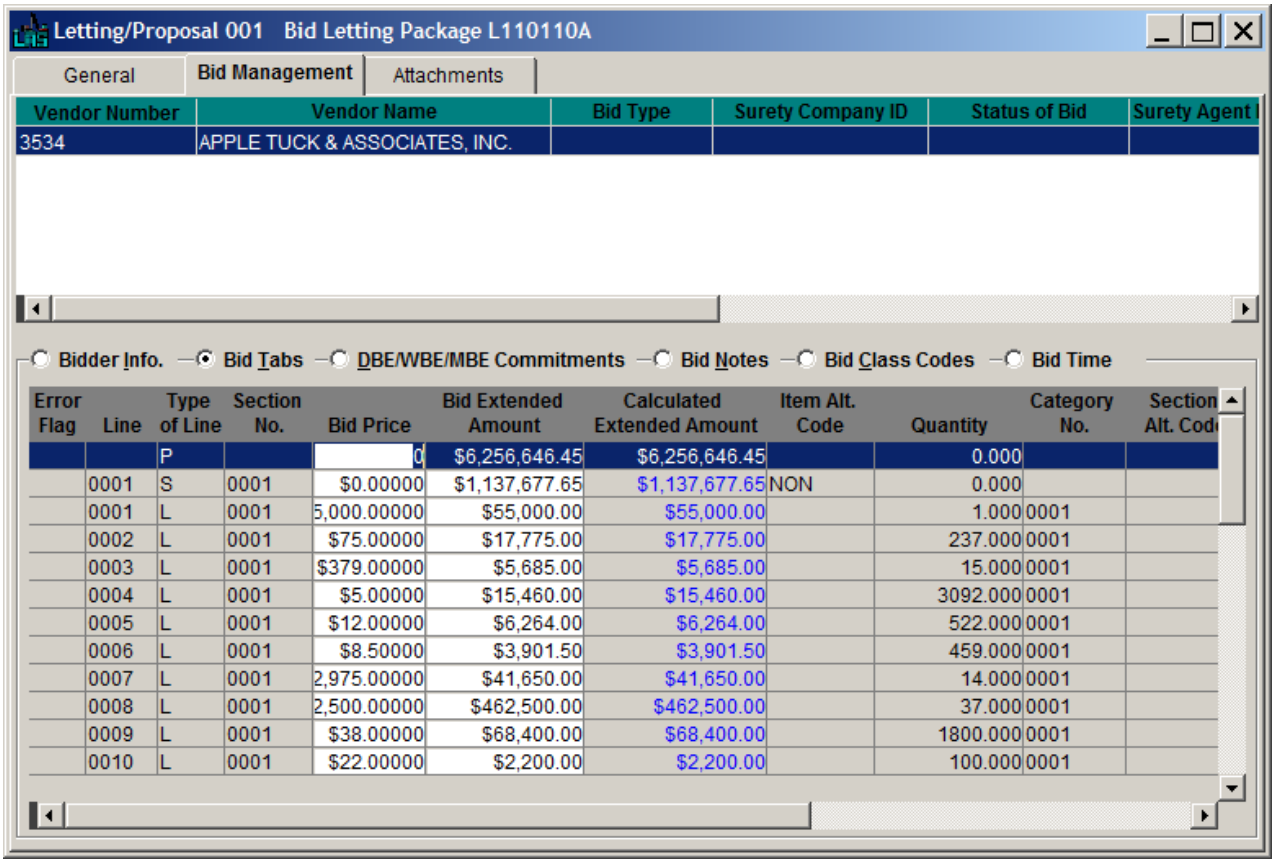
Continued on Following Page

Reconciling Bids in LAS

(continued)

If there are multiple bidders listed in the top pane of the screen, ensure that the correct vendor name is highlighted. The screen default to the first vendor listed, which can cause confusion.

7	Click the **BID TABS** radio button.	The **Bid Tabs** tab will be brought forward.



(*Bid Tabs Tab*)

8	Make changes as needed.	N/A

Continued on Following Page

Reconciling Bids in LAS

(continued)

9	Select **CONSISTENCY CHECKING** from the **EDIT** drop-down menu.	An error flag will appear next to all lines which contain an error.

This check will detect errors in the bid and place an **X** in the **ERROR FLAG** column. Line items with no errors will have a in the **ERROR FLAG** column.

For items with errors, investigate to find the cause and correct it.

NOTE: A contractor may only bid one side of the alternate. If there are bids on more than one side, including $0 bids, these bids must be cleaned out in the bid price and bid extended amount fields.

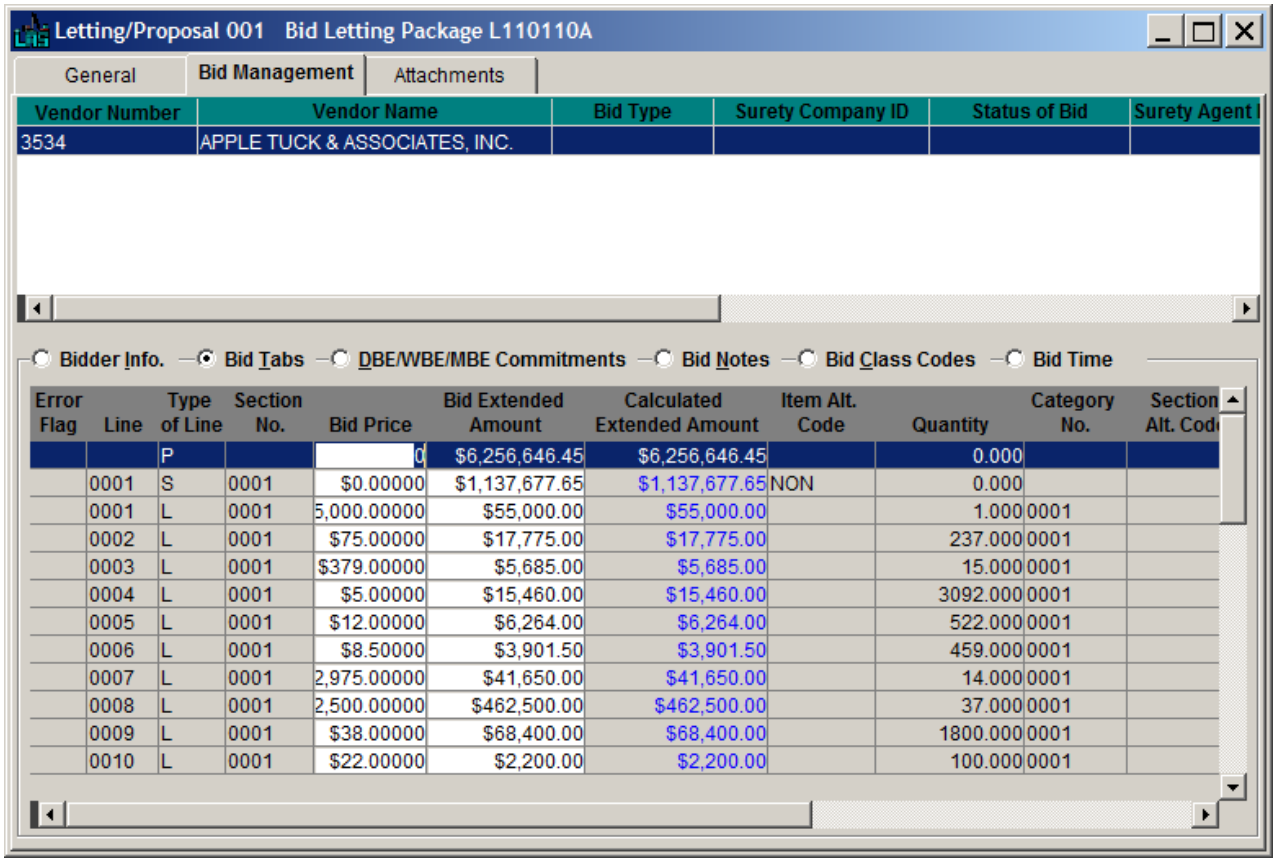
Some items might be marked as an error when the **Bid Extended Amount** equals the **Calculated Extended Amount**. These cases are often caused by rounding (due to the bidder carrying past 2 decimal places), which you are unable to see. We have no control over this problem, so these instances are acceptable.

IMPORTANT!

If you ever need to correct a final total in a bid, **YOU MUST** go into the details **AND** correct the **SECTION TOTALS** as well because some reports use section totals instead of final totals. After you do this, repeat step **9** and re-verify that all totals are in order.

Adding Notes for Bid Irregularities

Each proposal that is received must conform to NCDOT Specifications. If any of the rules are not met, you will have to make a note of them to explain their inconsistencies.



(*Bid Tabs Tab*)

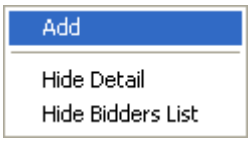
From the **Bid Tabs** tab:

Step	Action	Result
1	Click the **BID CLASS CODES** radio button.	The **Bid Class Codes** tab will be brought forward.
2	Right click in the blank area of the tab.	A right-click menu will appear.

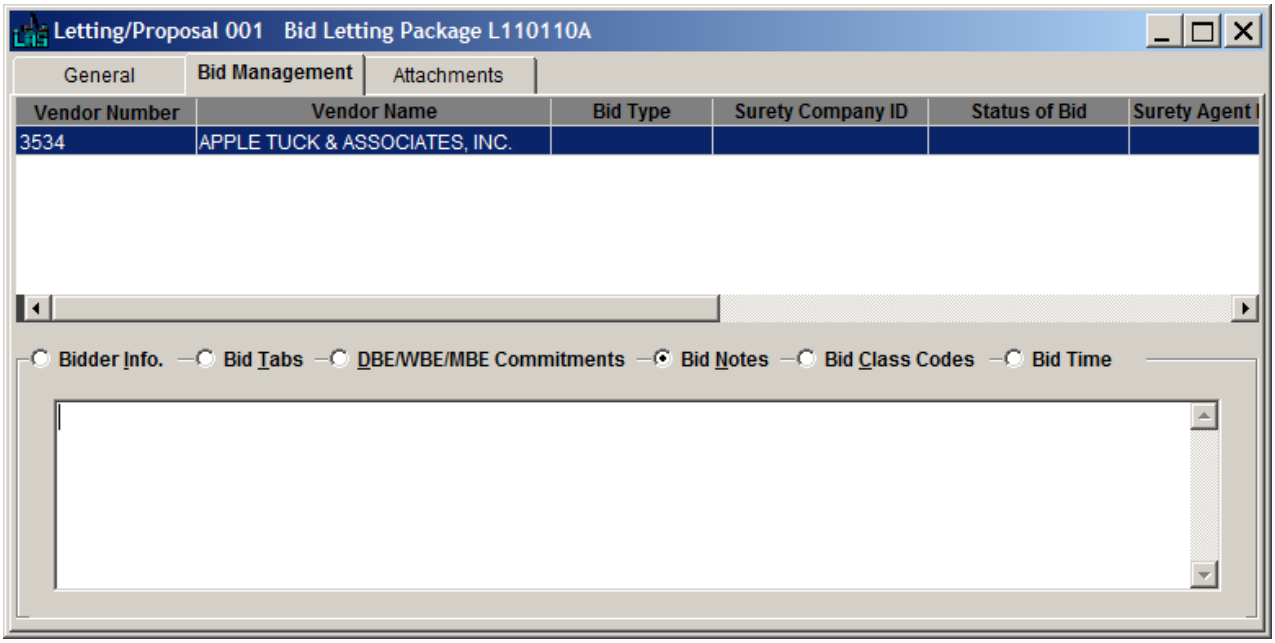
Continued on Following Page

Adding Notes for Bid Irregularities

(continued)



3	Select **ADD** from the menu.	A blank line will appear highlighted.
4	Select the applicable **code (rule that was not followed)** from the drop-down list in the **BID CLASS CODE** field. 🗁**NOTE:** This is a list of the rules that contractors should observe when submitting bids.	The **CODE DESCRIPTION** field will default.
5	Click the **BID NOTES** radio button.	The **Bid Notes** tab will be brought forward.



(*Bid Notes Tab*)

Continued on Following Page

Adding Notes for Bid Irregularities

(continued)

6	Type an explanation of any irregularities associated with the bid class code in the field provided for that bid. Describe the rule not followed in detail	N/A

🗁**NOTE:** Information entered into the **BID NOTES** field and **BID CLASS CODE** entries will print out in **Item C** report and **Bid Tabs**.

7	Click the **SAVE FOLDER** button.	The information will be saved

Processes Required for Bid Analysis

After all bids have been edited, corrected (if required), and flagged (if required), it is now time to analyze them.

This is done by running 3 reports via processes in LAS.

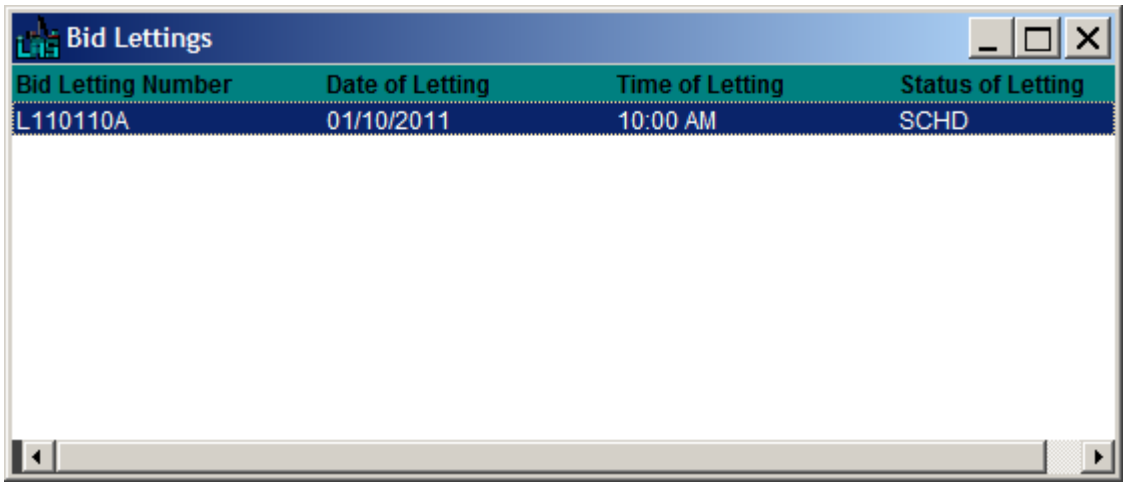
- Generate Bid Tab Edit Report
- Generate Bid Tab Analysis
- Generate Bid Letting Summary

You will need to run all of these processes because the information generated by them will populate tables within the system that are needed for the letting to proceed and report generation to occur properly.

From the **Letting/Proposals Bid Letting Package** window:

Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.



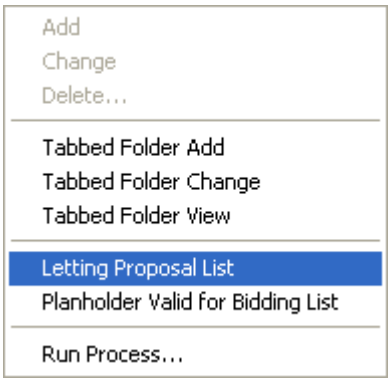
(*Bid Lettings Window*)

2	Right-click on the **bid letting** that you are currently working with.	A right-click menu will appear.

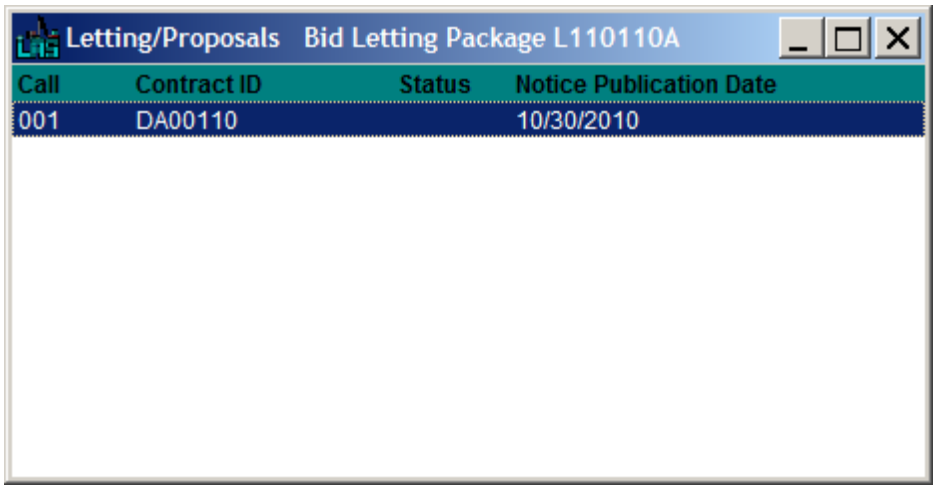
Continued on Following Page

Processes Required for Bid Analysis

(continued)



3	Select **LETTING PROPOSAL LIST** from the menu.	The **Letting/Proposals Bid Letting Package** window will appear.



(*Letting/Proposals Bid Letting Package Window*)

4	Right-click the **proposal** you are working on.	A right-click menu will appear.

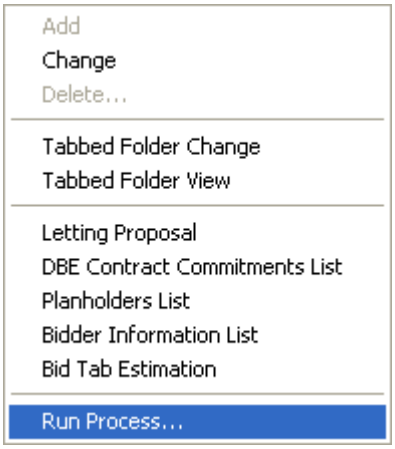
Continued on Following Page

Processes Required for Bid Analysis

(continued)

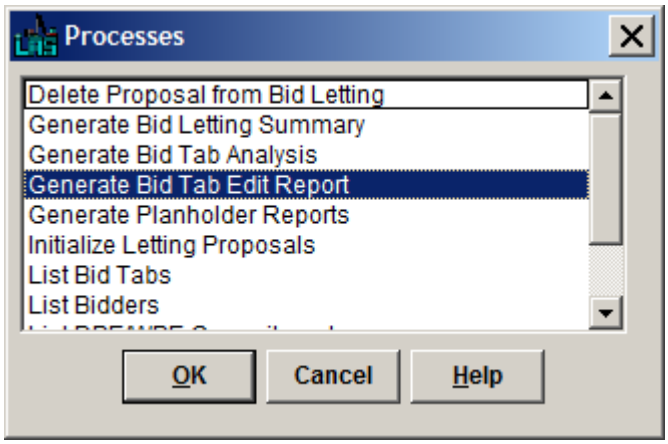
If you would like to select multiple proposals at the same time, hold down the Ctrl key and click each proposal you wish to select.

If the proposals are sequential, you can hold down the Shift key and click the beginning and ending proposals in the sequence.



The Bid Tab Edit Report

5	Select **RUN PROCESS…** from the menu.	The **Processes** dialog will appear.



(*Processes Dialog*)

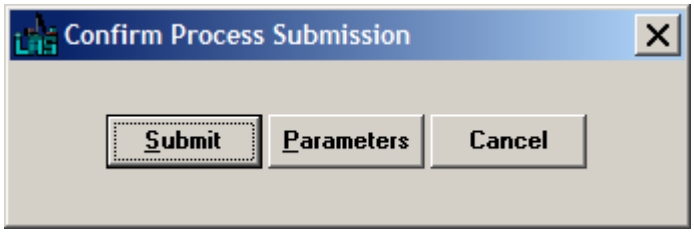
6	Select **GENERATE BID TAB EDIT REPORT**.	N/A

Continued on Following Page

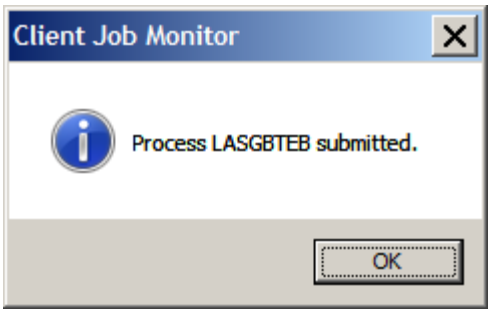
Processes Required for Bid Analysis

(continued)

7	Click the **OK** button.	The **Confirm Process Submission** dialog will appear.

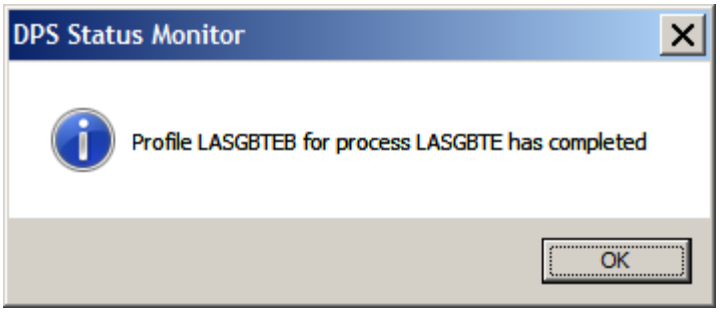


8	Click the **SUBMIT** button.	The following message will appear.



9	Click the **OK** button.	The following message will appear.

NOTE: This could take several minutes before the process completes.



10	Click the **OK** button.	N/A

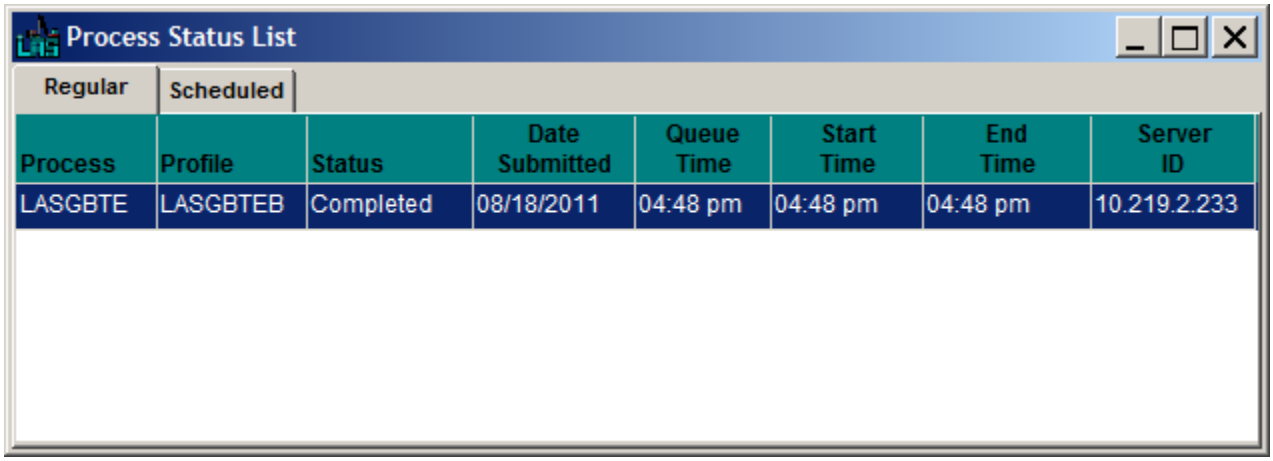
Continued on Following Page

Processes Required for Bid Analysis

(continued)

Once the process has completed, you must determine if it was successful.

11	Select **PROCESS STATUS** from the **FILE** drop-down menu.	The **Process Status List** window will appear.



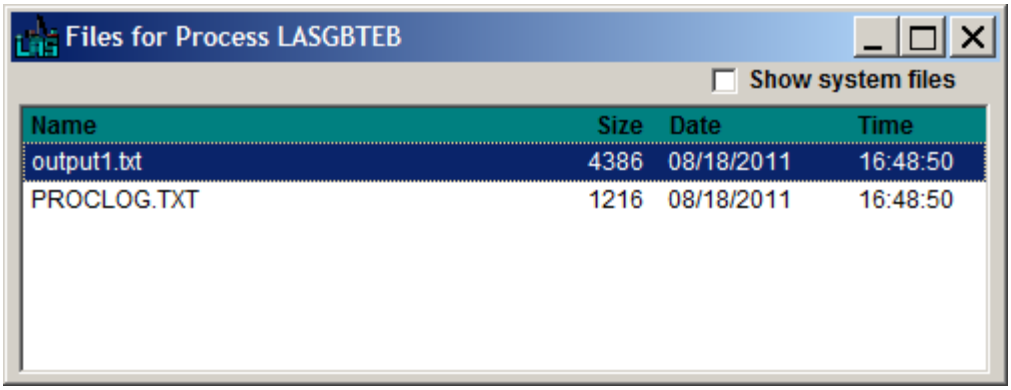
(*Process Status List Window*)

12	Double-click the **process name**.	The **Process File List** window will appear.

Continued on Following Page

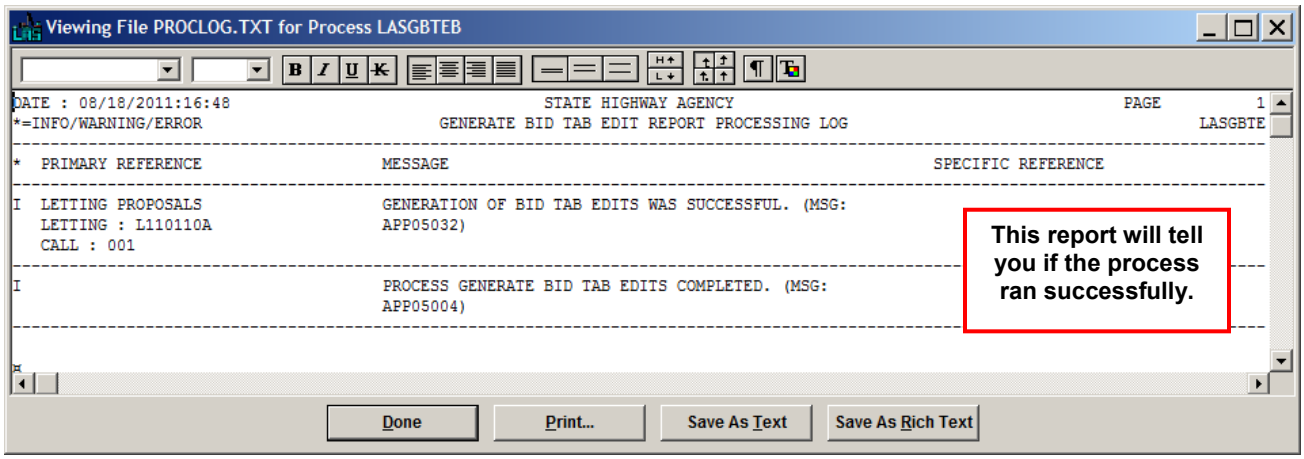
Processes Required for Bid Analysis

(continued)



(*Process File List Window*)

13	Double-click the **PROCLOG.TXT** file.	The file will open.



(*PROCLOG.TXT File Window*)

14	Click the **DONE** button.	The file will close and you will return to the **Process File List** window.
15	Close the **PROCESS FILE LIST** window.	You will return to the **Process Status List** window

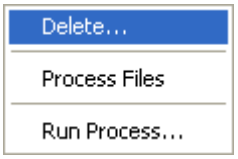
Continued on Following Page

Processes Required for Bid Analysis

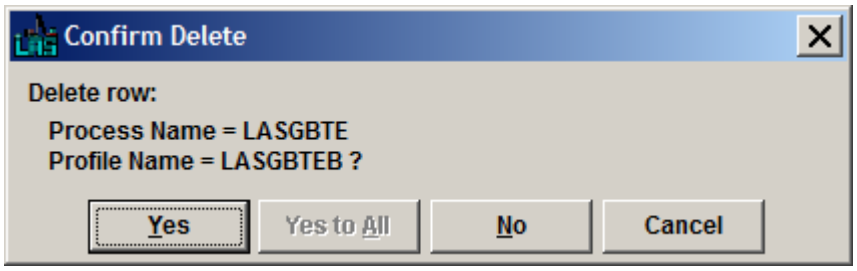
(continued)

You will need to delete this process from the status list now.

16	Right-click on the **process name**.	A right-click menu will appear.



17	Select **DELETE** from the menu.	The following message will appear.

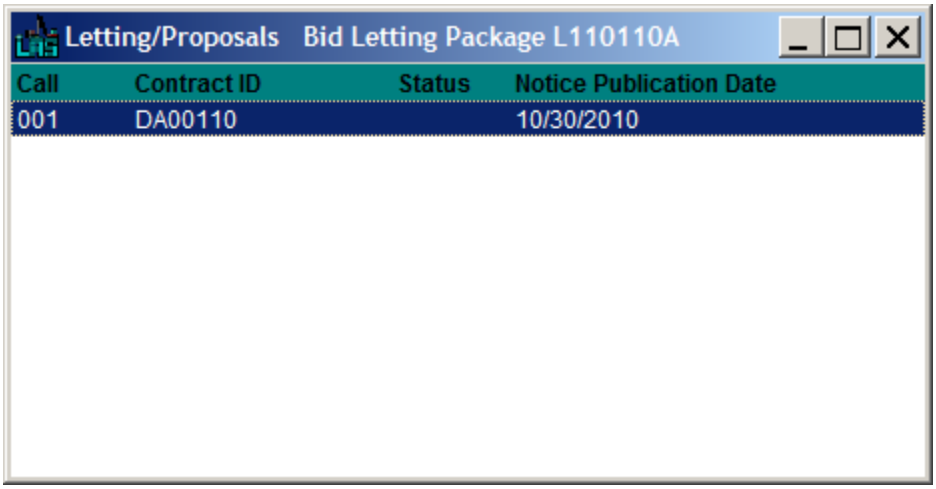


18	Click the **YES** button.	The process will be deleted from the list.
19	Close the **PROCESS STATUS LIST** window.	You will return to the **Letting/Proposals Bid Letting Package** window:

Continued on Following Page

Processes Required for Bid Analysis

(continued)



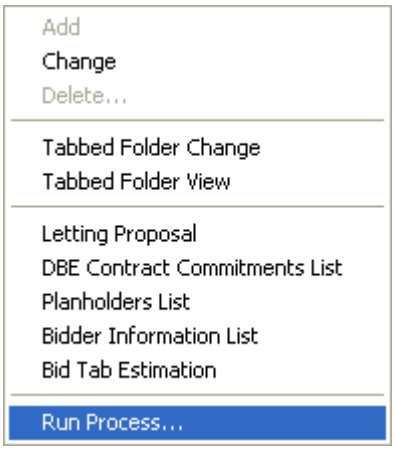
(*Letting/Proposals Bid Letting Package Window*)

Bid Tab Analysis

20	Right-click the **selected proposal**.	A right-click menu will appear.

If you would like to select multiple proposals at the same time, hold down the Ctrl key and click each proposal you wish to select.

If the proposals are sequential, you can hold down the Shift key and click the beginning and ending proposals in the sequence.



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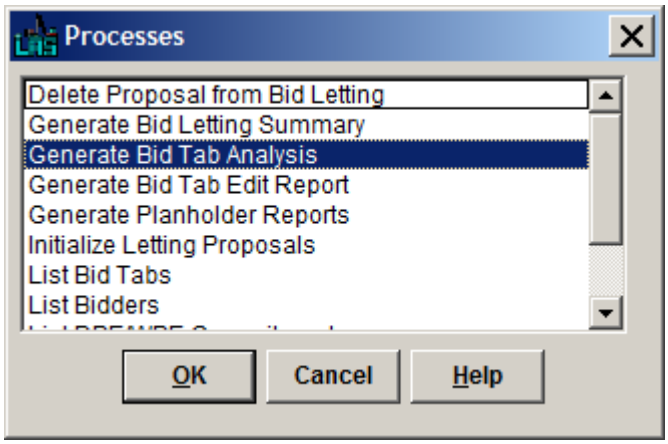
Processes Required for Bid Analysis

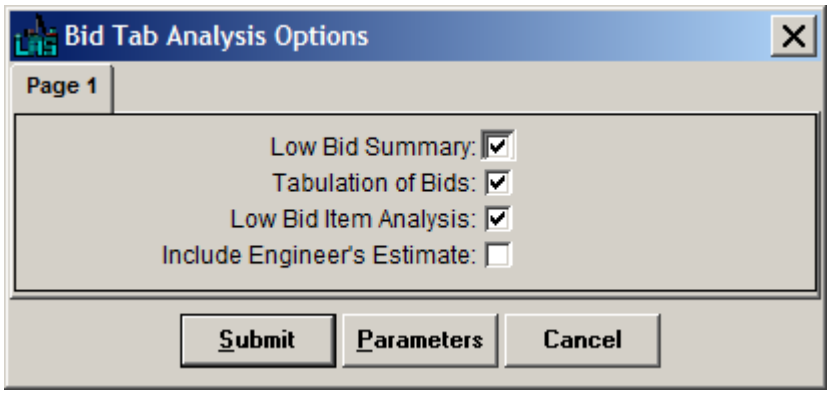
(continued)

21	Select **RUN PROCESS…** from the menu.	The **Processes** dialog will appear.



(*Processes Dialog*)

22	Select **GENERATE BID TAB ANALYSIS**.	N/A
23	Click the **OK** button.	The **Bid Tab Analysis Options** dialog will appear.



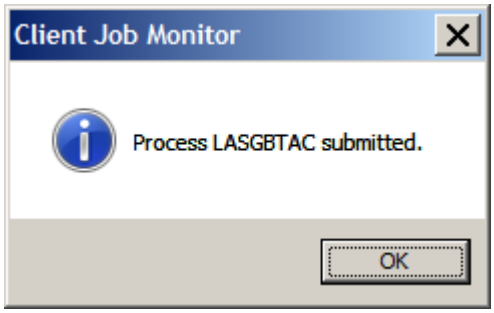
24	Make sure the applicable check boxes are checked or unchecked.	N/A

Continued on Following Page

Processes Required for Bid Analysis

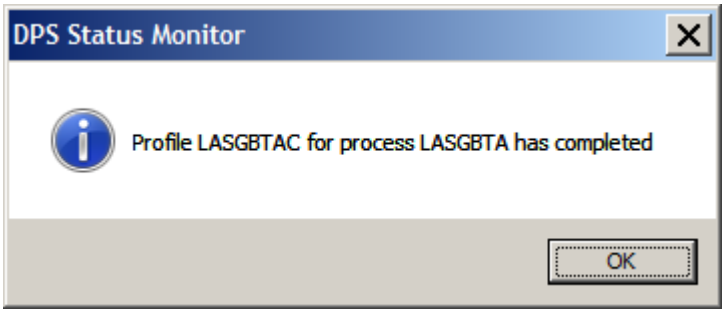
(continued)

25	Click the **SUBMIT** button.	The following message will appear.



26	Click the **OK** button.	The following message will appear.

🗁**NOTE:** This could take several minutes before the process completes.



27	Click the **OK** button.	N/A

Continued on Following Page

Processes Required for Bid Analysis

(continued)

The submitted bids will be compared with each other and with the engineer's estimates. The results of this process can be used to evaluate bids and award contracts.

This process updates the letting/proposal **AWARDED VENDOR** and **AWARDED AMOUNT** fields with the low bidder's ID and estimated bid amount respectively. Award decisions may be manually updated as well.

🗁**NOTE:** If the Bid Edit Status for the letting/proposal is **I**, the award information will not be updated by the **Generate Bid Tab Analysis** process.

See the Reports section for how to run the Generate Bid Tab Analysis report.

Once the process has completed, you must determine if it was successful.

28	Select **PROCESS STATUS** from the **FILE** drop-down menu.	The **Process Status List** window will appear.
29	Double-click the **process name**.	The **Process File List** window will appear.
30	Double-click the **PROCLOG.TXT** file.	The file will open.
31	Make sure the process has completed successfully.	N/A
32	Click the **DONE** button.	The file will close and you will return to the **Process File List** window.
33	Close the **PROCESS FILE LIST** window.	You will return to the **Process Status List** window

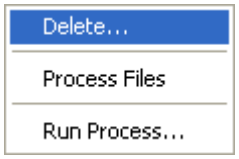
Continued on Following Page

Processes Required for Bid Analysis

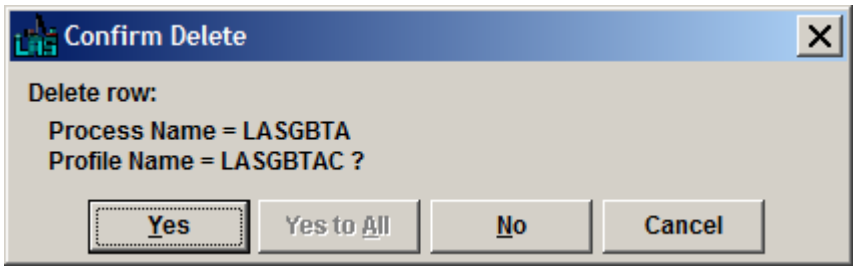
(continued)

You will need to delete this process from the status list now.

34	Right-click on the **process name**.	A right-click menu will appear.



35	Select **DELETE** from the menu.	The following message will appear.

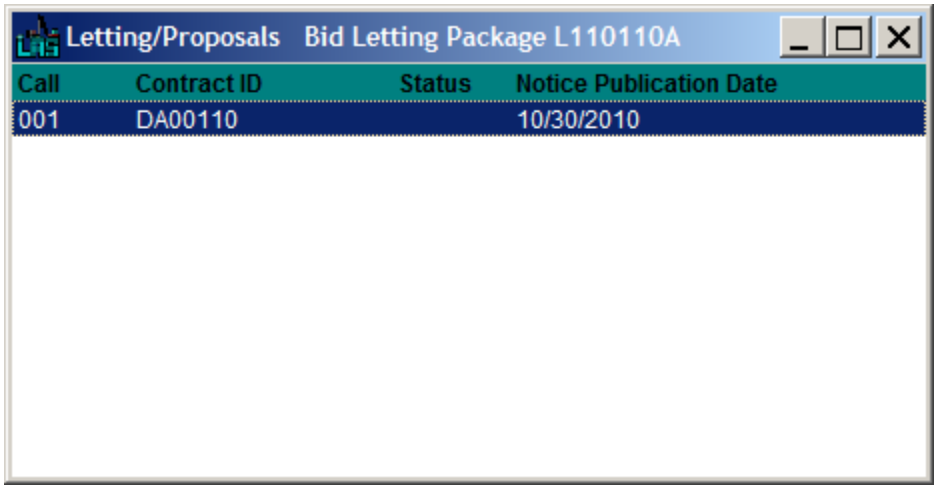


36	Click the **YES** button.	The process will be deleted from the list.
37	Close the **PROCESS STATUS LIST** window.	You will return to the **Letting/Proposals Bid Letting Package** window:

Continued on Following Page

Processes Required for Bid Analysis

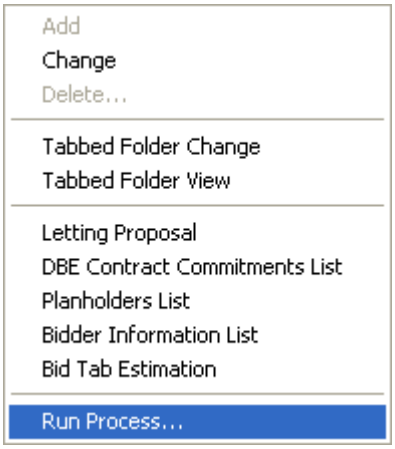
(continued)



(*Letting/Proposals Bid Letting Package Window*)

Bid Letting Summary

38	Right-click the **selected proposal**.	A right-click menu will appear.

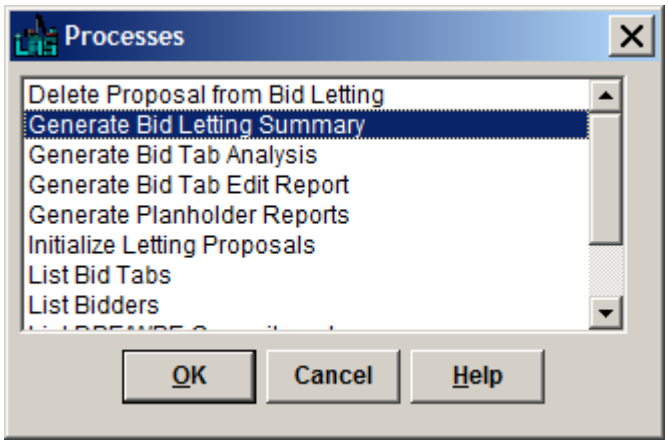


39	Select **RUN PROCESS…** from the menu.	The **Processes** dialog will appear.

Continued on Following Page

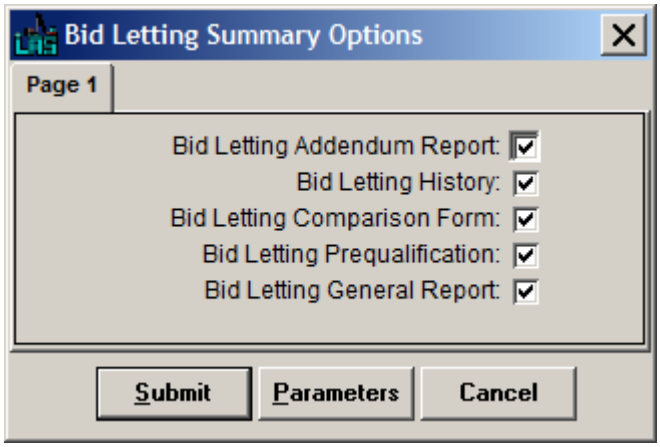
Processes Required for Bid Analysis

(continued)



(*Processes Dialog*)

40	Select **GENERATE BID LETTING SUMMARY**.	N/A
41	Click the **OK** button.	The **Bid Letting Summary Options** dialog will appear.



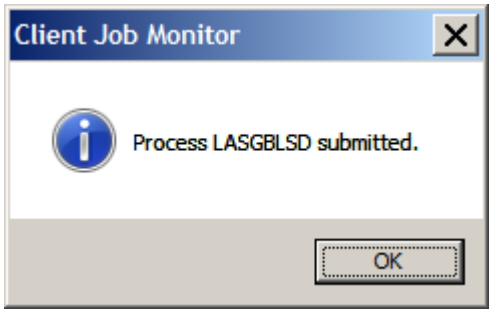
42	Make sure the applicable check boxes are checked or unchecked.	N/A

Continued on Following Page

Processes Required for Bid Analysis

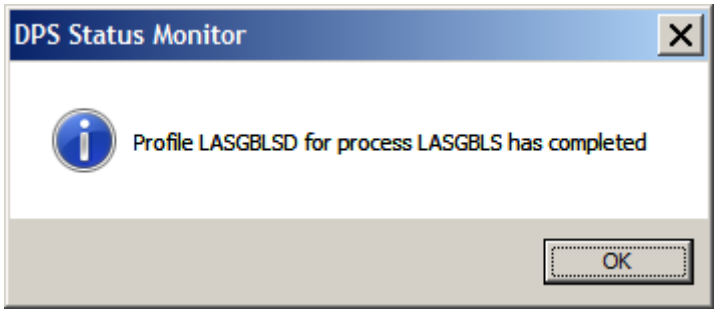
(continued)

43	Click the **SUBMIT** button.	The following message will appear.



44	Click the **OK** button.	The following message will appear.

🗁**NOTE:** This could take several minutes before the process completes.



45	Click the **OK** button.	N/A

Once the process has completed, you must determine if it was successful.

46	Select **PROCESS STATUS** from the **FILE** drop-down menu.	The **Process Status List** window will appear.

Continued on Following Page

Processes Required for Bid Analysis

(continued)

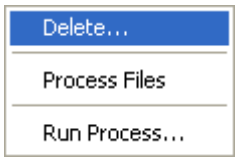
47	Double-click the **process name**.	The **Process File List** window will appear.
48	Double-click the **PROCLOG.TXT** file.	The file will open.
49	Make sure the process has completed successfully.	N/A

This process creates a report containing summary information and the apparent low bidder for the Letting/Proposal.

50	Click the **DONE** button.	The file will close and you will return to the **Process File List** window.
51	Close the **PROCESS FILE LIST** window.	You will return to the **Process Status List** window

You will need to delete this process from the status list now.

52	Right-click on the **process name**.	A right-click menu will appear.

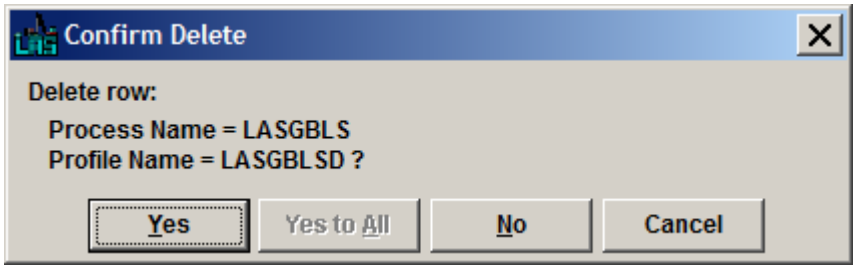


53	Select **DELETE** from the menu.	The following message will appear.

Continued on Following Page

Processes Required for Bid Analysis

(continued)



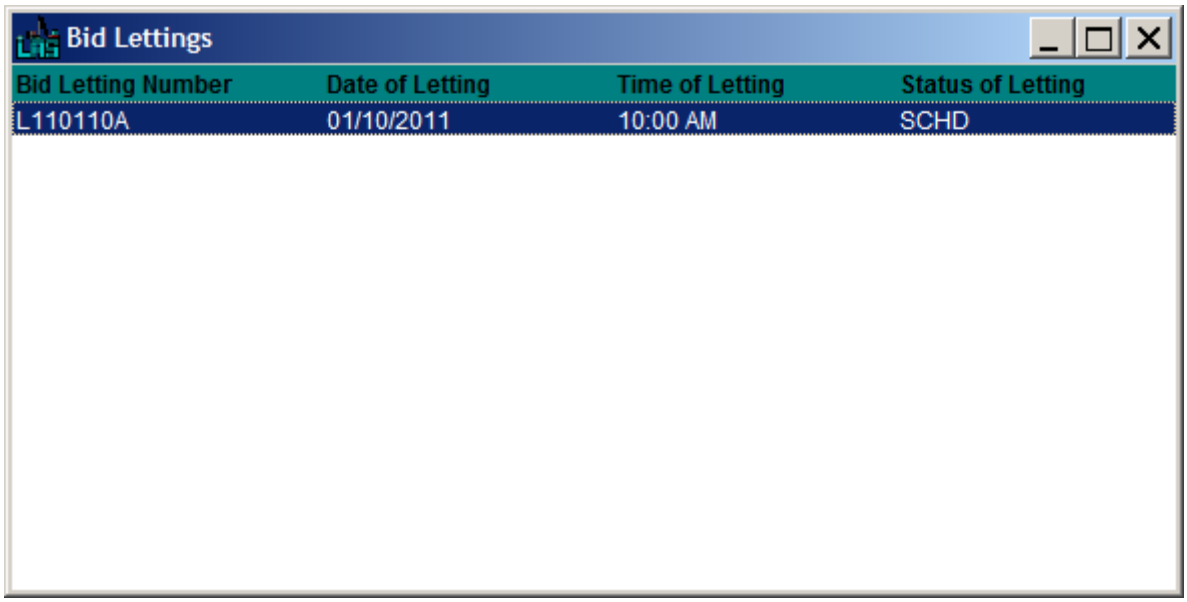
54	Click the **YES** button.	The process will be deleted from the list.
55	Close the **PROCESS STATUS LIST** window.	You will return to the **Letting/Proposals Bid Letting Package** window.
56	Close the **Letting/Proposals Bid Letting Package** window.	You will return to the **Bid Lettings** window.

Updating Contract Status

After all reports for the letting have been run and you are satisfied that they are correct, go back into Trns•port and update the status for each contract. The status should be set to **LET** and the **current date** as the status date.

Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.



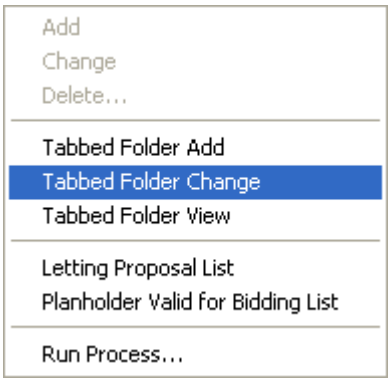
(*Bid Lettings Window*)

2	Right-click on the **bid letting** that you are currently working with.	A right-click menu will appear.

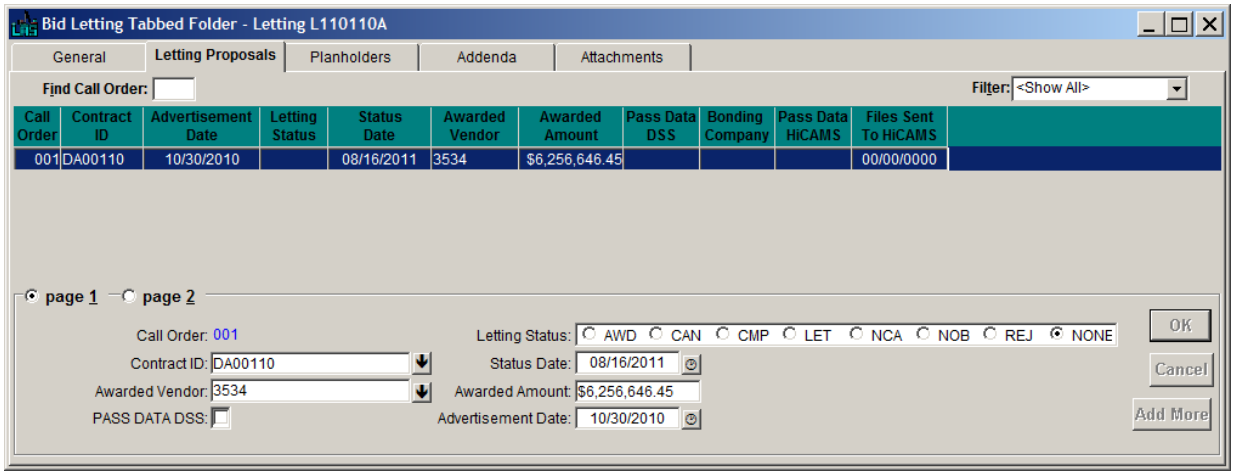
Continued on Following Page

Updating Contract Status

(continued)



3	Select **TABBED FOLDER CHANGE** from the menu.	The **Bid Letting Tabbed Folder** window will open to the **General** tab.
4	Click the **Letting Proposals** tab.	The **Letting Proposals** tab will be brought forward.



(*Letting Proposals Tab*)

5	Click on the **Contract** you need to update the status of.	Contract information will populate the bottom pane of the window.

Continued on Following Page

Updating Contract Status

(continued)

6	Click the **LET** radio button in the **LETTING STATUS** field.	N/A
7	Type the **current date** in the **STATUS DATE** field. **NOTE:** If you click the button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
8	Click the OK button.	N/A
9	Repeat steps 5-8 until you have completed your status updates.	

Once you've changed the first status to **LET**, you can highlight the **LETTING STATUS** column, right-click, select **Range Fill** then **Down** from the right-click menu to populate the entire column with the same entry. This same process can be used for the **STATUS DATE** column as well.

10	Click the **SAVE FOLDER** button.	Your changes will be saved.

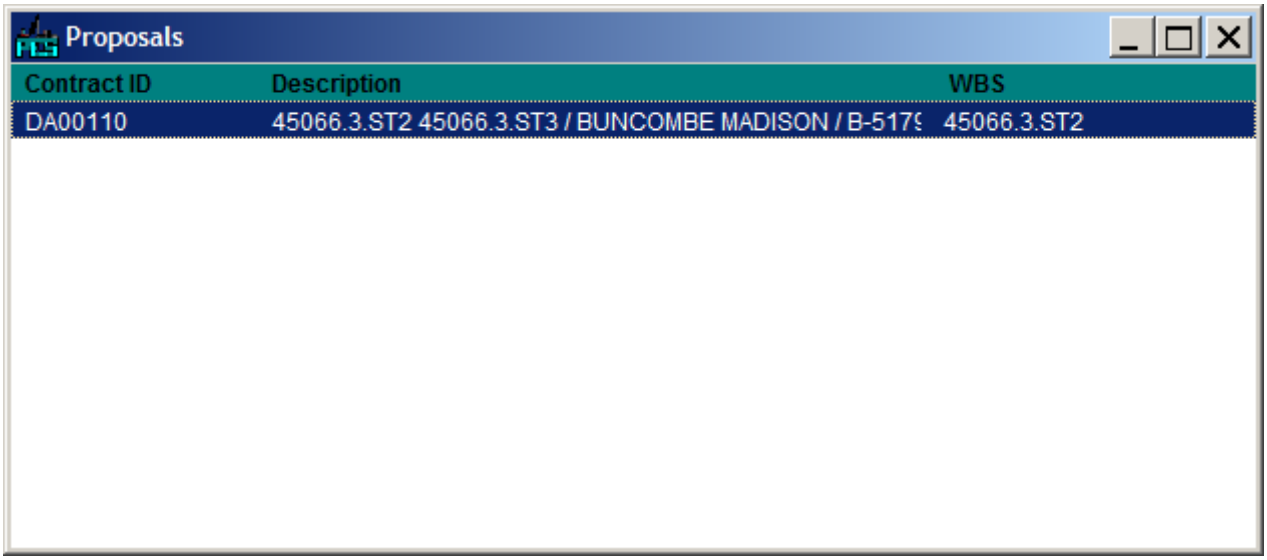
Assigning the Correct Resident Engineer

When a project/proposal was originally setup, a name had to be selected for the **RESIDENT ENGINEER** field for the system to accept all of the other information. At that time, it may not be known who would be assigned. Before the Contract can be passed to HiCams, this must be corrected.

🗁**NOTE:** If this information was known at proposal setup, this procedure can be skipped.

Once you have successfully logged into **Trns•port PES**:

Step	Action	Result
1	Click the **PROPOSALS** button.	The **Proposals** window will appear.



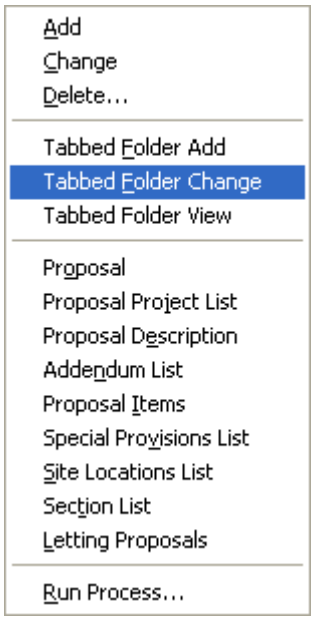
(*Proposals Window*)

2	Right-click on the **proposal number**.	A right-click menu will appear.

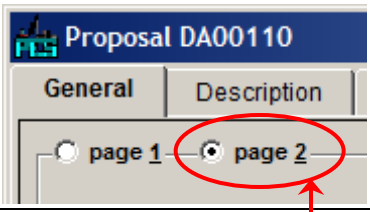
Continued on Following Page

Assigning the Correct Resident Engineer

(continued)



3	Select **Tabbed Folder Change** from the menu.	The proposal will open to the **General** tab.

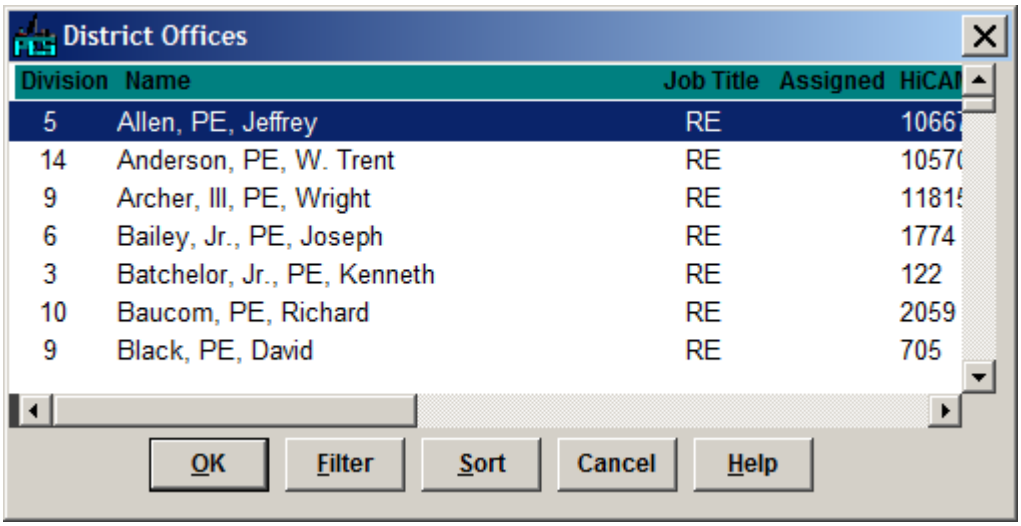


4	Click the **PAGE 2** radio button.	**Page 2** of the **General** tab will appear.
5	Click the ⬇ down-arrow button beside the **RESIDENT ENGINEER** field.	The **District Offices** dialog will appear.

Continued on Following Page

Assigning the Correct Resident Engineer

(continued)

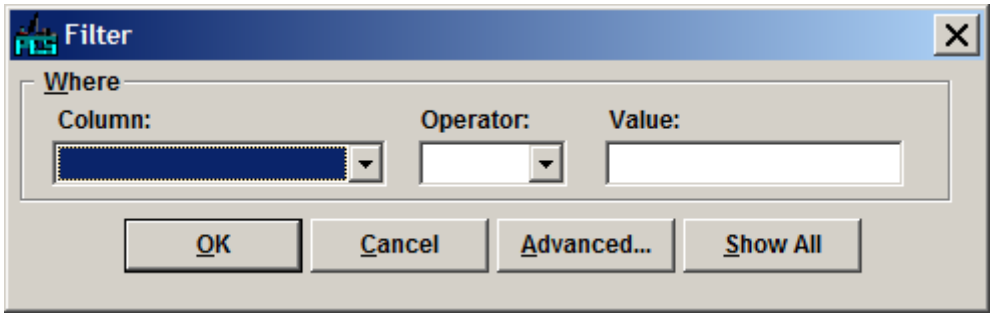


(*District Offices Dialog*)

If you'd like to create a filter that shows only **Resident Engineers**, continue. If you'd like to skip creating a filter, proceed to **Step 15**.

Creating a Filter

6	Click the **FILTER** button.	The **Filter** dialog will appear.



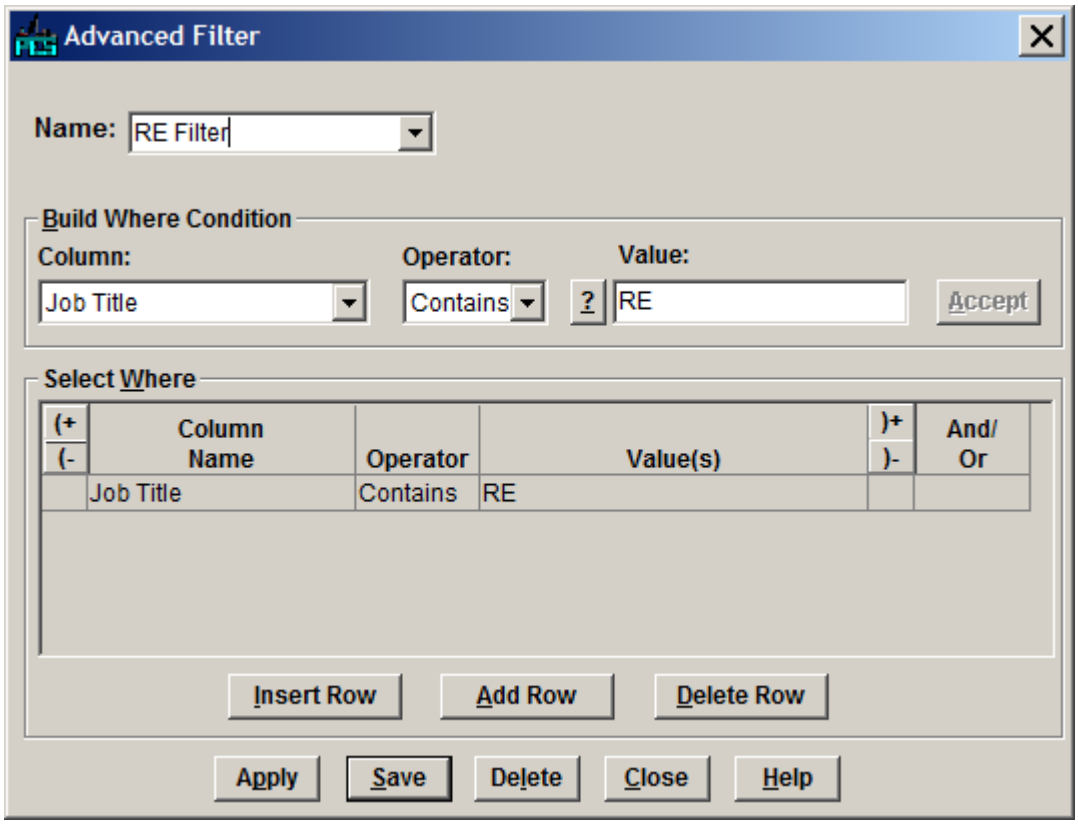
(*Filter Dialog*)

7	Click the **ADVANCED…** button.	The **Advanced Filter** dialog will appear.

Continued on Following Page

Assigning the Correct Resident Engineer

(continued)



(*Advanced Filter Dialog*)

8	Type **RE Filter** in the **NAME** field.	N/A
9	Select **Job Title** from the drop-down list in the **COLUMN** field.	N/A
10	Select **= (equals)** from the drop-down list in the **OPERATOR** field.	N/A
11	Type **RE** in the **VALUE** field.	N/A
12	Click the **ACCEPT** button	The filter criteria you specified will appear in the **SELECT WHERE** section.

Continued on Following Page

Assigning the Correct Resident Engineer

(continued)

13	Click the **SAVE** button.	Your filter will be saved.
14	Click the **APPLY** button.	The filter will be applied to the list.

This filter will only show the names of people that are identified as Resident Engineers. If you do not find the name you are looking for in this list, the person is not considered to be a Resident Engineer in this table. You can Investigate and have the code table corrected if necessary.

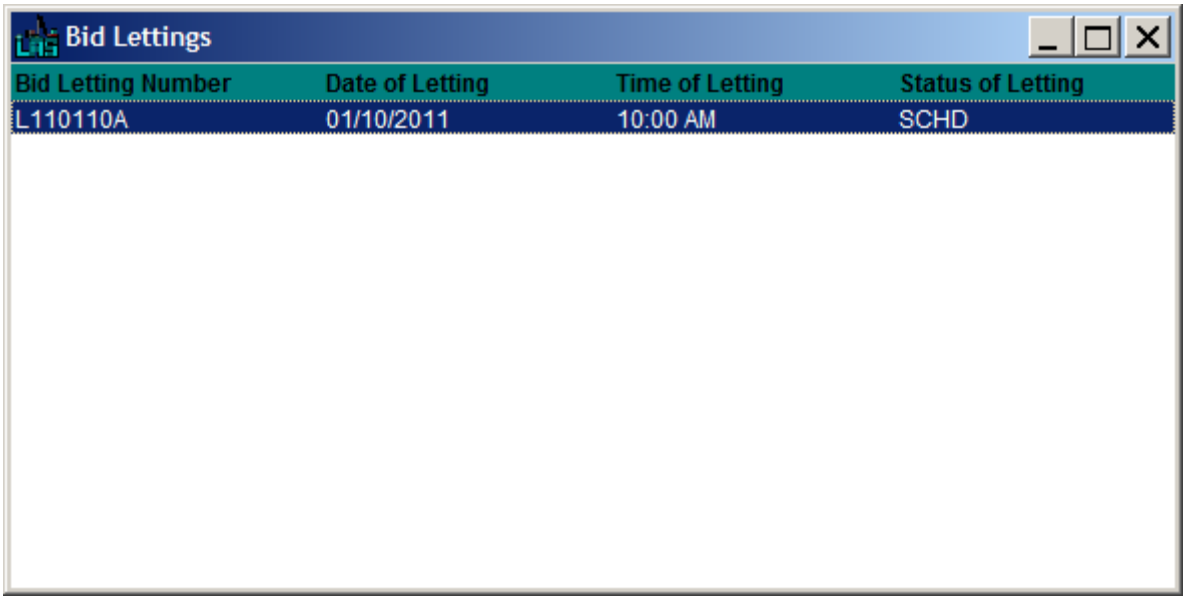
15	Scroll through the list until you find the correct **Resident Engineer**.	N/A
16	Click on the **resident engineer** to select them.	N/A
17	Click the **OK** button.	The **RESIDENT ENGINEER** field will be filled.
18	Click the **SAVE FOLDER** button.	The information will be saved

Awarding a Contract

After the Department of Transportation accepts the bid for a proposal, it must be **AWARDED** to the contracting company that submitted the bid and an Award Letter must be mailed to them.

Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.



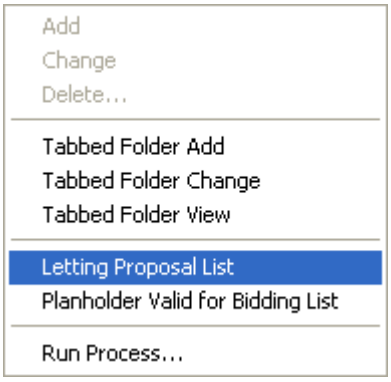
(*Bid Lettings Window*)

2	Right-click on the **bid letting** that contains the proposal you want to award the contract for.	A right-click menu will appear.

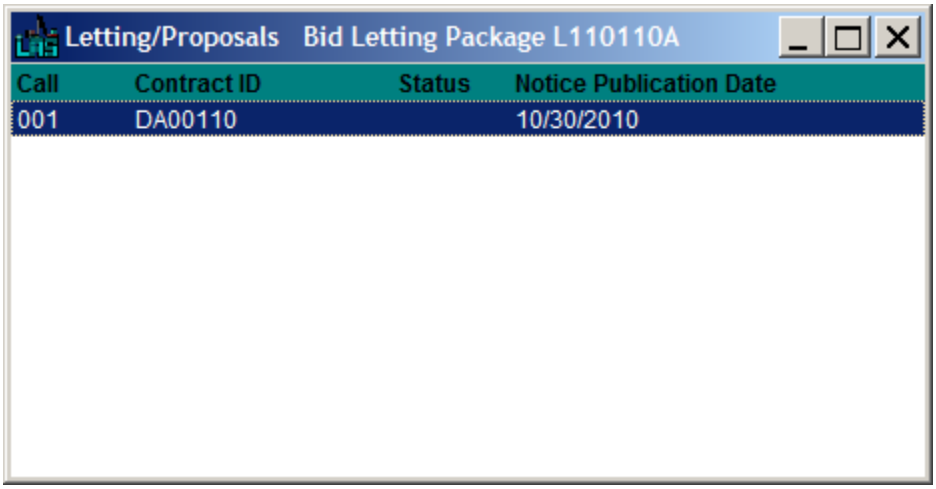
Continued on Following Page

Awarding a Contract

(continued)



3	Select **LETTING PROPOSAL LIST** from the menu.	The **Letting/Proposals Bid Letting Package** window will appear.



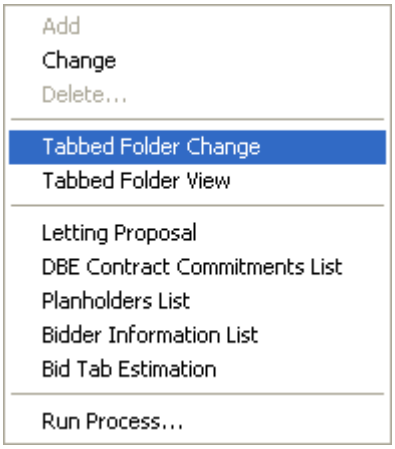
(*Letting/Proposals Bid Letting Package Window*)

4	Right-click the **proposal** you are going to award.	A right-click menu will appear.

Continued on Following Page

Awarding a Contract

(continued)

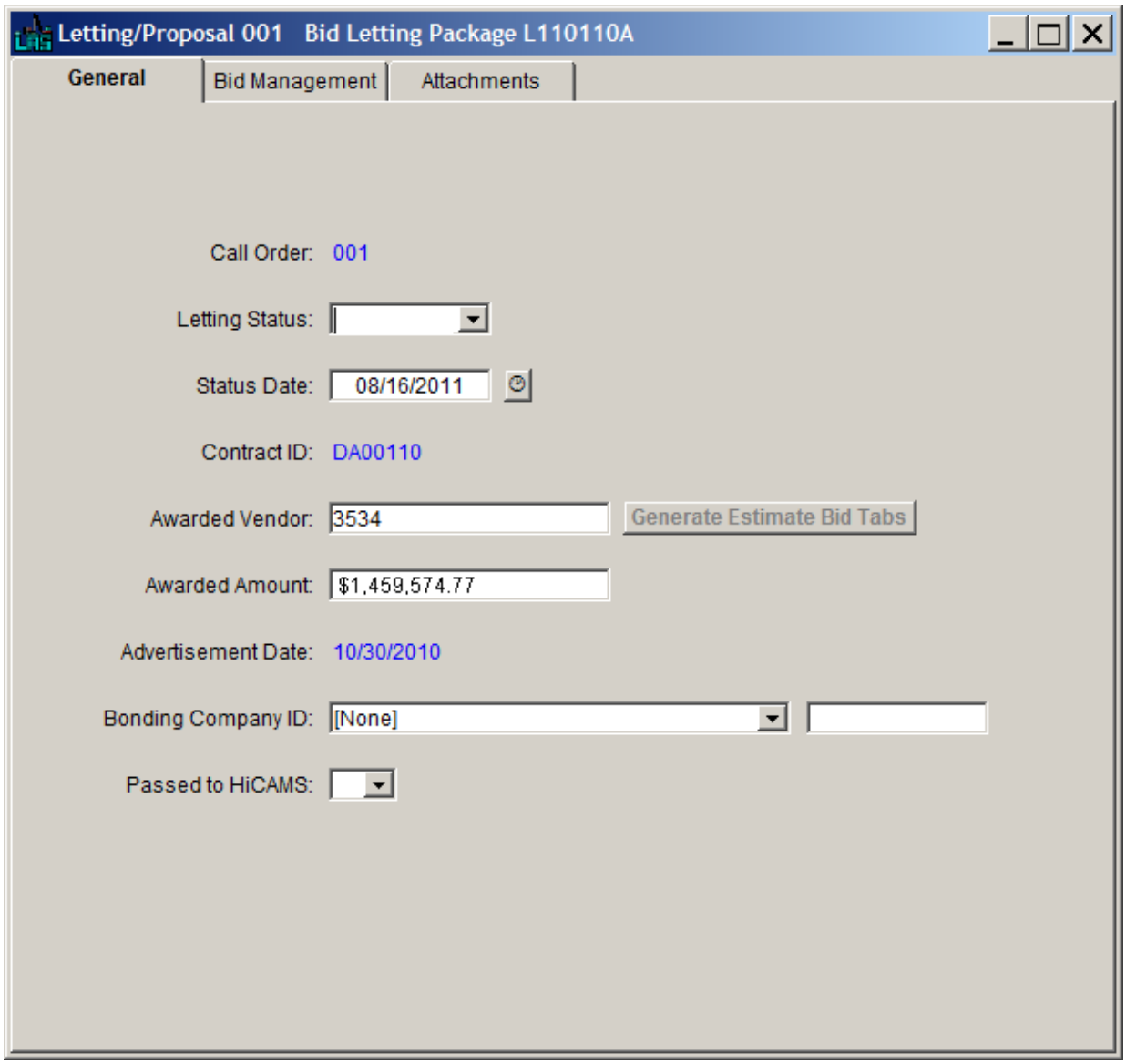


5	Select **Tabbed Folder Change** from the menu.	The **Letting Proposal - General** tab will appear.

Continued on Following Page

Awarding a Contract

(continued)



(*Letting/Proposal – General Tab*)

6	Select **AWD** from the drop-down list in the **LETTING STATUS** field.	N/A

NOTE: If your contract is part of a cluster that isn't the low side, set the status to **NCA** (Not Considered For Award).

Continued on Following Page

Awarding a Contract

(continued)

7	Type the **current date** in the **STATUS DATE** field. 🗁**NOTE:** If you click the button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
8	Click the **SAVE FOLDER** button.	The information will be saved

Repeat this process for all Contracts that are to be awarded.

🗁**NOTE:** Contracts are passed to HiCAMS after the **Letting Status** has been set to **EXEC** (Execute).

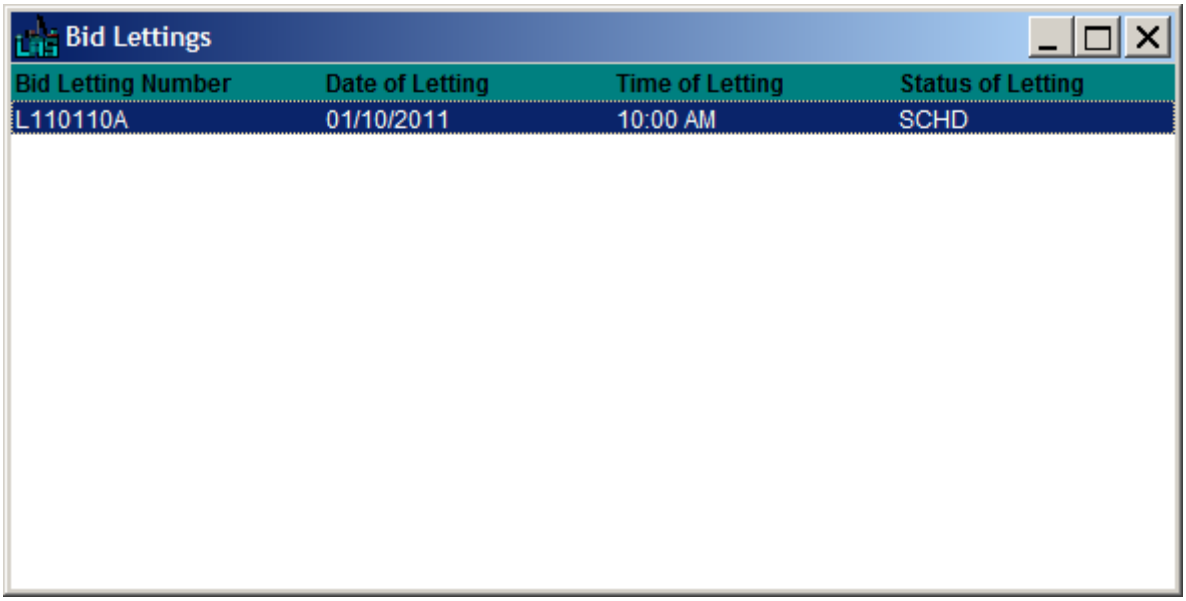
Rejecting a Contract

Occasionally, the Department of Transportation will reject a bid. When this occurs, Trns•port must be updated to show that the low bid for a proposal has been rejected.

🗁**NOTE:** Within the Trns•port system, we do not have the functionality to print Rejection Letters. This will continue to be a manual task.

Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.



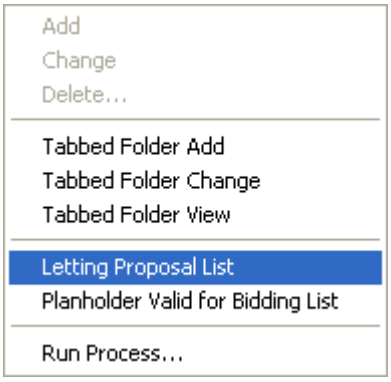
(*Bid Lettings Window*)

2	Right-click on the **bid letting** that contains the proposals you want to reject the contract of.	A right-click menu will appear.

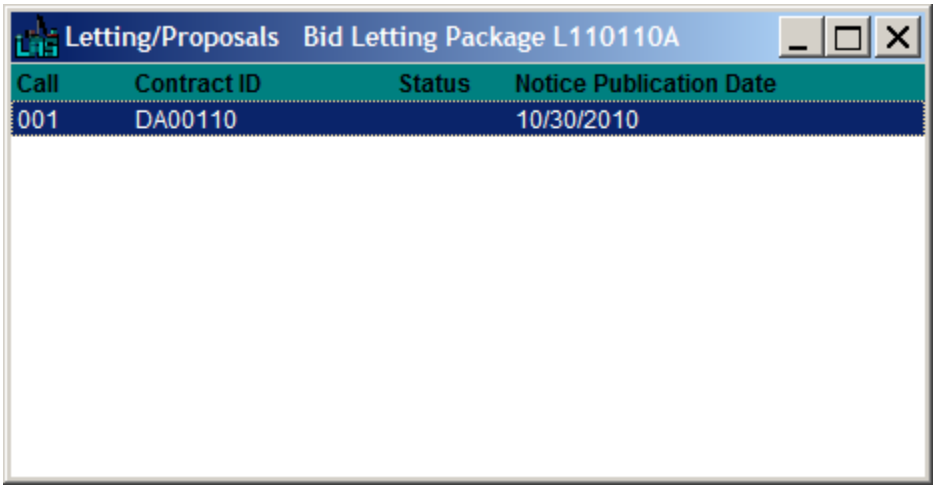
Continued on Following Page

Rejecting a Contract

(continued)



3	Select **LETTING PROPOSAL LIST** from the menu.	The **Letting/Proposals Bid Letting Package** window will appear.



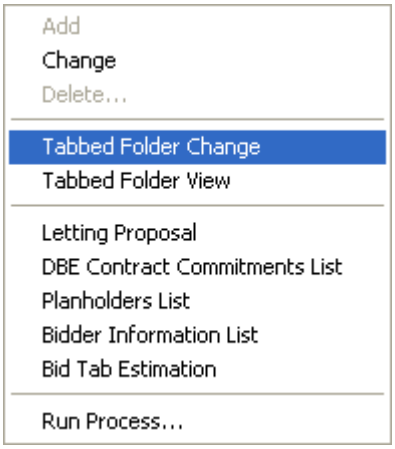
(*Letting/Proposals Bid Letting Package Window*)

4	Right-click the **proposal** you are going to reject.	A right-click menu will appear.

Continued on Following Page

Rejecting a Contract

(continued)

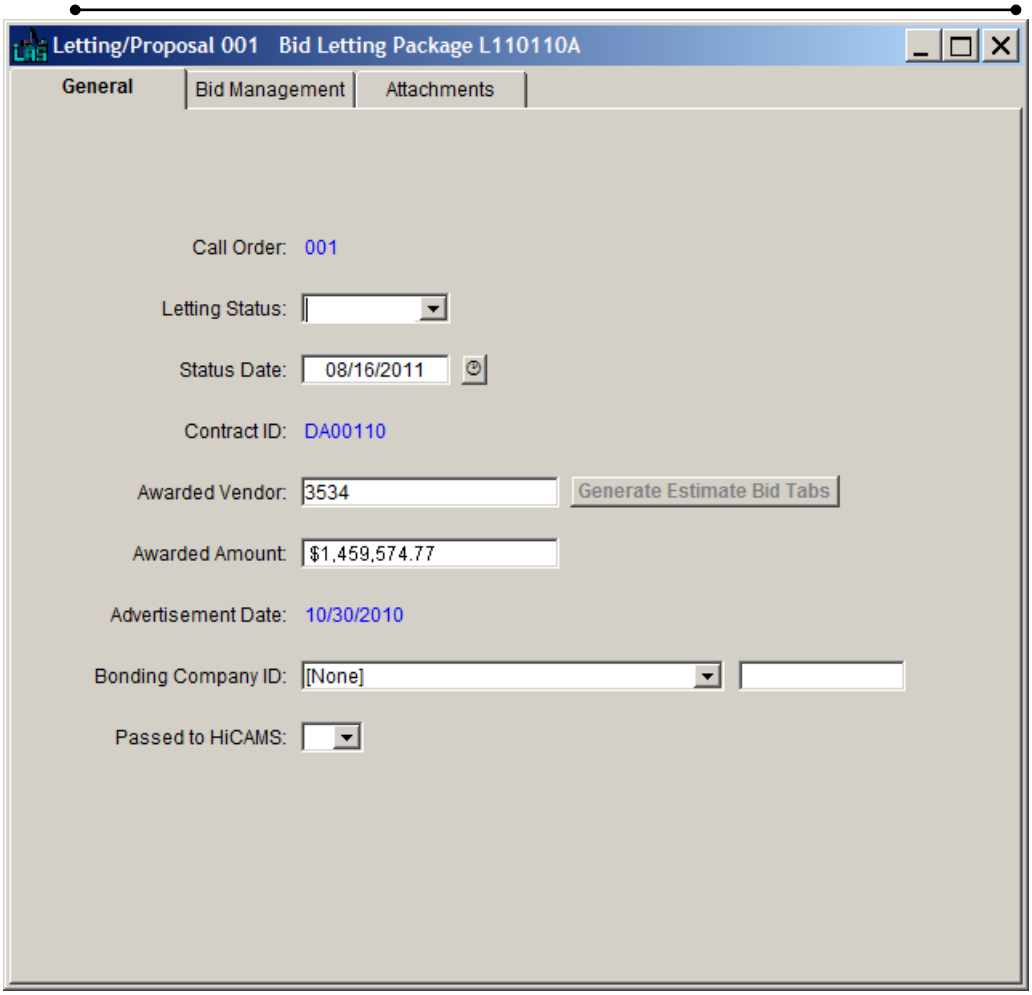


5	Select **Tabbed Folder Change** from the menu.	The **Letting Proposal - General** tab will appear.

Continued on Following Page

Rejecting a Contract

(continued)



(*Letting/Proposal – General Tab*)

6	Select **REJ** from the drop-down list in the **LETTING STATUS** field.	N/A
7	Type the **current date** in the **STATUS DATE** field. 🗁**NOTE:** If you click the button, a popup calendar will allow you to select the date so that it appears in the field.	N/A

Continued on Following Page

Rejecting a Contract

(continued)

8	Click the **SAVE FOLDER** button.	The information will be saved

Repeat this process for all Contracts that are to be rejected.

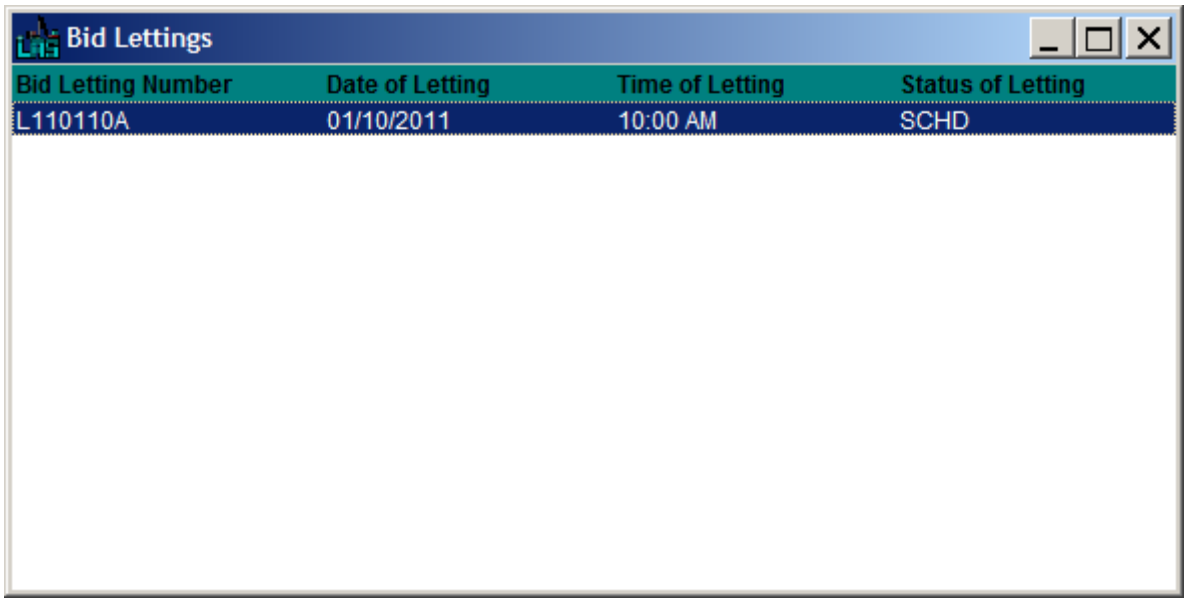
Executing a Contract

After a contract has been **Awarded**, the contracting company that submitted the winning bid must submit proper bonding company information back to NCDOT. When this information is received, the contract must then be **Executed**. This requires a change in the status of the contract in Trns•port to **Executed**.

Upon completion, information on the contract will be passed overnight to HiCAMS.

Once you have successfully logged into **Trns•port LAS**:

Step	Action	Result
1	Click the **BID LETTINGS** button.	The **Bid Lettings** window will appear.



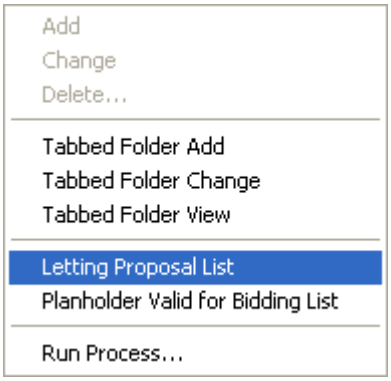
(*Bid Lettings Window*)

2	Right-click on the **bid letting** that contains the proposals you want to execute the contract of.	A right-click menu will appear.

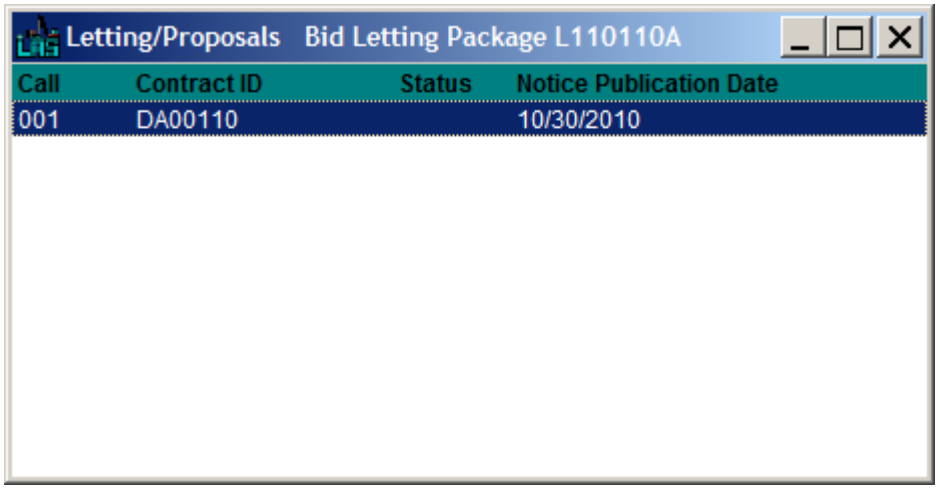
Continued on Following Page

Executing a Contract

(continued)



3	Select **LETTING PROPOSAL LIST** from the menu.	The **Letting/Proposals Bid Letting Package** window will appear.



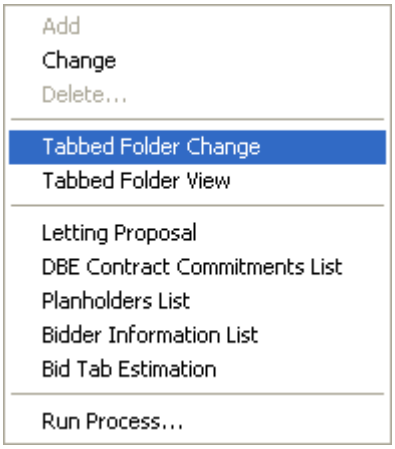
(*Letting/Proposals Bid Letting Package Window*)

4	Right-click the **proposal** you are going to execute.	A right-click menu will appear.

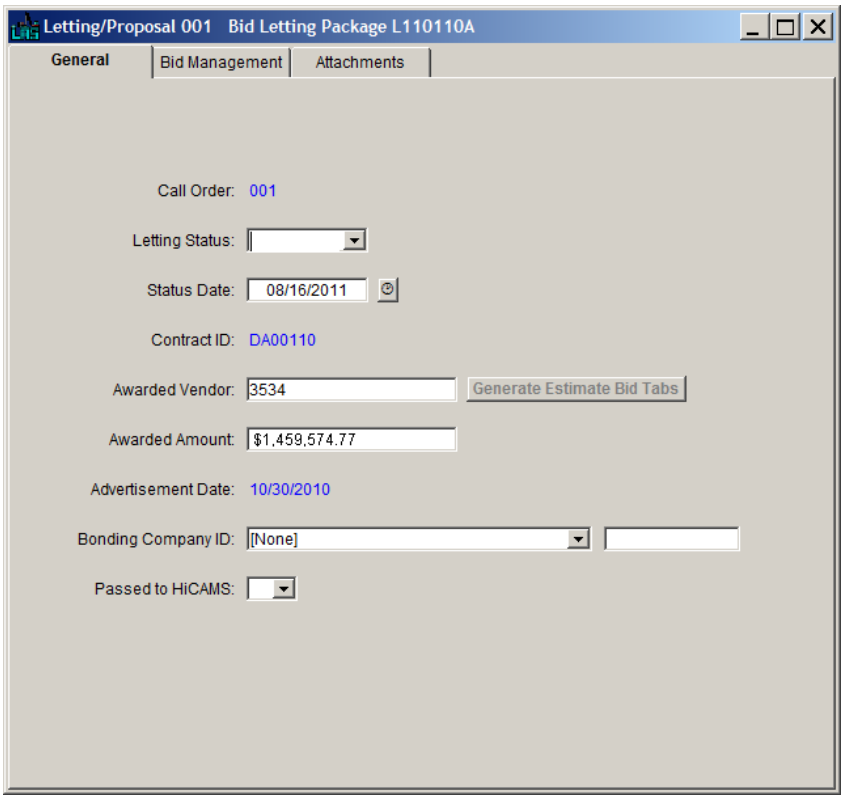
Continued on Following Page

Executing a Contract

(continued)



5	Select **Tabbed Folder Change** from the menu.	The **Letting Proposal - General** tab will appear.



(*Letting/Proposal – General Tab*)

Continued on Following Page

Executing a Contract

(continued)

6	Select **EXEC** from the drop-down list in the **LETTING STATUS** field.	N/A
7	Type the **current date** in the **STATUS DATE** field. 🗁**NOTE:** If you click the button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
8	Select the **bonding company** from the drop-down list in the **BONDING COMPANY** field. 🗁**NOTE:** You can type the first part of the name to parse the list.	N/A
9	Click the **SAVE FOLDER** button.	The information will be saved

DO NOT SAVE UNTIL YOU HAVE COMPLETELY FINISHED ENTERING THIS INFORMATION.
Once you save, Trns•port thinks you have completed entering your information and sends what you have entered to HiCAMS.

If you have not entered all of your information, you will have to repeat this process the next day because HiCAMS will not have received all the information that is required.

Continued on Following Page

Executing a Contract

(continued)

Contract Re-Execution

In order to re-execute, you must go to the **LAS Letting/Proposal General** tab. This has been implemented in an effort to reduce duplicates being sent to HiCAMS.

If you manually change any field (excluding clicking on the clock for the date field) without tabbing to the next available field, then try to save the information, the data will not be saved.

To re-execute:

1. Change the status from **EXEC** to **LET** and **SAVE**.
2. Then change the status back to **EXEC** and **SAVE**.

You will then receive a message to change the **PASSED TO HICAMS** field to **H**.

3. Change the value in the **PASSED TO HICAMS** field to **H** and **SAVE**.
4. To verify, close the **Letting/Proposal** and re-open it (Tabbed Folder Change)

The **FILES GENERATED** timestamp will have changed.

When You Are Finished…

IMPORTANT!

When you have executed all projects for a particular **Bid Letting**, you **MUST** notify Penny Higgins or Jaci Kincaid at (919)707-6900 that this work has been done and the **Status** of the Letting should be changed to **Completed.** This will be your final task for this particular letting.

Appendix A Glossary

Alternate Line Items	Multiple line items specified in proposal items sheets that require the contractors to make a choice of materials.
Breakdowns	Used in defining the various ways in which project costs may be summarized. This is a category in Trns•port.
Contractor	Any business entity who may receive proposals and plans for projects advertised by the contracts office.
Engineer's Estimate	A summary report showing estimated cost for each project in a letting.
Federal Aid Number	An identifier used by Federal Aid Administration to track federal funding associated with a specific project.
Force Account Items	Force account items represent costs of items in a project that will be performed by a third party, such as a railroad contractor of state forces on Federal Aid Projects. These items are not included in the contract and any associated costs are directly reimbursed to the third party by the state.
Generic Items	Non-standard items that provide flexibility in identifying an item selected by type of work and unit of measure.
Line Items	Pay items associated with a project.
Lump Sum Quantity Items	Pay items that have been classified as lump sum items for bidding in the master pay item list, but for which quantities estimators may specify quantities to assist in the cost estimation process.
Master Pay Item List	A listing of all standard pay items, specifying a description code for each item.
Non-Participating Agency	Any entity excluding NC DOT sharing in the total cost of a project.
Non-Participating Costs	Portion of line item cost assigned to a non-participating agency.
Pay Item	A master pay item is a single, identifiable unit that includes all materials and services necessary to install that item. Synonymous with "contract item."
Division Project	The specific section of the highway together with all appurtenances and construction to be performed thereon under the contract.

Division Proposal	The form provided by the Department of Transportation on which the offer of the bidder to perform the work at designated bid prices is submitted.
Trns•port Project	Represents costs associated with all or part of a construction project.
Trns•port Proposal	The entities presented to potential contractors for bidding. You construct a proposal from Trns•port projects. Typically, you combine multiple projects into a single proposal. Proposal information generally includes contract time specifications, DBE/WBE goals, bonding information, a detailed description of the work the contractor will perform, and an identification of any necessary special provisions, supplemental specifications, or both.
WBS Number	Identifier used by the fiscal section of the Department of Transportation to track funds.

Appendix B Supplemental Descriptions

Below is the format for entering supplemental descriptions. This is to be used as a consistency reference for entering supplemental descriptions.

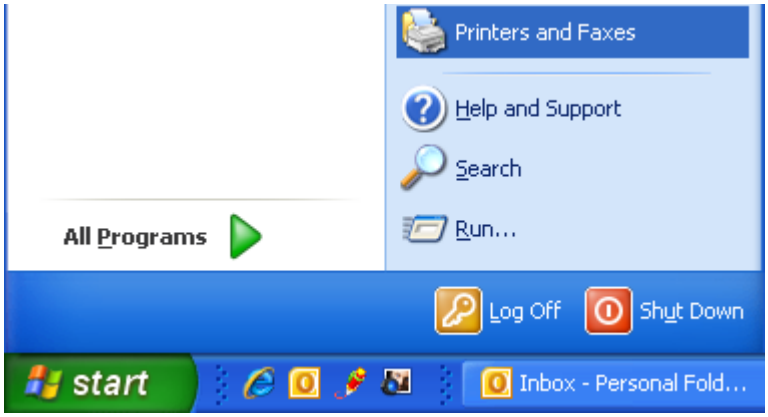
PAY ITEM DESCRIPTION	SUPPLEMENTAL DESCRIPTION EXAMPLE
REINFORCED BRIDGE APPROACH FILL, STATION **********	(327+38.34)
**" PLAIN CONC PIPE CULVERTS	(15")
***MM PLAIN CONC PIPE CULVERTS	(350MM)
" RC PIPE CULVERTS, CLASS **	(15", IV)
****MM RC PIPE CULVERTS, CLASS ***	(350MM, IV)
**" X **" X **" RC PIPE TEES, CLASS III	(12" X 12" X 12")
*** X *** X ***MM RC PIPE TEES CLASS III	(350MM X 350MM X 350MM)
"X **"X **" CS PIPE TEES, ***" THICK	(12" X 12" X 12", 0.064")
*** X *** X ***MM CS PIPE TEES ****MM THICK	(350MM X 350MM X 350MM, 1.63MM)
MILLING ASPHALT PAVEMENT, ***"DEPTH	(1-1/2")
MILLING ASPHALT PAVEMENT, **MMDEPTH	(55MM)
MILLING ASPHALT PAVEMENT, ***"TO ******" DEPTH	(0" TO 1-1/2")
MILLING ASPHALT PAVEMENT, *** TO ***MM DEPTH	(0MM TO 55MM)
FRAME WITH GRATE, DETAIL 840.*****	(840.29)
FRAME WITH GRATE & HOOD, STD 840.03, TYPE **	(E)
**"X **" CONCRETE CURB	(8" X 12")
*** X ***MM CONCRETE CURB	(200MM X 450MM)
GENERIC PAVING ITEM	ULTRATHIN HOT MIX ASPHALT
GUARDRAIL ANCHOR UNITS, TYPE **********	(M-350)
OVERHEAD SIGN ASSEMBLY **	(A)
FOUNDATION CONDITIONING MATERIAL, UTILITIES CLASS ********	(III)
" DI WATER PIPE, CLASS ********	(12", IV)
"X"X**" PERFORATED CS PIPETEE RISER, 0.064"THICK	(18" X 18" X 18")
XX***MM PERFORATED CS PIPE TEE RISER, 1.63MM THICK	(450MM X 450MM X 450MM)
PEDESTRIAN SIGNAL HEAD (**", ** SECTION)	(12", 3)
PEDESTRIAN SIGNAL HEAD (***MM,** SECTION)	(450MM, 3)
PREFORMED INDUCTIVE LOOP (**'X**') WITH *'TAIL SECTION	(6' X 30', 5')
PREFORMED LOOP (***M X ***M) WITH ***M TAIL SECTION	(15M X 7.5M, 12M)

PAY ITEM DESCRIPTION	SUPPLEMENTAL DESCRIPTION EXAMPLE
COMMUNICATIONS CABLE (**FIBER)	(3)
REMOVAL OF EXISTING STRUCTURE AT STATION **********	(27+38.234-L-)
FOUNDATION EXCAVATION FOR END BENT ** AT STATION **********	(2, 27+38.234-L-)

Appendix C Reports

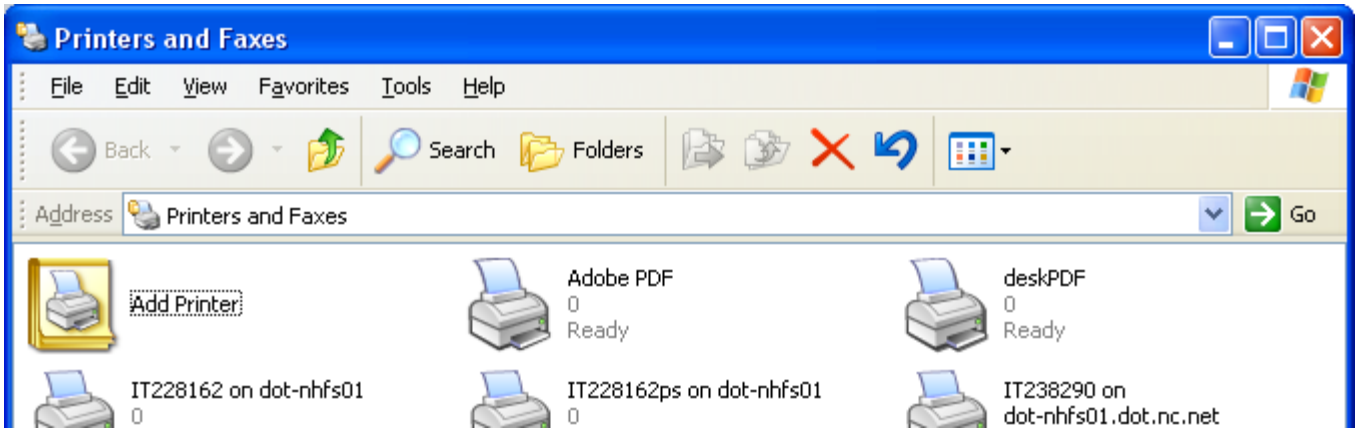
Setting deskPDF as The Default Printer

In order to save and print any reports you generate as PDFs, you will first need to set deskPDF as your Default Printer.



(*Windows™ Start Menu*)

Step	Action	Result
1	Click the **WINDOWS START MENU** button.	The **Windows Start Menu** will expand.
2	Select **Printers and Faxes** from the menu.	The **Printers and Faxes** window will appear.



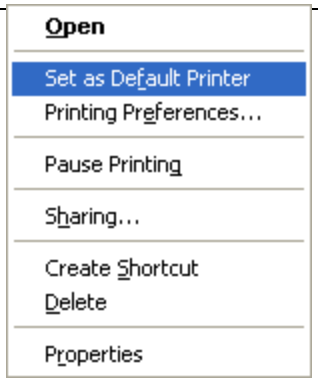
(*Printers and Faxes Window*)

Continued on Following Page

Setting deskPDF as The Default Printer

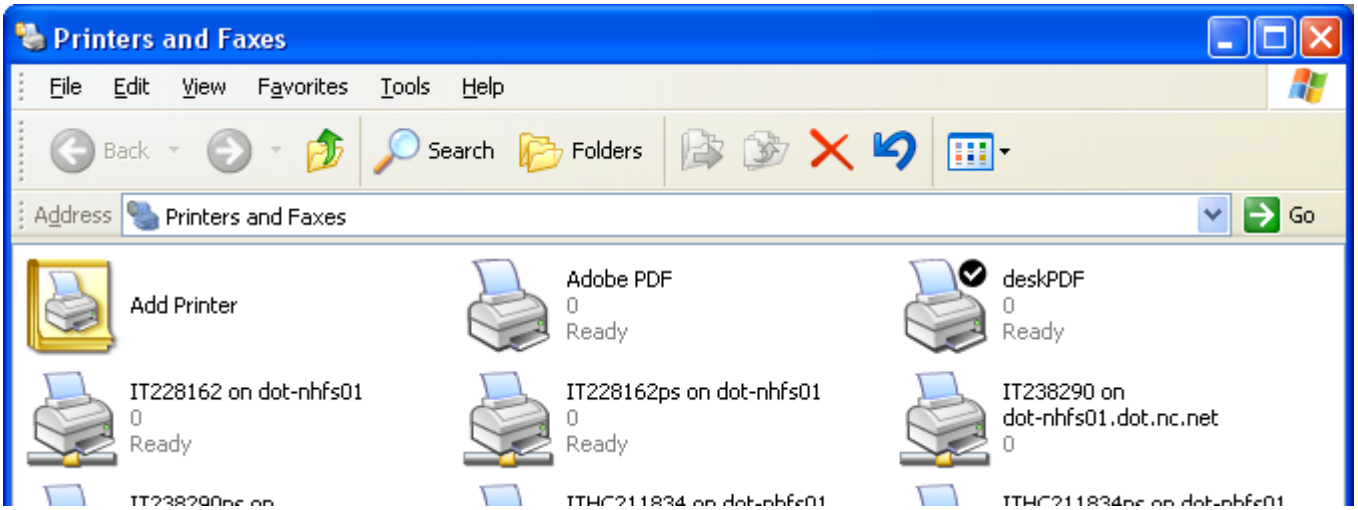
(continued)

3	Right-click on the **deskPDF** printer icon.	A right-click menu will appear



(*Right-Click Menu*)

4	Select **Set as Default Printer** from the menu.	**deskPDF** is now the default printer.



(*Printers and Faxes Window*)

Now all reports in the Trns•port PES or LAS applications can be saved as PDF files using the deskPDF utility.

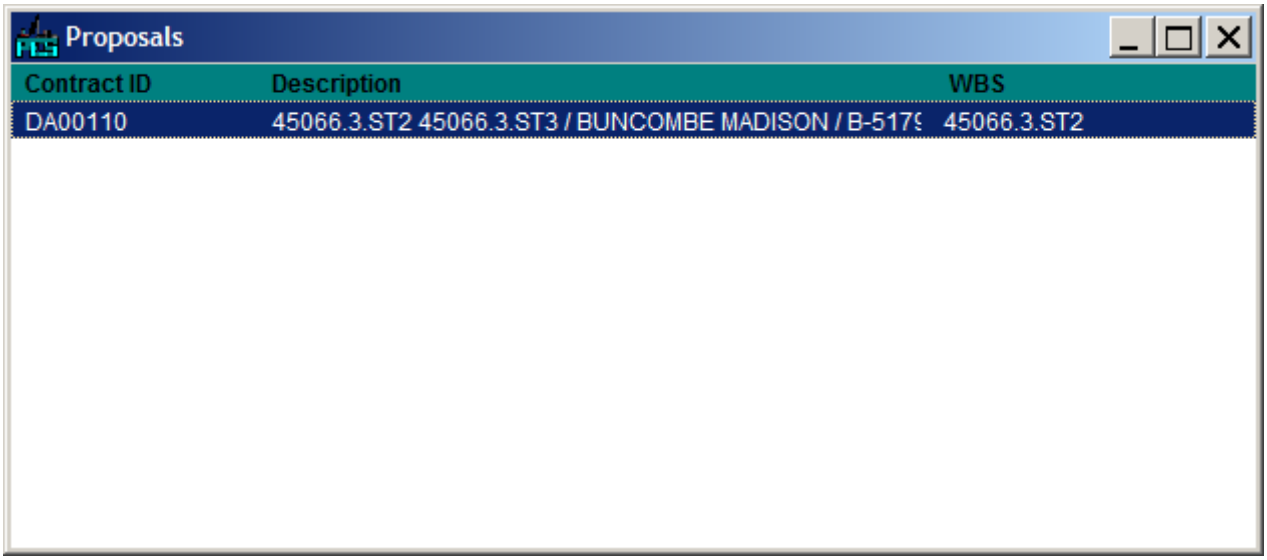
🗁**NOTE:** In order to print the files, you will need to first save them with deskPDF. Then, once you have exited Citrix, reset your default printer. Open each PDF and print it as needed.

Custom Reports

You will be able to run several reports from the Trns•port System. These reports can be produced at the proposal and letting levels.

Once you have successfully logged into **Trns•port PES**:

Step	Action	Result
1	Click the **PROPOSALS** button.	The **Proposals** window will appear.



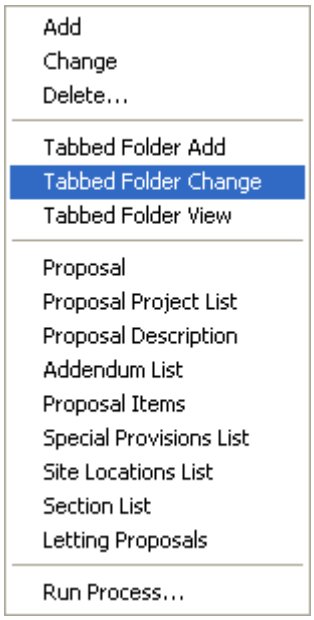
(*Proposals Window*)

Continued on Following Page

Custom Reports

(continued)

2	Right-click on the **proposal number**.	A right-click menu will appear.

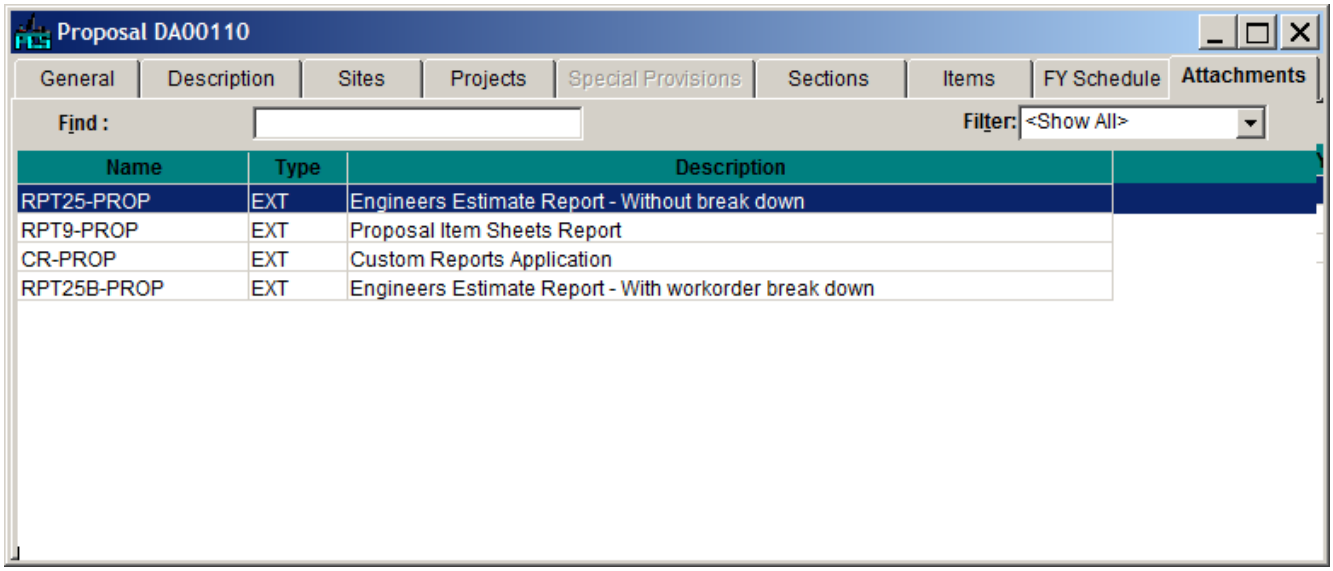


3	Select **TABBED FOLDER CHANGE** from the menu.	The proposal will open to the **General** tab.
4	Click on the **ATTACHMENTS** tab.	The **Attachments** tab will be brought forward.

Continued on Following Page

Custom Reports

(continued)



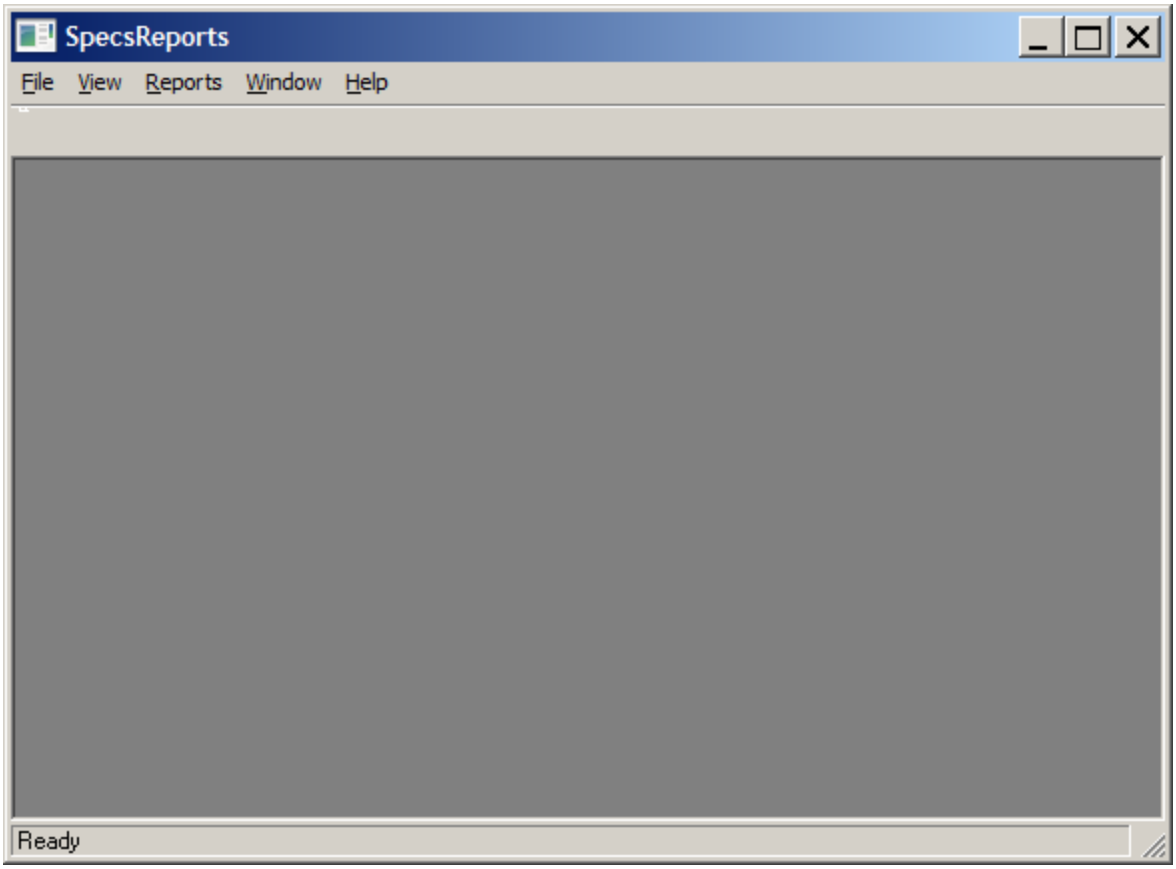
(*Attachments Tab*)

5	Double-click **CUSTOM REPORTS APPLICATION**.	The **SpecsReports** window will appear.

Continued on Following Page

Custom Reports

(continued)



(*SpecsReports Window*)

At this time, you will be able to run 6 reports from this window.

These reports are:

- Proposal Item Sheets (For a Proposal or Letting)
- Advertisement
- Engineer's Estimate (With or without breakdown)
- Project Summary
- Estimate vs. Low Bidder.
- Bid Tabulations

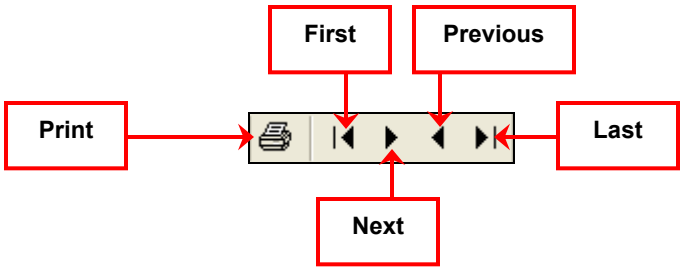
NOTE: In the future, as reports become available, they will be added here.

Continued on Following Page

Custom Reports

(continued)

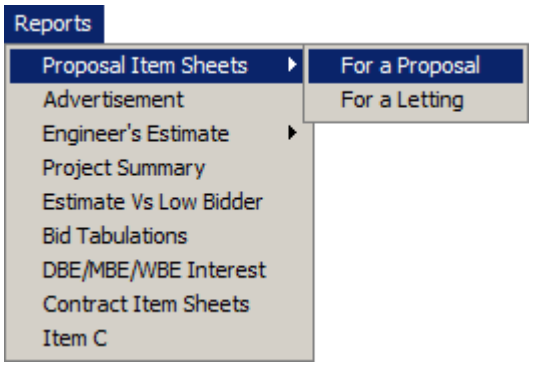
The following toolbar will appear at the top of each report.



You will use the **PRINT** button to export reports as **PDF** files using **deskPDF**. For instructions on how to do this, see **Setting deskPDF as The Default Printer** on page **C-1**.

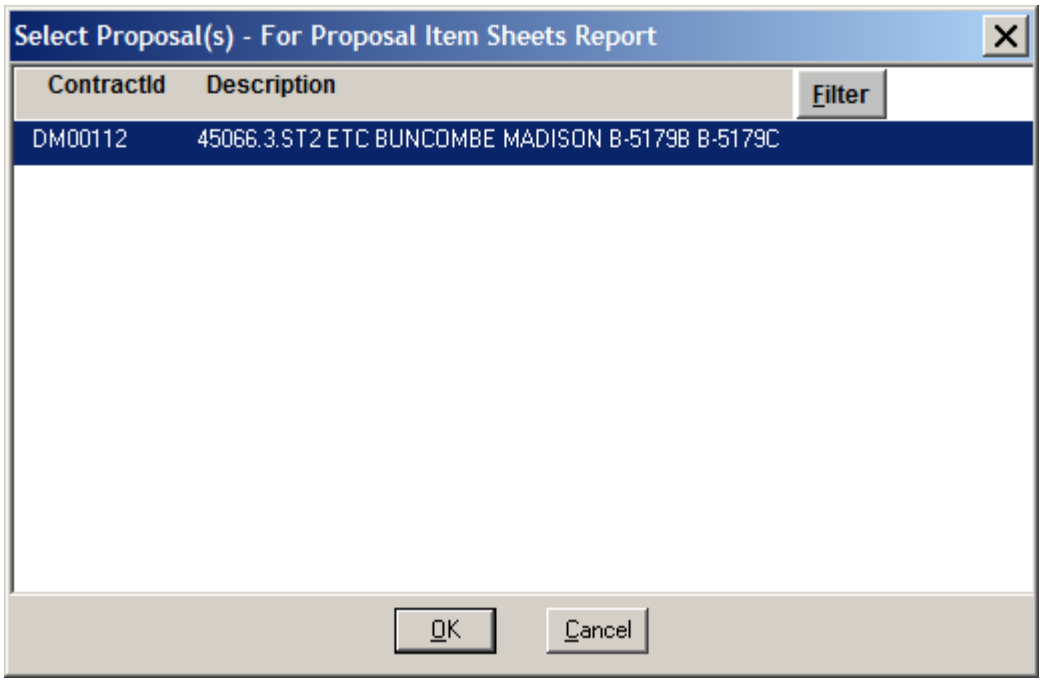
Proposal Item Sheets (For a Proposal)

The **Proposal Item Sheets (For a Proposal)** report lists the items and quantities and is used in the bidding document. This option allows you to print all **Proposal Item Sheets** for an individual **Proposal**.



From the **SpecsReports** window.

Step	Action	Result
1	From the **REPORTS** drop-down menu, select **Proposal Item Sheets**, then select **For a Proposal**.	The **Select Proposal(s)** window will appear.



(*Select Proposal(s) – For Proposal Item Sheets Report Window*)

Continued on Following Page

Proposal Item Sheets (For a Proposal)

(continued)

2	Click on the **proposal** to select it.	N/A

NOTE: You can click the **FILTER** button to narrow the list. See **Finding the Project Estimate Template** on page **2-32** for detailed instructions on how to use the filter.

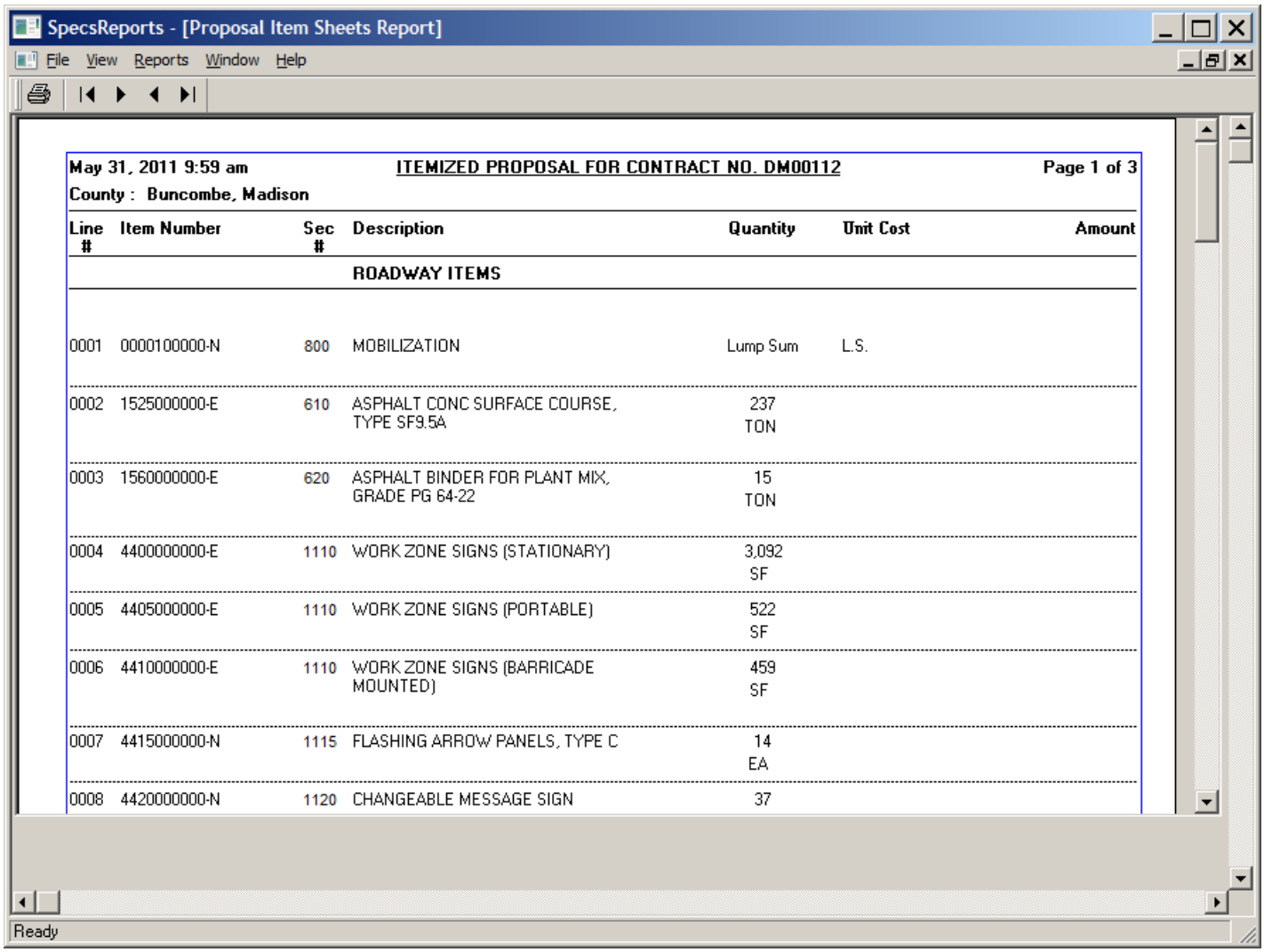
If you would like to select multiple proposals at the same time, hold down the Ctrl key and click each proposal you wish to select.

3	Click the OK button.	The **Proposal Item Sheets Report** will appear.

Continued on Following Page

Proposal Item Sheets (For a Proposal)

(continued)



May 31, 2011 9:59 am ITEMIZED PROPOSAL FOR CONTRACT NO. DM00112 Page 1 of 3

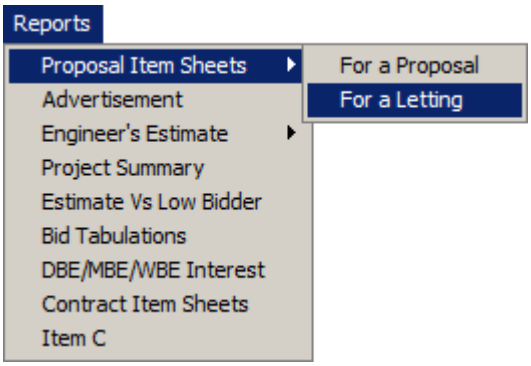
County : Buncombe, Madison

Line #	Item Number	Sec #	Description	Quantity	Unit Cost	Amount
			ROADWAY ITEMS			
0001	0000100000-N	800	MOBILIZATION	Lump Sum	L.S.	
0002	1525000000-E	610	ASPHALT CONC SURFACE COURSE, TYPE SF9.5A	237 TON		
0003	1560000000-E	620	ASPHALT BINDER FOR PLANT MIX, GRADE PG 64-22	15 TON		
0004	4400000000-E	1110	WORK ZONE SIGNS (STATIONARY)	3,092 SF		
0005	4405000000-E	1110	WORK ZONE SIGNS (PORTABLE)	522 SF		
0006	4410000000-E	1110	WORK ZONE SIGNS (BARRICADE MOUNTED)	459 SF		
0007	4415000000-N	1115	FLASHING ARROW PANELS, TYPE C	14 EA		
0008	4420000000-N	1120	CHANGEABLE MESSAGE SIGN	37		

(*Proposal Item Sheets Report – For a Proposal Window*)

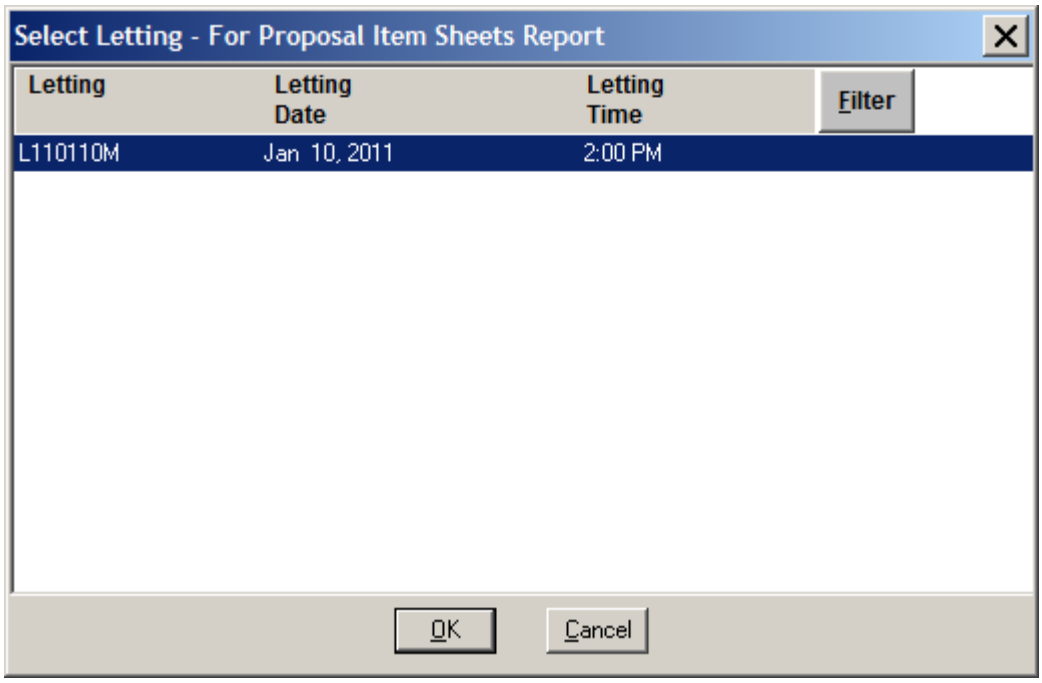
Proposal Item Sheets (For a Letting)

The **Proposal Item Sheets (For a Letting)** report lists the items and quantities and is used in the bidding document. This option allows you to print all **Proposal Item Sheets** for a **Letting** at one time.



From the **SpecsReports** window.

Step	Action	Result
1	From the **REPORTS** drop-down menu, select **Proposal Item Sheets**, then select **For a Letting**	The **Select Letting** window will appear.



(*Select Letting - For Proposal Item Sheets Report Window*)

Continued on Following Page

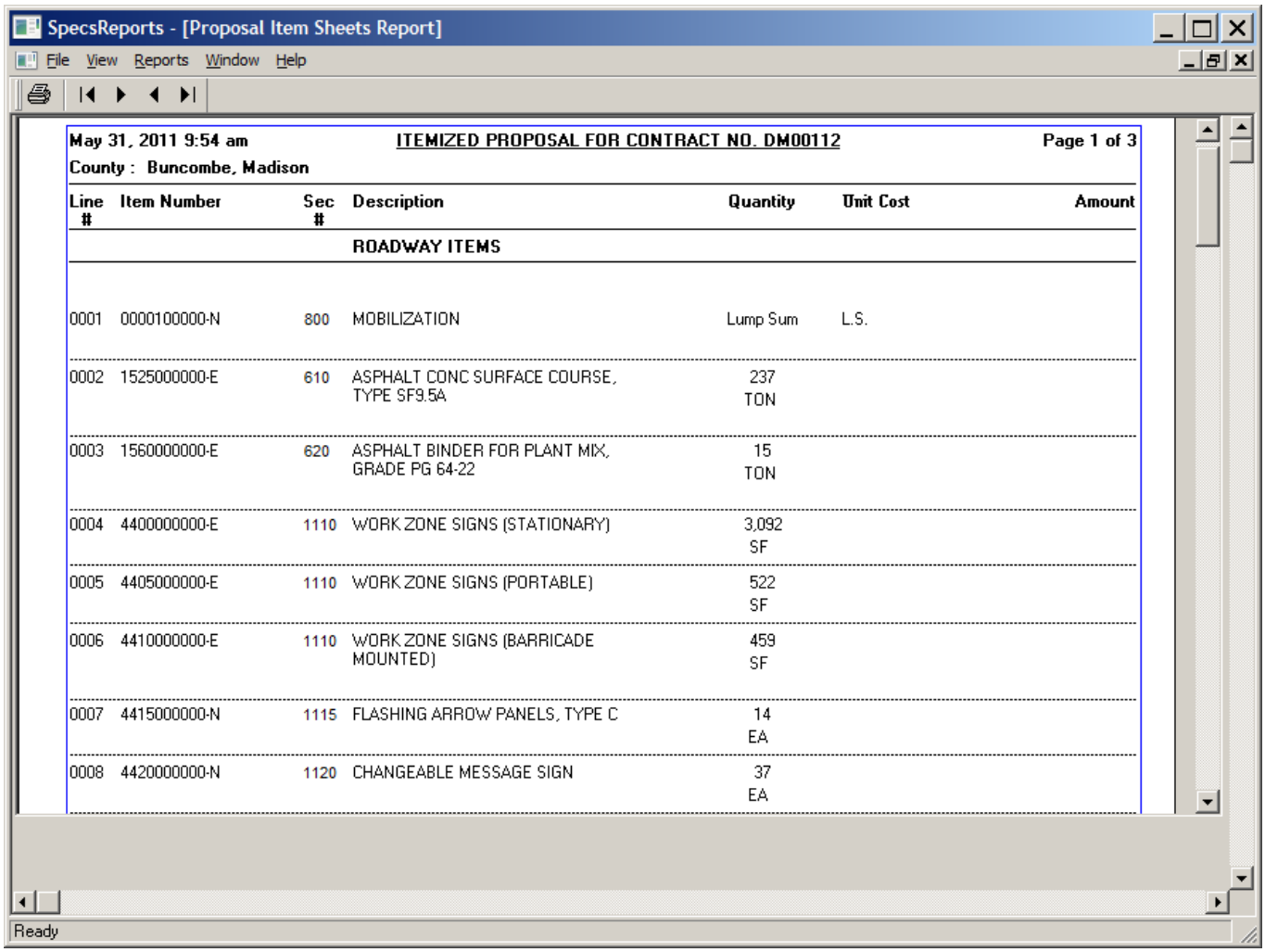
Proposal Item Sheets (For a Letting)

(continued)

2	Click on the **letting** to select it.	N/A

NOTE: You can click the **FILTER** button to narrow the list. See **Finding the Project Estimate Template** on page **2-32** for detailed instructions on how to use the filter.

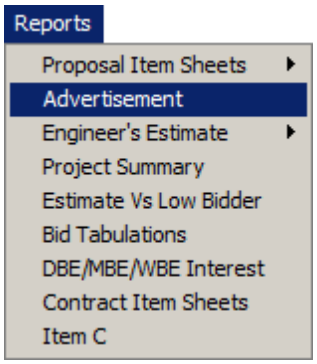
3	Click the [OK] button.	The **Proposal Item Sheets Report** will appear.



(*Proposal Item Sheets Report – For a Letting Window*)

Advertisement

The **Advertisement** lists items and quantities for all **Proposals** in a **Letting** in a compact form. This report was originally written for the Central Office advertisements and includes a listing of Division Engineers. This listing will need to be removed when the report is used by a Division Office.



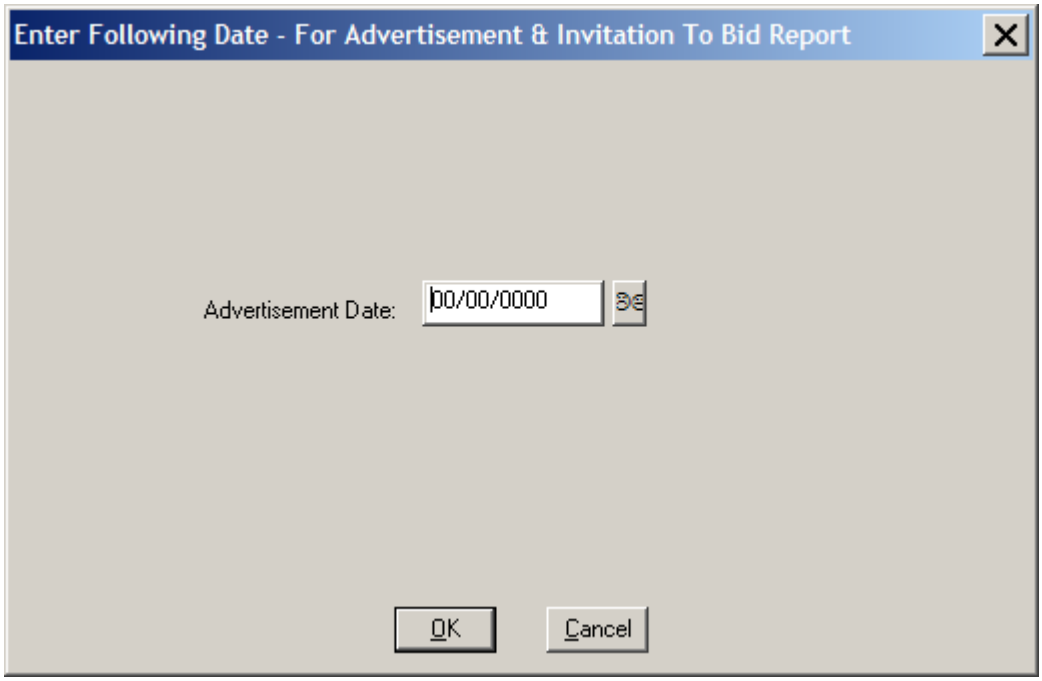
From the **SpecsReports** window.

Step	Action	Result
1	From the **REPORTS** drop-down menu, select **Advertisement**.	The **Enter Following Date - For Advertisement & Invitation to Bid Report** window will appear.

Continued on Following Page

Advertisement

(continued)



(*Enter Following Date – For Advertisement & Invitation To Bid Report Window*)

2	Click the button.	A calendar will appear.

3	Select the **advertisement date** from the calendar.	N/A
4	Click the OK button.	The **Advertisement & Invitation to Bid Report** will appear.

Continued on Following Page

Advertisement

(continued)

SpecsReports

File View Reports Window Help

Advertisement & Invitation To Bid Report

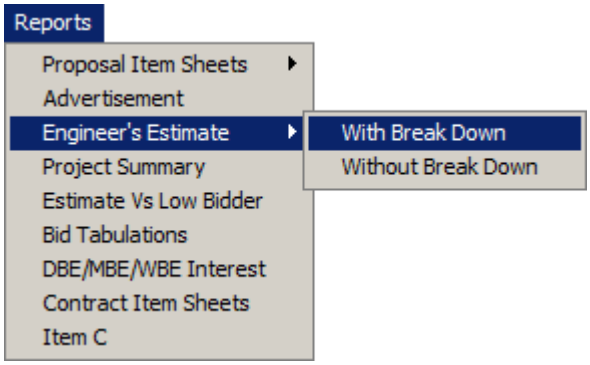
DIV NO.	DIVISION ENGINEER	LOCATION	TOWN	TELEPHONE
00001	Jerry Jennings, PE	113 AIRPORT DRIVE, SUITE 100	EDENTON	(252) 482-7977
00002	C. E. Lassiter, Jr., PE	PO BOX 1587	GREENVILLE	(252) 830-3490
00003	H. Allen Pope, PE	124 DIVISION DRIVE	WILMINGTON	(910) 251-5724
00004	Robert W Lewis, PE	PO BOX 3165	WILSON	(252) 237-6164
00005	J. Wally Bowman, PE	2612 NORTH DUKE STREET	DURHAM	(919) 220-4600
00006	Gregory W Burns, PE	PO BOX 1150	FAYETTEVILLE	(910) 486-1493
00007	James M Mills, PE	PO BOX 14996	GREENSBORO	(336) 334-3192
00008	Tim Johnson, PE	PO BOX 1067	ABERDEEN	(910) 944-2344
00009	S. Pat Ivey, PE	375 SILAS CREEK PARKWAY	WINSTON-SALEM	(336) 703-6500
00010	Barry S Moose, PE	716 WEST MAIN STREET	ALBEMARLE	(704) 982-0101
00011	Michael A Pettyjohn, PE	PO BOX 250	NORTH WILKESBORO	(336) 667-9111
00012	Michael L Holder, PE	PO BOX 47	SHELBY	(704) 480-5400
00013	Jay J Swain, PE	PO BOX 3279	ASHEVILE	(828) 251-6171
00014	Joel B Setzer, PE	253 WEBSTER ROAD	SYLVA	(828) 586-2141

Ready

(*Advertisement & Invitation to Bid Report Window*)

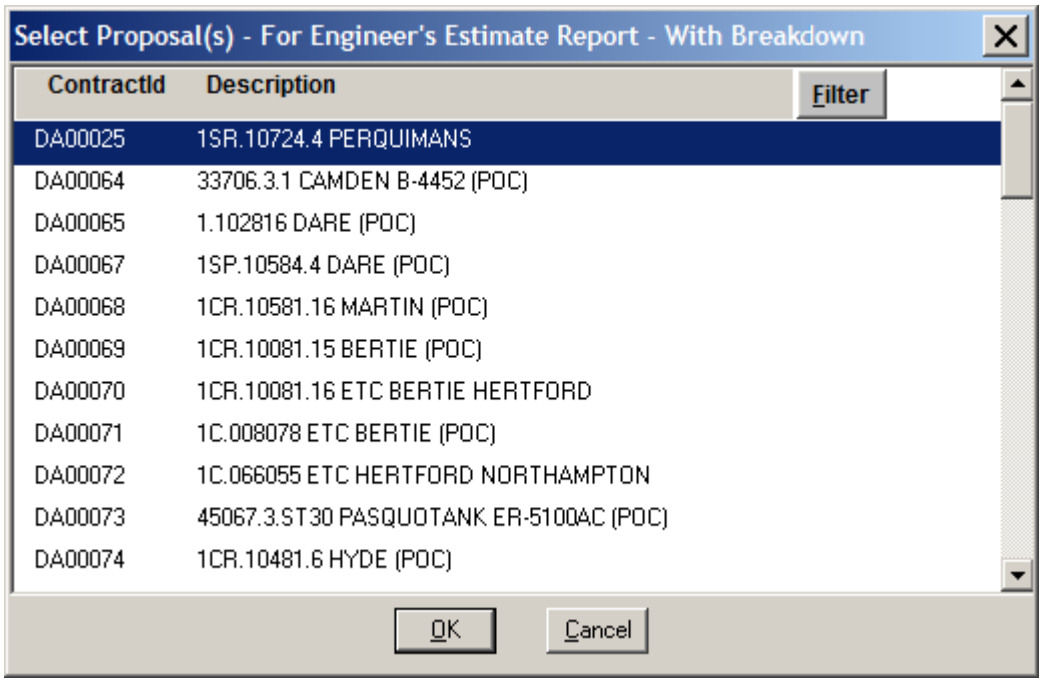
Engineer's Estimate (With Breakdown)

The **Engineer's Estimate (with Breakdown)** report lists items and quantities based on WBS number.



From the **SpecsReports** window.

Step	Action	Result
1	From the **REPORTS** drop-down menu, select **Engineer's Estimate**, then select **With Breakdown**	The **Select Proposal(s)** window will appear.



(*Select Proposal(s) – For Engineer's Estimate Report – With Breakdown Window*)

Continued on Following Page

Engineer's Estimate (With Breakdown)

(continued)

2	Click on the **proposal** to select it.	N/A

NOTE: You can click the **FILTER** button to narrow the list. See **Finding the Project Estimate Template** on page **2-32** for detailed instructions on how to use the filter.

If you would like to select multiple proposals at the same time, hold down the Ctrl key and click each proposal you wish to select.

3	Click the OK button.	The **Engineer's Estimate –With Breakdown Report** will appear.

Continued on Following Page

Engineer's Estimate (With Breakdown)

(continued)

SpecsReports

File View Reports Window Help

Engineer's Estimate Report - With Breakdown

North Carolina Department Of Transportation Page : 1 of 2

Engineer's Estimate Report (With breakdown)

DA00071 ROUTE SR 1361
1C.008078, 1CR.20081.37

STATE FUNDED
BERTIE

WIDENING AND RESURFACING.
SR-1361.

WBS : 1C.008078

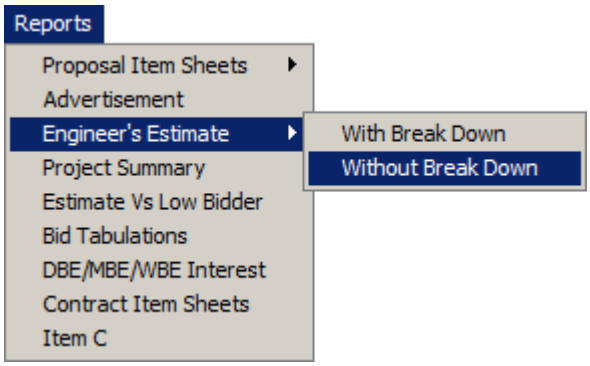
Line #	ItemNumber	Sec #	Description	Quantity	Unit Cost	Estimated Amount
			ROADWAY ITEMS			
0001	0000100000-N	800	MOBILIZATION	Lump Sum	L.S	20,179.31
0002	1330000000-E	607	INCIDENTAL MILLING	450 SY	5.00	2,250.00
0003	1489000000-E	610	ASPHALT CONC BASE COURSE, TYPE B25.0B	1,600 TON	39.00	62,400.00
0004	1525000000-E	610	ASPHALT CONC SURFACE COURSE, TYPE SF9.5A	2,540 TON	36.00	91,440.00
0005	1560000000-E	620	ASPHALT BINDER FOR PLANT MIX, GRADE PG 64-22	295 TON	525.00	154,875.00
0006	1880000000-E	SP	GENERIC PAVING ITEM ASPHALT CONRETE SURFACE COURSE TYPE S4.75A (LEVELING COURSE)	1,200 TON	65.00	78,000.00
0007	4589000000-N	SP	GENERIC TRAFFIC CONTROL ITEM TRAFFIC CONTROL	Lump Sum	L.S	1,260.00

Ready

(*Engineer's Estimate Report – With Breakdown Window*)

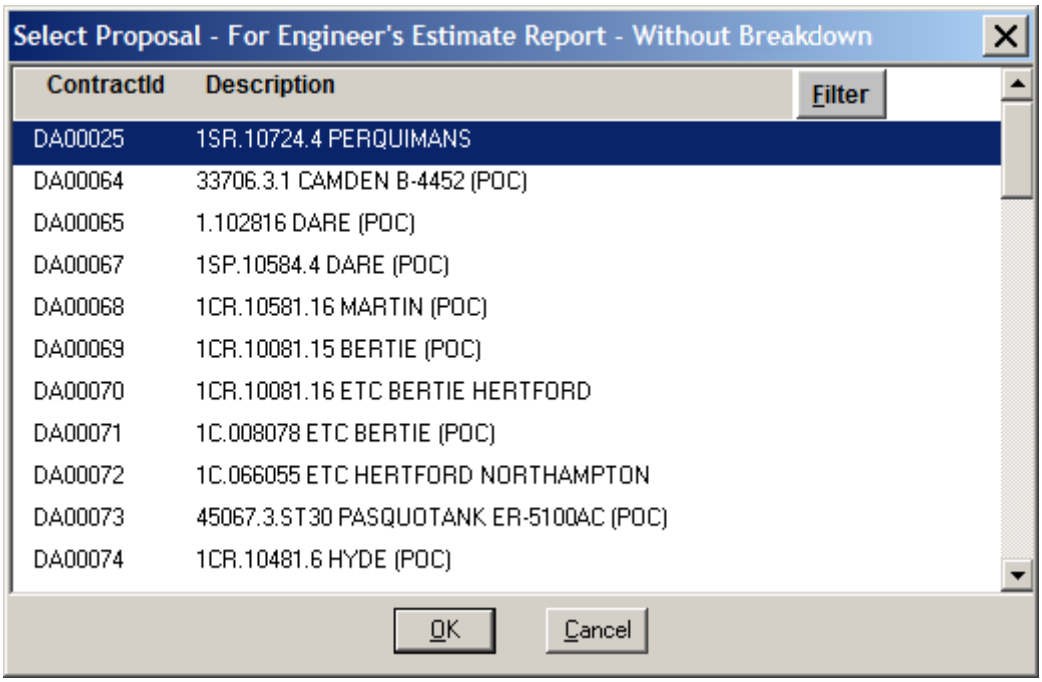
Engineer's Estimate (Without Breakdown)

The **Engineer's Estimate (without Breakdown)** reports lists all items and total quantities for a **Proposal**.



From the **SpecsReports** window.

Step	Action	Result
1	From the **REPORTS** drop-down menu, select **Engineer's Estimate**, then select **Without Breakdown**.	The **Select Proposal** window will appear.



(*Select Proposal – For Engineer's Estimate Report – Without Breakdown Window*)

Continued on Following Page

Engineer's Estimate (Without Breakdown)

(continued)

2	Click on the **proposal** to select it.	N/A

NOTE: You can click the **FILTER** button to narrow the list. See **Finding the Project Estimate Template** on page **2-32** for detailed instructions on how to use the filter.

If you would like to select multiple proposals at the same time, hold down the Ctrl key and click each proposal you wish to select.

3	Click the OK button.	The **Engineer's Estimate –Without Breakdown Report** will appear.

Continued on Following Page

Engineer's Estimate (Without Breakdown)

(continued)

SpecsReports

File View Reports Window Help

Engineer's Estimate Report - Without Breakdown

Jun 17, 2011 2:10 pm North Carolina Department Of Transportation Page : 1 of 1

Engineer's Estimate Report (Without breakdown)

DA00071 ROUTE SR 1361
1C.008078, 1CR.20081.37

STATE FUNDED
BERTIE

WIDENING AND RESURFACING.
SR-1361.

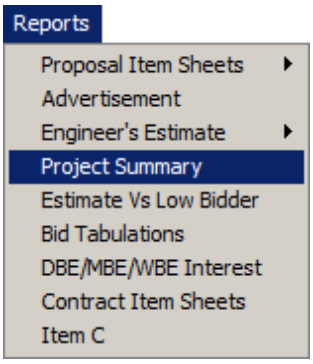
Line #	ItemNumber	Sec #	Description	Quantity	Unit Cost	Estimated Amount
			ROADWAY ITEMS			
0001	0000100000-N	800	MOBILIZATION	Lump Sum	L.S	33,632.19
0002	1330000000-E	607	INCIDENTAL MILLING	450 SY	5.00	2,250.00
0003	1489000000-E	610	ASPHALT CONC BASE COURSE, TYPE B25.0B	2,600 TON	39.00	101,400.00
0004	1525000000-E	610	ASPHALT CONC SURFACE COURSE, TYPE SF9.5A	4,115 TON	36.00	148,140.00
0005	1560000000-E	620	ASPHALT BINDER FOR PLANT MIX, GRADE PG 64-22	495 TON	525.00	259,875.00
0006	1880000000-E	SP	GENERIC PAVING ITEM ASPHALT CONRETE SURFACE COURSE TYPE S4.75A (LEVELING COURSE)	1,910 TON	65.00	124,150.00
0007	4589000000-N	SP	GENERIC TRAFFIC CONTROL ITEM TRAFFIC CONTROL	Lump Sum	L.S	2,000.00

Ready

(*Engineer's Estimate Report – Without Breakdown Window*)

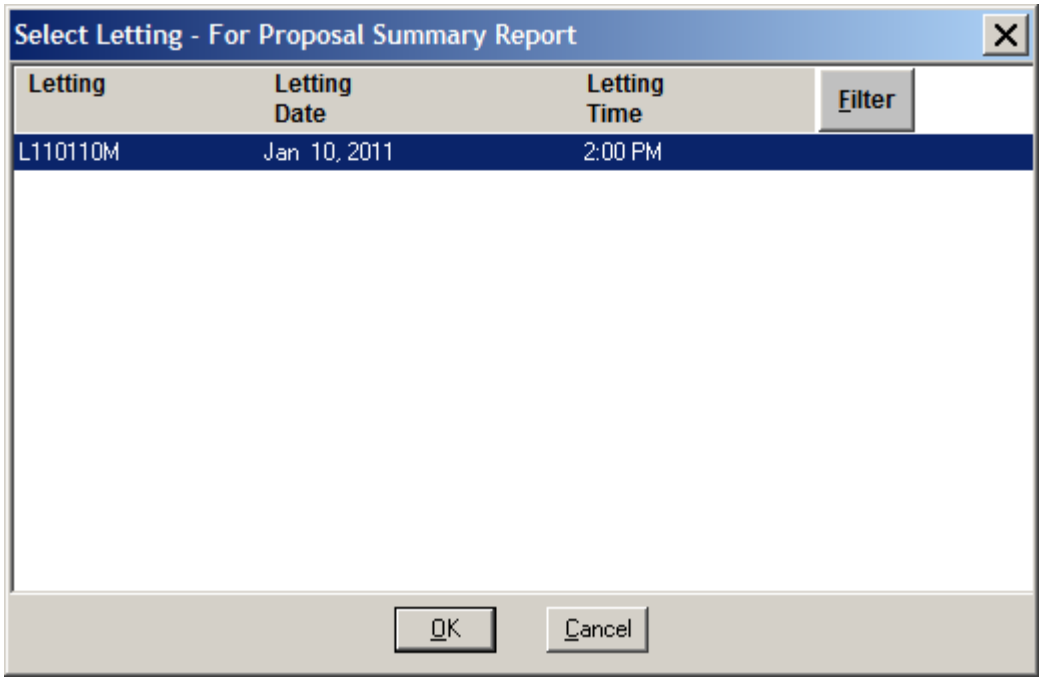
Project Summary

This letting-level report lists all **Proposals** in a **Letting** and breaks down the **Engineer's Estimate** and **Low Bid** by **WBS Number** and **Roadway/Structure Costs**.



From the **SpecsReports** window.

Step	Action	Result
1	From the **REPORTS** drop-down menu, select **Project Summary**.	The **Select Letting – For Proposal Summary Report** window will appear.



(*Select Letting – For Proposal Summary Report Window*)

Continued on Following Page

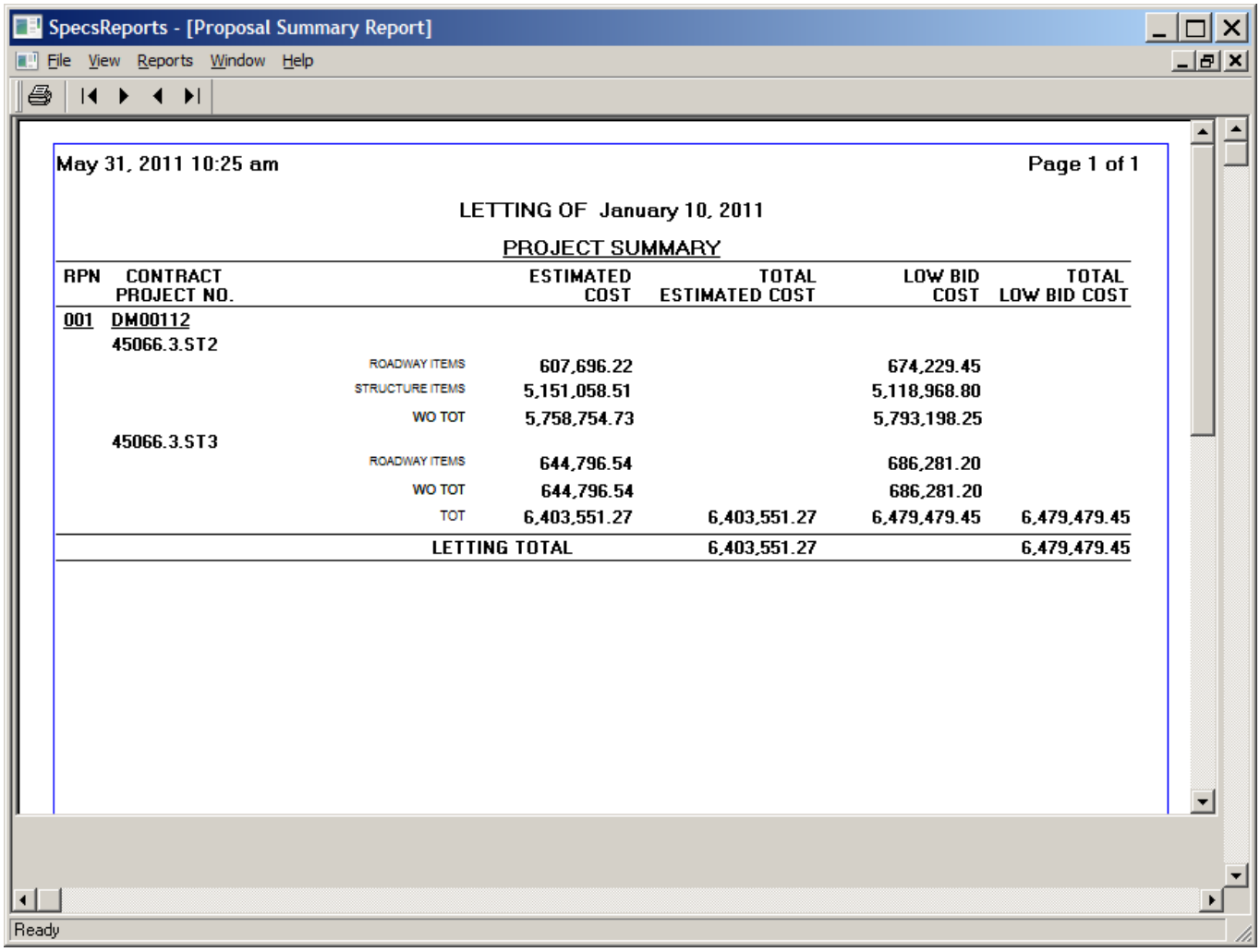
Project Summary

(continued)

2	Click on the **letting** to select it.	N/A

NOTE: You can click the **FILTER** button to narrow the list. See **Finding the Project Estimate Template** on page **2-32** for detailed instructions on how to use the filter.

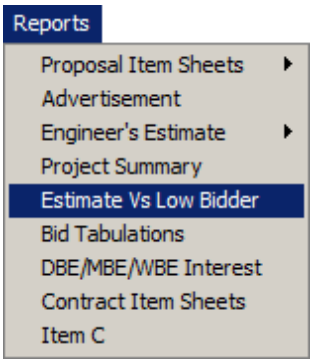
3	Click the [OK] button.	The **Proposal Summary Report** will appear.



(*Proposal Summary Report Window*)

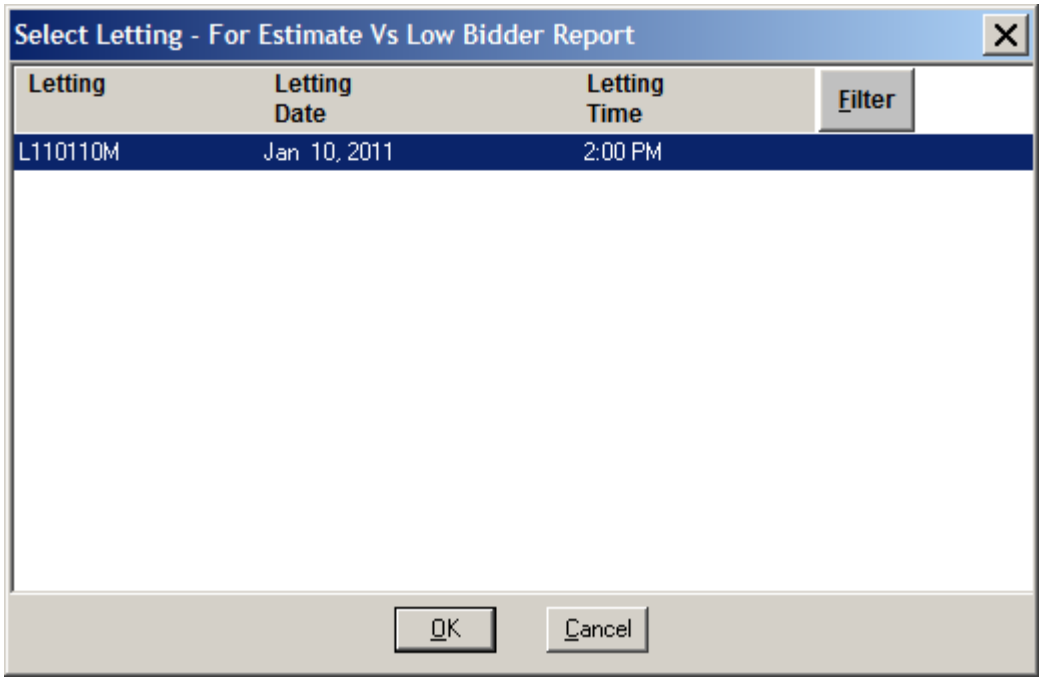
Estimate vs. Low Bidder

This letting-level report allows the user to compare the **Engineer's Estimate** to the **Low Bidder** by item and includes calculations on the % and amount of difference between the two.



From the **SpecsReports** window.

Step	Action	Result
1	From the **REPORTS** drop-down menu, select **Estimate Vs Low Bidder**.	The **Select Letting** window will appear.



(*Select Letting – For Estimate Vs Low Bidder Report Window*)

Continued on Following Page

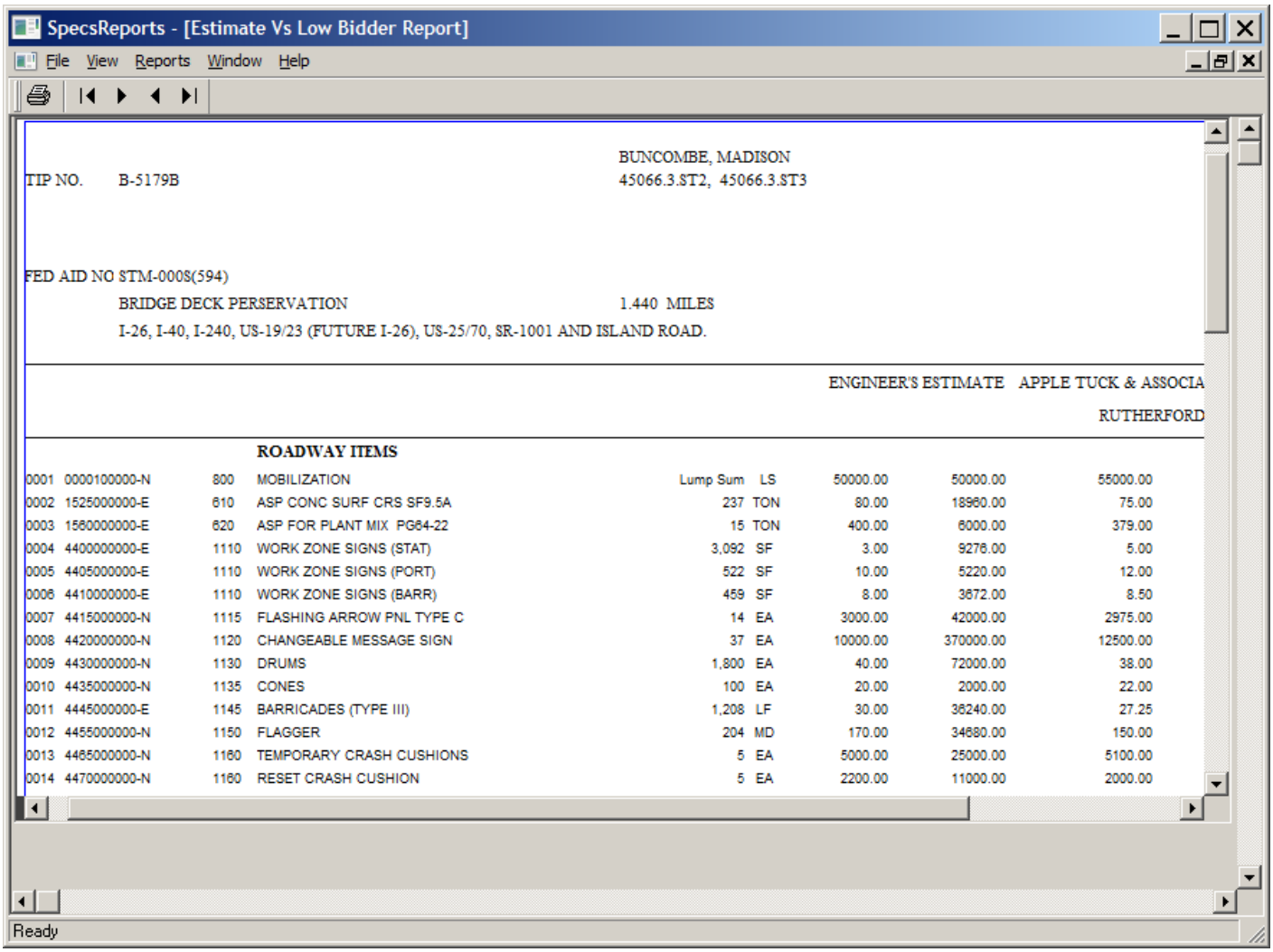
Estimate vs. Low Bidder

(continued)

2	Click on the **letting** to select it.	N/A

NOTE: You can click the **FILTER** button to narrow the list. See **Finding the Project Estimate Template** on page **2-32** for detailed instructions on how to use the filter.

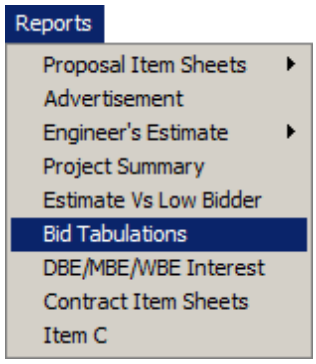
3	Click the [OK] button.	The **Estimate Vs Low Bidder Report** will appear.



(*Estimate Vs Low Bidder Report Window*)

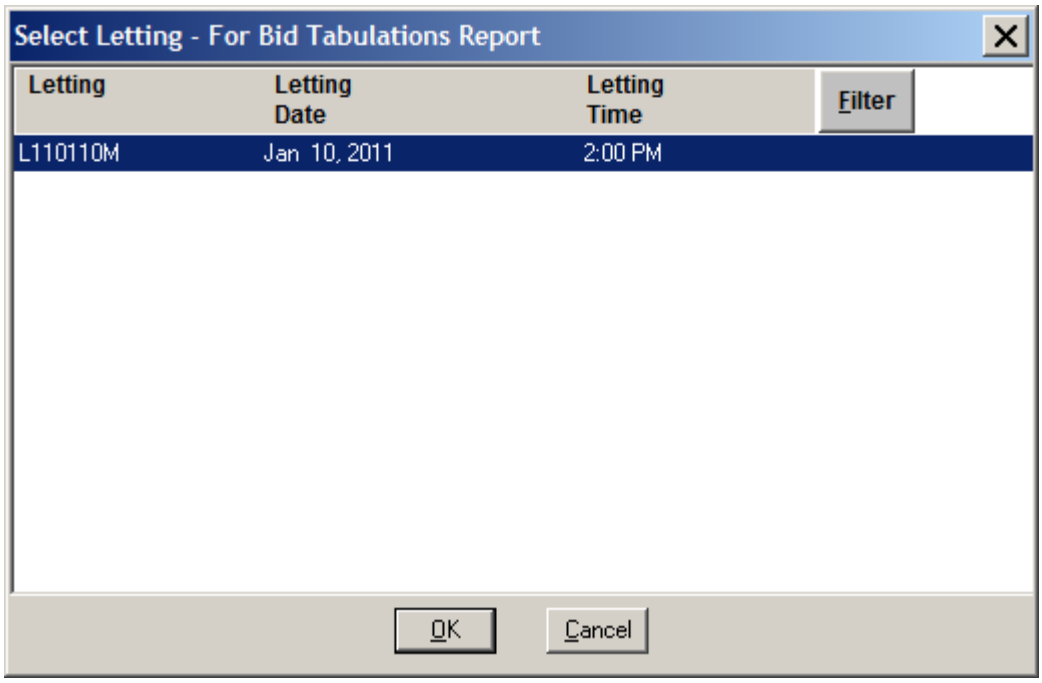
Bid Tabulations

The **Bid Tabulations** report lists items and bids for all bidders by **Proposal** for all proposals in a **Letting**.



From the **SpecsReports** window.

Step	Action	Result
1	From the **REPORTS** drop-down menu, select **Bid Tabulations**.	The **Select Letting – For Bid Tabulations Report** window will appear.



(*Select Letting – For Bid Tabulations Report Window*)

Continued on Following Page

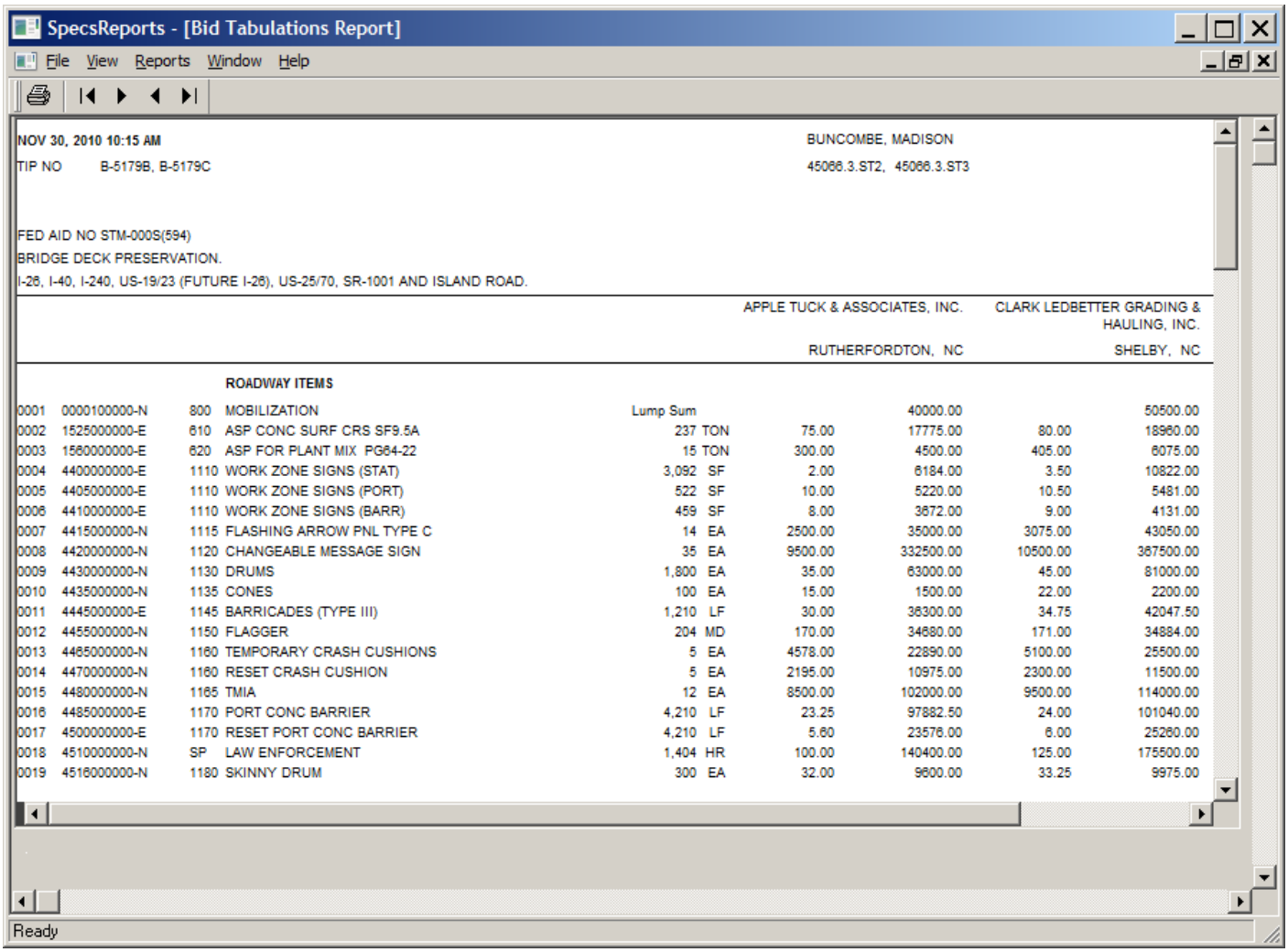
Bid Tabulations

(continued)

2	Click on the **letting** to select it.	N/A

NOTE: You can click the **FILTER** button to narrow the list. See **Finding the Project Estimate Template** on page **2-32** for detailed instructions on how to use the filter.

3	Click the [OK] button.	The **Bid Tabulations Report** will appear.



NOV 30, 2010 10:15 AM BUNCOMBE, MADISON

TIP NO B-5179B, B-5179C 45066.3.ST2, 45066.3.ST3

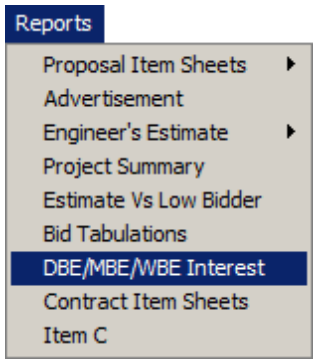
FED AID NO STM-000S(594)
BRIDGE DECK PRESERVATION.
I-26, I-40, I-240, US-19/23 (FUTURE I-26), US-25/70, SR-1001 AND ISLAND ROAD.

						APPLE TUCK & ASSOCIATES, INC. RUTHERFORDTON, NC		CLARK LEDBETTER GRADING & HAULING, INC. SHELBY, NC	
			ROADWAY ITEMS						
0001	0000100000-N	800	MOBILIZATION	Lump Sum			40000.00		50500.00
0002	1525000000-E	610	ASP CONC SURF CRS SF9.5A	237	TON	75.00	17775.00	80.00	18960.00
0003	1560000000-E	620	ASP FOR PLANT MIX PG64-22	15	TON	300.00	4500.00	405.00	6075.00
0004	4400000000-E	1110	WORK ZONE SIGNS (STAT)	3,092	SF	2.00	6184.00	3.50	10822.00
0005	4405000000-E	1110	WORK ZONE SIGNS (PORT)	522	SF	10.00	5220.00	10.50	5481.00
0006	4410000000-E	1110	WORK ZONE SIGNS (BARR)	459	SF	8.00	3672.00	9.00	4131.00
0007	4415000000-N	1115	FLASHING ARROW PNL TYPE C	14	EA	2500.00	35000.00	3075.00	43050.00
0008	4420000000-N	1120	CHANGEABLE MESSAGE SIGN	35	EA	9500.00	332500.00	10500.00	367500.00
0009	4430000000-N	1130	DRUMS	1,800	EA	35.00	63000.00	45.00	81000.00
0010	4435000000-N	1135	CONES	100	EA	15.00	1500.00	22.00	2200.00
0011	4445000000-E	1145	BARRICADES (TYPE III)	1,210	LF	30.00	36300.00	34.75	42047.50
0012	4455000000-N	1150	FLAGGER	204	MD	170.00	34680.00	171.00	34884.00
0013	4465000000-N	1160	TEMPORARY CRASH CUSHIONS	5	EA	4578.00	22890.00	5100.00	25500.00
0014	4470000000-N	1160	RESET CRASH CUSHION	5	EA	2195.00	10975.00	2300.00	11500.00
0015	4480000000-N	1165	TMIA	12	EA	8500.00	102000.00	9500.00	114000.00
0016	4485000000-E	1170	PORT CONC BARRIER	4,210	LF	23.25	97882.50	24.00	101040.00
0017	4500000000-E	1170	RESET PORT CONC BARRIER	4,210	LF	5.60	23576.00	6.00	25260.00
0018	4510000000-N	SP	LAW ENFORCEMENT	1,404	HR	100.00	140400.00	125.00	175500.00
0019	4516000000-N	1180	SKINNY DRUM	300	EA	32.00	9600.00	33.25	9975.00

(*Bid Tabulations Report Window*)

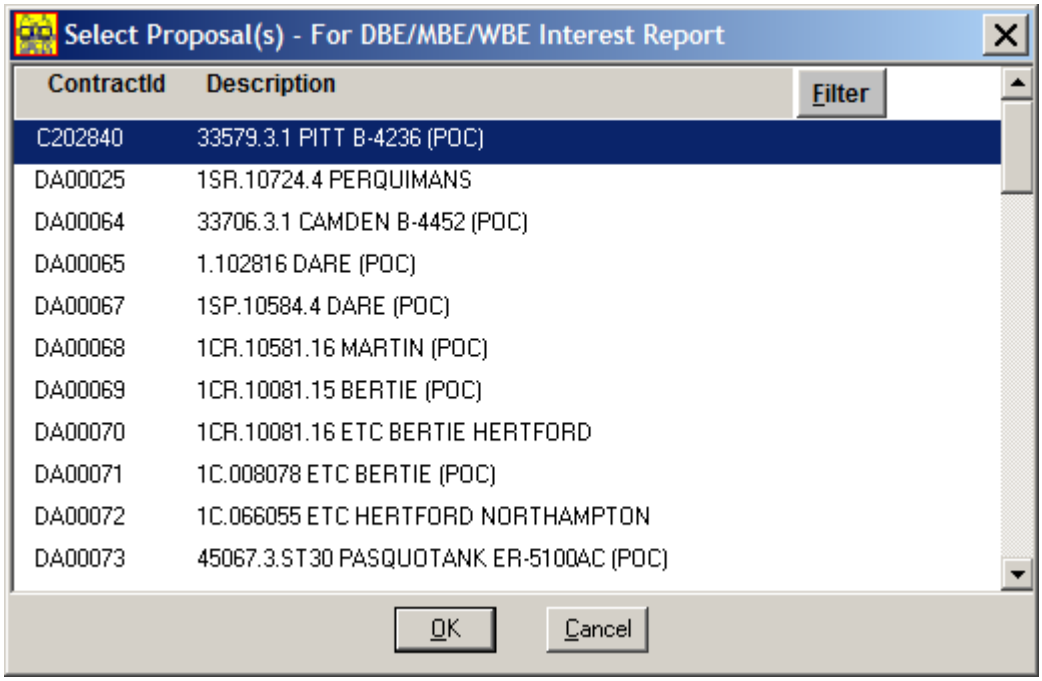
DBE/MBE/WBE Interest Report

The **DBE/MBE/WBE Interest** report will assist you in setting your goals for the contract. It can be run after entering prices in the proposal.



From the **SpecsReports** window.

Step	Action	Result
1	From the **REPORTS** drop-down menu, select **DBE/MBE/WBE Interest**.	The **Select Proposal(s)** window will appear.



(*Select Proposal(s) – For DBE/MBE/WBE Interest Report Window*)

Continued on Following Page

DBE/MBE/WBE Interest Report

(continued)

2	Click on the **proposal** to select it.	N/A

🗁**NOTE:** You can click the **FILTER** button to narrow the list. See **Finding the Project Estimate Template** on **page 2-32** for detailed instructions on how to use the filter.

3	Click the [OK] button.	The **DBE/MBE/WBE Interest Report** window will appear.

Feb 03, 2012 3:02 pm North Carolina Department Of Transportation Page 1 of 4

MBE/WBE Interest Report

DA00068 ROUTE NC 11
1CR.10581.16

STATE FUNDED
MARTIN

RESURFACING.
NC-11 FROM OAK CITY C/L TO BERTIE CO LINE.

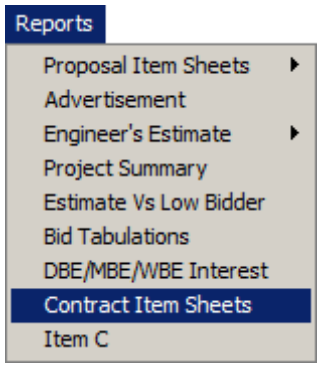
JANUARY 18, 2011 Letting

DESCRIPTION	PERCENT
PAVEMENT MARKINGS	12.00
HAULING AND TRUCKING	80.69
TOTAL	92.69

(*DBE/MBE/WBE Interest Report*)

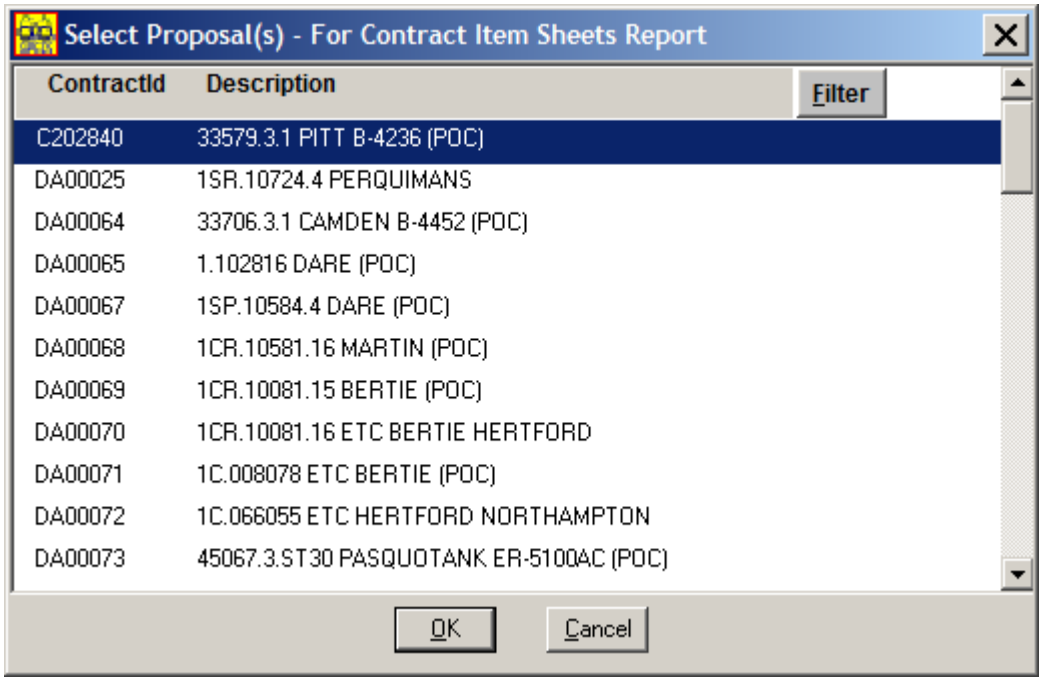
Contract Item Sheets

The **Contract Item Sheets** report will print the bid for placing in the contract for the awarded bidder.



From the **SpecsReports** window.

Step	Action	Result
1	From the **REPORTS** drop-down menu, select **Contract Item Sheets**.	The **Select Proposal(s)** window will appear.



(*Select Proposal(s) – For Contract Item Sheets Report Window*)

Continued on Following Page

Contract Item Sheets

(continued)

2	Click on the **proposal** to select it.	N/A

NOTE: You can click the **FILTER** button to narrow the list. See **Finding the Project Estimate Template** on **page 2-32** for detailed instructions on how to use the filter.

3	Click the [OK] button.	The **Contract Item Sheets Report** will appear.

Feb 03, 2012 3:42 pm North Carolina Department Of Transportation Page : 1 of 1

Contract Item Sheets For DA00072

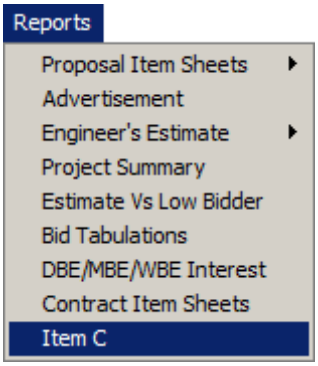
Line #	ItemNumber	Sec #	Description	Quantity Unit	Unit Bid Price	Amount Bid
			ROADWAY ITEMS			
0001	0000100000-N	800	MOBILIZATION	Lump Sum LS	8,000.00	8,000.00
0002	1330000000-E	607	INCIDENTAL MILLING	450 SY	8.00	3,600.00
0003	1489000000-E	610	ASPHALT CONC BASE COURSE, TYPE B25.0B	1,700 TON	32.00	54,400.00
0004	1525000000-E	610	ASPHALT CONC SURFACE COURSE, TYPE SF9.5A	8,975 TON	31.50	282,712.50
0005	1560000000-E	620	ASPHALT BINDER FOR PLANT MIX, GRADE PG 64-22	700 TON	527.00	368,900.00
0006	1880000000-E	SP	GENERIC PAVING ITEM ASPHALT CONC SURFACE COURSE, TYPE S4.75A (LEVELING COURSE)	650 TON	32.00	20,800.00
0007	4589000000-N	SP	GENERIC TRAFFIC CONTROL ITEM TRAFFIC CONTROL	Lump Sum LS	3,000.00	3,000.00
0008	4810000000-E	1205	PAINT PAVEMENT MARKING LINES (4")	362,548 LF	0.09	32,629.32
			TOTAL AMOUNT OF BID FOR ENTIRE PROJECT			$774,041.82

1542/Feb03/Q375025/D17183100000/E8

(*Contract Item Sheets Report Window*)

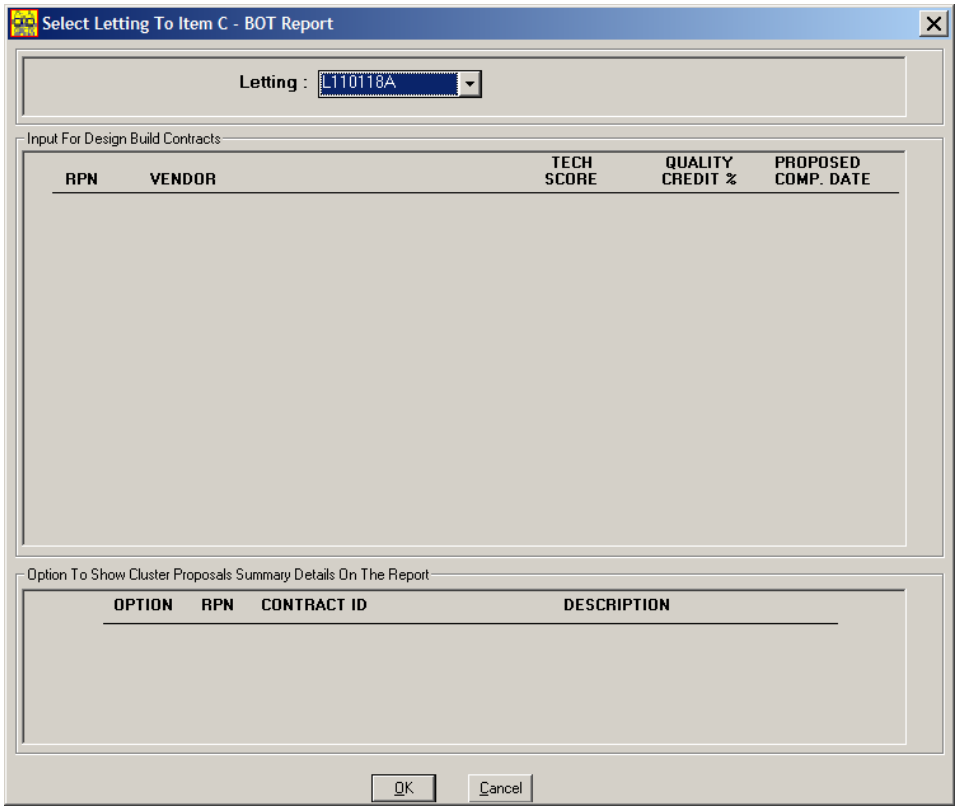
Item C

The **Item C** report is a summary of the letting.



From the **SpecsReports** window.

Step	Action	Result
1	From the **REPORTS** drop-down menu, select **Item C**.	The **Select Letting to Item C** window will appear.



(*Select Letting To Item C Window*)

Continued on Following Page

Item C

(continued)

2	Select the **letting** from the drop-down list in the **LETTING** field.	N/A

NOTE: You may have just one in the list.

3	Click the OK button.	The **Item C Report** will appear.

HIGHWAY LETTING PAGE : 1 of 7
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION ITEM C
DIVISION OF HIGHWAYS
RALEIGH N.C.
JANUARY 18, 2011
DIVISION 00001

DA00025
1SP.10724.4
STATE FUNDED
PERQUIMANS

PROPOSAL LENGTH 0.549 MILES
TYPE OF WORK BRIDGE CLEANING AND PAINTING.
LOCATION PERQUIMANS BRIDGE #14.

RPN 001 1 BIDDER(S) MBE GOAL 0.00 % WBE GOAL 0.00%
ESTIMATE 187,000.00
DATE AVAILABLE JUL 15 2010
FINAL COMPLETION JUN 01 2011

	$ TOTALS	% DIFF
ASTRON GENERAL CONTRACTING COMPANY INC JACKSONVILLE, NC	234,000.00	+25.1

(*Item C Report*)

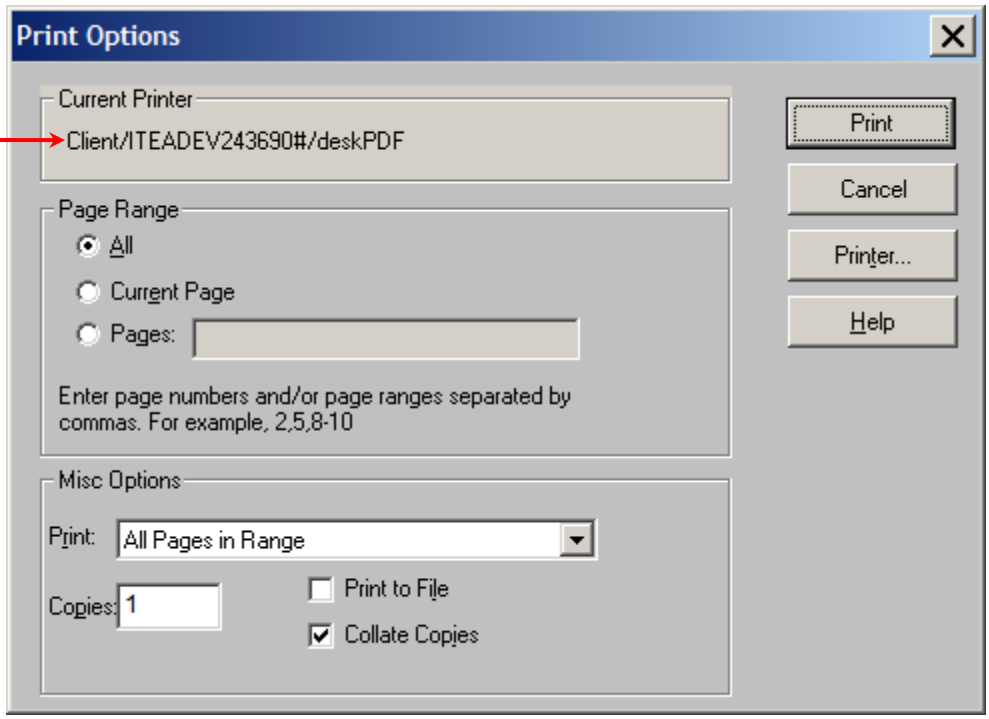
Saving a Report as a PDF

After creating a report, you can save it as a **PDF** file for future use.

From the window of the report you wish to save:

Step	Action	Result
1	Click the **PRINT** button.	The **Print Options** dialog will appear.

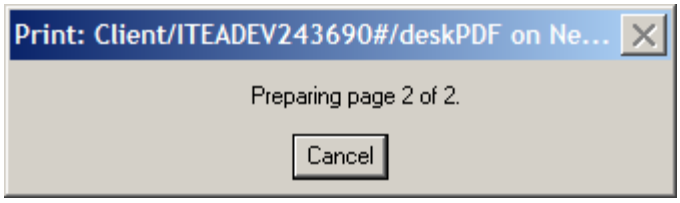
Notice that the printer is set to deskPDF. If this is ANY other printer. Stop this procedure and set deskPDF as your default printer.



(*Print Options Dialog*)

NOTE: If the printer is set to any other printer than deskPDF, stop here, go to **Setting deskPDF as The Default Printer** on page **C-1**, then restart Citrix.

2	Click the **PRINT** button.	The following status dialog will appear.

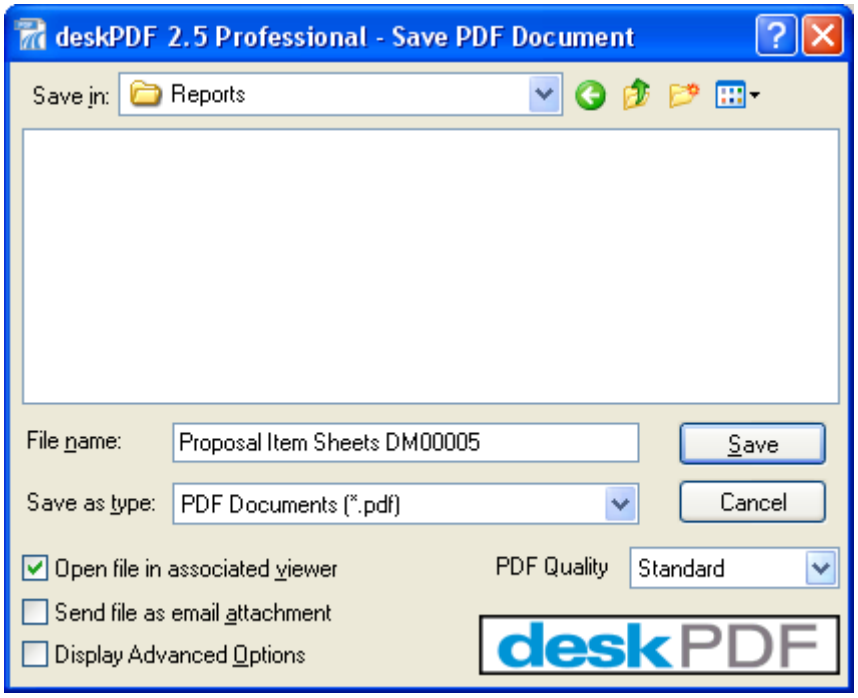


Continued on Following Page

Saving a Report as a PDF

(continued)

Next, the **deskPDF Save PDF Document** dialog will appear.

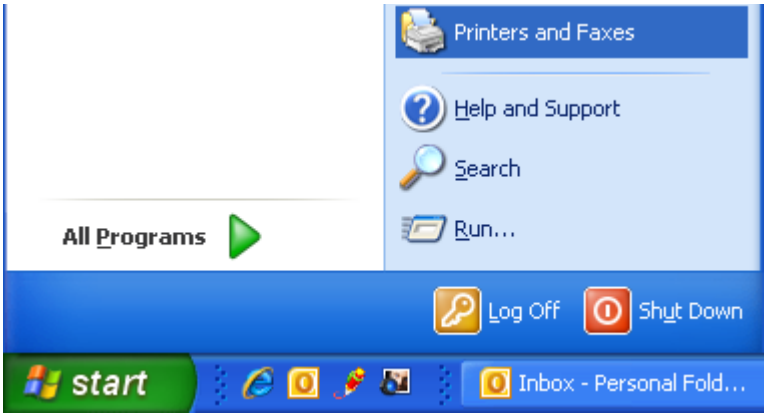


(*deskPDF Save PDF Document Dialog*)

3	Navigate to the directory where you wish to save the report.	N/A
4	Type a **filename** for the report in the **FILE NAME** field.	N/A
5	Click the **SAVE** button.	The **PDF** file will be saved in the specified location.

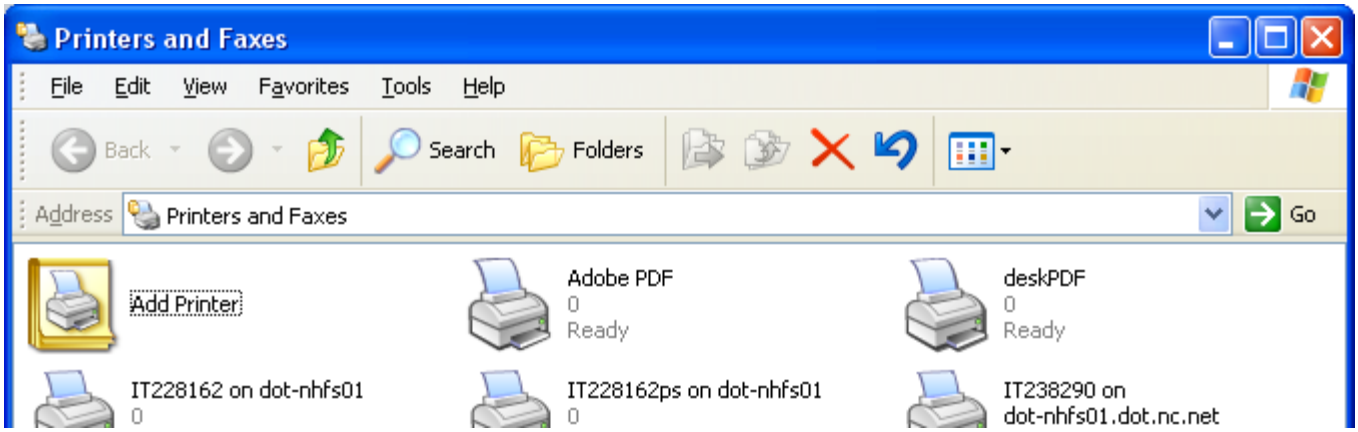
Printing a Saved Report

There will be times when you will need to print the reports that you have saved. In this case, if your default printer is set to deskPDF, you will need to change it back.



(*Windows™ Start Menu*)

Step	Action	Result
1	Click the **WINDOWS START MENU** button.	The **Windows Start Menu** will expand.
2	Select **Printers and Faxes** from the menu.	The **Printers and Faxes** window will appear.



(*Printers and Faxes Window*)

Continued on Following Page

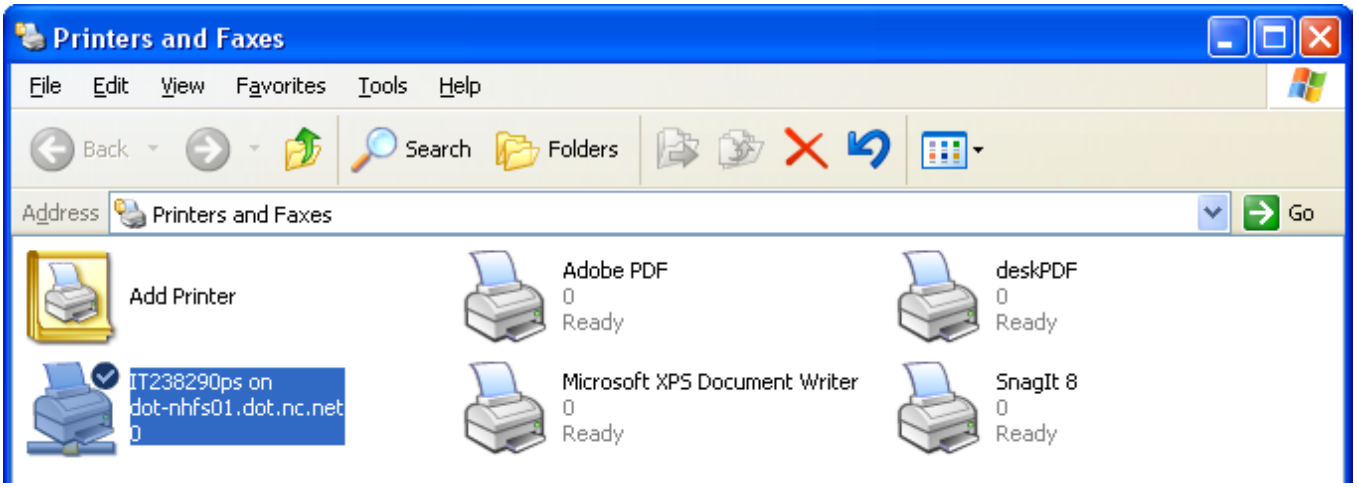
Printing a Saved Report

(continued)

3	Right-click on the printer icon that you wish to print from.	A right-click menu will appear

(*Right-Click Menu*)

4	Select **Set as Default Printer** from the menu.	You have now set your default printer.



(*Printers and Faxes Window*)

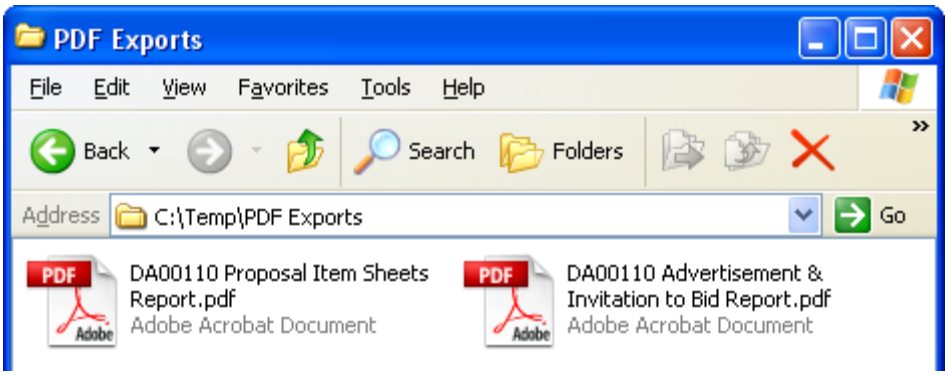
Now everything you print will be sent to this printer.

NOTE: If you are still logged into Citrix, deskPDF will still be saved as your default printer.
However, you will need to change it again the next time you log in.

Continued on Following Page

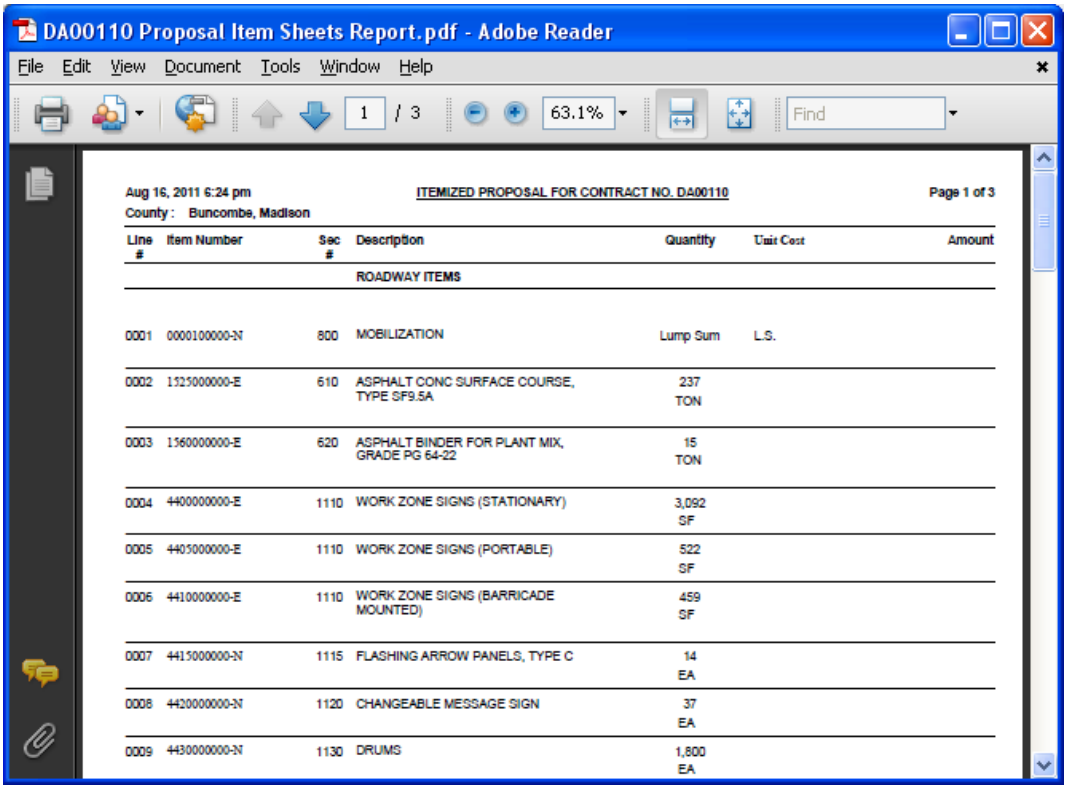
Printing a Saved Report

(continued)



(*Saved Reports*)

5	Go to the folder where the reports are saved.	N/A
6	Double-click the report you wish to print.	The report will open in a new window.



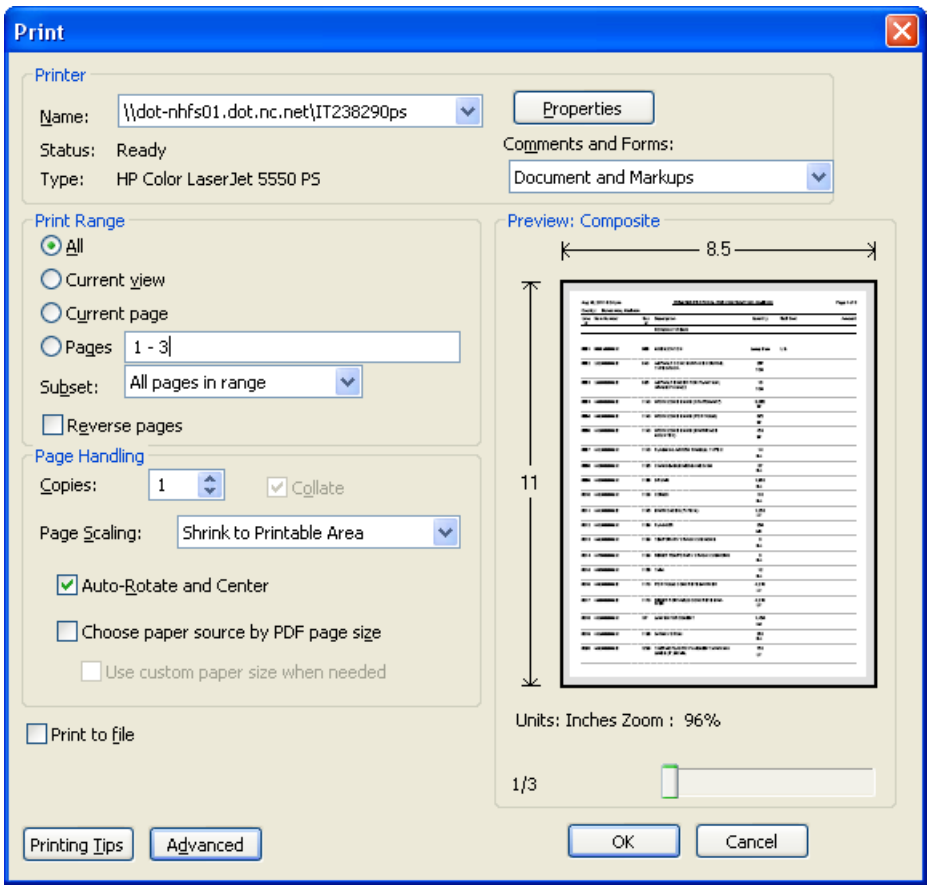
(*PDF Report*)

Continued on Following Page

Printing a Saved Report

(continued)

7	Click the **PRINT** button.	The **Print** dialog will appear.



(*Print Dialog*)

8	Click the **OK** button.	The report will print to the default printer.