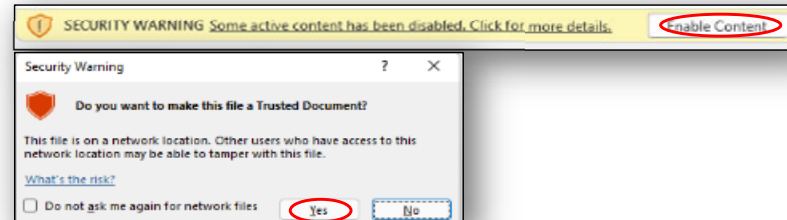




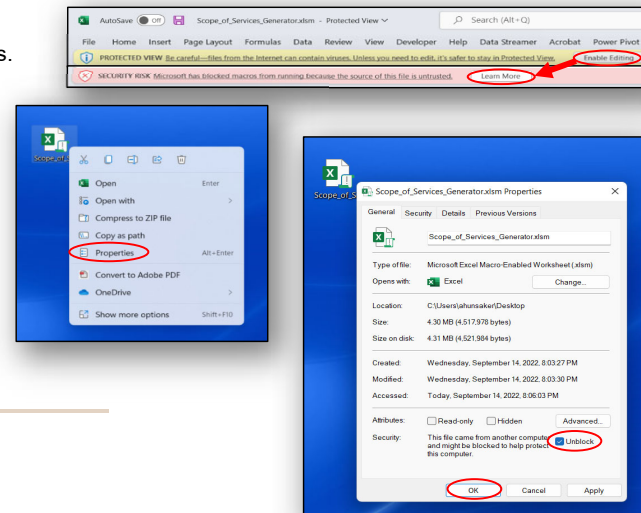
Quick setup: Click on the provided link to download the “**Scope_of_Services_Generator.xlsm**” file to either your desktop or your “Downloads” folder for ease of access.

Open the “**Scope_of_Services_Generator.xlsm**” file. A Security Warning will appear, select the “Enable Content” button (you may have to click on it twice) underneath the ribbon at the top of the excel file. If a pop-up window appears asking if this is a trusted file, select “Yes”.



After downloading the file, an error message might appear noting a security risk for opening macros. The macros comes from a trusted source. Do the follow these steps to make this a trusted file:

- a. Navigate to the folder or location where you saved the file.
- b. Right-click the file and choose Properties from the context menu.
- c. At the bottom of the General tab, select the Unblock checkbox and select OK.
- d. If you don't see the Unblock checkbox in properties, then open this link for more options: [Blocked Message](#)



Now the SOS Generator is ready to begin the 3-step process for creating your PDN-specific Scope of Services.

1. For **STEP 1**, enter the name of the prime consultant and all subconsultants on the project.

a. Once the form is complete, continue to **STEP 2** by selecting the “Next” button at the upper right-hand corner of the screen.

STEP ONE: List Consultants

Instructions: Enter the name of the prime consultant and all subconsultants, then proceed to Step 2.

Primary	Enter Primary Consultant
Sub	Enter 1st Sub Consultant
Sub	Enter 2nd Sub Consultant
Sub	...
Sub	
Sub	
Sub	
Sub	
Sub	
Sub	

2. In **STEP 2**, select the PDN activities you want to scope by clicking on the applicable checkboxes.

a. Checkboxes may be selected either by clicking the i) “Use PDN Graphic to Select Activities” button and selecting the checkboxes on the graphic next to the respective PDN activity, or ii) selecting the PDN activities directly from the **STEP 2** Activities Tab.

STEP TWO: Select Activities

Instructions: Select activities to be included in project scope. For each activity selected the responsible consultant.

Use PDN Graphic to Select Activities

STAGE 1 PROJECT INITIATION STAGE 2 ALIGNMENT DEFINED STAGE 3 PLAN-IN-HAND STAGE 4 PLANS, SPECIFICATION, & ESTIMATES (P&S&E)/LETTING

Environmental Analysis (EN) 2EN1 3EN1 / 3EN2 Design Noise Report Determine Final Noise Abatement 2EN2 3EN3 / 4EN1

PDN - Activities

Instructions: Select activities to be included in project scope. For each activity selected the responsible consultant.

Long Range Transportation Planning

STAGE 1 PROJECT INITIATION STAGE 2 ALIGNMENT DEFINED

Conduct Candidate Project Analysis (CPA) Advance Natural Environment Tasks (2EN1) Advance Human Environment Tasks (2EN2) Complete Action and Implementation Survey (AIS)

Complete Express Design Traffic Analysis (TMA) Continue Public Engagement (CPE) Assist With Public Engagement (AWPE) Complete Transport Management Plan

b. A pop-up will appear, asking you to select the prime consultant and subconsultants you would like to assign to that activity (Return to **STEP 1** if you need to add a consultant name).

Click on the “Done” button when complete.
(repeat for each PDN activity).

Select Parties

2EN2

Done

Enter Primary Consultant

Enter 1st Sub Consultant

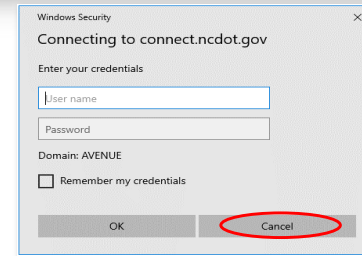
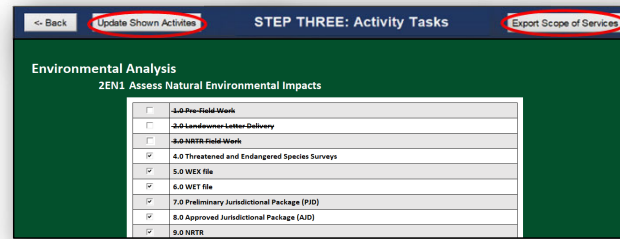
Enter 2nd Sub Consultant

...

c. Continue to **STEP 3** by selecting the “Next” button at the upper right corner of the screen.

3. Begin **STEP 3** by clicking the “Update Activity Table” Button near the upper left corner of the screen.

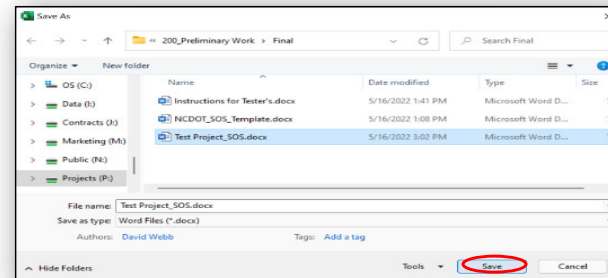
- a. Wait for the tool to update. A table of tasks for each activity selected will then appear for each selected activity (this may take up to three minutes).
- b. Review each activity's table and deselect the tasks that are not needed on the project. Deselected tasks will be crossed out.
- c. Once all tasks have been confirmed, begin the export of your scope of services document, by selecting the “Export Scope of Services” button in the upper-right corner of the screen.
- d. If prompted to enter user name and password, select "Cancel"



After a moment of updating (which may take upwards of three minutes), another dialog box will appear requesting a “Save As” location for the scope of services document. Enter in a “File Name” (e.g. I-95 Reconstruct_SOS) and your “Save As Type” in the “Save As” window.

IMPORTANT: This document becomes the project-specific scope of services that when finalized is sent to the NCDOT Project Manager for review.

- a. After entering the file name, select the Save button in the lower left corner of the “Save As” window.
- b. The scope will begin exporting now and a progress bar will inform you what percent of the export is complete. The SOS document will appear to be minimized until you click the file you have just named. Export time may range from **1 to 30 minutes** (if all activities and tasks are selected and depending on the reoccurrence of Word autosave). This document is found in your Taskbar, attached to the Microsoft Word Logo.



IMPORTANT: While the file is exporting it is critical that the file is NOT clicked on, as the tool will continue to export in the place you have just clicked. This will cause the sections to not be in their proper order.

After all selected activities and tasks have been exported successfully, return to the SOS document to fill out the project details (e.g. project name, contact details, contract type).

Save the export before closing its Word window.

IMPORTANT: After export is complete, review the document and **manually delete** any unneeded subtasks from the Word document.

The Scope of Services is now complete and is ready to be emailed to the NCDOT Project Manager or uploaded for review.