

KYTC

Quick Reference: WebPrecon PROPOSAL Manual for PS & E Branch

For WebPrecon Version 2.01.077.05



Proposal Quick Reference Guide

I. Create Proposal

- Click the **Actions** button on the project row of the project for which the proposal is being created
- Select **Create Proposal**.
- Complete the fields according to the table below.

FIELD	INSTRUCTIONS / EXAMPLES
Contract ID	Six digit number beginning with two digit year, then your two digit unique individual project designer number followed by your two digit sequential number). Do not use spaces or dashes within the 6 digit Contract ID.
Federal Project Number	Federal: STPS 5122 (17) State: FD05 023 0127 003-004) Federal group job example: 121GR14D019-NHPP. State group job example: 121GR14D020-FD04.
Proposal Description	Enter route name followed by the route number in parentheses. (i.e., RICHMOND-LANCASTER ROAD (KY 25))
Proposal Long Description	Leave blank.
Deferred Payment	Yes or No; Always enter N .
Contract Type	1. Federal 2. Federal Group 3. State 4. State Group
Previous Let as ContID	Leave blank. If this contract has been rejected or withdrawn from a previous letting, Construction Procurement will enter the previous CID number.
Contract Work Type	Select the type of work from the drop-down menu. This description should match exactly with that used on the Project in WebPrecon.

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Contract Qualification Class 1 through Class 6	Leave blank. Construction Procurement will complete these fields as needed.
Doc ID	Leave blank.
Designer	Select your four character designer code name from the drop-down menu (i.e., ZB02).
Primary County	You will not be able to enter anything in this field until after this screen has been saved.
Primary District	You will not be able to enter anything in this field until after this screen has been saved.
Mandatory Pre-Bid Mtg	If applicable, select a mandatory pre-bid meeting date from the drop-down calendar. Be sure to send an email to the appropriate Construction Procurement staff with the date and a copy of the meeting notice attached.
Warranty Date	Leave blank.
Group Project	Enter Y or N .
Plans (Roadway or Bridge)	If the proposal has roadway plans enter Y . Otherwise enter N .
Cross Sections	If the proposal has cross sections enter Y . Otherwise enter N .
KPDES Flag	Enter Y if there is a corresponding bid item (23143ED KPDES Permit and Temp Erosion Control). Otherwise, leave blank.
DBE Goal	Leave blank; will to be completed by Construction Procurement as needed
DBE Goal Percent	Leave blank; will be completed by Construction Procurement as needed
Type of Funding	Select fund type from the drop-down menu.
OJT Goal	Leave blank.
OJT Goal Units	Leave blank.

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OJT Goal Comments	Leave blank.
Last Updated By	This field will auto-generate and auto-populate after saving the data on this screen the first time.

- Click the **Save** button.

Highlighted fields in the illustration below indicate those that need appropriate entries at this time. Many will be left blank

- Select the **Primary County** number from the drop-down menu.
- Select the **Primary District** number from the drop-down menu.
 - On a group job, these selections will be based on the county and district that will have primary responsibility for oversight of the contract construction.
- Click the **Save** button.

1. Projects Tab

- Click the **Projects** tab.
 - Ensure that the **Control Proj** box is checked.
 - If this is a group job, click on the **Select Projects** button to attach additional proposals to the contract. Enter the required project ID's in the search field.
 - Click on the project line.
 - Click the **Add to Proposal** button.
- Only one project can have the controlling project box checked.

2. Time Tab

- Click the **Time** tab at the left of the screen
- Click the **New** button.

FIELD	INSTRUCTIONS / EXAMPLES
Time ID	Enter 00 for the first. If applicable, subsequent milestone ID's will be numbered sequentially, 01, 02 and etc.
Time Description	Enter APPLIES TO ENTIRE CONTRACT.
Time Type	Select from the drop-down menu appropriate type: AD = Working Days CD = Calendar Days (rarely used) DT = Completion Date

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SN Flag	Enter Y if there is a Special Note in the proposals regarding Liquidated Damages and/or the contract time. Otherwise, leave blank.
Number of Time Units	Enter the number of Working Days or Calendar Days. No entry needed for Calendar Date time type.
Time Unit	Select Hours or Days from the drop-down menu.
Main Proposal Time	Enter a check mark in the box.
Completion Date	Use the drop-down calendar to select a date for the Calendar Date time type.
Start Date	Use the drop-down calendar to select a start date only if there is a required start date. Otherwise, leave blank.
Liquidated Damages Rate	If there is a Liquidated Damages rate specified in the proposal beyond the Spec Book provisions, enter the dollar amount.
Time Unit	If there is a Liquidated Damages Rate entry, specify Days (auto-populated) or Hours .
Road User Cost Per Time Unit	Leave blank.

3. Special Provisions Tab

This tab is used to add placeholders for documents and pre-programmed paragraphs to be included in the proposal which address issues not covered elsewhere. Special Provisions are from General Notes and Special Notes pages in the Plan sheets and may also be based on bid items that require them. Below are the most commonly used by PSE Branch but this list is not exhaustive.

Special Provision Number	Description	Comment	Pre-programmed Paragraph or Document Placeholder
1-122	Expedite Work Order		Paragraph
1-132	Asphalt Mixtures	Use on all contracts with asphalt.	Paragraph
1-134	DGA Base	Use on all contracts with bid item code 00001.	Paragraph
1-136	DGA Base for Shoulders	Use on all contracts with bid item code 00001.	Paragraph
1-139	Slag Alternates	D9 Contracts sometimes use slag alternates.	Paragraph

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1-140	Incidental Surfacing	Use on all contracts with any amount of surfacing.	Paragraph
1-156	Asphalt Ride Quality Category B	Will be specified in the Plans.	Paragraph
1-157	Fuel and Asphalt Pay Adjustment	Use with both or either of these bid item codes 10020NS and 10030NS but never on contracts with Paving Alternates.	Paragraph
1-158	Asphalt Ride Quality Category A	Will be specified in the plans.	Paragraph
1-160	Asphalt Compaction Option A	Use on contracts with any asphalt mixtures over 1,000 tons.	Paragraph
1-165	Asphalt Compaction Option B	Use on contracts with asphalt mixtures of less than 1, 000 tons.	Paragraph
1-170	Material Transfer Vehicle (MTV)		Paragraph
1-200	Hold Award	For any Hold Award Note.	Placeholder
1-201	Special Note(s) Applicable to Project	All notes not covered elsewhere can be attached to this placeholder such as: *Tree Cutting Restrictions *Hold Award Note *Railroad notes *Proposals for Proposal-Only pavement rehab contracts	Placeholder
1-220	Liquidated Damages	If liquidated damages are different from Spec Book requirements.	Placeholder
1-556	Bridge Demolition, Renovation & Asbestos Abatement	Use on all contracts involving bridge work. If this pre-programmed paragraph is used, there should also be a Bridge Asbestos Report attached under 1-557 below.	Paragraph
1-557	Asbestos Abatement Report	Use with 1-556 to attach Asbestos Report.	Placeholder
1-920	Right of Way Note		Placeholder
1-930	Utility Clearance		Placeholder
1-931	Utility Specifications		Placeholder
1-934	Gas Line Specifications		Placeholder

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1-935	Waterline Specifications		Placeholder
1-936	Sewer Line Specifications		Placeholder
1-940	Dept. of the Army Nationwide Permit		Placeholder
1-941	Water Quality Certification		Placeholder
1-942	KPDES Storm Water Permit, BMP & NOI	BMP & NOI only required on projects with over 1 acre of disturbed area (clearing and grubbing).	Placeholder
1-949	Communicating All Promises (CAP)		Placeholder
1-99725	Pre-Bid Conference	Attach the pre-bid meeting notice to this placeholder	Placeholder
2-3 01I	Portable Changeable Message Signs	Use with corresponding bid item code 02671.	Paragraph
2-3 02E	Roadbed Stabilization at Bridge Ends		Paragraph
2-3 09T	Dry-Laid Rock Fences	Use with corresponding bid item codes 20063EN9T or 32310EC.	Paragraph
2-3 11C	Drilled Shafts	Use with all corresponding drilled shaft items.	Paragraph
2-3 11D	Rock Blasting		Paragraph
2-3 11F	Turf Mat Reinforcement	Use with corresponding bid item, all types 1-4.	Paragraph
2-3 11H	Weed Control Mat	Use with corresponding bid item 32962EN11H	Paragraph
2-3 11M	Barcodes on Permanent Signs	Use with corresponding bid item 24631EC	Paragraph
2-3 11N	Longitudinal Pavement Joint Adhesive		Paragraph
2-4 69	Embankment at Bridge End Bent Structures		Paragraph
4-100	Insurance	ALWAYS use.	Paragraph

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- Click the **Special Provisions** tab.
- Click on the **Select Provisions** button. Use the search field or the **Show first 10** feature to locate the required Special Provisions.
- Click on the line of the Provisions and then click the **Add to Proposal** Button.
- Click the **Save** button.

For information on attaching documents to the placeholders, see the **ePG Manual for PS & E**.

4. Workflow Tab

- Click the **Workflow** tab.
- In the **Workflow** drop-down menu select **PROPSAL-PROJECT-CONTRACT**.
- In the **Workflow Phase** drop-down menu select **PROPOSAL DEFINITION**.
- Click the **Save** button.

5. Section and Items

Click on **Sections and Items** in the **Quick Links** at the top of the page.

- Click the row **Actions** button.
- Select **Auto Generate Sections** on the pop-up menu.
- Click the row **Actions** button.
- Select **Assign Items to Sections** on the pop-up menu.
- Repeat this procedure for any bid items added after proposal has been created.

6. Validate Proposal

Click on **Proposal** in the **Quick Links** at the top of the page. The **General** tab view now appears.

- Click on the Row **Actions** button on project specific tool bar at the right of the screen.
- Click **Validate Proposal**.
A report is generated as a pop-up screen which lists issues that need to be addressed.
- Correct any errors found.
- Re-run the report to verify that there are no remaining issues.

7. **Generate Reports** to verify data entry accuracy of contract information, bid items and quantities.

➤ Preliminary Proposal Detail Estimate Report

- Click **Proposal** on tool bar.
- Click the row **Actions** button.
- Select **Preliminary Proposal Detail Estimate** under the **Reports**.
- Click the **Execute** button and the report is generated in a pop-up screen.
- If the tool bar is hidden, move your cursor to the bottom of the screen and an abbreviated tool bar appears. Using the buttons in the tool bar, print a hard copy

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and verify bid items and quantities match the plans. Check for supplemental descriptions. Make any necessary edits/corrections to the bid items at the project level. Re-run the report to verify your edits.

- Save PDF copy to the ProjectWise Proposal folder.

➤ Business Intelligence Reports

- Go to the **Home** page.
- Under **External Links** click on **Business Objects Reports**
- On the next screen that appears under **My Documents** in the column on the left click the + beside **Public Folders** to open the folder.
- Click the + beside **Web_Transport_PC**

i. Project Detailed Estimate Report

- On the right-hand screen choose
 - ❖ **Project Detailed Estimate**, *or*
 - ❖ **Project Detailed Estimate_Multiple** (for group jobs)
- A dummy project report appears next. Click the **Refresh** button on the lower right of the screen.
- Enter the CID in the search field beside the binoculars icon.
- Click the **Search** button.
- Highlight the search result(s) you want.
- Double-click the selection or move the CID to the right-hand search field with the **Add** arrow button.
- Click the **OK** button.
- If the tool bar is hidden, move your cursor to the top of the screen and an abbreviated tool bar appears. Using the buttons in the tool bar, print a hard copy and verify the contract data. Check for supplemental descriptions. Make any necessary edits/corrections at the project and/or proposal level. Re-run the report to verify your edits.
- Save PDF copy to the ProjectWise *Proposal* folder using the hidden tool bar buttons or onscreen.
- Close the report with the **X** on the tab to return to the main screen.

ii. Proposal Bid Items Error Check

- Select **PROJECTS AND PROPOSALS**.
- On the right-hand screen choose:
 - ❖ **Proposal Bid Items Error Check**
- A query box appears over the top of a dummy report.
- Click the **Refresh Values** button.
- Use the scroll feature to the right of the list to locate the CID you are checking. If the CID does not appear in the list, there are no associated bid item errors on that proposal.
 - Highlight the search result you want.
 - Double-click the selection or move the CID to the right-hand field with the **Add** arrow button.

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- Click the **OK** button.
- The report appears showing any issues with the bid items. In this example, the **Price Lock Flag** has not been checked and the **Bid Item Requirement** of **FIXED** has not been selected on three of the bid items which require it. Correct any issues found on the report and re-run the report to ensure that the corrections have been saved.
- Close the report with the **X** on the tab to return to the main screen.

iii. The Abbreviated Draft Project Description by Contract ID

- Select **PROJECTS AND PROPOSALS**.
- On the right-hand screen choose:
 - ❖ **The Abbreviated Draft Project Description_by_Cont_ID**
- Click the **Refresh** button on the lower right of the screen.
- Enter the CID.
- Click the Search button (binoculars icon).
- After the CID appears in the box, click on the right arrow to move it to the search field.
- Click **OK**.
- If the tool bar is hidden, move your cursor to the top of the screen and an abbreviated tool bar appears. Using the buttons in the tool bar, print a hard copy and verify the contract data. Check for supplemental descriptions. Make any necessary edits/corrections at the project and/or proposal level. Re-run the report to verify your edits.
- Save PDF copy to the ProjectWise *Proposal* folder using the hidden tool bar buttons or onscreen.

8. Attach Special Provision Notes and Permits in ePG.

Using the ePG program (see the **ePG for PS & E Manual**) attach and edit the Special Provisions to the appropriate placeholders. When complete, run a draft copy of the proposal and save an Adobe PDF copy in the ProjectWise Project folder.

9. Submit Project/Proposal to Construction Procurement

When the proposal is complete and ready for the letting, the Workflow Phase will need to be changed. **NOTE:** Once the contract has been put into the Construction Procurement workflow, you will be unable to make any edits or changes to it. Construction Procurement, however, can return it to your workflow if changes are needed after it has been submitted.

- While in the proposal, click the **Workflow Tab**.
 - Select **ADVERTISE LETTING** under the **Workflow** field drop-down menu.
 - Click the **Save** button.