

Create Proposal Checklist

When you are ready to create a proposal in wT Preconstruction, follow these steps

- Click the triangular **Action Menu** at the right side of the projects in the Project List Window, or at the right side of the blue Project banner if the project is open
- Click on “Create Proposal from Project”

Several fields will be populated with data from Project Fields

- Check the **Control Project Box**

Proposal Summary

▼ Proposal: E2016-R0 - furnishing and applying herbicides to vegetation to treat Save ?

Letting: 02220119 - 003 - Letting Date: 01/19/2022

General Select Projects... 0 changed

Project	Descr	Fed Aid Num	Control Proj	Pay Item List	Invalid P...
41021827229	CHIEFLAND MAINT. ROUTINE MAINT. CONTRACT	N/A	<input type="checkbox"/>	13 - Item List Year 2013	

- In the **Proposal ID** field replace the Financial Project Number with the Proposal Id that has been assigned the work.
- In the **Proposal Description** field, click on the magnifying glass to open the field into a larger window.
- Highlight all the text in the field and using the **Ctrl** and **C** keys copy all the text.
- Close the window
- Paste the information into the **Proposal Long Description** field using the **CTRL** and **V** keys. (Descriptive information on project limits, construction limits and intent of the project are to be added here- **See Note Below.**)

***Note:** Please be advised there may problems with apostrophes, ampersands (&), multiple spaces, and single or double quotes in text data copied into fields like the Proposal Long Description. When encountered, the User can correct directly in the field after pasting the text; keyboard the characters directly; or consider copying the text into a Notepad text file first and then from the Notepad file into Preconstruction.*

- Return to the **Proposal Description** field and click the magnifying glass again.
- If the text in the **Proposal Description** field exceeds 60 characters, edit the description so that it contains less than 60 characters.

The fields below should be populated based upon information in the Project Specifications. Questions should be directed to the Project Manager.

- In the field Proposal Type, **choose a value from the drop-down list**
- In the field Contract Type **choose a value from the drop-down list**
- In the field Contract Work Type **choose a value from the drop-down list**
- **For Alternative Bidding** - Choose the appropriate value from the drop down based upon the Project Specifications.
- Populate the **Renewable** field with a “Y” using the dropdown features in the Spec package documents a renewable option. It is expected to only be applicable to Maintenance or Traffic Operations contracts.
- Review the other proposal fields and if any need to be populated enter appropriate values.
- Click the **Save** button on the right side of the blue banner

The Proposal has been created and saved.

The need to alter the **Proposal Description** field to contain no more than 60 characters will continue for the next couple of years until both **SiteManager** and **DSS** are converted to web based modules.

One more task should be completed now.

- Click on “Sections and Items”
- Click the triangular **Action Menu** at the right side of the blue banner
- Click on “Auto Generate Sections”

Once that action is completed

- Click on “Assign Items to Sections”

To verify that there are no loose ends in your new proposal run a proposal validation.

- Click on “Proposal”
- Click the triangular **Action Menu** at the right side of the blue banner
- Under TASKS, click “Validate Proposal”

A screen will appear that says the proposal is valid, or if not, it will list the deficiencies. Correct the deficiencies.