

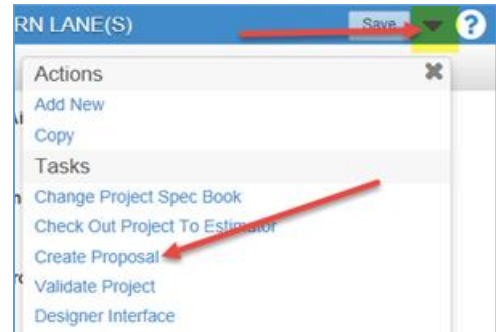
## Web-Preconstruction Check List

### PROJECT FORMULATION:

1. Run FM Interface.
2. For Transportation Development, Designer Interface and CADD output is implemented to supply Items and Categories.
3. Project Description and General Summary fields are entered, remembering asterisk items are required. The FM Nightly Interface will overwrite data that doesn't match the data in WorkProgram. (This was a two-field value in PES.)
4. Workflow/Phase is required for every project before moving to Proposal Formulation
5. Under "Categories and Items," identify categories and items, either manually from the Master Pay Item List, in small clusters or from a "Pick List." Items can also be copied from "template Projects."
6. Addressing Item Supplemental Description, keeping in mind that it is used for FPN I some cases and may be required for a particular pay item.
7. Referencing the Item Worksheet can simplify associating pricing to items for Maintenance contracts. Item Pricing can also be accomplished by clicking the Quick Tab, entitled
8. Basic Funding data, identified as either PART or NPART can be identified by opening the Fund Package Overview. The FM Nightly Interface can overwrite this data if it conflicts with WP data.
9. With the Funding Package defined and indicated, the funding is distributed to the items by clicking on the "Funding: Assign to Items" Quick Link.

10. A proposal can be created by accessing the Actions Button for the Projects and clicking on “Create Proposal” Task.

11. It’s wise to “validate” the Project before continuing with Proposal Formulation. From the Actions Button, click on “Validate Project.”



### PROPOSAL FORMULATION:

1. On the Proposal Summary page, supply all the fields with proposal data, remembering the asterisk fields must be completed with valid data. Make sure a very brief Proposal description has been entered (not to exceed 60 characters.) The Proposal Long Description field is available for all of the proposal data that wasn’t captured in the Proposal Description due to limited space.
2. Check the Projects Folder to insure the correct project is associated to the proposal. It should be displayed in the list of projects that opens when the “Projects” Tab is clicked.
3. The “Time” Folder contains the the Contract Time details. Remember Contract Time for Production Contracts is Calendar Day (CD) but Maintenance Contracts usually record Working Days (Available Days - AD).
4. Save your proposal data before leaving the Proposal Summary page. Otherwise, it will be lost.
5. Converting the Project Categories is accomplished by accessing the “Proposal Sections and Items” Quick Link and the ACTIONS button’s task called “Auto Generate Sections.”
6. When the system completes and saves this task, click on the “Assign Items to Sections” Actions Task. The system will systematically add sections to each item.

7. The Location data is automatically transferred by the system when the project is associated to the proposal.
8. Proposal validation should be run to identify any possible concerns that need to be addressed before the proposal/project package continues its lifecycle. Click on the Actions Button on Proposal Validation.
9. The Workflow/Phase at this point should be changed to "Official Estimate."
10. The Project Review team will follow, handling a final review of the proposal and project to insure everything is ready for the next phase when the proposal package is sent to Contract Administration Office (CAO) to prepare the letting. No pricing data is available at this point.

#### **LETTINGS:**

1. The Proposal Package is received by CAO and preparations are made to associate it to a letting.
2. The Proposal Package is assigned to a letting and is advertised.
3. Should it become necessary for any changes to be made to the proposal or the project, the ADDENDUM Workflow/Phase is activated so that Project Review can handle any changes or issues with the proposal or the project. When all changes had been completed, the Addendum is approved and closed so that the Workflow/Phase changes back to CAO's Advertised.
4. The CAO has several reports that they will run.
5. The bids are received electronically and evaluated so that the proposal can be awarded.