

# 1 Yearly Update List

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The Yearly Update List is produced by the Estimates Office and is used to produce a list of projects that require an update in the FM system. To produce this list, users must have rights to the module. Rights are given by the District PSEE Administrators or the FAC's.

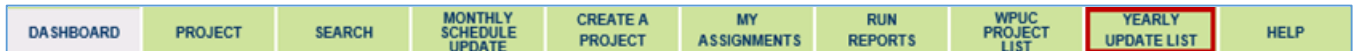


Figure 1 PSEE Top Link Menu

## 1.1 Generating the Yearly Update List

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Only the users with access to the Yearly Update List (YUL) module will be able to see the Yearly Update List tab. The list is generated based on built in logic. Please see Appendix 2 for the Yearly Update List logic.

To generate the list follow the steps below.

1. Click the “Yearly Update List” tab. The default year will be the next fiscal year.
2. Click the “Generate Yearly Estimate Update List” button
3. Enter a default Due Date (a default date is required but can be changed later).
4. Verify the Managing District is the correct District and click GO

The Yearly Update List is generated and all of the projects requiring an update are listed. The list consists of the following columns:

- Project Number
- Description
- Phase 52 Amount
- Updated Due Date
- Status
- Project Manager
- Work Mix
- FY of Letting
- Letting Date
- Contract Class

Yearly Update List menu bar

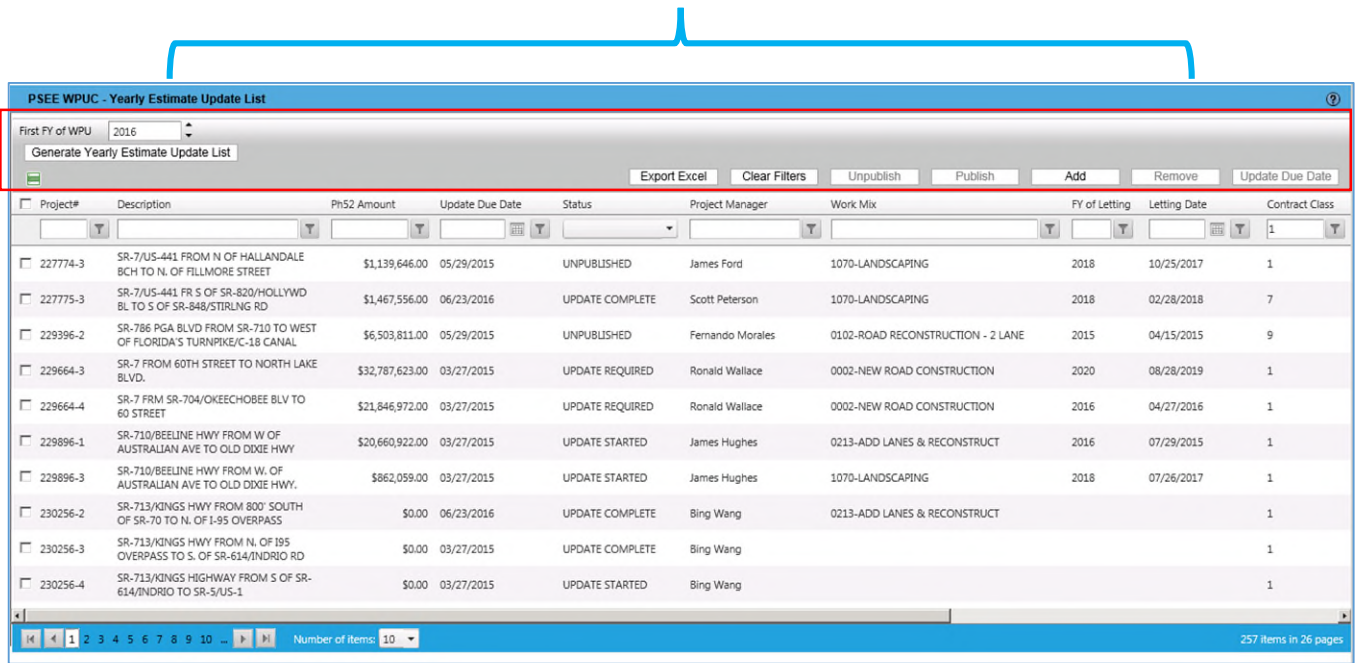


Figure 2 Yearly Update List screen

Sorting is available by clicking the column heading of any of the columns. Users can also filter by entering a filter criteria and selecting one of the filter options as shown below. To clear all filters, select the “Clear Filters” button located in the Yearly Update List menu bar ([Figure 2](#))

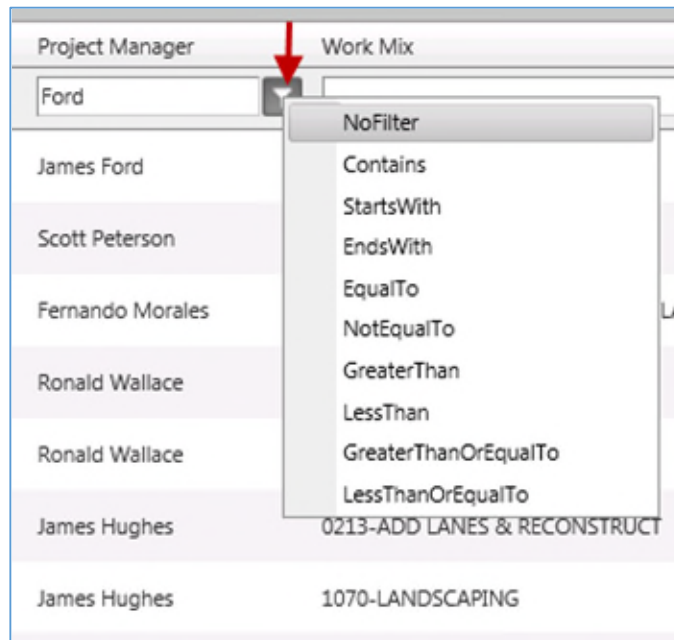



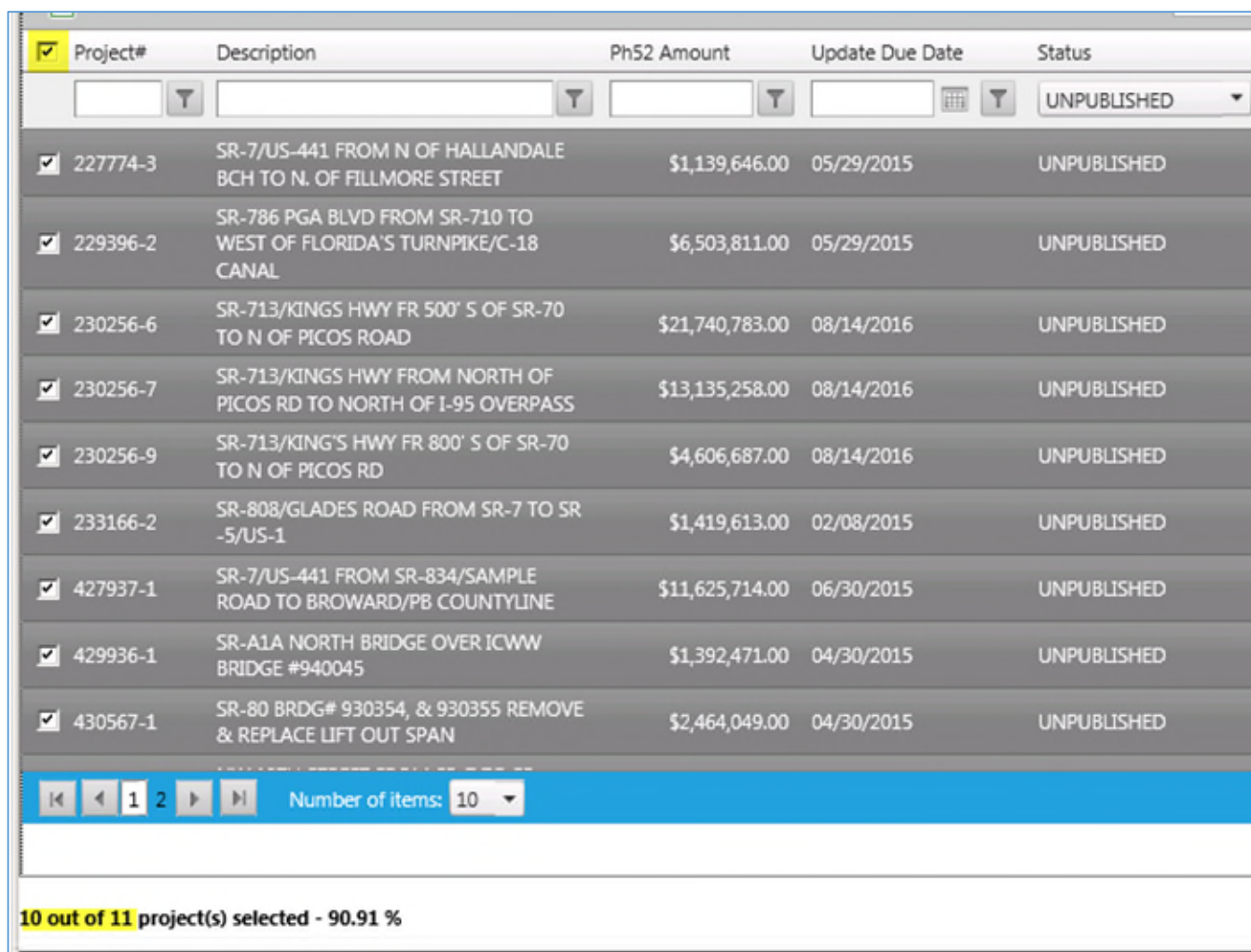
Figure 3 Filtering the Yearly Update List

## 1.1.1 Publishing and Un-publishing Projects

### 1.1.1.1 Publishing

When the list is generated all of the projects have a status of “Unpublished”. Before projects are available for updating in WPUC they must first be published. To publish a project(s) select it from the Yearly Update List. Several projects can be selected at a time by clicking in the square next to the project number. Users can also select all of the projects on the page by selecting the square next to the Project number column heading (highlighted below). At the bottom the number of projects selected is displayed.

 **Note: If you are unable to publish a project that has a status of “Unpublished” it may be that the project has an existing change request that has not been completed.**



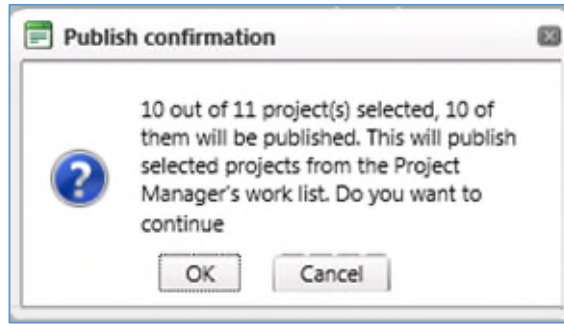
<input checked="" type="checkbox"/>	Project#	Description	Ph52 Amount	Update Due Date	Status
<input checked="" type="checkbox"/>	227774-3	SR-7/US-441 FROM N OF HALLANDALE BCH TO N. OF FILLMORE STREET	\$1,139,646.00	05/29/2015	UNPUBLISHED
<input checked="" type="checkbox"/>	229396-2	SR-786 PGA BLVD FROM SR-710 TO WEST OF FLORIDA'S TURNPIKE/C-18 CANAL	\$6,503,811.00	05/29/2015	UNPUBLISHED
<input checked="" type="checkbox"/>	230256-6	SR-713/KINGS HWY FR 500' S OF SR-70 TO N OF PICOS ROAD	\$21,740,783.00	08/14/2016	UNPUBLISHED
<input checked="" type="checkbox"/>	230256-7	SR-713/KINGS HWY FROM NORTH OF PICOS RD TO NORTH OF I-95 OVERPASS	\$13,135,258.00	08/14/2016	UNPUBLISHED
<input checked="" type="checkbox"/>	230256-9	SR-713/KING'S HWY FR 800' S OF SR-70 TO N OF PICOS RD	\$4,606,687.00	08/14/2016	UNPUBLISHED
<input checked="" type="checkbox"/>	233166-2	SR-808/GLADES ROAD FROM SR-7 TO SR-5/US-1	\$1,419,613.00	02/08/2015	UNPUBLISHED
<input checked="" type="checkbox"/>	427937-1	SR-7/US-441 FROM SR-834/SAMPLE ROAD TO BROWARD/PB COUNTYLINE	\$11,625,714.00	06/30/2015	UNPUBLISHED
<input checked="" type="checkbox"/>	429936-1	SR-A1A NORTH BRIDGE OVER ICWW BRIDGE #940045	\$1,392,471.00	04/30/2015	UNPUBLISHED
<input checked="" type="checkbox"/>	430567-1	SR-80 BRDG# 930354, & 930355 REMOVE & REPLACE LIFT OUT SPAN	\$2,464,049.00	04/30/2015	UNPUBLISHED

Number of items: 10

**10 out of 11 project(s) selected - 90.91 %**

Figure 4 Publishing projects

Once the desired projects have been selected, click the “Publish” button located on the menu bar ([Figure 2](#)). A confirmation message pops up stating the number of projects to be published. Click “OK” to continue or cancel to stop.



### 1.1.1.2 Unpublishing

In the same way a project can be published, it can also be unpublished.



**Note: Only projects with a status of "Update Required" can be unpublished.**

To unpublish a project, select the desired project(s) from the list. Multiple projects can be selected here also. Once the project(s) that will be unpublished have been click the "Unpublish" button located on the menu bar.

The screenshot shows the "PSEE WPUC - Yearly Estimate Update List" application. At the top, there's a "First FY of WPU" dropdown set to "2016" and a "Generate Yearly Estimate Update List" button. A menu bar includes "Export Excel", "Clear Filters", "Unpublish", "Publish", "Add", "Remove", and "Update Due Date". Below the menu is a table with columns: Project#, Description, Ph52 Amount, Update Due Date, Status, Project Manager, Work Mix, FY of Letting, Letting Date, and Contract Class. The "Status" column is filtered to "UPDATE REQUIRED". A dialog box titled "Unpublish confirmation" is overlaid on the table, with text: "3 out of 216 project(s) selected, 3 of them will be unpublished. This will unpublish selected projects from the Project Manager's work list. Do you want to continue?". The dialog has "OK" and "Cancel" buttons. At the bottom of the application window, it says "3 out of 216 project(s) selected - 1.39 %".

Figure 5 Unpublishing projects

### 1.1.2 Managing the list

There are other functions available within the Yearly Update List. Users can add projects that are not on the list as well as remove existing projects. Another function available is the option to update the due date. This date was set when the list was generated but can be updated on an "as needed" basis.

### 1.1.2.1 Adding projects

Users may have the need to add a project to the Yearly Update List that was not automatically added when the list was generated. Projects can be added to the Yearly Update list directly from the module. To add a project select “Add” from the menu bar. Clicking this button invokes the search screen. From here users can search for the project to be added to the list.

Select the criteria to search for a specific project. Once all of the information has been entered, click “search”.

The screenshot shows a 'Search projects' window with the following fields and options:

- Project:** [ ] - [ ]
- Active Status:** Active
- Item Segment Group:** All
- Transportation System:** All
- Projects With PSEE PM:**
- Without Permits:**
- PSEE Project Manager:** [ ]
- WP Project Manager:** [ ]
- Description / Item Seg. Comments:** [ ]
- Contract Number:** [ ]
- Local Agency:** All
- Fund Code:** All
- Phase Grouping:** All
- Fiscal Year:** From [ ] To [ ] (YYYY)
- Status:** All, 00000000 - Candidate Line Item, 00000003 - Dropped/Transferred, 00000005 - Adopted, Not Begun
- Contract Class:** All, 1 - TO BE LET, 2 - EXTERN MNGD(NOT LAP), 3 - STUDIES
- Work Mix:** All, 0002 - NEW ROAD CONSTRUCTION, 0004 - HWY-RECONSTRUCTION, 0005 - FLEXIBLE PAVEMENT RECONSTRUCT
- Search Options:** Contains (selected), Starts With, Exact
- Only Safety Projects:**
- Buttons:** Search, Cancel

Figure 6 Add a project search window

A list of projects meeting the selected criteria will be displayed, as shown in [Figure 7](#). From here, select the projects that will be added to the YUL. Enter a new due date and click the “Add to Yearly Update Project List” button. Once it is complete a confirmation message will display showing the number of projects that were added to the list.

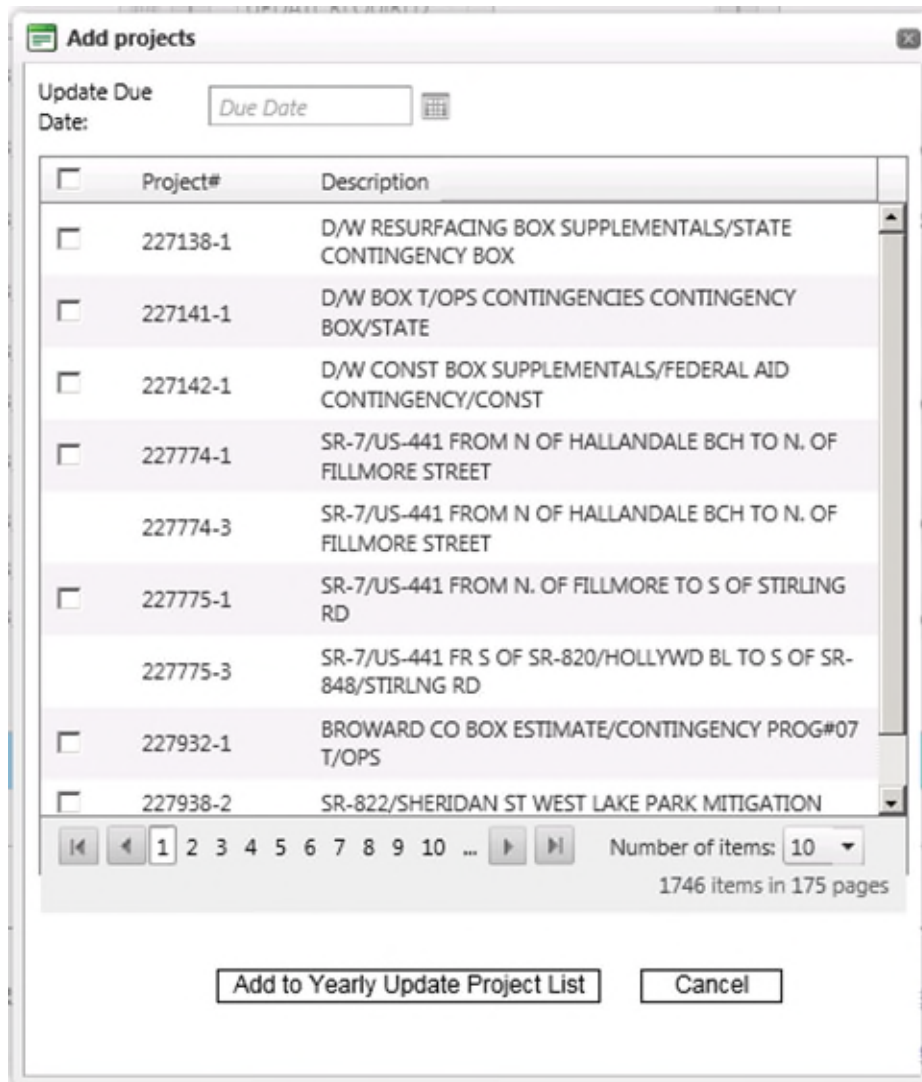


Figure 7 Add a project search results

### 1.1.2.2 Removing projects

To remove a project from the Yearly Update List select the project(s) from the list that are to be removed and click the "Remove" button from the YUL menu bar.

 **Note: Only projects with a status of "Unpublished" can be removed.**

A warning message will pop up where users can click "OK" to confirm and remove the project or "Cancel" to void the transaction and keep the project on the list.

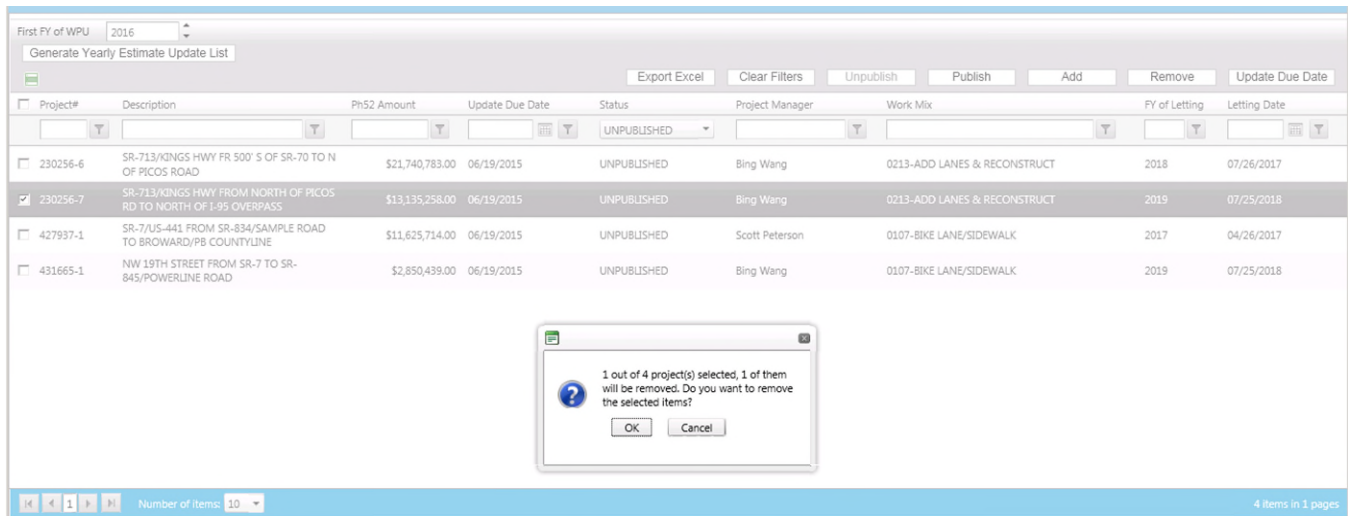
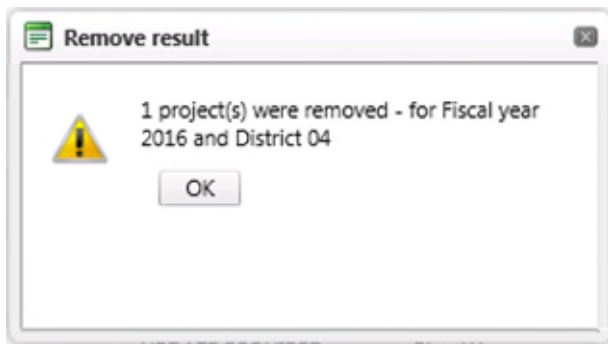


Figure 8 Remove project from YUL



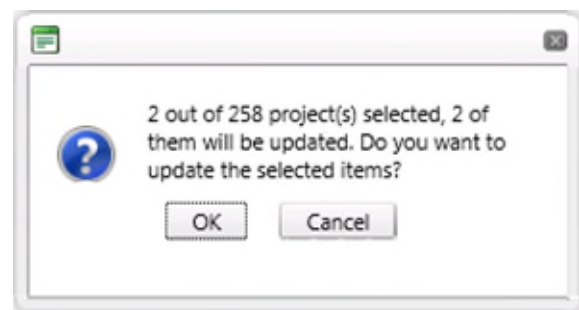
Once "OK" is clicked, a confirmation box will pop up notifying the user that the project was removed from the list. It also confirms the fiscal year for which it was removed as well as the district.

### 1.1.2.3 Updating the due date

Before projects are published, project due dates can be updated as needed. Due dates can be updated for one or more projects. Using the filter/sorting options users can narrow down the project list and select the projects that need updating.

To update the due date, select the project(s) from the list. Like adding and removing, multiple projects can be selected at once. After selecting the projects from the list, select the "Update Due Date" button from the YUL menu bar.

A pop up will appear letting users know that the due date will be changed for the selected number of projects. Click "OK" to proceed or "Cancel" to stop the command.



When "OK" is selected, a second box will appear where a new due date can be entered. The date can be either manually entered or selected from the calendar by clicking the calendar icon.

Once the desired date is entered click “OK” to complete the process. Clicking cancel will stop the process and the project’s due date will stay the same as it was.

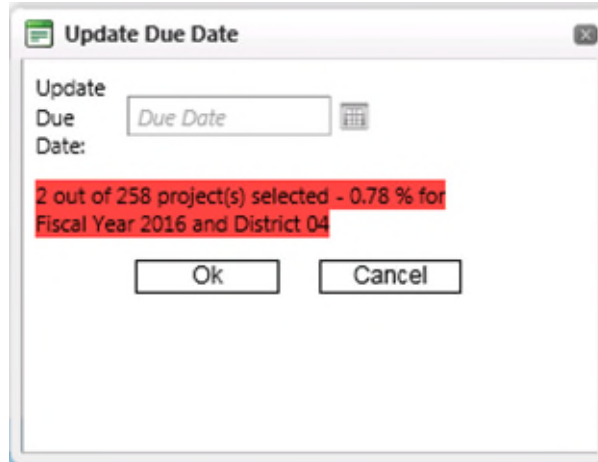


Figure 9 Updating a project due date

### 1.1.2.4 Exporting to Excel

The Yearly Update list can be exported to Excel. To export the list click the “Export Excel” button. A prompt will pop up asking to save or open the file. Select “save as” and select a location to save the file. Once the export is complete, the list can be opened in Excel.

Project#	Description	Ph52 Amount	Update Due Date	Status	Project Manager	Work Mix	FY of Letting	Letting Date	Contract Class
227138-1	D/W RESURFACING BOX SUPPLEMENTALS/STATE CONTINGENCY BOX	\$9,207,109.00	08/31/2016	UPDATE REQUIRED	Antonette Adams	0041-FUNDING ACTION	2015		8
227141-1	D/W BOX T/OPS CONTINGENCIES CONTINGENCY BOX/STATE	\$10,056.00	08/31/2016	UPDATE REQUIRED	Antonette Adams	0717-TRAFFIC CONTROL DEVICES/SYSTEM	2015		8
227142-1	D/W CONST BOX SUPPLEMENTALS/FEDERAL AID CONTINGENCY/CONST	\$55,834,603.00	08/31/2016	UPDATE REQUIRED	Antonette Adams	0041-FUNDING ACTION	2015		8
227774-1	SR-7/US-441 FROM N OF HALLANDALE BCH TO N. OF FILLMORE STREET	\$27,160,269.00	08/31/2016	UNPUBLISHED	James Ford	0213-ADD LANES & RECONSTRUCT	2014		1
227774-3	SR-7/US-441 FROM N OF HALLANDALE BCH TO N. OF FILLMORE STREET	\$1,139,646.00	05/29/2015	UNPUBLISHED	James Ford	1070-LANDSCAPING	2018	10/25/2017	1
227775-1	SR-7/US-441 FROM N. OF FILLMORE TO S OF STIRLING RD	\$25,017,601.00	08/31/2016	UNPUBLISHED	Scott Peterson	0213-ADD LANES & RECONSTRUCT	2014		9
227775-3	SR-7/US-441 FR S OF SR-820/HOLLYWD BL TO S OF SR-848/STIRLING RD	\$1,467,556.00	06/23/2016	UPDATE COMPLETE	Scott Peterson	1070-LANDSCAPING	2018	02/28/2018	7
227932-1	BROWARD CO BOX ESTIMATE/CONTINGENCY PROG#07 T/OPS	\$415,000.00	08/31/2016	UPDATE REQUIRED	Antonette Adams	0041-FUNDING ACTION	2015		8

Number of items: 10 | 263 items in 27 pages

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 Report Technical Problems to the Service Desk @ 1-866-955-4357 (HELP) or e-mail: [Service Desk](#)

Do you want to open or save YearlyList.xlsx from tlbtws.dot.state.fl.us?  
 Open Save Save as Save and open

Figure 10 Exporting YUL to Excel