TIMS

Transportation Infrastructure Management System

"Harnessing knowledge for excellence in transportation asset lifetime management & performance"

Consultant's User Guide

PMA Delivery

November 2, 2015

Alberta
Transportation

PMA Delivery

Consultants User Guide

David Hadfield

Using This Manual

This user guide has been designed to assist you in using the Program Management Application (PMA). The following tips will help you to make the best use of this guide.

Conventions

Conventions are the common formatting used in this document.

Menus, dialog boxes, user input

- Menu commands, screen names and fields are referred to in italic text. For example: "Select **Print** from the *File* menu."
- Keyboard keys, buttons and menu selections (things you click to select) are referred to in bold text, like this: "Press **Ctrl+P**".
- Links are referred to in underlined text, as in "Click the Inspections link."
- Text that you must type into a field is indicated in bold text, like this: "Type **Alberta** in the *Province* field."

Tips and Hints

Occasionally you will see Hint, Alert and See items wrapped in borders. These are designed to draw your attention to helpful or important information. Here are samples each, with an explanation of what they mean:

Hint: This is an example of a Note or Tip. It accompanies hints that help you to work more quickly or effectively.

Alert! This is an example of a Alert. It indicates a warning or caution about potential pitfalls.

See: This is a cross reference that provides additional information. *See **"Menus, dialog boxes, user input" on page ii for additional information.***

Activities

Activities give step by step instructions on how to accomplish a particular task. There are two types of activities: “How To” activities, and “Exercise” activities.

Demo/How To

A Demonstration and How To activity go hand-in-hand. Click the Demo image to run a brief simulation. The How To provides the step by step instructions about how to accomplish a particular task. It does not refer to specific data; rather it is designed to provide general instructions that could be followed any time you perform the task.

Exercise

An Exercise provides a step by step example of a task, usually using sample training data.

Revisions

Revisions have been made accordingly:

Table 0.1 Revision Schedule

Revision	Date	Description
4_00_00	June - Aug 2014	Original draft of R1 guide
	Jan 2015	Finalize
	March 2015	Approved Change Request update and screen shot
	April 2015	Tender Document Naming standard
4_02	Sept 2015	Add Checklist Chapters 15 & 16
	Sept 2015	Chapter 9 update ‘Bid Item Covers Mobilization, Site Occ. etc’ Alert. Chap 5 Search Tenders, Chap 17 Tenders Delivered to Region.
	Oct 2015	‘C’ Estimate Alert added to Chap 9 Complete Tender Bid Items
	Nov 2015	Approval In Principle Acceptance for CR pg 23-33

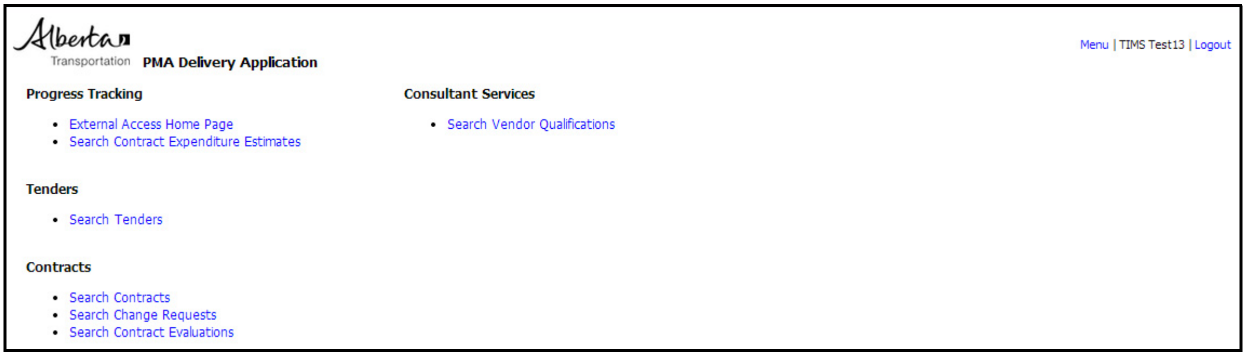
Getting Help with PMA Delivery

The following covers various methods of getting help.

Help on the Web

The first place to go if you have questions about or problems with PMA Delivery, is to the Help link available on the Main Menu.

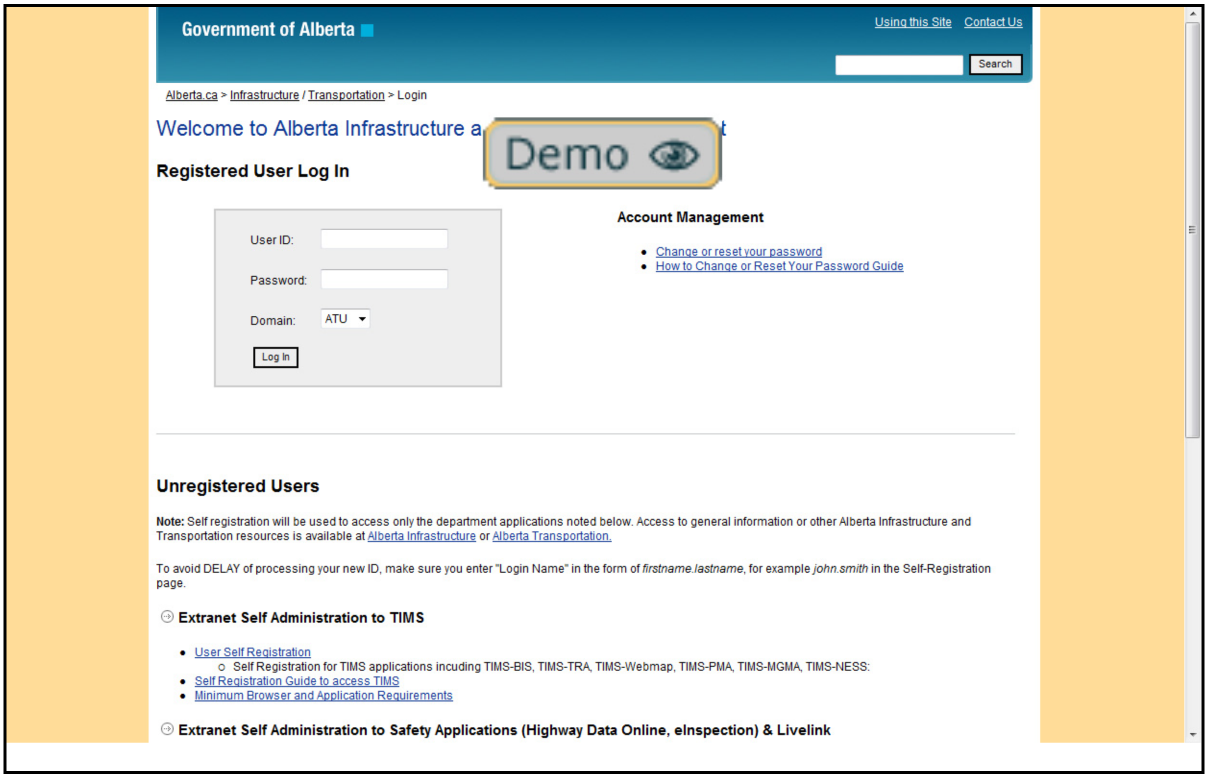
Figure 0.1 PMA Delivery Main Menu



The Help page contains information about PMA Delivery, links to user guides and other reference materials.

The TIMS Knowledge Transfer group, who maintain the support system, welcome feedback and suggestions on how to improve the resources offered through this site.

Demo 0.1 Access the PMA Delivery Webpage



How To

1. Open *Internet Explorer*.
2. Navigate to the Alberta Transportation website http://www.transportation.alberta.ca/index.htm
3. Click on **Technical Resources** link.
4. On the *Technical Resources* page click the **EXTRANET** link.
5. On the *Extranet Login* screen enter your User ID and Password.
6. Click the **Log In** button.
7. On the *Published PRODUCTION Applications* screen click the **PMA Delivery** link.

Personal Help

If you cannot find the answer you need on the application's support page, you have three options for getting personal assistance. These are:

- Assistance with technical problems (see below)
- Help using the application (see next page)
- Answers to questions about the data stored in PMA Delivery (see next page).

Technical Problems with PMA Delivery

The GOA Service Desk can provide help with technical problems. You can contact them at:

1-888-427-1462

GOA.ServiceDesk@gov.ab.ca

7:00 a.m. to 6:00 p.m.

Monday to Friday

Technical problems include:

- Application failure or error messages
- Slow response times
- Citrix access problems
- NT Password resets
- Network problems, such as domain or service availability error messages
- Anything to do with the operating system, desktop software, or workstation setup
- E-mail problems
- The 'blue screen of death"

When you place a support call to the GOA Service Desk, your problem will be logged as a trouble ticket. Be sure to write down the ticket number - you will need it if you want to follow up with the help desk later.

The ticket will be assigned to someone with the appropriate expertise, who will call you to gather further information, provide a solution or discuss a plan for resolution of the issue.

Help using the Application

For help using PMA Delivery, contact the Project Administrator in the region.

Concerns about PMA Data

Data input and accuracy in TIMS applications is the responsibility of the applications' Business Sponsor and Data Steward(s) The first line of support for external users is the regional project administrator(s).

If data in PMA seems to be incorrect or missing, please contact:

Table 0.2 PMA Delivery Contacts List

Position	Name	Phone
PMA Business Sponsor	Robert Quinton	780 427-1581
Security and Vendor Setup	Paul Zabala	780 427-6909
Training Issues	David Hadfield	780 422-2199
General Concerns	Sylvia de Bruyn	780 415-1390

Suggestions for Improvement to PMA Delivery

If you have a suggestion that would improve PMA Delivery, please forward your comments/suggestions to Robert Quinton at robert.quinton@gov.ab.ca. Your suggestions will be evaluated and may be implemented in a future release.

Program Management Application

Table of Contents

Program Management Application

Table of Figures & Demonstrations

Chapter 1: Consultant’s User Guide Introduction

The purpose of the Consultants User Guide is to document the processes of; submitting expenditure estimates, entering tenders, and submitting contract evaluations in PMA Delivery. This chapter provides an overview of PMA Delivery and the processes covered in this guide. A general introduction of PMA Delivery is also covered along with tips on navigation and searching techniques.

Topics in Chapter:

1. External Access Background
2. General Processes
3. PMA Delivery Navigation
4. Search Techniques

External Access Background

The Transportation Infrastructure Management System (TIMS) is a collection of web-based applications developed for and used by Alberta Transportation. The Program Management Application - Delivery (PMA Delivery) is a TIMS application that provides integrated functionality to support the tracking, planning and delivery of work under the various provincial highway infrastructure programs. The purpose of this guide is to document the processes available to external users working in PMA Delivery.

One of the overriding principles embedded in each of the TIMS applications is that: 'the responsibility of data entry should rest with the appropriate parties - those who created the data'. With this in mind it was quickly realized during the development of the Tender screens in PMA - Delivery that a new application would be required. One that would allow external users, in this case engineering consultants, access to specific areas and specific data within the application. For the purpose (in this initial example) of entering the Tender into PMA - Delivery. Engineering consulting companies are contracted to create, among other things, a Tender: therefore, they should also be responsible for entering the Tender into PMA - Delivery. People with external access can ONLY access information specific to the organization of which they are employed. For example, an engineer can only see the expenditure estimates, tenders and contracts of their organization. They have no ability to even view contracts between Alberta Transportation and another engineering company.

Security Role Clarification

The TIMS External Access Security Application (EASA) has two levels of security. First the ability to access the required application needs to be granted to each external user. Second a role needs to be assigned to the user. The security roles available to external users are:

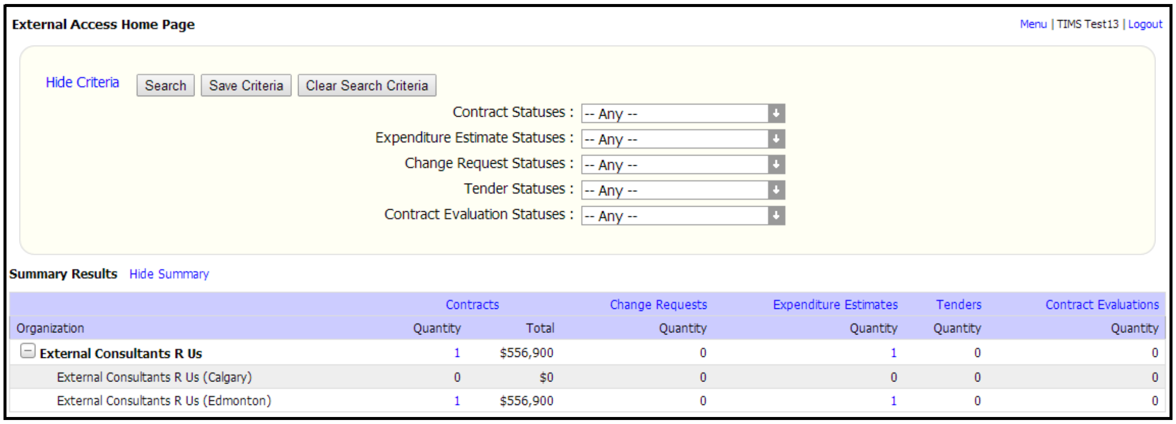
- External Security Administration
- External View
- External Data Entry
- External Submit

The main purpose of this document is to provide assistance to users with the External Data Entry and/or External Submit roles. These people have the rights to alter data in PMA Delivery and to submit these changes to Alberta Transportation representatives (i.e. Construction Manager, Bridge Manager).

Organization vs. Org Unit

The TIMS Security Application has a predefined structure. The structure starts at the largest entity: an Organization or Company. A company may have one or more offices. In TIMS each of these offices is considered an Organization Unit. Within an office there are employees. Due to this structure, PMA Delivery is able to list all employees of the Organization or limit the number of employees: by selecting a specific Organization Unit (office). In Figure 1.1 below, contracts are totaled at the organization level and broken down by organization unit.

Figure 1.1 Organization Unit Listing



General Processes

The following list of chapters hint at the areas of PMA Delivery that external users have access to. Engineering consultants are responsible for entering the monthly Expenditure Estimates, the Tenders, and Contract Evaluations into PMA Delivery.

1. Consultants Introduction
2. External Access Home Page
3. Contract Expenditure Estimates
4. View Vendor Qualifications
5. Search Tenders
6. Create Tender Package
7. Maintain Tender Screen
8. Create Bid Item
9. Maintain Tender Bid Item Design Screen
10. Create Tender Bid Item
11. Maintain UPS Section Screen
12. Create Tender Unit Price Schedule
13. Create Tender Project
14. Create Tender Document
15. Tender Package Delivered to Region
16. Contract Evaluation - Search
17. Contract Evaluation - Contract Default Evaluation Criteria
18. Contract Evaluation - Maintain Evaluation Screen
19. Contract Evaluation - Create Evaluation
20. External Access

PMA Delivery Navigation

Once the external user has successfully logged into PMA Delivery, getting around within the application should be fairly straight forward. The PMA Delivery Main Menu has links that will allow the user to access specific items (i.e. expenditure estimates, tenders, contracts, etc.). Actually there are two methods of accessing items: the PMA Delivery Main Menu and the External Access Home Page.

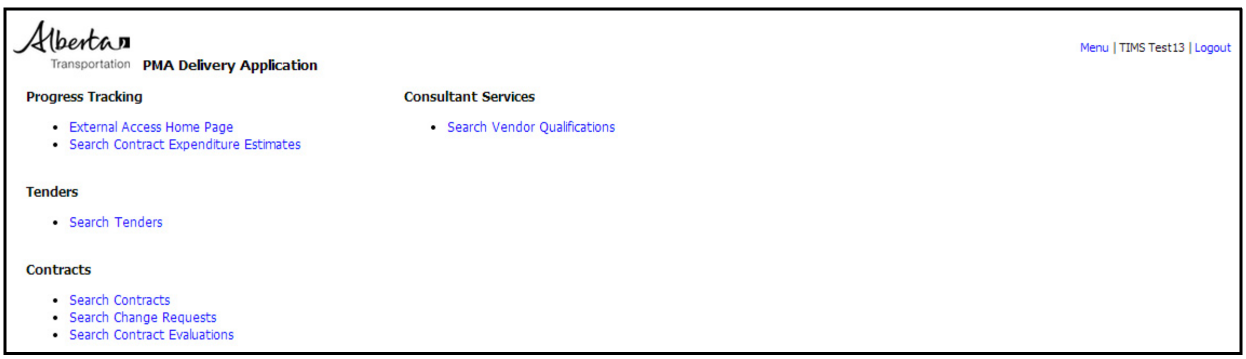
PMA Delivery Main Menu

The following links are available to external users on the PMA Delivery Main Menu:

- Contract Expenditure Estimates
- Tenders
- Contracts
- Contract Change Requests
- Contract Evaluations
- Vendor Qualifications

Each link provides search criteria that should help the user find the items of interest (i.e. all 'In Progress' tenders, 'Active' contracts for the Red Deer office, etc.).

Figure 1.2 PMA Delivery Main Menu



External Access Home Page

The External Access Home Page provides search capabilities to the external user such that items (expenditure estimates, tenders, contracts, contract evaluations) can be listed by Organization Unit (office). Clicking on a Quantity (> 0) will list the records corresponding to column and quantity amount selected (i.e. 1 Tender, 3 Contracts, etc.). The Column and Organization combination determines which records will be listed.

Figure 1.3 External Access Home Page

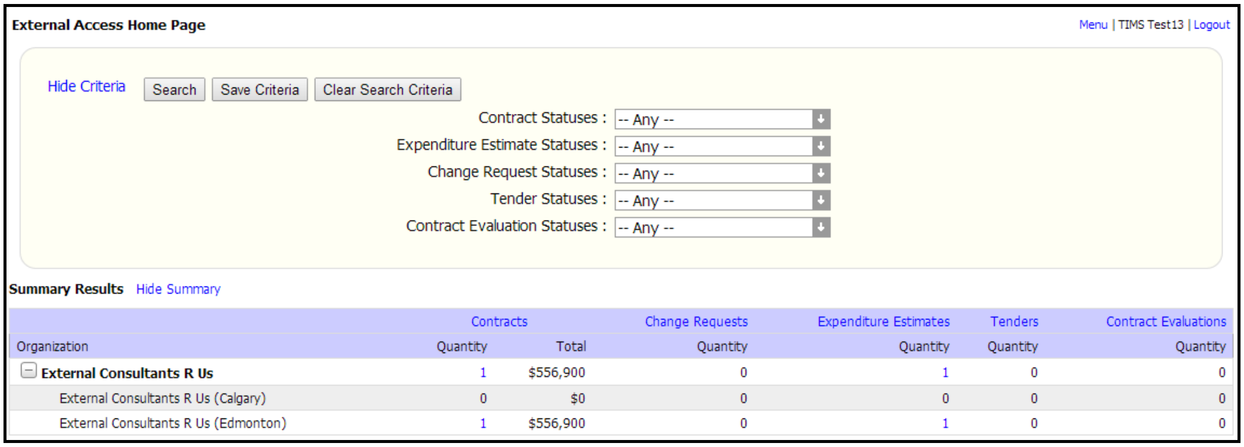


Table 1.1 External Access Home Page - field definitions

Field	Description
Search (button)	Performs the search using the criteria selected.
Save Criteria (button)	Saves the current criteria settings for use on subsequent logins.
Clear Search Criteria (button)	Reset all search criteria to 'Any'.
Contract Statuses	Drop down list used to specify one or more contract status' (Pending, Active, Completed).
Expenditure Estimate Statuses	Drop down list used to specify one or more expenditure estimate status' (Created but not submitted, Submitted for Approval, Approved by Region, Validated by Programming, Returned by Region).
Change Request Statuses	Drop down list used to specify one or more change request status' (In Progress, Submitted, Approved, Rejected, Approved in Principle, Cancelled).
Tender Statuses	Drop down used to specify one or more tender status' (Tender has been created in Draft Form, Region is Reviewing Tender, Tender Returned, etc.)
Contract Evaluation Statuses	Drop down used to specify one or more Evaluation status' (In Progress, Submitted, Rejected, Completed, Under Appeal, Appeal Approved, Appeal Rejected).

Table 1.1 External Access Home Page - field definitions

Field	Description
Show/Hide Summary	Display or hide the results of the search.
Contracts	Display the Total number of Contracts and the Total dollar value (sum of all contract upset limits).
Change Requests	Display the Total number of Change Requests.
Expenditure Estimates	Display the Total number of Expenditure Estimates
Tenders	Display the Total number of Tenders
Contract Evaluations	Display the Total number of Contract Evaluations

Search Techniques

Searching usually involves the use of criteria so that the results are limited to the records of interest. This section covers using the different ways that criteria are presented. The following list provides the criteria types covered in the remaining pages of this chapter:

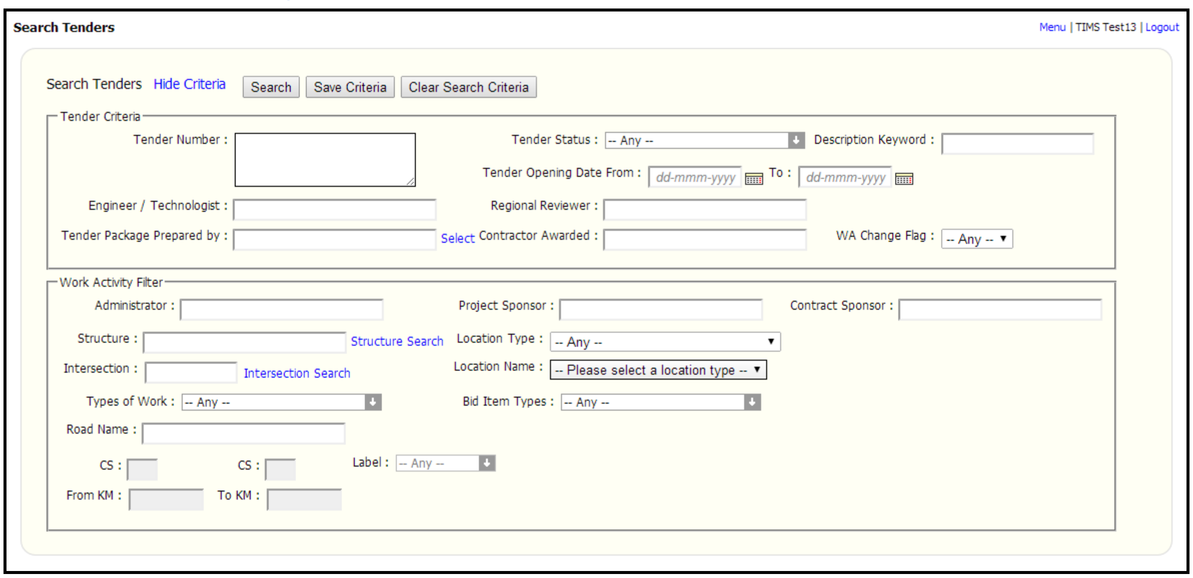
1. Date Fields
2. Drop Down List with Check Boxes
3. Single Choice Drop Down List
4. Auto-Suggest List

Alert! **All criteria** set by the user, must be satisfied for records to be listed in the results.

Hint: When using multiple criteria, be careful that one criteria does not conflict with another.

This section will also cover saving criteria and a few of the error messages that may be encountered.

Figure 1.4 Search Tender screen – blank criteria

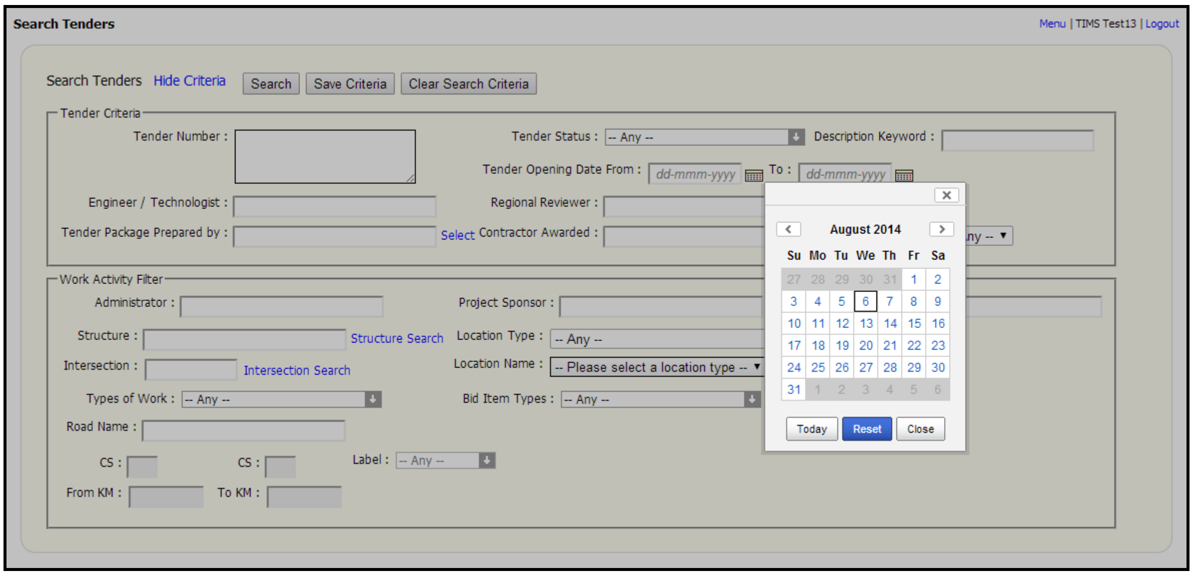


Date Fields

Dates for criteria can be typed manually into the field or selected by using the calendar button. The calendar window can be used to quickly move years into the past or future.

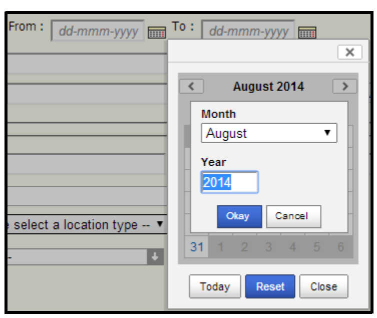
Alert! All dates must be in dd-mmm-yyyy format (i.e. 12-dec-2014), including the dashes.

Figure 1.5 Search by Date – Calendar window

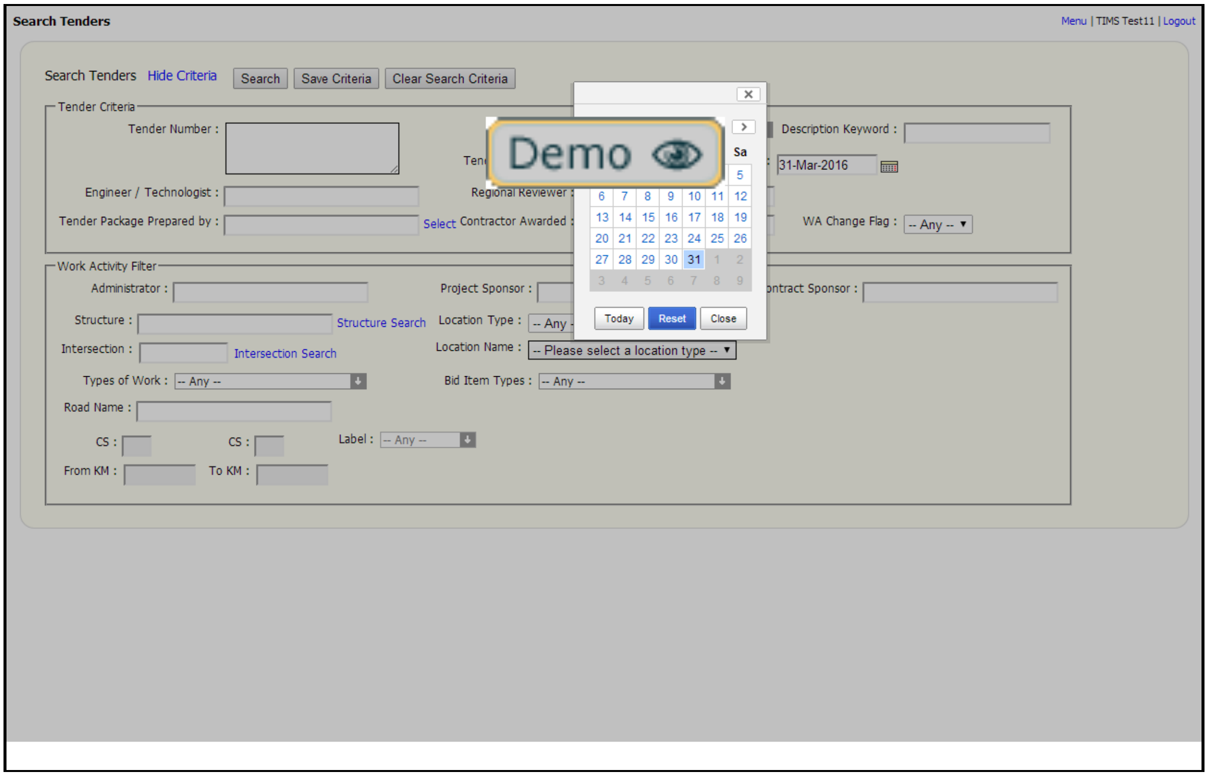


Clicking on the *Month Year* (i.e. August 2014) will open another window that will allow the user to change the Year and/or Month. The final step is to click on the day in the calendar window.

Figure 1.6 Search by Date – Change Month/Year



Demo 1.1 Enter a Date



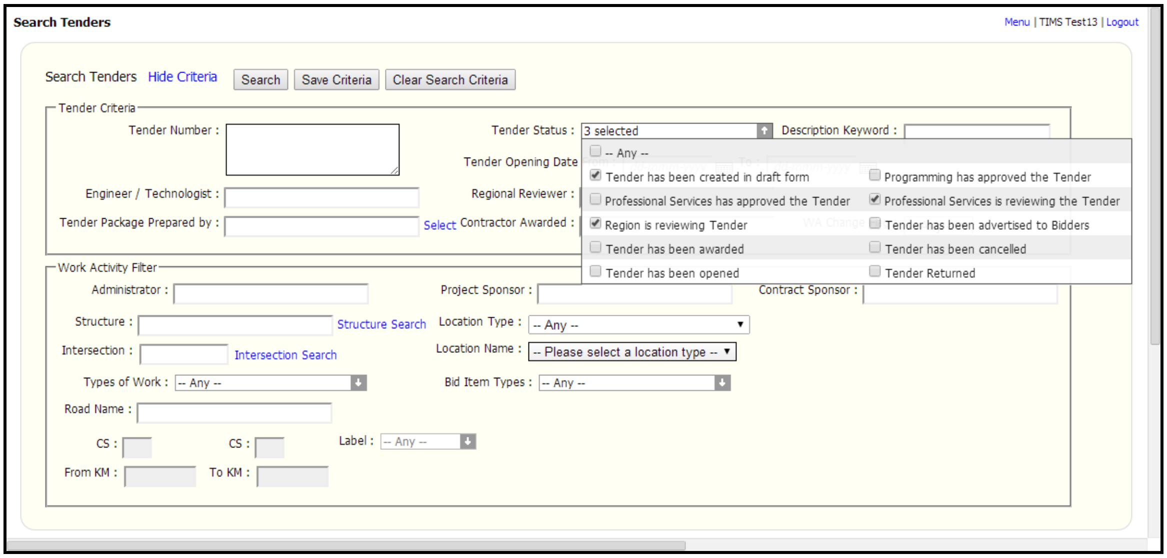
How To

1. Select the **Calendar** button.
2. Select the **Month Year** button.
3. Type the required **Year** and select the required **Month**.
4. Click the **Okay** button.
5. Click on the required **Day**.

Drop Down List with Check Boxes

Drop down lists with a white arrow on a grey background button, will allow the user to make one or more selections by checking boxes beside each value. In Figure 1.7 below, the Tender Status field is an example of a drop down allowing multiple selections.

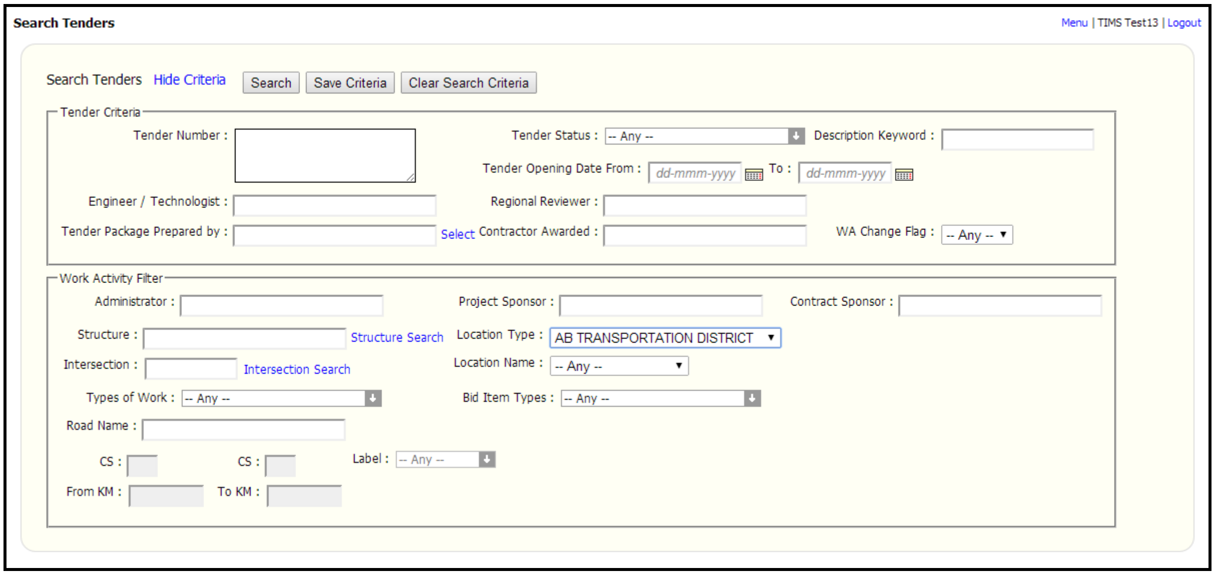
Figure 1.7 Search Drop Down – Check Boxes



Single Choice Drop Down

Drop down lists with a black arrow on a white background button will only allow the user to make one choice. In Figure 1.8 below, the Location Type is an example of a drop down allowing only one selection.

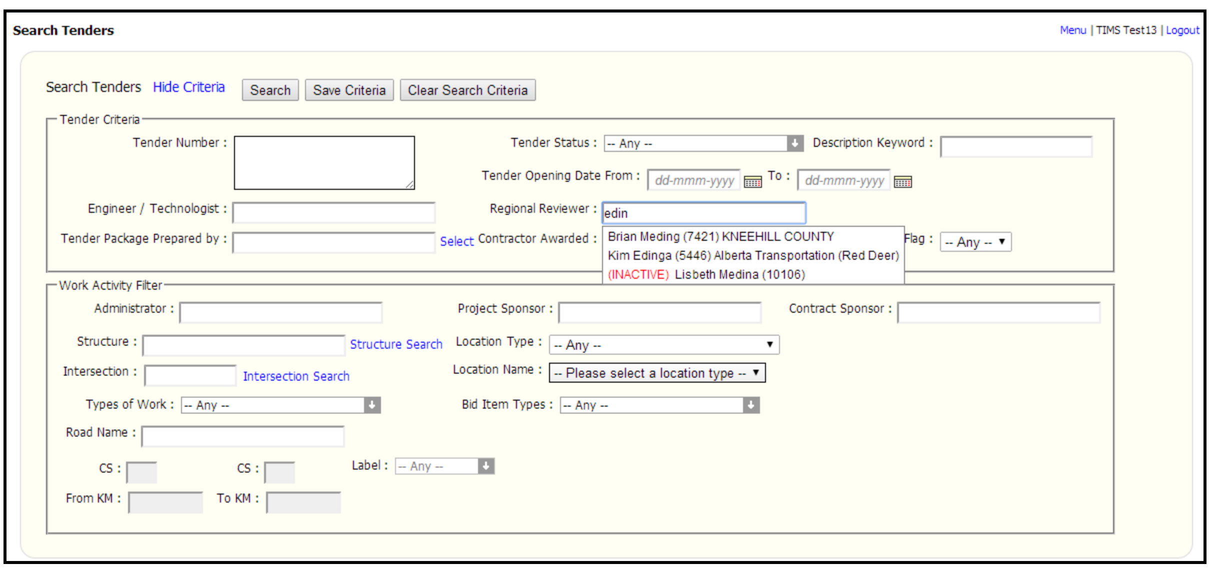
Figure 1.8 Search Drop Down – Single Choice



Auto-Suggest List

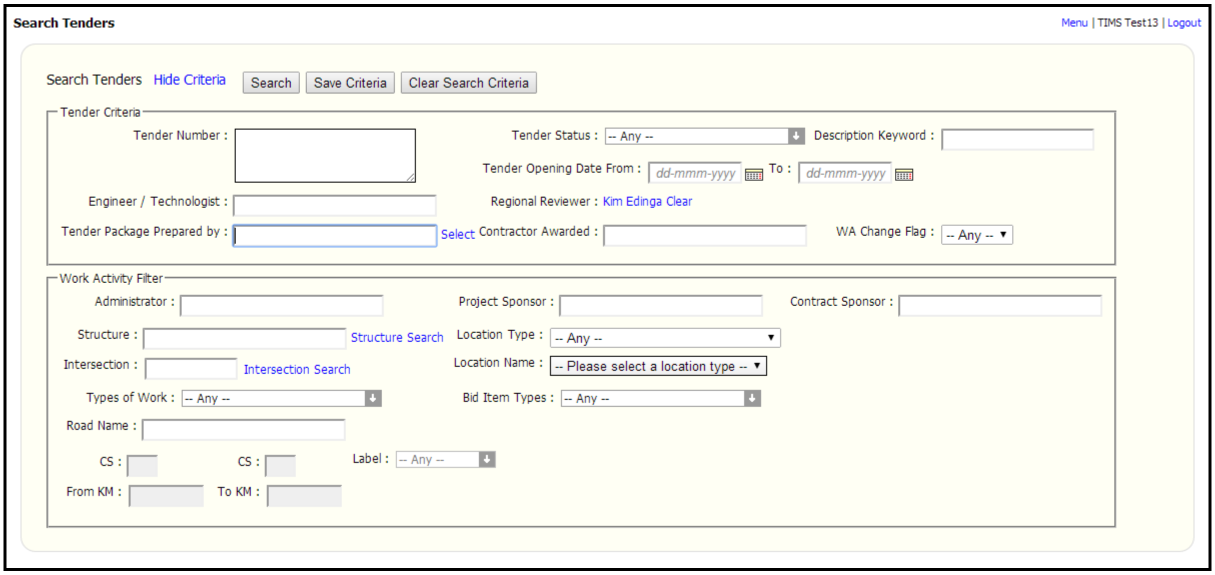
When entering an organization or individual to use as criteria, begin by typing letters in the name. A list will appear matching the letters entered. Continue typing more characters until the name appears in the list. Click on the name to make the final selection.

Figure 1.9 Search Drop Down – Auto-Suggest



Hint: Sometimes searching by last name returns results faster than the first name.

Figure 1.10 Search Drop Down – Auto-Suggest selected

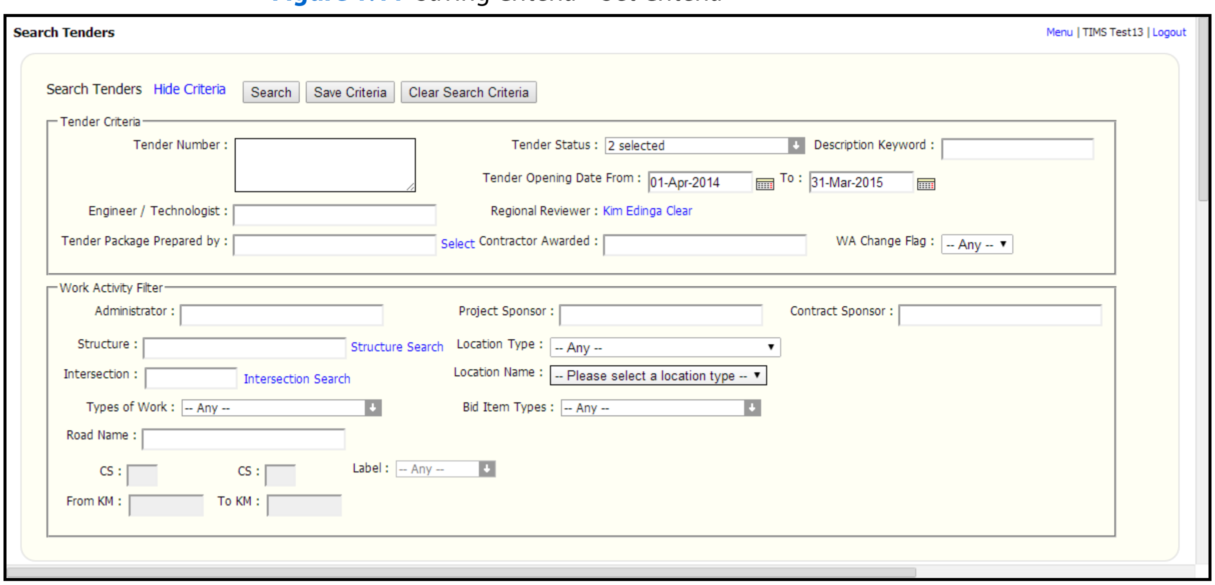


Saving Criteria

When the same criteria is used repeatedly to perform the same search on the same screen: it may be worth saving the criteria instead of recreating it for every search. The Save Criteria button will allow this to happen.

Hint: Only one set of criteria can be saved per search screen.

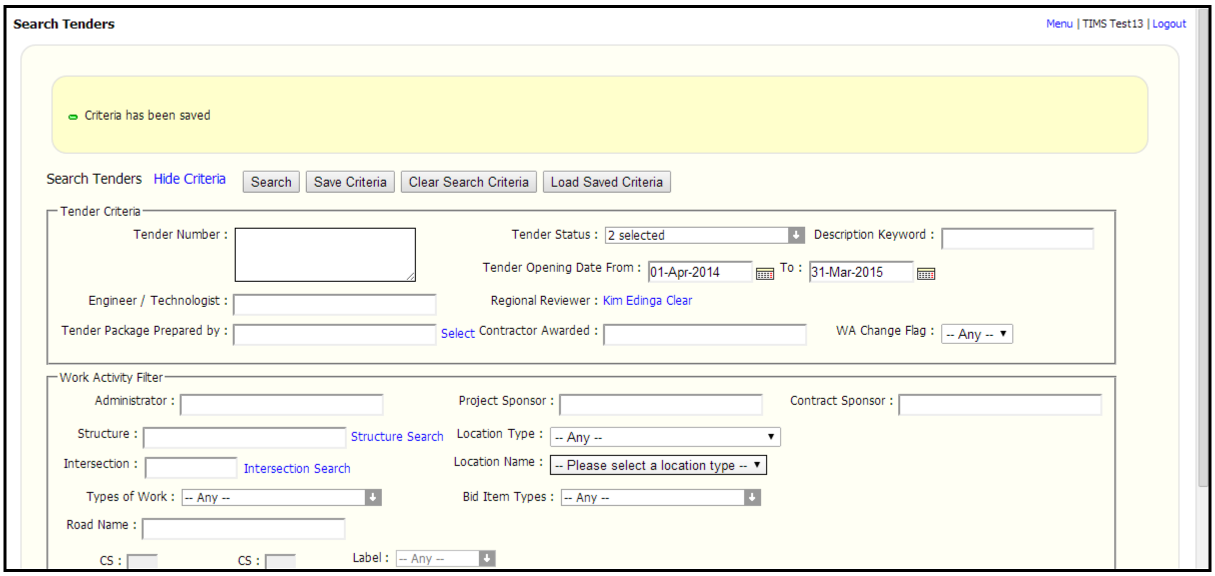
Figure 1.11 Saving Criteria – Set Criteria



Once the criteria is saved, the criteria will be automatically loaded on the screen every time the user returns. An additional button appears on the search screen: Load Saved Criteria. The Load Saved Criteria button is used to reload the saved criteria. In the event that criteria is changed and a search performed, the user can quickly revert back to the original criteria.

See: *See* ***"Home Page Search" on page 2-3 for additional information.***

Figure 1.12 Saving Criteria – Criteria Saved



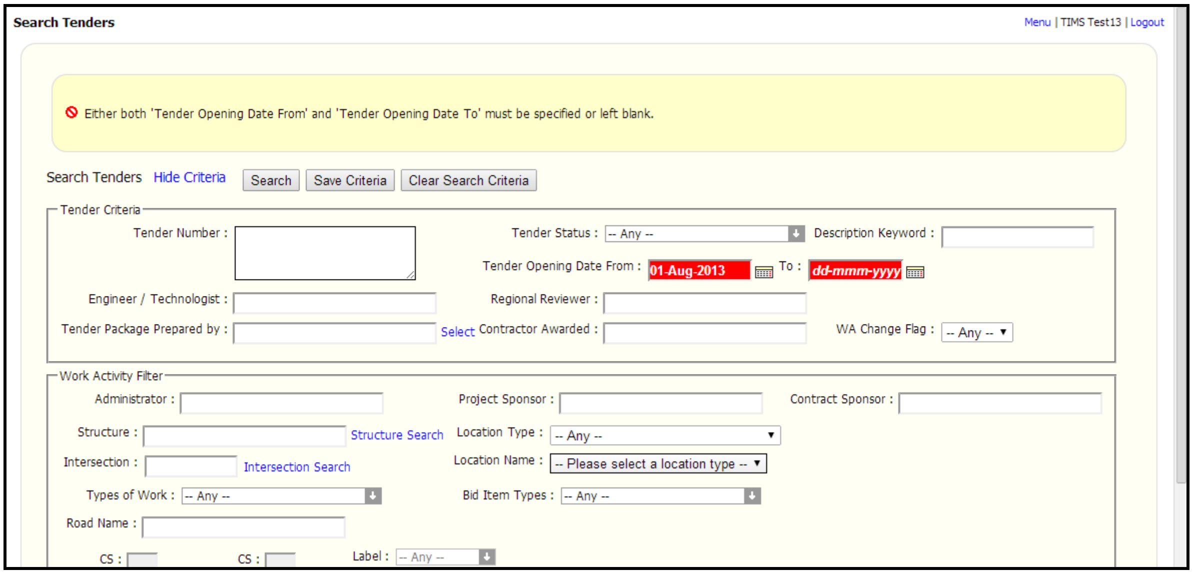
To edit the saved criteria, the user makes the appropriate criteria changes on the search screen and selects the Save Criteria button to overwrite the saved criteria.

Hint: Using the Clear Search Criteria button and then the Save Criteria button will in effect remove the Saved Criteria.

Error Messages

When criteria is entered incorrectly, the application will display error messages near the top of the screen with text indicating what the error is caused by. The user can make the changes and try searching again. In Figure 1.13 below, the reason for the error message is provided and the field(s) in error are highlighted in red.

Figure 1.13 Search Error Message – Between Dates



Chapter 2: External Access Home Page

The PMA Delivery Main Menu has a link specifically for External Users: External Access Home Page. This page will list the Contracts, Tenders, etc. associated with the Organization the user is employed by.

Topics in Chapter:

1. External Access Home Page Background
2. External Access Home Page Search
3. Access Contracts and Tenders

External Access Home Page Background

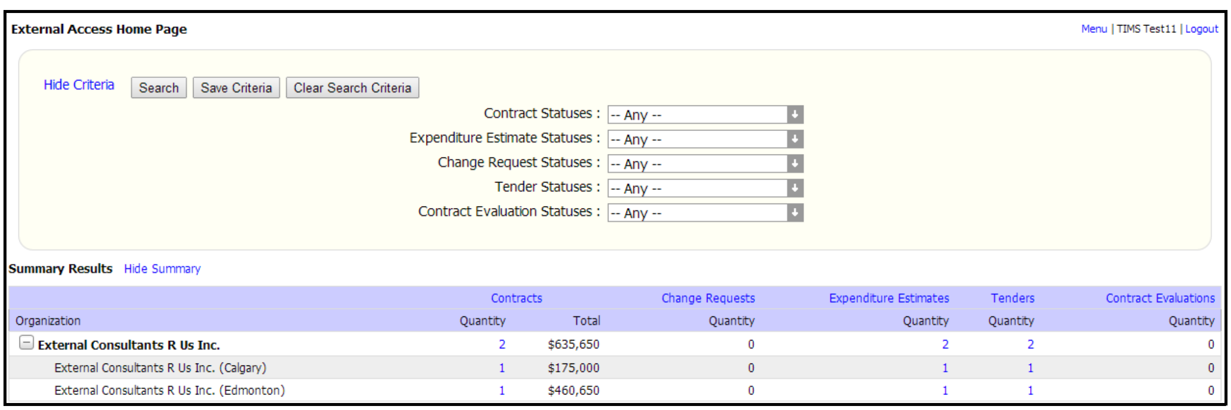
The External Access Home Page is a screen designed for External Consultants. The screen will list:

- Contracts
- Change Requests
- Expenditure Estimates
- Tenders
- Contract Evaluations

The items listed will only be for the Organization that the user is employed by. Clicking on any of the number values will display a list of matching items. The list will display further information appropriate for the column selected. For example, clicking on a number in the contract column will list contracts. Including the contract ID, Type, Status, Description etc. Clicking on any of the IDs (Contract ID, Change Request ID, Tender ID) will take the user to the relevant screen. For example, clicking on a contract number will open the Maintain Contract screen in the same window.

Alert! Be careful not to use the Internet Back button. To return to the Home Page, select the Menu link (upper right corner) and click the External Access Home Page link.

Figure 2.1 External Access Home Page screen

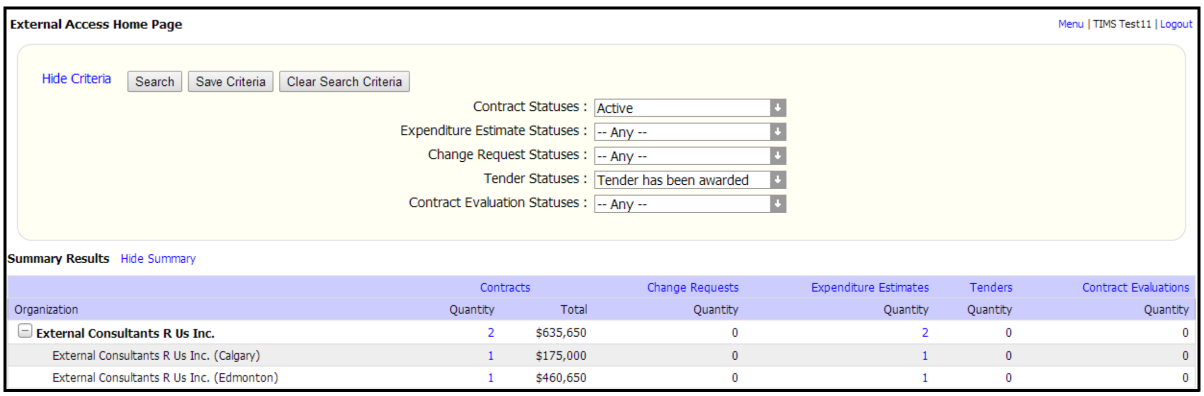


Home Page Search

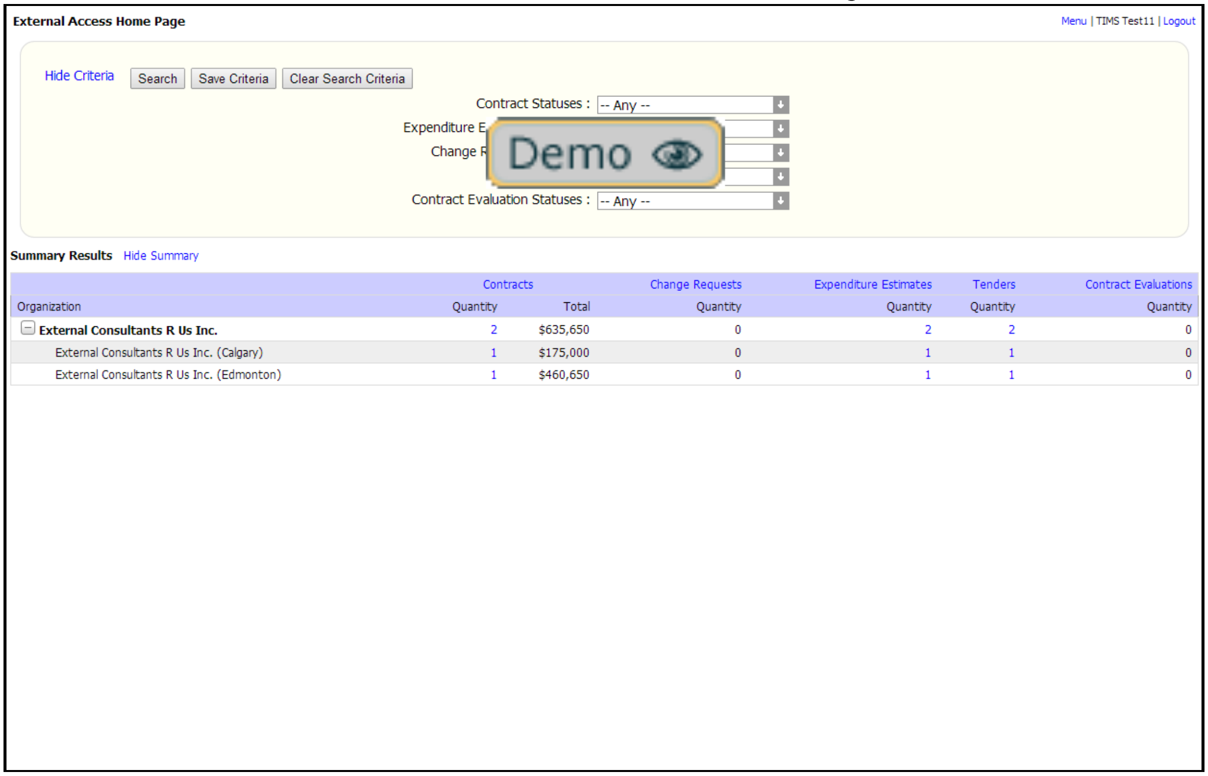
The External Access Home Page screen lists the items for the users organization by default. If necessary the user can use the criteria fields available to reduce the number of records displayed.

The criteria fields will impact the values for the matching column. The values/results displayed in each column are independent of any other columns. For example, in Figure 2.2 below one criteria is searching for Active contracts while the other is looking for Awarded Tenders. The contracts and tenders could have absolutely nothing in common other than they are associated with External Consultants R Us Inc.

Figure 2.2 Search External Access Home Page screen - search example



Demo 2.1 Access & Search External Access Home Page

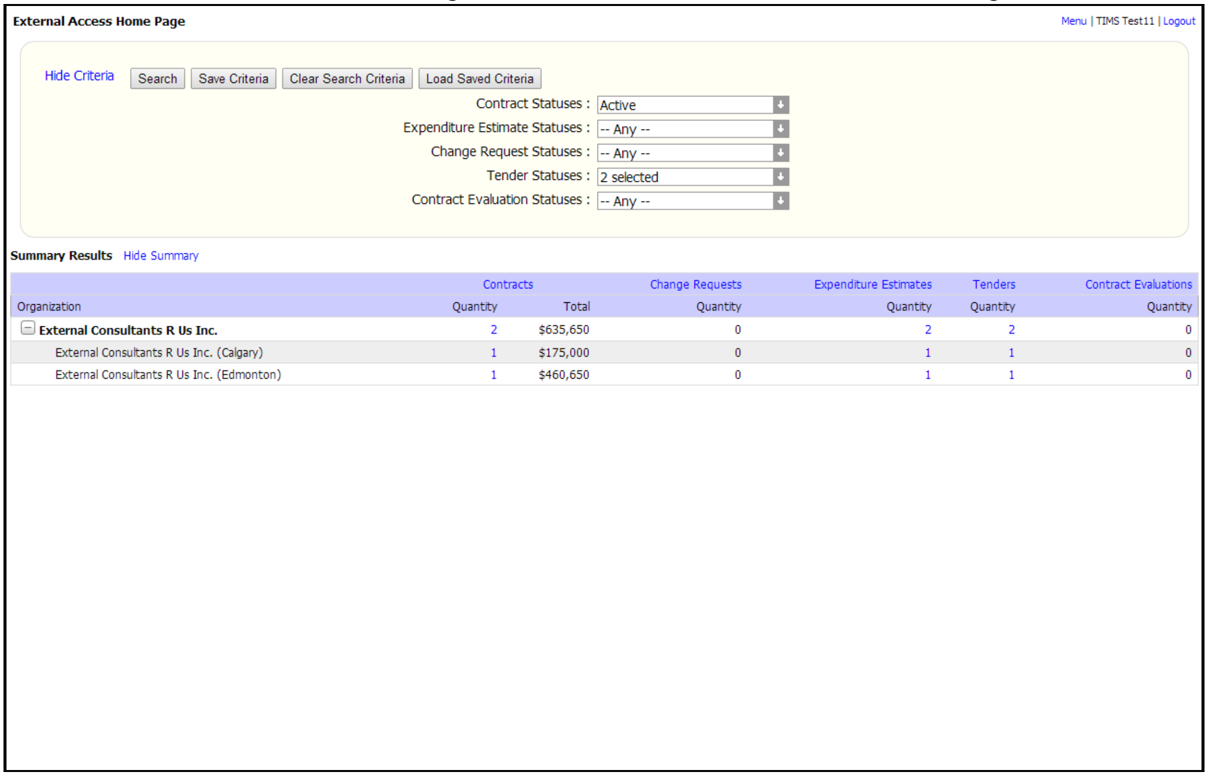


How To

1. From the *Main Menu* click on **External Access Home Page**.
2. From the *External Access Home Page* screen enter criteria to display the required items (i.e. contracts, tenders, expenditure estimates).
3. Click the **Search** button.

The External Access Home Page screen lists the items for the users' organization by default. If necessary, the user can use the criteria field(s) available to reduce the number of records displayed.

Demo 2.2 Saving Search Criteria on the External Access Home Page



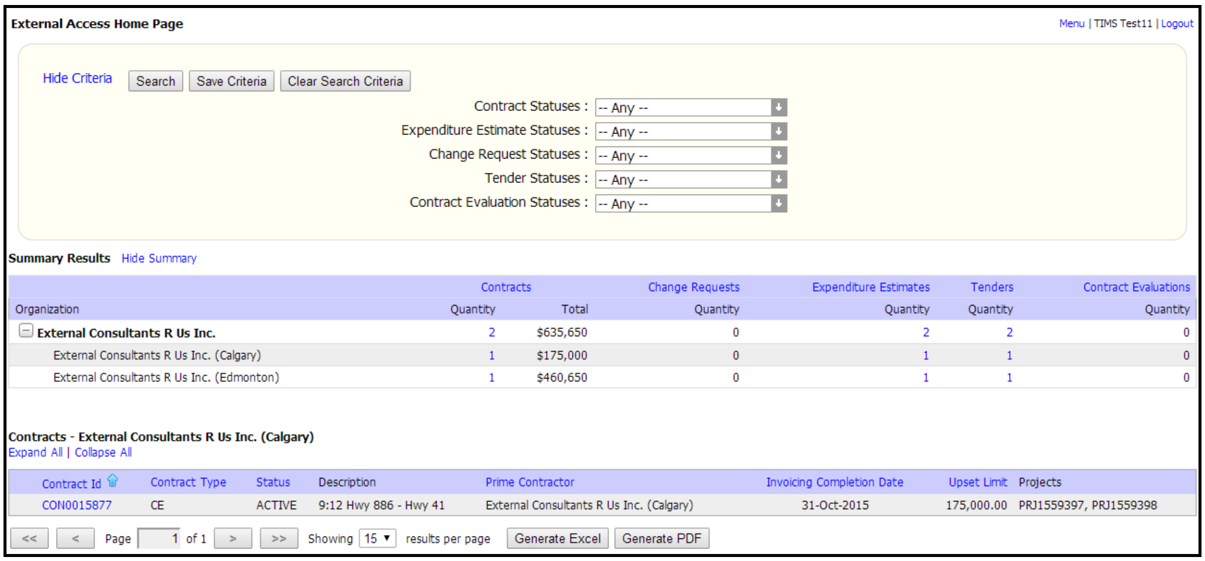
How To

1. From the *External Access Home Page* screen enter criteria to display the required items (i.e. contracts, tenders, expenditure estimates).
2. Select the **Search** button.
3. If the search results are as anticipated, select the **Save Search** button. Other wise adjust the criteria fields as necessary.

Access Contracts and Tenders

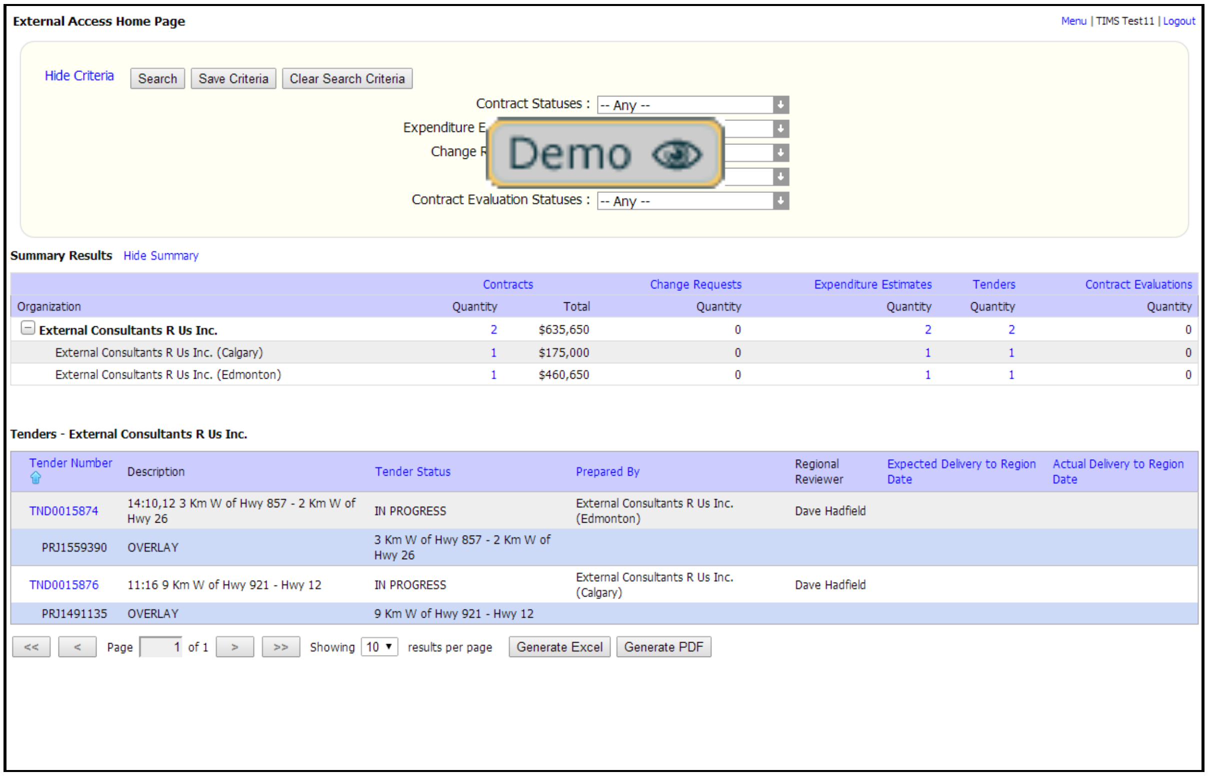
The External Access Home Page screen displays numeric values (when the records exist) as clickable links. Selecting a value will display the corresponding records at the bottom of the screen. The added records provide more information specific to the column the value is in (i.e. contracts, change requests, expenditure estimates, etc.). The added records also provide access to the individual record. For example, selecting a value in the contract column will list contract records. Selecting a contract ID will display the Maintain Contract screen with the contract displayed.

Figure 2.3 External Access Home Page screen - item listing



The demonstration below provides an example of accessing contract and tender from the External Access Home Page. The same process can be applied to Change Requests, Expenditure Estimates, and Contract Evaluations.

Demo 2.3 Access Contract and Tender records



How To

1. From the *External Access Home Page* click on a numeric value in a column.
2. From the list of records displayed, click on an ID (contract id, tender id).

Chapter 3: Contract Expenditure Estimates

Progress reporting includes Expenditure Estimates. PMA-Delivery includes the entry and maintenance of Expenditure Estimates.

Topics in Chapter:

1. Contract Expenditure Estimates Background
2. External Access Home Page Expenditure Estimate Listing
3. Search Contract Expenditure Estimate Screen
4. Search Results
5. Maintain Contract Expenditure Estimate Screen
6. Create New Contract Expenditure Estimate
7. Edit and Submit Contract Expenditure Estimate
8. Returned Expenditure Estimates

Contract Expenditure Estimates Background

Consulting Engineers supervise construction activity (contracts) and report on progress. The consulting engineer prepares an invoice at the end of the month based on the construction work and supervision completed and submits the Progress Estimate as well as an Expenditure Estimate Report. During this activity, the consulting engineers also create and submit a new expenditure estimate in PMA Delivery. The submission goes to the Alberta Transportation Project Administrator for review. The on-line Expenditure Estimate is where the forecasts for engineering and construction contracts are entered. On or before the fifth working day of the following month, the Project/ Contract Sponsor in each Region is responsible for reviewing the submitted expenditure estimate and forecasts provided by the consultants.

Expenditures are essentially records of money spent on work activities, capital or expenses. An “Expenditure Estimate” in the context of PMA-Delivery is a record created at a point in time describing what is forecast to be spent to date in the current fiscal year and what is forecast to be spent at the end of the fiscal year and beyond. Consulting engineers are responsible for creating a monthly expenditure estimate and submitting it to the Alberta Transportation Project Sponsor for review. The expenditure estimate is to be submitted by the last working day of the month.

Both the External Access Home Page and the Search Contract Expenditure Estimates screen allow:

- Searching of Contracts
- Viewing of Contract Expenditures and Forecasts
- Maintenance of Contract Expenditure Estimates

Figure 3.1 External Access Home Page screen with Expenditure Estimates

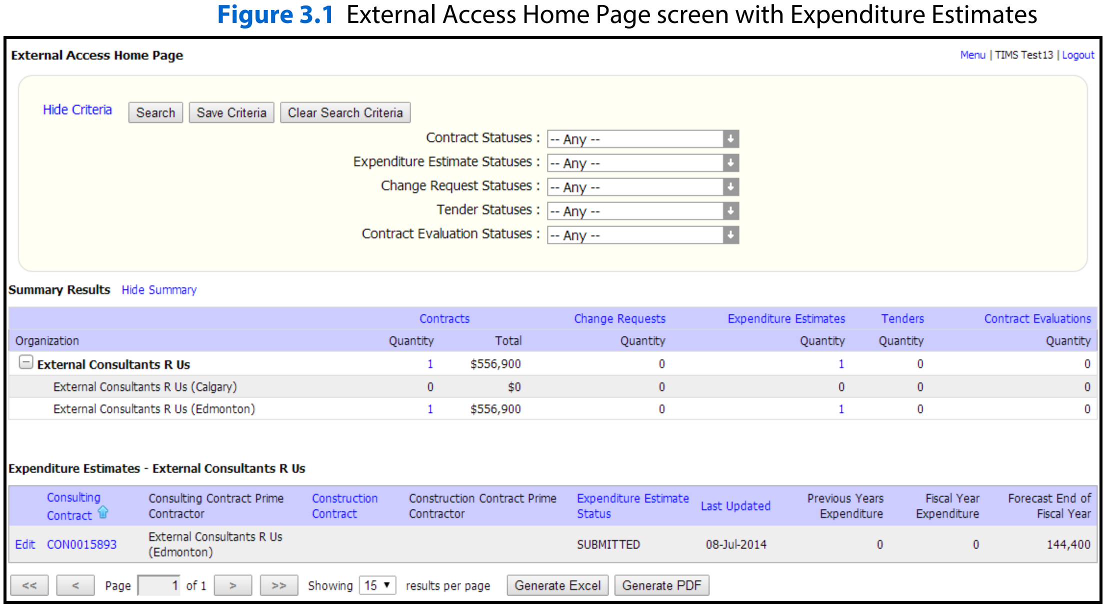
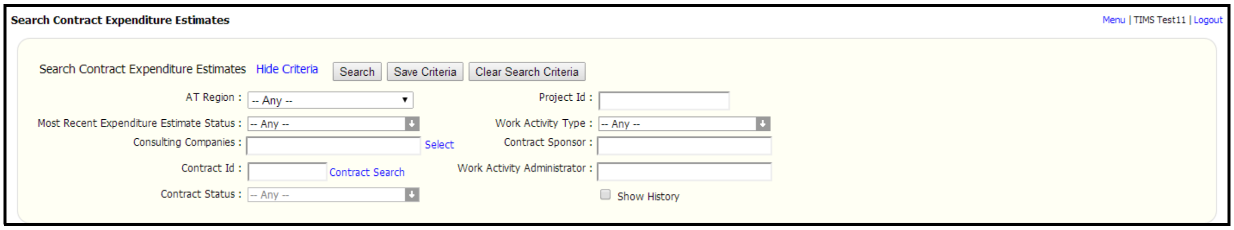


Figure 3.2 Search Contract Expenditure Estimates screen



Alert! Submit the monthly Expenditure Estimate on or before the last working day of the month.

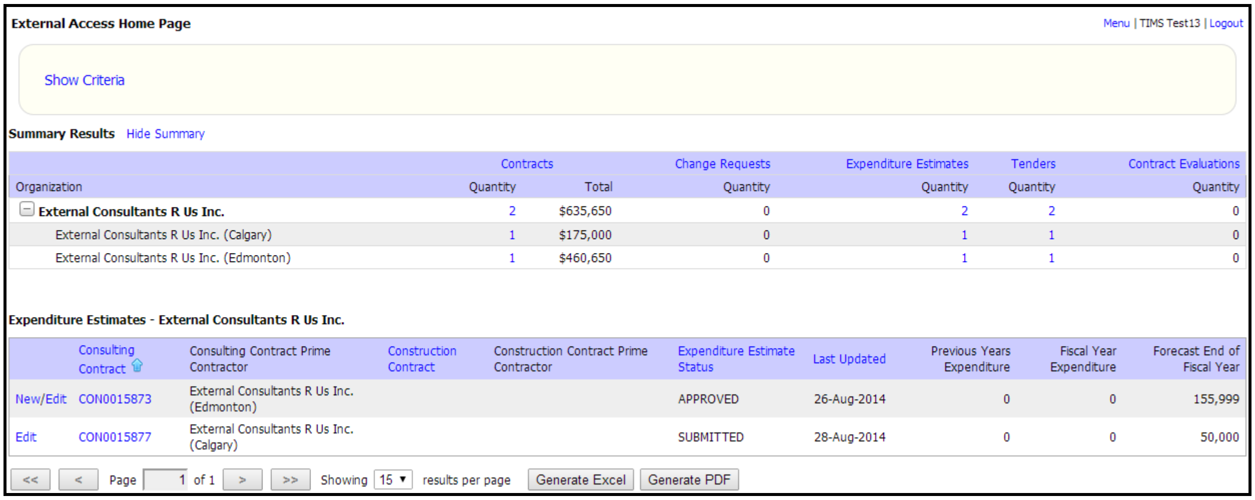
Contract Combinations

Expenditure estimates are forecasts of contract spending and therefore related to contracts and combinations of contracts. Initially a consulting contract exists whereby the consultant may be responsible for creating the tender package. Invoices for time reported against that consulting contract are received and recorded. Forecasts for the consulting contract will also be received. Later, a construction contract is awarded, and if the consultant is further contracted to perform the construction supervision, a combination of the two contracts is established. In some situations there may be two or more construction contracts as a result of the tender(s) created by the consultant. Each distinct consulting/construction contract combination is listed in the Expenditure Estimates area of the Home Page. This is because each combination has different funding and will also have different forecasts.

External Access Home Page Expenditure Estimate Listing

The External Access Home Page provides access to Expenditure Estimates. Selecting a numeric value in the Expenditure Estimate column will display the list of contract combinations.

Figure 3.3 External Access Home Page with Expenditure Estimates



The **New** link by itself indicates that no previous expenditure estimates were created for the contract(s).

The **New** and **Edit** links together offer the choice of; creating a New expenditure estimate or Viewing the last expenditure estimate. Clicking the Edit link allows viewing.

The **Edit** link by itself allows the user to edit the current expenditure estimate.

Hint: An Expenditure Estimate can be edited from the moment it is created, up until it receives approval.

Table 3.1 Search Contract Expenditure Estimate - Column Definitions

Column	Description
New, Edit New/Edit	Enter a New Expenditure Estimate Edit an existing Expenditure Estimate (In Progress, Submitted) The Edit button on the New/Edit combination allows you to view the last approved expenditure estimate.
Consulting Contract	Displays the Contract Number (CON000999) of the consulting contract and link to display the Maintain Contracts screen for more details.
Consulting Contract Prime Contractor	This will display your company and specifically the office (organization Unit) responsible for the consulting contract.

Table 3.1 Search Contract Expenditure Estimate - Column Definitions

Column	Description
Construction Contract Prime Contractor	This will display the name of the construction company awarded the construction contract.
Expenditure Estimate Status	Displays the latest Expenditure Estimate Status of the expenditure estimate. (see table below for descriptions)
Last Updated	Displays the date when the status of the expenditure estimate was last updated.
Previous Years Expenditure	Sums the Work Activity Expenditure Estimate Detail Amounts of previous year's expenditures for the selected expenditure estimate.
Fiscal Year Expenditure	Sums the Work Activity Expenditure Estimate Detail Amounts for the current fiscal year's expenditures, for the selected expenditure estimate.
Forecast End of Fiscal Year	Sums the Work Activity Expenditure Estimate Detail Amounts for the forecast fiscal year end expenditures, for the selected expenditure estimate, for the current fiscal year.

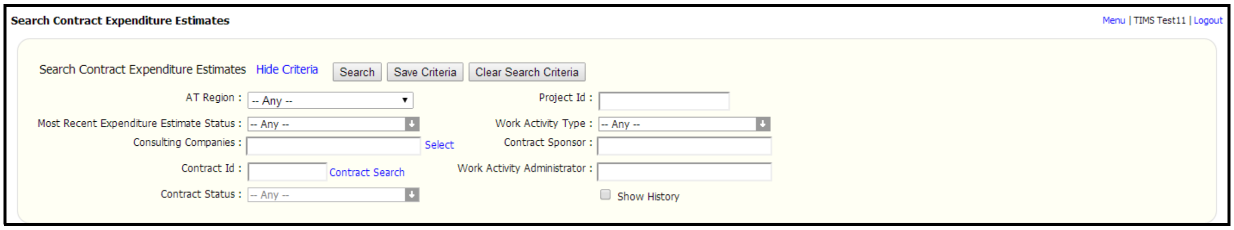
Table 3.2 Contract Expenditure Estimate - Status Definitions

Status	Description
In Progress (Data Entry)	A new Expenditure Estimate that has not been submitted.
Submitted (Submit)	An Expenditure Estimate that has been submitted by the Consultant to the Project Administrator for review.
Returned (Project Admin)	Upon review of the Expenditure Estimate the Project Admin returns it to the Consultant for correction.
Approved (Contract Sponsor)	Upon review of the Expenditure Estimate the Manager has approved it.

Search Contract Expenditure Estimate Screen

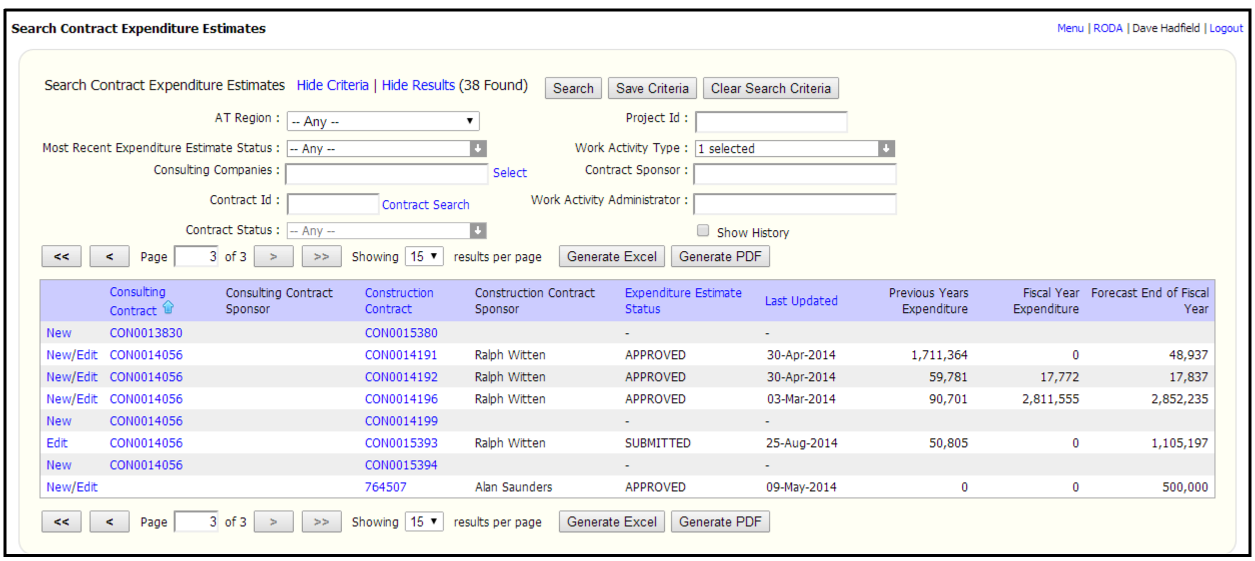
The Search Contract Expenditure Estimate screen allows you to search for any contract expenditure estimates that you have security access to. The most current expenditure estimates are listed in the results.

Figure 3.4 Search Contract Expenditure Estimates – Show History link



Hint: The Show History check box will retrieve all past expenditure estimates for the contracts matching the criteria.

Figure 3.5 Search Contract Expenditure Estimates – results



	Consulting Contract	Consulting Contract Sponsor	Construction Contract	Construction Contract Sponsor	Expenditure Estimate Status	Last Updated	Previous Years Expenditure	Fiscal Year Expenditure	Forecast End of Fiscal Year
New	CON0013830		CON0015380		-	-			
New/Edit	CON0014056		CON0014191	Ralph Witten	APPROVED	30-Apr-2014	1,711,364	0	48,937
New/Edit	CON0014056		CON0014192	Ralph Witten	APPROVED	30-Apr-2014	59,781	17,772	17,837
New/Edit	CON0014056		CON0014196	Ralph Witten	APPROVED	03-Mar-2014	90,701	2,811,555	2,852,235
New	CON0014056		CON0014199		-	-			
Edit	CON0014056		CON0015393	Ralph Witten	SUBMITTED	25-Aug-2014	50,805	0	1,105,197
New	CON0014056		CON0015394		-	-			
New/Edit			764507	Alan Saunders	APPROVED	09-May-2014	0	0	500,000

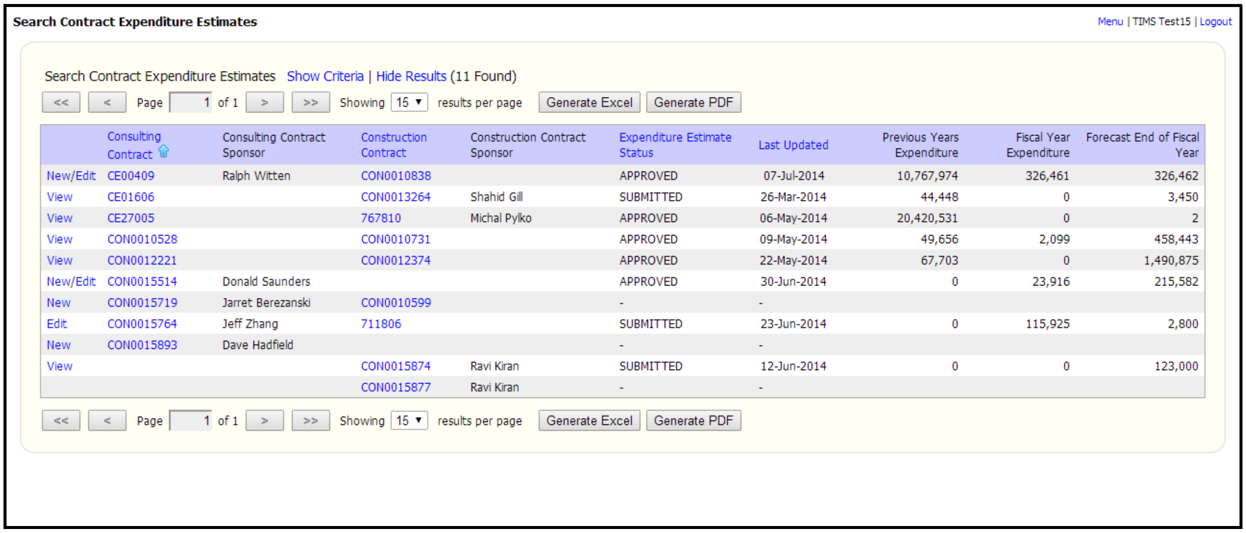
The **New** link by itself indicates that no previous expenditure estimates were created for the contract(s).

The **New** and **Edit** links together offer the choice of; creating a New expenditure estimate or Viewing the last expenditure estimate. Clicking the Edit link allows viewing.

The **Edit** link by itself allows the user to edit the current expenditure estimate.

Hint: An Expenditure Estimate can be edited from the moment it is created, up until it receives approval.

Figure 3.6 Search Contract Expenditure Estimates listing



Search Contract Expenditure Estimates

Menu | TIMS Test15 | Logout

Search Contract Expenditure Estimates Show Criteria | Hide Results (11 Found)

<< < Page 1 of 1 > >> Showing 15 results per page Generate Excel Generate PDF

	Consulting Contract	Consulting Contract Sponsor	Construction Contract	Construction Contract Sponsor	Expenditure Estimate Status	Last Updated	Previous Years Expenditure	Fiscal Year Expenditure	Forecast End of Fiscal Year
New/Edit	CE00409	Ralph Witten	CON0010838		APPROVED	07-Jul-2014	10,767,974	326,461	326,462
View	CE01606		CON0013264	Shahid Gill	SUBMITTED	26-Mar-2014	44,448	0	3,450
View	CE27005		767810	Michal Pylko	APPROVED	06-May-2014	20,420,531	0	2
View	CON0010528		CON0010731		APPROVED	09-May-2014	49,656	2,099	458,443
View	CON0012221		CON0012374		APPROVED	22-May-2014	67,703	0	1,490,875
New/Edit	CON0015514	Donald Saunders			APPROVED	30-Jun-2014	0	23,916	215,582
New	CON0015719	Jarret Berezanski	CON0010599		-	-			
Edit	CON0015764	Jeff Zhang	711806		SUBMITTED	23-Jun-2014	0	115,925	2,800
New	CON0015893	Dave Hadfield			-	-			
View			CON0015874	Ravi Kiran	SUBMITTED	12-Jun-2014	0	0	123,000
			CON0015877	Ravi Kiran	-	-			

<< < Page 1 of 1 > >> Showing 15 results per page Generate Excel Generate PDF

Table 3.3 Search Contract Expenditure Estimate - Column Definitions

Column	Description
New, Edit New/Edit	Enter a New Expenditure Estimate Edit an existing Expenditure Estimate (In Progress, Submitted) The Edit button on the New/Edit combination allows you to view the last approved expenditure estimate.
Consulting Contract	Displays the Contract Number (CON000999) of the consulting contract and link to display the Maintain Contracts screen for more details.
Consulting Contract Sponsor	The Manager entered as the Contract Sponsor on the Consulting Contract.
Construction Contract	Displays the Contract Number (CON009999) of the construction contract and link to display the Maintain Contracts screen for more details.
Construction Contract Sponsor	The Manager entered as the Contract Sponsor on the Construction Contract.
Expenditure Estimate Status	Displays the latest Expenditure Estimate Status of the expenditure estimate. (see table below for descriptions)
Last Updated	Displays the date when the status of the expenditure estimate was last updated.

Table 3.3 Search Contract Expenditure Estimate - Column Definitions

Column	Description
Previous Years Expenditure	Sums the Work Activity Expenditure Estimate Detail Amounts of previous year's expenditures for the selected expenditure estimate.
Fiscal Year Expenditure	Sums the Work Activity Expenditure Estimate Detail Amounts for the current fiscal year's expenditures, for the selected expenditure estimate.
Forecast End of Fiscal Year	Sums the Work Activity Expenditure Estimate Detail Amounts for the forecast fiscal year end expenditures, for the selected expenditure estimate.

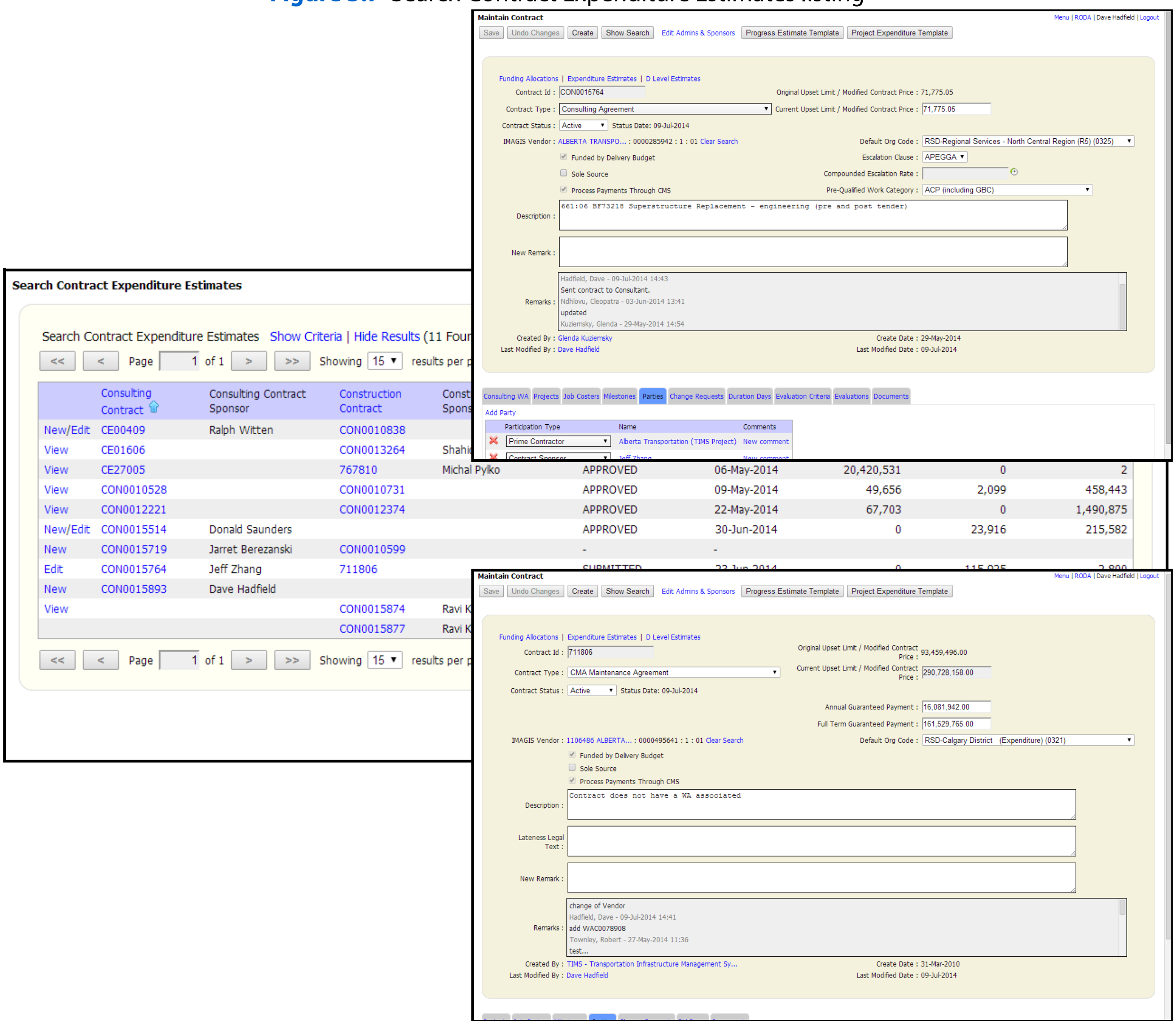
Table 3.4 Contract Expenditure Estimate - Status Definitions

Status	Description
In Progress (Data Entry)	A new Expenditure Estimate that has not been submitted.
Submitted (Submit)	An Expenditure Estimate that has been submitted by the Consultant to the Project Administrator for review.
Returned (Project Admin)	Upon review of the Expenditure Estimate the Project Admin returns it to the Consultant for correction.
Approved (Contract Sponsor)	Upon review of the Expenditure Estimate the Manager has approved it.

Search Results

Expenditure Estimate search results provide links to Consulting and Construction Contracts as well as Expenditure Estimates. Clicking the Contract ID (i.e. CON0012221) will open the Maintain Contract screen with the contract loaded. Search results will list each distinct combination of consulting and construction contracts for the external users level of security. This means only the combinations that involve consulting contracts for the organization that the external user is employed by.

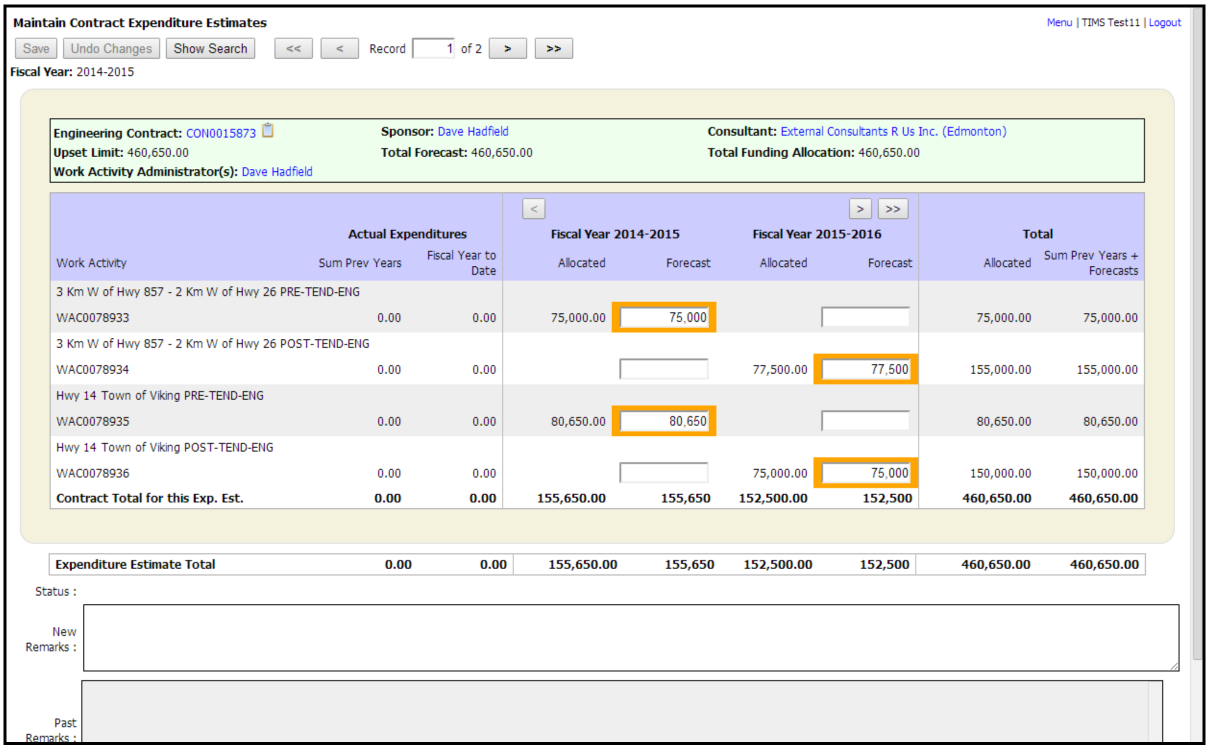
Figure 3.7 Search Contract Expenditure Estimates listing



Maintain Contract Expenditure Estimates Screen

The Maintain Contract Expenditure Estimates screen displays all of the forecast information about associated contracts. For example when the consulting agreement exists, the maintain contract expenditure estimate screen will allow users (with proper authority) to enter updated forecast information. Once a construction contract that is related to the consulting agreement becomes active, it too is displayed on the Maintain Construction Expenditure Estimates screen above the consulting agreement.

Figure 3.8 Maintain Contract Expenditure Estimates – new contract



When the first expenditure estimate for a new contract is created some of the fields are highlighted with an orange border. These fields have been automatically updated with the amounts forecast in the original contract upset limit. These fields can be updated and once they are, the orange border is removed by PMA Delivery.

Hint: When both the consulting and construction contracts are active the construction contract is displayed first with the consulting contract below.

Table 3.5 Contract Expenditure Estimate - Column Definitions

Column	Description
Show Search (button)	Returns the user to the search results list.
Fiscal Year	Displays the current fiscal year.
Contract	Displays the Contract Number (CON009999) of the consulting/ construction contract and link to display the Maintain Contracts screen for more details.
 (button)	Used to view the Work Activities associated with the contract.
Upset Limit	Displays the current upset limit of the contract.
Work Activity Administrator	Displays the name of the regional project administrator for the work activities of the contract.
Contract Sponsor	Displays the Manager entered as the Contract Sponsor on the Consulting/Construction Contract.
Total Forecast	Displays the total amount forecast for the contract.
Contractor/ Consultant	The name of the organization awarded the contract. Contractor for the construction contract and consultant for the consulting contract.
Total Funding Allocation	The total amount of funding currently allocated to the contract.
Work Activity	Displays the Work Activity Description and ID.
Actual Sum Prev Years	Displays the total amount that has been processed for payment in all of the preceding years for the contract.
Actual Fiscal Year to Date	Displays the total amount that has been processed for payment during the current fiscal year.
Fiscal Year 1 Allocated	Displays the total amount of funding available for the Fiscal Year 1.
Fiscal Year 1 Forecast	Displays the total amount of funding forecast for the Fiscal Year 1. This field is editable and used to update the forecast.
Fiscal Year 2 Allocated	Displays the total amount of funding available for the Fiscal Year 2.
Fiscal Year 2 Forecast	Displays the total amount of funding forecast for the Fiscal Year 2. This field is editable and used to update the forecast.
Total Allocated	Sums all allocated amounts for the work activity.
Total Sum Prev Years + Forecasts	Sums all Previous Year Actuals with all Forecast amounts.
Expenditure Estimate Status	Displays the latest Expenditure Estimate Status of the expenditure estimate. (see table below for descriptions)
New Remarks	Allows the user updating the expenditure estimate to enter a remark about the values entered in the forecast fields.
Past Remarks	Displays all remarks made on previous expenditure estimates.

Table 3.6 Contract Expenditure Estimate - Status Definitions

Status	Description
In Progress (Data Entry)	A new Expenditure Estimate that has not been submitted.
Submitted (Submit)	An Expenditure Estimate that has been submitted by the Consultant to the Project Administrator for review.
Returned (Project Admin)	Upon review of the Expenditure Estimate the Project Admin returns it to the Consultant for correction.
Approved (Contract Sponsor)	Upon review of the Expenditure Estimate the Manager has approved it.

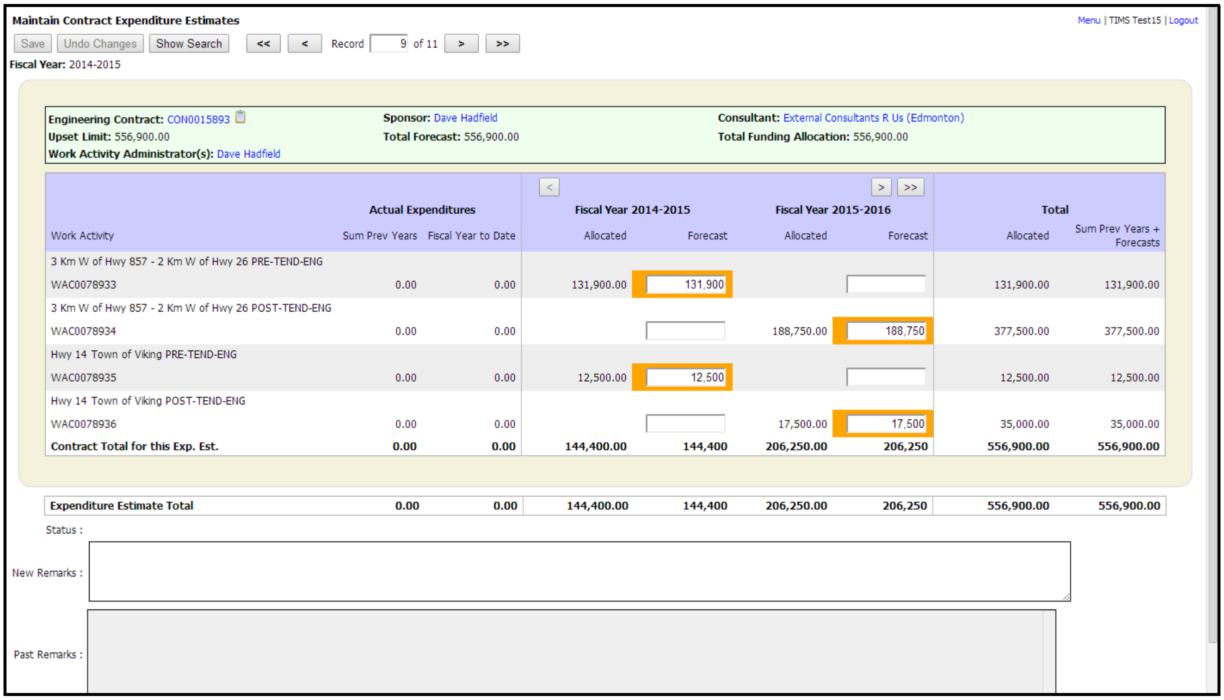
Hint: There can be as many Fiscal Years forecasts as necessary for the contract. Navigation buttons in the Fiscal Year area allow the user to go to the next year, and the next.

Create New Contract Expenditure Estimate

The New link opens the Maintain Contract Expenditure Estimates screen. On a monthly basis the External Consultant selects the New link for each contract combination and if necessary, updates forecast amounts. Where applicable, the consulting engineer edits the Forecast amount to reflect what is considered to be the correct forecast amount (at the time the expenditure estimate was created). Once completed, the consultant with External Submit security ‘Submits’ the Expenditure Estimate. The Expenditure Estimate will then be reviewed by the Alberta Transportation Project/Contract Sponsor.

Hint: Do not enter dollar signs ($) or commas (,) when entering values. PMA Delivery will take care of the formating.

Figure 3.9 Maintain Contract Expenditure Estimates screen - first Expenditure Estimate



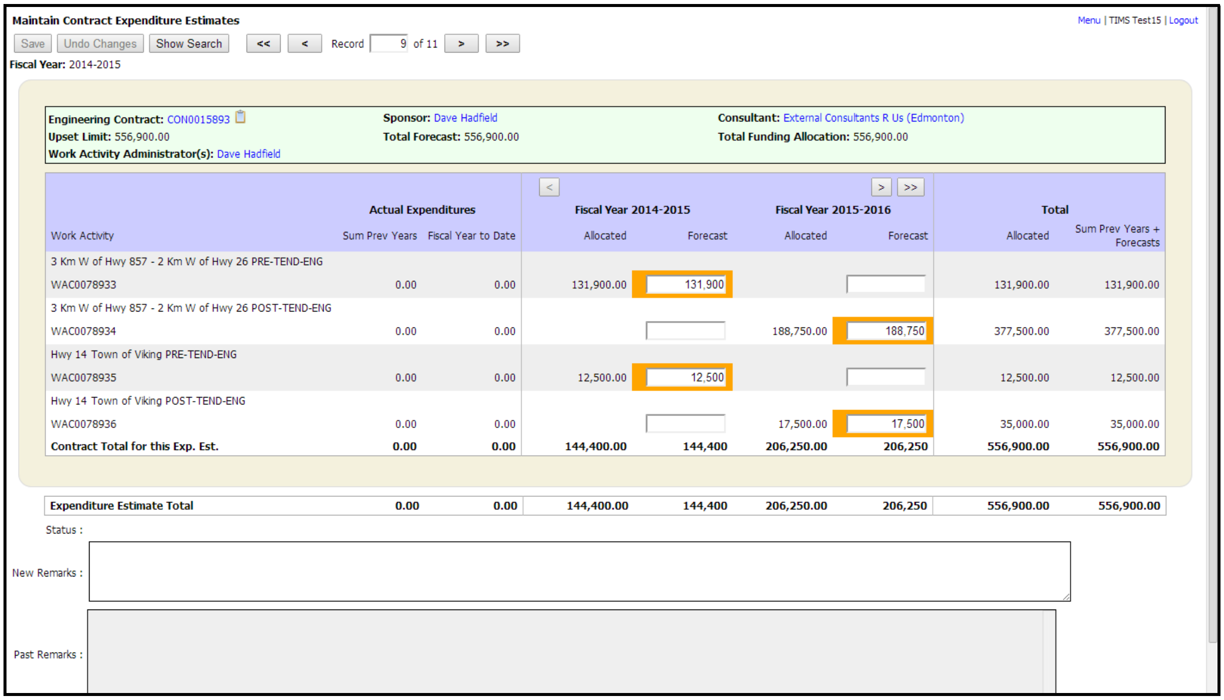
Hint:	The Fiscal Year Forecast amounts (whole $) are the dollars estimated to be spent during the fiscal year (this is not the amount remaining).

The new link takes a snapshot of the database at that moment in time. Any transactions that take place after the new expenditure has been created, will not be displayed on the Maintain Contract Expenditure Estimates screen. For example, if a new expenditure estimate is created, it will show the total amount of all invoices processed (Actual Expenditures - Fiscal Year to Date column) as of that day. If an invoice is processed the next day: the amount will not be reflected in the expenditure estimate. It is for this reason that the forecast amount should be based on what the consulting engineer knows to be true and not on what the screen displays.

Auto-entry of Forecast

When a New Expenditure Estimate is created, if no Forecast amount was previously entered into a Forecast field, the amount of the Allocation is applied and the Forecast field is highlighted to indicate the auto-entry. Once the Expenditure Estimate is Saved or Submitted the highlighting is removed. The user can also overwrite the auto-entry for a more correct amount. Again the highlighting will go away once the Expenditure Estimate is saved or submitted.

Figure 3.10 Maintain Contract Expenditure Estimates screen - No Previously Approved Expenditure Estimate



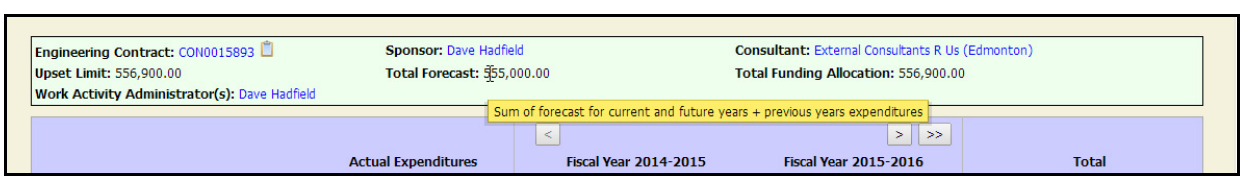
Maintain Contract Expenditure Estimate Screen - Tips

The Maintain Contract Expenditure Estimates screen contains calculated values that are available by mousing over areas of the screen. Buttons are available that will display more information if required by the user.

Alert!	The ‘mouse over’ information is only available when working with the most current Expenditure Estimate.

Mousing over the Total Forecast value displays the formula used to calculate the Total Forecast.

Figure 3.11 Maintain Contract Expenditure Estimates screen – Total Forecast tooltip



Mousing over the clipboard icon, beside the Contract Number, will display a tooltip of what the clipboard will display when clicked.

Figure 3.12 Maintain Contract Expenditure Estimates screen – Contract ID Clipboard button

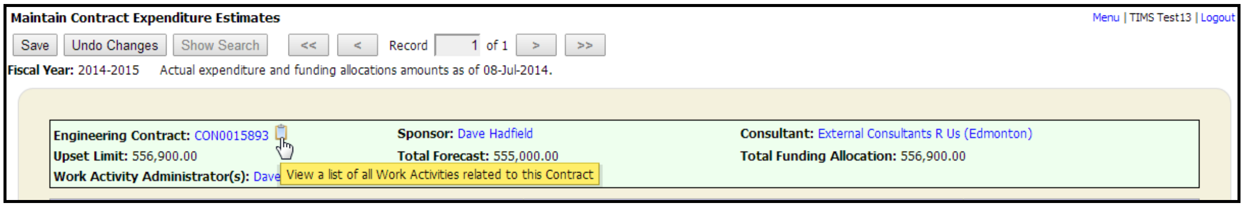


Figure 3.13 Maintain Contract Expenditure Estimates screen – WAC Description

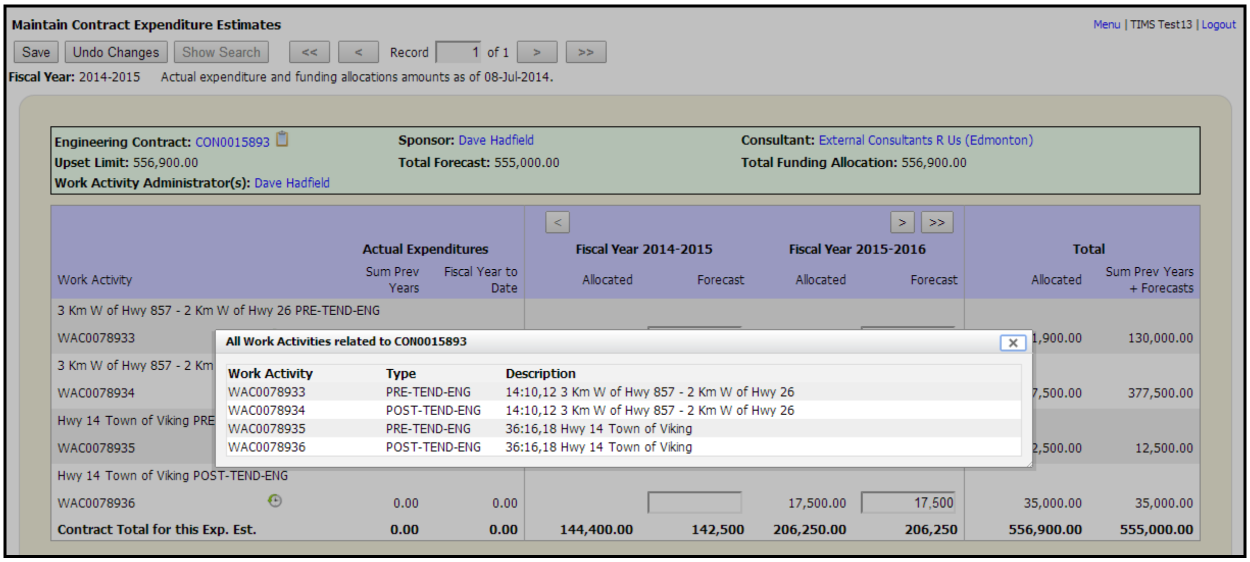
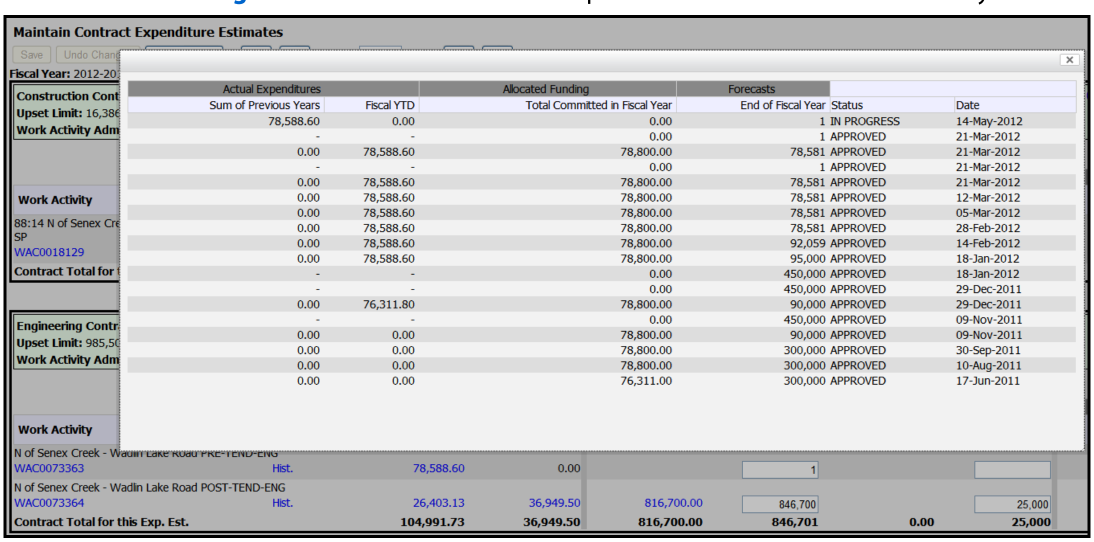
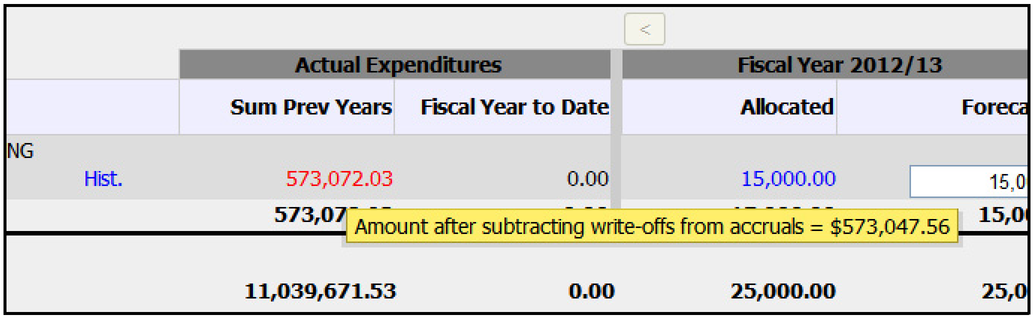


Figure 3.14 Maintain Contract Expenditure Estimates screen – History link



Actual Expenditures display the amounts that have been paid via IMAGIS. Mousing over an Actual amount will display a tooltip containing the Actual less any amount written off. This amount also displays any amounts coded to the WAC or Job Coster even if there are outstanding errors on the entry.

Figure 3.15 Maintain Contract Expenditure Estimates screen - Actual Expenditure tooltip

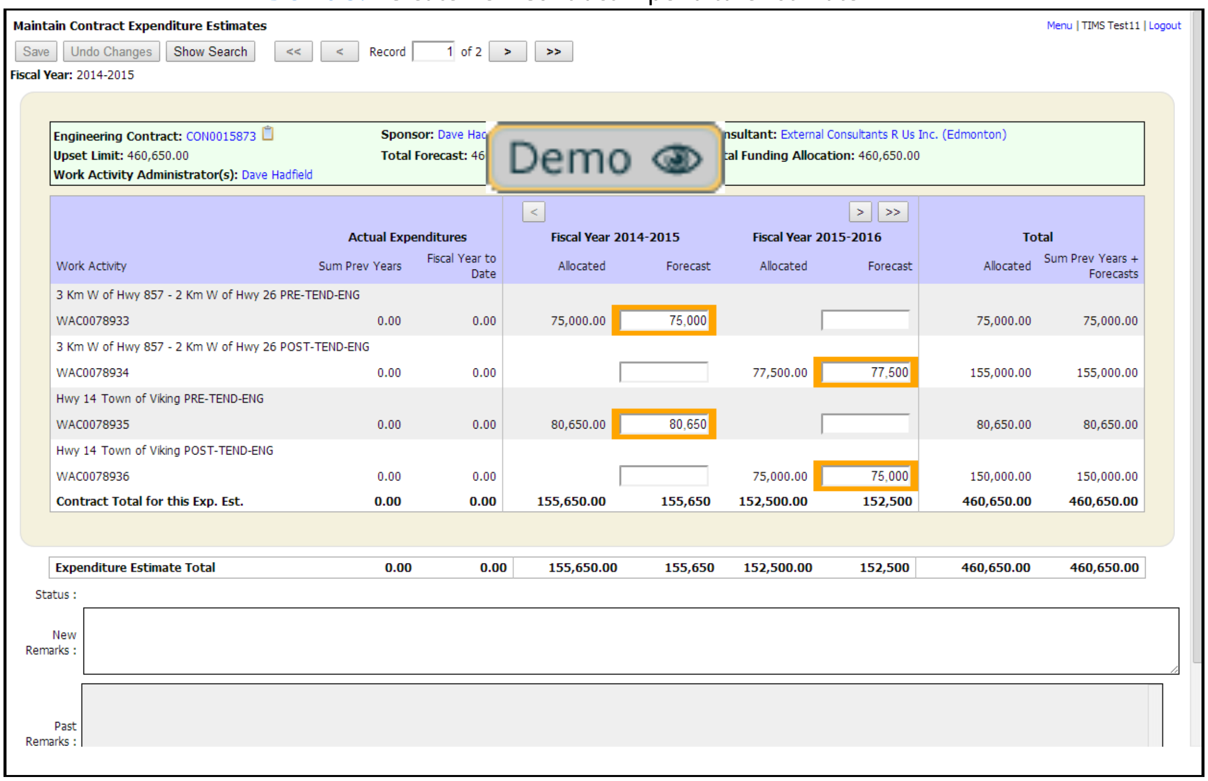


Alert! The Write-Offs tooltip will only appear for Expenditure Estimates that are In Progress or Submitted.

Create New Contract Expenditure Estimate

External Consultants with the External Data Entry security tole can create new expenditure estimates and edit forecast amounts.

Demo 3.1 Create New Contract Expenditure Estimate



How To

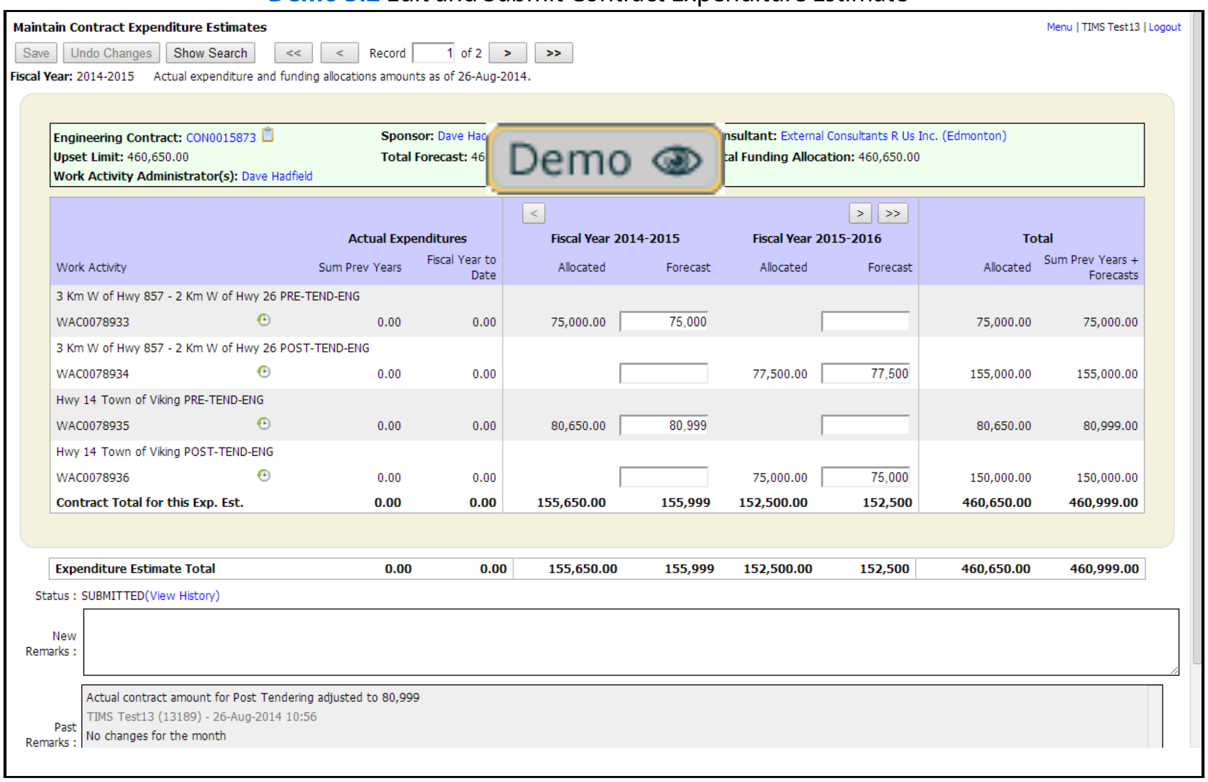
1. From the *External Access Home Page* screen select an **Expenditure Estimate** value.
2. Select the **New** link of the appropriate contract.
3. From the *Maintain Contract Expenditure Estimates* screen edit any **Forecast Amounts** as required.
4. In the **New Remarks** field type any supporting comments.
5. Select the **Save** button.

Edit and Submit Contract Expenditure Estimate

Expenditure Estimate search results provide links to Consulting and Construction Contracts as well as Expenditure Estimates.

Alert! Only an External user with the External Submit security role can 'Submit' an Expenditure Estimate.

Demo 3.2 Edit and Submit Contract Expenditure Estimate



How To

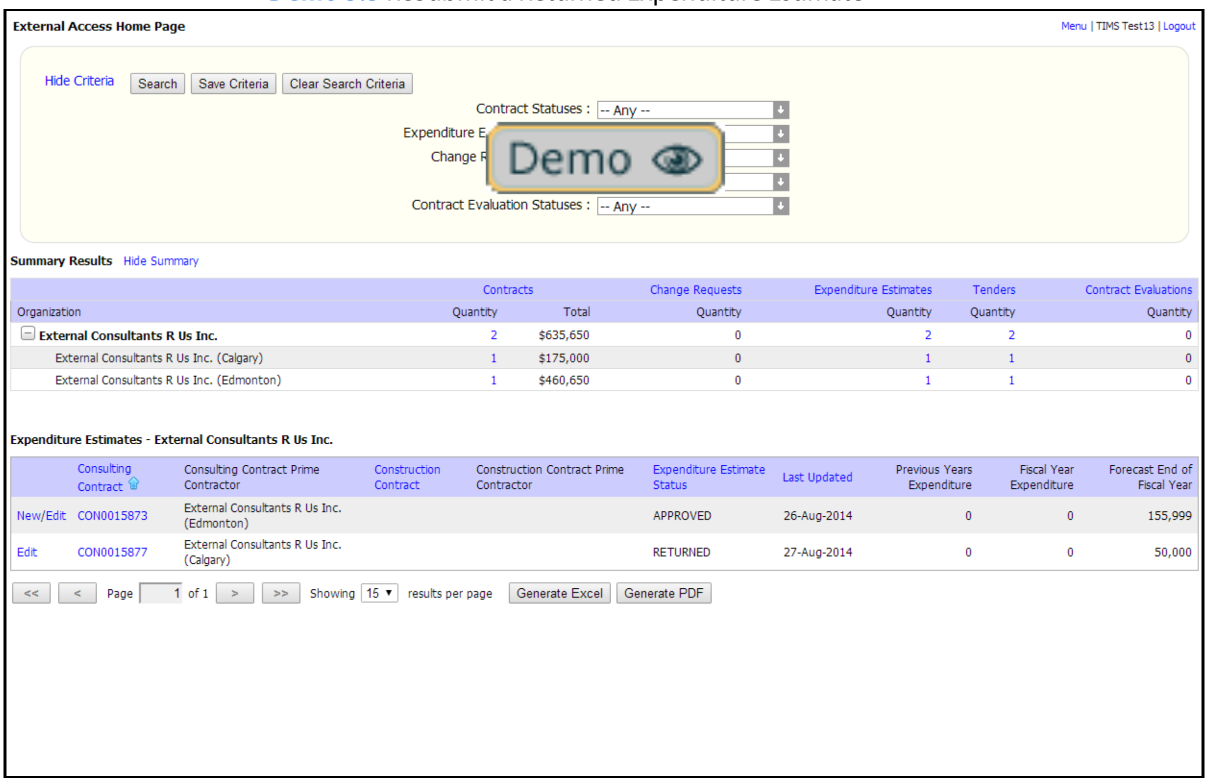
1. From the *External Access Home Page* screen select an **Expenditure Estimate** value.
2. Select the **Edit** link of the appropriate contract.
3. From the *Maintain Contract Expenditure Estimates* screen edit any **Forecast Amounts** as required.
4. In the **New Remarks** field type any supporting comments.
5. Select the **Submit** link.

Returned Expenditure Estimates

On occasion the Transportation Contract Sponsor may Return an expenditure Estimate for correction.

Alert!	An Expenditure Estimate with a status of Returned must have a remark from the Transportation Contract Sponsor.

Demo 3.3 ReSubmit a Returned Expenditure Estimate



How To

1. From the *External Access Home Page* screen select an **Expenditure Estimate** value.
2. Select the **Edit** link of the Returned expenditure estimate.
3. From the *Maintain Contract Expenditure Estimates* screen view any **Past Remarks** as required.
4. Edit any **Forecast Amounts** as required.
5. In the **New Remarks** field type any supporting comments.
6. Select the **Submit** link.

Chapter 4: View Vendor Qualifications

Alberta Transportation (AT) maintains a process allowing consultants to be pre-qualified in certain categories of work for AT. When a consultant has been pre-qualified, they will be invited to respond to Requests for Expression of Interest that are periodically put out by AT. The Search Vendor Qualifications screen provides a means for External Users to view the work categories that consultants are pre-qualified in.

Topics in Chapter:

1. Vendor Qualifications
2. Search for Vendor Qualifications
3. Search Vendor Qualifications Screen

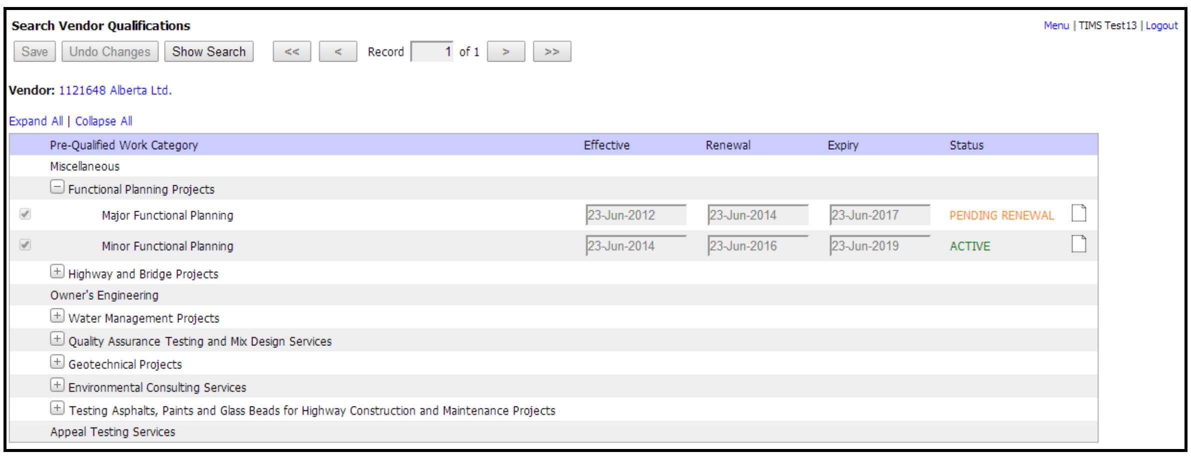
Vendor Qualifications

Typically the Request for Expression of Interest (RFEI) is distributed to pre-qualified consultants (although there are exceptions to this). The Search Vendor Qualifications screen is used to view the qualifications of vendors/consultants.

Establishing the Qualifications of vendors, facilitates the selection of 'Recipients' on Requests for Expression of Interest (RFEIs). Vendors with qualifications matching the Pre-Qualification Work Categories of the RFEI are automatically listed for selection.

Each vendor can also be qualified in one or more work categories. Each work category qualification is tracked separately as they may or may not have become effective at the same time and may or may not expire at the same time. Each pre-qualified work category selected for a vendor will have a Qualification Status (Future Active, Active, Pending Renewal, Expired).

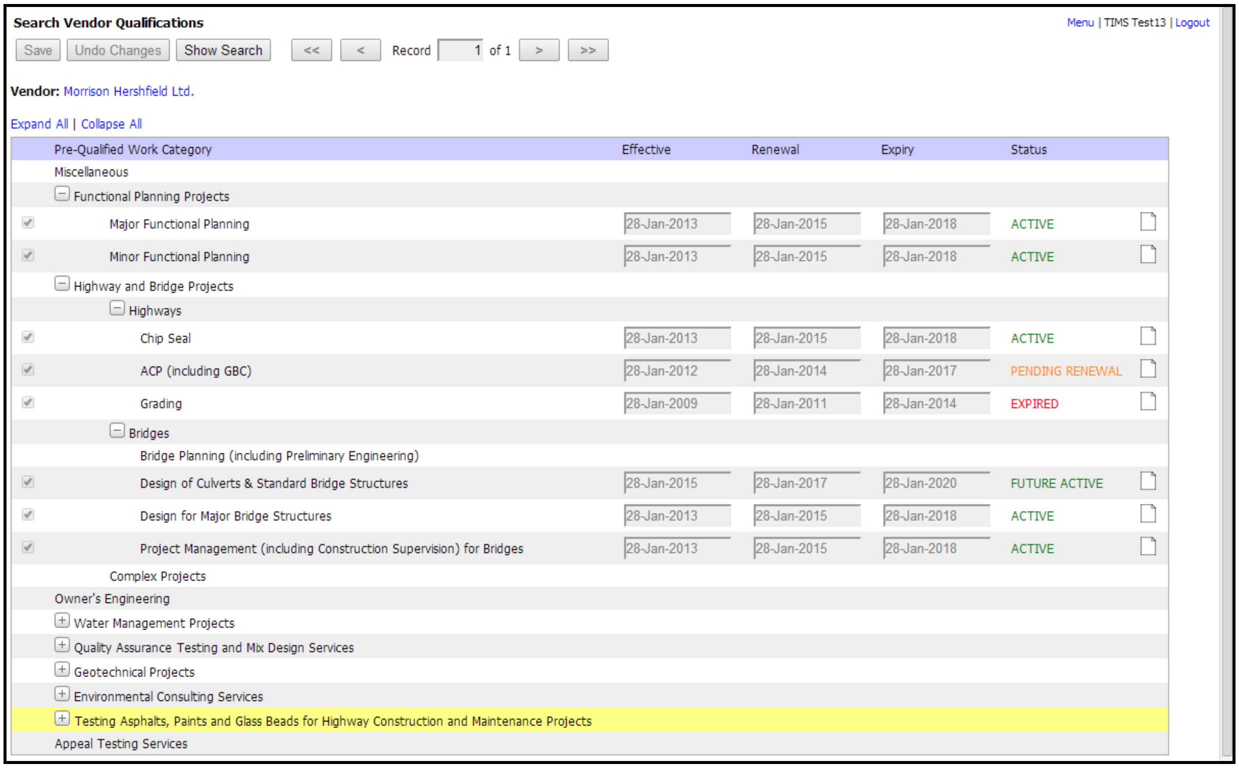
Figure 4.1 Search Vendor Qualifications screen



Effective/Renewal/Expiry/Status

Each vendor listed in the Search Vendor Qualifications screen can actually have zero, one or more Pre-Qualified Work Categories that they are qualified in. Each work category will have a date when the qualification became effective, a date when a work category renewal is required, and a date when the work category qualification will expire. Figure 4.2 below taken on August 8 2014, displays examples of the various status'.

Figure 4.2 Search Vendor Qualifications screen - Status Example



Effective Date The Effective Date displays the date for the vendor’s qualification(s). The Effective Date defaults to the date when the Work Category was selected.

Renewal Date The Renewal Date displays the date when the vendor’s renewal comes due. When a new qualification is set up, the default renewal date is automatically set to the Effective Date plus 2 years. If the Effective Date is adjusted, the Renewal Date is also automatically adjusted accordingly - maintaining the two year difference.

Expiry Date The Expiry Date displays the date on which the vendor’s qualification expires unless renewed. When a new qualification is set up, the default renewal date is automatically set to the Effective Date plus 5 years. If the Effective Date is adjusted, the Expiry Date is also automatically adjusted accordingly - maintaining the five year difference.

Search for Vendor Qualifications

The Search Vendor Qualifications screen is used to list the vendors and/or consultants that have active TIMS Party IDs. The results of the search will display the vendors and the Work Categories they have been 'pre-qualified' to perform. Adding criteria can limit the number of search results. Available criteria includes:

- party name (vendor name)
- pre-qualified work category (major functional planning, chip seal, etc.)
- qualification status (active, expired, pending renewal, etc.)
- specified time period (i.e. all vendors pending renewal between one date and another)

Search Vendor Qualifications Screen

The screen allows the user to specify criteria in order to find a vendor or vendors who have been pre-qualified in particular Work Categories.

Figure 4.3 Search Vendor Qualifications screen - blank fields

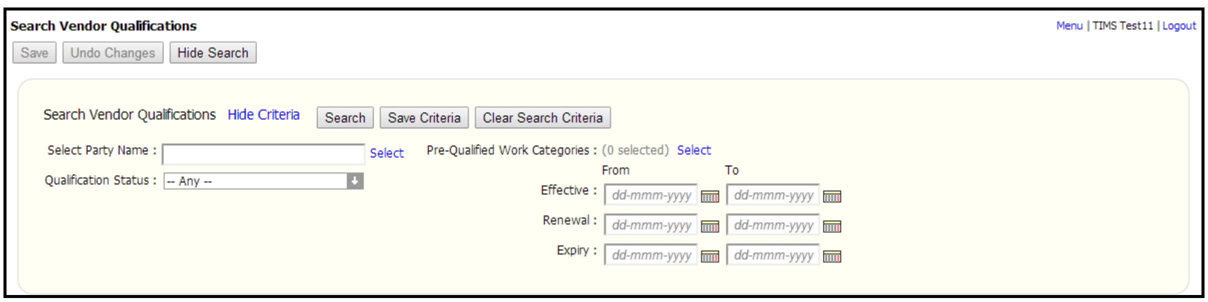
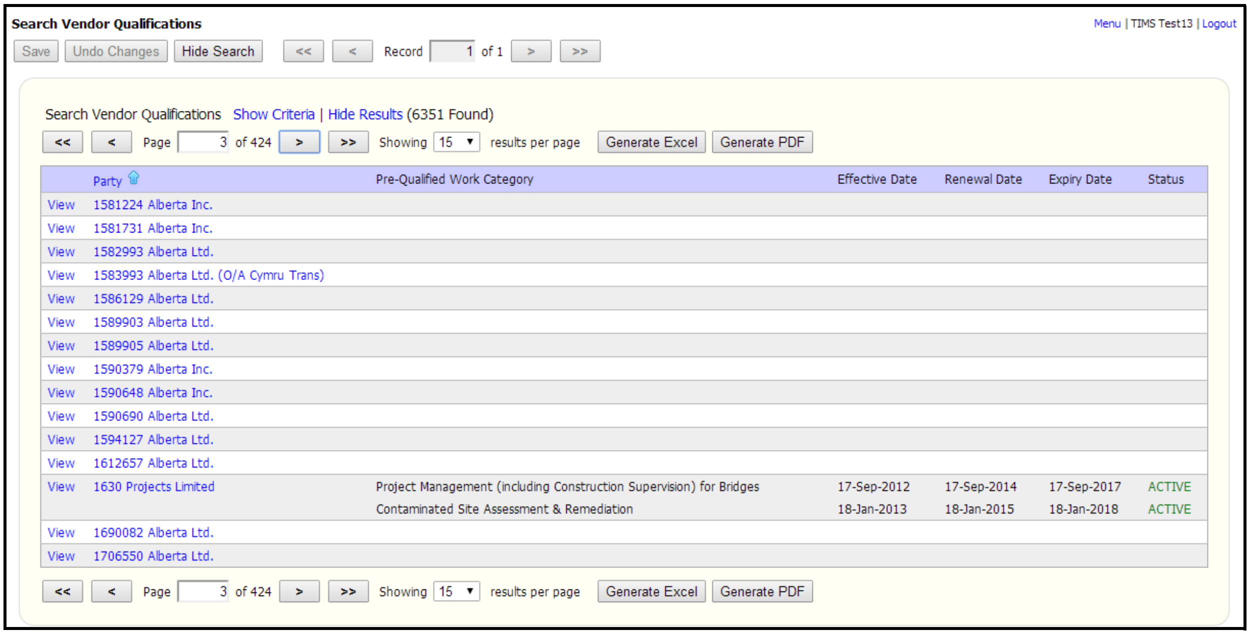


Table 4.1 Search Vendor Qualifications screen - field definitions

Field	Description
Party Name	Used to search for specific vendor or consultant.
Pre-Qualified Work Categories	Used to identify specific Work Categories.
Qualification Status	Used to limit results to those with a matching status (i.e. Active, Expired)
Effective Dates	Used to establish a period of time in which the vendor became pre-qualified.
Renewal Dates	Used to establish a period of time in which the vendor's qualification(s) need to be renewed.
Expiry Dates	Used to establish a period of time in which the vendor's qualification(s) will expire.

Figure 4.4 Search Vendor Qualifications screen - results


Search Vendor Qualifications

Menu | TIMS Test13 | Logout

Save | Undo Changes | Hide Search | << | < | Record 1 of 1 | > | >>

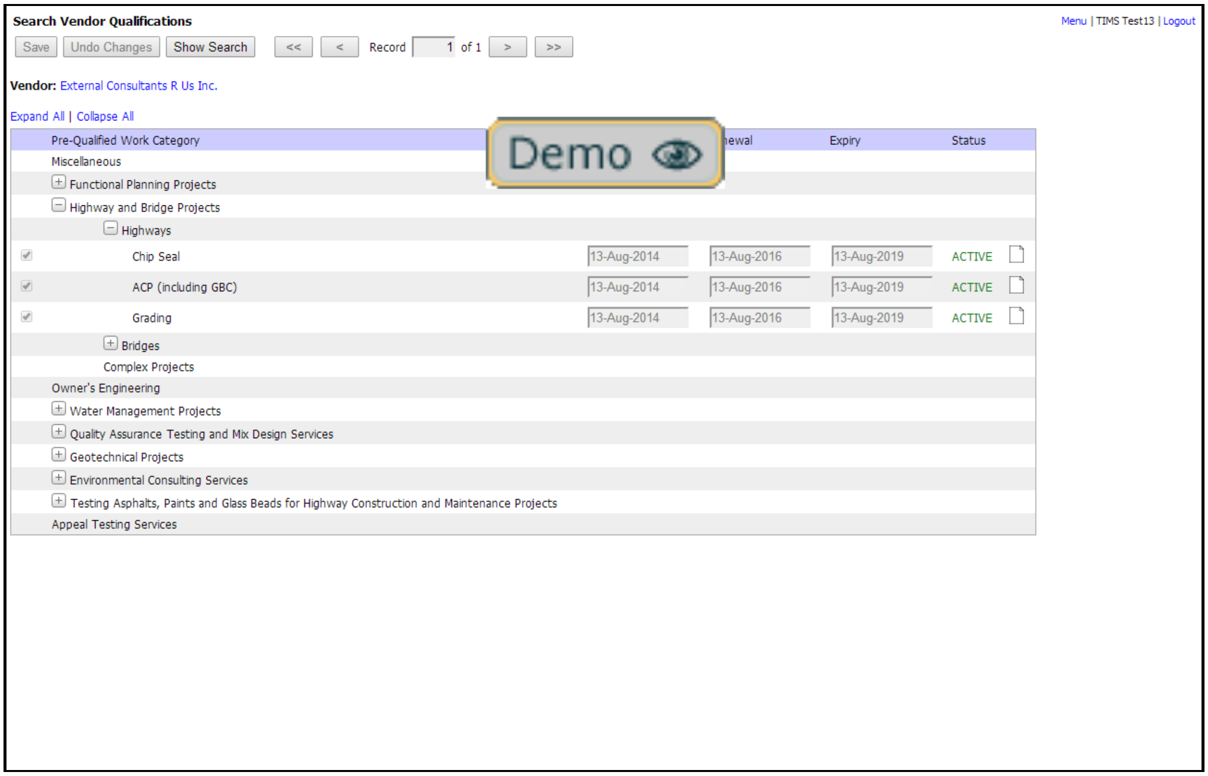
Search Vendor Qualifications Show Criteria | Hide Results (6351 Found)

<< | < | Page 3 of 424 | > | >> | Showing 15 results per page | Generate Excel | Generate PDF

	Party	Pre-Qualified Work Category	Effective Date	Renewal Date	Expiry Date	Status
View	1581224 Alberta Inc.					
View	1581731 Alberta Inc.					
View	1582993 Alberta Ltd.					
View	1583993 Alberta Ltd. (O/A Cymru Trans)					
View	1586129 Alberta Ltd.					
View	1589903 Alberta Ltd.					
View	1589905 Alberta Ltd.					
View	1590379 Alberta Inc.					
View	1590648 Alberta Inc.					
View	1590690 Alberta Ltd.					
View	1594127 Alberta Ltd.					
View	1612657 Alberta Ltd.					
View	1630 Projects Limited	Project Management (including Construction Supervision) for Bridges	17-Sep-2012	17-Sep-2014	17-Sep-2017	ACTIVE
		Contaminated Site Assessment & Remediation	18-Jan-2013	18-Jan-2015	18-Jan-2018	ACTIVE
View	1690082 Alberta Ltd.					
View	1706550 Alberta Ltd.					

<< | < | Page 3 of 424 | > | >> | Showing 15 results per page | Generate Excel | Generate PDF

Demo 4.1 Search for Vendor Qualifications



How To

1. From the *Main Menu* click on **Search Vendor Qualifications**.
2. From the *Search Vendor Qualifications* screen enter criteria to display the required vendor(s).
3. Click the **Search** button.
4. Click the View link to display the Vendor Qualifications.

Maintain Vendor Qualifications Screen

The Maintain Vendor Qualifications screen displays the current Work Categories and their structure.

Figure 4.5 Search Vendor Qualifications screen

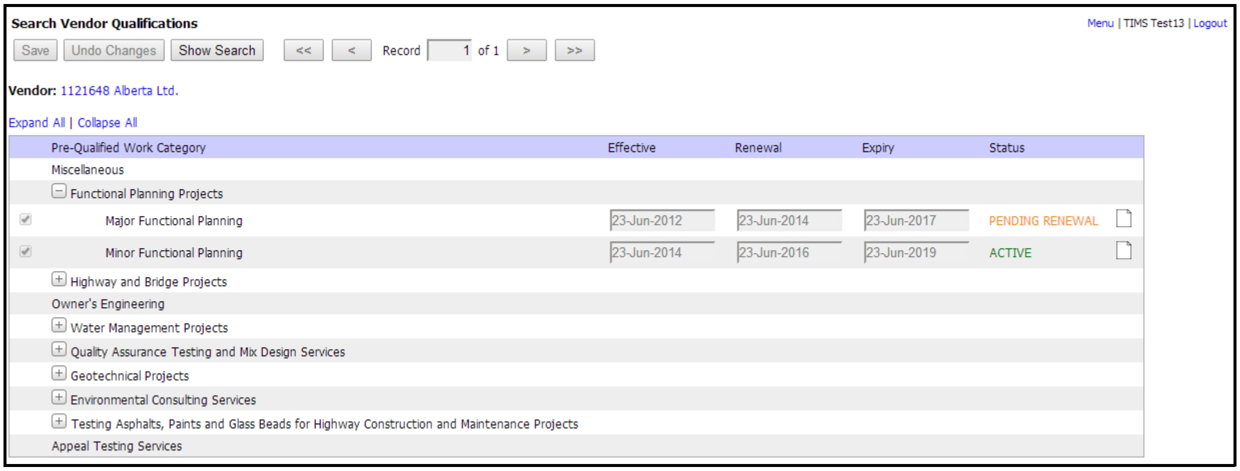


Table 4.2 Search Vendor Qualifications - field definitions

Field	Description
Expand All (button)	Opens all category levels to display the entire list of Work Categories.
Collapse All (button)	Closes all sub-category levels to display only the Work Categories at the highest level.
Expand/Collapse (buttons)	Opens or closes individual Work Category to display or hide the sub-categories of the Work Category.
Note	Opens the Comments window providing the ability to view notes specific to a work category for the vendor.

Alert! Qualifications are attached to the organization not the organizational unit.

Chapter 5: Search for Tenders

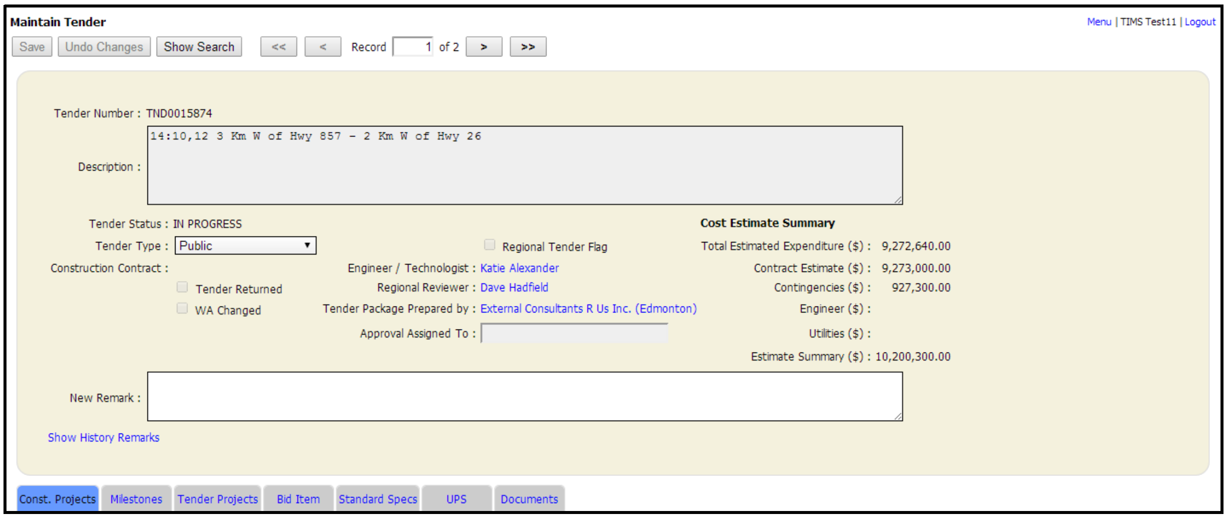
Changes and updates to Tenders occur over long periods of time. Therefore, it is important to be able to search for the required tender when the time comes. This chapter covers two methods of finding tenders.

Topics in Chapter:

External Access Home Page - Tenders

The External Access Home Page provides the user with access to existing tenders. However, only Tenders where the 'Tender Package Prepared by' matches the organization the user works for, will be listed in the results. Until the Transportation Project Administrator enters the organization as the Tender Package Prepared By, the Tender will not be listed on the organizations Home Page listing.

Figure 5.1 Maintain Tender screen - Tender Package Prepared By example



Alert! External Users can only view Tenders where their organization is the value in the 'Tender Package Prepared by' field.

Figure 5.2 External Access Home Page screen - Tender Listing

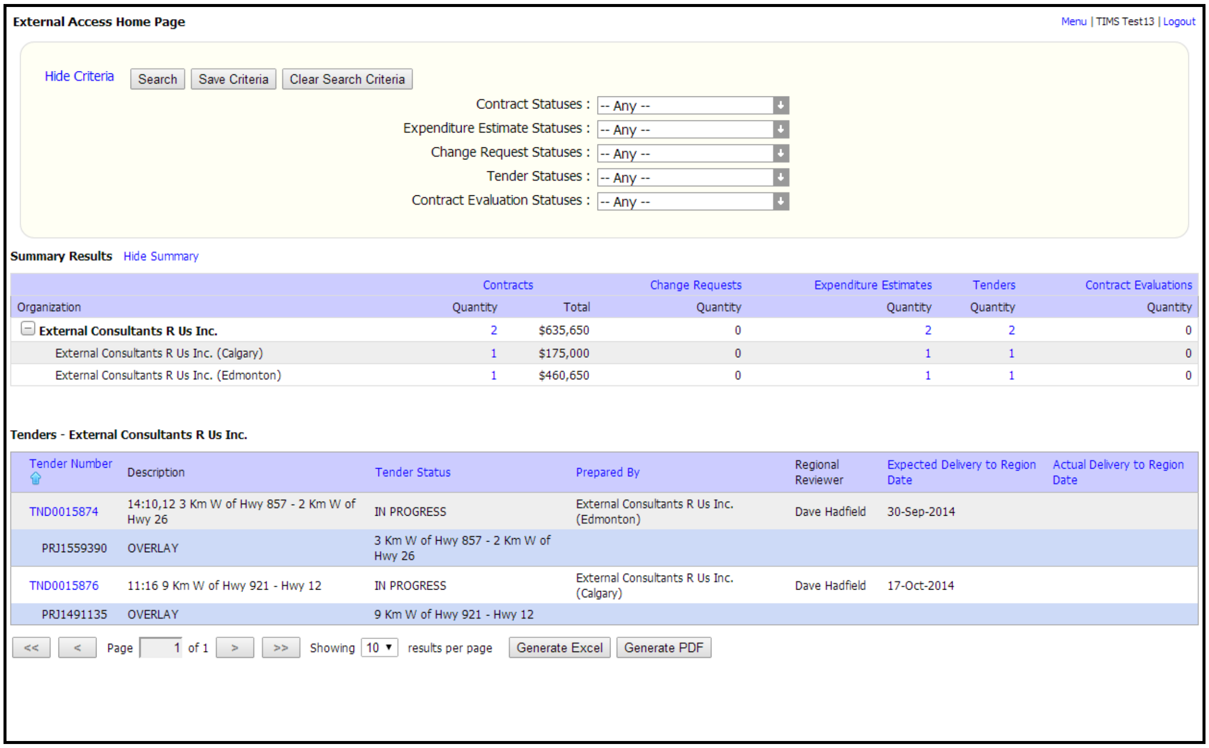


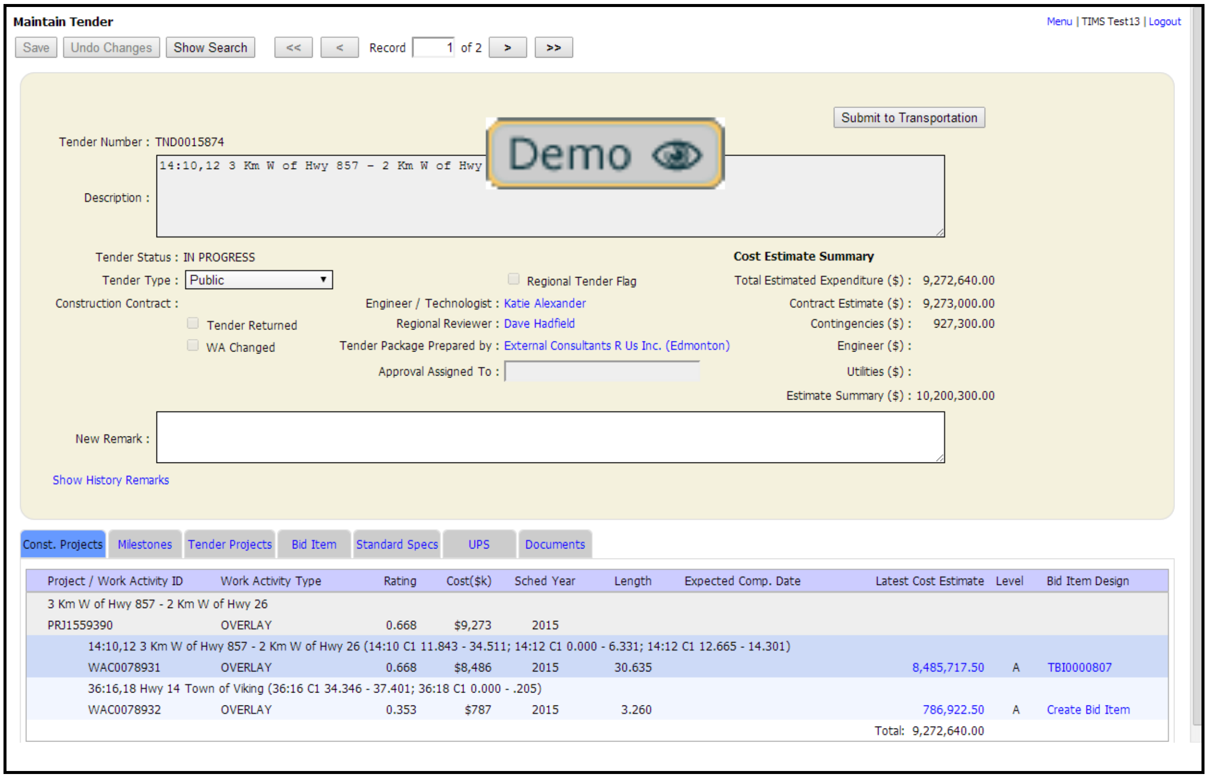
Table 5.1 External Access Home Page - Tender - field definitions

Field	Description
Tender Number	Displays the Tender ID as a clickable link that will open the Maintain Tender screen with the Tender loaded.
Description	A textual description of the Tender. Defaults to the description of the Work Activity that is the Project Driver.
Tender Status	The current status of the Tender (i.e. In Progress, Tender Advertised, Tender Opened, etc.).
Prepared By	The name of the Consulting Engineer or Engineering Consultant Company responsible for completing the Tender package. If this value is not set correctly the engineering consultant company cannot access the Maintain Tender screen.
Regional Reviewer	The name of the individual in the region responsible for reviewing the Tender Package. The Project Sponsor is automatically defaulted into the Regional Reviewer field when the Tender is first created.
Expected Delivery to Region Date	The date when the tender package is anticipated to be delivered to the Transportation Regional office for review.
Actual Delivery to Region Date	The date when the tender package was actually delivered to the Transportation Regional office for review.

Table 5.2 Tender Status - Description

Tender Status	Status Description
Tender has been created in draft form	The tender has been created and is under development but no ‘Actual Dates’ have been entered.
Region is reviewing Tender	The Tender Delivered to Region ‘Actual Date’ has been entered.
Professional Services is reviewing the Tender	The Tender Delivered to PSS ‘Actual Date’ has been entered.
Professional Services has approved the Tender	The Tender Accepted by PSS ‘Actual Date’ has been entered.
Programming has approved the Tender	The Programming Approved ‘Actual Date’ has been entered.
Tender has been advertised to Bidders	The Tender Advertised ‘Actual Date’ has been entered.
Tender has been opened	The Tender Opening ‘Actual Date’ has been entered.
Tender has been awarded	The Regional and CRC Award ‘Actual Date’ has been entered.
Tender has been cancelled	The Cancel button was selected changing the status to ‘Cancelled’. A Tender can only be cancelled when the Tender Status is: Programming Approved, Tender Advertised, or Tender Opened.
Tender has been returned	Indicates either Professional Services - Tender Services has returned the tender to the Region or the Regional Reviewer has returned the tender to the consultant.

Demo 5.1 Access Tenders from the Home Page



How To

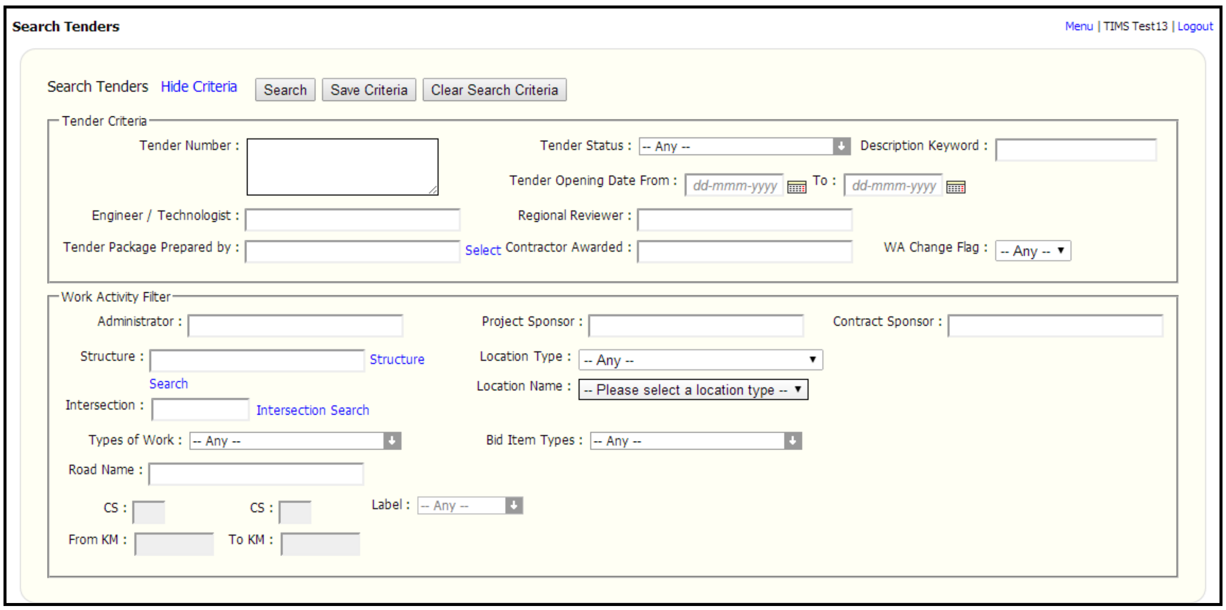
1. From the *External Access Home Page* screen, in the Tenders Quantity column, select an **Tender** value.
2. Select the **Tender Number** link of the appropriate tender.
3. From the *Maintain Tender* screen edit as required.
4. Select the **Save** button.

Search Tenders

The Search Tenders screen allows users to find existing tenders. However, only Tenders where the 'Tender Package Prepared by' matches the organization the user works for, will be listed in the results.

Alert! External Users can only view Tenders where their organization is the value in the 'Tender Package Prepared by' field.

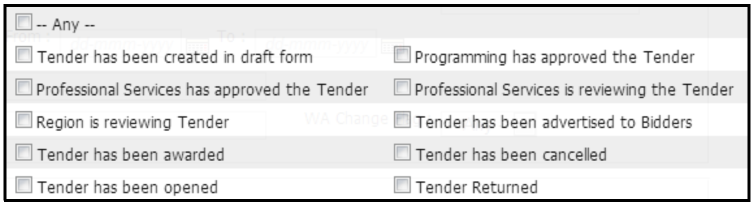
Figure 5.3 Search Tenders screen - blank Criteria



Tender Status Search Criteria

Using the Tender Status can reduce the number of results during a search. The Tender Status criteria field allows the user to select one or more status' that will result in the required tenders being listed. The following table maps the status choices to the tender status values.

Figure 5.4 Search Tenders screen - Tender Status choices



Hint: Select 'Tender has been created in draft form' and 'Tender Returned' to search for tenders requiring action.

Figure 5.5 below uses the Tender Status (In Progress), Regional Reviewer (Ralph Witten) and Structure (74355-2) criteria fields. The more information that can be supplied as criteria, the fewer the results to look through.

Figure 5.5 Search Tenders - Criteria example

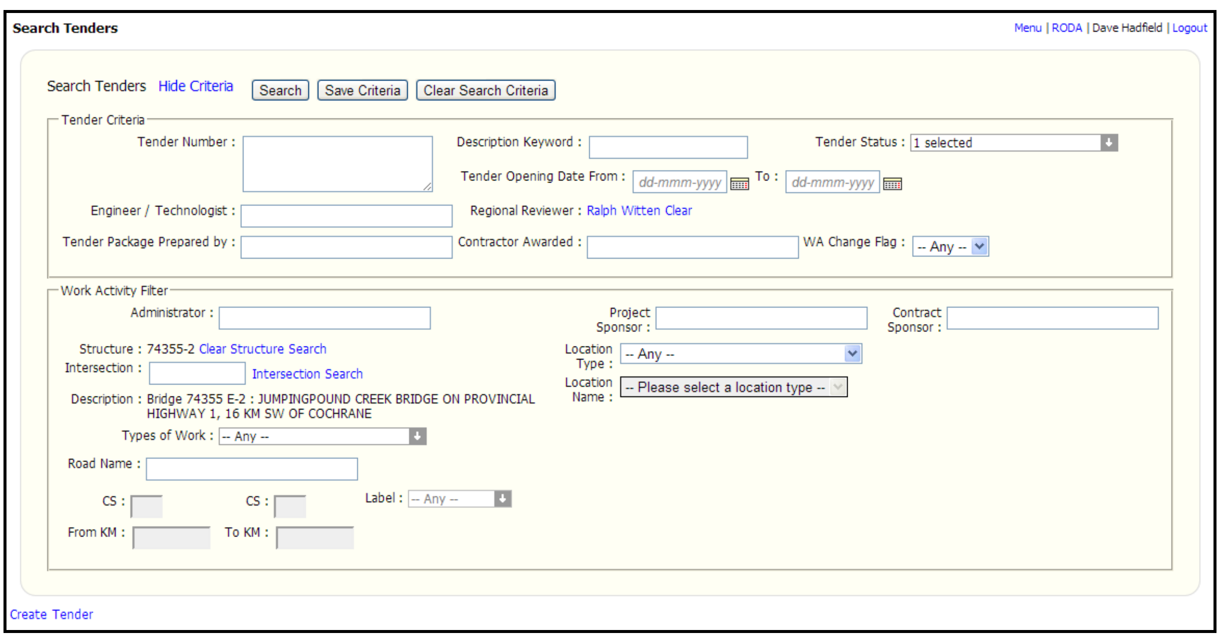


Figure 5.6 Search Tenders - Results - specific criteria

Search Tenders Menu | RODA | Dave Hadfield | Logout

Search Tenders Show Criteria | Hide Results (1 Found)

Tender Number	Description		Eng/Tech	Regional Reviewer	Tender Status
TND0014989	1:06 Jumpingpound Creek Bridge on Provincial Highway 1, 16 Km SW of Cochrane (74355-2)			Ralph Witten	IN PROGRESS
PRJ1045515	BRIDGE-DECK	Jumpingpound Creek Bridge on Provincial Highway 1, 16 Km SW of Cochrane (74355-2)			

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<< < Page 1 of 1 > >> Showing 10 results per page

Create Tender

Figure 5.7 below displays the results when limited criteria is supplied.

Figure 5.7 Search Tenders - Results - limited criteria

Search Tenders Menu | RODA | Dave Hadfield | Logout

Search Tenders Show Criteria | Hide Results (40 Found)

Tender Number	Description		Eng/Tech	Regional Reviewer	Tender Status
TND0010381	785:2 Watercourse Culvert On Hwy 785 Near Pincher Cree (1745-1)			Ralph Witten	IN PROGRESS
PRJ0242171	BRIDGE-REPLACE	Watercourse Culvert on Hwy 785 NEar Pincher Creek (1745-1)			
TND0011000	552:02 S. of the Highwaood River to N. of the Highwaaod River 552:02 B.F. 599 - Carrying Hwy. 552 over the Highwood River, N.E. of Okotoks			Ralph Witten	PSS APPROVED
PRJ0064609	BRIDGE-REPLACE	Highwood River Bridge on Highway 552, 18 Km NE of Okotoks (599-1)			
TND0011003	525:2 EID Irrigation Canal Culvert on Provincial Highway 525 NEar Rolling Hill (78459-2)			Ralph Witten	IN PROGRESS
PRJ0870323	BRIDGE-REPLACE	EID Irrigation Canal Culvert on Provincial Highway 525 Near Rolling Hill (78459-1)			
TND0011066	Culvert Installation 5:04 B.F. 801-2 - Carrying Hwy. 5 over an Unnamed Watercourse, N.E. of Cardston			Ralph Witten	PSS APPROVED
PRJ0840870	BRIDGE-REPLACE	Watercourse Culvert on Provincial Highway 5 Near Cardston (801-1)			
TND0011067	786:2 Crowlodge Creek Culvert on Provincial Highway 786 NEar Brocket (13320-1)			Ralph Witten	IN PROGRESS
PRJ0894826	BRIDGE-REPLACE	Crowlodge Creek Culvert on Provincial Highway 786 Near Brocket (13320-1)			
TND0011238	887:2 Canal Creek Bridge on Provincial Highway 887 NEar Orion (7097-1)			Ralph Witten	PSS REVIEW
PRJ0241039	BRIDGE-REPLACE	Canal Creek Bridge on Provincial Highway 887 Near Orion (7097-1)			
TND0011249	544:2 EID Irrigation Canal Culvert on Provincial Highway 544 NEar Duchess (78432-1)			Ralph Witten	IN PROGRESS
PRJ0894145	BRIDGE-REPLACE	EID Irrigation Canal Culvert on Provincial Highway 544 Near Duchess (78432-1)			
TND0011396	2:15 CPR and CNR Overpass on Deerfoot Trail, At Calgary (NBL)			Ralph Witten	IN PROGRESS
TND0011397	3:9 Highway 25 Over Highway 3 Interchange, At NW Boundary of Lethbridge (76177-1)			Ralph Witten	IN PROGRESS
PRJ0019993	BRIDGE-DECK	Highway 25 Over Highway 3 Interchange, At NW Boundary of Lethbridge (76177-1)			
TND0011403	L.R. M.D. 8 B.F. 167 - Carrying a Lcal Road over the Bow River at Canmore 22:10 B.F. 1741 - Carrying Hwy. 22 over the Highwood River, S. of Longview		Rhett Hardy	Ralph Witten	TENDER AWARDED
PRJ0019985	BRIDGE-DECK	Bow River Bridge, on Highway 742 At Canmore (167-1)			

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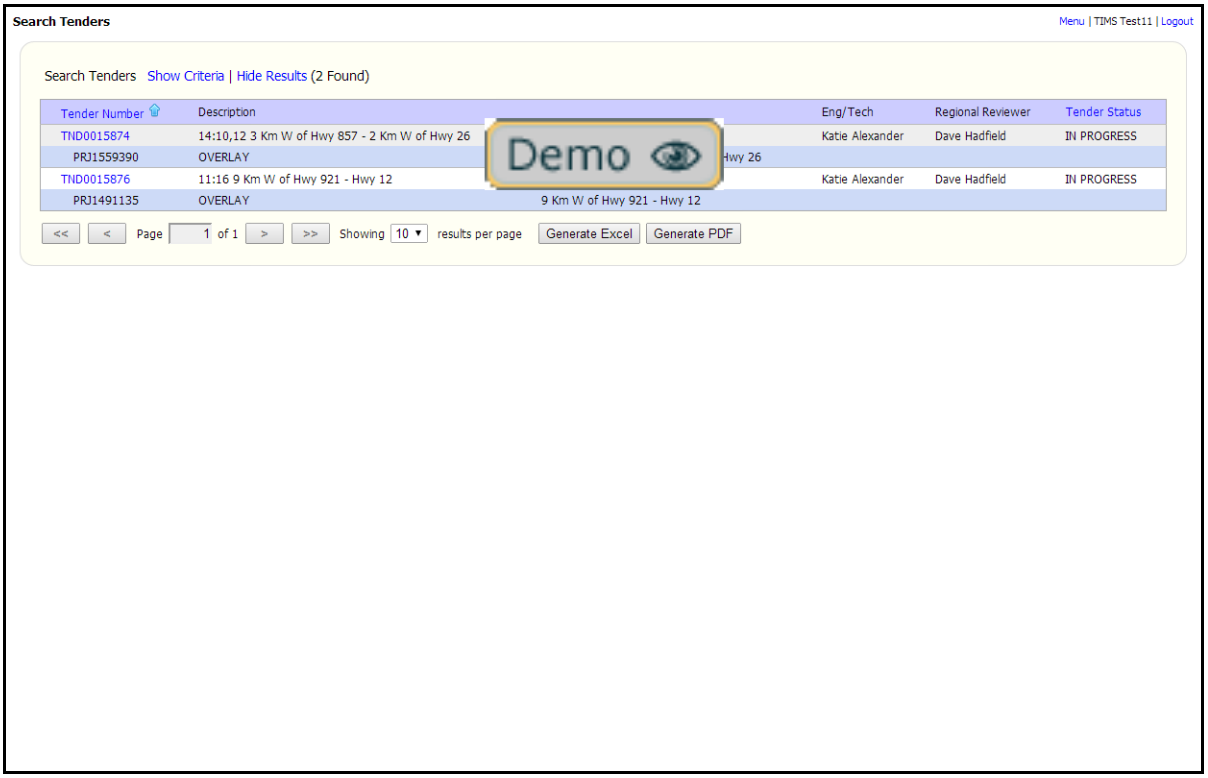
<< < Page 1 of 4 > >> Showing 10 results per page

Demo 5.2 Search for Tenders



How To

1. From the PMA Delivery *Main Menu*, select **Search Tenders** option.
2. Enter or select enough criteria to retrieve the Tenders required.
3. Select the **Search** button.
4. From the list of results, select the **Tender Number** for the required Tender.

Search for Returned Tenders

After the Project Administrator reviews the Draft Tender Package they will use email to notify the consultant that the Tender has been returned with comments. The Status of the Tender will be Tender Returned. This can be used to find the Draft Tender Packages that have been returned from the Project Administrator.

Figure 5.8 External Access Home Page screen - Tender Returned status

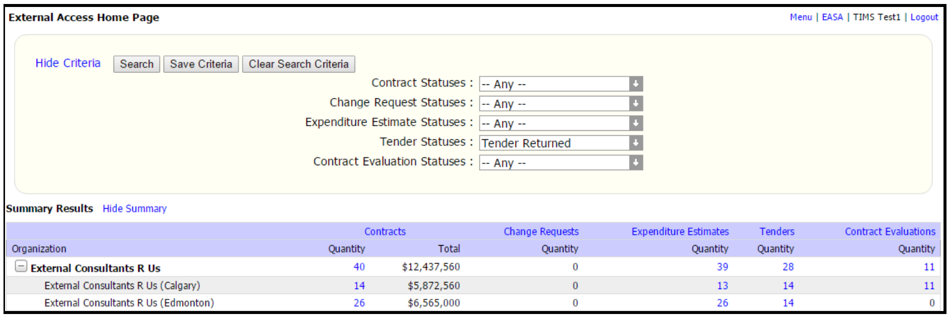
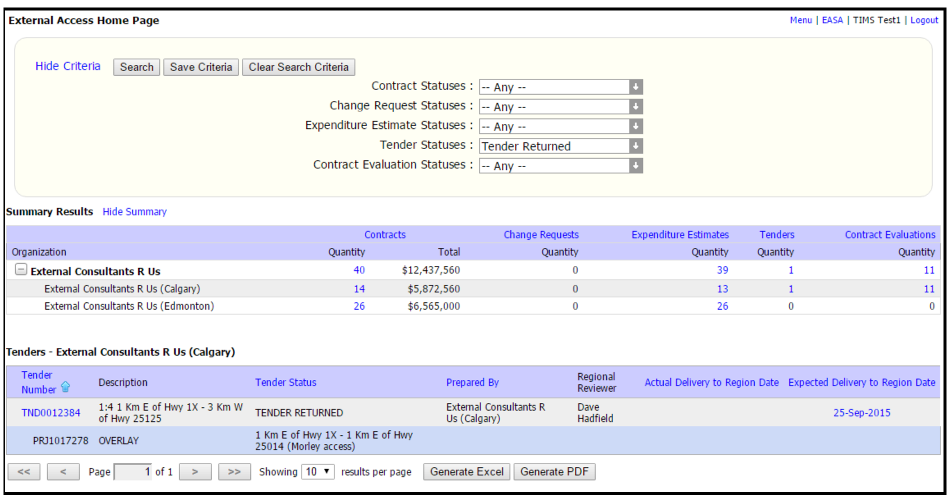


Figure 5.9 External Access Home Page screen - Tender Returned list



Chapter 6: Create Tender Package

This chapter covers the steps in creating a Tender Package. Creating the tender package is performed by the Consultant.

Topics in Chapter:

1. Tender Package Background

Tender Package Background

Creating the Tender Package is typically done by the consultant engineer. The consultant is contracted to perform the activities required to define the design of the construction project. This will require one or more of the following activities: preliminary engineering, detailed design, construction tender package preparation, identification and negotiation for any new right of way requirements, identifying and requesting movement of utilities and construction supervision.

The Tender Package is created externally to PMA Delivery.

Alert!	In a future release when Consultants can access PMA Delivery: they will enter the Bid Items, Standard Specification Manuals and Unit Price Schedule. Until that time, the Project Administrator receiving the Tender Package will make these entries.

Chapter 7: Maintain Tender Screen

This chapter only goes so far as defining the fields on the Maintain Tender screen including the Construction Projects, and Milestones tabs. Subsequent chapters will cover the tabs of importance to Engineering Consultants and how to interact with the screen.

Topics in Chapter:

1. Maintain Tender Screen
2. Construction Projects Tab
3. Milestones Tab

Maintain Tender Screen

The Maintain Tender screen is used by consultants to view and enter information.

Figure 7.1 Maintain Tender screen – General fields

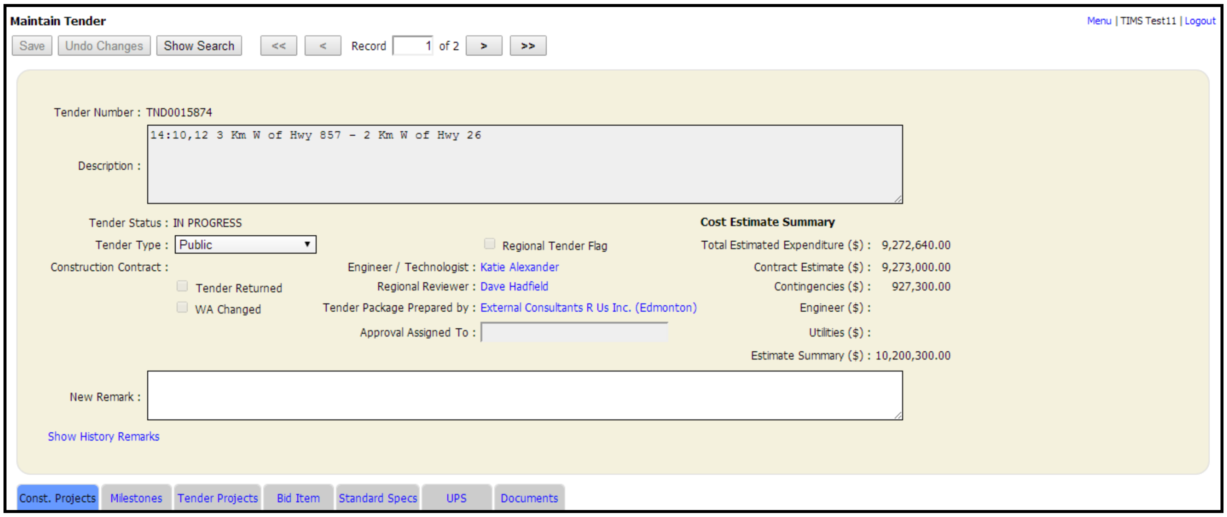


Table 7.1 Maintain Tender General - field definitions

Field	Description
Show Search (button)	This button takes the user back to the search results.
Tender Number	This is a unique identifier that is system generated and display only. TND000001
Description	A textual description of the Tender. Defaults to the description of the Work Activity that is the Project Driver.
Tender Status	The current status of the Tender (i.e. In Progress, Tender Advertised, Tender Opened, etc.).
Tender Type	The Type of Tender (i.e. Public, Invitational, Sole Source & Negotiated Agreement).
Regional Tender Flag	Indicates whether or not the Tender was created and approved in the Region.
Construction Contract	Displays the Construction Contract number (CON0000001). If the contract does not yet exist, the field is blank.
Tender Returned	If the Region returns the Tender to the Consultant for changes/additional work, the box is checked. If PS Tender Services returns the Tender to the Region for changes/additional work, the box is checked. This changes the Status of the Tender to 'Tender Returned'.

Table 7.1 Maintain Tender General - field definitions

Field	Description
Work Activity Changed	If changes are made on the Maintain Work Activity screen after the tender was last saved, this field is automatically checked by PMA Delivery.
Engineer / Technologist	The name of the individual in Professional Services - Tender Services responsible for reviewing the Tender Package.
Regional Reviewer	The name of the individual in the region responsible for reviewing the Tender Package. The Project Sponsor is automatically defaulted into the Regional Reviewer field when the Tender is first created.
Tender Package Prepared By	The name of the Consulting Engineer or Engineering Consultant Company responsible for completing the Tender package. If this value is not set correctly the engineering consultant company cannot access the Maintain Tender screen.
Approval Assigned To	During the approval process - displays the name of the Approver where the tender currently rests.
Total Estimated Expenditure	This is the value of all construction work activity costs for the latest cost estimates related to the construction project(s) in the Tender. This does NOT include any Bid Items that are ‘Excluded from the Net Amount’.
Contract Estimate	This is the Total Estimated Expenditure rounded to the nearest thousand dollars.
Contingencies	This is a calculated amount valued at 10% of the Contract Estimate.
Engineer (future)	This is a value that (in the future) will display the sum of all Consulting work activities related to the Construction Work Activities.
Utilities (future)	This is a value that (in the future) will display the sum of all Utility (type) work activities related to the Construction Work Activities.
Estimate Summary	A total of Contract Estimate, Contingencies, Engineering and Utilities.
New Remarks	Used to enter text that explains any changes or updates made at the time.
Show History Remarks	A Show/Hide link to display the history of all Remarks made during the development of the Tender.

Construction Projects Tab

The Construction Projects tab displays the construction work to be tendered. When the tender was created by the Project Administrator using the Terms of Reference: the work activities were copied from the TOR to the Tender.

Figure 7.2 Maintain Tender screen – Construction Projects tab

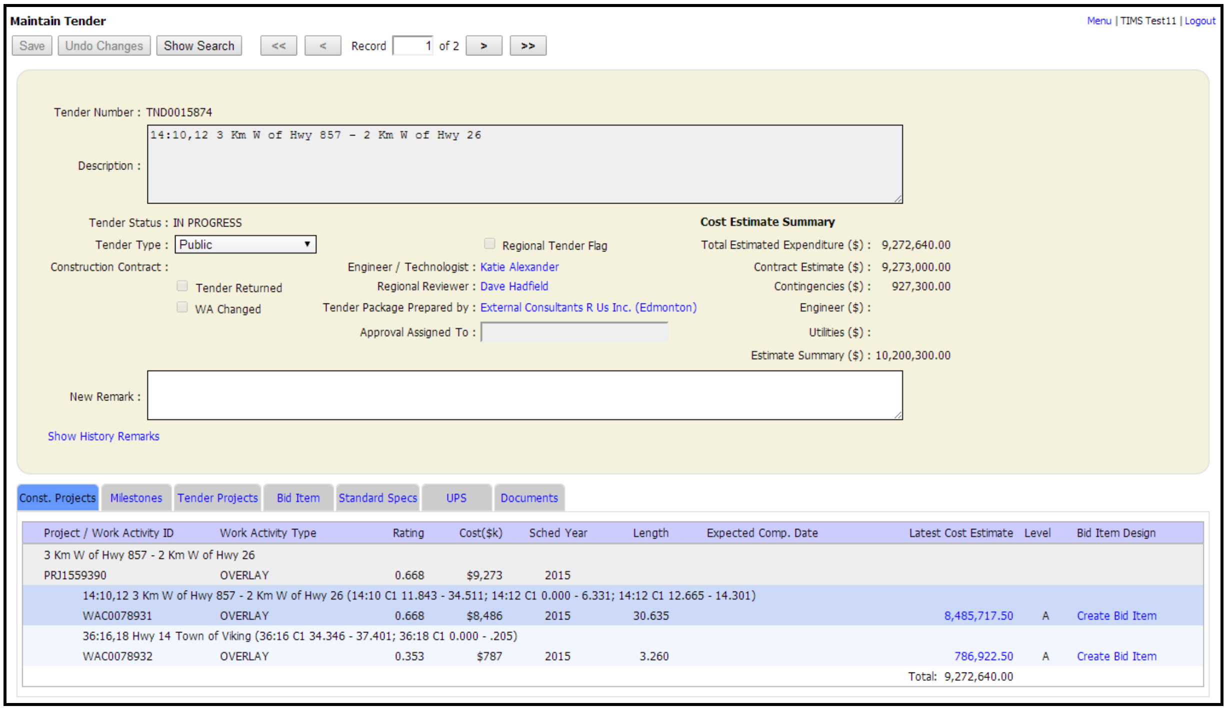


Table 7.2 Maintain Tender Construction Projects tab - field definitions

Field	Description
Project / Work Activity ID	This is a unique identifier that is system generated (i.e. PRJ000001, WAC0000001).
Work Activity Type	The type (i.e. deck rehab, replace bridge, grading, overlay, 6-laning, etc.) of work involved in the work activity.
Rating	This is the Benefit Cost Rating. The rating is a calculation intending to show, for each dollar spent, the expected dollar return.
Cost ($K)	This is the amount (to the nearest thousand dollars) that each Work Activity is estimated to cost.
Scheduled Year	This is the year, according to RODA calculations and any manual overrides, when the work is scheduled to begin.
Length	For work involving a distance/length (i.e. overlay) the amount in kilometres (to 3 decimal places) is displayed.

Table 7.2 Maintain Tender Construction Projects tab - field definitions

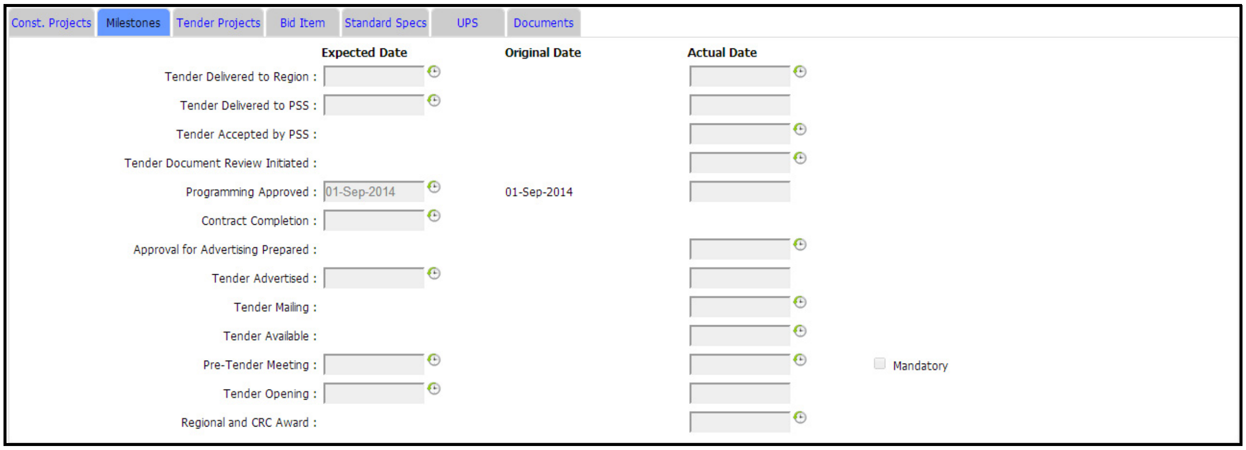
Field	Description
Expected Completion Date	This is the date (from the Maintain Work Activity screen - Completion ‘Expected Date’) when the work activity is anticipated to be completed.
Latest Cost Estimate	This is the amount (in dollars and cents) that each Work Activity is estimated to cost. The amount is a link used to enter the ‘C’ level estimated costs.
Level	Indicates the Level of the Latest Cost Estimate (A, B, C, D).
Level History button	Displays the history of Cost Estimates for the Work Activity. This includes the Level and Cost for each change.
Bid Item Design	Displays either a TBI Id (TBI0000001) or a Create Bid Item link. Selecting either will display the Maintain Bid Item Design screen with the Tender Bid Item (TBI) loaded or the Create Bid Item Design screen.

Alert! On the Construction Projects tab, the only links available to engineering consultants are in the ‘Latest Cost Estimate’ and ‘Bid Item Design’ columns.

Milestones Tab

The Milestones tab is used; to forecast when a milestone is Expected to be reached and later, to record the date when the milestone was Actually reached.

Figure 7.3 Maintain Tender screen – Milestones tab



Only specific security roles have the ability to complete Milestone date fields.

Table 7.3 Maintain Tender Milestones tab - field definitions

Field	Description
Tender Delivered to Region	The Tender Package has been delivered to the Regional Reviewer.
Tender Delivered to PSS	The Tender Package has been delivered to the Engineer/ Technologist.
Tender Accepted by PSS	PS Tender Services has accepted the tender package.
Tender Document Review Initiated	PS Tender Services has begun the review of the tender document
Programming Approved	Programming has approved the tender in so far as funding for the tender is available.
Contract Completion	The expected completion date of the construction contract. This date is used to populate a field in the Tender Document.
Approval for Advertising Prepared	The advertising prepared for the Tender, has been approved.
Tender Advertised	The tender has actually been advertised.
Tender Mailing	The tender has been mailed to a distribution point (Regional office or third party).
Tender Available	The tender has arrived at the distribution point and is available to interested parties (i.e. Contractors).
Pre-Tender Meeting	If applicable, the pre-tender meeting has been conducted.

Table 7.3 Maintain Tender Milestones tab - field definitions

Field	Description
Pre-Tender Meeting Mandatory	Indicates attendance at the pre-tender meeting as mandatory for all bidders or not.
Tender Opening	The date when the tender opening took place.
Regional and CRC Award	The date when the Region and/or Contract Review Committee awarded the tender.

Chapter 8: Maintain Tender Bid Item Design Screen

This chapter only goes so far as defining the fields on the Maintain Bid Item Design screen including the Bid Items, and History tabs. This chapter also covers the Bid Item Details window. The following chapter covers creating Tender Bid Items in various ways and how to interact with the screen.

Topics in Chapter:

1. Tender Bid Item Background
2. Tender Bid Item Tab
3. Maintain Bid Item Design Screen
4. Bid Items Tab
5. Bid Item Details Window
6. History Tab

Tender Bid Item Background

A Tender Bid Item is actually a group of Bid Items. Collectively, the group of Bid Items define the resources required to realize the completion of a Work Activity. For example, an overlay work activity may contain bid items for Mobilization, Site Occupancy, Cutting of Pavement, Cold Milling, Asphalt Concrete Pavement, Culverts - Supply and Install, Painted Pavement Messages, etc.). Each Bid Item will have a quantity identified (i.e. Cutting of Pavement - 675 meters, Cold Milling - 168600 square meters, Asphalt Concrete Pavement - 25,100 tonnes). Each Bid Item will have a Unit Price (i.e. $1.37/tonne, $30.70/hour, etc.). When all of the quantities and prices are calculated and totaled, we have a 'C' Level Estimate for the Work Activity. When all of the Work Activities have a 'C' Level Estimate, we have the 'C' Level Cost Estimate of the Tender.

See: *See **"Bid Item Terminology" on page 8-3 for additional information.***

As Bid Items are entered against the Tender, Standard Specification Manuals are automatically added to the Standard Spec tab of the Tender. A correlation between Bid Item types and Standard Specifications was previously established. Therefore, as each Bid Item is added to the Tender, so are the appropriate Standard Specs.

Alert! You can only create one Tender Bid Item ID per Construction Work Activity. Each Tender Bid Item Id (TBI0000001) may contain one or more actual Bid Items.

There can be more than one way or more than one type of material that can be used to complete a work activity, and for each method there are different bid items required. When this situation is encountered, alternatives are created for each method - each identifying the bid items required.

Hint: Alternatives may be required due to different grades of materials (i.e. Asphalt Concrete Pavement comes in several types) being considered.

No matter how the Tender Bid Items are organized, a single list of bid items or multiple lists (alternatives) of bid items, each list will become a Unit Price Schedule (UPS).

See: *See **"Create Tender Unit Price Schedule" on page 13-1 for additional information.***

The Maintain Bid Item Design screen lends itself to any number of list combinations. If there is only one bid item list (Single UPS) the following does not apply. Alternatives can have some overlapping bid items (a bid item that appears in more than one alternative). If there are bid items that appear in all of the alternatives the UPS Design option of Common plus Alternatives can be used. This allows the user to identify the bid items that are common to all alternatives once and then create each alternative with distinct bid items applicable to the alternative.

See: *See **"UPS Design Field" on page 8-8 for additional information.***

Tender Bid Item Tab

The Bid Item tab contains a link to 'Create Bid Item'. The Bid Item tab is used to create and edit Tender Bid Items. The tab lists any existing Tender Bid Items and some general information about each.

Hint: The 'Create Bid Item' link can also be found on the Construction Projects tab to the right of each Work Activity.

Figure 8.1 Maintain Tender screen – Bid Items tab

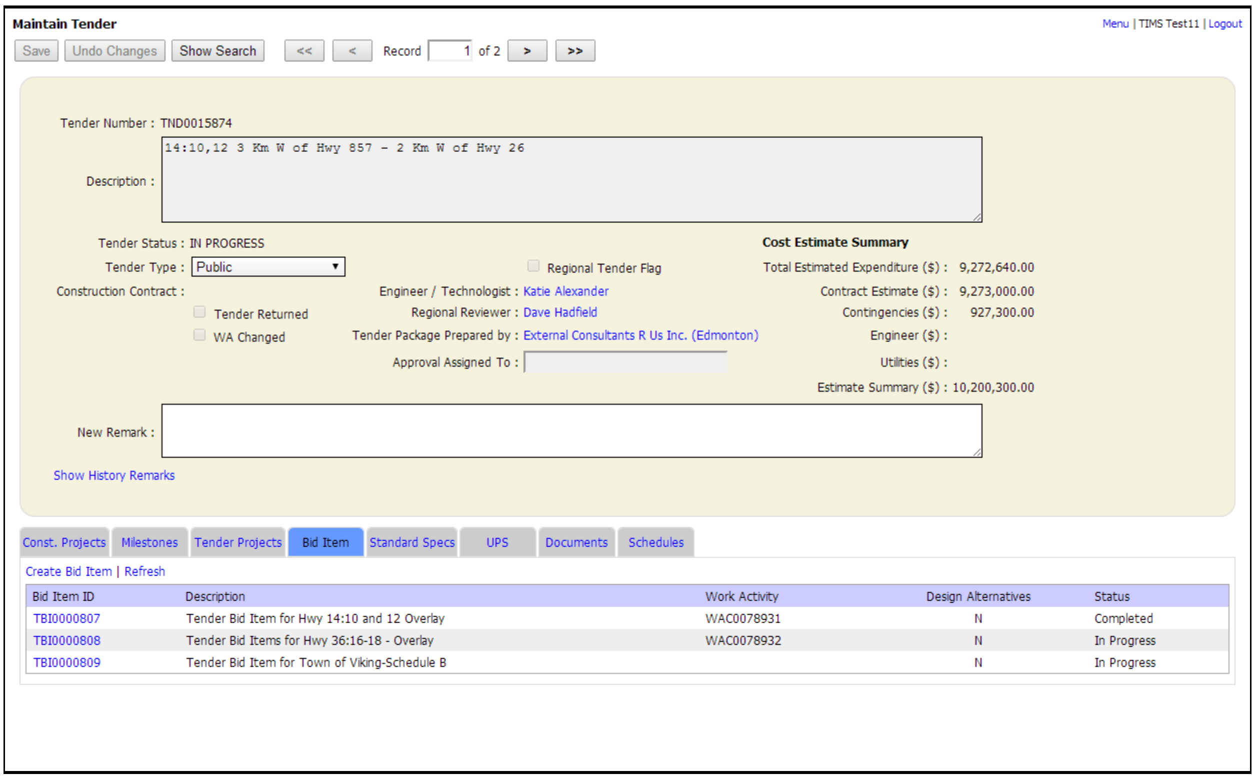


Table 8.1 Maintain Tender screen - Bid Items tab - field definitions

Field	Description
Create Bid Item (button)	This button allows the user to create a new Tender Bid Item.
Refresh (button)	This button refreshes the tab to display the latest information.
Bid Item ID	Displays the Id as a clickable link to the Maintain Bid Item Design screen for the bid item (TBI000001).
Description	Displays the description entered on the Maintain Bid Item Design screen.

Table 8.1 Maintain Tender screen - Bid Items tab - field definitions

Field	Description
Work Activity	Displays the Id for the construction work activity (WAC0000001).
Design Alternatives	Displays whether or not (Y/N) Alternatives were used in the Tender Bid Item design.
Status	Displays the Status (In Progress, Completed, Removed) of the Tender Bid Item.

Maintain Bid Item Design Screen

The Maintain Bid Item Design screen is used to build (design) the collection of bid items required to accomplish each Work Activity of the Tender. The 'collection', known as the Tender Bid Item, is given an ID (i.e. TBI0000001).

Hint: A Tender Bid Item can be deleted on the Maintain Bid Item Design screen. If after saving, it is determined that the Tender Bid Item is not required, use the Delete button.

Figure 8.2 Maintain Bid Item Design screen – General fields

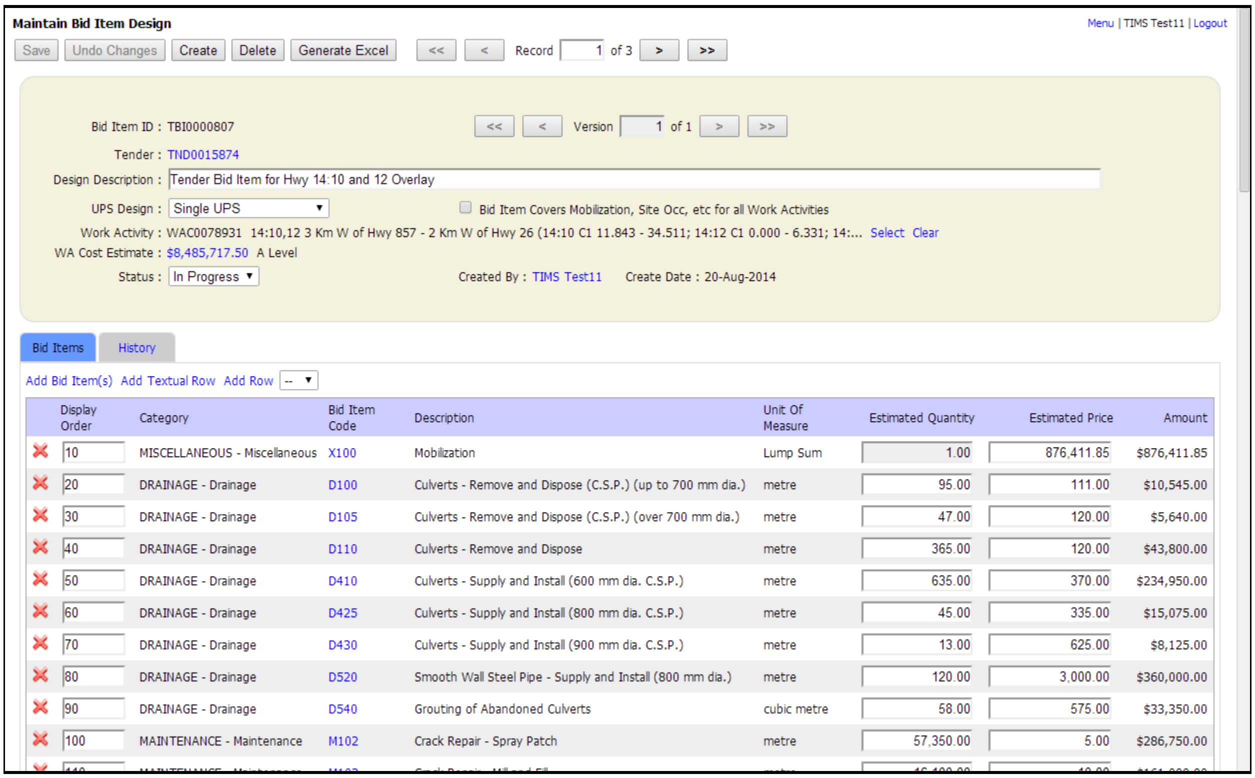


Table 8.2 Maintain Bid Item Design - general field definitions

Field	Description
Save (button)	This button allows the user to generate a Tender Bid Item Id and subsequently save updates to the Tender Bid Item.
Undo Changes (button)	This button takes the user back to the last time the screen was saved.
Create (button)	This button generates a new Tender Bid Item.

Table 8.2 Maintain Bid Item Design - general field definitions

Field	Description
Delete (button)	This button will delete the Tender Bid Item and can be used up until the Tender receives a Tender Advertised 'Actual Date' (see Removed Status).
Generate Excel (button)	This button generates an Excel file with the data from each tab on the screen. The file has a worksheet for each Bid Item tab.
Bid Item ID	This is a unique identifier that is system generated and display only (TBI000001).
Version	Displays the version of the Tender Bid Item being viewed. Applicable for addenda.
Tender	Displays the Id as a clickable link to the Maintain Tender screen (TND000001).
Design Description	A textual description of the Tender Bid Item. The description is mandatory and must be entered prior to saving a new Tender Bid Item.
UPS Design	A drop down list that identifies the Unit Price Schedule Type (i.e. Single UPS, Alternatives, Common & Alternatives).
Bid Item Covers Mobilization... (check box)	Indicates if the Bid Item Design includes mobilization and other bid items that apply to all work activities on the tender. The value of the Bid Items will be pro-rated across all of the work activities on the tender when the system automatically generates C and D Level Estimates. Therefore, an individual work activity (next field) cannot be selected.
Work Activity/Job ID	Identifies the Construction Work Activity impacted by the Tender Bid Item Design. The Work Activity description is also displayed. Identifies the Job Coster impacted by the Tender Bid Item Design.
Work Activity Cost Estimate	If a Work Activity was specified (above), the dollar amount and Cost Level (A, B, C) are displayed.
Status	A drop down list that identifies the Status (In Progress, Completed, Removed) of the Tender Bid Item.
Created By/Date	Displays the individual who created the Tender Bid Item and the date and time.

UPS Design Field

The UPS Design drop down field is used to identify how the Unit Price Schedule is to be organized. There may be one schedule (single) or there may be multiple schedules mainly due to alternative lists of Bid Items.

The UPS Design that is selected will impact the UPS tab on the Maintain Tender screen and ultimately how the UPS Sections will be constructed. For example, there will be one UPS Section created for each Alternative in the Bid Item Design.

Alert! The UPS Design cannot be changed if the Tender Bid Item has been added to a UPS ID.

Figure 8.3 Maintain Bid Item Design screen – UPS Design field

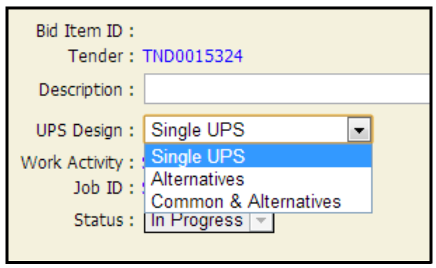


Table 8.3 Maintain Bid Item screen UPS Design - field definitions

Field	Description
Single UPS	Used to build a single list of bid items for the work activity identified.
UPS for each Alternative	Used when alternative lists of bid items are required. Each Alternative becomes a tab on the Maintain Bid Item Design screen and each Alternative will become a UPS Section.
UPS for Common & UPS for each Alternative	Used when some bid items are common across all alternatives. A tab for Common Bid Items will display the bid items applicable to all Alternatives. Bidders will respond to combinations of the ‘Common’ UPS Section and one or more Alternative UPS Sections.

Alert! If the UPS Design is not Single UPS then a Work Activity must be identified.

Bid Item Status Field

As the Tender Bid Item moves from creation through to completion, the status is manually changed by the user. Completed is used when entry of the Tender Bid Item is finished. When all Tender Bid Items in the Tender are set to Completed, the ability to update the Cost Estimate to a 'C' Level is available. Removed can only be used after the Tender has been advertised. Use the Delete button (top of the screen) to completely erase the Tender Bid Item (like it never existed).

Figure 8.4 Maintain Bid Item Design screen – Bid Item Status field

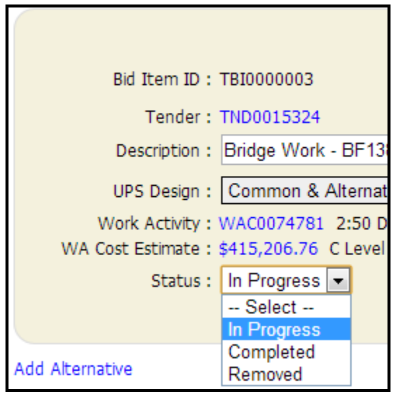


Table 8.4 Maintain Bid Item screen Status - field definitions

Field	Description
In Progress	Indicates that the Tender Bid Item is under development.
Completed	Sets the Status of the Tender Bid Item to 'Completed'. When a Tender Bid Item identifies a Work Activity and is completed, the 'C' Level Estimate is created automatically when the Single UPS Design is used.
Removed	Sets the Status of the Tender Bid Item to 'Removed'. Tender Bid Items can be removed after the Tender Advertised 'Actual Date' has been entered (on the Milestones tab). This helps to record how the Tender Bid Item was part of the original Tender but was later removed during an Addendum.

Alert! When Alternatives are used in the Tender Bid Items, the 'C' Estimates are not automatically generated. The choice of which Alternative is to be used as the C Estimate is made manually.

Figure 8.5 Maintain Bid Item Design screen - Single UPS Completed msg

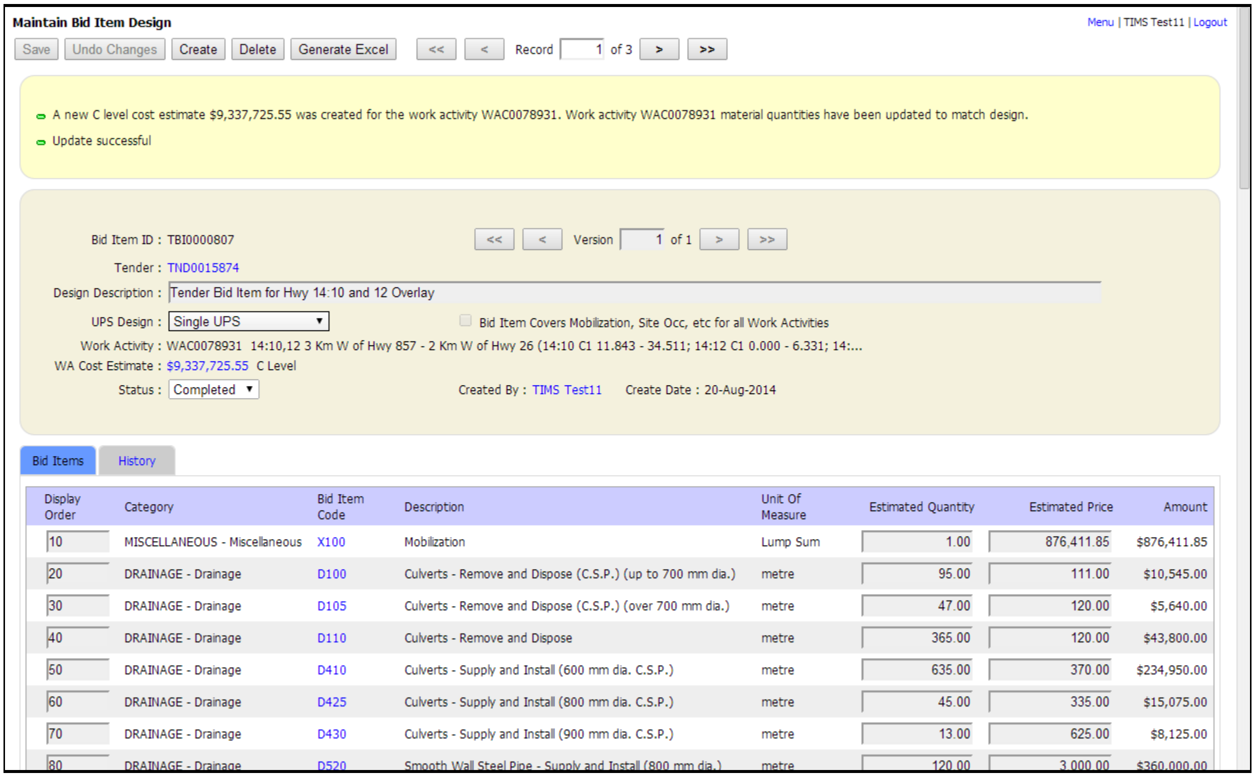


Figure 8.6 Maintain Bid Item Design screen - Remove Error msg

Bid Items Tab

The Bid Items tab on the Maintain Bid Item Design screen is used to build the list of Bid Items that are applicable to the Tender Bid Item (TBI).

Hint: The definitions below apply to the Bid Items tab, the Common Bid Items tab and/or the Alternatives tab.

Figure 8.7 Maintain Bid Item Design screen - Bid Items tab

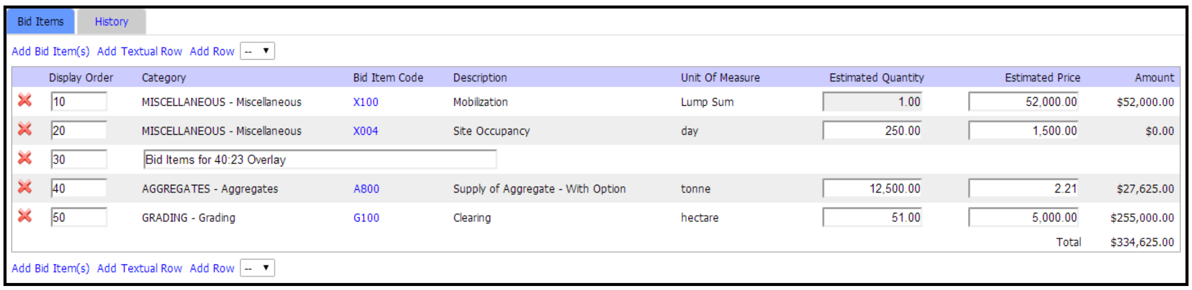


Table 8.5 Maintain Bid Item Design screen - Bid Item tab field definitions

Field	Description
Add Bid Item (button)	This button allows the user to search for Bid Items to add to the Tender Bid Item. The Search Bid Items screen is displayed.
Add Textual Row (button)	This button allows the user to enter a line of text into the list. The text can be used to group/categorize common types of bid items.
Add Row (button)	This button adds a blank row to the list. Useful if you know the Bid Item code. The drop down will add 1, 2, 3, 4, 5, 10, 15, or 20 rows at one time.
Delete (button)	Flags the Bid Item for removal from the list. Save may be required to complete the Deletion.
Display Order	The system automatically assigns a precedence number to each new row. These values can be manually over-written to change the order of the Bid Items. Saving the Maintain Bid Item Design screen will sort the Bid Items based on the Display Order.
Category	Displays the Bid Item Category that the selected Bid Item belongs to (Aggregates, Base, Drainage, Environmental, Bridges, Grading etc.).
Bid Item Code	Displays the Id as a clickable link to the *Bid Item Details* window.
Description	A textual description of the Bid Item. Displays the description entered in the Bid Item table.

Table 8.5 Maintain Bid Item Design screen - Bid Item tab field definitions

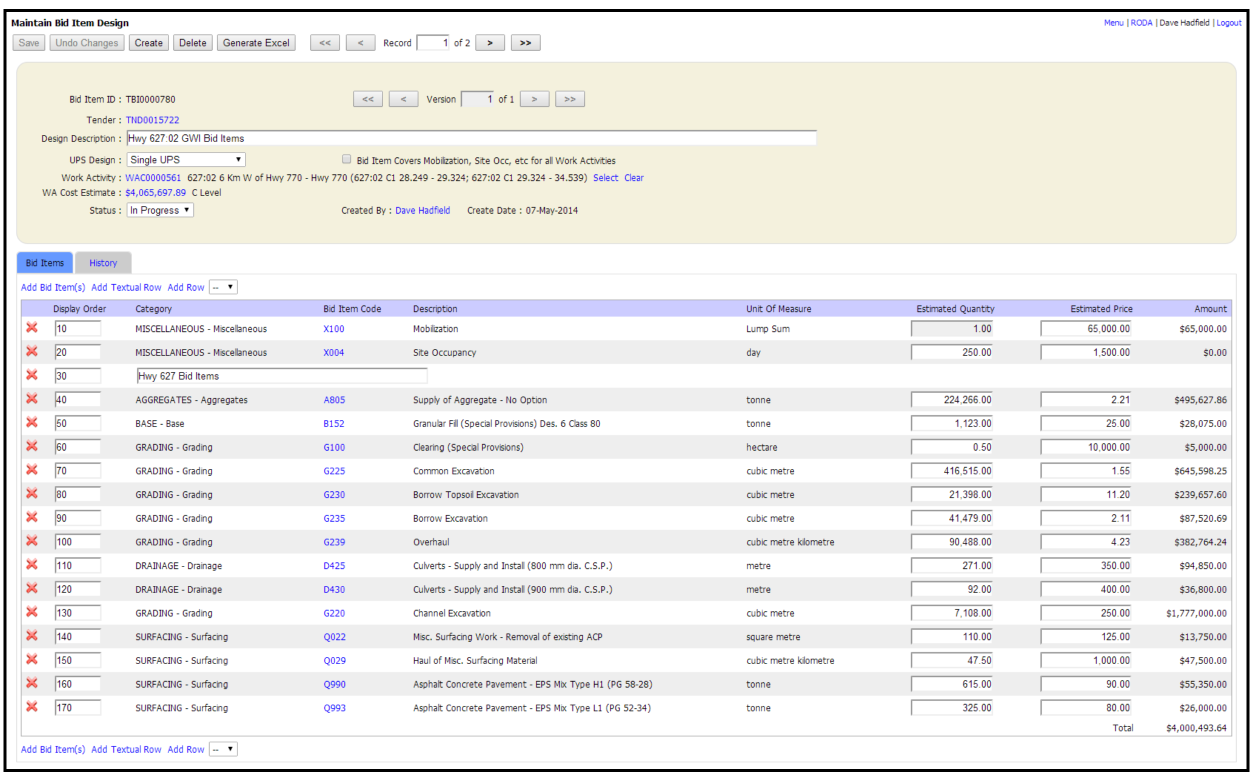
Field	Description
Unit of Measure	The Unit of Measure (litres, kilometres, tonnes, days, hours cubic metres, etc) for the Bid Item used.
Estimated Quantity	The estimated number of units required.
Estimated Price	This is the estimated price per unit.
Amount	Displays the calculated amount of estimated quantity times estimated price.
Total	This is the sum of all Amounts in dollars and cents.

Add Textual Row

Adding a Textual Row is useful later on in the Unit Price Schedule Section. If there are multiple Tender Bid Items that will be included in the same UPS Section as 'Separate' Bid Items - inserting textual rows is a good idea.

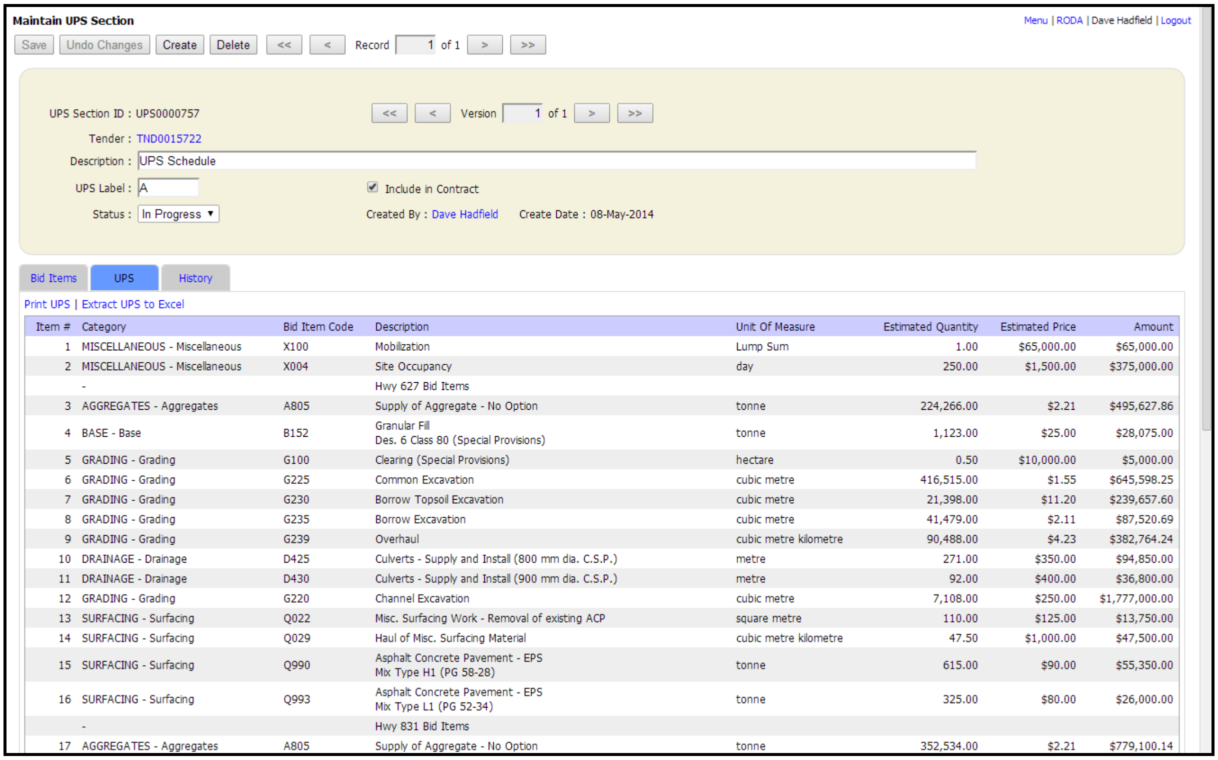
Figure 8.8 below shows how the Tender Bid Item was created with a Textual Row. Figure 8.9 on page 13 shows the results of placing this Tender Bid Item into a UPS Section with a UPS Option of Separate.

Figure 8.8 Maintain Bid Item Design screen – with Textual Row



Hint: Textual Rows do not receive an Item # in the Unit Price Schedule.

Figure 8.9 Maintain UPS Section screen - Textual Rows



Maintain UPS Section

Menu | RODA | Dave Hadfield | Logout

Save | Undo Changes | Create | Delete | << | < | Record 1 of 1 | > | >>

UPS Section ID : UPS0000757

<< | < | Version 1 of 1 | > | >>

Tender : TND0015722

Description : UPS Schedule

UPS Label : A

Include in Contract

Status : In Progress

Created By : Dave Hadfield

Create Date : 08-May-2014

Bid Items | UPS | History

Print UPS | Extract UPS to Excel

Item #	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
1	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	$65,000.00	$65,000.00
2	MISCELLANEOUS - Miscellaneous	X004	Site Occupancy	day	250.00	$1,500.00	$375,000.00
	-		Hwy 627 Bid Items				
3	AGGREGATES - Aggregates	A805	Supply of Aggregate - No Option	tonne	224,266.00	$2.21	$495,627.86
4	BASE - Base	B152	Granular Fill Des. 6 Class 80 (Special Provisions)	tonne	1,123.00	$25.00	$28,075.00
5	GRADING - Grading	G100	Clearing (Special Provisions)	hectare	0.50	$10,000.00	$5,000.00
6	GRADING - Grading	G225	Common Excavation	cubic metre	416,515.00	$1.55	$645,598.25
7	GRADING - Grading	G230	Borrow Topsoil Excavation	cubic metre	21,398.00	$11.20	$239,657.60
8	GRADING - Grading	G235	Borrow Excavation	cubic metre	41,479.00	$2.11	$87,520.69
9	GRADING - Grading	G239	Overhaul	cubic metre kilometre	90,488.00	$4.23	$382,764.24
10	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	271.00	$350.00	$94,850.00
11	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	92.00	$400.00	$36,800.00
12	GRADING - Grading	G220	Channel Excavation	cubic metre	7,108.00	$250.00	$1,777,000.00
13	SURFACING - Surfacing	Q022	Misc. Surfacing Work - Removal of existing ACP	square metre	110.00	$125.00	$13,750.00
14	SURFACING - Surfacing	Q029	Haul of Misc. Surfacing Material	cubic metre kilometre	47.50	$1,000.00	$47,500.00
15	SURFACING - Surfacing	Q990	Asphalt Concrete Pavement - EPS Mix Type H1 (PG 58-28)	tonne	615.00	$90.00	$55,350.00
16	SURFACING - Surfacing	Q993	Asphalt Concrete Pavement - EPS Mix Type L1 (PG 52-34)	tonne	325.00	$80.00	$26,000.00
	-		Hwy 831 Bid Items				
17	AGGREGATES - Aggregates	A805	Supply of Aggregate - No Option	tonne	352,534.00	$2.21	$779,100.14

Bid Item Details Window

The Bid Item Details window is accessed by clicking the Bid Item Code on any of the tabs (Bid Item tab, Common tab, Alternative 1 tab, etc.). The window provides access to the detailed attributes not editable or visible on the bid item tabs.

Figure 8.10 Maintain Bid Item Design screen - Bid Item Details window

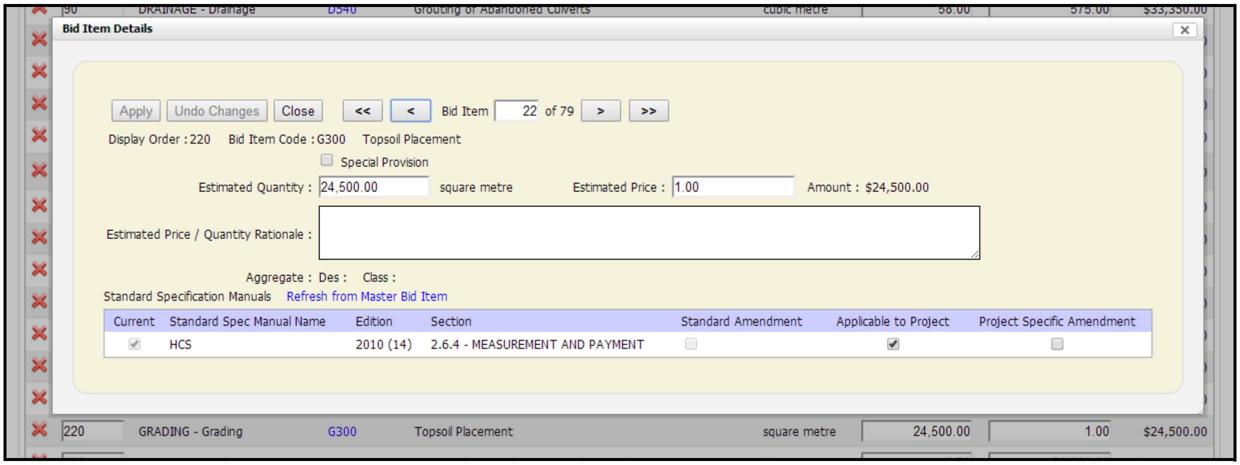
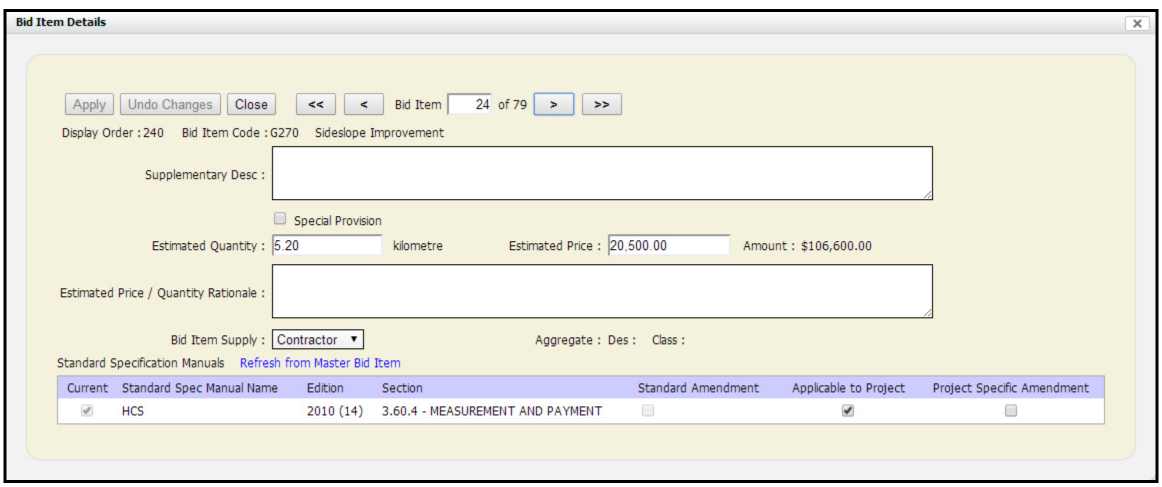


Figure 8.11 Maintain Bid Item Design screen - Bid Item Details window with Suppl Desc



Alert! The same Bid Item Code may be used multiple times in a Tender Bid Item so long as the description of each is different.

Table 8.6 Bid Item Details window - field definitions

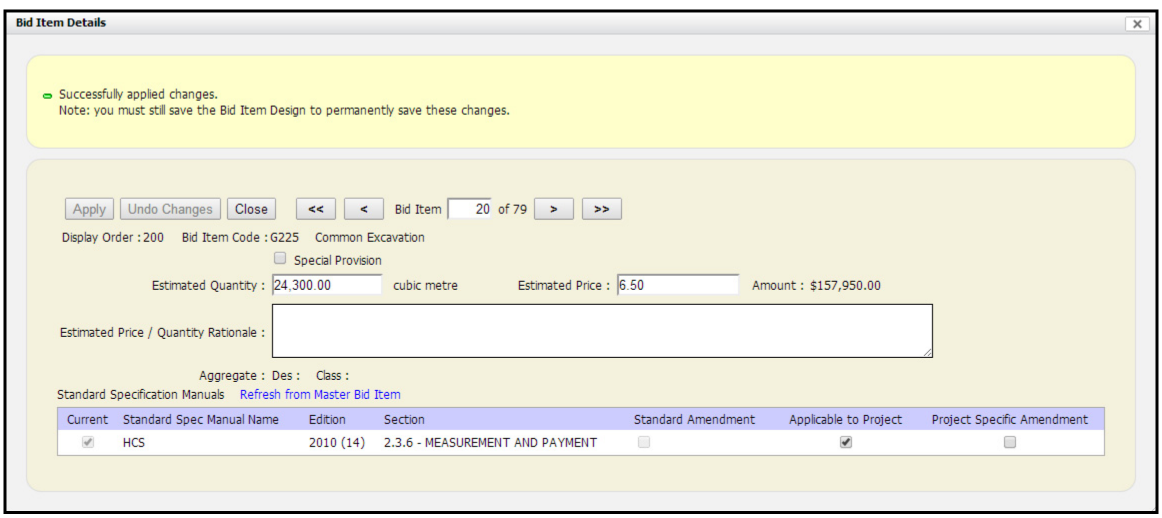
Field	Description
Apply (button)	This button saves the changes made in the window. This does NOT save the changes to the Maintain Bid Item Design screen.
Undo Changes (button)	This button takes the user back to the last time the Apply button was selected.
Close (button)	This button closes the window. The button goes inactive if any changes are made.
Bid Item (buttons)	Displays the Bid Item number relative to the list of Bid Items on the Bid Item Design screen. Buttons can be used to navigate to the first, previous, next, and last bid item in the list.
Display Order	Displays the Display Order value from the Bid Items tab.
Bid Item Code/Description	Displays the Id and description of the Bid Item.
Supplementary Description	A text field that may be used (when available) to edit the Bid Item's Description. Typically used on Miscellaneous Bid Items or when the same Bid Item code is used multiple times. The same Bid Item Code may be used multiple times in a Tender Bid Item so long as the description between each is different.
Special Provision	A checkbox indicating that the Bid Item has a Special Provision or not. A Check will add the text: '(Special Provisions)', to the description of the item in the UPS Section of the Tender Document.
Estimated Quantity/Unit of Measure	This is the estimated quantity per unit of measure. The data entry field that is the equivalent to the Estimated Quantity field on the Bid Item tab. The Quantity can be entered in either place.
Estimated Price	This is the estimated price per unit. The data entry field that is the equivalent to the Estimated Price field on the Bid Item tab. The Price estimate can be entered in either place.
Amount	Displays the calculation of Quantity x Price.
Estimate Price/Quantity Rationale	Allows for text entry to rationalize the Price and Quantity values entered.
Bid Item Supply	Depending on the Bid Item definition the value is 'display only' or must be selected. If Bid Item Supply was defined as Optional then a choice must be made.
Aggregate, Des, Class	Displays (if applicable) the Aggregate Designation and Class. The fields may be editable.
Standard Specification Manuals	A title for the manuals displayed below.

Table 8.6 Bid Item Details window - field definitions

Field	Description
Refresh from Master Bid Item	Link to update the Standard Specification Manuals associated with the Bid Item - assuming that the master Bid Item was updated since the Tender Bid Item was first created.
Current	Displays a check mark in the box if the manual is the most current version.
Standard Spec Manual Name	Displays the name of the Standard Specification Manual associated with the Bid Item.
Edition	Displays the Release year and Edition number of the manual.
Section	Displays the Section (payment) of the manual associated with the Bid Item.
Standard Amendment	Displays a check mark in the box if the section has been amended.
Applicable to Project	Displays a check mark in the box if the amendment to the section is applicable to the Bid Item.
Project Specific Amendment	Displays a check mark in the box if an amendment is specific to the Bid Item Design.

Alert! After Applying changes made on the Bid Item Details window, the user still needs to Save the Maintain Bid Item Design screen to save the detail changes.

Figure 8.12 Maintain Bid Item Design screen - Bid Item Detail Saved



Special Provisions

When the Special Provision box is checked, it forces text to be added to the Tender Document in the UPS section (2.2). The text is added to the Description of the Bid Item that was checked. This provides a visual indicator in the UPS section of the Tender Document that, there are Special Provisions regarding the Bid Item later in the document.

Figure 8.13 Maintain Bid Item Design screen - Special Provision checked

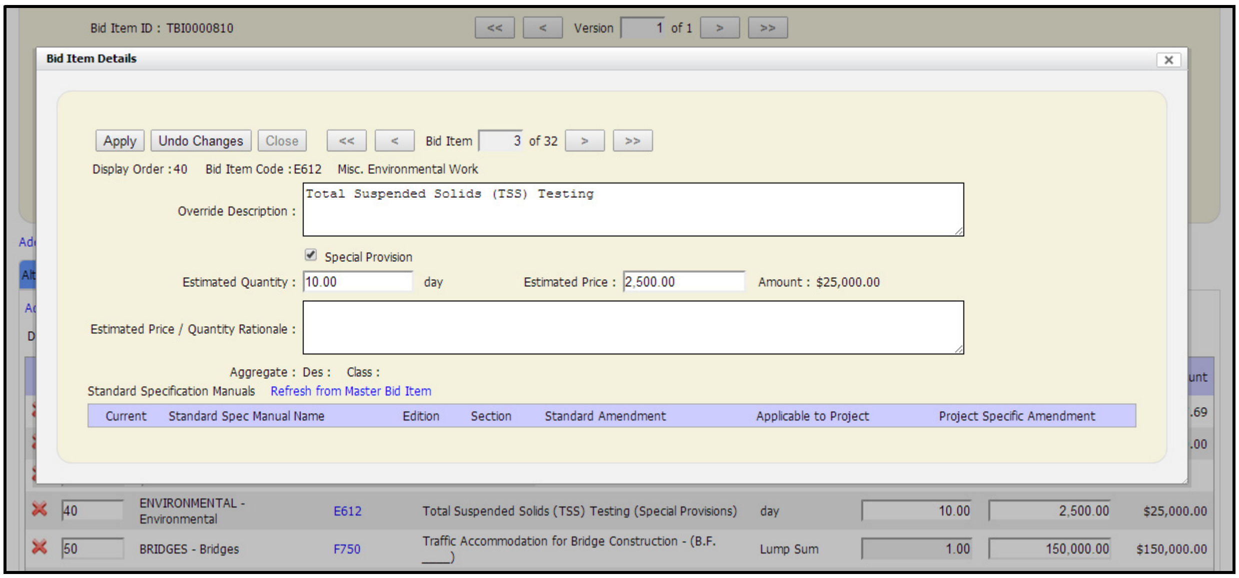


Figure 8.14 Maintain Bid Item Design screen - Special Provision Description example

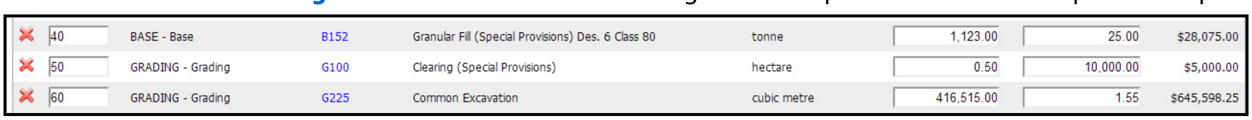
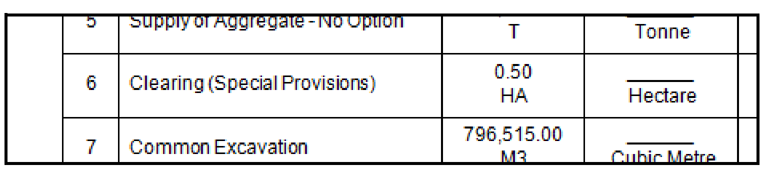


Figure 8.15 Tender Document_UPS Section Special Provisions

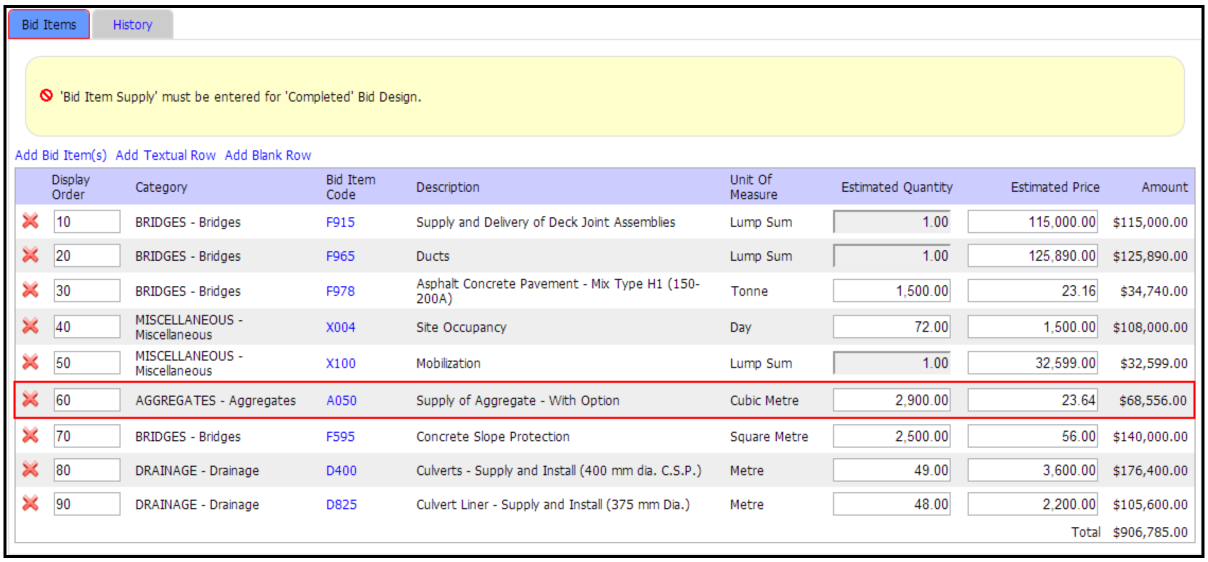


	5	Supply of Aggregate - No Option	T	Tonne	
	6	Clearing (Special Provisions)	0.50 HA	Hectare	
	7	Common Excavation	796,515.00 M3	Cubic Metre	

Bid Item Supply

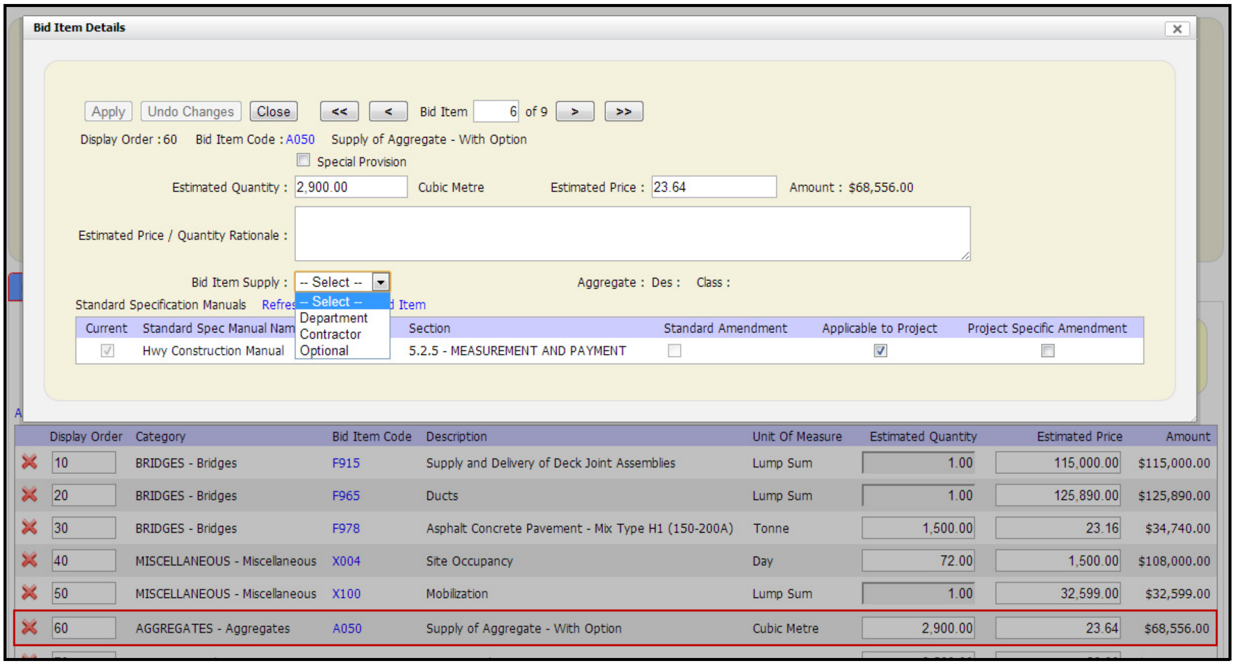
When Professional Services - Tender Services creates Bid Items there is a field (Bid Item Supply) that relates to Supply. Supply is used to indicate who will supply the bid item: the Department (AT), the Contractor, or Optional (either/both). If the master Bid Item has the Bid Item Supply field set to 'Optional', then a choice needs to be specified in the Bid Item Design. The Bid Item Details window provides access to the Supply field. It is accessed by clicking the Bid Item Code.

Figure 8.16 Maintain Bid Item Design screen - Bid Item Supply



Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	BRIDGES - Bridges	F915	Supply and Delivery of Deck Joint Assemblies	Lump Sum	1.00	115,000.00	$115,000.00
20	BRIDGES - Bridges	F965	Ducts	Lump Sum	1.00	125,890.00	$125,890.00
30	BRIDGES - Bridges	F978	Asphalt Concrete Pavement - Mix Type H1 (150-200A)	Tonne	1,500.00	23.16	$34,740.00
40	MISCELLANEOUS - Miscellaneous	X004	Site Occupancy	Day	72.00	1,500.00	$108,000.00
50	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	32,599.00	$32,599.00
60	AGGREGATES - Aggregates	A050	Supply of Aggregate - With Option	Cubic Metre	2,900.00	23.64	$68,556.00
70	BRIDGES - Bridges	F595	Concrete Slope Protection	Square Metre	2,500.00	56.00	$140,000.00
80	DRAINAGE - Drainage	D400	Culverts - Supply and Install (400 mm dia. C.S.P.)	Metre	49.00	3,600.00	$176,400.00
90	DRAINAGE - Drainage	D825	Culvert Liner - Supply and Install (375 mm Dia.)	Metre	48.00	2,200.00	$105,600.00
						Total	$906,785.00

Figure 8.17 Maintain Bid Item Design screen - Bid Item Supply Choices



History Tab

The History tab on the Maintain Bid Item Design screen is used to list changes that have taken place since the Tender Advertised 'Actual Date' was entered. History will only be captured on Tender Bid Item versions that have a tender addendum defined.

Hint: Every Tender Bid Item version will include a full history of changes made.

Figure 8.18 Maintain Bid Item Design screen - History tab

Figure 8.19 Maintain Bid Item Design screen - History tab After Addendum

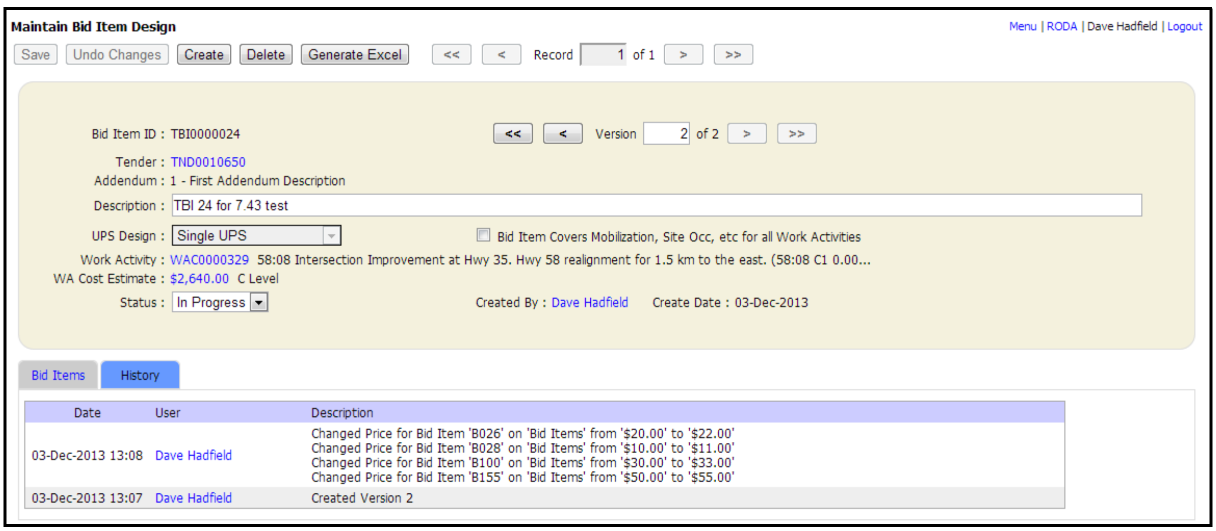


Table 8.7 Maintain Bid Item screen - Bid Item tab field definitions

Field	Description
Date	This displays the date and time the changes were made.
User	This displays the user who made the changes.
Description	A textual description of the changes made to the Bid Item Design.

Chapter 9: Create Tender Bid Item

This chapter covers creating Tender Bid Items on a Tender. This process should be performed by the consultant submitting the Tender Package.

Topics in Chapter:

1. Create Tender Bid Item
2. Create Tender Bid Item with Work Activities
3. Create Tender Bid Item with Alternatives
4. Complete Tender Bid Items
5. Edit Tender Bid Item Details
6. Delete Tender Bid Item

Create Tender Bid Item

A Tender Bid Item is a list of Bid Items. The list is used to generate a Unit Price Schedule (UPS) Section (a Tender may have multiple UPS sections). The UPS tab (on the Maintain Tender screen) is used to pick and choose the Tender Bid Items when building each UPS Section. Therefore, when building Tender Bid Items you want to keep in mind the next step of generating the UPS Sections (i.e. if ultimately there will be two alternative UPS sections, or the intent is to have multiple UPS Sections: you need to structure the Tender Bid Items accordingly). There are several options available when creating Tender Bid Items. One Tender Bid Item could be created to cover all of the work, if there was only one construction work activity. There is a rule when creating Tender Bid Items that are specific to a Work Activity, and that is: each Work Activity must have one and only one Tender Bid Item. The link to create Tender Bid Items is available on both the Construction Projects tab and the Bid Item tab.

See: *See* ***"Create Tender Bid Item with Alternatives" on page 9-13 for additional information.***

Figure 9.1 Maintain Tender screen – Bid Item tab

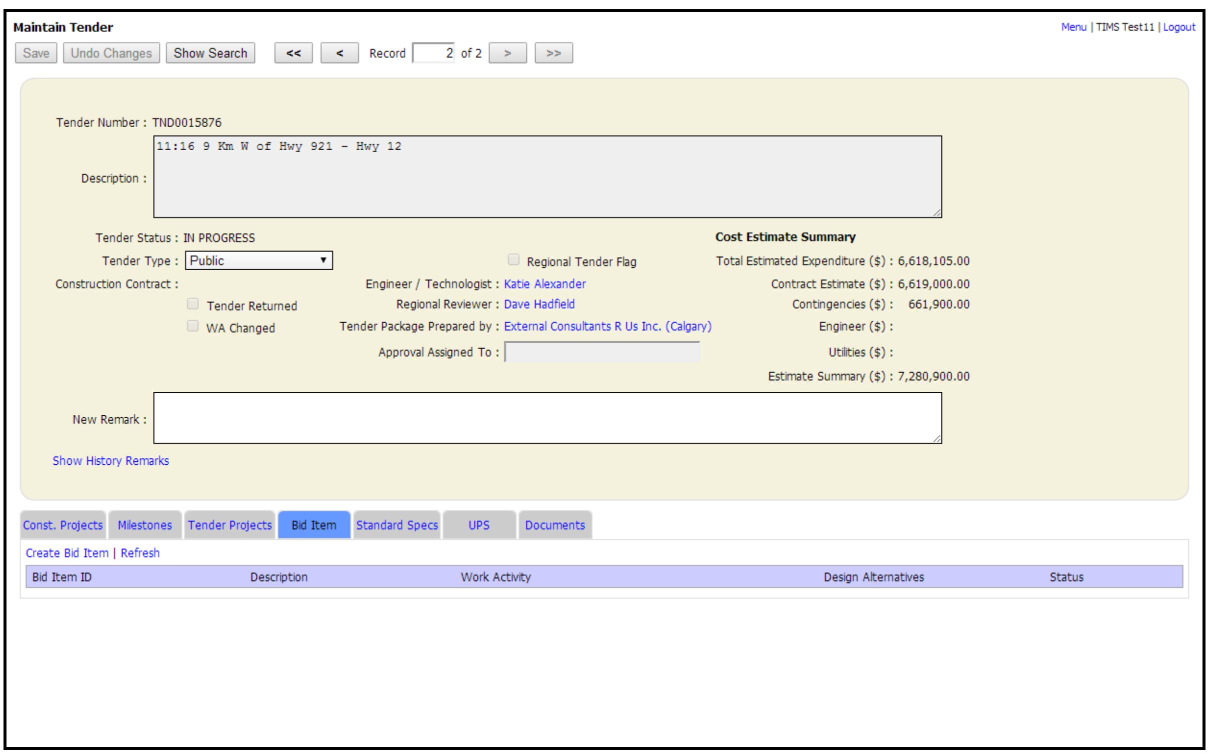
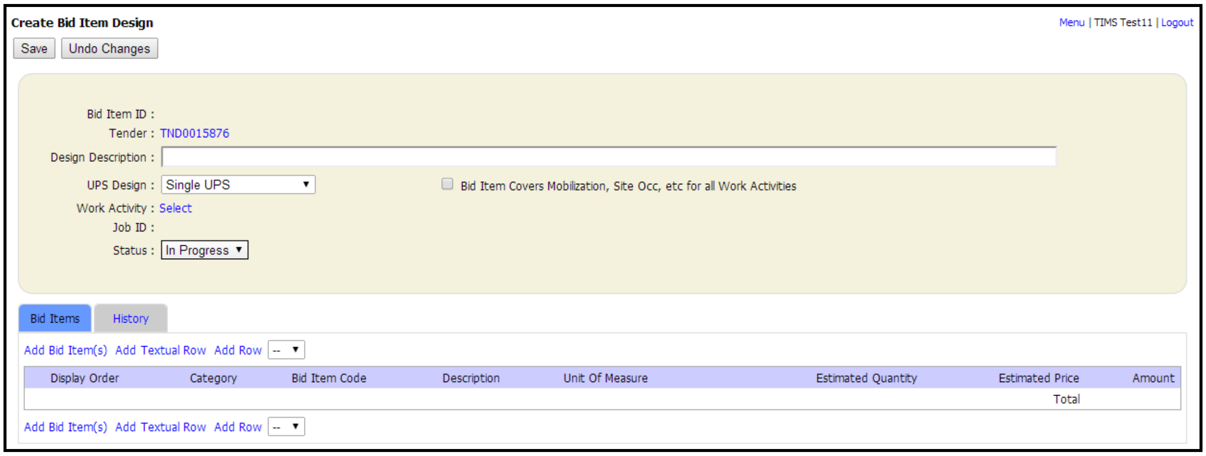
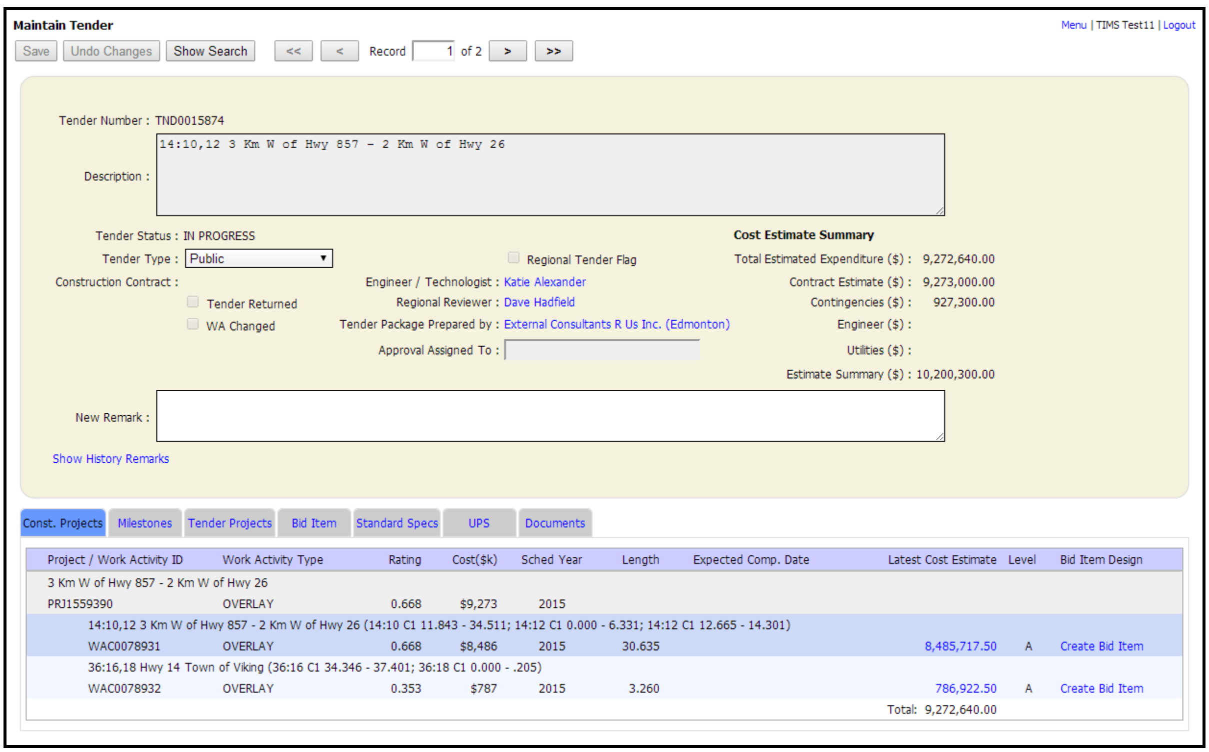


Figure 9.2 Create Bid Item Design screen - from Bid Item tab blank



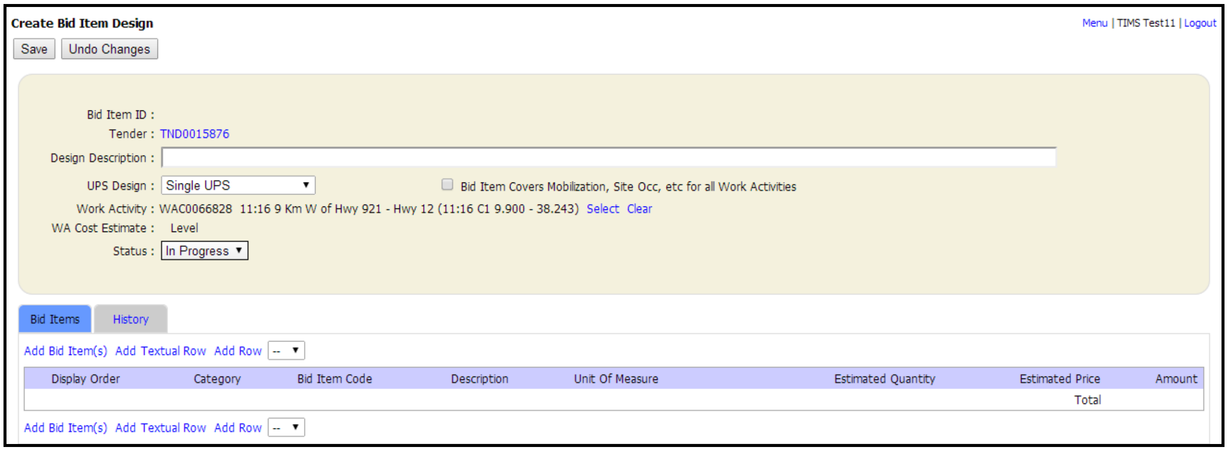
Hint: The Create Bid Item link is also available, for Work Activities, on the Construction Projects tab.

Figure 9.3 Maintain Tender screen - Construction Projects tab



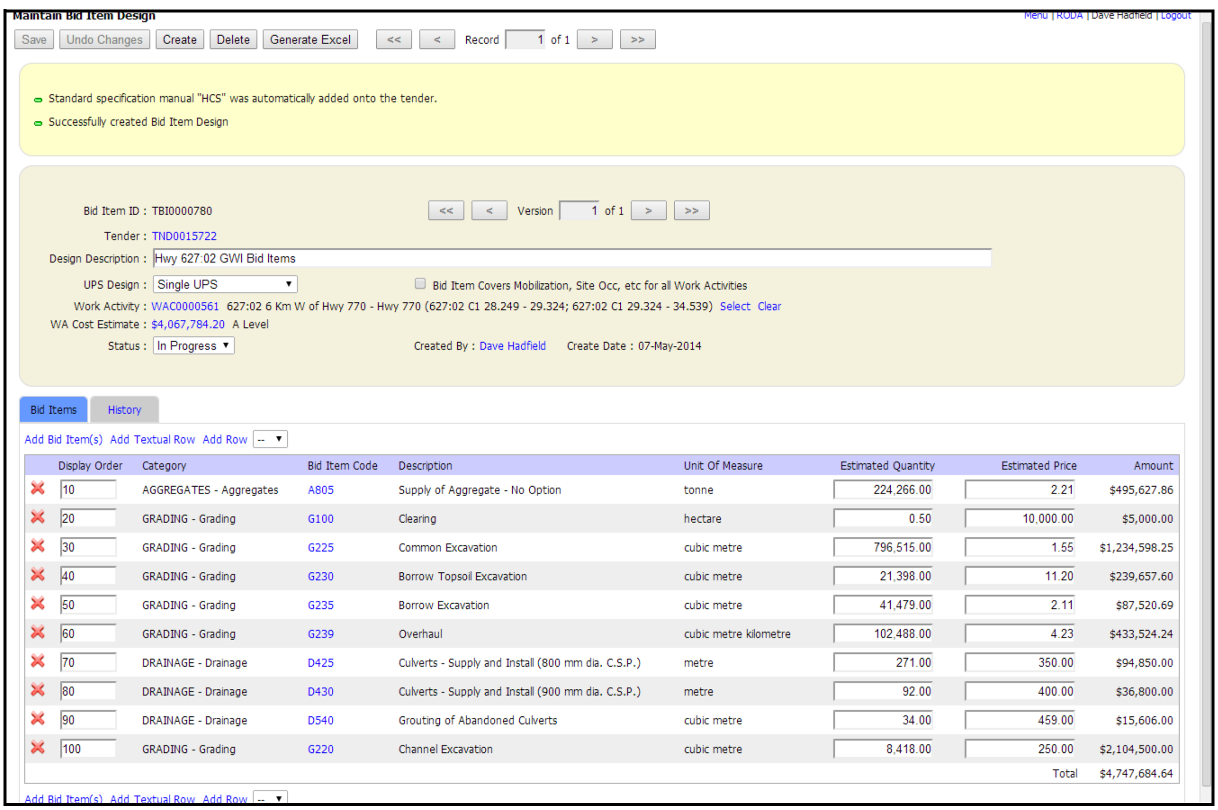
Alert! One Tender Bid Item must be created for each Construction Work Activity (WAC).

Figure 9.4 Create Bid Item Design screen - from Construction Projects tab



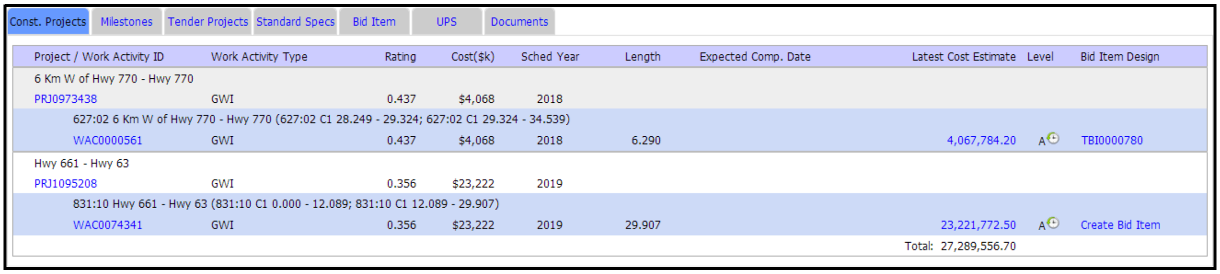
Alert! Do Not select 'Bid Item Covers Mobilization, Site Occ. etc'. Split the Mobilization and Site Occupancy amounts (quantity or lump sum) across the work activities in the Tender.

Figure 9.5 Maintain Bid Item screen - Saved



Tender Bid Items that identify a Work Activity will also appear on the Construction Projects tab. Figure 9.6 below shows the Tender Bid Item ID for the Work Activity.

Figure 9.6 Construction Projects tab - Tender Bid Item Saved



Const. Projects | Milestones | Tender Projects | Standard Specs | Bid Item | UPS | Documents

Project / Work Activity ID	Work Activity Type	Rating	Cost($k)	Sched Year	Length	Expected Comp. Date	Latest Cost Estimate	Level	Bid Item Design
6 Km W of Hwy 770 - Hwy 770									
PRJ0973438	GWI	0.437	$4,068	2018					
627:02 6 Km W of Hwy 770 - Hwy 770 (627:02 C1 28.249 - 29.324; 627:02 C1 29.324 - 34.539)									
WAC0000561	GWI	0.437	$4,068	2018	6.290		4,067,784.20	A	TBI0000780
Hwy 661 - Hwy 63									
PRJ1095208	GWI	0.356	$23,222	2019					
831:10 Hwy 661 - Hwy 63 (831:10 C1 0.000 - 12.089; 831:10 C1 12.089 - 29.907)									
WAC0074341	GWI	0.356	$23,222	2019	29.907		23,221,772.50	A	Create Bid Item
							Total: 27,289,556.70		

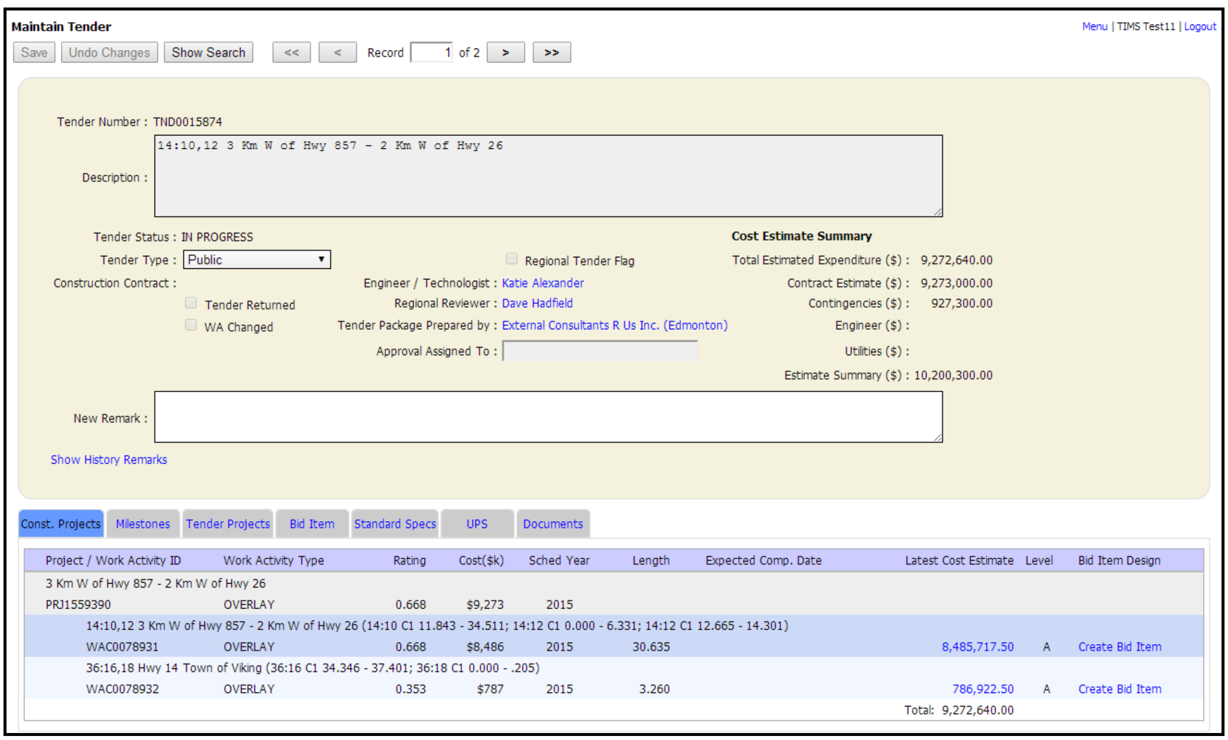
Create Tender Bid Item with Work Activities

Creating Tender Bid Items for Work Activities is a requirement. However, this is an easy process and it saves time later as the Bid Items are copied into the new construction contract into the Bid Items tab. There are two methods of creating Tender Bid Items for Work Activities. Both require selecting the Create Bid Item link. One is from the Construction Projects tab and the other is from the Maintain Bid Item Design screen.

In Figure 9.7 below you can see a ‘Create Bid Item’ link for each of the Construction Work Activities. Using these links is the recommended method for creating Bid Item because:

1. There must be one Tender Bid Item for each Work Activity.
2. Work Activity information is automatically copied onto the Maintain Bid Item Design screen.

Figure 9.7 Maintain Tender screen - Create Bid Item - Construction Projects tab



In Figure 9.8 below you can see a 'Create Bid Item' link. Using this link results in a new Tender Bid Item but all fields are blank and without checking the Construction Projects tab, you may not know if all Work Activities have a Bid Item.

Figure 9.8 Maintain Tender screen – Create Bid Item - Bid Item tab

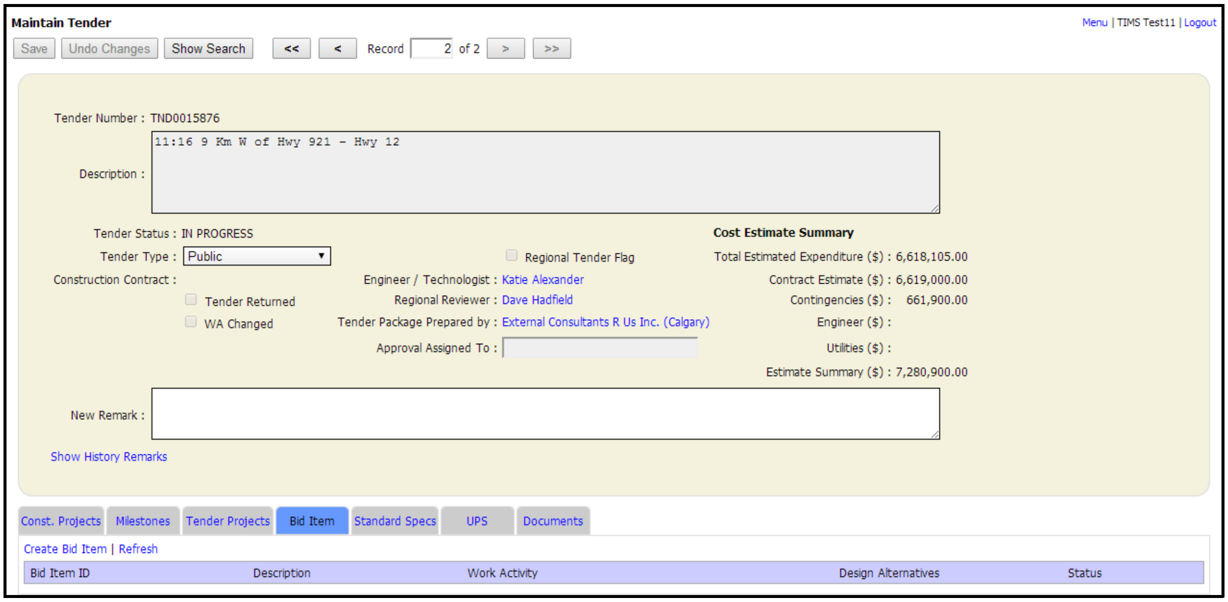
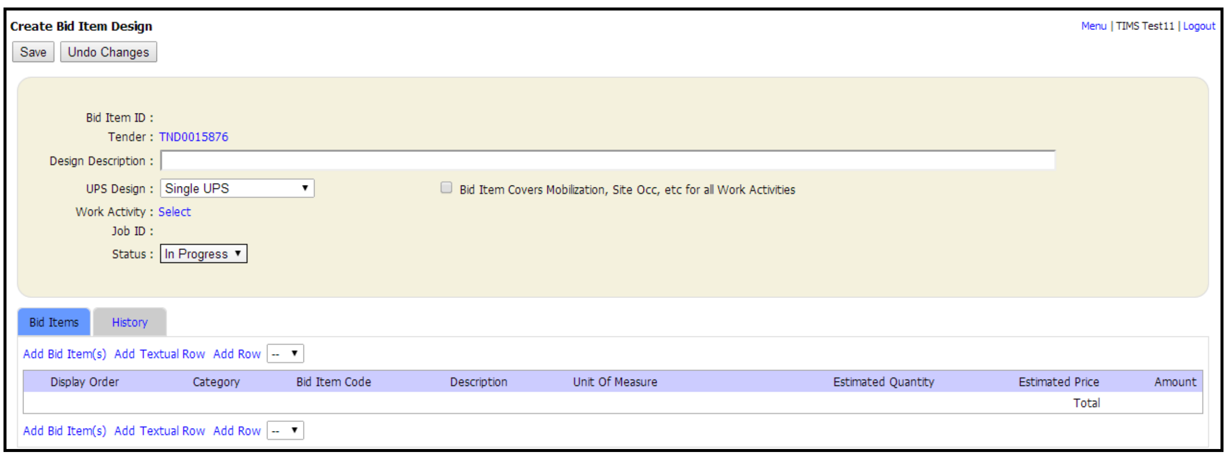
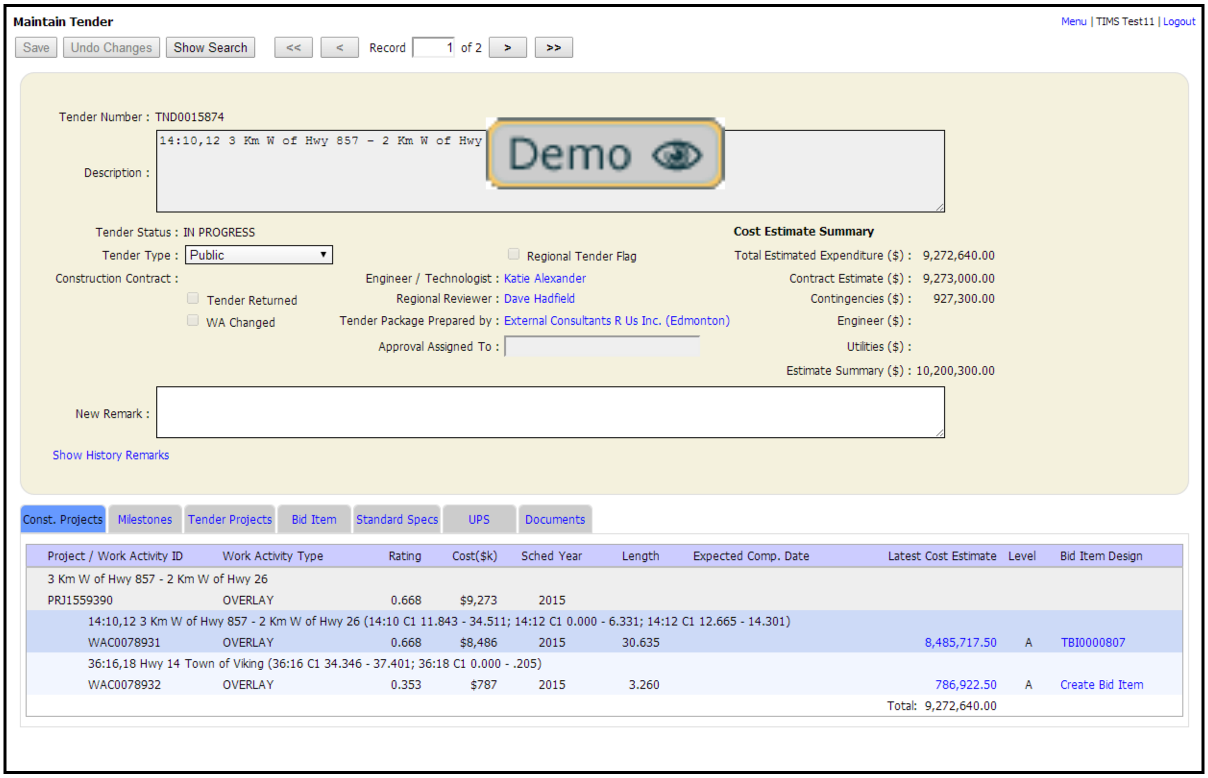


Figure 9.9 Create Bid Item Design screen - from Bid Item tab blank



Demo 9.1 Create a Tender Bid Item

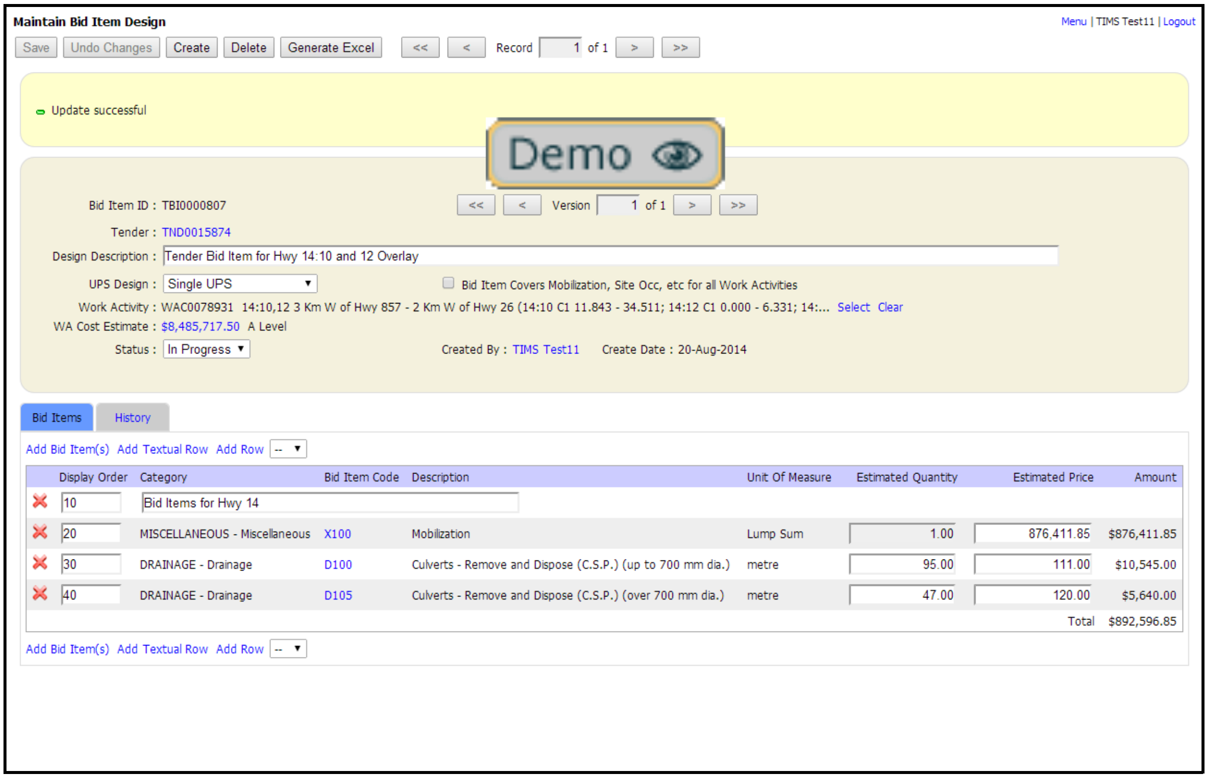


How To

1. From the *Maintain Tender* screen in the *Construction Projects* tab select the **Create Bid Item** link for a Work Activity.
2. From the *Create Bid Item Design* screen type a **Description**.
3. From the **UPS Design** drop down select the required design option.
4. Select the **Save** button.

The following demonstration assumes you know how to search for existing Bid Items.

Demo 9.2 Add Bid Items to a Tender Bid Item



How To

1. From the *Maintain Tender* screen in the *Bid Item or Const Projects* tab, select the **Bid Item ID** link.
2. From the *Maintain Bid Item Design* screen select either the **Add Bid Item(s)** link or the **Add Row** link.
3. Select/type the required **Bid Item Code**.
4. Enter the **Estimate Quantity** and **Estimated Price**.
5. Select the **Save** button.
6. Repeat for each Bid Item to be added.

Hint: Assuming that you are working off the Tender Package, you can also enter the Estimated Quantities and Prices for each Bid Item.

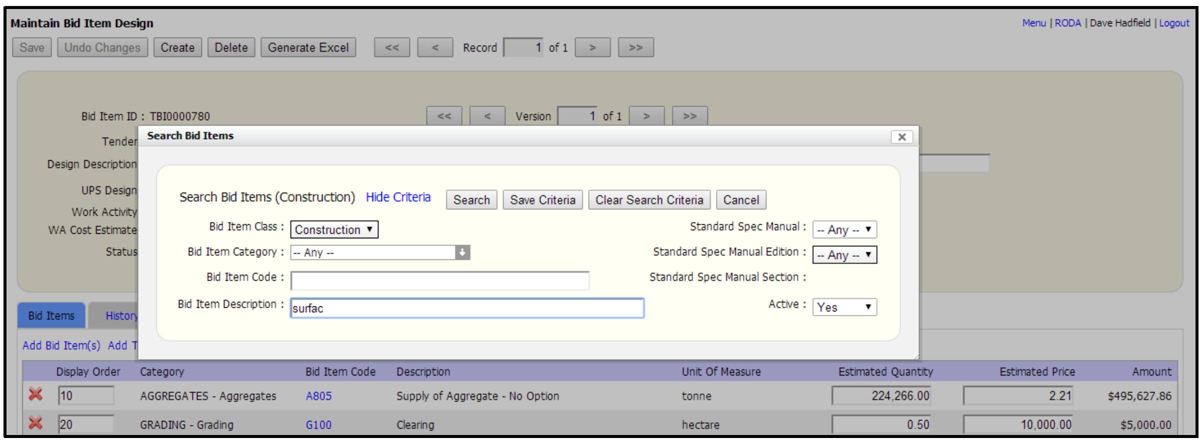
Search for Construction Bid Items

If you are not familiar with the Bid Item codes and complete descriptions, you can use the Add Bid Item(s) link on the Maintain Bid Item Design screen to search for bid items using various criteria.

Hint:	Use the Search Bid Item window to generate a list of Active Bid Items: with Codes, Descriptions and Unit of Measure.

When the Add Bid Item(s) link is clicked, the first thing to appear is the Search Bid Items screen. The screen defaults to Construction Bid Items. Enter the criteria required and search for the Bid Item(s) needed.

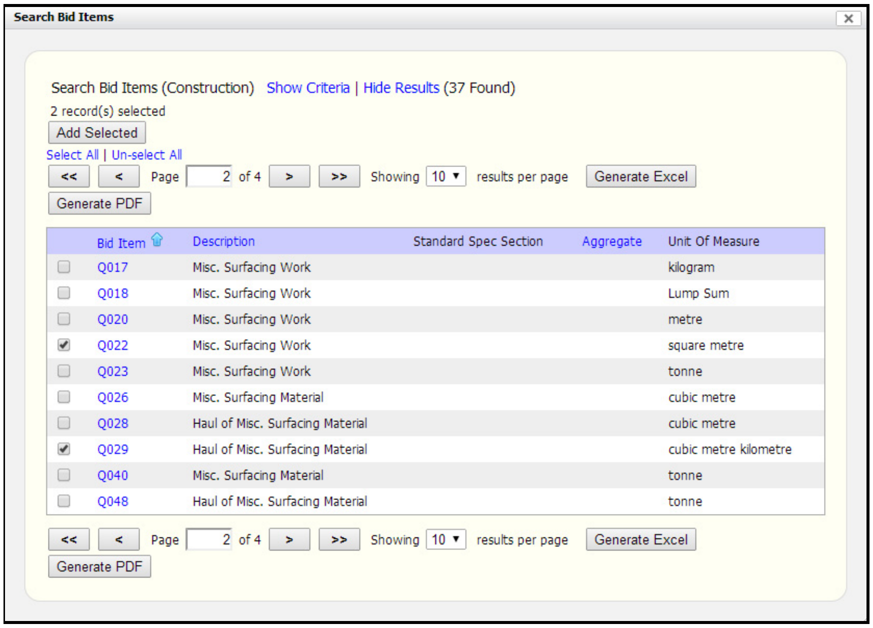
Figure 9.10 Maintain Bid Item Design screen - Add Bid Item Search



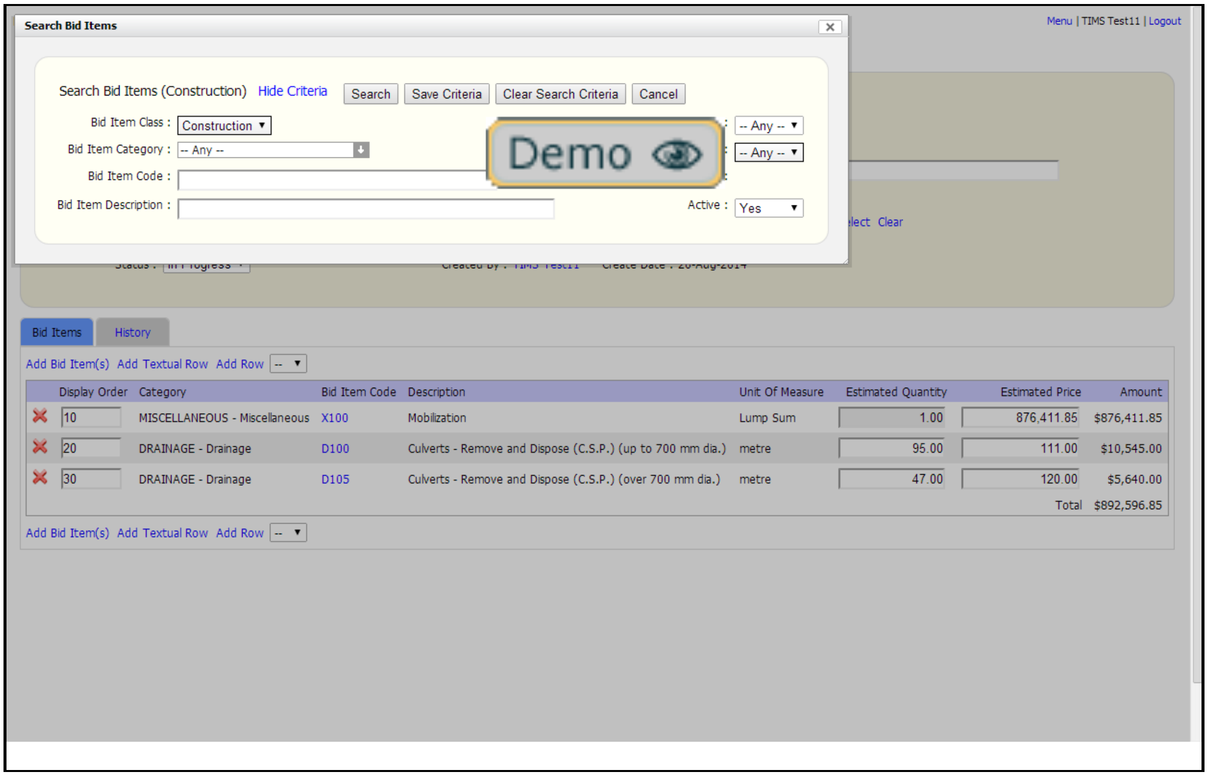
Hint:	You can select more than one Bid Item from the search results.

Alert!	When checking a list of Bid Items, the order that you click to select, is the order the Bid Items will be listed on the screen. The Display Order is set as you click on Bid Items.

Figure 9.11 Maintain Bid Item Design screen - Add Bid Item Selection



Demo 9.3 Search for Bid Items



How To

1. From the *Maintain Bid Item Design* screen, select the **Add Bid Item(s)** link.
2. From the *Search Bid Item* window select or enter criteria as necessary.
3. Select the **Search** button.
4. Check the required Bid Item(s).
5. Select the **Add Selected** button.
6. From the *Maintain Bid Item Design* screen select the **Save** button.

Create Tender Bid Item with Alternatives

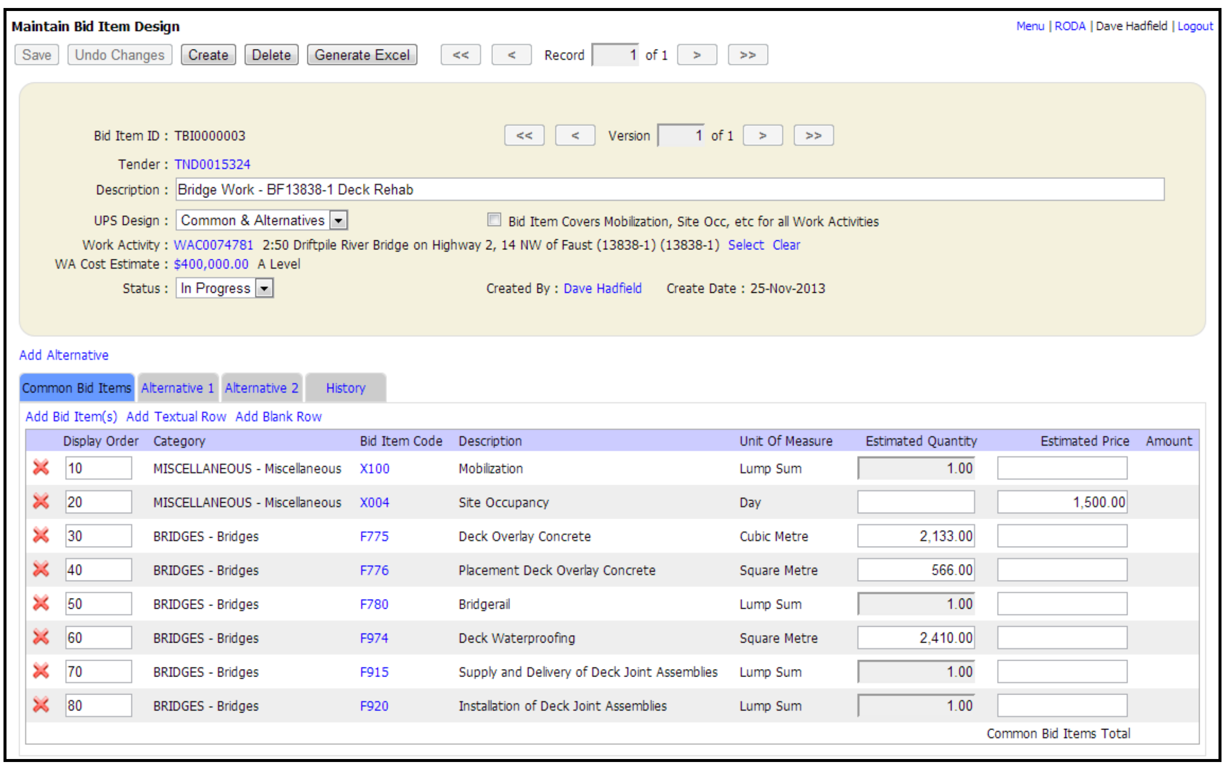
Tender Bid Items may be created in any of three styles: Single UPS, Alternatives, or Common & Alternatives. This allows the required Unit Price Schedule to contain multiple sections.

- There can be one UPS Section covering all of the Bid Items for the Tender (Single UPS).
- There can be multiple UPS Sections, each listing bid items from one or more alternatives. With each section listing the Bid Items acceptable for one method versus the other.
- There can be one UPS Section containing all of the Common Bid Items and at least two Alternatives. With each alternative listing Bid Items suitable for one method and the other.

In this portion of the Create Tender Bid Item chapter we look at creating the Tender Bid Item with alternatives.

Alert!	Tender Bid Items not using the Single UPS Design, must specify a Work Activity.

Figure 9.12 Maintain Bid Item Design screen - Common tab



In the figures that follow is an example of how alternatives may be used. In the scenario there are two bridges requiring demolition and construction. Alternative one considers staging the construction while alternative two looks at using a detour. Both alternatives require Mobilization and Site Occupancy although the rates for mobilization would be different for Alternative One (1) vs. Two (2).

In this example two Tender Bid Items were created; one for the northbound bridge with alternatives one and two, and the second for the southbound bridge with alternatives one and two.

Figure 9.13 Maintain Tender screen – Bid Item tab Alternatives

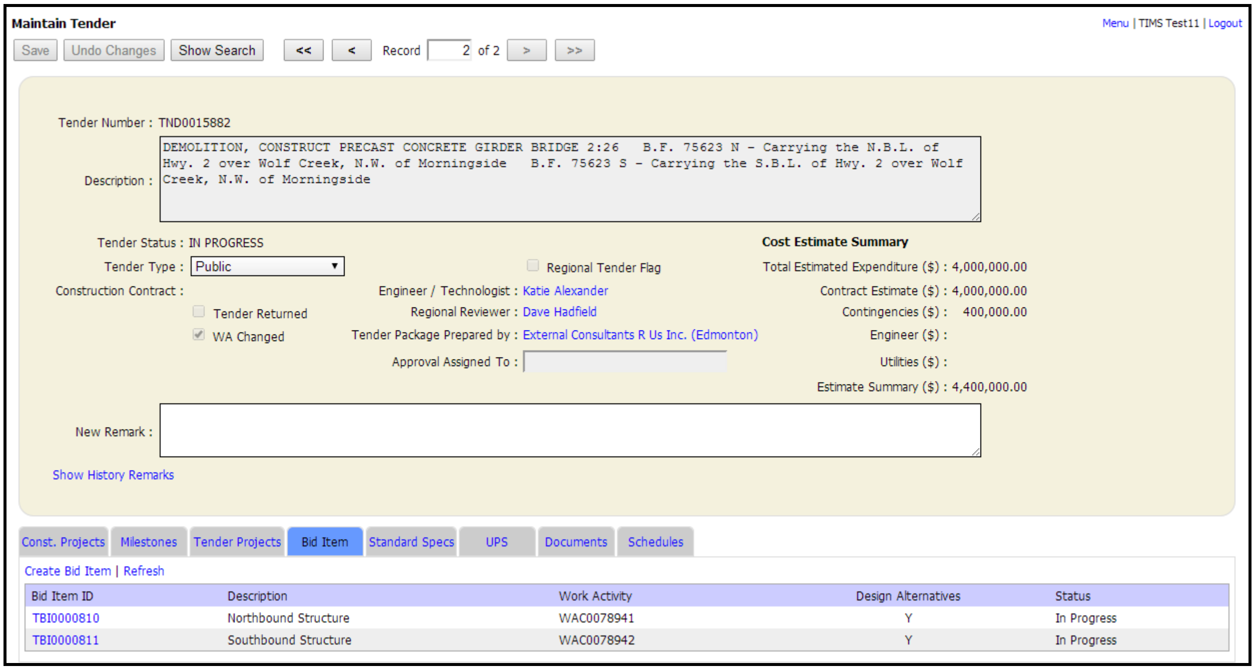


Figure 9.14 below shows the Northbound Tender Bid Item and how the Mobilization, Site Occupancy and other Bid Items were defined for staged Alternative. A text row was also added to mark where the Bid Items for the Northbound bridge began.

Figure 9.14 Maintain Bid Item Design screen - NB Alternative 1

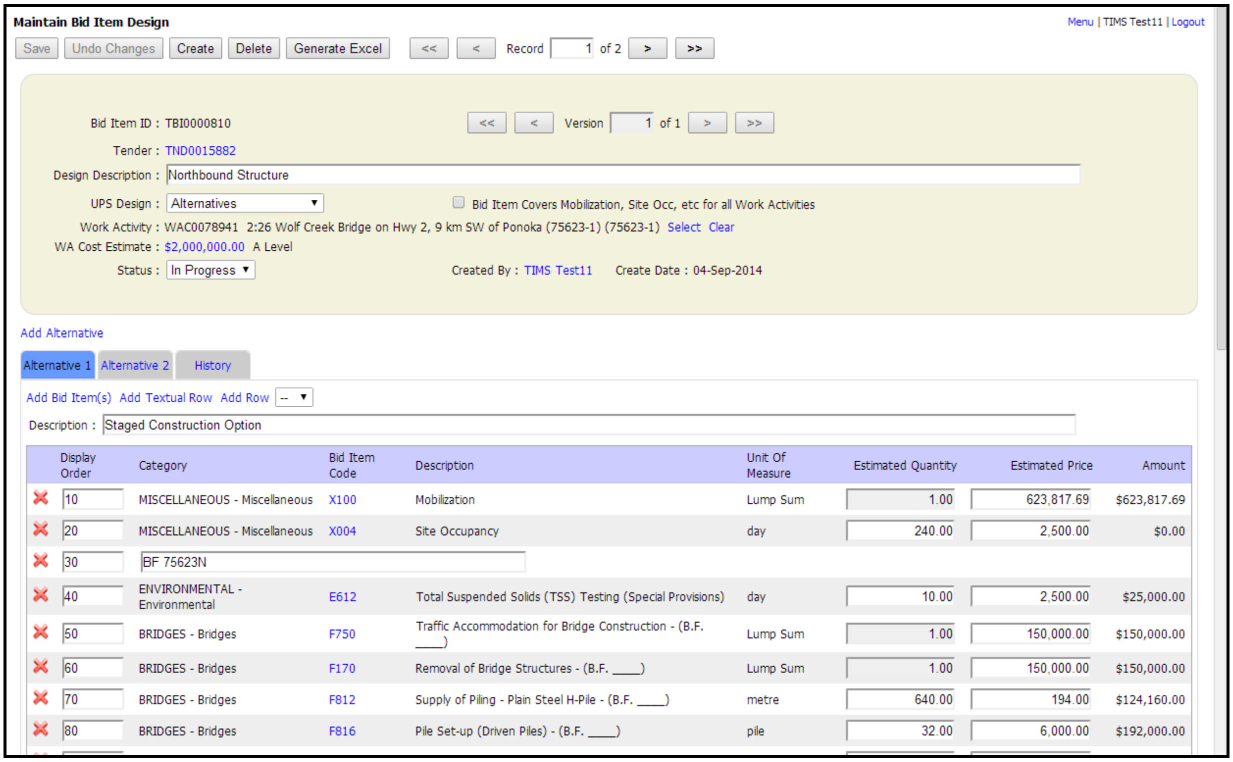
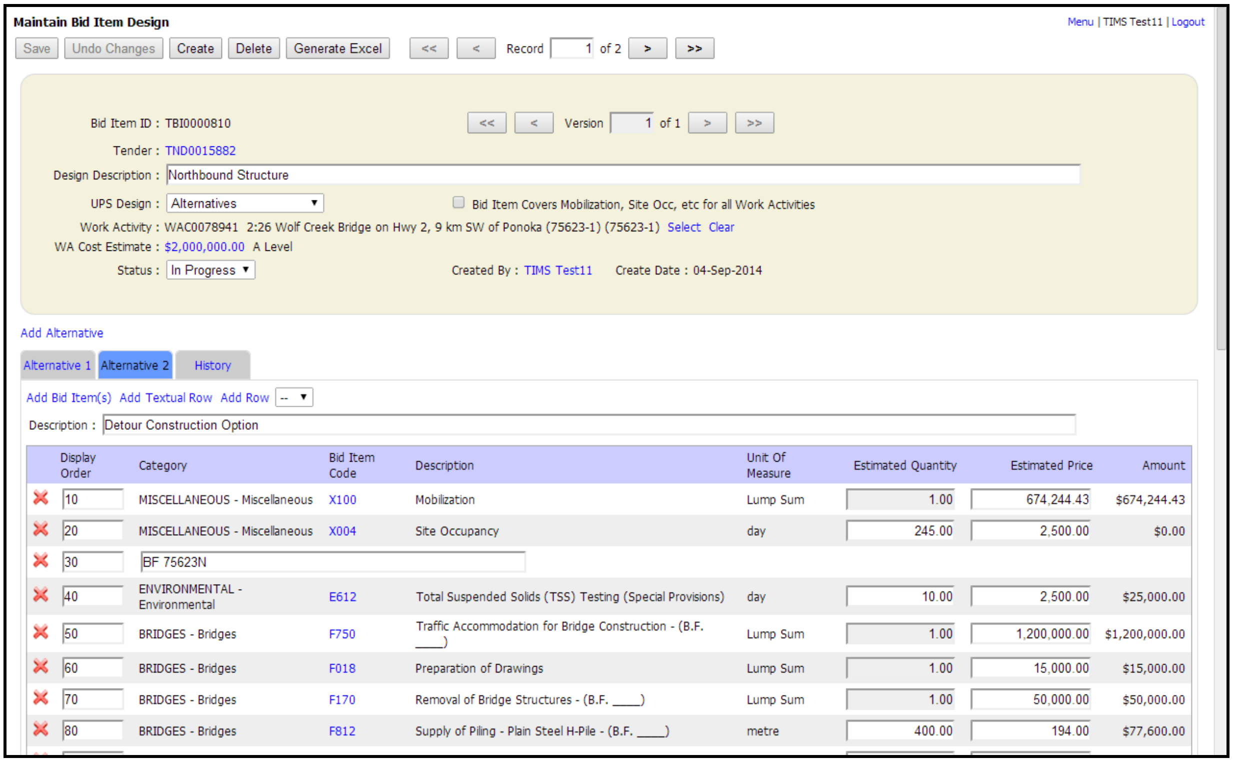


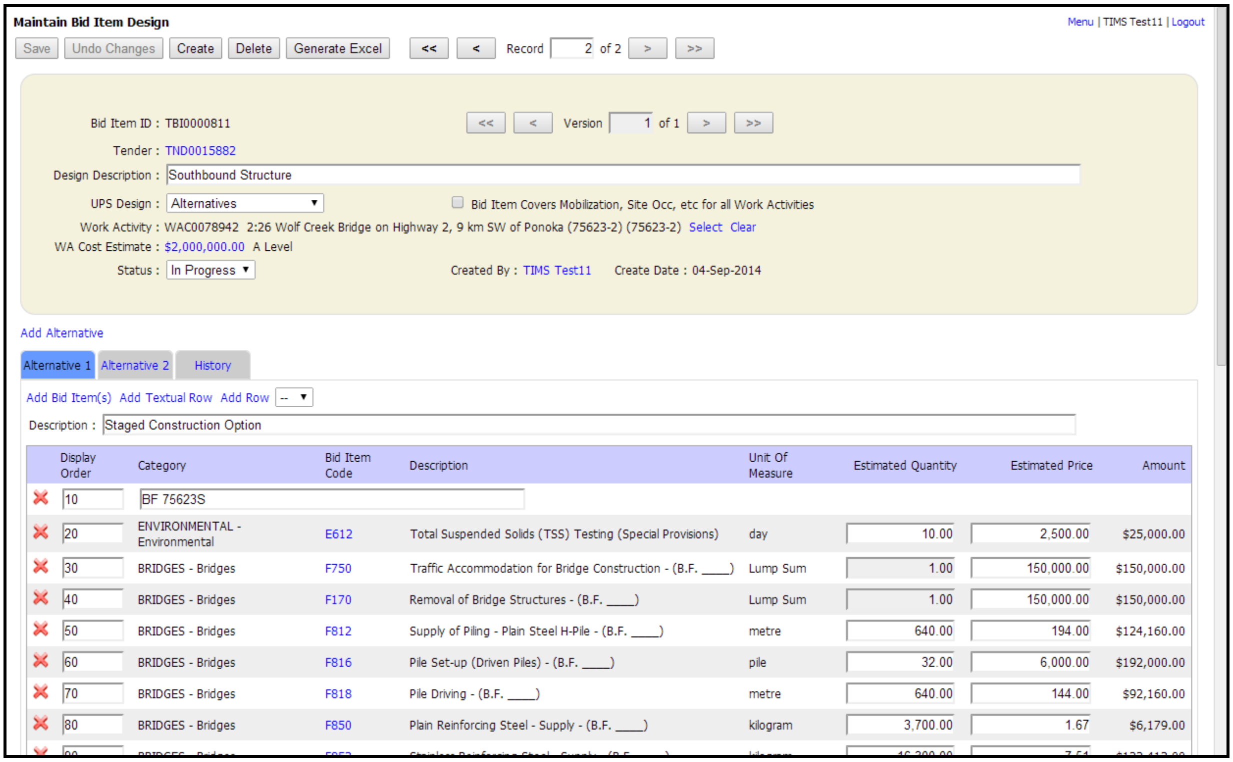
Figure 9.15 below shows the Northbound Tender Bid Item and how the Mobilization, Site Occupancy and other Bid Items were defined for detour Alternative. A text row was also added to mark where the Bid Items for the Northbound bridge began.

Figure 9.15 Maintain Bid Item Design screen - NB Alternative 2



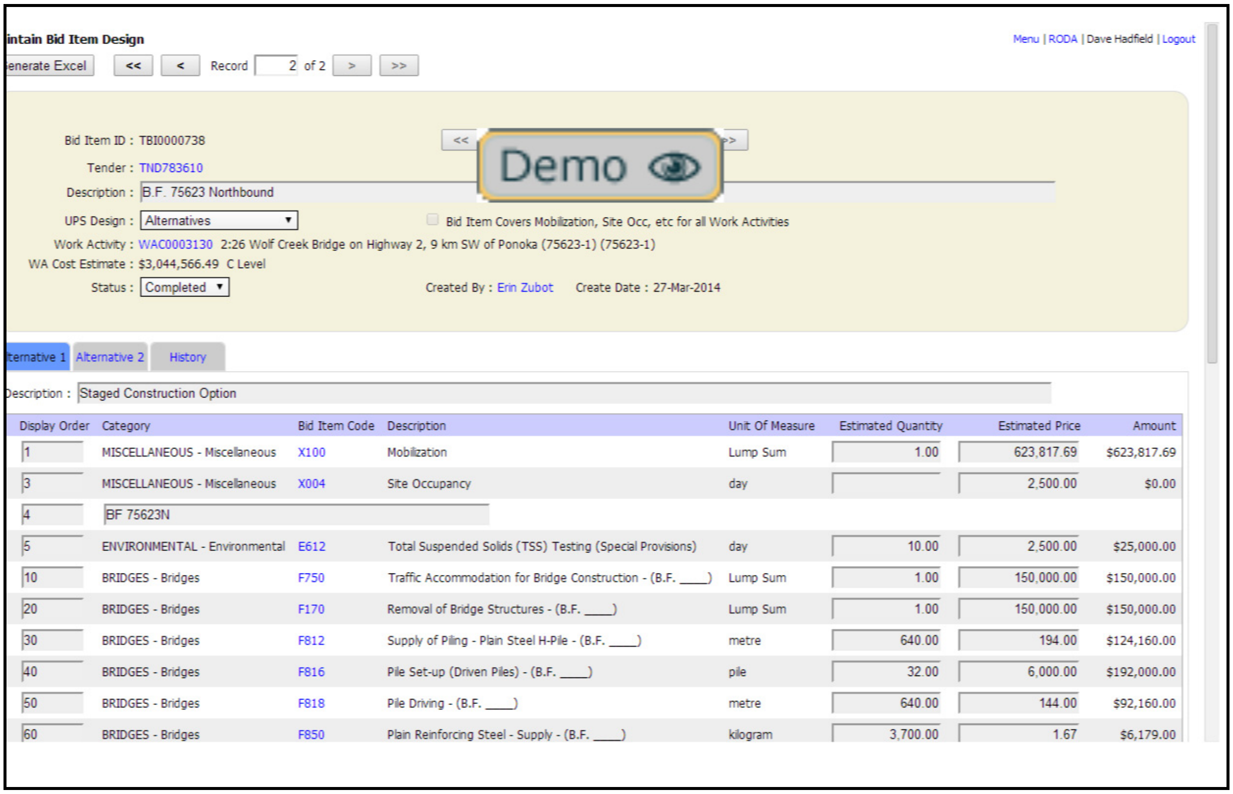
In Figure 9.16 below the Southbound Tender Bid Item is displayed. As Mobilization and Site Occupancy were defined in the Northbound Tender Bid Item alternatives; the southbound Tender Bid Item only needs to list the Bid Items required for each Alternative.

Figure 9.16 Maintain Bid Item Design screen - SB Alternative 1



See: *See* ***"Create UPS Section from Alternative Tender Bid Items" on page 13-19 for additional information.***

Demo 9.4 Create Alternative Tender Bid Item



How To

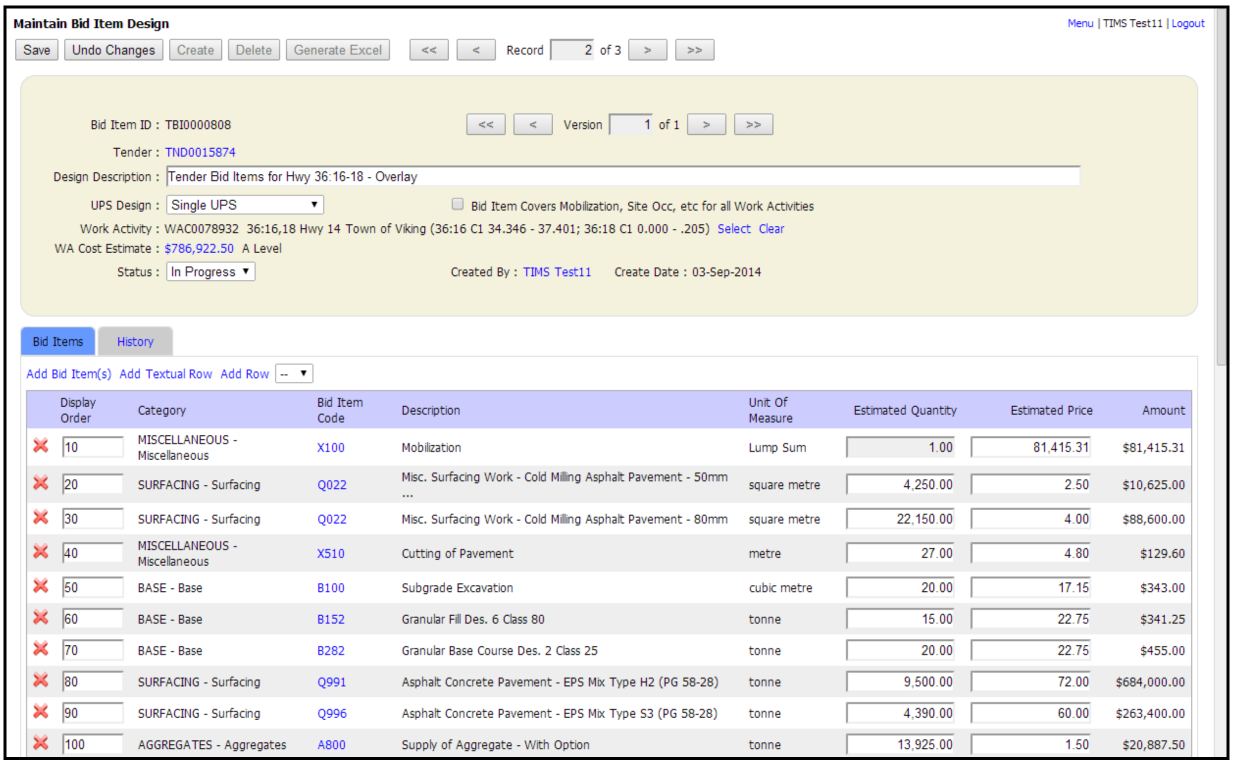
1. From the *Maintain Tender* screen in the *Construction Projects* tab select the **Create Bid Item** link.
2. From the *Maintain Bid Item Design* screen in the *UPS Design* drop down select the **Alternatives** option.
3. From the *Alternative 1* tab enter a **Description** for the first option.
4. From the *Alternative 2* tab enter a **Description** for the second option.
5. Select the **Save** button.
6. From the *Alternative 1* tab select the **Add Row** link.
7. Enter the required **Bid Item Code**.
8. Enter the **Estimated Quantity** and **Estimated Price** as necessary.
9. Select the **Save** button.
10. Repeat for each Bid Item to be added.
11. Repeat Steps 6 to 10 for the Alternative 2 tab.

Complete Tender Bid Items

When the Status of Tender Bid Items based on Single UPS design are set to Completed, the 'C' Estimates are automatically generated. However, Tender Bid Items that were created with Alternatives do not automatically generate 'C' Level Estimates. Alternatives by definition provide choices and each alternative provides the ability to generate a 'C' Estimate. However, the selection needs to be made manually.

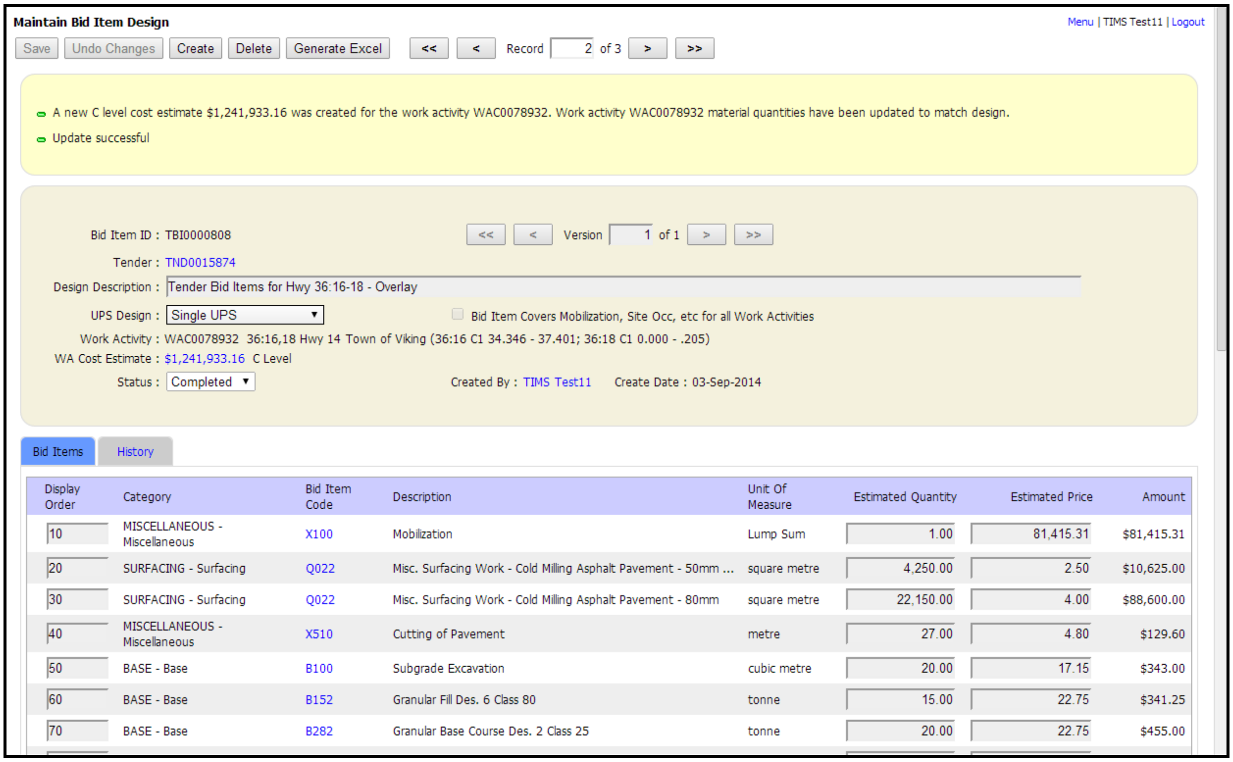
The ability to change the 'C' Level Estimate between one alternative and another rests with the External Data Entry security role. The ability to change is available even after the Tender Opening has taken place but only for the AT Project Administrator.

Figure 9.17 Maintain Bid Item Design screen - In Progress Single UPS



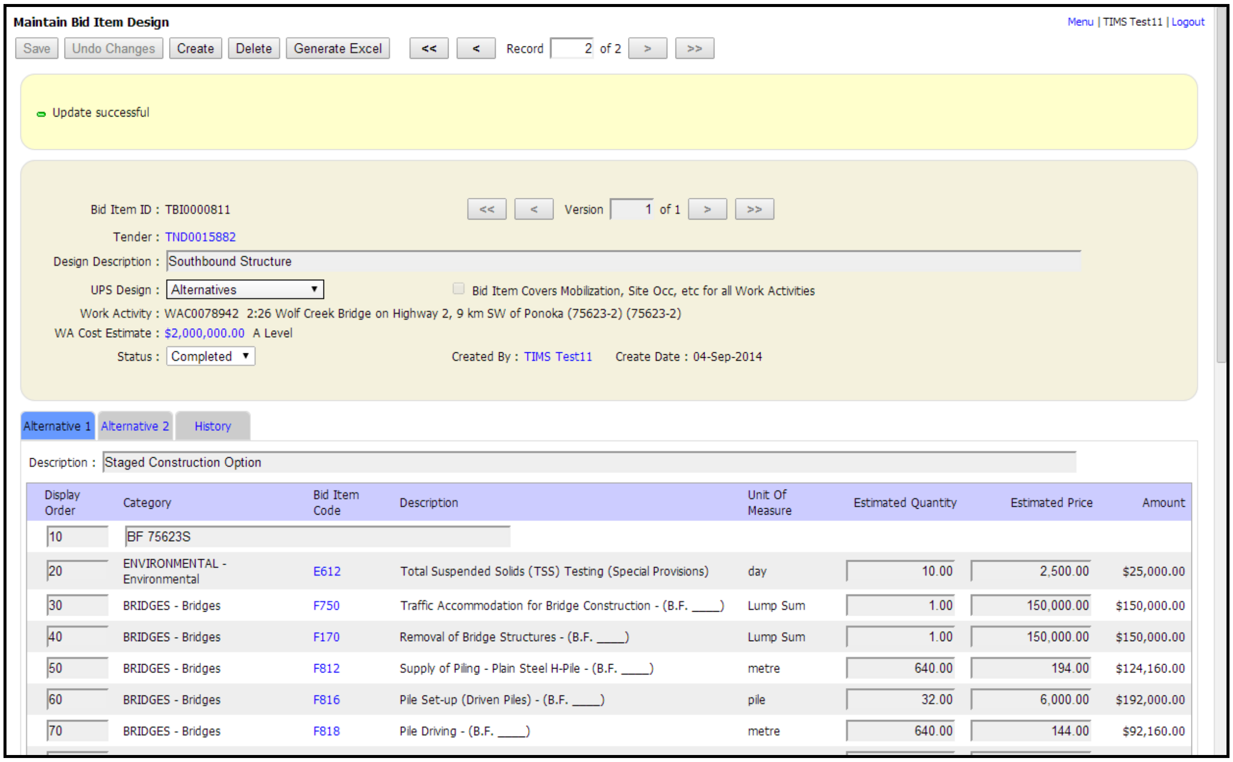
When a Tender Bid Item with Single UPS is Completed, the ‘C’ Estimate is created or updated, a system message is generated and the WA Cost Estimate field is set to the proper value with the words: ‘C Level’ added.

Figure 9.18 Maintain Bid Item Design screen - Complete with Single UPS



When a Tender Bid Item with Alternatives (Common + Alternatives or Alternatives) is Completed, a system message is generated that the update was successful. The WA Cost Estimate field is not changed.

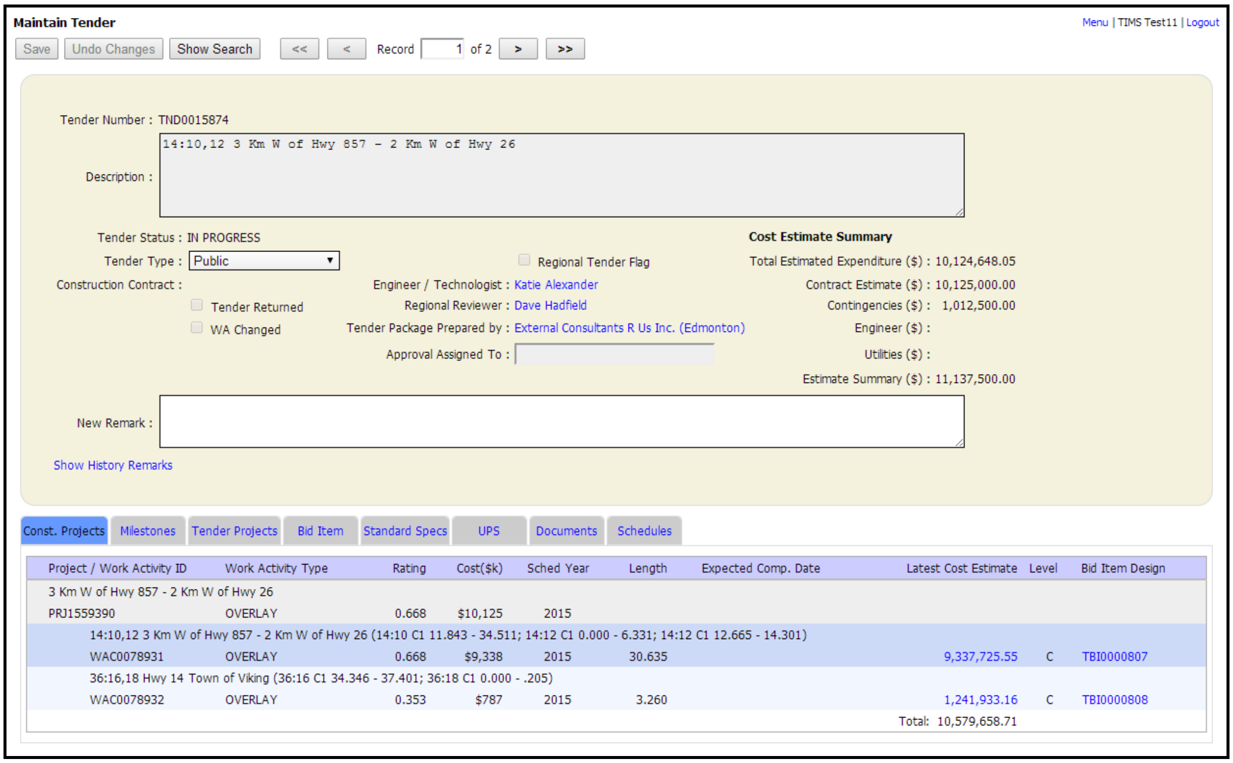
Figure 9.19 Maintain Bid Item Design screen - Complete with Alternatives



The values in the Cost Estimate Summary area, on the Maintain Tender screen, are updated according to the new ‘C’ Level Estimates.

Alert! The ‘C’ Estimate (Total Estimated Expenditure) shall not include any estimate of inflation to account for any potential or expected delay in the actual tendering of the project.

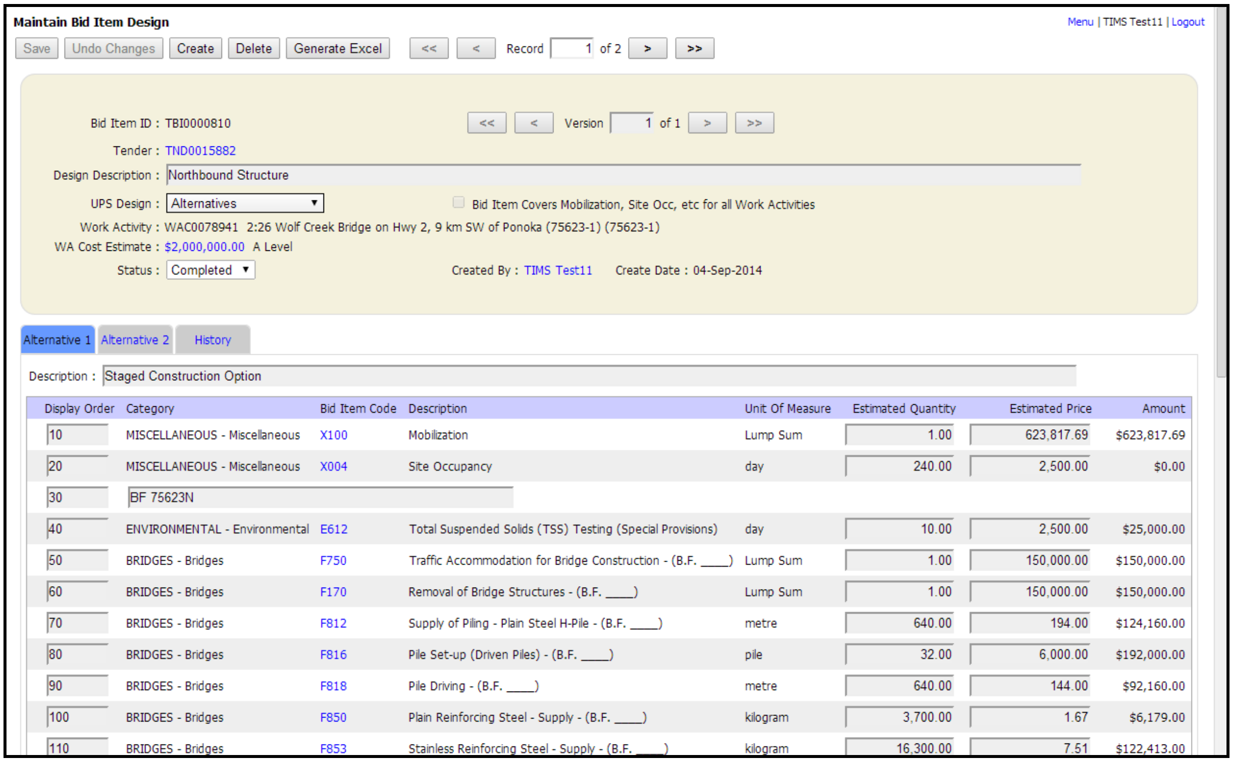
Figure 9.20 Maintain Bid Item Design screen - Cost Estimate Summary changed



Changing ‘C’ Estimates between Alternatives

Each Alternative tab has a ‘C’ Level Estimate from Total link at the bottom of the Bid Item list. This link is used to set/change the ‘C’ Level Estimate for the Tender Bid Item to the total value of the alternative.

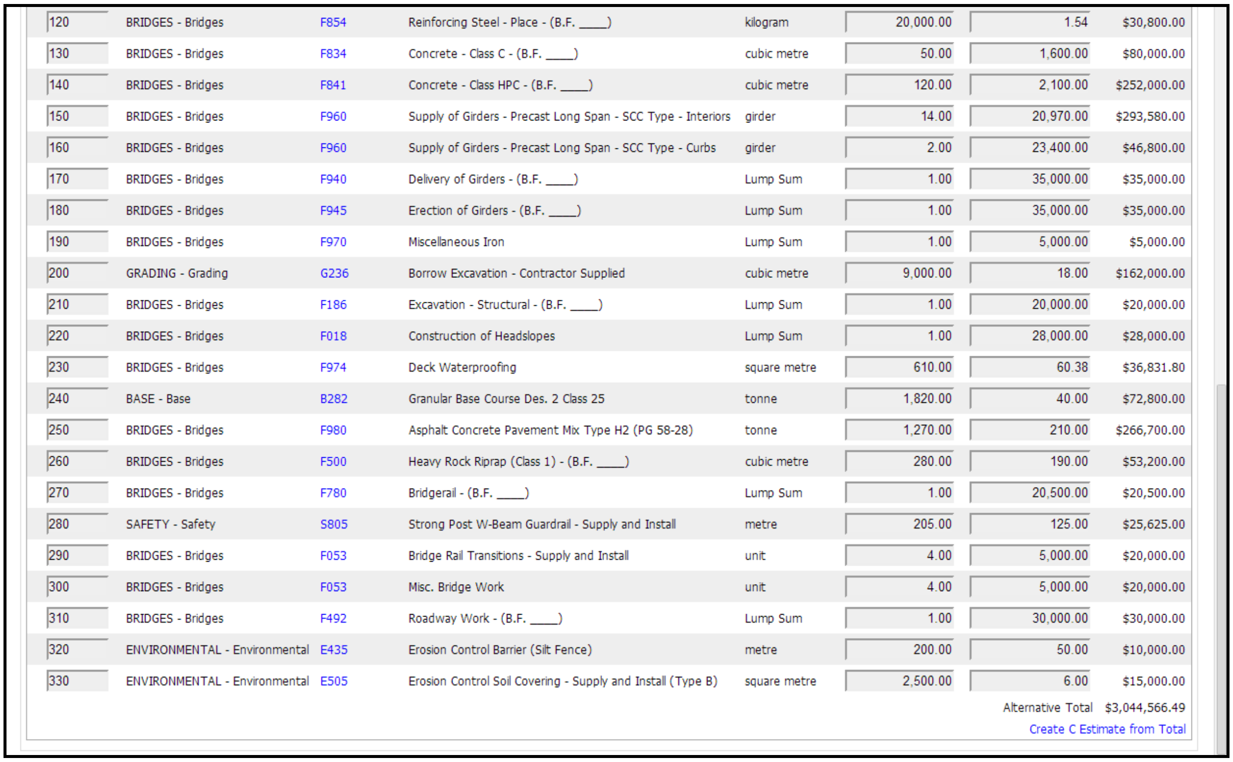
Figure 9.21 Maintain Bid Item Design screen - Alternatives - C Estimate original



How To

1. Select the **Alternative** tab that contains the values to be used.
2. Scroll to the bottom of the screen.
3. Select the **Create C Estimate from Total** link.
4. From the *Create C Level Estimate from Total* window confirm the **C Level Cost**.
5. Select the **Save** button.

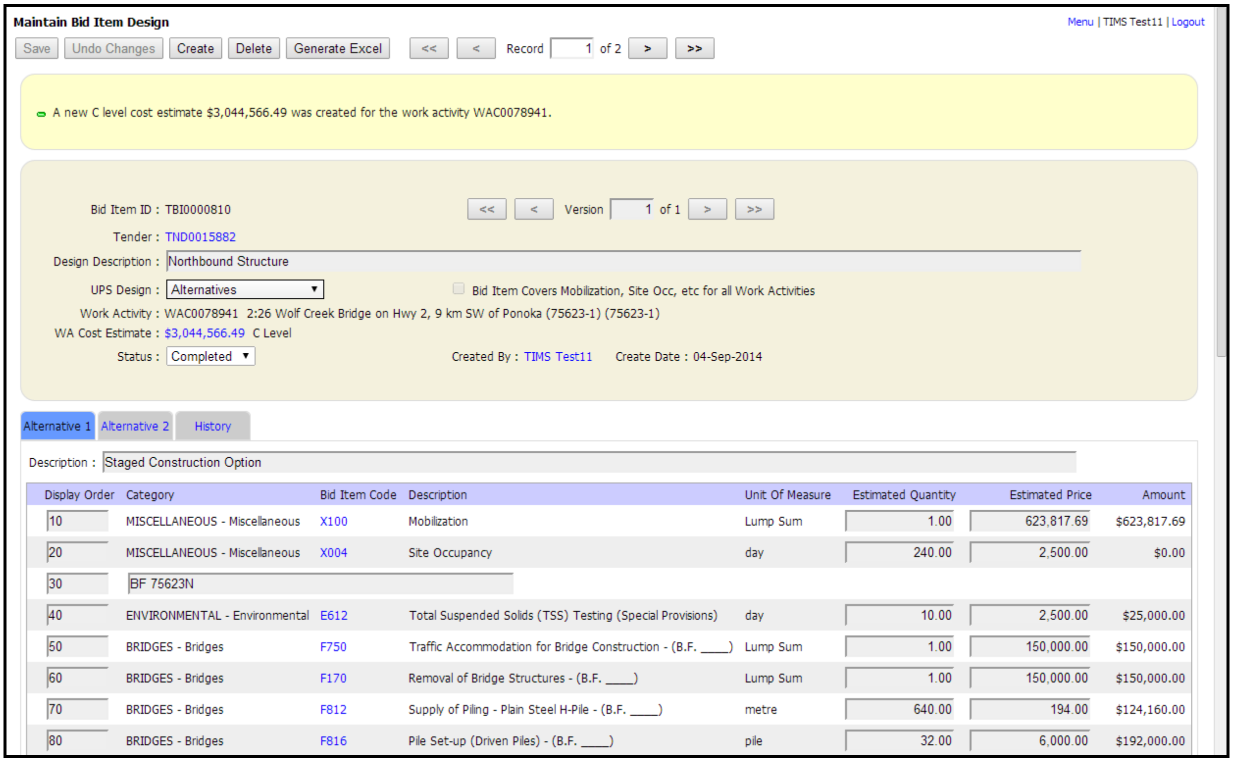
Figure 9.22 Maintain Bid Item Design screen -Alternatives - Create C Level Estimate link



120	BRIDGES - Bridges	F854	Reinforcing Steel - Place - (B.F. ____)	kilogram	20,000.00	1.54	$30,800.00
130	BRIDGES - Bridges	F834	Concrete - Class C - (B.F. ____)	cubic metre	50.00	1,600.00	$80,000.00
140	BRIDGES - Bridges	F841	Concrete - Class HPC - (B.F. ____)	cubic metre	120.00	2,100.00	$252,000.00
150	BRIDGES - Bridges	F960	Supply of Girders - Precast Long Span - SCC Type - Interiors	girder	14.00	20,970.00	$293,580.00
160	BRIDGES - Bridges	F960	Supply of Girders - Precast Long Span - SCC Type - Curbs	girder	2.00	23,400.00	$46,800.00
170	BRIDGES - Bridges	F940	Delivery of Girders - (B.F. ____)	Lump Sum	1.00	35,000.00	$35,000.00
180	BRIDGES - Bridges	F945	Erection of Girders - (B.F. ____)	Lump Sum	1.00	35,000.00	$35,000.00
190	BRIDGES - Bridges	F970	Miscellaneous Iron	Lump Sum	1.00	5,000.00	$5,000.00
200	GRADING - Grading	G236	Borrow Excavation - Contractor Supplied	cubic metre	9,000.00	18.00	$162,000.00
210	BRIDGES - Bridges	F186	Excavation - Structural - (B.F. ____)	Lump Sum	1.00	20,000.00	$20,000.00
220	BRIDGES - Bridges	F018	Construction of Headslopes	Lump Sum	1.00	28,000.00	$28,000.00
230	BRIDGES - Bridges	F974	Deck Waterproofing	square metre	610.00	60.38	$36,831.80
240	BASE - Base	B282	Granular Base Course Des. 2 Class 25	tonne	1,820.00	40.00	$72,800.00
250	BRIDGES - Bridges	F980	Asphalt Concrete Pavement Mix Type H2 (PG 58-28)	tonne	1,270.00	210.00	$266,700.00
260	BRIDGES - Bridges	F500	Heavy Rock Riprap (Class 1) - (B.F. ____)	cubic metre	280.00	190.00	$53,200.00
270	BRIDGES - Bridges	F780	Bridgerail - (B.F. ____)	Lump Sum	1.00	20,500.00	$20,500.00
280	SAFETY - Safety	S805	Strong Post W-Beam Guardrail - Supply and Install	metre	205.00	125.00	$25,625.00
290	BRIDGES - Bridges	F053	Bridge Rail Transitions - Supply and Install	unit	4.00	5,000.00	$20,000.00
300	BRIDGES - Bridges	F053	Misc. Bridge Work	unit	4.00	5,000.00	$20,000.00
310	BRIDGES - Bridges	F492	Roadway Work - (B.F. ____)	Lump Sum	1.00	30,000.00	$30,000.00
320	ENVIRONMENTAL - Environmental	E435	Erosion Control Barrier (Silt Fence)	metre	200.00	50.00	$10,000.00
330	ENVIRONMENTAL - Environmental	E505	Erosion Control Soil Covering - Supply and Install (Type B)	square metre	2,500.00	6.00	$15,000.00
						Alternative Total	$3,044,566.49
							Create C Estimate from Total

Figure 9.23 Maintain Bid Item Design screen - Alternatives - Create C Level Estimate window

Figure 9.24 Maintain Bid Item Design screen - Alternatives - C Level Estimate changed



Edit Tender Bid Item Details

Professional Service - Tender Services is responsible for adding new Bid Items into PMA Delivery. The way the Bid Items are constructed by Professional Services - Tender Services, can impose additional work on the External Consultant.

Some Bid Items can be used multiple times as long as a distinction can be made. There are several methods of distinguishing each instance of the same Bid Item Code. For example, entering a different description for each instance in the Override, or Supplemental description fields. The duplicate rule is invoked when the Maintain Bid Item Design screen is saved.

Alert! Saving the Tender Bid Item will force the duplicate rule to be applied and Bid Items identified.

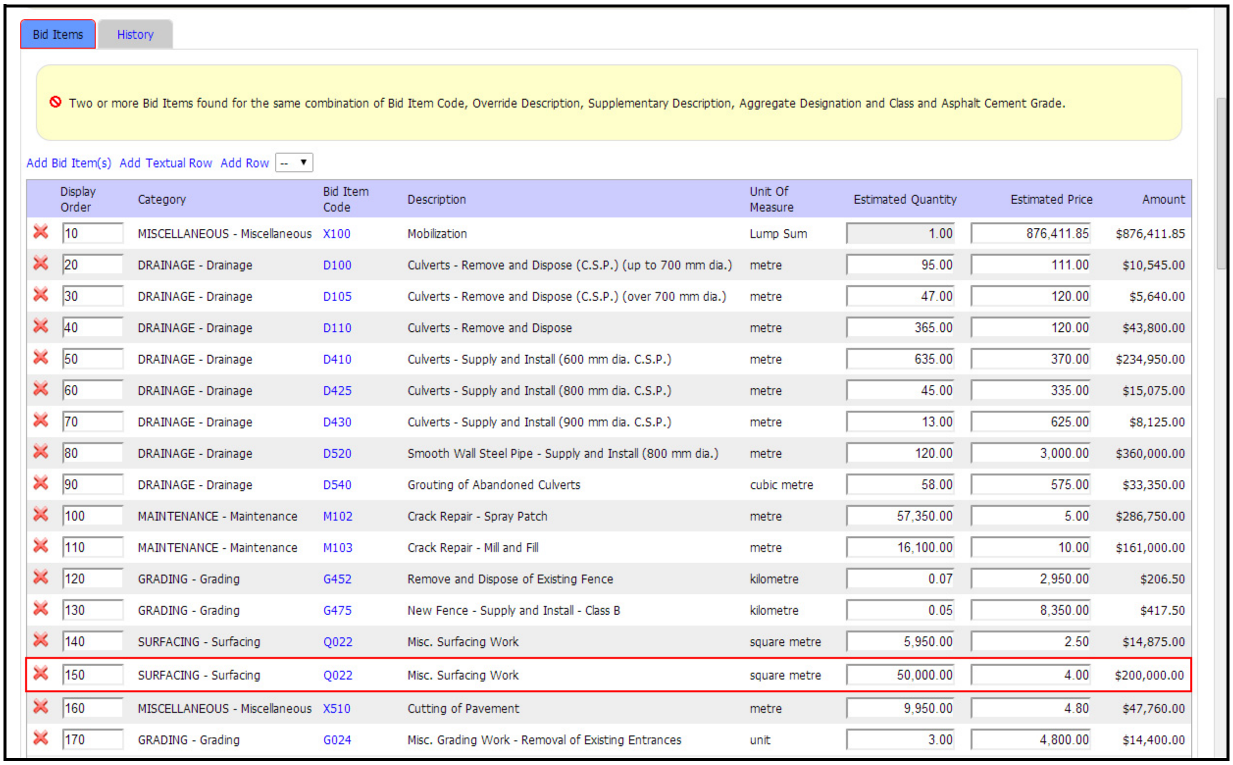
Some Bid Items require additional information. For example, if the Bid Item Supply is 'Optional', a choice needs to be made. If Supplementary information was created, data will need to be entered. If Price or Quantity fields were set to mandatory, values need to be entered. Most of these rules are invoked when the Tender Bid Items status is set to Completed.

Alert! Completing the Tender Bid Item will force the rules to be applied and errors or omissions to be identified.

To make the missing entries (with the exception of Quantities and Prices) the Bid Item Detail window is needed. Clicking the Bid Item Code will display this window.

Alert! Saving any edits made on the Bid Item Details window requires a Save on the Maintain Bid Item Design screen.

Figure 9.25 Maintain Bid Item Design screen - Duplicate Bid Item error



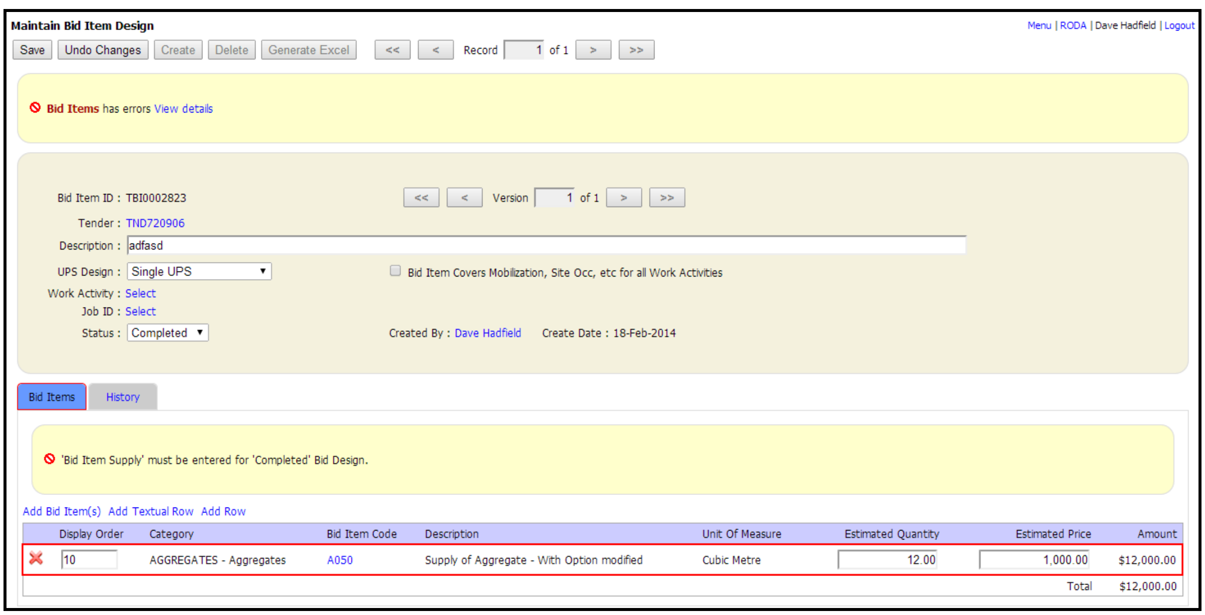
Bid Items | History

Two or more Bid Items found for the same combination of Bid Item Code, Override Description, Supplementary Description, Aggregate Designation and Class and Asphalt Cement Grade.

Add Bid Item(s) Add Textual Row Add Row --

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	876,411.85	$876,411.85
20	DRAINAGE - Drainage	D100	Culverts - Remove and Dispose (C.S.P.) (up to 700 mm dia.)	metre	95.00	111.00	$10,545.00
30	DRAINAGE - Drainage	D105	Culverts - Remove and Dispose (C.S.P.) (over 700 mm dia.)	metre	47.00	120.00	$5,640.00
40	DRAINAGE - Drainage	D110	Culverts - Remove and Dispose	metre	365.00	120.00	$43,800.00
50	DRAINAGE - Drainage	D410	Culverts - Supply and Install (600 mm dia. C.S.P.)	metre	635.00	370.00	$234,950.00
60	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	45.00	335.00	$15,075.00
70	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	13.00	625.00	$8,125.00
80	DRAINAGE - Drainage	D520	Smooth Wall Steel Pipe - Supply and Install (800 mm dia.)	metre	120.00	3,000.00	$360,000.00
90	DRAINAGE - Drainage	D540	Grouting of Abandoned Culverts	cubic metre	58.00	575.00	$33,350.00
100	MAINTENANCE - Maintenance	M102	Crack Repair - Spray Patch	metre	57,350.00	5.00	$286,750.00
110	MAINTENANCE - Maintenance	M103	Crack Repair - Mill and Fill	metre	16,100.00	10.00	$161,000.00
120	GRADING - Grading	G452	Remove and Dispose of Existing Fence	kilometre	0.07	2,950.00	$206.50
130	GRADING - Grading	G475	New Fence - Supply and Install - Class B	kilometre	0.05	8,350.00	$417.50
140	SURFACING - Surfacing	Q022	Misc. Surfacing Work	square metre	5,950.00	2.50	$14,875.00
150	SURFACING - Surfacing	Q022	Misc. Surfacing Work	square metre	50,000.00	4.00	$200,000.00
160	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	metre	9,950.00	4.80	$47,760.00
170	GRADING - Grading	G024	Misc. Grading Work - Removal of Existing Entrances	unit	3.00	4,800.00	$14,400.00

Figure 9.26 Maintain Bid Item Design screen - Bid Item Supply error



Maintain Bid Item Design

Menu | RODA | Dave Hadfield | Logout

Save | Undo Changes | Create | Delete | Generate Excel | << | < | Record 1 of 1 | > | >>

Bid Items has errors View details

Bid Item ID : TBI0002823

<< | < | Version 1 of 1 | > | >>

Tender : TND720906

Description : adfasd

UPS Design : Single UPS

Bid Item Covers Mobilization, Site Occ, etc for all Work Activities

Work Activity : Select

Job ID : Select

Status : Completed

Created By : Dave Hadfield Create Date : 18-Feb-2014

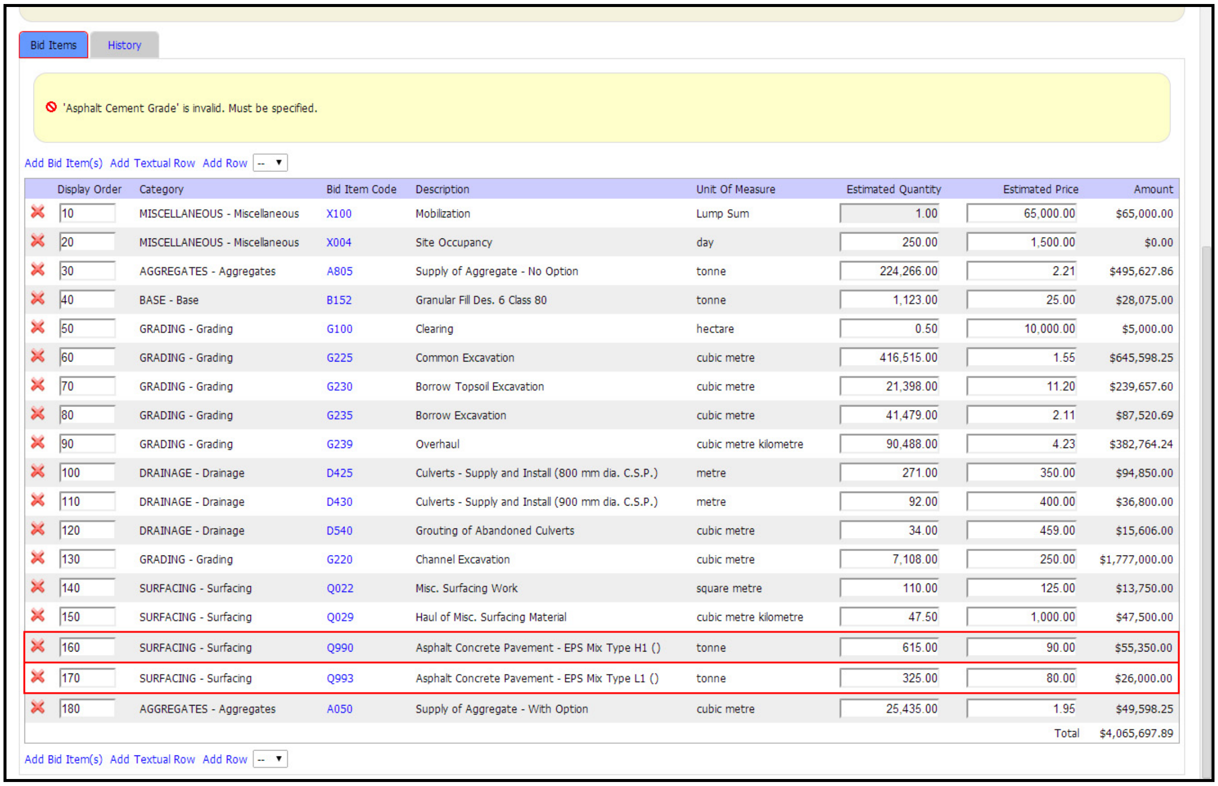
Bid Items | History

'Bid Item Supply' must be entered for 'Completed' Bid Design.

Add Bid Item(s) Add Textual Row Add Row

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	AGGREGATES - Aggregates	A050	Supply of Aggregate - With Option modified	Cubic Metre	12.00	1,000.00	$12,000.00
						Total	$12,000.00

Figure 9.27 Maintain Bid Item Design screen - Bid Item Grade error


Bid Items History

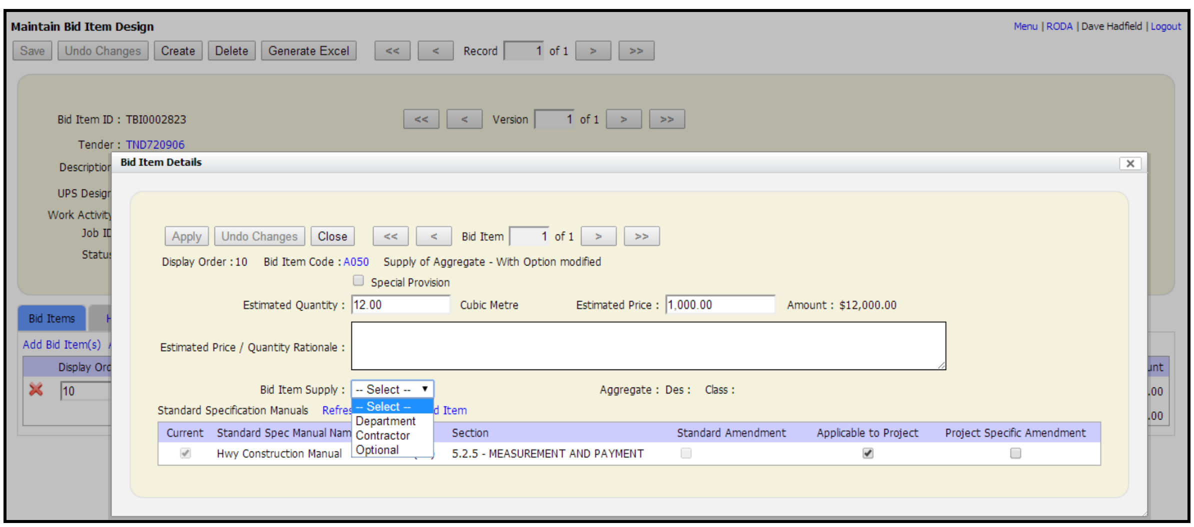
'Asphalt Cement Grade' is invalid. Must be specified.

Add Bid Item(s) Add Textual Row Add Row --

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	65,000.00	$65,000.00
20	MISCELLANEOUS - Miscellaneous	X004	Site Occupancy	day	250.00	1,500.00	$0.00
30	AGGREGATES - Aggregates	A805	Supply of Aggregate - No Option	tonne	224,266.00	2.21	$495,627.86
40	BASE - Base	B152	Granular Fill Des. 6 Class 80	tonne	1,123.00	25.00	$28,075.00
50	GRADING - Grading	G100	Clearing	hectare	0.50	10,000.00	$5,000.00
60	GRADING - Grading	G225	Common Excavation	cubic metre	416,515.00	1.55	$645,598.25
70	GRADING - Grading	G230	Borrow Topsoil Excavation	cubic metre	21,398.00	11.20	$239,657.60
80	GRADING - Grading	G235	Borrow Excavation	cubic metre	41,479.00	2.11	$87,520.69
90	GRADING - Grading	G239	Overhaul	cubic metre kilometre	90,488.00	4.23	$382,764.24
100	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	271.00	350.00	$94,850.00
110	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	92.00	400.00	$36,800.00
120	DRAINAGE - Drainage	D540	Grouting of Abandoned Culverts	cubic metre	34.00	459.00	$15,606.00
130	GRADING - Grading	G220	Channel Excavation	cubic metre	7,108.00	250.00	$1,777,000.00
140	SURFACING - Surfacing	Q022	Misc. Surfacing Work	square metre	110.00	125.00	$13,750.00
150	SURFACING - Surfacing	Q029	Haul of Misc. Surfacing Material	cubic metre kilometre	47.50	1,000.00	$47,500.00
160	SURFACING - Surfacing	Q990	Asphalt Concrete Pavement - EPS Mix Type H1 ()	tonne	615.00	90.00	$55,350.00
170	SURFACING - Surfacing	Q993	Asphalt Concrete Pavement - EPS Mix Type L1 ()	tonne	325.00	80.00	$26,000.00
180	AGGREGATES - Aggregates	A050	Supply of Aggregate - With Option	cubic metre	25,435.00	1.95	$49,598.25
						Total	$4,065,697.89

Add Bid Item(s) Add Textual Row Add Row --

Figure 9.28 Maintain Bid Item Design screen - Bid Item Details window



Supplementary Edits

There are several supplementary edits that can occur: some that involve text in the description and others that are used to populate placeholders. A Supplementary Description allows the user to add to the existing description of the Bid Item.

Figure 9.29 Bid Item Details window - Supplementary Descr example 1

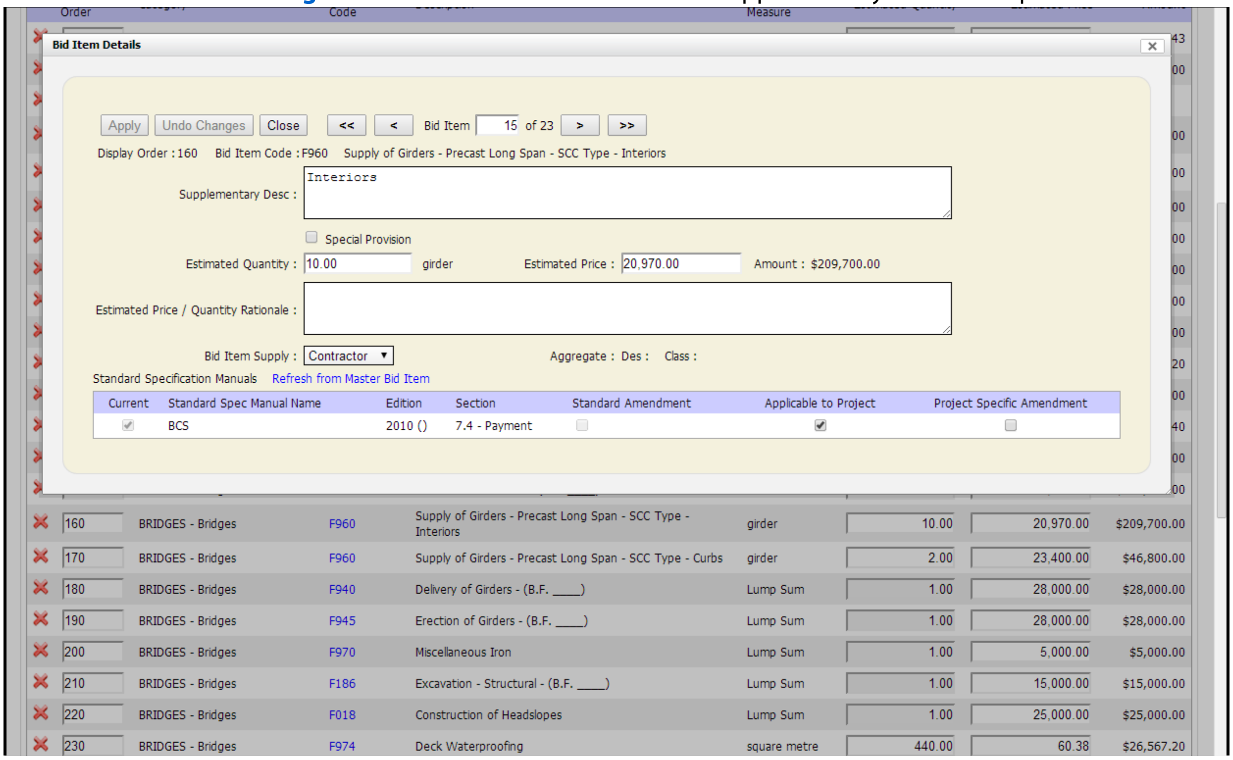
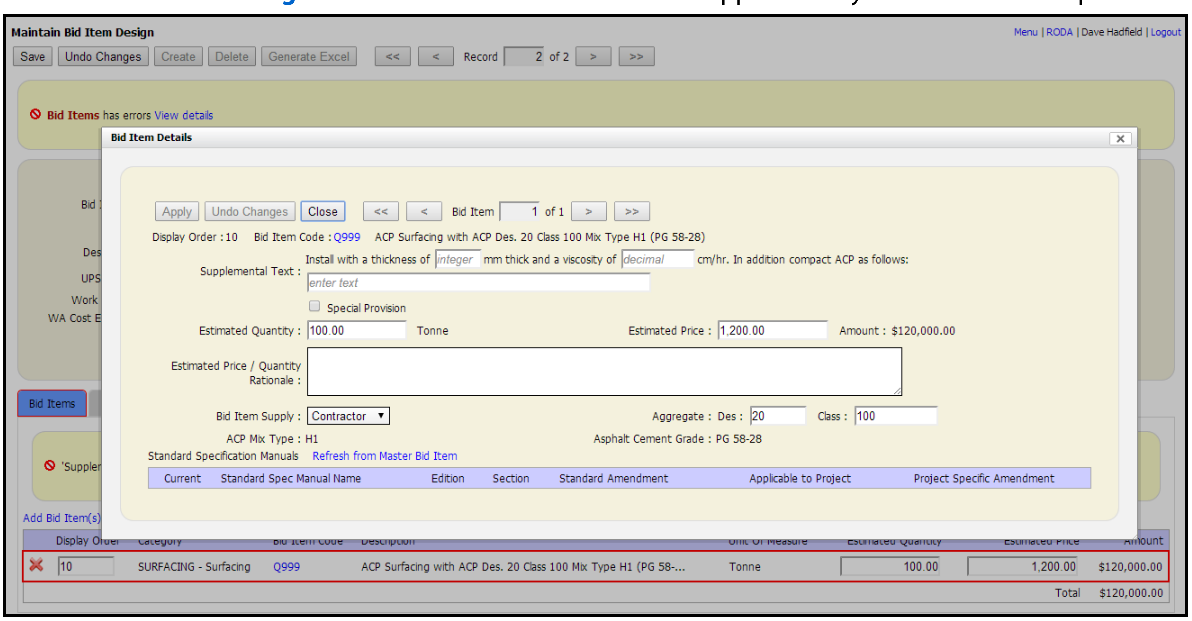


Figure 9.30 Bid Item Details window - Supplementary Placeholders example 2



Override Edits

An Override Description allows the user to completely rewrite the description of the Bid Item.

Figure 9.31 Bid Item Details window - Override Description

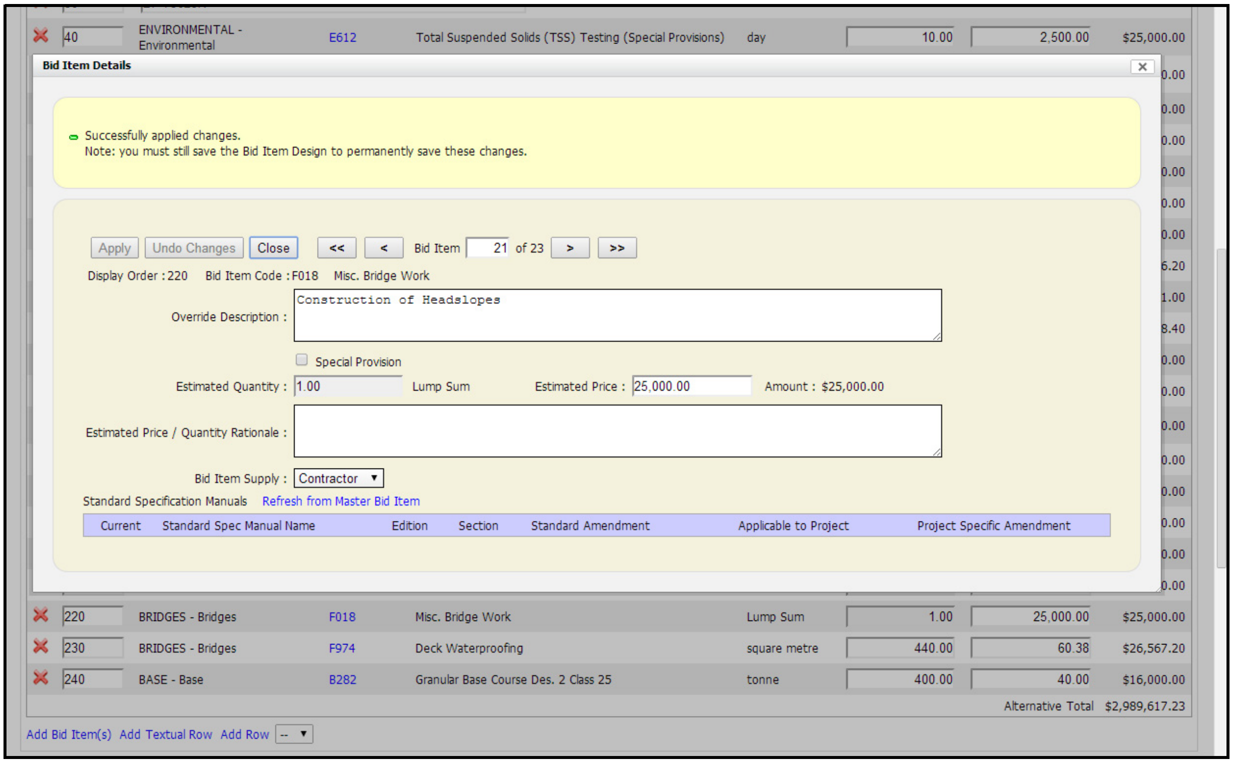
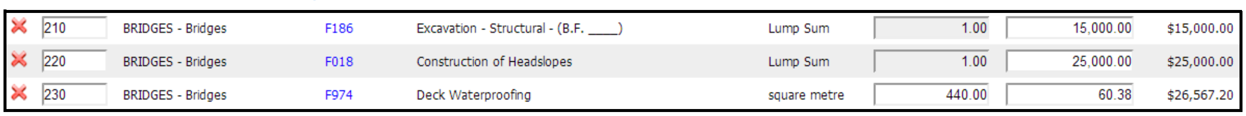


Figure 9.32 Bid Item Details window - Override Description Updated



Grade Edits

For some Bid Items like Aggregates and Asphalt, the grade may need to be specified in the Bid Item Details window. Figure 9.33 below shows an Asphalt Cement Grade example. Bid Item Q990 is a Type H1 and Q993 is a Type L1 two different Bid Item codes but both need a Cement Grade specified.

Figure 9.33 Bid Item Details window - Grade example

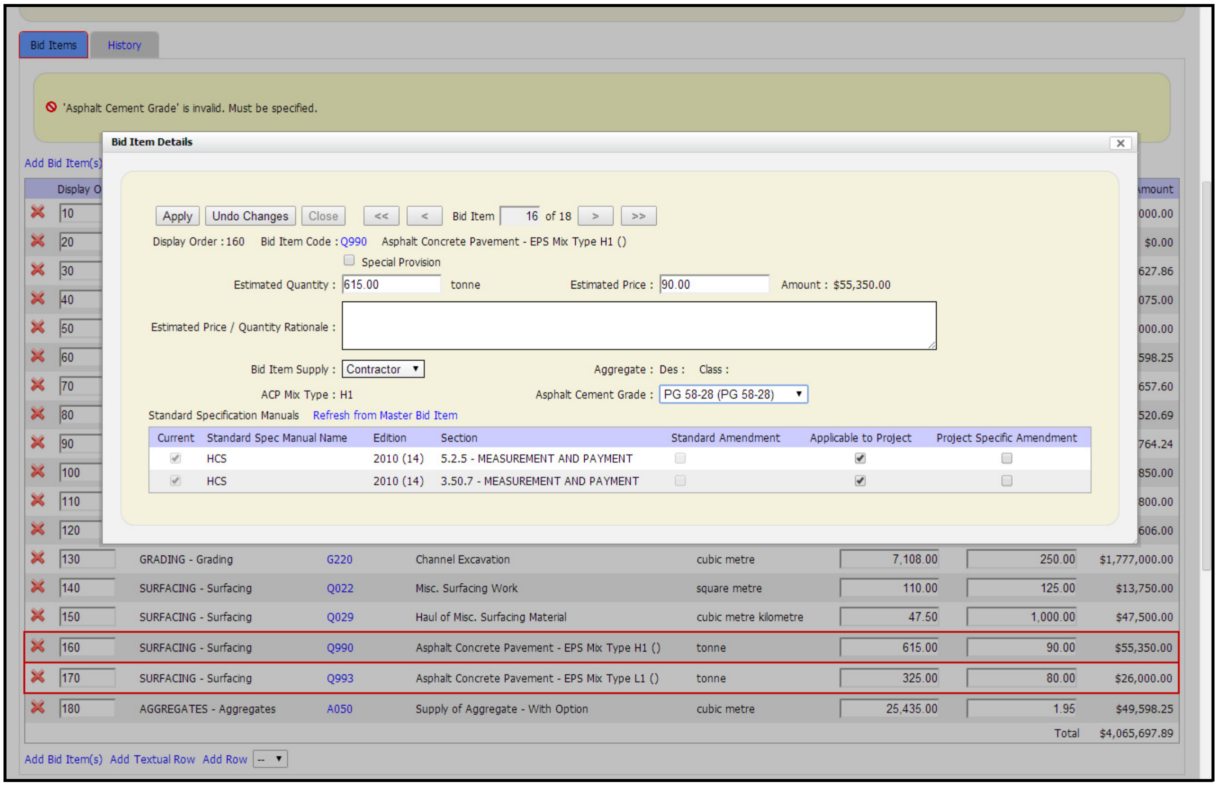
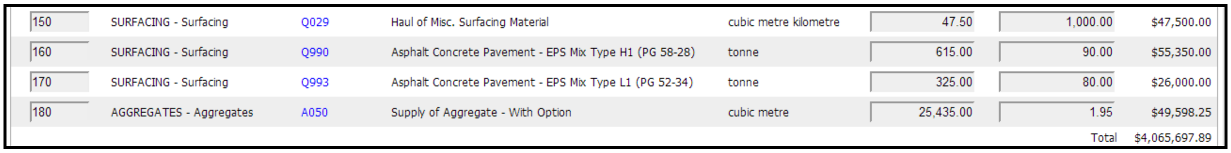


Figure 9.34 Bid Item Details window - Grade Updated example



Delete Tender Bid Item

If a Tender Bid Item Design is not required, it can be deleted any time up until the Tender Advertised 'Actual Date' has been entered on the Milestones tab of the Maintain Tender screen.

Alert! Deleting is completely different than Removing. You delete the Tender Bid Item from PMA altogether. You Remove a Tender Bid Item from an Addendum.

In the examples below notice that in the beginning (Figure 9.35 below) shows TBI0000009 as being the second of two tender bid items for TND0015329. After it is deleted (Figure 9.37 on page 9-33), TBI0000008 is displayed and it is the only Tender Bid Item for the Tender.

Figure 9.35 Maintain Bid Item Design screen - Delete Bid Item

Figure 9.36 Maintain Bid Item Design screen - Delete Bid Item Confirmation

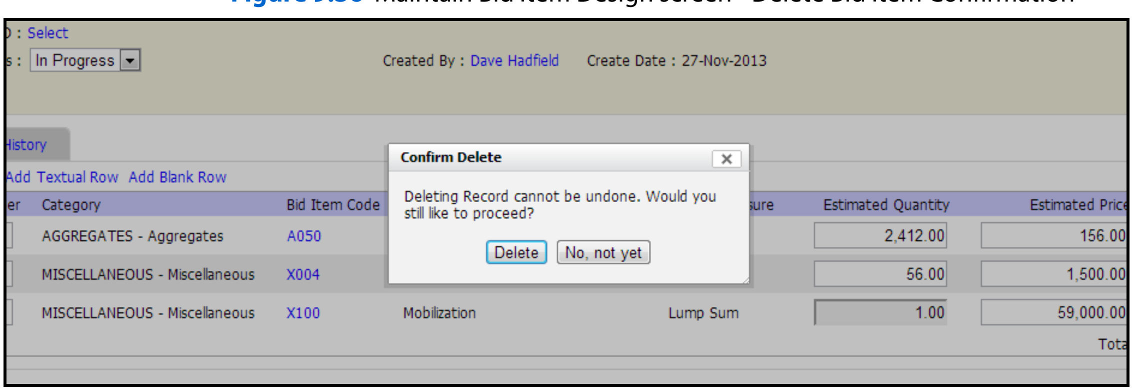
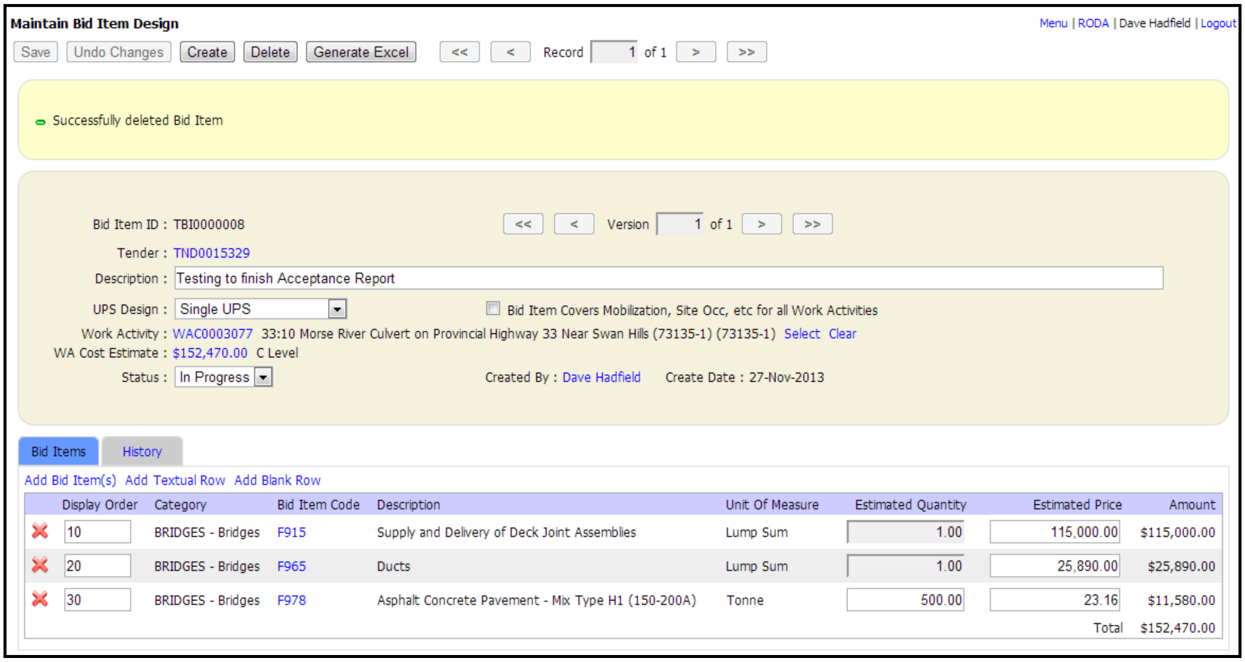


Figure 9.37 Maintain Bid Item Design screen - Bid Item Deleted



Chapter 10: Maintain UPS Section Screen

This chapter only goes so far as defining the fields on the Maintain UPS Section screen including the Bid Item, Merged Bid Items, UPS, and History tabs. The following chapter covers creating UPS Sections and how to merge or delete sections.

Topics in Chapter:

1. Tender UPS Background
2. Tender UPS Tab
3. Maintain UPS Section Screen
4. Bid Items Tab
5. Merged Bid Items Tab
6. UPS Tab
7. History Tab

Tender UPS Background

The Unit Price Schedule is created as a result of the Tender Package created by the Consulting Engineer. The UPS lists the Bid Items required to perform the construction function and complete the Construction Project with all included work activities. The list will provide the ability to enter estimated quantities and/or prices for each Bid Item. These ‘schedules’ are used by the construction companies bidding on the tender, to provide the detailed breakdown of their costs. The bidder responds to the tender by entering their proposed quantities and prices for the bid items listed on the UPS.

A Tender will contain one Unit Price Schedule. The UPS may contain one or more sections - usually labeled ‘A’, ‘B’, ‘C’, etc. A UPS Section may contain one or more Tender Bid Items.

In this chapter we will look at the screens used in creating the UPS Sections.

A Tender may contain one or more UPS Sections. If there are different methods or materials that can be used to complete a work activity - ‘alternative’ UPS Sections can be created with each listing the bid items specific to one method versus the other. Sections can also be used to distinguish funding authorities used in the construction effort. For example, UPS Section ‘A’ could list the Bid Items funded by Alberta Transportation and UPS Section ‘B’ could list the Bid Items funded by the Municipality.

Tender UPS Tab

The UPS tab is used to create and list Unit Price Schedule Sections. Creating a UPS provides the ability to organize Bid Items (entered on the Bid Item tab) into UPS Sections. The Sections can be created in two ways: using the ‘Generate UPS Sections from Bid Items’ link to automatically build sections based on existing Tender Bid Items, or using the ‘Create UPS’ link to manually build each UPS section. Once a UPS Section has been created, the Generate UPS link is removed from the screen, but a Print UPS and an Extract UPS to Excel link are added.

Figure 10.1 Maintain Tender screen – UPS tab Blank

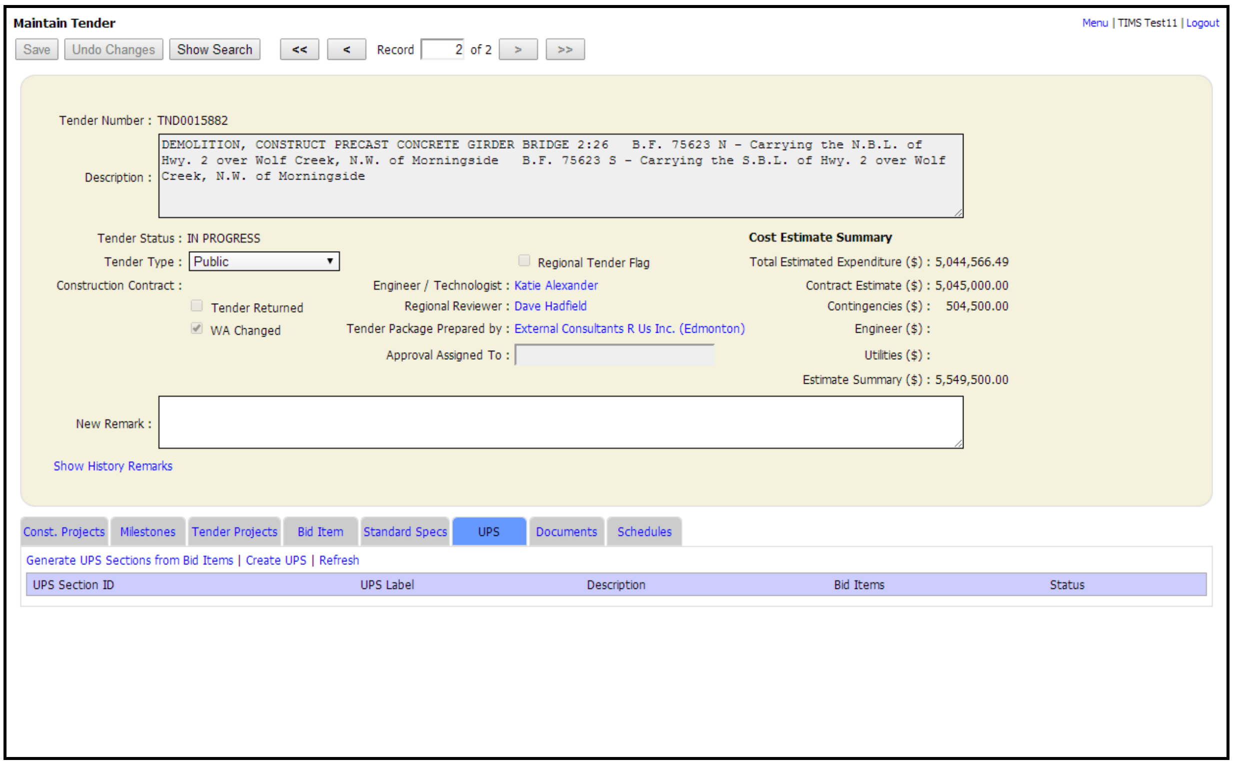


Figure 10.2 Maintain Tender screen – UPS tab example

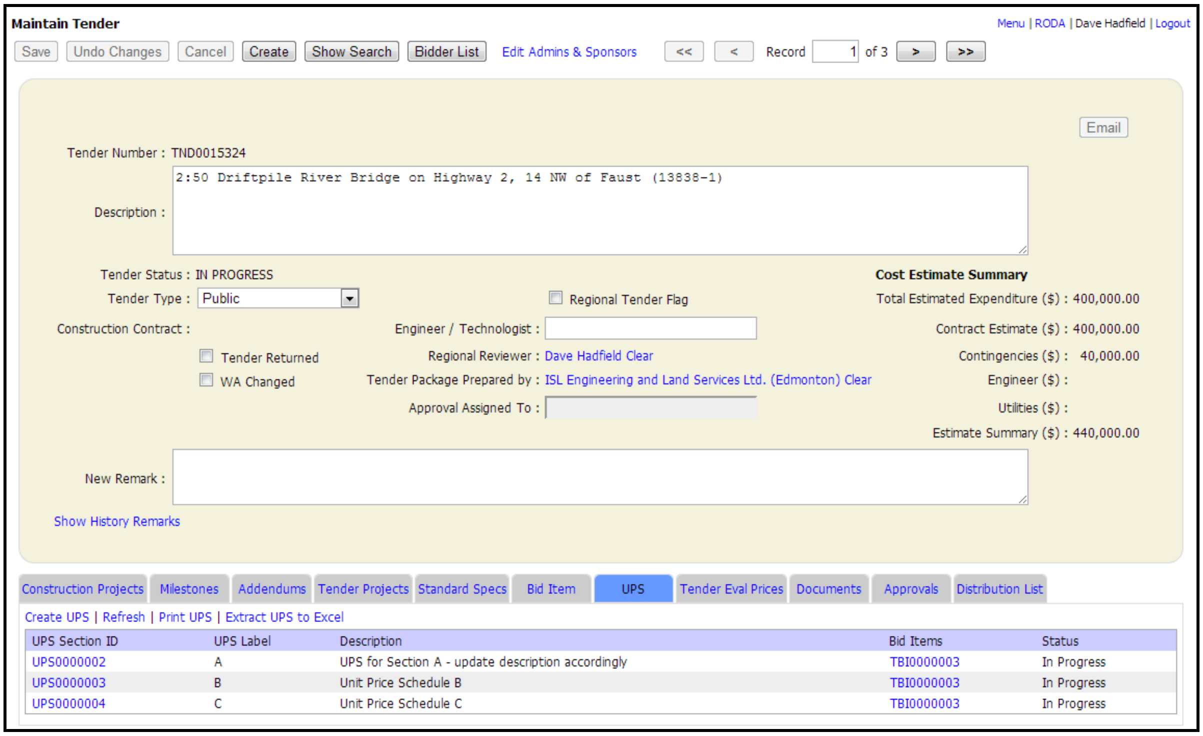


Table 10.1 Maintain Tender screen - UPS tab - field definitions

Field	Description
Generate UPS Sections from Bid Items	This link will create Unit Price Schedule Sections based on the Tender Bid Items (see Figure 10.1 on page 10-3).
Create UPS	This link displays the Create UPS Section screen for manually building a UPS Section.
Print UPS	Generates the UPS (all sections) in PDF format.
Extract UPS to Excel	Generates the UPS (all sections as work sheets) in MS Excel format.
UPS Section ID	Displays the Unit Price Schedule Section number (UPS0000001) as a clickable link to the Maintain UPS Section screen.
UPS Label	Displays the Label (A, B, C) assigned to the UPS Section.
Description	Displays the textual description of the UPS Section as entered by the user on the Maintain UPS Section screen.
Bid Items	Displays the Tender Bid Item ID (TBI0000001) used in the UPS Section.
Status	Displays the current status of the UPS Section (In Progress, Completed, Removed).

Maintain UPS Section Screen

The Maintain UPS Section screen is available to view and maintain the Unit Price Schedule Sections that are included in the tender package. Tenders may have one or more UPS sections in a Tender package and this screen allows the Engineering Consultant or Project Administrator to maintain each section.

Figure 10.3 Maintain UPS Section screen – General example

Table 10.2 Maintain UPS Section screen - General - field definitions

Field	Description
Create (button)	This button allows the user to create a new UPS Section.
Delete (button)	This button will delete the UPS Section from PMA and any Evaluation Combinations, and can be used up until the Tender receives a Tender Advertised ‘Actual Date’ (see Removed Status). Addenda will also impact the availability of the Delete button.
UPS Section ID	This is a unique identifier that is system generated and display only (UPS0000001).
Version	This is a unique identifier that reflects the version of the UPS Section currently displayed. The default is to display the most current version but allow users to view earlier versions. Versioning stems from creating addenda.
Tender	Displays the associated Tender Number (TND0000001) as a clickable link to the Maintain Tender screen.
Addendum Details	Only displays for versions related to an addendum: “Addendum Number - Description”.
Description	A textual description of the Unit Price Schedule Section. Note: the description is displayed in the title of the “Print UPS” document (PDF).

Table 10.2 Maintain UPS Section screen - General - field definitions

Field	Description
UPS Label	The label for the UPS Section within the overall UPS. Note: the Label is displayed in sub-titles on the “Print UPS” document (PDF).
Include in Contract	Defaults to checked. If checked; at the time the construction contract is generated, the Bid Items associated with Work Activities in the UPS Section, are copied into the Bid Item tab on the Maintain Contract screen.
Status	Displays the current status of the UPS Section (i.e. In Progress, Completed, Removed).
Created By/Date	The name of the individual who created the UPS and the date.

Hint: When the UPS Section does not have a status of In Progress or the version being displayed is not the most current (including any addendum to the Tender), the fields on the Maintain UPS Section screen will be view only.

Hint: Once the Tender includes Bids that have UPS Section Bid Item Prices, the fields on the Maintain UPS Section screen will be view only.

Bid Items Tab

The Bid Item tab is used to add Tender Bid Items (Designs) to the UPS Section. The Tender Bid Items were created on the Bid Item tab of the Maintain Tender screen. The Tender Bid Items provide the content for the Unit Price Schedule Section. One or more Tender Bid Items can be used to create the UPS Section. Each Tender Bid Item added to the UPS Section can be treated as a separate list or it can be merged with another list.

Figure 10.4 Maintain UPS Section screen – Bid Items tab

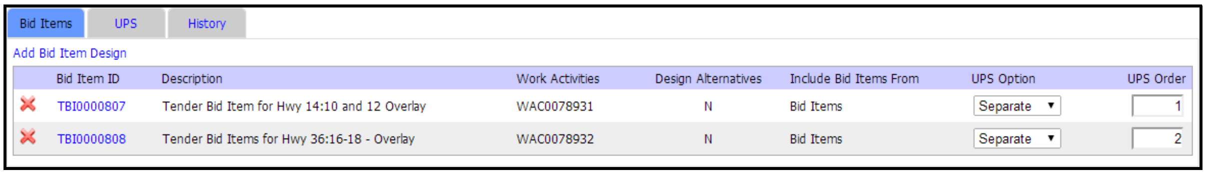


Table 10.3 Maintain UPS Section - Bid Items tab - field definitions

Field	Description
Add Bid Item Design (button)	This button allows the user to add one or more existing Tender Bid Items to the UPS Section.
Remove (button)	This button removes the Tender Bid Item from the UPS Section.
Bid Item ID	Displays the Tender Bid Item number (TBI0000001) as a clickable link to the Maintain Bid Item Design screen.
Description	Displays the description of the Tender Bid Item from the Maintain Bid Item Design screen.
Work Activities	For Tender Bid Items that identify a specific Work Activity.
Design Alternatives	Indicates (Y/N) if the Tender Bid Item was designed with alternatives or not.
Include Bid Items From	The Maintain Bid Item Design screen allows the creation of one or more tabs of Bid Items. The value in this column displays which tab (Bid Items, Common Bid Items, Alternative 1, Alternative 2) from the screen is used to supply the Bid Items.
UPS Option	Identifies if the UPS Section was built with Tender Bid Items being kept separate or merged together.
UPS Order	Used to indicate the order of the Tender Bid Items in the UPS Section (i.e. which Tender Bid Item Design is to appear first, second, third, etc. in the UPS). Merged Tender Bid Items must have the same UPS Order value.

UPS Option & UPS Order

The Bid Item tab may contain one or more Tender Bid Items. Each Tender Bid Item can be added as a 'Separate' or 'Merged' list of Bid Items. If two or more Tender Bid Items are flagged as Separate, then all Bid Items listed; the Bid Items for the first Tender Bid Item followed by the Bid Items for the second Tender Bid Item and so on. If two or more Tender Bid Items are flagged as Merged, the Bid Items from both are included. However, duplicate Bid Items are only listed once: with the quantities from the duplicate Bid Items added together. For merged Tender Bid Items, a new tab also appears called: 'Merged Bid Items'. This tab displays the outcome of the merge and allows the order of Bid Items to be changed.

Alert! All Tender Bid Items with a UPS Option of 'Merged' must have the same UPS Order value.

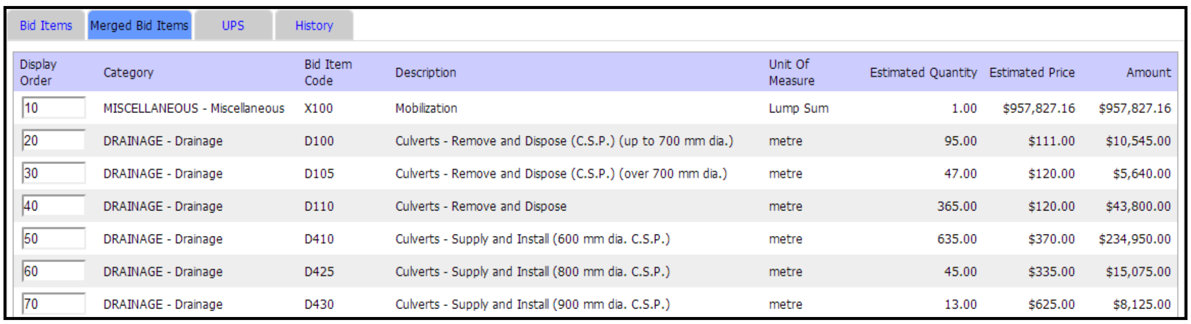
Alert! All duplicate Bid Items that are merged, must have the same Price before the UPS Section can be Completed. Quantities are totaled.

Merged Bid Items Tab

The Merged Bid Item tab displays the individual Bid Items included in the Tender Bid Items listed on the Bid Items tab. The Merged Bid Item tab is only displayed when the UPS Option for two or more Tender Bid Items is set to Merge. Merging Tender Bid Items will take the Tender Bid Items in one design and add them to the Tender Bid Items in another design.

Hint: The only editable field on the Merged Bid Items tab is the Display Order.

Figure 10.5 Maintain UPS Section screen – Merged Bid Items tab



Bid Items | Merged Bid Items | UPS | History

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	$957,827.16	$957,827.16
20	DRAINAGE - Drainage	D100	Culverts - Remove and Dispose (C.S.P.) (up to 700 mm dia.)	metre	95.00	$111.00	$10,545.00
30	DRAINAGE - Drainage	D105	Culverts - Remove and Dispose (C.S.P.) (over 700 mm dia.)	metre	47.00	$120.00	$5,640.00
40	DRAINAGE - Drainage	D110	Culverts - Remove and Dispose	metre	365.00	$120.00	$43,800.00
50	DRAINAGE - Drainage	D410	Culverts - Supply and Install (600 mm dia. C.S.P.)	metre	635.00	$370.00	$234,950.00
60	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	45.00	$335.00	$15,075.00
70	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	13.00	$625.00	$8,125.00

Table 10.4 Maintain UPS Section - Merged Bid Items tab - field definitions

Field	Description
Display Order	Displays the precedence (order) for the display of the Tender Bid Items in the UPS Section (how they appear in Print PDF and Extract UPS to Excel are also impacted).
Category	Displays the general category of the Bid Item (as defined in the master Bid Item table).
Bid Item Code	Displays the individual Bid Item number (D555, G169, etc.).
Description	Displays the description of the Bid Item as it was entered in the master Bid Item table or as edited by the user.
Unit of Measure	Displays how the Bid Item is measured (i.e. per day, per hour, per meter, per cubic meter, per tonne, etc.)
Estimated Quantity	The total number of ‘units’ estimated for the Bid Item (i.e. 500 tonnes, 15 days, 32 signs, etc).
Estimated Price	The per unit cost of the Bid Item (i.e. $4.23 per tonne, $1500 per day, $24.99 per sign, etc.). Note: if prices of merged Tender Bid Items, on the same Bid Item code are different, the UPS Section cannot be Completed.
Amount	A calculated dollar value using the Estimated Quantity times the Estimated Price.

UPS Tab

The UPS tab displays the final list of individual Bid Items and provides the ability to generate a Microsoft Excel file or a PDF file with those results. No matter how the Tender Bid Items are organized (separate/merged/combination), the UPS tab lists the final outcome (view only).

The Bid Items in the UPS tab impact two other processes further down line: entering Bids and the Bid Item tab on the Contract. The order of the Bid Items in the UPS tab, is the same order that they will appear in the Bidder tab. This is used by Tender Administration to enter Bids. The Bids associated with Work Activities will be copied to the Bid Item tab of the construction contract when it is generated.

Figure 10.6 Maintain UPS Section screen – UPS tab

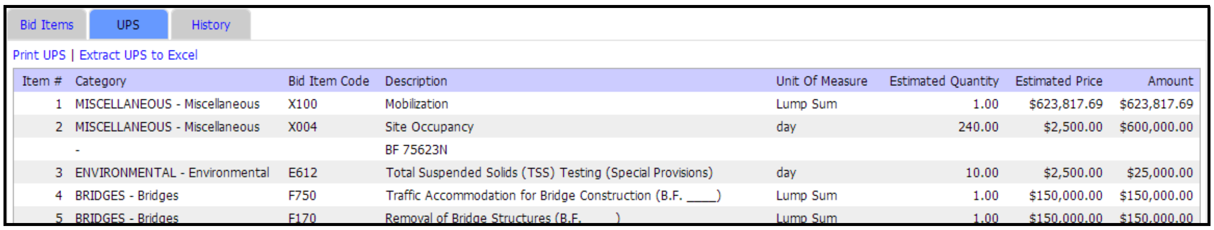


Table 10.5 Maintain UPS Section - UPS tab - field definitions

Field	Description
Print UPS (link)	This link generates a PDF version of the UPS Section.
Extract UPS to Excel (link)	This link generates a Microsoft Excel version of the UPS Section.
Item #	Displays the order that Bid Items will be listed in the UPS Section.
Category	Bid Items are categorized. Displays the group/category the Bid Item belongs to.
Bid Item Code	This is the Bid Item code established when the Bid Item was created and first entered into the master Bid Item table by the PS Tender Services user.
Description	Displays the description of the Bid Item.
Unit of Measure	Displays how the Bid Item is measured (i.e. per day, per hour, per meter, per cubic meter, per tonne, etc.)
Estimated Quantity	The number of ‘units’ estimated for the Bid Item (i.e. 500 tonnes, 15 days, 32 signs, etc).
Estimated Price	The per unit cost of the Bid Item (i.e. $4.23 per tonne, $1500 per day, $24.99 per sign, etc.).
Amount	A calculated dollar value using the Estimated Quantity times the Estimated Price.

History Tab

The History tab displays the changes that have taken place to the UPS Section since the Tender package was advertised (i.e. Tender Advertised 'Actual Date'). Therefore, changes would entail any addenda created.

Figure 10.7 Maintain UPS Section screen – History tab

Table 10.6 Maintain UPS Section - History tab - field definitions

Field	Description
Date	Displays the Date the Change was created.
User	Displays the User Name that created the Change.
Description	Displays the description explaining the change and the reason.

Chapter 11: Create Tender Unit Price Schedule

Generating the Unit Price Schedule should be performed by the Engineering Consultant submitting the Tender Package.

As the work on the Bid Items tab is completed, the Unit Price Schedule (UPS) can be generated. The UPS can contain one or more UPS Sections. A UPS Section identifies the Tender Bid Item(s) included. Sections may be created to provide alternative evaluation price combinations.

Topics in Chapter:

1. Generate UPS Sections from Tender Bid Items
2. Create UPS Section
3. Merge UPS Sections
4. Create UPS Sections from Alternative Tender Bid Items
5. Edit UPS Item Numbers
6. Municipality Example
7. Print or Extract UPS
8. Delete UPS Section

Generate UPS Sections Tender From Bid Items

Assuming that the Tender Bid Items have been entered on the Bid Item tab, PMA Delivery can automatically generate the UPS Sections based on the Tender Bid Items. However, it is still the responsibility of the External Consultant and subsequently the Project Administrator to ensure that each UPS Section generated, matches the corresponding UPS Section in section 2.2 of the Tender Document.

Alert! The Bid Items listed on the UPS tab (for all UPS Sections) MUST match section 2.2 of the Tender Document submitted by the Consultant. If the Bid Items, their order and/or the quantities for each do not match, expect the Tender to be returned for correction.

Figure 11.1 Maintain Tender screen – UPS tab blank

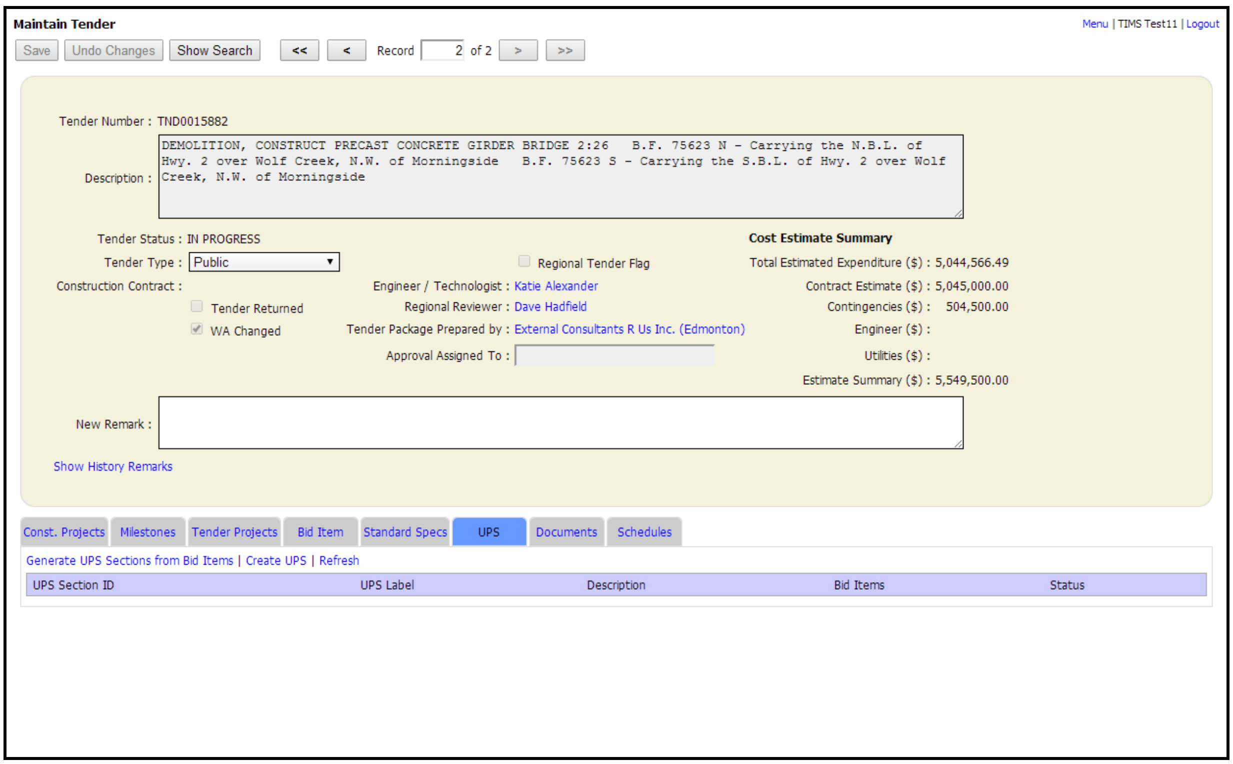
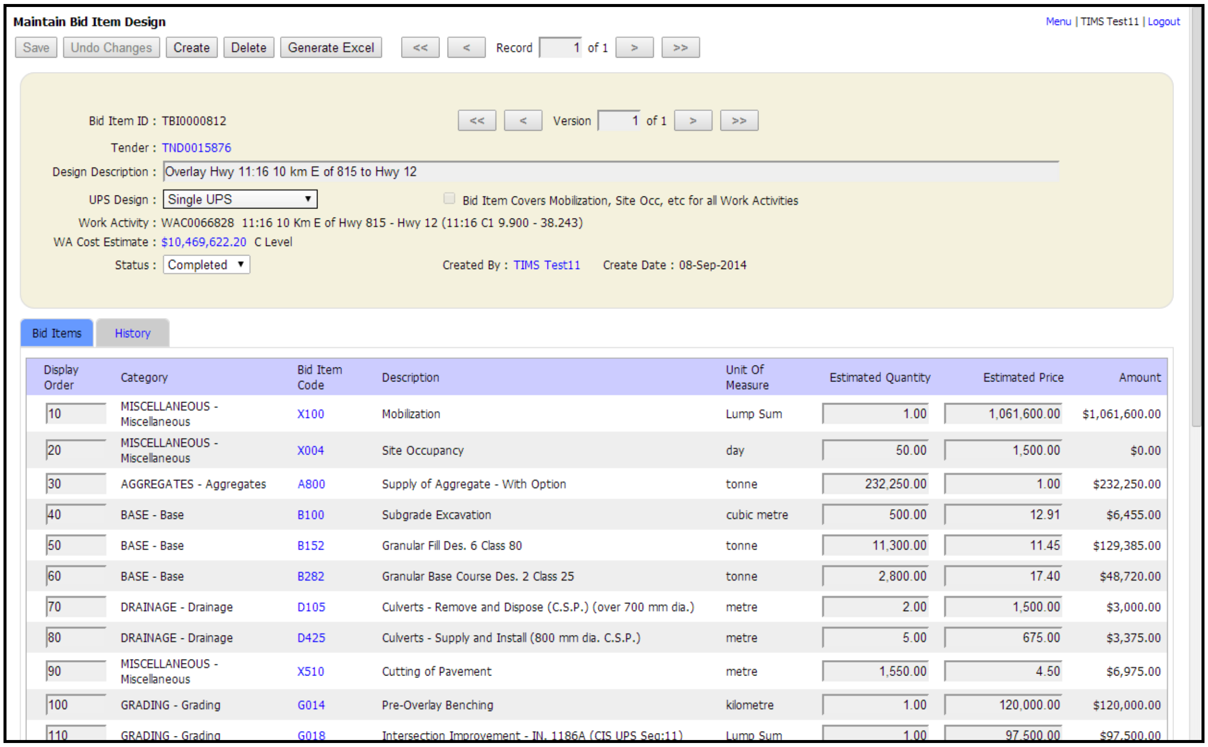


Figure 11.2 below shows the Tender Bid Item used in this example to generate the UPS Section.

Figure 11.2 Generate UPS - Maintain Bid Item Design example



Maintain Bid Item Design

Menu | TIMS Test11 | Logout

Save | Undo Changes | Create | Delete | Generate Excel | << | < | Record 1 of 1 | > | >>

Bid Item ID : TBI0000812   << | < | Version 1 of 1 | > | >>

Tender : TND0015876

Design Description : Overlay Hwy 11:16 10 km E of 815 to Hwy 12

UPS Design : Single UPS   Bid Item Covers Mobilization, Site Occ, etc for all Work Activities

Work Activity : WAC0066828 11:16 10 Km E of Hwy 815 - Hwy 12 (11:16 C1 9.900 - 38.243)

WA Cost Estimate : $10,469,622.20 C Level

Status : Completed   Created By : TIMS Test11   Create Date : 08-Sep-2014

Bid Items | History

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	1,061,600.00	$1,061,600.00
20	MISCELLANEOUS - Miscellaneous	X004	Site Occupancy	day	50.00	1,500.00	$0.00
30	AGGREGATES - Aggregates	A800	Supply of Aggregate - With Option	tonne	232,250.00	1.00	$232,250.00
40	BASE - Base	B100	Subgrade Excavation	cubic metre	500.00	12.91	$6,455.00
50	BASE - Base	B152	Granular Fill Des. 6 Class 80	tonne	11,300.00	11.45	$129,385.00
60	BASE - Base	B282	Granular Base Course Des. 2 Class 25	tonne	2,800.00	17.40	$48,720.00
70	DRAINAGE - Drainage	D105	Culverts - Remove and Dispose (C.S.P.) (over 700 mm dia.)	metre	2.00	1,500.00	$3,000.00
80	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	5.00	675.00	$3,375.00
90	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	metre	1,550.00	4.50	$6,975.00
100	GRADING - Grading	G014	Pre-Overlay Benching	kilometre	1.00	120,000.00	$120,000.00
110	GRADING - Grading	G018	Intersection Improvement - IN. 1186A (CIS UPS Seq:11)	Lump Sum	1.00	97,500.00	$97,500.00

Figure 11.3 below shows the result of generating the UPS Sections. The Bid Items tab on the Maintain Bid Item Design screen generated a UPS Section. When Alternative Tender Bid Items are involved, a separate section (A, B, C, etc) is generated for each tab.

Figure 11.3 Maintain Tender screen – UPS Generated from Bid Items

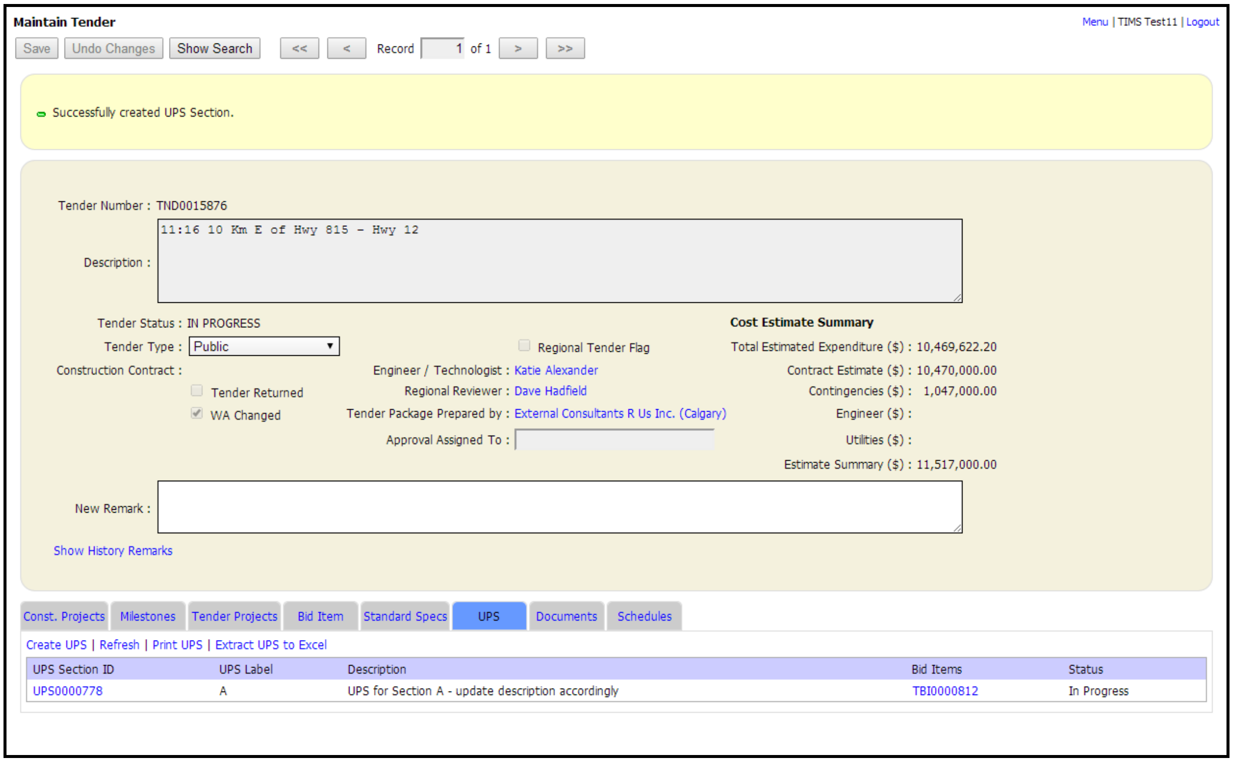
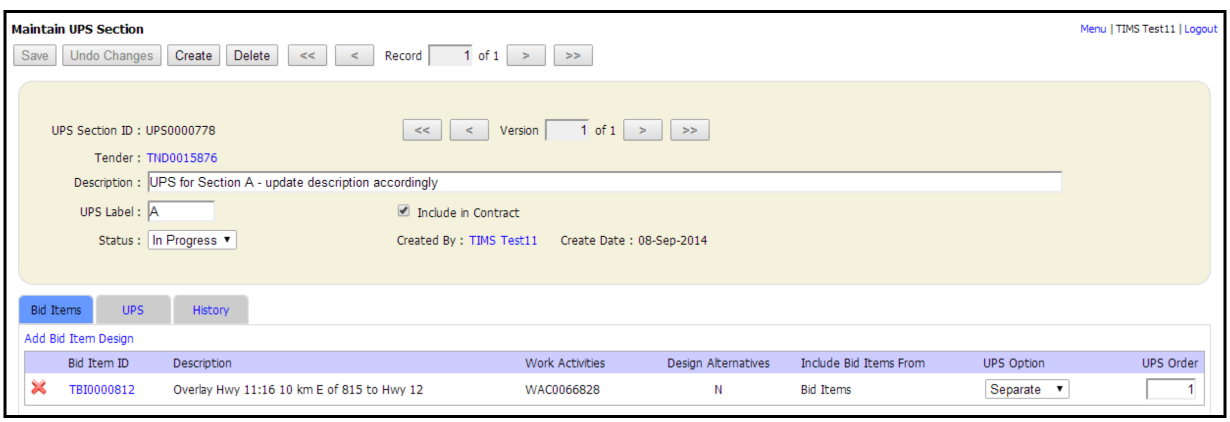


Figure 11.4 Maintain UPS Section screen – UPS Generated from Bid Items



Alert! Notice the wording generated in the UPS' Description. External consultants will need to edit the description appropriately.

Create UPS Section

Using the Create UPS link on the UPS tab allows the Consultant/ Project Administrator to manually create a UPS Section. The user can manually enter the Description and UPS Label they want.

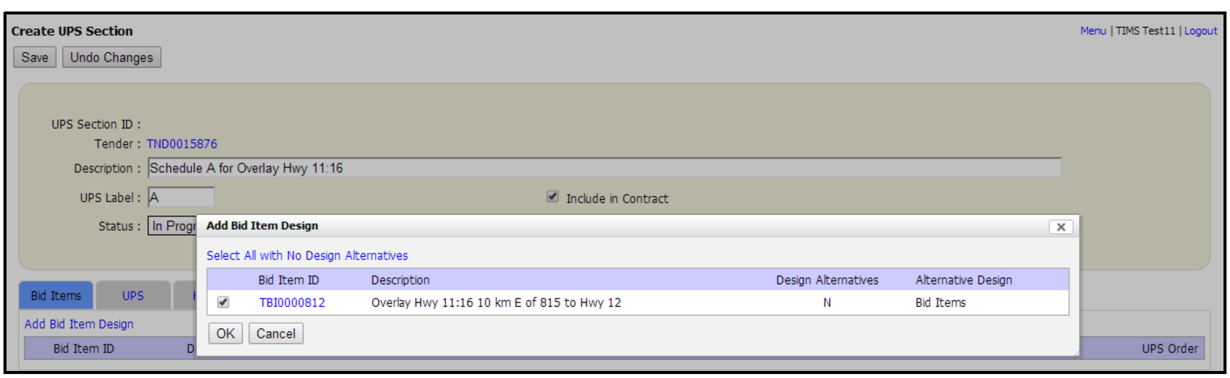
Alert!	The Bid Items listed on the UPS tab (for all UPS Sections) MUST match section 2.2 of the Tender Document submitted by the Consultant. If the Bid Items, their order and/or the quantities for each do not match, expect the Tender to be returned for correction.

Figure 11.5 Create UPS Section screen – blank example

Bid Item Tab

The Add Bid Item Design link provides a list of the Tender Bid Items that were created on the Bid Item tab. Check the Bid Items required. They will be listed in Tender Bid Item ID sequence.

Figure 11.6 Create UPS Section screen – Add Bid Items window



The Bid Item tab must have a value in the UPS Order field before the UPS Section can be saved. In Figure 11.7 below even though there is only one Tender Bid Item, the UPS Order still needs to be manually completed.

Figure 11.7 Create UPS Section screen – UPS Order error

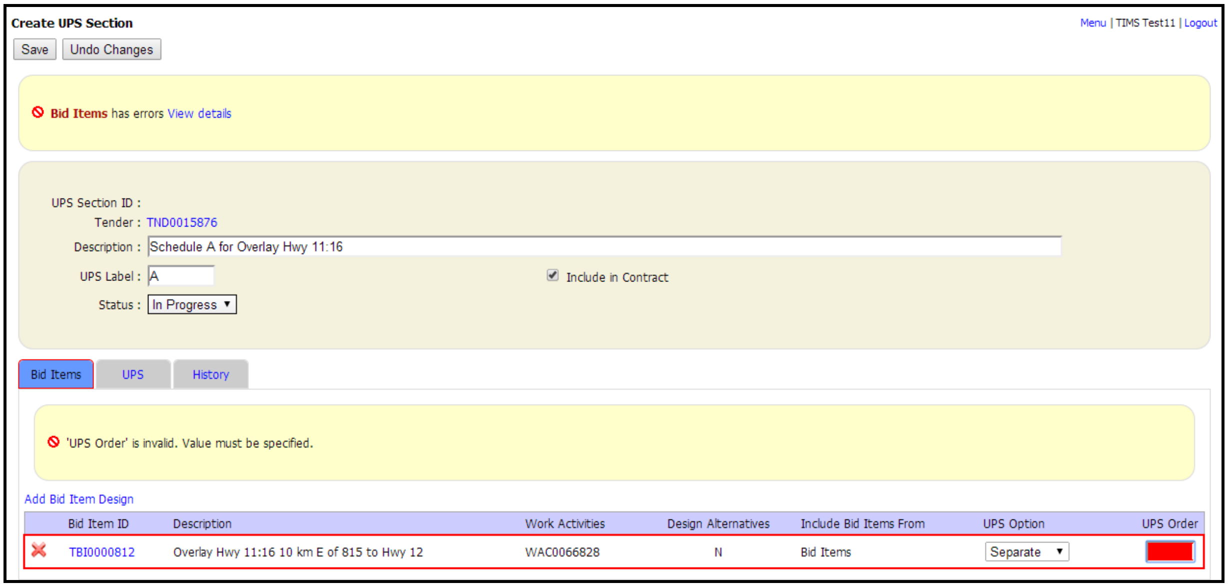
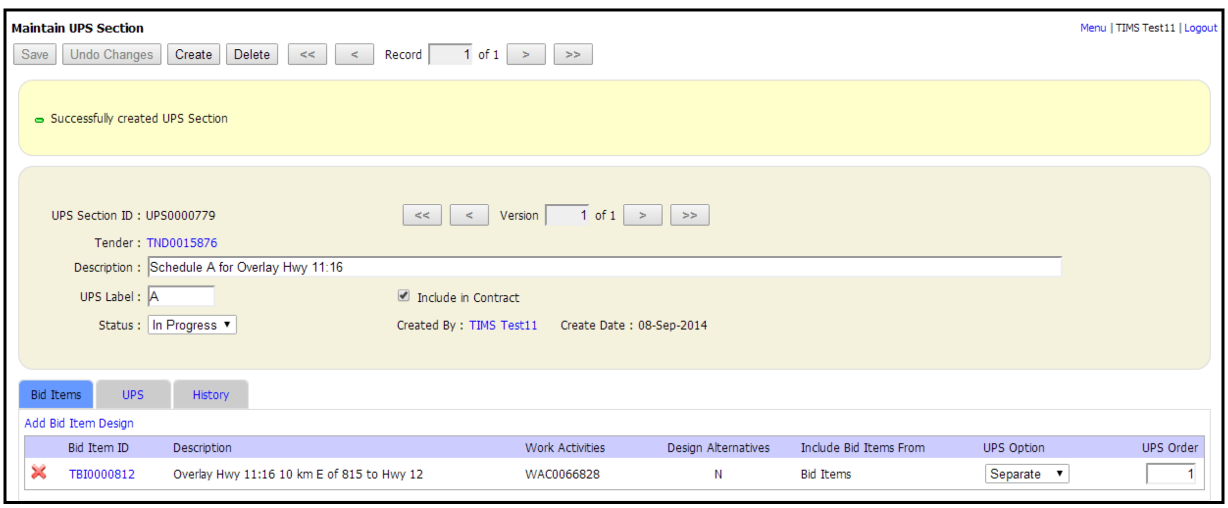


Figure 11.8 Create UPS Section screen – Tender Bid Item Saved



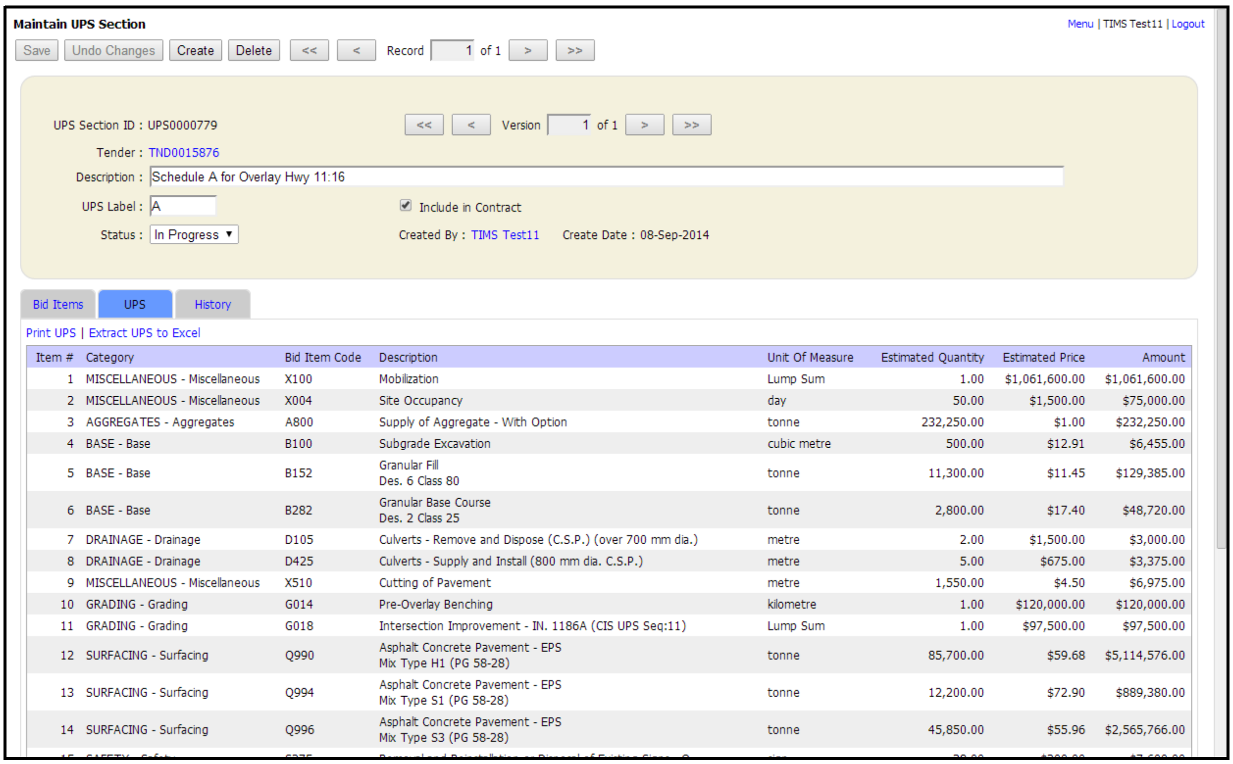
Alert! To remove a Tender Bid Item after the UPS Section has been saved; select the Remove button. Removing the UPS Order value does nothing.

UPS Tab

The UPS tab displays the results of the work done on the Bid Items tab. The individual Bid Items are listed in the order they will appear within the UPS Section. Figure 11.9 below shows how the Tender Bid Item was built.

Alert!	The order of the Bid Items on the UPS tab is the order that Bid Items will be listed on the Bidder tab used by Tender Administration when entering Bids, and the order they will appear in the Tender Document.

Figure 11.9 Create UPS Section screen – UPS tab



Maintain UPS Section

Menu | TIMS Test11 | Logout

Save | Undo Changes | Create | Delete | << | < | Record 1 of 1 | > | >>

UPS Section ID : UPS0000779 | << | < | Version 1 of 1 | > | >>

Tender : TND0015876

Description : Schedule A for Overlay Hwy 11:16

UPS Label : A | Include in Contract

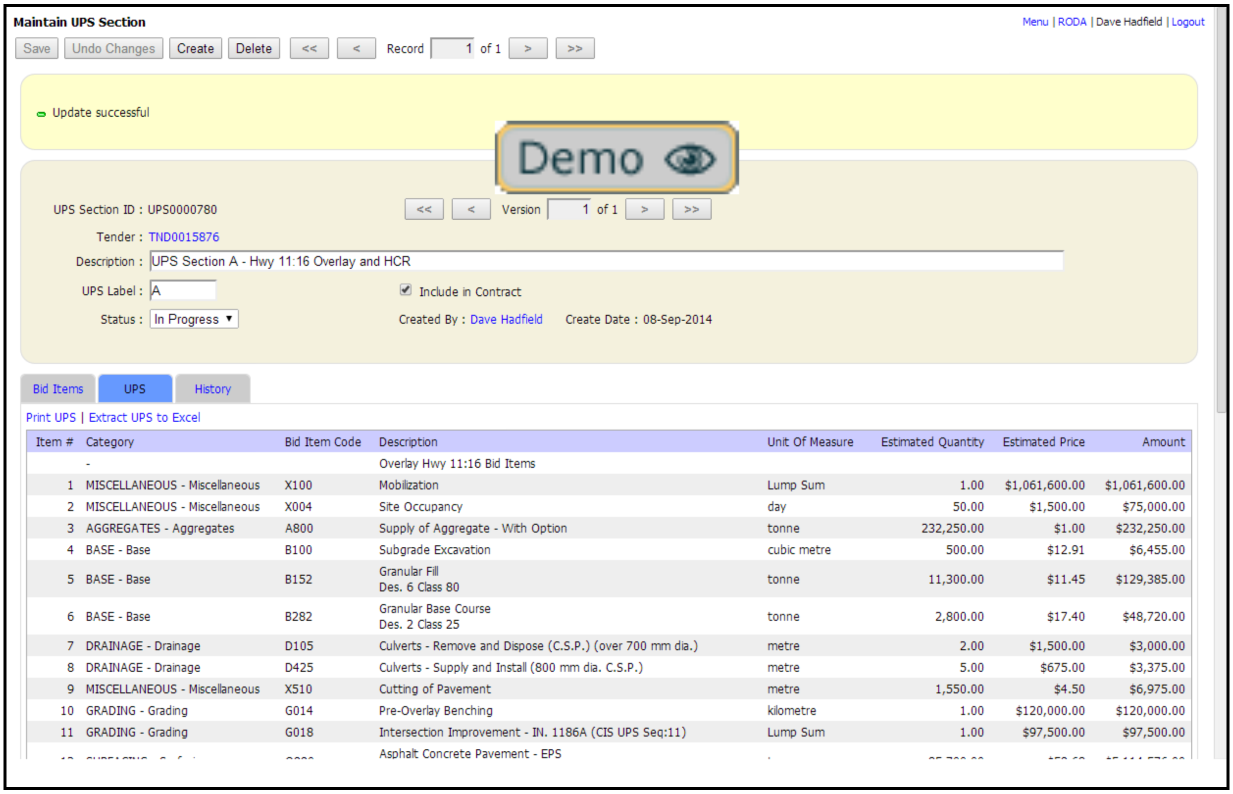
Status : In Progress | Created By : TIMS Test11 | Create Date : 08-Sep-2014

Bid Items | UPS | History

Print UPS | Extract UPS to Excel

Item #	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
1	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	$1,061,600.00	$1,061,600.00
2	MISCELLANEOUS - Miscellaneous	X004	Site Occupancy	day	50.00	$1,500.00	$75,000.00
3	AGGREGATES - Aggregates	A800	Supply of Aggregate - With Option	tonne	232,250.00	$1.00	$232,250.00
4	BASE - Base	B100	Subgrade Excavation	cubic metre	500.00	$12.91	$6,455.00
5	BASE - Base	B152	Granular Fill Des. 6 Class 80	tonne	11,300.00	$11.45	$129,385.00
6	BASE - Base	B282	Granular Base Course Des. 2 Class 25	tonne	2,800.00	$17.40	$48,720.00
7	DRAINAGE - Drainage	D105	Culverts - Remove and Dispose (C.S.P.) (over 700 mm dia.)	metre	2.00	$1,500.00	$3,000.00
8	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	5.00	$675.00	$3,375.00
9	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	metre	1,550.00	$4.50	$6,975.00
10	GRADING - Grading	G014	Pre-Overlay Benching	kilometre	1.00	$120,000.00	$120,000.00
11	GRADING - Grading	G018	Intersection Improvement - IN. 1186A (CIS UPS Seq:11)	Lump Sum	1.00	$97,500.00	$97,500.00
12	SURFACING - Surfacing	Q990	Asphalt Concrete Pavement - EPS Mix Type H1 (PG 58-28)	tonne	85,700.00	$59.68	$5,114,576.00
13	SURFACING - Surfacing	Q994	Asphalt Concrete Pavement - EPS Mix Type S1 (PG 58-28)	tonne	12,200.00	$72.90	$889,380.00
14	SURFACING - Surfacing	Q996	Asphalt Concrete Pavement - EPS Mix Type S3 (PG 58-28)	tonne	45,850.00	$55.96	$2,565,766.00

Demo 11.1 Create a Simple UPS Section



Item #	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
	-		Overlay Hwy 11:16 Bid Items				
1	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	$1,061,600.00	$1,061,600.00
2	MISCELLANEOUS - Miscellaneous	X004	Site Occupancy	day	50.00	$1,500.00	$75,000.00
3	AGGREGATES - Aggregates	A800	Supply of Aggregate - With Option	tonne	232,250.00	$1.00	$232,250.00
4	BASE - Base	B100	Subgrade Excavation	cubic metre	500.00	$12.91	$6,455.00
5	BASE - Base	B152	Granular Fill Des. 6 Class 80	tonne	11,300.00	$11.45	$129,385.00
6	BASE - Base	B282	Granular Base Course Des. 2 Class 25	tonne	2,800.00	$17.40	$48,720.00
7	DRAINAGE - Drainage	D105	Culverts - Remove and Dispose (C.S.P.) (over 700 mm dia.)	metre	2.00	$1,500.00	$3,000.00
8	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	5.00	$675.00	$3,375.00
9	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	metre	1,550.00	$4.50	$6,975.00
10	GRADING - Grading	G014	Pre-Overlay Benching	kilometre	1.00	$120,000.00	$120,000.00
11	GRADING - Grading	G018	Intersection Improvement - IN. 1186A (CIS UPS Seq:11)	Lump Sum	1.00	$97,500.00	$97,500.00
			Asphalt Concrete Pavement - EPS				

How To

1. From the *Maintain Tender* screen in the *UPS* tab, select the **Create UPS** link.
2. From the *Create UPS Section* screen enter text in the **Description** field.
3. Enter a **UPS Label** value (A, B, C, etc)
4. From the *Bid Items* tab select the **Add Bid Item Design** link.
5. From the *Add Bid Items* window check all required **Tender Bid Items** from the list and select the **OK** button.
6. From the *Bid Items* tab select the required **UPS Option** (Separate/ Merge) for each Tender Bid Item.
7. Enter a number in the **UPS Order** fields to sequence the Tender Bid Items appropriately.
8. From the *Create UPS Section* screen select the **Save** button.
9. Select the *UPS* tab to view the results.

Hint:	When the UPS Section does not have a status of In Progress or the version being displayed is not the most current (including any addendum to the Tender), the fields on the Maintain UPS Section screen will be view only.

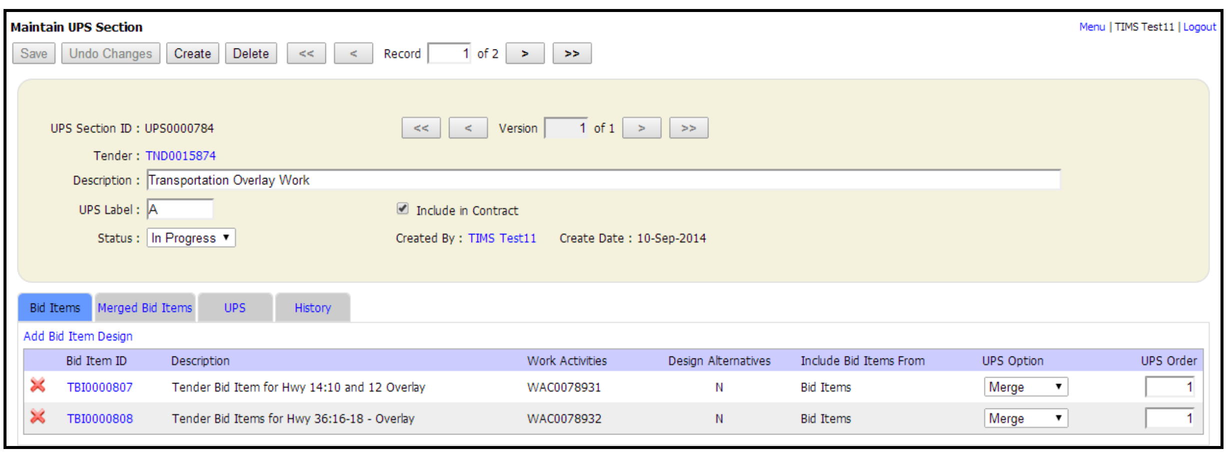
Hint:	Once the Tender includes Bids that have UPS Section Bid Item Prices, the fields on the Maintain UPS Section screen will be view only.

Merge UPS Sections

Merging allows the user to combine the individual Bid Items from two or more Tender Bid Items into one list. When the same Bid Items are listed on two or more Tender Bid Items, they are merged together and appear only once in the Merged Bid Items tab and the UPS tab. The Quantities for these common Bid Items are totaled. If Prices for common Bid Items vary: an error message will display at the time the UPS' status is set to Completed. Updates will need to be made on the Maintain Bid Item Design screen so that the Price for the same Bid Item, is the same across all Tender Bid Items it appears in. In the example below, the second and third Tender Bid Items (TBI0000007, TBI0000016) are be merged. In this UPS Section the merged Bid Items will come after the Bid Items in the first Tender Bid Item (TBI0000003).

Alert!	Bid Items that have Supplementary Descriptions must match exactly. If the Bid Item Code is the same but the Description is not, the Bid Items will not be merged.

Figure 11.10 Maintain UPS Section screen – Bid Items UPS Option & Order



Alert!	All Tender Bid Items being merged, MUST have the same UPS Order number.

Figure 11.11 Maintain Bid Item Design screen – TBI0000007 example

Bid Items | History

Add Bid Item(s) Add Textual Row Add Blank Row

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	DRAINAGE - Drainage	D555	Riprap - Random - Supply and Place	Cubic Metre	10.00	120.65	$1,206.50
20	BRIDGES - Bridges	F915	Supply and Delivery of Deck Joint Assemblies	Lump Sum	1.00	22,301.99	$22,301.99
30	BRIDGES - Bridges	F974	Deck Waterproofing	Square Metre	1,250.00	1.35	$1,687.50
40	BRIDGES - Bridges	F978	Asphalt Concrete Pavement - Mix Type H1 (150-200A)	Tonne	323.00	29.99	$9,686.77
						Total	$34,882.76

Figure 11.12 Maintain Bid Item Design screen – TBI0000016 example

Bid Items | History

Add Bid Item(s) Add Textual Row Add Blank Row

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	DRAINAGE - Drainage	D555	Riprap - Random - Supply and Place	Cubic Metre	123.00	120.65	$14,839.95
20	BRIDGES - Bridges	F915	Supply and Delivery of Deck Joint Assemblies	Lump Sum	1.00	22,301.99	$22,301.99
30	BRIDGES - Bridges	F920	Installation of Deck Joint Assemblies	Lump Sum	1.00	3,599.98	$3,599.98
40	BRIDGES - Bridges	F974	Deck Waterproofing	Square Metre	1,150.00	1.35	$1,552.50
50	BRIDGES - Bridges	F979	Asphalt Concrete Pavement - Mix Type H1 (150-200A)	Lump Sum	1.00	9,565.00	$9,565.00
						Total	$51,859.42

Referencing the examples above you can see how Bid Items common to both of the merged Tender Bid Items (TBI0000007, TBI0000016) have been combined and the Quantities added together in Figure 11.13 below.

Figure 11.13 Maintain UPS Section screen – Merged Bid Items

Maintain UPS Section

Menu | RODA | Dave Hadfield | Logout

Save | Undo Changes | Create | Delete | << | < | Record 1 of 3 | > | >>

UPS Section ID : UPS0000002 | << | < | Version 1 of 1 | > | >>

Tender : TND0015324

Description : UPS for Section A - update description accordingly

UPS Label : A | Include in Contract

Status : In Progress | Created By : Dave Hadfield | Create Date : 25-Nov-2013

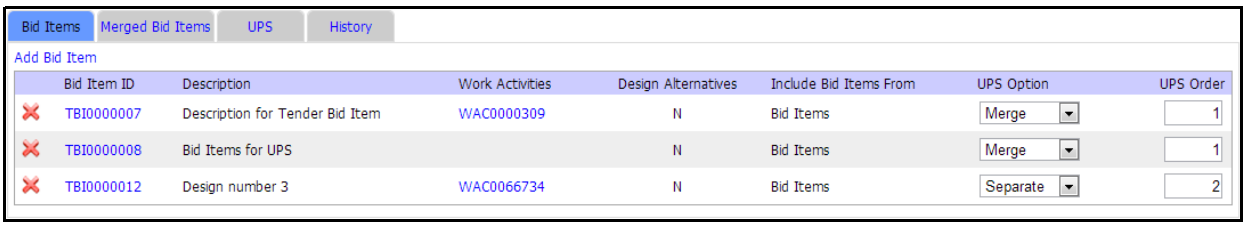
Bid Items | Merged Bid Items | UPS | History

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	DRAINAGE - Drainage	D555	Riprap - Random - Supply and Place	Cubic Metre	133.00	$120.65	$16,046.45
20	BRIDGES - Bridges	F915	Supply and Delivery of Deck Joint Assemblies	Lump Sum	2.00	$22,301.99	$44,603.98
30	BRIDGES - Bridges	F974	Deck Waterproofing	Square Metre	2,400.00	$1.35	$3,240.00
40	BRIDGES - Bridges	F978	Asphalt Concrete Pavement - Mix Type H1 (150-200A)	Tonne	323.00	$29.99	$9,686.77
50	BRIDGES - Bridges	F920	Installation of Deck Joint Assemblies	Lump Sum	1.00	$3,599.98	$3,599.98
60	BRIDGES - Bridges	F979	Asphalt Concrete Pavement - Mix Type H1 (150-200A)	Lump Sum	1.00	$9,565.00	$9,565.00

Merging Tender Bid Items

Merging Tender Bid Items begins on the Bid Items tab of the Maintain UPS Section screen. The UPS Option for at least two Bid Item Designs is set to Merge. The UPS Order for the Merged Tender Bid Items must be the same (i.e. both set to 1). Once the UPS Section is saved, the Merged Bid Items tab is displayed and Bid Items from both Tender Bid Items are loaded onto the tab. The order of the Tender Bid Items on the Bid Items tab, determines the default order of the Bid Items on the Merged Bid Items tab. Figure 11.14 below shows the two Tender Bid Items that are to be merged (TBI0000007 & 8). Figures 11.15 and 11.16 show the Bid Items assigned to each Tender Bid Item. Figure 11.17 on page 11-13 shows the results of the merge.

Figure 11.14 Maintain UPS Section screen – Bid Items tab

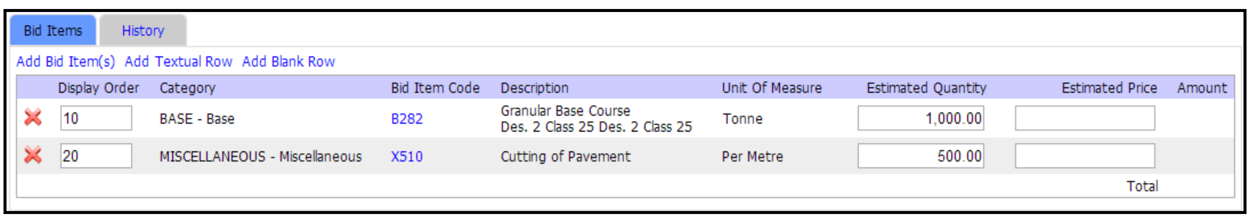


Bid Items | Merged Bid Items | UPS | History

Add Bid Item

	Bid Item ID	Description	Work Activities	Design Alternatives	Include Bid Items From	UPS Option	UPS Order
	TBI0000007	Description for Tender Bid Item	WAC0000309	N	Bid Items	Merge	1
	TBI0000008	Bid Items for UPS		N	Bid Items	Merge	1
	TBI0000012	Design number 3	WAC0066734	N	Bid Items	Separate	2

Figure 11.15 Maintain Bid Item Design screen – Tender Bid Item TBI0000007

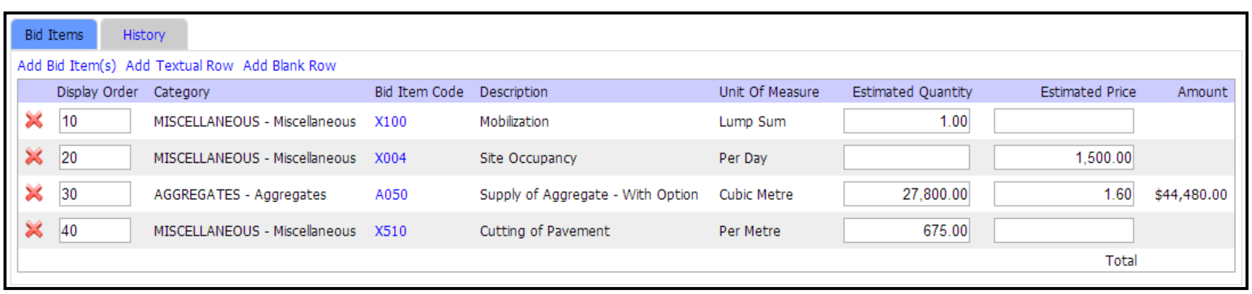


Bid Items | History

Add Bid Item(s) Add Textual Row Add Blank Row

	Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
	10	BASE - Base	B282	Granular Base Course Des. 2 Class 25 Des. 2 Class 25	Tonne	1,000.00		
	20	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	Per Metre	500.00		
							Total	

Figure 11.16 Maintain Bid Item Design screen – Tender Bid Item TBI0000008



Bid Items | History

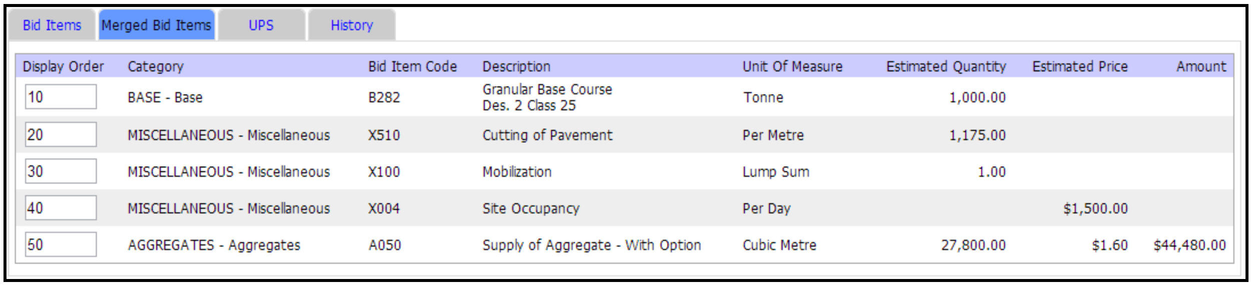
Add Bid Item(s) Add Textual Row Add Blank Row

	Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
	10	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00		
	20	MISCELLANEOUS - Miscellaneous	X004	Site Occupancy	Per Day		1,500.00	
	30	AGGREGATES - Aggregates	A050	Supply of Aggregate - With Option	Cubic Metre	27,800.00	1.60	$44,480.00
	40	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	Per Metre	675.00		
							Total	

In the results below, notice how the Estimated Quantity of Bid Item X510 is the total of the two Tender Bid Items (500.00 + 675.00).

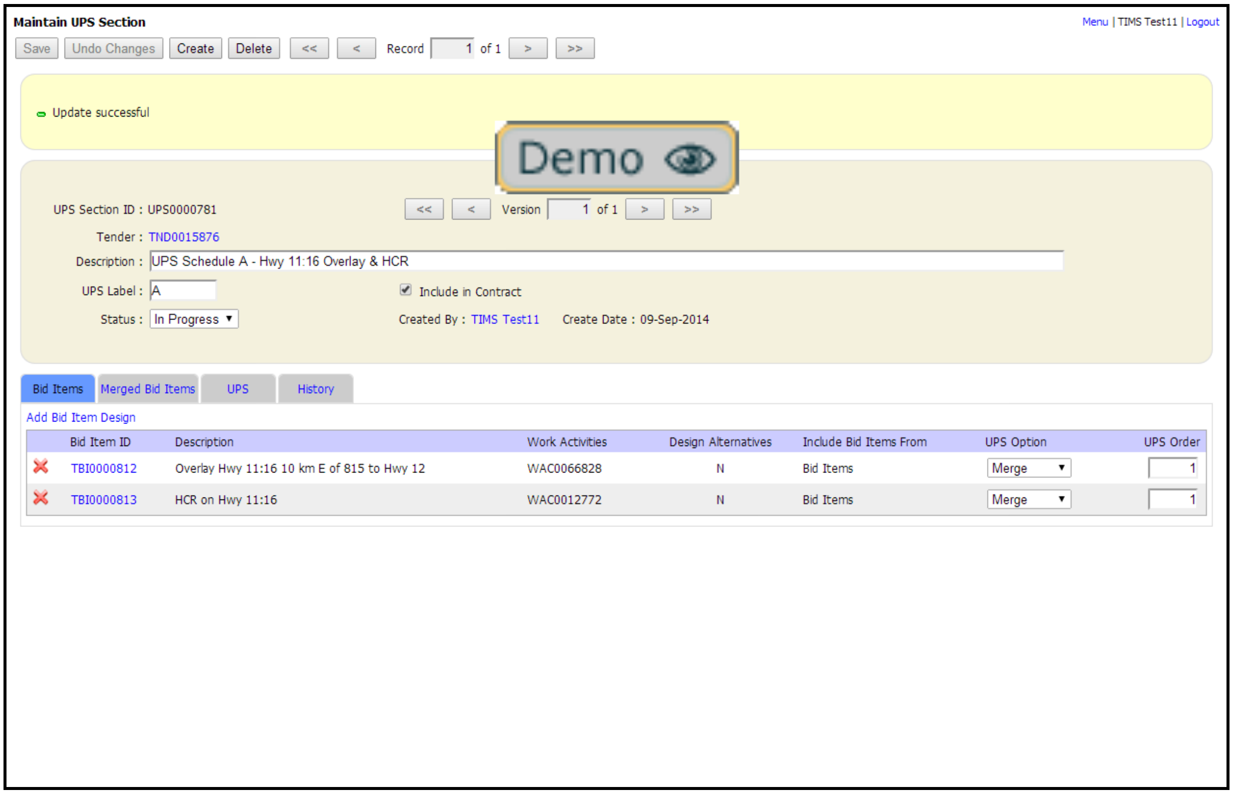
Alert! Prices of common Bid Items cannot be different when the Status of the UPS Section is set to Completed.

Figure 11.17 Maintain UPS Section screen – Merged Bid Items tab



Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	BASE - Base	B282	Granular Base Course Des. 2 Class 25	Tonne	1,000.00		
20	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	Per Metre	1,175.00		
30	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00		
40	MISCELLANEOUS - Miscellaneous	X004	Site Occupancy	Per Day		$1,500.00	
50	AGGREGATES - Aggregates	A050	Supply of Aggregate - With Option	Cubic Metre	27,800.00	$1.60	$44,480.00

Demo 11.2 Create a Merged UPS Section



How To

1. From the *Maintain Tender* screen in the *UPS* tab, select the **Create UPS** link.
2. From the *Create UPS Section* screen enter text in the **Description** field.
3. Enter a **UPS Label** value (A, B, C, etc)
4. From the *Bid Items* tab select the **Add Bid Item Design** link.
5. From the *Add Bid Items* window check all required **Tender Bid Items** from the list and select the **OK** button.
6. From the *Bid Items* tab select the required **UPS Option** (Merge) for each Tender Bid Item.
7. Enter a number in the **UPS Order** fields to sequence the Tender Bid Items appropriately.
8. From the *Create UPS Section* screen select the **Save** button.
9. Select the *Merged Bid Item* tab to view the Bid Items that were merged.
10. Select the *UPS* tab to view the complete list of Bid Items.

Merging Tender Bid Items Errors

Merging Tender Bid Items must follow a few rules. There must be at least two Tender Bid Items with a UPS Option set to Merge (you can't merge one Tender Bid Item with itself). Tender Bid Items that are to be merged, need to have the same UPS Order number. PMA allows multiple merges. Understand that more than two Tender Bid Items can be merged together. All merged Tender Bid Items must have the same UPS Order number.

Figure 11.18 Maintain UPS Section screen – UPS Option error

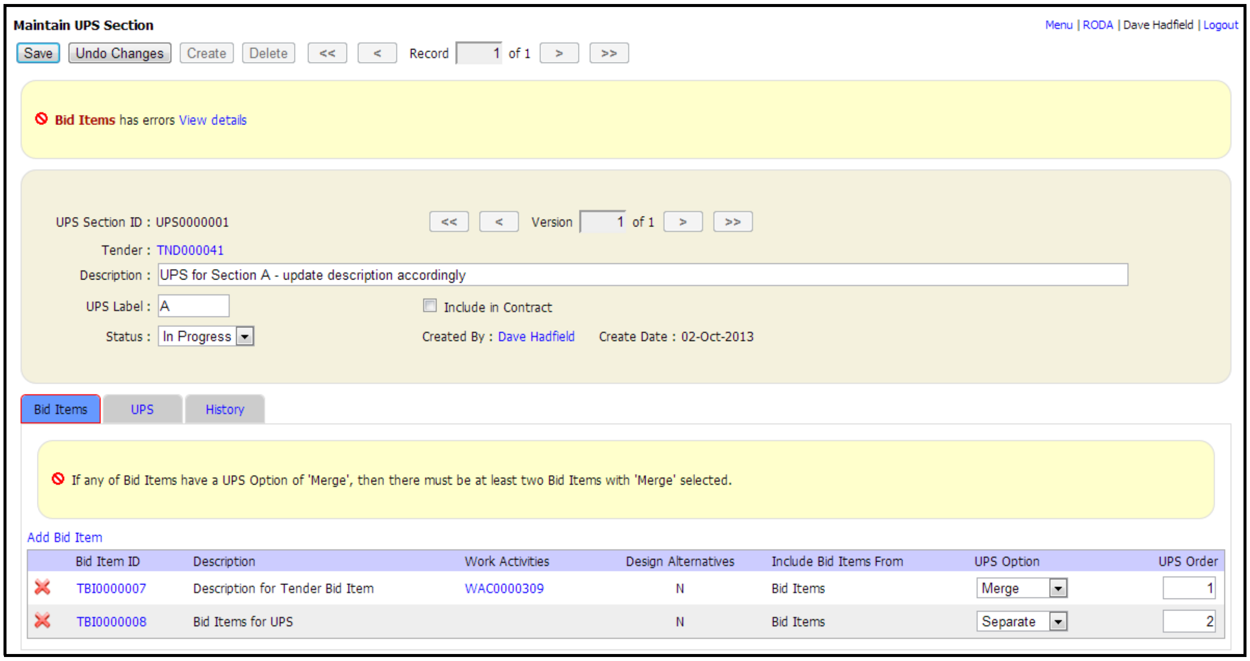
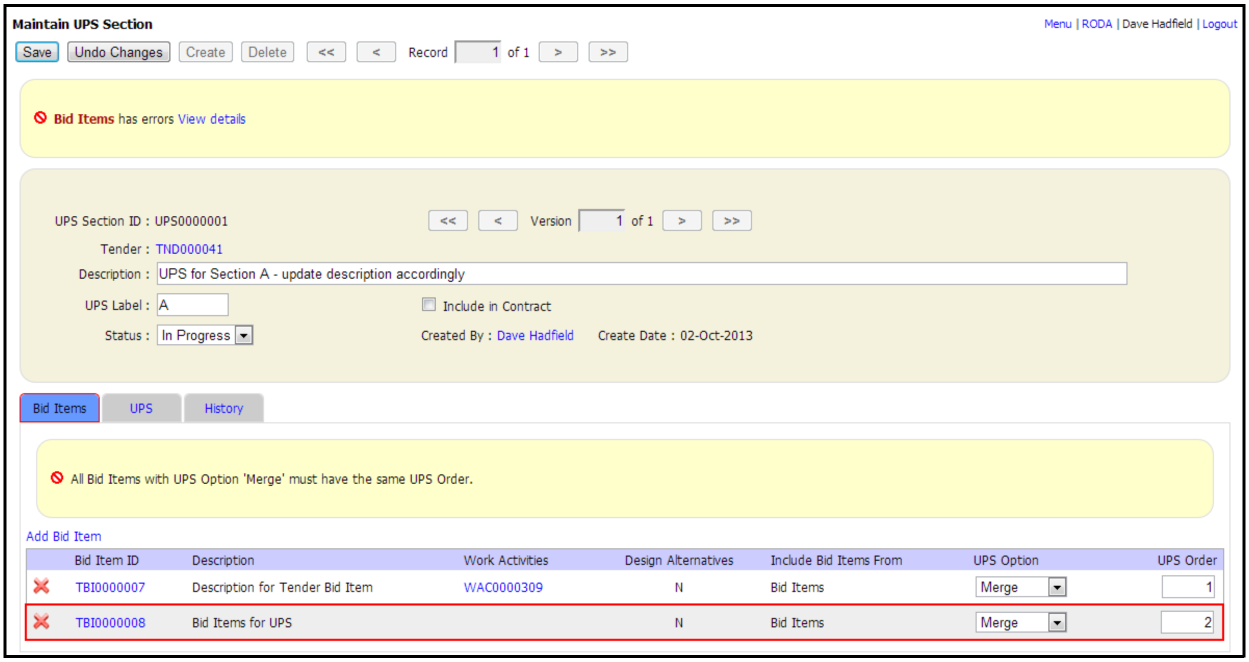
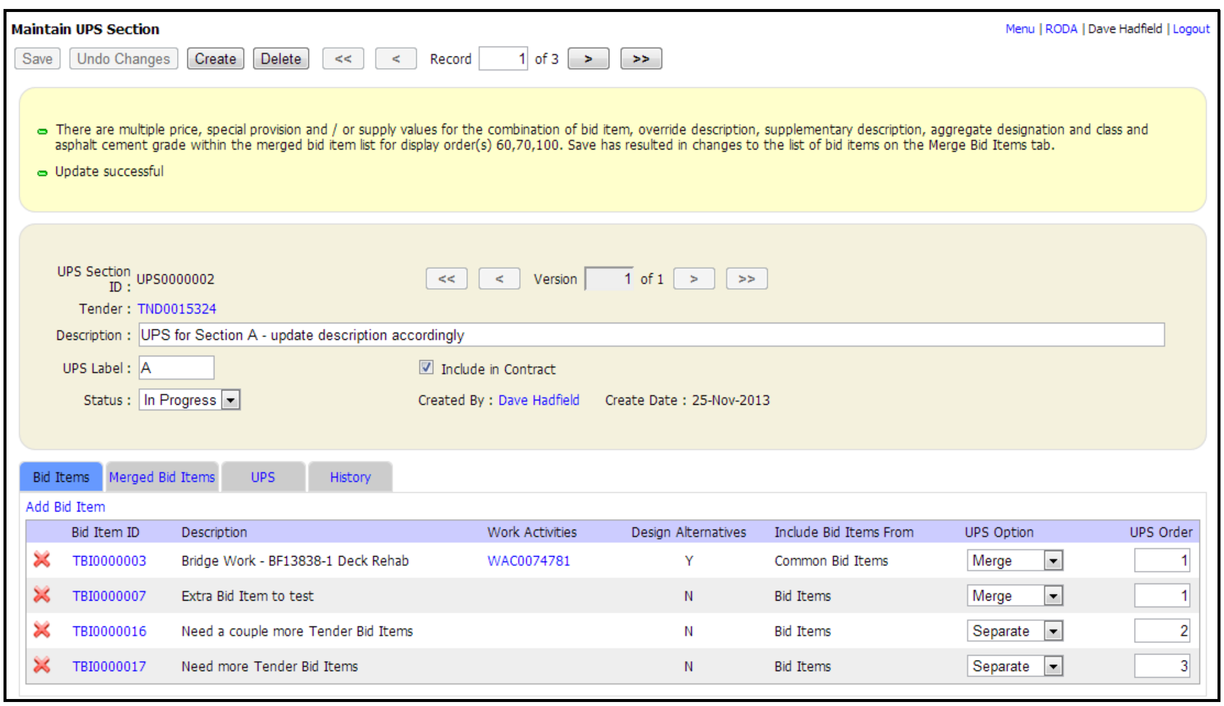


Figure 11.19 Maintain UPS Section screen – UPS Order error



Alert! All duplicate Bid Items that are merged, must have the same Price before the UPS Section can be Completed. Quantities are totaled.

Figure 11.20 Maintain UPS Section screen – Multiple Price msg

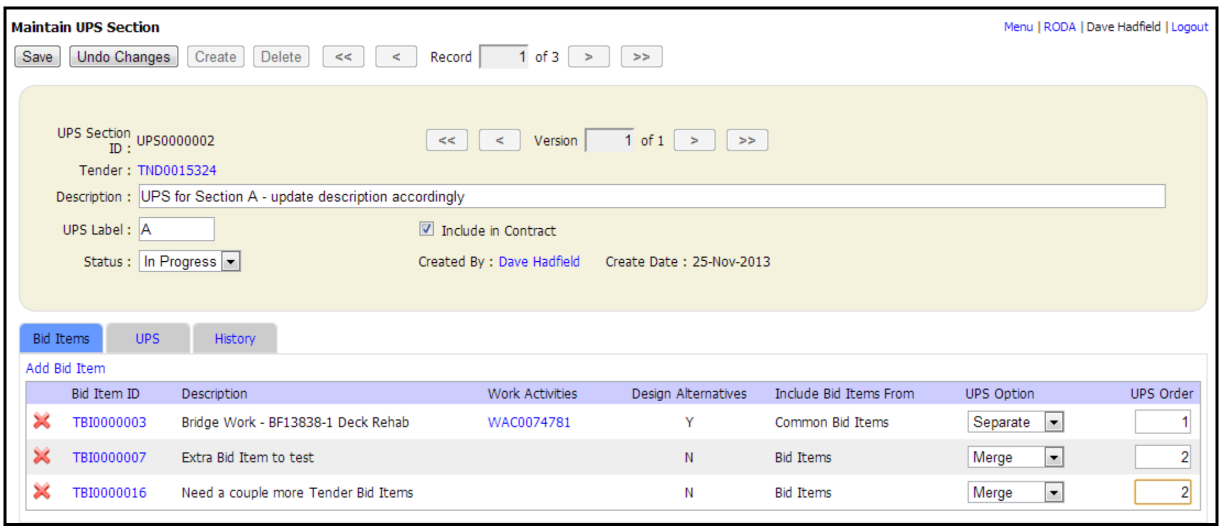


Merging Tender Bid Items and Include in Contract

The Include in Contract check box is selected by default. If the UPS created contains multiple Tender Bid Items and if any of those Tender Bid Items do not reference a Work Activity or Job Coster, you will not be able to successfully set the status of the UPS to Completed.

Although the example below worked to illustrate how Merging works (UPS Option and UPS Order), the Status cannot be set to Completed with this arrangement. The Include in Contract check box is selected by default. If the UPS section contains multiple Tender Bid Items, and if any of those Tender Bid Items do not reference a Work Activity or Job Coster, you will not be able to successfully set the status of the UPS to Completed.

Figure 11.21 Maintain UPS Section screen – UPS Option & Order example



In order for PMA to automatically add the Bid Items from the Tender onto the Contract, they must reference a Work Activity. Figure 11.22 below shows the error message that will appear. The next figure provides an example of the Bid Items tab on a Contract. You can see that a Work Activity or Job Coster is always included.

Figure 11.22 Maintain UPS Section screen – Include in Contract error

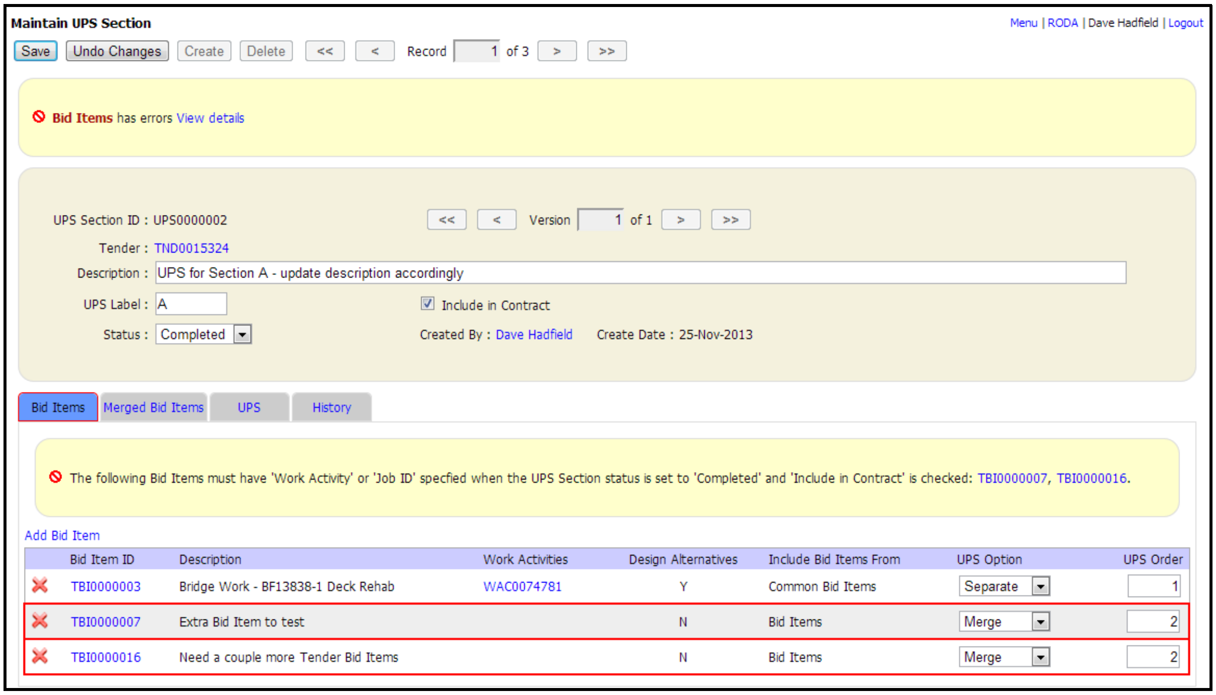
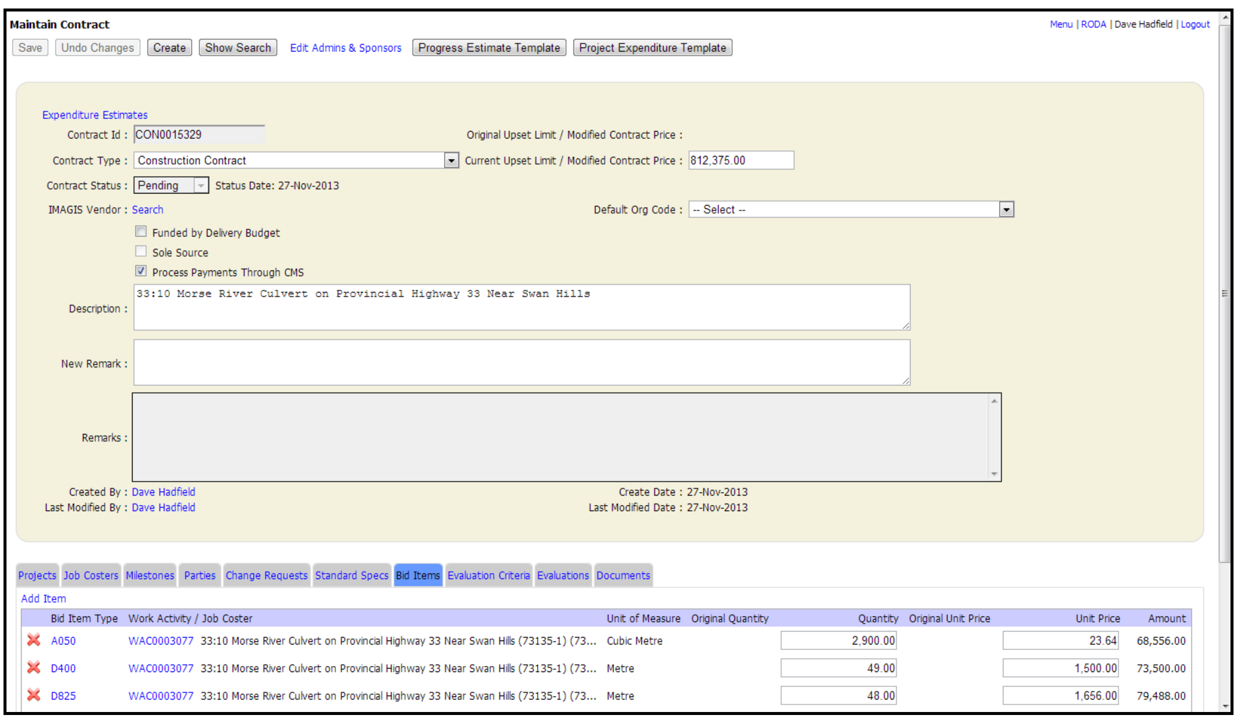


Figure 11.23 Maintain Contract screen – Bid Items tab



Create UPS Sections from Alternative Tender Bid Items

If Tender Bid Items were created with Alternatives, PMA Delivery recognizes this and offers more options for the UPS Section. As Tender Bid Items are selected, the Alternative must also be considered. When alternatives are involved, one UPS Section is required for each Alternative.

Figure 11.24 Maintain UPS Section screen – Add Bid Items window

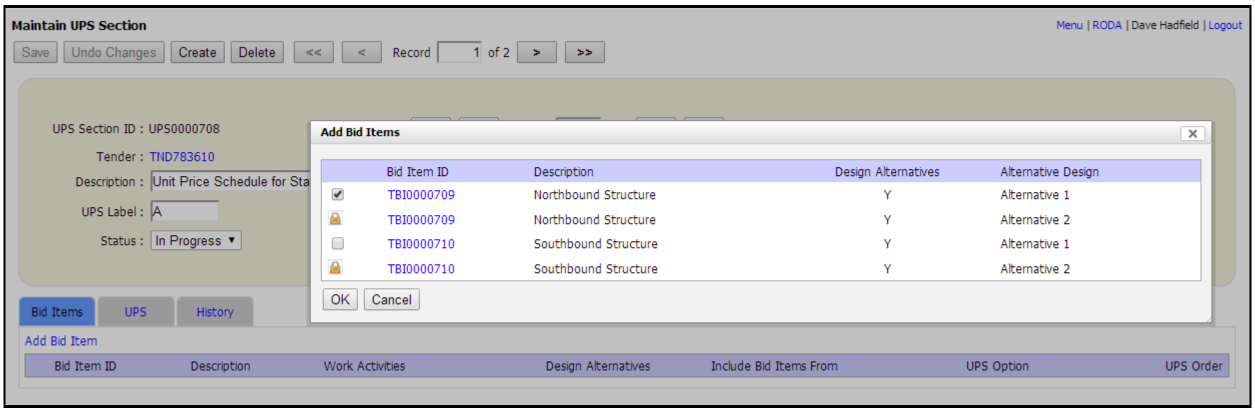
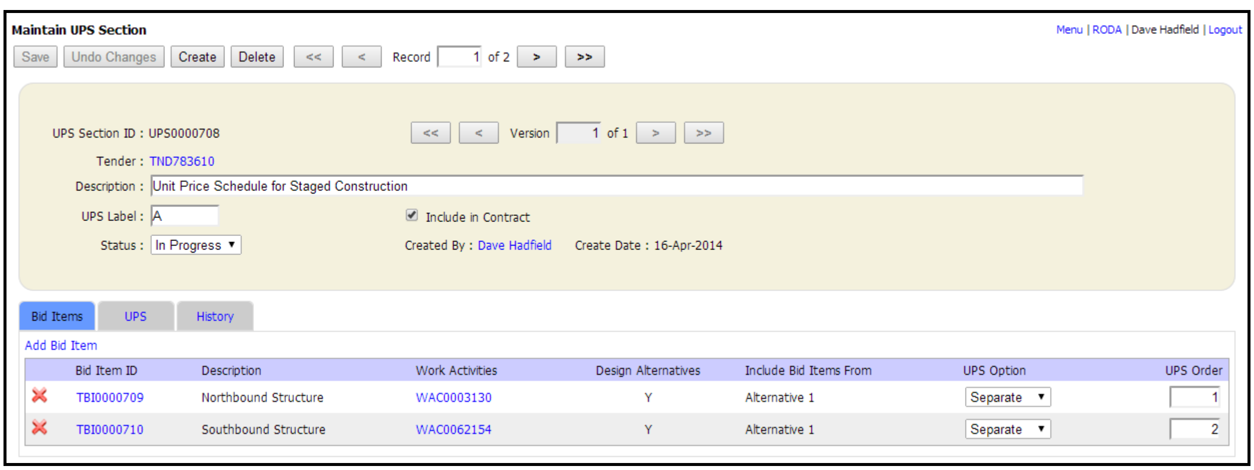
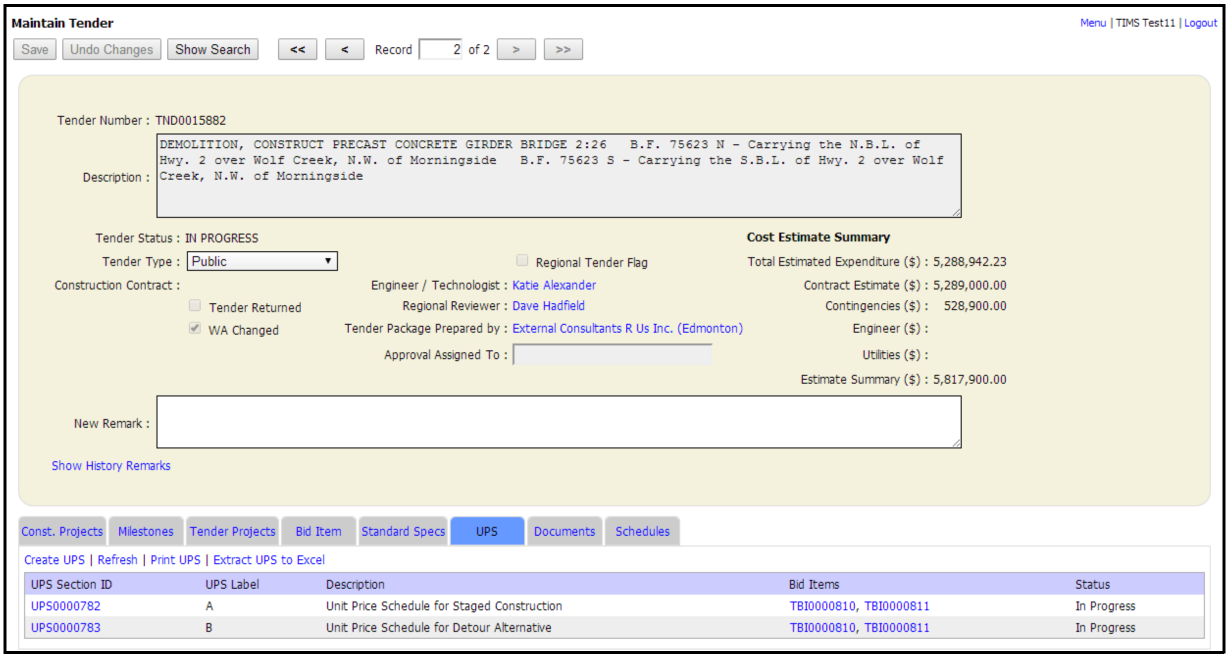


Figure 11.25 Maintain UPS Section screen – Bid Items with Alternatives

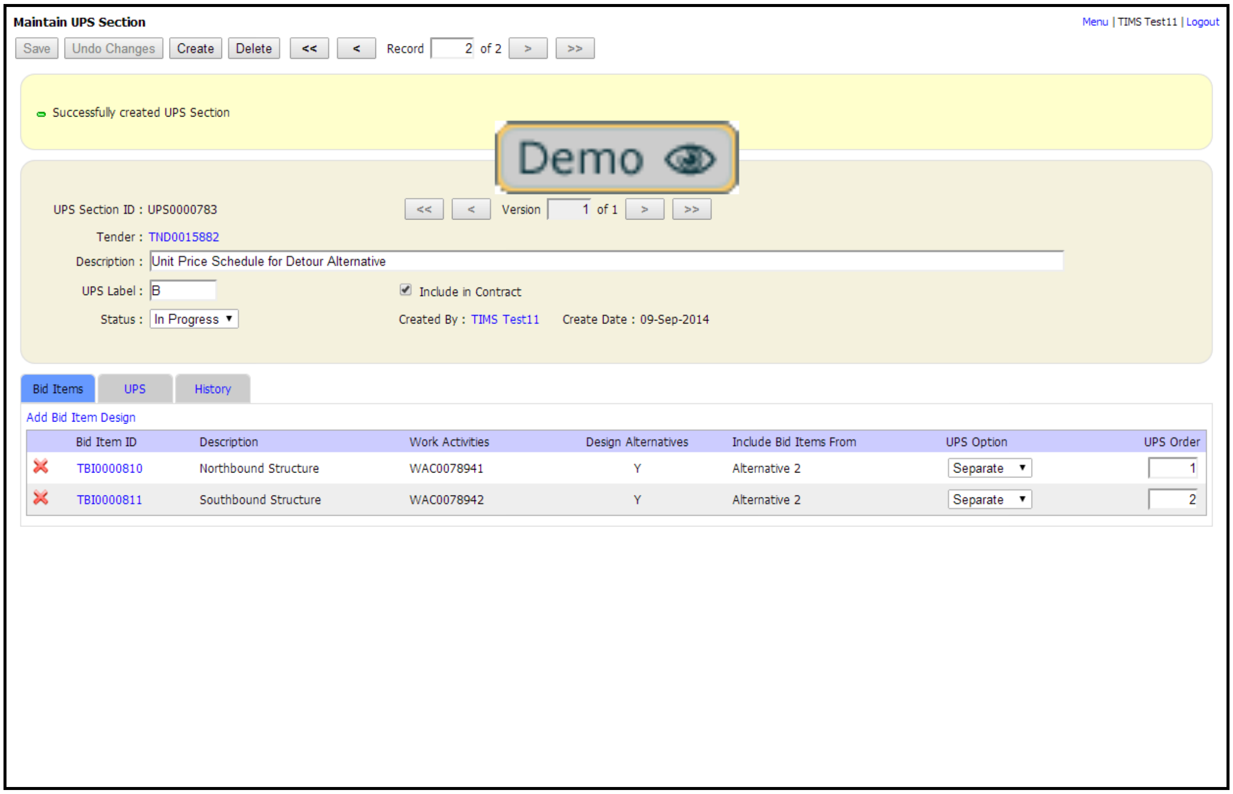


Alert! You cannot enter more than one Alternative from a Tender Bid Item into the same UPS Section. Once an Alternative is selected, the other Alternative(s) for the Tender Bid Item are locked.

Figure 11.26 Maintain Tender screen - UPS tab



Demo 11.3 Create UPS Sections for Tender Bid Items with Alternatives



How To

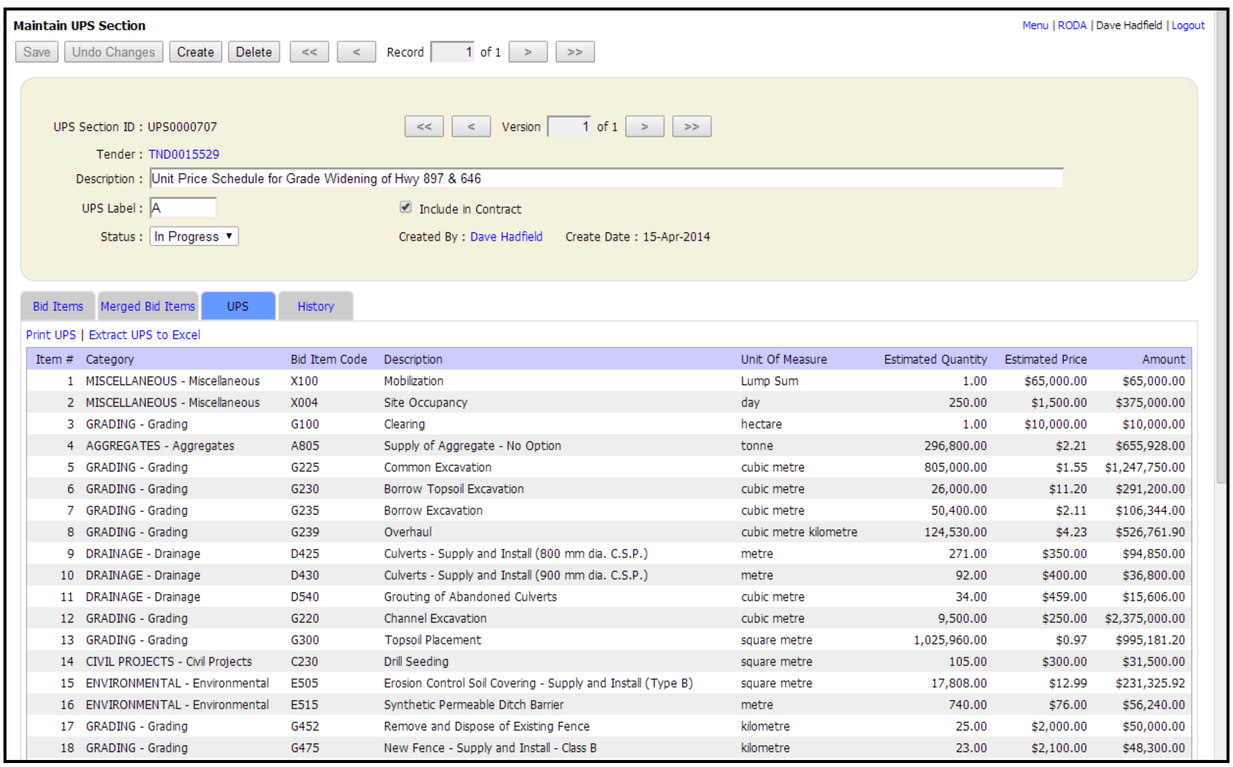
1. From the *Maintain Tender* screen in the *UPS* tab, select the **Create UPS** link.
2. From the *Create UPS Section* screen enter text in the **Description** field.
3. Enter a **UPS Label** value (A, B, C, etc)
4. From the *Bid Items* tab select the **Add Bid Item Design** link.
5. From the *Add Bid Items* window check all required **Tender Bid Item/Alternative #s** from the list and select the **OK** button.
6. From the *Bid Items* tab select the required **UPS Option** (Separate/ Merge) for each Tender Bid Item.
7. Enter a number in the **UPS Order** fields to sequence the Tender Bid Items appropriately.
8. From the *Create UPS Section* screen select the **Save** button.
9. Select the *UPS* tab to view the complete list of Bid Items.
10. Repeat to create a UPS Section for the next Alternative.

Edit UPS Item Numbers

The order of the Items on the UPS tab is the order that Items will appear in the UPS section of the Tender Document. Having these items in the proper order is important. The UPS tab provides a preview of how the UPS section of the Tender Document will look, so it is an opportunity to make any changes necessary. Item Numbers cannot be changed on the UPS tab. However, changes can be made on other screens - that will ultimately set the order of the Items.

- Where the UPS Option is set to Separate:
    - To change the order of Tender Bid Items: use the Maintain UPS Section screen, Bid Items tab, UPS Order value
    - To change the order of individual Bid Items: use the Maintain Bid Item Design screen, Display Order value
- Where the UPS Option is set to Merge:
    - To change the order of individual Bid Items: use the Maintain UPS Section screen, Merged Bid Items tab, Display Order value

Figure 11.27 Maintain UPS Section - UPS tab



Maintain UPS Section

Menu | RODA | Dave Hadfield | Logout

Save | Undo Changes | Create | Delete | << | < | Record 1 of 1 | > | >>

UPS Section ID : UPS0000707

<< | < | Version 1 of 1 | > | >>

Tender : TND0015529

Description : Unit Price Schedule for Grade Widening of Hwy 897 & 646

UPS Label : A

Include in Contract

Status : In Progress

Created By : Dave Hadfield

Create Date : 15-Apr-2014

Bid Items | Merged Bid Items | UPS | History

Print UPS | Extract UPS to Excel

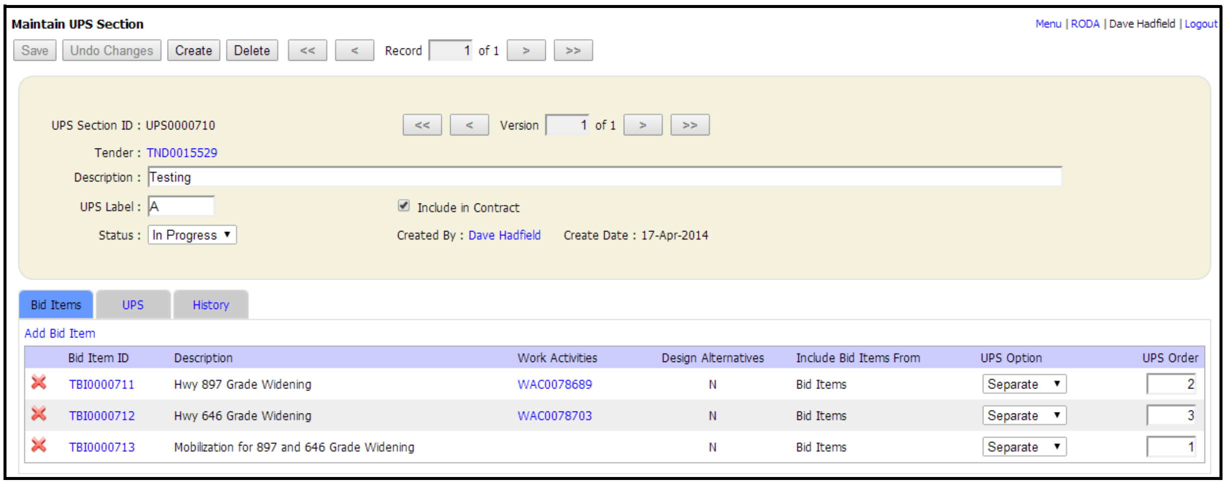
Item #	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
1	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	$65,000.00	$65,000.00
2	MISCELLANEOUS - Miscellaneous	X004	Site Occupancy	day	250.00	$1,500.00	$375,000.00
3	GRADING - Grading	G100	Clearing	hectare	1.00	$10,000.00	$10,000.00
4	AGGREGATES - Aggregates	A805	Supply of Aggregate - No Option	tonne	296,800.00	$2.21	$655,928.00
5	GRADING - Grading	G225	Common Excavation	cubic metre	805,000.00	$1.55	$1,247,750.00
6	GRADING - Grading	G230	Borrow Topsoil Excavation	cubic metre	26,000.00	$11.20	$291,200.00
7	GRADING - Grading	G235	Borrow Excavation	cubic metre	50,400.00	$2.11	$106,344.00
8	GRADING - Grading	G239	Overhaul	cubic metre kilometre	124,530.00	$4.23	$526,761.90
9	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	271.00	$350.00	$94,850.00
10	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	92.00	$400.00	$36,800.00
11	DRAINAGE - Drainage	D540	Grouting of Abandoned Culverts	cubic metre	34.00	$459.00	$15,606.00
12	GRADING - Grading	G220	Channel Excavation	cubic metre	9,500.00	$250.00	$2,375,000.00
13	GRADING - Grading	G300	Topsoil Placement	square metre	1,025,960.00	$0.97	$995,181.20
14	CIVIL PROJECTS - Civil Projects	C230	Drill Seeding	square metre	105.00	$300.00	$31,500.00
15	ENVIRONMENTAL - Environmental	E505	Erosion Control Soil Covering - Supply and Install (Type B)	square metre	17,808.00	$12.99	$231,325.92
16	ENVIRONMENTAL - Environmental	E515	Synthetic Permeable Ditch Barrier	metre	740.00	$76.00	$56,240.00
17	GRADING - Grading	G452	Remove and Dispose of Existing Fence	kilometre	25.00	$2,000.00	$50,000.00
18	GRADING - Grading	G475	New Fence - Supply and Install - Class B	kilometre	23.00	$2,100.00	$48,300.00

Editing Tender Bid Item Display Order Values

If the order of individual Bid Items need to be changed and the Tender Bid Item has a UPS Option of Separate, clicking the Bid Item ID will allow open the Maintain Bid Item Design screen.

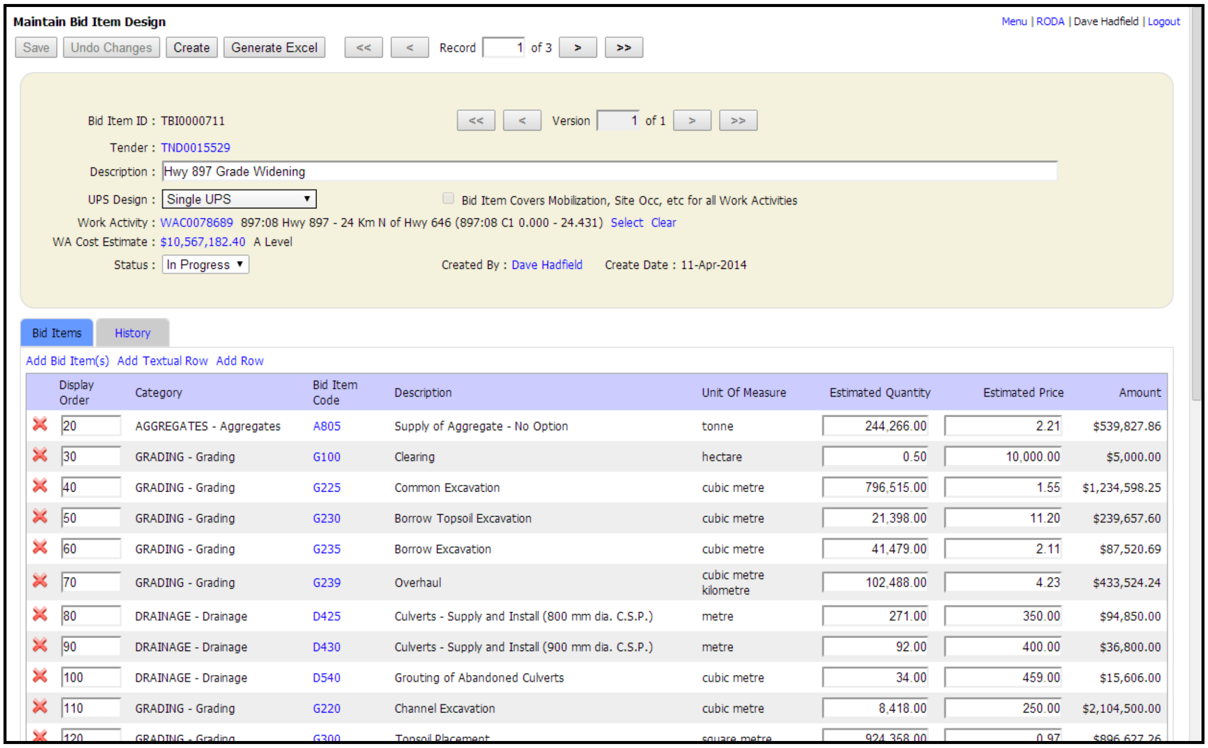
Alert! If a Tender Bid Item has the UPS Option set to Merged; changing the individual Tender Bid Item will have no affect on the order of the UPS Bid Items.

Figure 11.28 Maintain UP Section screen - Bid Item tab



Hint: Click the Bid Item ID to edit the order of the individual Bid Items.

Figure 11.29 Maintain Bid Item Design screen – Original Display Order



Display Order values are purposely set ten digits apart. This allows lots of room to insert new Bid Items or renumber existing Bid Items.

Figure 11.30 Maintain Bid Item Design screen - Edited Display Order

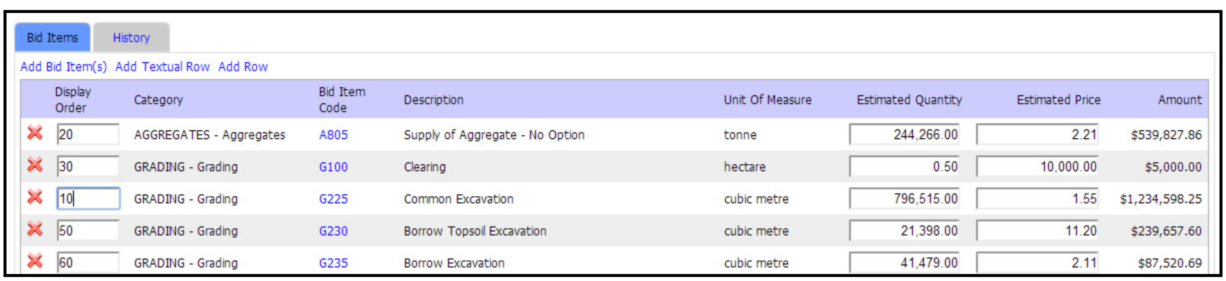
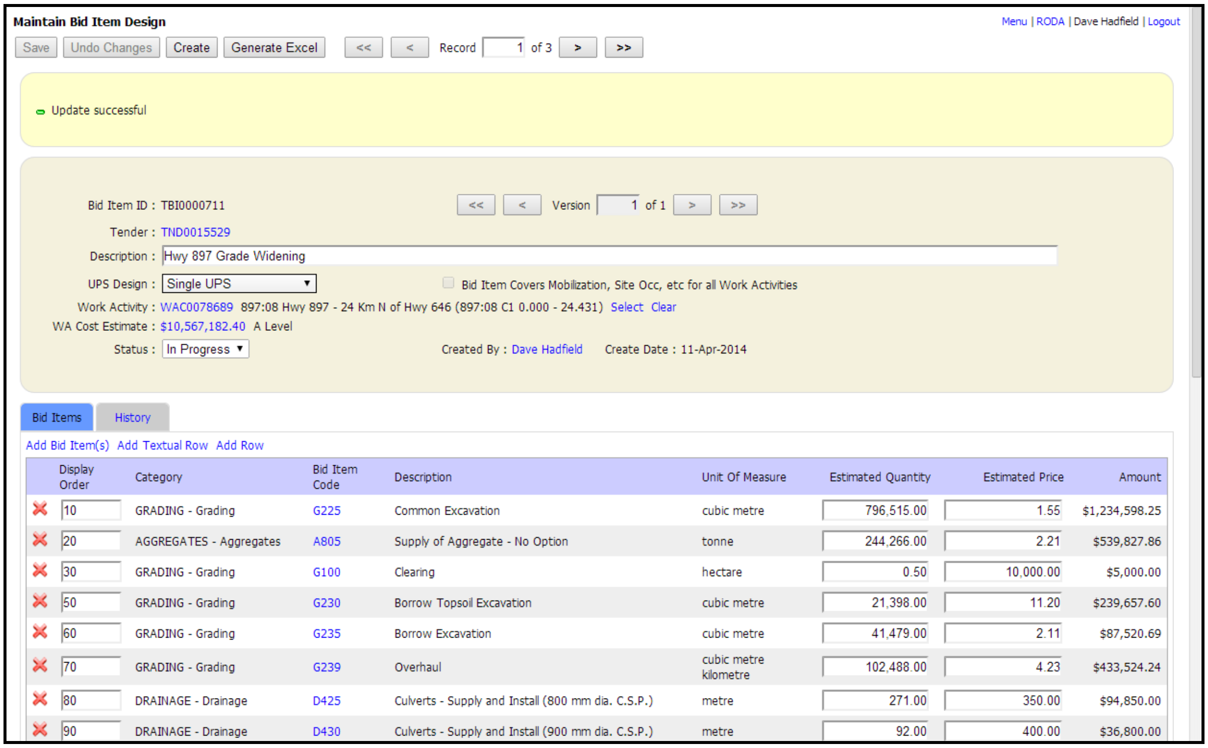


Figure 11.31 Maintain Bid Item Design screen – Saved Display Order



Maintain Bid Item Design

Menu | RODA | Dave Hadfield | Logout

Save | Undo Changes | Create | Generate Excel | << | < | Record 1 of 3 | > | >>

Update successful

Bid Item ID : TBI0000711 | << | < | Version 1 of 1 | > | >>

Tender : TND0015529

Description : Hwy 897 Grade Widening

UPS Design : Single UPS | Bid Item Covers Mobilization, Site Occ, etc for all Work Activities

Work Activity : WAC0078689 897:08 Hwy 897 - 24 Km N of Hwy 646 (897:08 C1 0.000 - 24.431) Select Clear

WA Cost Estimate : $10,567,182.40 A Level

Status : In Progress | Created By : Dave Hadfield | Create Date : 11-Apr-2014

Bid Items | History

Add Bid Item(s) Add Textual Row Add Row

	Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
	10	GRADING - Grading	G225	Common Excavation	cubic metre	796,515.00	1.55	$1,234,598.25
	20	AGGREGATES - Aggregates	A805	Supply of Aggregate - No Option	tonne	244,266.00	2.21	$539,827.86
	30	GRADING - Grading	G100	Clearing	hectare	0.50	10,000.00	$5,000.00
	50	GRADING - Grading	G230	Borrow Topsoil Excavation	cubic metre	21,398.00	11.20	$239,657.60
	60	GRADING - Grading	G235	Borrow Excavation	cubic metre	41,479.00	2.11	$87,520.69
	70	GRADING - Grading	G239	Overhaul	cubic metre kilometre	102,488.00	4.23	$433,524.24
	80	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	271.00	350.00	$94,850.00
	90	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	92.00	400.00	$36,800.00

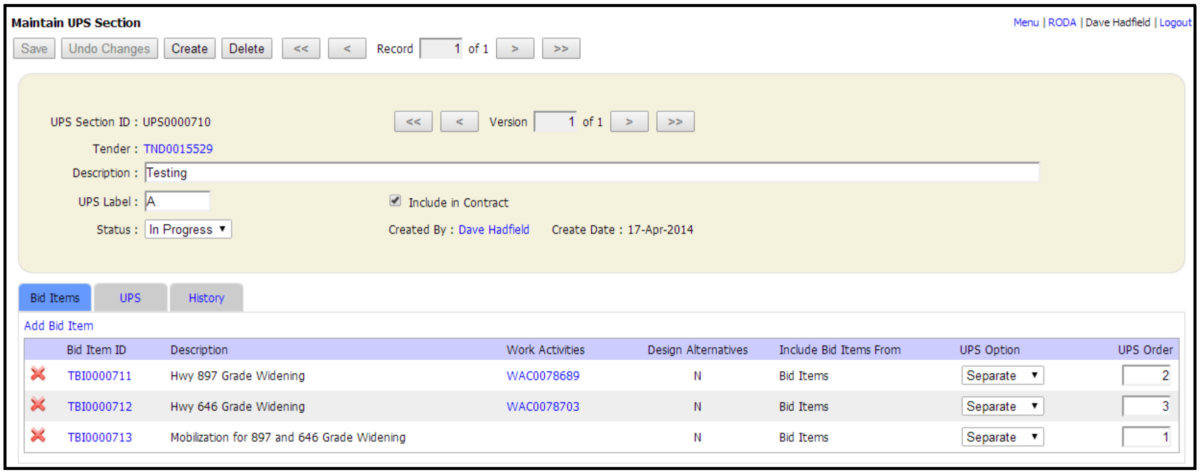
Alert! The Maintain UPS Section screen needs to be refreshed (F5) to update the UPS tab with any changes made on the Maintain Bid Item Design screen.

Editing UPS Order

Changing the UPS Order on the Maintain UPS Section screen will impact the UPS tab and the order of the Items.

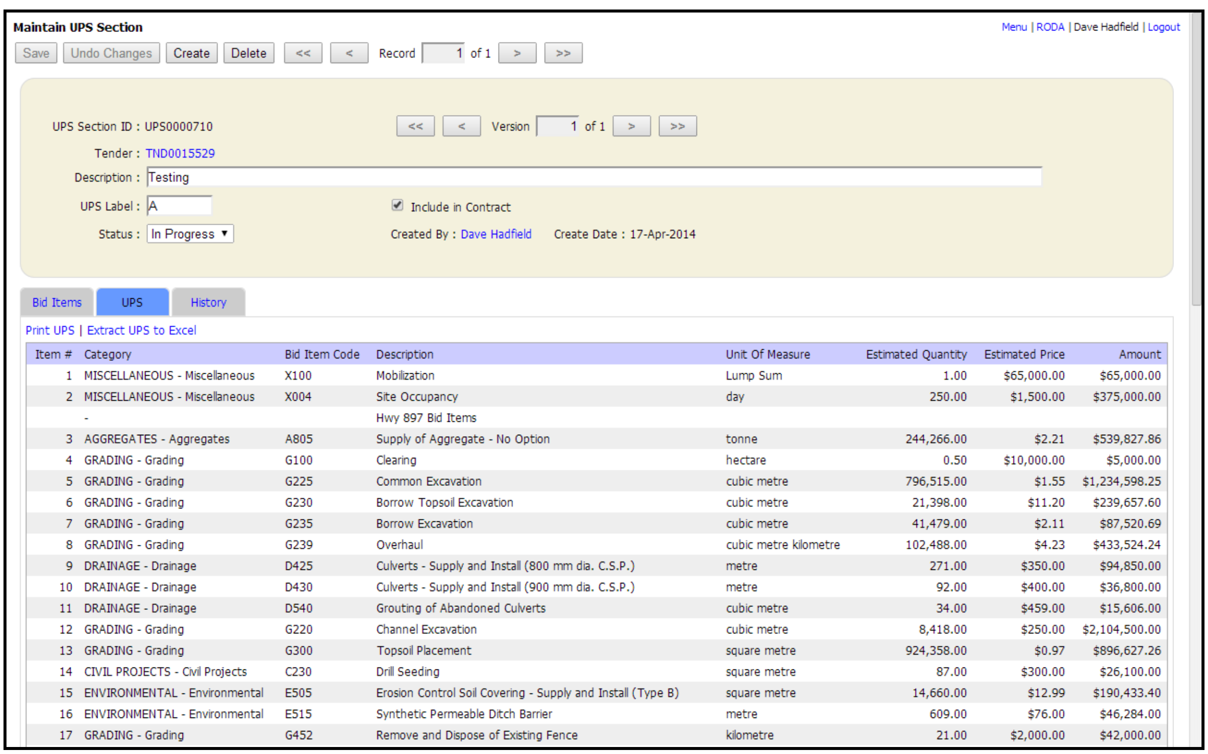
When Tender Bid Items have a UPS Option of Separate, the UPS Order determines which list of Bid Items will appear on the UPS tab: first, second, third, etc.

Figure 11.32 Maintain UP Section screen - Bid Item tab



Bid Item ID	Description	Work Activities	Design Alternatives	Include Bid Items From	UPS Option	UPS Order
TBI0000711	Hwy 897 Grade Widening	WAC0078689	N	Bid Items	Separate	2
TBI0000712	Hwy 646 Grade Widening	WAC0078703	N	Bid Items	Separate	3
TBI0000713	Mobilization for 897 and 646 Grade Widening		N	Bid Items	Separate	1

Figure 11.33 Maintain UPS Section screen - UPS tab - Separate Tender Bid Items



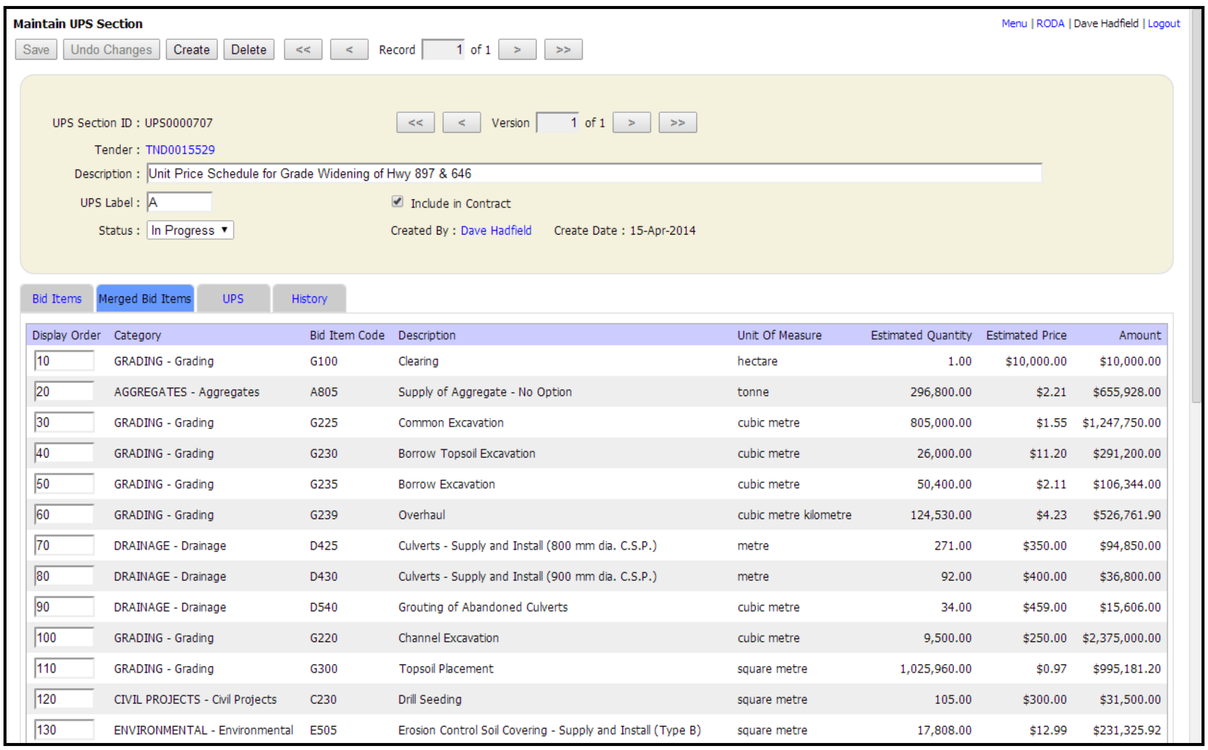
Item #	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
1	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	$65,000.00	$65,000.00
2	MISCELLANEOUS - Miscellaneous	X004	Site Occupancy	day	250.00	$1,500.00	$375,000.00
	-		Hwy 897 Bid Items				
3	AGGREGATES - Aggregates	A805	Supply of Aggregate - No Option	tonne	244,266.00	$2.21	$539,827.86
4	GRADING - Grading	G100	Clearing	hectare	0.50	$10,000.00	$5,000.00
5	GRADING - Grading	G225	Common Excavation	cubic metre	796,515.00	$1.55	$1,234,598.25
6	GRADING - Grading	G230	Borrow Topsoil Excavation	cubic metre	21,398.00	$11.20	$239,657.60
7	GRADING - Grading	G235	Borrow Excavation	cubic metre	41,479.00	$2.11	$87,520.69
8	GRADING - Grading	G239	Overhaul	cubic metre kilometre	102,488.00	$4.23	$433,524.24
9	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	271.00	$350.00	$94,850.00
10	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	92.00	$400.00	$36,800.00
11	DRAINAGE - Drainage	D540	Grouting of Abandoned Culverts	cubic metre	34.00	$459.00	$15,606.00
12	GRADING - Grading	G220	Channel Excavation	cubic metre	8,418.00	$250.00	$2,104,500.00
13	GRADING - Grading	G300	Topsoil Placement	square metre	924,358.00	$0.97	$896,627.26
14	CIVIL PROJECTS - Civil Projects	C230	Drill Seeding	square metre	87.00	$300.00	$26,100.00
15	ENVIRONMENTAL - Environmental	E505	Erosion Control Soil Covering - Supply and Install (Type B)	square metre	14,660.00	$12.99	$190,433.40
16	ENVIRONMENTAL - Environmental	E515	Synthetic Permeable Ditch Barrier	metre	609.00	$76.00	$46,284.00
17	GRADING - Grading	G452	Remove and Dispose of Existing Fence	kilometre	21.00	$2,000.00	$42,000.00

Editing Merged Bid Item Display Order Values

On the Maintain UPS Section screen, in the Merged Bid Items tab, the Display Order values can be changed to rearrange the order of individual Bid Items. Save the changes and they are reflected in the UPS tab.

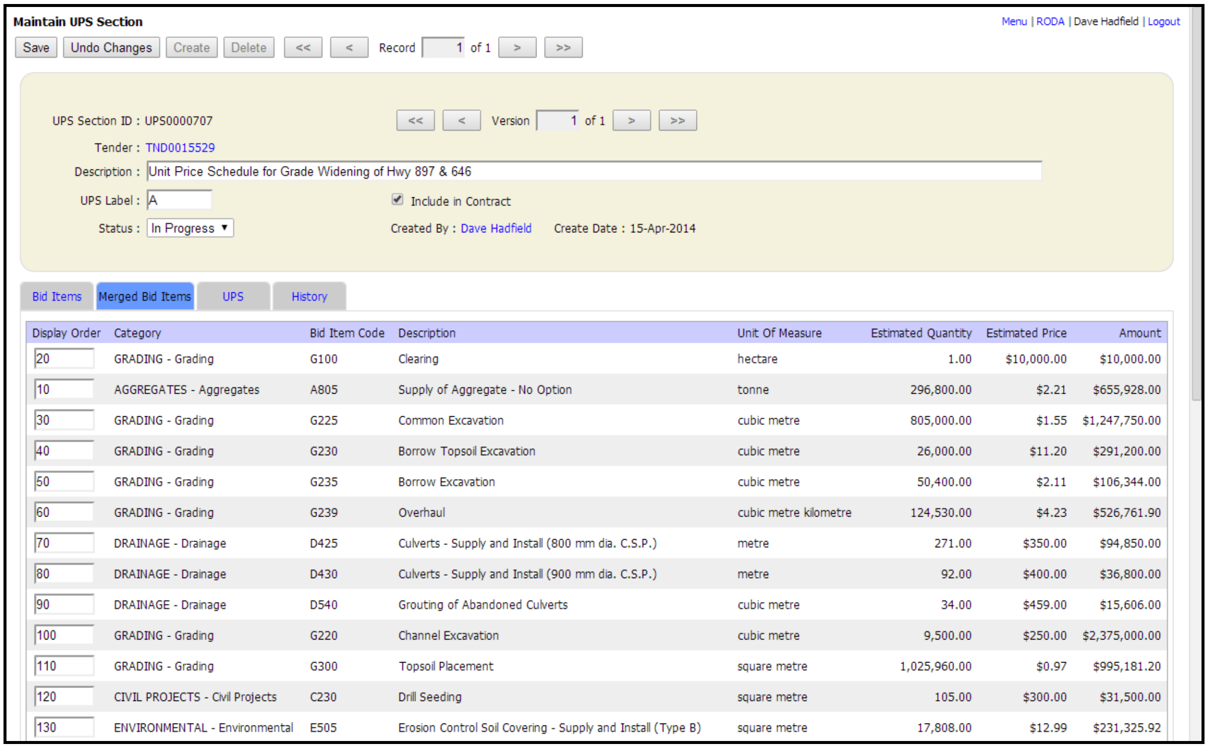
If the Merge has already been performed, changing individual Tender Bid Items (on the Maintain Bid Item Design screen) will not change the Merged Bid Items tab or the UPS tab. Because you can manually edit the Display Order on the Merged Bid Items tab, any changes on other screens (i.e. the Maintain Bid Item Design screen) will have no affect on the order of Bid Items.

Figure 11.34 Maintain UPS Section - Merged Bid Items - Original Display Order



Hint: The Display Order values on the Merged Bid Items tab will not be over written by changes made to individual Tender Bid Items.

Figure 11.35 Maintain UPS Section - Merged Bid Items - Edited Display Order



Maintain UPS Section

Menu | RODA | Dave Hadfield | Logout

Save | Undo Changes | Create | Delete | << | < | Record 1 of 1 | > | >>

UPS Section ID : UPS0000707

<< | < | Version 1 of 1 | > | >>

Tender : TND0015529

Description : Unit Price Schedule for Grade Widening of Hwy 897 & 646

UPS Label : A

Include in Contract

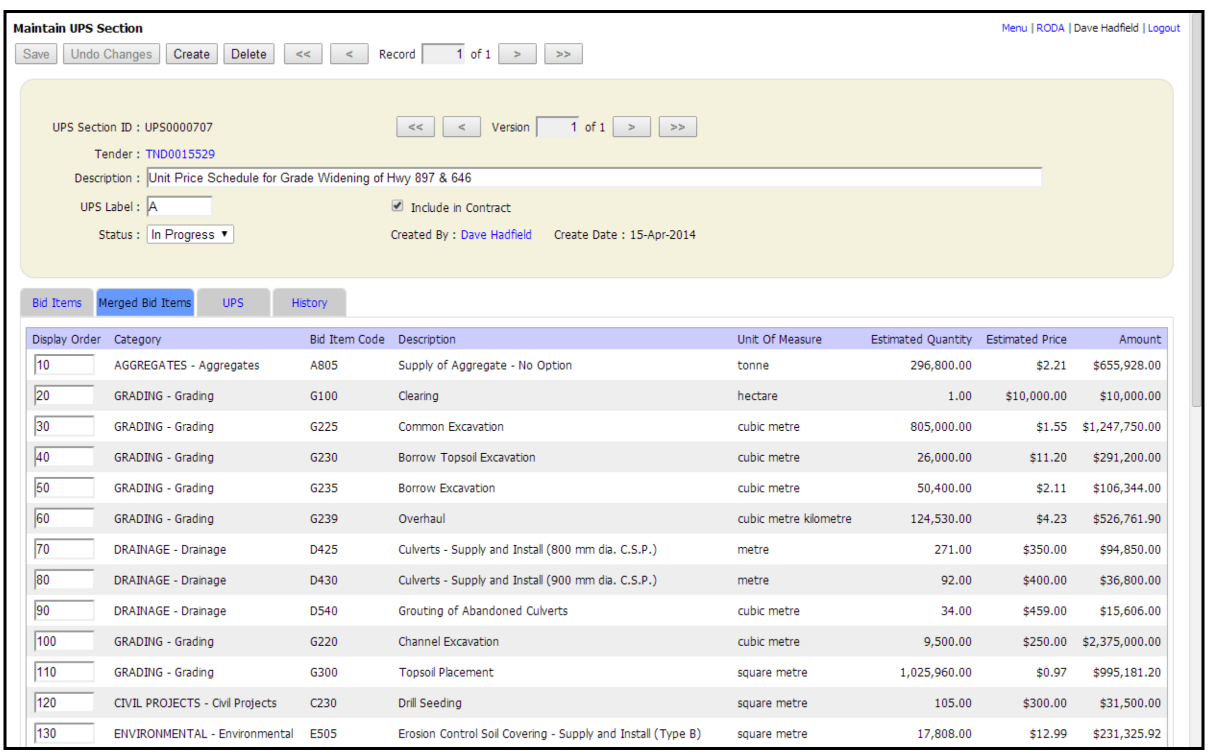
Status : In Progress

Created By : Dave Hadfield   Create Date : 15-Apr-2014

Bid Items | Merged Bid Items | UPS | History

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
20	GRADING - Grading	G100	Clearing	hectare	1.00	$10,000.00	$10,000.00
10	AGGREGATES - Aggregates	A805	Supply of Aggregate - No Option	tonne	296,800.00	$2.21	$655,928.00
30	GRADING - Grading	G225	Common Excavation	cubic metre	805,000.00	$1.55	$1,247,750.00
40	GRADING - Grading	G230	Borrow Topsoil Excavation	cubic metre	26,000.00	$11.20	$291,200.00
50	GRADING - Grading	G235	Borrow Excavation	cubic metre	50,400.00	$2.11	$106,344.00
60	GRADING - Grading	G239	Overhaul	cubic metre kilometre	124,530.00	$4.23	$526,761.90
70	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	271.00	$350.00	$94,850.00
80	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	92.00	$400.00	$36,800.00
90	DRAINAGE - Drainage	D540	Grouting of Abandoned Culverts	cubic metre	34.00	$459.00	$15,606.00
100	GRADING - Grading	G220	Channel Excavation	cubic metre	9,500.00	$250.00	$2,375,000.00
110	GRADING - Grading	G300	Topsoil Placement	square metre	1,025,960.00	$0.97	$995,181.20
120	CIVIL PROJECTS - Civil Projects	C230	Drill Seeding	square metre	105.00	$300.00	$31,500.00
130	ENVIRONMENTAL - Environmental	E505	Erosion Control Soil Covering - Supply and Install (Type B)	square metre	17,808.00	$12.99	$231,325.92

Figure 11.36 Maintain UPS Section - Merged Bid Items - Saved Display Order



Maintain UPS Section

Menu | RODA | Dave Hadfield | Logout

Save | Undo Changes | Create | Delete | << | < | Record 1 of 1 | > | >>

UPS Section ID : UPS0000707

<< | < | Version 1 of 1 | > | >>

Tender : TND0015529

Description : Unit Price Schedule for Grade Widening of Hwy 897 & 646

UPS Label : A

Include in Contract

Status : In Progress

Created By : Dave Hadfield   Create Date : 15-Apr-2014

Bid Items | Merged Bid Items | UPS | History

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	AGGREGATES - Aggregates	A805	Supply of Aggregate - No Option	tonne	296,800.00	$2.21	$655,928.00
20	GRADING - Grading	G100	Clearing	hectare	1.00	$10,000.00	$10,000.00
30	GRADING - Grading	G225	Common Excavation	cubic metre	805,000.00	$1.55	$1,247,750.00
40	GRADING - Grading	G230	Borrow Topsoil Excavation	cubic metre	26,000.00	$11.20	$291,200.00
50	GRADING - Grading	G235	Borrow Excavation	cubic metre	50,400.00	$2.11	$106,344.00
60	GRADING - Grading	G239	Overhaul	cubic metre kilometre	124,530.00	$4.23	$526,761.90
70	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	271.00	$350.00	$94,850.00
80	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	92.00	$400.00	$36,800.00
90	DRAINAGE - Drainage	D540	Grouting of Abandoned Culverts	cubic metre	34.00	$459.00	$15,606.00
100	GRADING - Grading	G220	Channel Excavation	cubic metre	9,500.00	$250.00	$2,375,000.00
110	GRADING - Grading	G300	Topsoil Placement	square metre	1,025,960.00	$0.97	$995,181.20
120	CIVIL PROJECTS - Civil Projects	C230	Drill Seeding	square metre	105.00	$300.00	$31,500.00
130	ENVIRONMENTAL - Environmental	E505	Erosion Control Soil Covering - Supply and Install (Type B)	square metre	17,808.00	$12.99	$231,325.92

Municipality Example

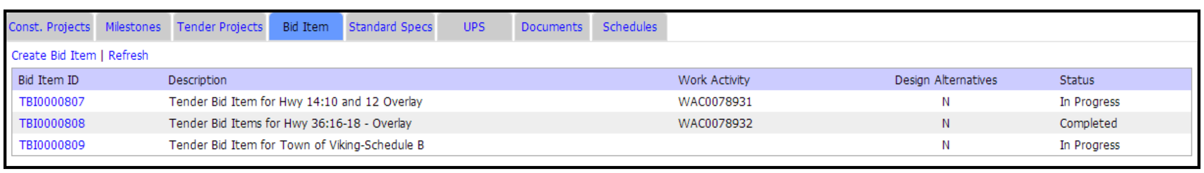
This section of the UPS chapter covers an example of what Tender Bid Items and the UPS could look like if a Tender involved a municipality. This section covers several chapters in the guide: creating Tender Bid Items, creating UPS Schedules, and creating UPS Evaluation Formats. In this example, the Tender is to determine the costs for an overlay and for similar work required by the municipality near by. The municipality will cover the costs for their work in a separate contract that they will create and administer.

Looking ahead at what the results need to look like, we want two UPS Sections: one for the Overlay (UPS Section A) and the other for the municipality’s work (UPS Section B). We need to create two sections; to include the overlay in the construction contract and leave the municipality work out. Using Alternative Tender Bid Items would not work as both pieces of work will go ahead. We are not considering one or the other.

Tender Bid Items

The overlay project has two work activities and therefore requires two Tender Bid Items. The Mobilization is included in each of the Tender Bid Items for Transportation. The same is also true for the Tender Bid Item for the Municipality.

Figure 11.37 Municipality UPS example - Bid Item tab

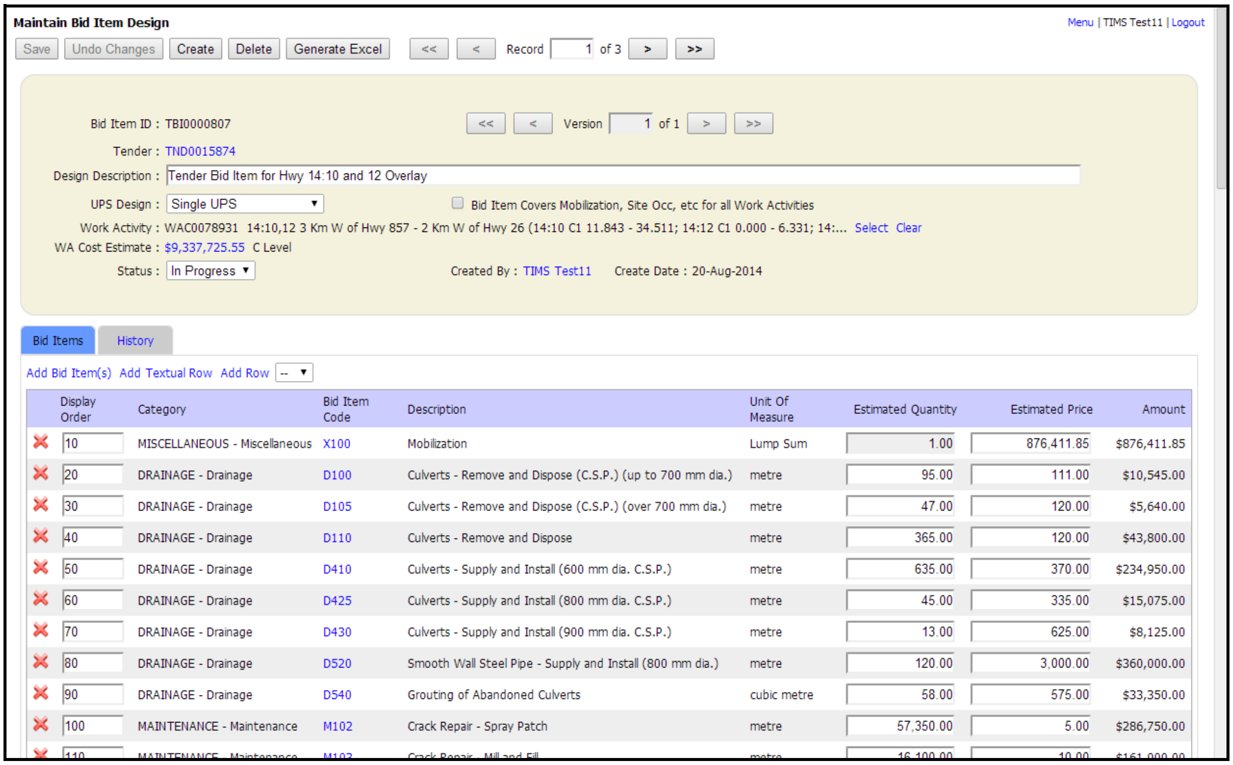


Const. Projects | Milestones | Tender Projects | Bid Item | Standard Specs | UPS | Documents | Schedules

Create Bid Item | Refresh

Bid Item ID	Description	Work Activity	Design Alternatives	Status
TBI0000807	Tender Bid Item for Hwy 14:10 and 12 Overlay	WAC0078931	N	In Progress
TBI0000808	Tender Bid Items for Hwy 36:16-18 - Overlay	WAC0078932	N	Completed
TBI0000809	Tender Bid Item for Town of Viking-Schedule B		N	In Progress

Figure 11.38 Municipality UPS example - Tender Bid Item - Overlay 1



Maintain Bid Item Design

Menu | TIMS Test11 | Logout

Save | Undo Changes | Create | Delete | Generate Excel | << | < | Record 1 of 3 | > | >>

Bid Item ID : TBI0000807 << < Version 1 of 1 > >>

Tender : TND0015874

Design Description : Tender Bid Item for Hwy 14:10 and 12 Overlay

UPS Design : Single UPS | Bid Item Covers Mobilization, Site Occ, etc for all Work Activities

Work Activity : WAC0078931 14:10,12 3 Km W of Hwy 857 - 2 Km W of Hwy 26 (14:10 C1 11.843 - 34.511; 14:12 C1 0.000 - 6.331; 14:... Select Clear

WA Cost Estimate : $9,337,725.55 C Level

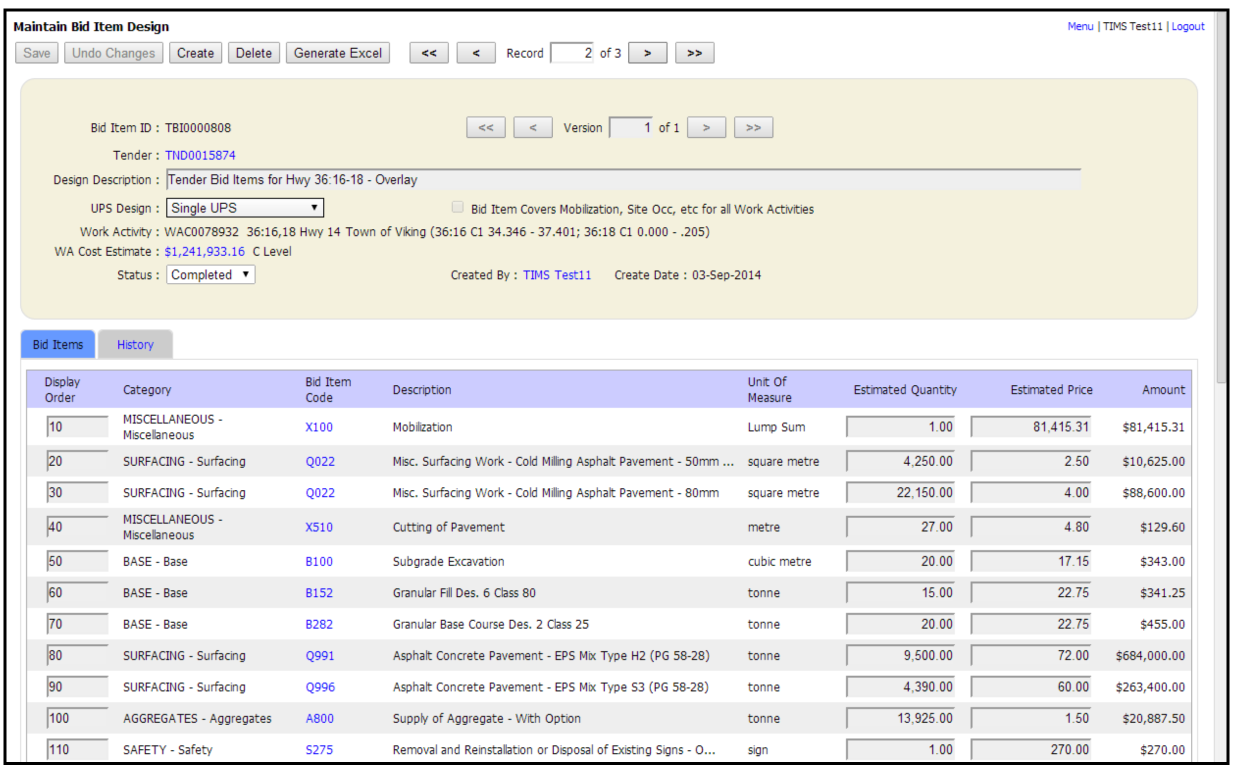
Status : In Progress | Created By : TIMS Test11 | Create Date : 20-Aug-2014

Bid Items | History

Add Bid Item(s) Add Textual Row Add Row --

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	876,411.85	$876,411.85
20	DRAINAGE - Drainage	D100	Culverts - Remove and Dispose (C.S.P.) (up to 700 mm dia.)	metre	95.00	111.00	$10,545.00
30	DRAINAGE - Drainage	D105	Culverts - Remove and Dispose (C.S.P.) (over 700 mm dia.)	metre	47.00	120.00	$5,640.00
40	DRAINAGE - Drainage	D110	Culverts - Remove and Dispose	metre	365.00	120.00	$43,800.00
50	DRAINAGE - Drainage	D410	Culverts - Supply and Install (600 mm dia. C.S.P.)	metre	635.00	370.00	$234,950.00
60	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	45.00	335.00	$15,075.00
70	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	13.00	625.00	$8,125.00
80	DRAINAGE - Drainage	D520	Smooth Wall Steel Pipe - Supply and Install (800 mm dia.)	metre	120.00	3,000.00	$360,000.00
90	DRAINAGE - Drainage	D540	Grouting of Abandoned Culverts	cubic metre	58.00	575.00	$33,350.00
100	MAINTENANCE - Maintenance	M102	Crack Repair - Spray Patch	metre	57,350.00	5.00	$286,750.00
110	MAINTENANCE - Maintenance	M103	Crack Repair - Mill and Fill	metre	16,100.00	10.00	$161,000.00

Figure 11.39 Municipality UPS example - Tender Bid Item - Overlay 2



Maintain Bid Item Design

Menu | TIMS Test11 | Logout

Save | Undo Changes | Create | Delete | Generate Excel | << | < | Record 2 of 3 | > | >>

Bid Item ID : TBI0000808 << < Version 1 of 1 > >>

Tender : TND0015874

Design Description : Tender Bid Items for Hwy 36:16-18 - Overlay

UPS Design : Single UPS | Bid Item Covers Mobilization, Site Occ, etc for all Work Activities

Work Activity : WAC0078932 36:16,18 Hwy 14 Town of Viking (36:16 C1 34.346 - 37.401; 36:18 C1 0.000 - .205)

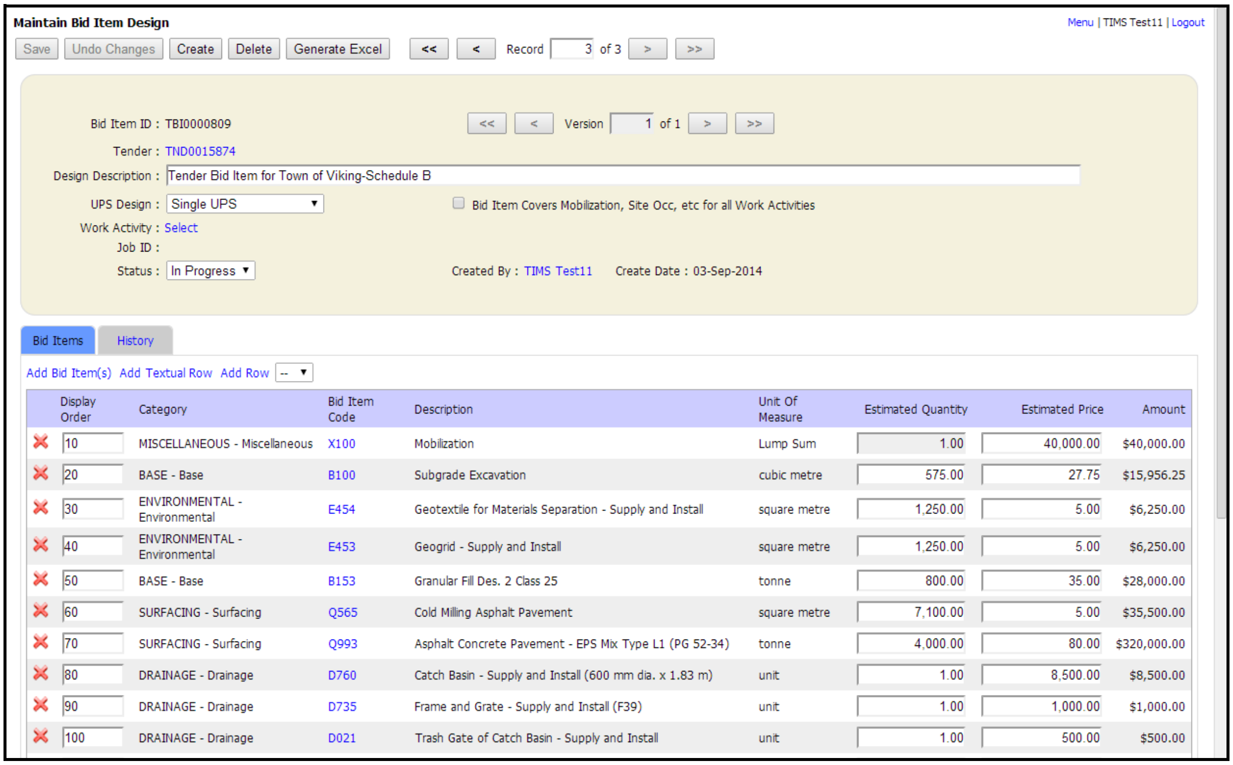
WA Cost Estimate : $1,241,933.16 C Level

Status : Completed | Created By : TIMS Test11 | Create Date : 03-Sep-2014

Bid Items | History

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	81,415.31	$81,415.31
20	SURFACING - Surfacing	Q022	Misc. Surfacing Work - Cold Milling Asphalt Pavement - 50mm ...	square metre	4,250.00	2.50	$10,625.00
30	SURFACING - Surfacing	Q022	Misc. Surfacing Work - Cold Milling Asphalt Pavement - 80mm	square metre	22,150.00	4.00	$88,600.00
40	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	metre	27.00	4.80	$129.60
50	BASE - Base	B100	Subgrade Excavation	cubic metre	20.00	17.15	$343.00
60	BASE - Base	B152	Granular Fill Des. 6 Class 80	tonne	15.00	22.75	$341.25
70	BASE - Base	B282	Granular Base Course Des. 2 Class 25	tonne	20.00	22.75	$455.00
80	SURFACING - Surfacing	Q991	Asphalt Concrete Pavement - EPS Mix Type H2 (PG 58-28)	tonne	9,500.00	72.00	$684,000.00
90	SURFACING - Surfacing	Q996	Asphalt Concrete Pavement - EPS Mix Type S3 (PG 58-28)	tonne	4,390.00	60.00	$263,400.00
100	AGGREGATES - Aggregates	A800	Supply of Aggregate - With Option	tonne	13,925.00	1.50	$20,887.50
110	SAFETY - Safety	S275	Removal and Reinstallation or Disposal of Existing Signs - O...	sign	1.00	270.00	$270.00

Figure 11.40 Municipality UPS example - Tender Bid Item - Muni



Maintain Bid Item Design

Menu | TIMS Test11 | Logout

Save | Undo Changes | Create | Delete | Generate Excel | << | < | Record 3 of 3 | > | >>

Bid Item ID : TBI0000809 — << | < | Version 1 of 1 | > | >>

Tender : TND0015874

Design Description : Tender Bid Item for Town of Viking-Schedule B

UPS Design : Single UPS — Bid Item Covers Mobilization, Site Occ, etc for all Work Activities

Work Activity : Select

Job ID :

Status : In Progress — Created By : TIMS Test11 — Create Date : 03-Sep-2014

Bid Items | History

Add Bid Item(s) Add Textual Row Add Row --

Display Order	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount
10	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	40,000.00	$40,000.00
20	BASE - Base	B100	Subgrade Excavation	cubic metre	575.00	27.75	$15,956.25
30	ENVIRONMENTAL - Environmental	E454	Geotextile for Materials Separation - Supply and Install	square metre	1,250.00	5.00	$6,250.00
40	ENVIRONMENTAL - Environmental	E453	Geogrid - Supply and Install	square metre	1,250.00	5.00	$6,250.00
50	BASE - Base	B153	Granular Fill Des. 2 Class 25	tonne	800.00	35.00	$28,000.00
60	SURFACING - Surfacing	Q565	Cold Milling Asphalt Pavement	square metre	7,100.00	5.00	$35,500.00
70	SURFACING - Surfacing	Q993	Asphalt Concrete Pavement - EPS Mix Type L1 (PG 52-34)	tonne	4,000.00	80.00	$320,000.00
80	DRAINAGE - Drainage	D760	Catch Basin - Supply and Install (600 mm dia. x 1.83 m)	unit	1.00	8,500.00	$8,500.00
90	DRAINAGE - Drainage	D735	Frame and Grate - Supply and Install (F39)	unit	1.00	1,000.00	$1,000.00
100	DRAINAGE - Drainage	D021	Trash Gate of Catch Basin - Supply and Install	unit	1.00	500.00	$500.00

UPS Sections

There is one Unit Price Schedule Section for each of the Tender Bid Items. This allows Schedule A (Transportation work) to be included in the Construction Contract and allows Schedule B (Municipality work) to be excluded from the contract.

Figure 11.41 Municipality UPS example – UPS tab

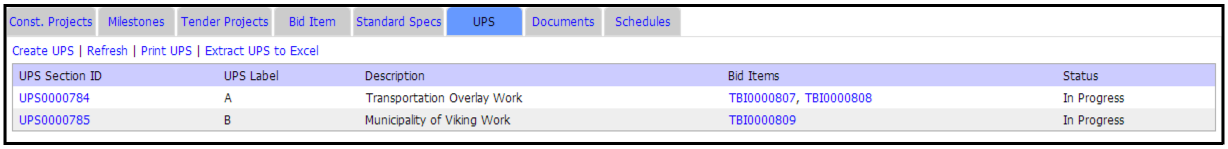


Figure 11.42 Municipality UPS example – UPS Section A

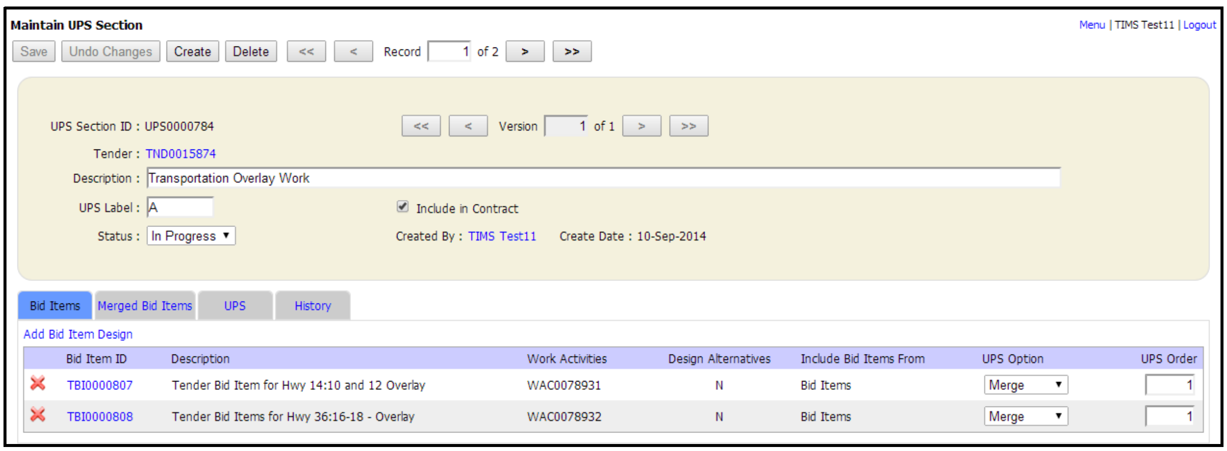
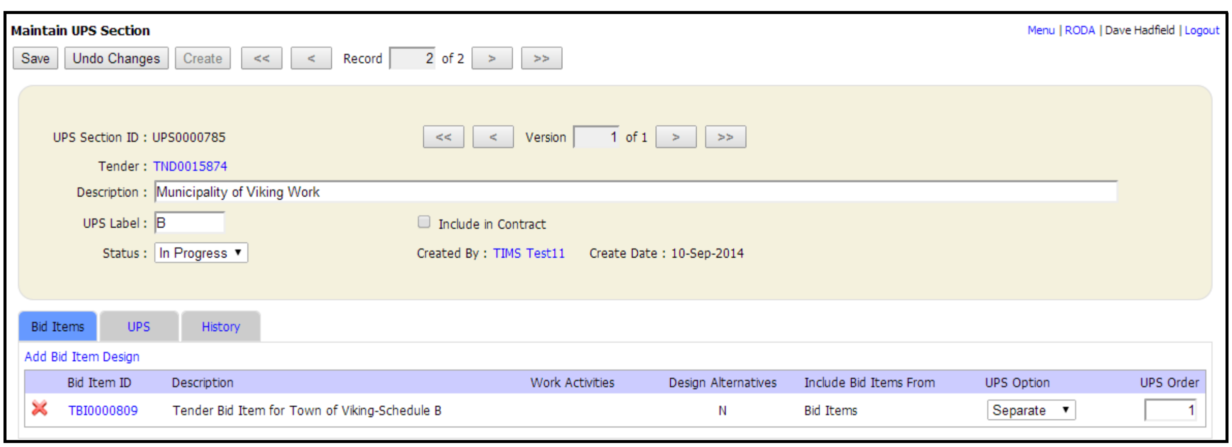


Figure 11.43 Municipality UPS example – UPS Section B

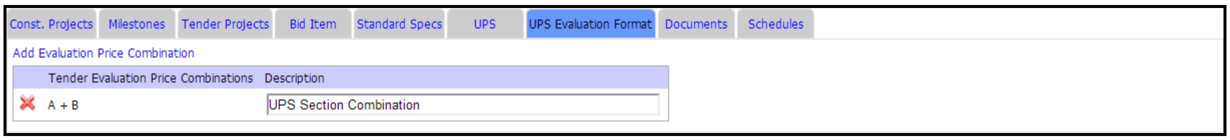


UPS Evaluation Format

The final step is to use the UPS Evaluation Format tab to create a combination using Sections A and B.

Hint: On the Maintain Tender screen in the UPS tab, the Refresh link will only update the UPS tab. If two or more UPS Sections have been created, the UPS Evaluation Format tab will not display until the whole Maintain Tender screen has been refreshed (browser refresh).

Figure 11.44 Municipality example – UPS Evaluation Format tab



See: For more information on the UPS Evaluation tab: *See* ***"Create UPS Evaluation Format" on page 13-1 for additional information.***

Print or Extract UPS

There are two places where the Print UPS and Extract UPS to Excel links appears:

- the UPS tab on the Maintain Tender screen
- the UPS tab on the Maintain UPS Section screen

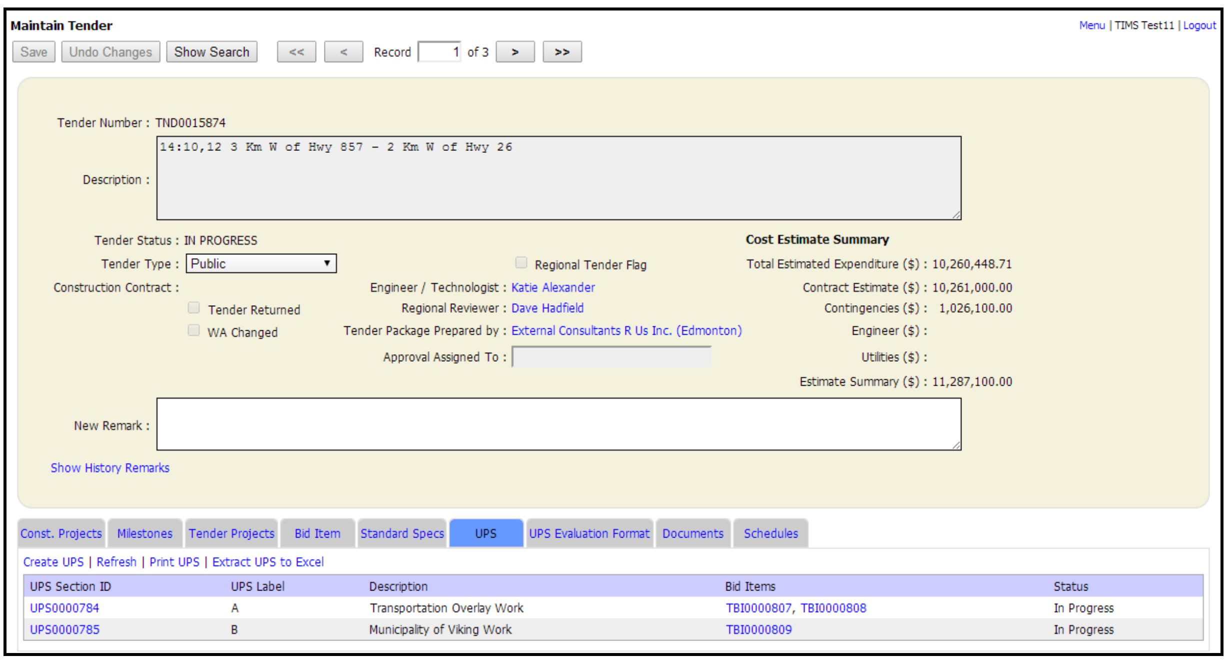
The Print UPS link will generate a PDF file and the Extract UPS to Excel link will create a MS Excel file.

Hint: The links on the UPS tab of the Maintain Tender screen will print/extract the entire Unit Price Schedule (all sections).

Print Complete UPS

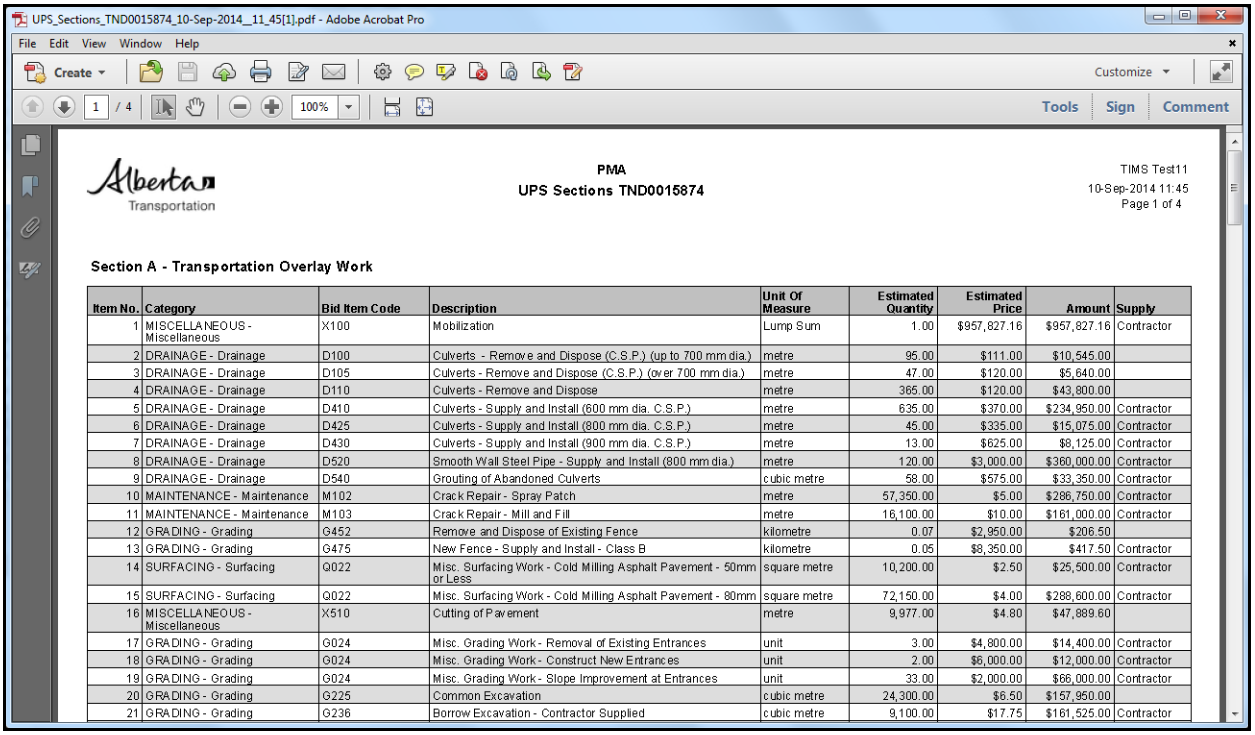
The following three figures show the UPS tab on the Maintain Tender screen and both output results. In the PDF example, notice the total number of pages. In the Excel example notice the number of worksheets.

Figure 11.45 Maintain Tender - UPS tab



Hint: The Extract to Excel generates one worksheet for each UPS Section.

Figure 11.46 UPS tab - Print UPS – PDF All



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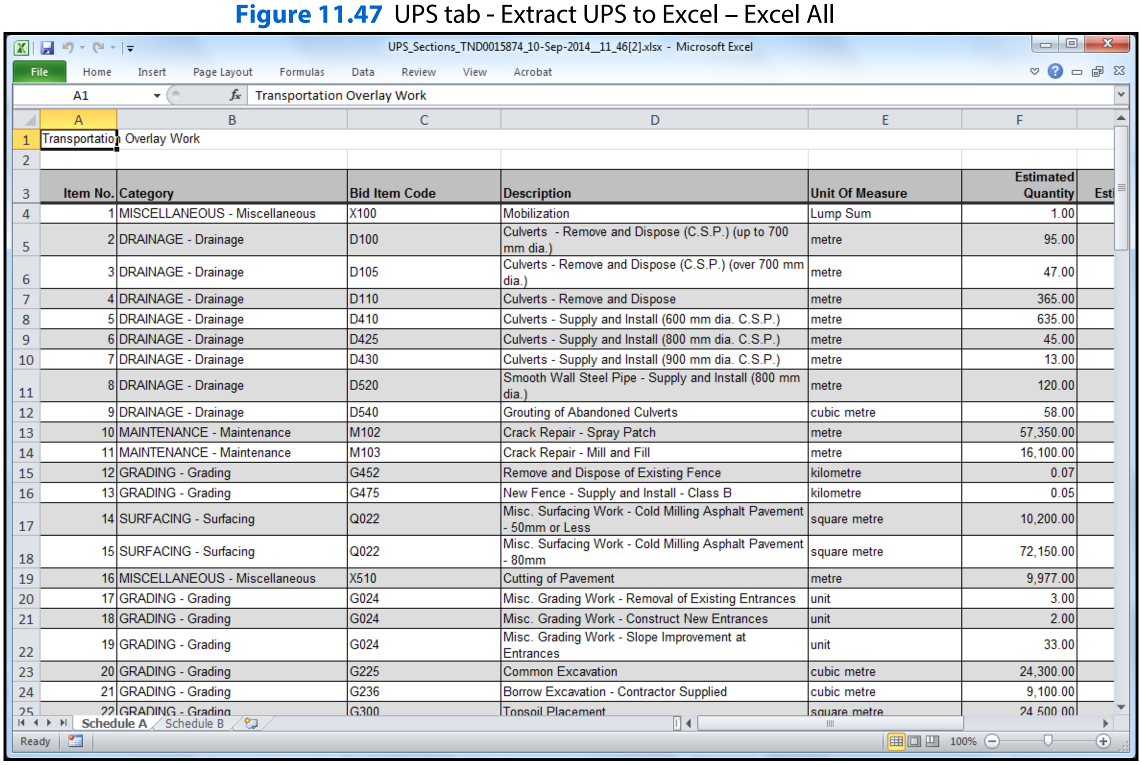
Section A - Transportation Overlay Work

Item No.	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount	Supply
1	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	$957,827.16	$957,827.16	Contractor
2	DRAINAGE - Drainage	D100	Culverts - Remove and Dispose (C.S.P.) (up to 700 mm dia.)	metre	95.00	$111.00	$10,545.00	
3	DRAINAGE - Drainage	D105	Culverts - Remove and Dispose (C.S.P.) (over 700 mm dia.)	metre	47.00	$120.00	$5,640.00	
4	DRAINAGE - Drainage	D110	Culverts - Remove and Dispose	metre	365.00	$120.00	$43,800.00	
5	DRAINAGE - Drainage	D410	Culverts - Supply and Install (600 mm dia. C.S.P.)	metre	635.00	$370.00	$234,950.00	Contractor
6	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	45.00	$335.00	$15,075.00	Contractor
7	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	13.00	$625.00	$8,125.00	Contractor
8	DRAINAGE - Drainage	D520	Smooth Wall Steel Pipe - Supply and Install (800 mm dia.)	metre	120.00	$3,000.00	$360,000.00	Contractor
9	DRAINAGE - Drainage	D540	Grouting of Abandoned Culverts	cubic metre	58.00	$575.00	$33,350.00	Contractor
10	MAINTENANCE - Maintenance	M102	Crack Repair - Spray Patch	metre	57,350.00	$5.00	$286,750.00	Contractor
11	MAINTENANCE - Maintenance	M103	Crack Repair - Mill and Fill	metre	16,100.00	$10.00	$161,000.00	Contractor
12	GRADING - Grading	G452	Remove and Dispose of Existing Fence	kilometre	0.07	$2,950.00	$206.50	
13	GRADING - Grading	G475	New Fence - Supply and Install - Class B	kilometre	0.05	$8,350.00	$417.50	Contractor
14	SURFACING - Surfacing	Q022	Misc. Surfacing Work - Cold Milling Asphalt Pavement - 50mm or Less	square metre	10,200.00	$2.50	$25,500.00	Contractor
15	SURFACING - Surfacing	Q022	Misc. Surfacing Work - Cold Milling Asphalt Pavement - 80mm	square metre	72,150.00	$4.00	$288,600.00	Contractor
16	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	metre	9,977.00	$4.80	$47,889.60	
17	GRADING - Grading	G024	Misc. Grading Work - Removal of Existing Entrances	unit	3.00	$4,800.00	$14,400.00	Contractor
18	GRADING - Grading	G024	Misc. Grading Work - Construct New Entrances	unit	2.00	$6,000.00	$12,000.00	Contractor
19	GRADING - Grading	G024	Misc. Grading Work - Slope Improvement at Entrances	unit	33.00	$2,000.00	$66,000.00	Contractor
20	GRADING - Grading	G225	Common Excavation	cubic metre	24,300.00	$6.50	$157,950.00	
21	GRADING - Grading	G236	Borrow Excavation - Contractor Supplied	cubic metre	9,100.00	$17.75	$161,525.00	Contractor

Figure 11.47 UPS tab - Extract UPS to Excel – Excel All



Transportation Overlay Work

Item No.	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity
1	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00
2	DRAINAGE - Drainage	D100	Culverts - Remove and Dispose (C.S.P.) (up to 700 mm dia.)	metre	95.00
3	DRAINAGE - Drainage	D105	Culverts - Remove and Dispose (C.S.P.) (over 700 mm dia.)	metre	47.00
4	DRAINAGE - Drainage	D110	Culverts - Remove and Dispose	metre	365.00
5	DRAINAGE - Drainage	D410	Culverts - Supply and Install (600 mm dia. C.S.P.)	metre	635.00
6	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	45.00
7	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	13.00
8	DRAINAGE - Drainage	D520	Smooth Wall Steel Pipe - Supply and Install (800 mm dia.)	metre	120.00
9	DRAINAGE - Drainage	D540	Grouting of Abandoned Culverts	cubic metre	58.00
10	MAINTENANCE - Maintenance	M102	Crack Repair - Spray Patch	metre	57,350.00
11	MAINTENANCE - Maintenance	M103	Crack Repair - Mill and Fill	metre	16,100.00
12	GRADING - Grading	G452	Remove and Dispose of Existing Fence	kilometre	0.07
13	GRADING - Grading	G475	New Fence - Supply and Install - Class B	kilometre	0.05
14	SURFACING - Surfacing	Q022	Misc. Surfacing Work - Cold Milling Asphalt Pavement - 50mm or Less	square metre	10,200.00
15	SURFACING - Surfacing	Q022	Misc. Surfacing Work - Cold Milling Asphalt Pavement - 80mm	square metre	72,150.00
16	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	metre	9,977.00
17	GRADING - Grading	G024	Misc. Grading Work - Removal of Existing Entrances	unit	3.00
18	GRADING - Grading	G024	Misc. Grading Work - Construct New Entrances	unit	2.00
19	GRADING - Grading	G024	Misc. Grading Work - Slope Improvement at Entrances	unit	33.00
20	GRADING - Grading	G225	Common Excavation	cubic metre	24,300.00
21	GRADING - Grading	G236	Borrow Excavation - Contractor Supplied	cubic metre	9,100.00
22	GRADING - Grading	G300	Topsoil Placement	square metre	24,500.00

Print UPS Sections

The following three figures show the UPS tab on the Maintain UPS Section screen and both output results.

The Print UPS and Extract UPS to Excel links on the Maintain UPS Section screen will print only the selected Section. In the PDF example, notice the total number of pages. In the Excel example notice only one worksheet is available.

Figure 11.48 Maintain UPS Section screen – UPS tab

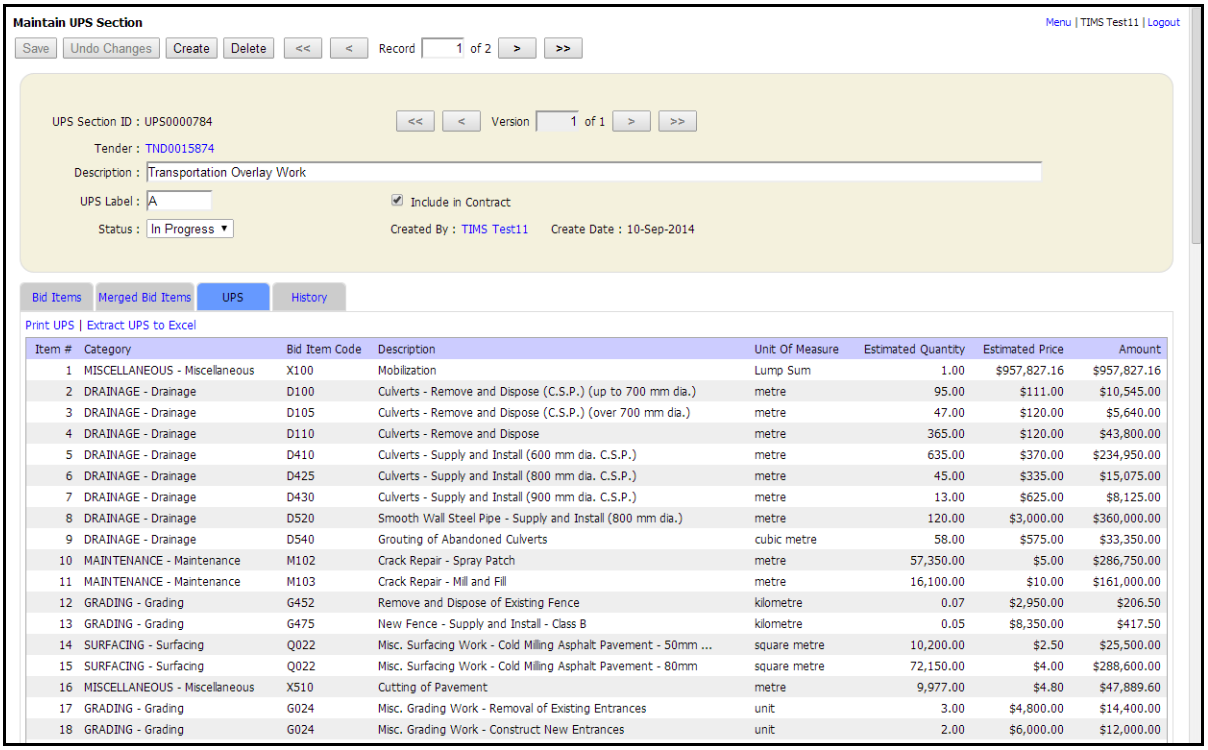
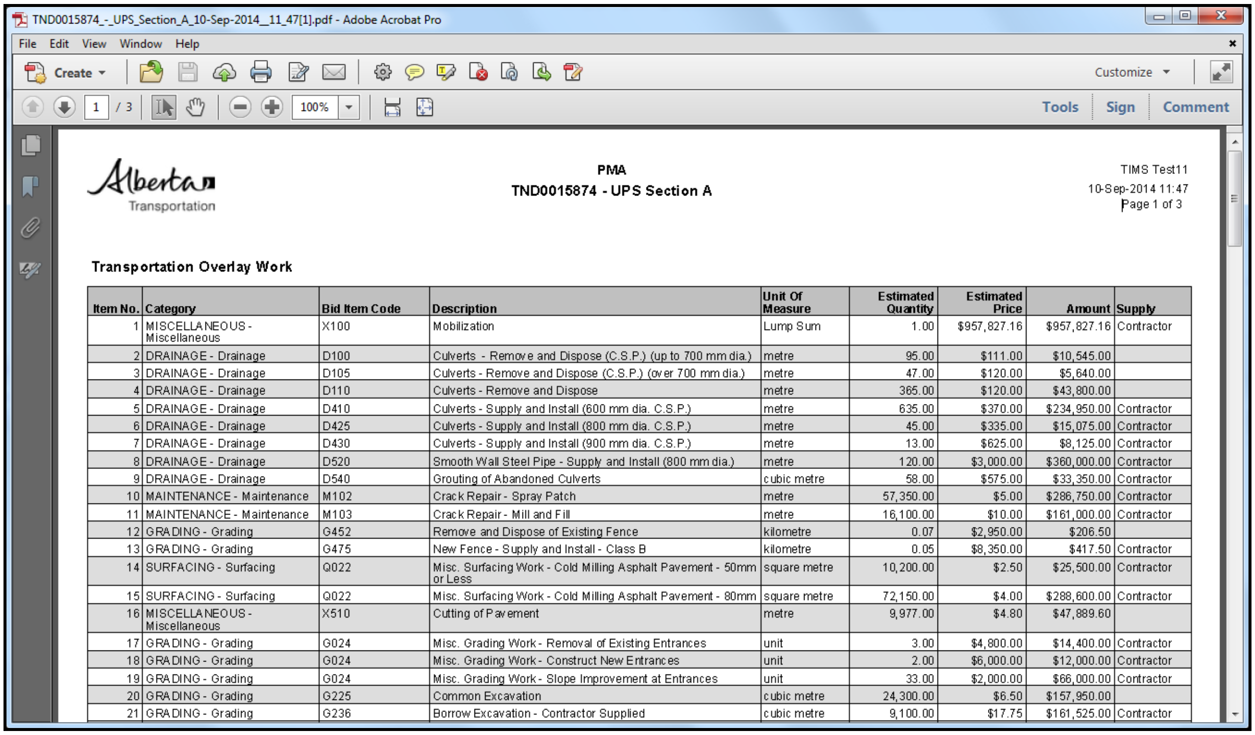


Figure 11.49 Maintain UPS Section - Print UPS – PDF Section



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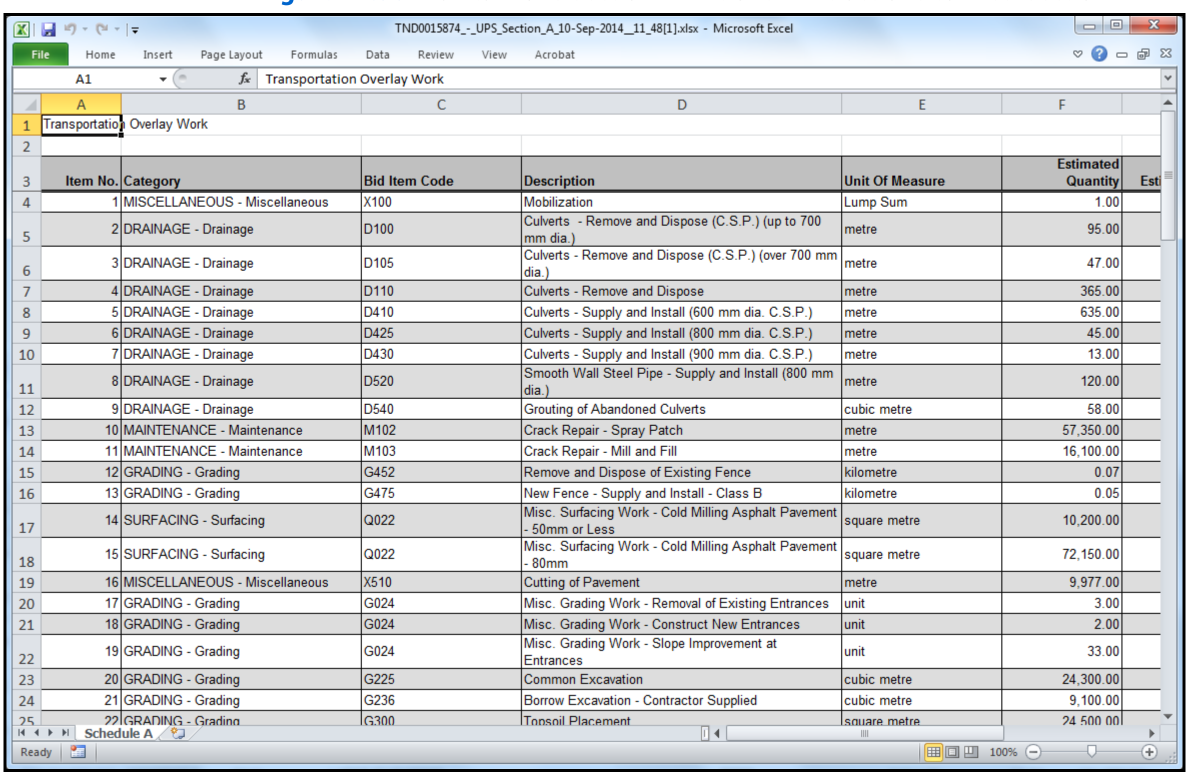
Transportation Overlay Work

Item No.	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity	Estimated Price	Amount	Supply
1	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00	$957,827.16	$957,827.16	Contractor
2	DRAINAGE - Drainage	D100	Culverts - Remove and Dispose (C.S.P.) (up to 700 mm dia.)	metre	95.00	$111.00	$10,545.00	
3	DRAINAGE - Drainage	D105	Culverts - Remove and Dispose (C.S.P.) (over 700 mm dia.)	metre	47.00	$120.00	$5,640.00	
4	DRAINAGE - Drainage	D110	Culverts - Remove and Dispose	metre	365.00	$120.00	$43,800.00	
5	DRAINAGE - Drainage	D410	Culverts - Supply and Install (600 mm dia. C.S.P.)	metre	635.00	$370.00	$234,950.00	Contractor
6	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	45.00	$335.00	$15,075.00	Contractor
7	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	13.00	$625.00	$8,125.00	Contractor
8	DRAINAGE - Drainage	D520	Smooth Wall Steel Pipe - Supply and Install (800 mm dia.)	metre	120.00	$3,000.00	$360,000.00	Contractor
9	DRAINAGE - Drainage	D540	Grouting of Abandoned Culverts	cubic metre	58.00	$575.00	$33,350.00	Contractor
10	MAINTENANCE - Maintenance	M102	Crack Repair - Spray Patch	metre	57,350.00	$5.00	$286,750.00	Contractor
11	MAINTENANCE - Maintenance	M103	Crack Repair - Mill and Fill	metre	16,100.00	$10.00	$161,000.00	Contractor
12	GRADING - Grading	G452	Remove and Dispose of Existing Fence	kilometre	0.07	$2,950.00	$206.50	
13	GRADING - Grading	G475	New Fence - Supply and Install - Class B	kilometre	0.05	$8,350.00	$417.50	Contractor
14	SURFACING - Surfacing	Q022	Misc. Surfacing Work - Cold Milling Asphalt Pavement - 50mm or Less	square metre	10,200.00	$2.50	$25,500.00	Contractor
15	SURFACING - Surfacing	Q022	Misc. Surfacing Work - Cold Milling Asphalt Pavement - 80mm	square metre	72,150.00	$4.00	$288,600.00	Contractor
16	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	metre	9,977.00	$4.80	$47,889.60	
17	GRADING - Grading	G024	Misc. Grading Work - Removal of Existing Entrances	unit	3.00	$4,800.00	$14,400.00	Contractor
18	GRADING - Grading	G024	Misc. Grading Work - Construct New Entrances	unit	2.00	$6,000.00	$12,000.00	Contractor
19	GRADING - Grading	G024	Misc. Grading Work - Slope Improvement at Entrances	unit	33.00	$2,000.00	$66,000.00	Contractor
20	GRADING - Grading	G225	Common Excavation	cubic metre	24,300.00	$6.50	$157,950.00	
21	GRADING - Grading	G236	Borrow Excavation - Contractor Supplied	cubic metre	9,100.00	$17.75	$161,525.00	Contractor

Figure 11.50 Maintain UPS Section - Print UPS – Extract UPS to Excel Section



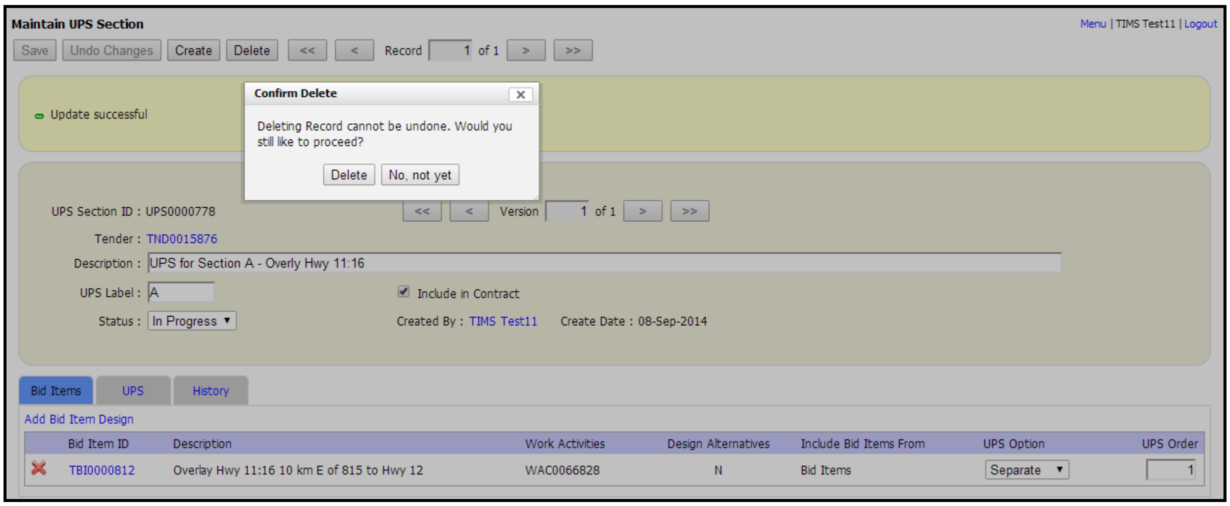
Transportation Overlay Work

Item No.	Category	Bid Item Code	Description	Unit Of Measure	Estimated Quantity
1	MISCELLANEOUS - Miscellaneous	X100	Mobilization	Lump Sum	1.00
2	DRAINAGE - Drainage	D100	Culverts - Remove and Dispose (C.S.P.) (up to 700 mm dia.)	metre	95.00
3	DRAINAGE - Drainage	D105	Culverts - Remove and Dispose (C.S.P.) (over 700 mm dia.)	metre	47.00
4	DRAINAGE - Drainage	D110	Culverts - Remove and Dispose	metre	365.00
5	DRAINAGE - Drainage	D410	Culverts - Supply and Install (600 mm dia. C.S.P.)	metre	635.00
6	DRAINAGE - Drainage	D425	Culverts - Supply and Install (800 mm dia. C.S.P.)	metre	45.00
7	DRAINAGE - Drainage	D430	Culverts - Supply and Install (900 mm dia. C.S.P.)	metre	13.00
8	DRAINAGE - Drainage	D520	Smooth Wall Steel Pipe - Supply and Install (800 mm dia.)	metre	120.00
9	DRAINAGE - Drainage	D540	Grouting of Abandoned Culverts	cubic metre	58.00
10	MAINTENANCE - Maintenance	M102	Crack Repair - Spray Patch	metre	57,350.00
11	MAINTENANCE - Maintenance	M103	Crack Repair - Mill and Fill	metre	16,100.00
12	GRADING - Grading	G452	Remove and Dispose of Existing Fence	kilometre	0.07
13	GRADING - Grading	G475	New Fence - Supply and Install - Class B	kilometre	0.05
14	SURFACING - Surfacing	Q022	Misc. Surfacing Work - Cold Milling Asphalt Pavement - 50mm or Less	square metre	10,200.00
15	SURFACING - Surfacing	Q022	Misc. Surfacing Work - Cold Milling Asphalt Pavement - 80mm	square metre	72,150.00
16	MISCELLANEOUS - Miscellaneous	X510	Cutting of Pavement	metre	9,977.00
17	GRADING - Grading	G024	Misc. Grading Work - Removal of Existing Entrances	unit	3.00
18	GRADING - Grading	G024	Misc. Grading Work - Construct New Entrances	unit	2.00
19	GRADING - Grading	G024	Misc. Grading Work - Slope Improvement at Entrances	unit	33.00
20	GRADING - Grading	G225	Common Excavation	cubic metre	24,300.00
21	GRADING - Grading	G236	Borrow Excavation - Contractor Supplied	cubic metre	9,100.00
22	GRADING - Grading	G300	Topsoil Placement	square metre	24,500.00

Delete UPS Section

UPS Sections can be deleted and depending on the version displayed at the time, different results will occur. Only the most current version will have an active Delete button. Therefore, if the version is 1 and the Delete button is selected: PMA will delete the UPS Section from any UPS Evaluation Formats that the section may have been included in, and the entire UPS Section will then be deleted from PMA. If the version deleted is not version 1, only that version is deleted making the previous version the new current version (e.g. deleting version 3 makes version 2 the new current version).

Figure 11.51 Maintain UPS Section screen – Delete UPS confirmation



Chapter 12: Create Tender Project

This chapter covers the entry of the information that is used to generate the cover page of the advertised tender package: that being the Tender Project. The external consultant creates the Tender Project(s) as part of creating the Tender Document. The Project Administrator role reviews projects on the Tender Projects tab. The Engineer/Tech from Professional Services will verify that the text used adequately describes the work to be performed.

Topics in Chapter:

1. Tender Project Background
2. Tender Projects Tab
3. Add Project
4. Add Location
5. Add Limit
6. Save Tender Project

Tender Project Background

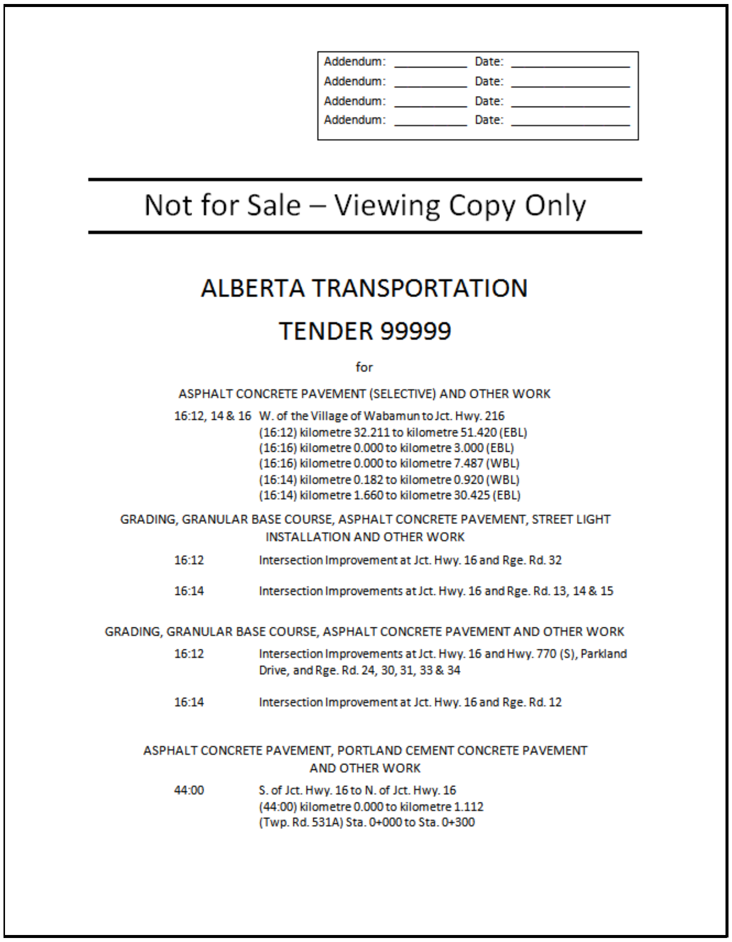
The Tender Projects tab provides the user with the ability to create and update Tender Project information. The tender project information describes the types of work to be performed and the locations. Although the projects and work activities coming to PMA Delivery from Rationalization & Optimization Decision Application (RODA) provide work types and locations, there is not an adequate level of detail for tenders.

We will look at the steps performed by the External Consultant in creating the Projects, Locations and Limits that may be required to adequately define the work requirements of a tender.

When a Professional Services - Tender Services user prepares the Tender package for advertisement, they include a letter, cover page, detailed design documents, a Unit Price Schedule, etc. The information entered on the Tender Projects tab is used to build the cover page. Therefore, building the Tender Projects prior to generating the Tender Document is important for external consultants.

Figure 12.1 below, portrays an example of a cover page and where we are headed with the Tender Projects tab.

Figure 12.1 Tender Projects - Cover Page example



Addendum:	________	Date:	____________
Addendum:	________	Date:	____________
Addendum:	________	Date:	____________
Addendum:	________	Date:	____________

Not for Sale – Viewing Copy Only

ALBERTA TRANSPORTATION

TENDER 99999

for

ASPHALT CONCRETE PAVEMENT (SELECTIVE) AND OTHER WORK

16:12, 14 & 16 W. of the Village of Wabamun to Jct. Hwy. 216
(16:12) kilometre 32.211 to kilometre 51.420 (EBL)
(16:16) kilometre 0.000 to kilometre 3.000 (EBL)
(16:16) kilometre 0.000 to kilometre 7.487 (WBL)
(16:14) kilometre 0.182 to kilometre 0.920 (WBL)
(16:14) kilometre 1.660 to kilometre 30.425 (EBL)

GRADING, GRANULAR BASE COURSE, ASPHALT CONCRETE PAVEMENT, STREET LIGHT INSTALLATION AND OTHER WORK

16:12 Intersection Improvement at Jct. Hwy. 16 and Rge. Rd. 32

16:14 Intersection Improvements at Jct. Hwy. 16 and Rge. Rd. 13, 14 & 15

GRADING, GRANULAR BASE COURSE, ASPHALT CONCRETE PAVEMENT AND OTHER WORK

16:12 Intersection Improvements at Jct. Hwy. 16 and Hwy. 770 (S), Parkland Drive, and Rge. Rd. 24, 30, 31, 33 & 34

16:14 Intersection Improvement at Jct. Hwy. 16 and Rge. Rd. 12

ASPHALT CONCRETE PAVEMENT, PORTLAND CEMENT CONCRETE PAVEMENT AND OTHER WORK

44:00 S. of Jct. Hwy. 16 to N. of Jct. Hwy. 16
(44:00) kilometre 0.000 to kilometre 1.112
(Twp. Rd. 531A) Sta. 0+000 to Sta. 0+300

Business Rules

For the purposes of clarity in this guide, the term *Tender Project* will be used to indicate projects created on the Maintain Tenders screen in the Tender Projects tab versus the term *Project* which would indicate the projects developed through RODA.

The following assumptions will help clarify some of the business rules for Tender Projects:

- A Tender can exist without a Project
- A Tender does not have a Primary Project
- A Project can exist without a Location

Alert! The Tender Project must be created before the Tender Document is advertised.

Create Tender Projects Process

The following list attempts to show the levels for each element that may be included in a Tender Project.

- Add Project
  - Add Location
    - Add Limit

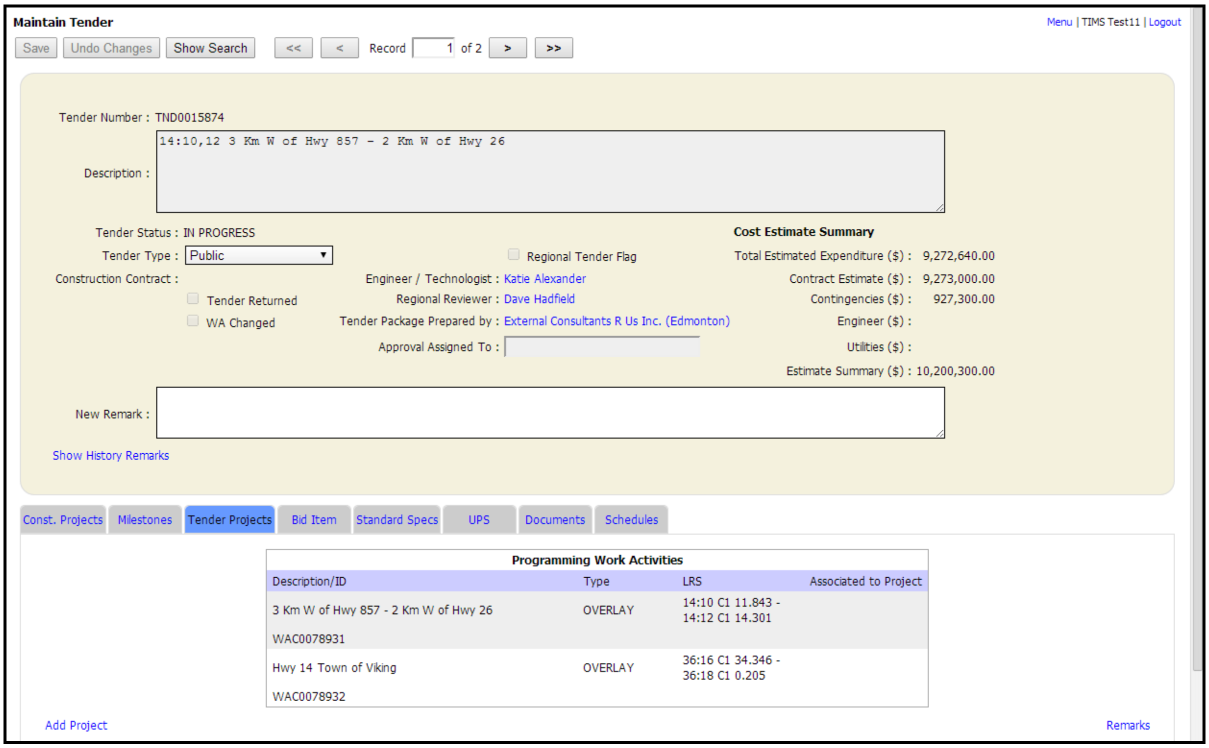
Hint:	Linear Referencing System ‘Kilometre points’ and ‘Stations’ use different formats to mean the same thing. (i.e. kilometre 3.232 is the same as Sta. 3+232).

External consultants will initially create the Tender Projects. The Regional Reviewer will review and potentially edit the Tender Projects tab. Professional Services - Tender Services has the final opportunity to edit the Tender Projects tab.

Tender Projects Tab

The Tender Projects tab on the Maintain Tender screen provides the External Consultant with the ability to build Tender Projects. A Tender Project can have up to three levels: the Project, the Location(s) of the Project and then the Limit(s) within each Location. This is also the order that a Tender Project is created. You cannot enter a Location until you have a Project and you cannot enter a Limit until you have a Location.

Figure 12.2 Maintain Tender screen – Tender Projects tab blank



The information displayed in the Programming Work Activities area comes from a combination of the work activities listed on the Construction Projects tab and the work activity information available on the Maintain Work Activities screen. Although the language used is understood by Alberta Transportation staff, the same is not always true for external companies. For this reason the Projects need to be re-worded in such a way that any construction company will understand the work involved. This is the purpose for the Tender Projects tab.

Hint: Consultants, Project Administrators, and the Engineer/Tech can enter Tender Projects.

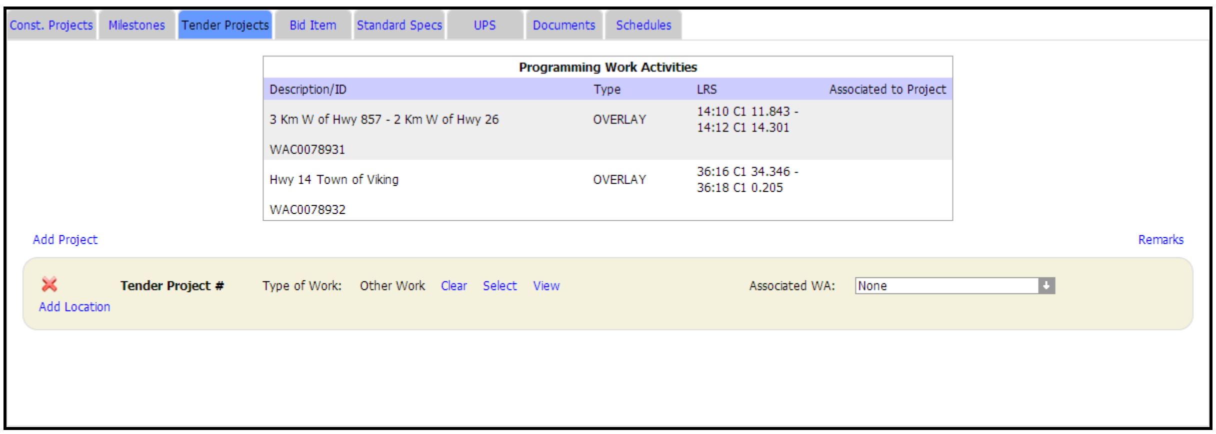
Add Project

The Add Project link will always insert a new Project at the top of the Tender Projects list. The main outcome of building the list of Tender Projects is so that the cover page of the advertised Tender Package can be generated. Therefore, to save yourself some time, add the Projects in reverse order to how you want them to appear on the cover page.

Hint: Add Projects by starting at the bottom of what will be the Cover Page.

An external user with the Data Entry role can add projects to a tender.

Figure 12.3 Tender Projects tab – Add Project example

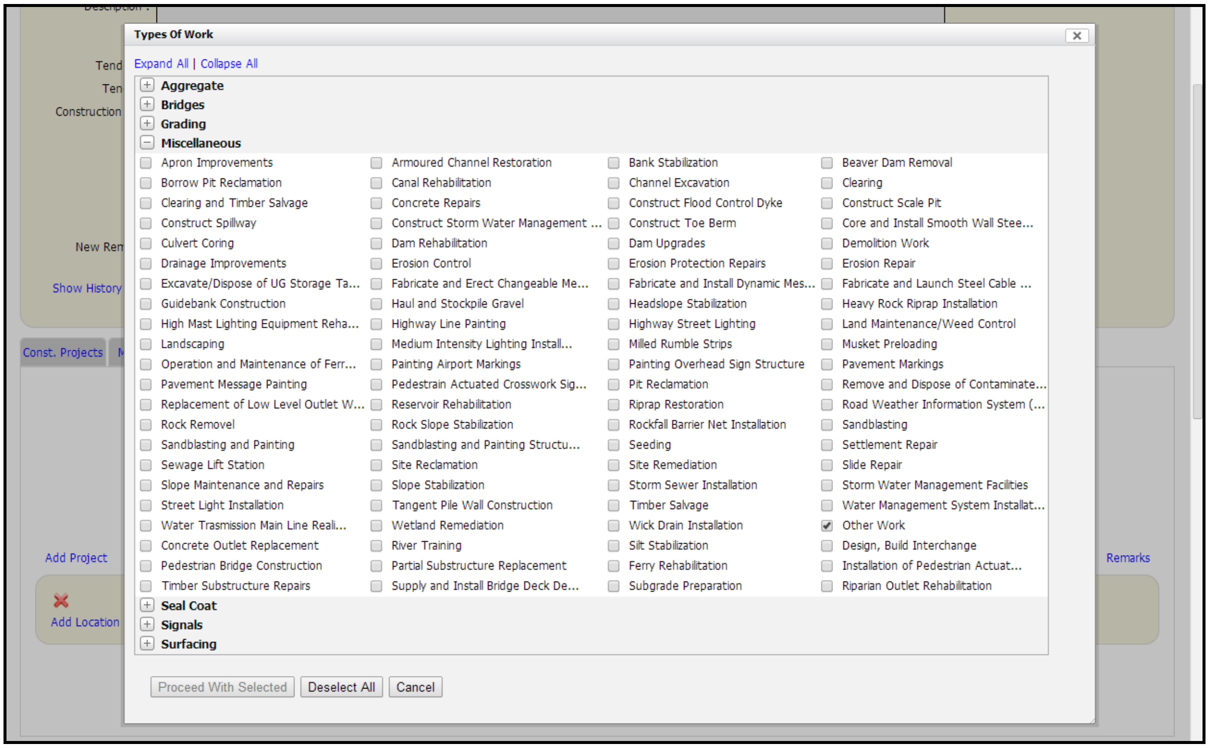


Alert! Save the Maintain Tender screen to save any changes on the Tender Projects tab.

Type of Work

Using the Type of Work window, check all of the types that are applicable for the Project being added. The Type 'Other Work' is checked by default and should always appear in the list of work types.

Figure 12.4 Tender Projects tab – Add Project Type of Work



Hint: Check all of the Work Types that are applicable.

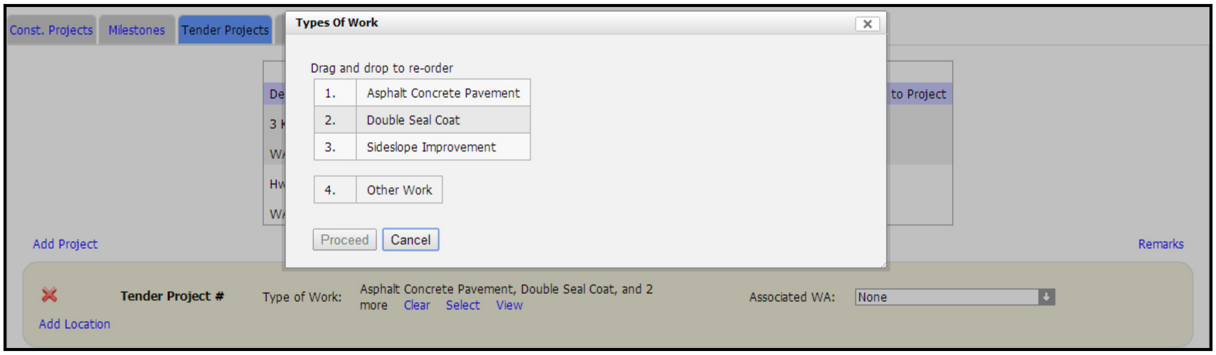
Hint: If a Work Type is not available and should be added to the list; contact Professional Services - Tender Services. They have the authority to add new Work Types.

Type of Work Order

After checking the work types from the Type of Work list you may need to re-order the types to match the priority of work in the project. The View link will open a window that allows you to drag and drop the Types into the required order.

Notice in Figure 12.5 below, that Asphalt Concrete Pavement comes first, followed by Double Seal Coat. In Figure 12.6 Double Seal Coat has been dragged above Asphalt Concrete Pavement.

Figure 12.5 Tender Projects tab – Add Project Type of Work - Order



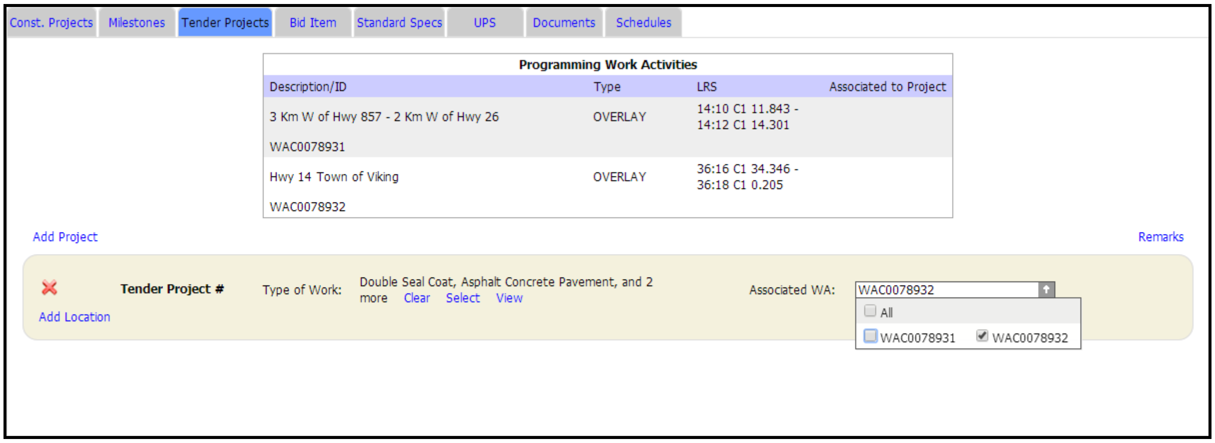
Hint: Drag and Drop Work Types into the proper order. The order is typically determined by the logical sequence of events.

Figure 12.6 Tender Projects tab – Add Project Type of Work - Re-Ordered

Associated Work Activity

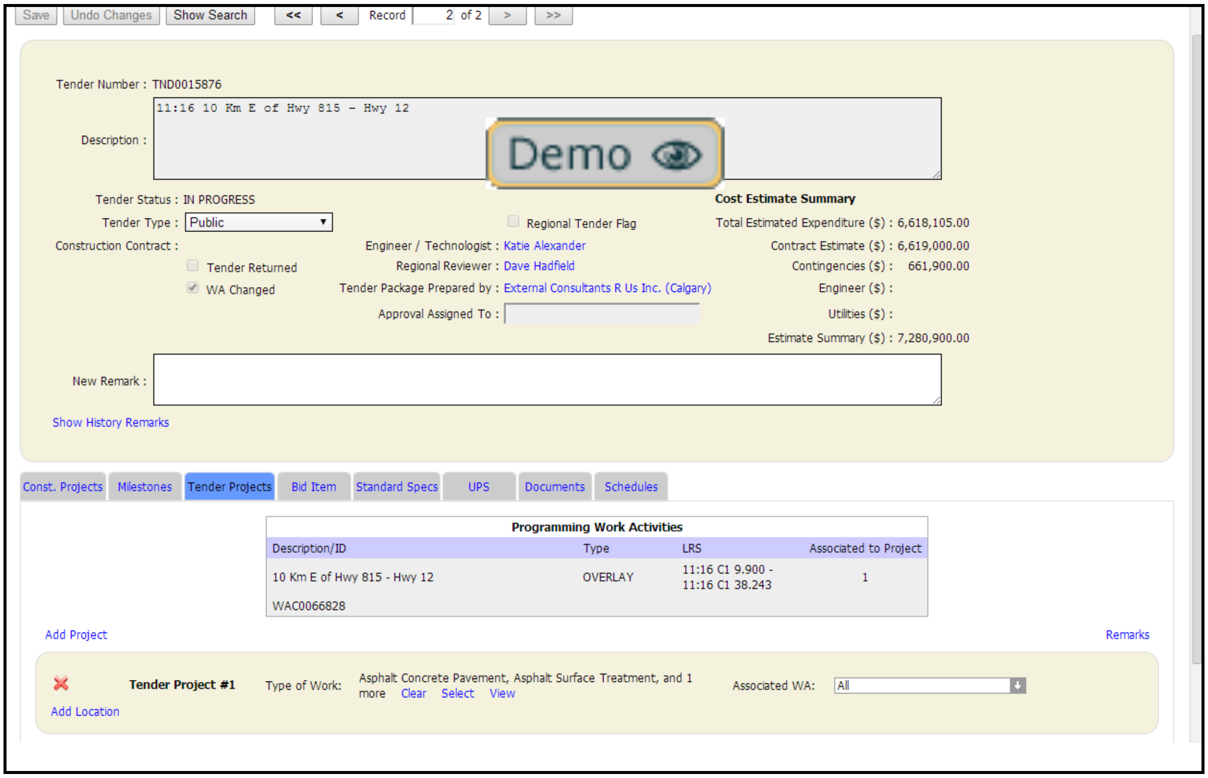
Using the Associated Work Activity drop down, check all of the WAC IDs that are applicable for the Project being added. The Work Activities listed are the same as in the Programming Work Activities area, which are the same as the Work Activities listed on the Construction Projects tab.

Figure 12.7 Tender Projects tab – Add Project Associated WA



Hint: Check all of the Work Activities that are applicable.

Demo 12.1 Add a Tender Project



How To

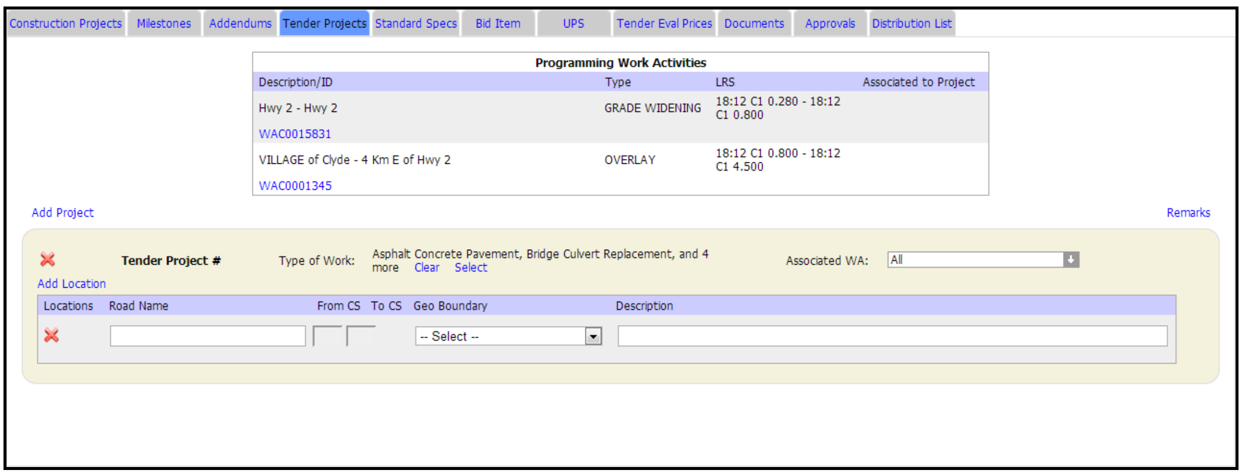
1. From the *Maintain Tender* screen select the **Tender Projects** tab.
2. From the *Tender Projects* tab select the **Add Projects** link.
3. Click the **Select** link for the *Type of Work* field.
4. From the *Types of Work* window check all **Work Types** that are applicable to the project.
5. Select the **Proceed With Selected** button.
6. Click the **View** link.
7. From the *Types of Work* window drag and drop **Work Types** to order as required.
8. Select the **Proceed** button.
9. From the *Associated WA* drop down check all **Work Activities** applicable to the project.
10. From the *Maintain Tender* screen select the **Save** button.

Add Location

The Location defines where the work is to take place. This can be either a road and control section or a geographic boundary (region or district). Each project can have one or more locations.

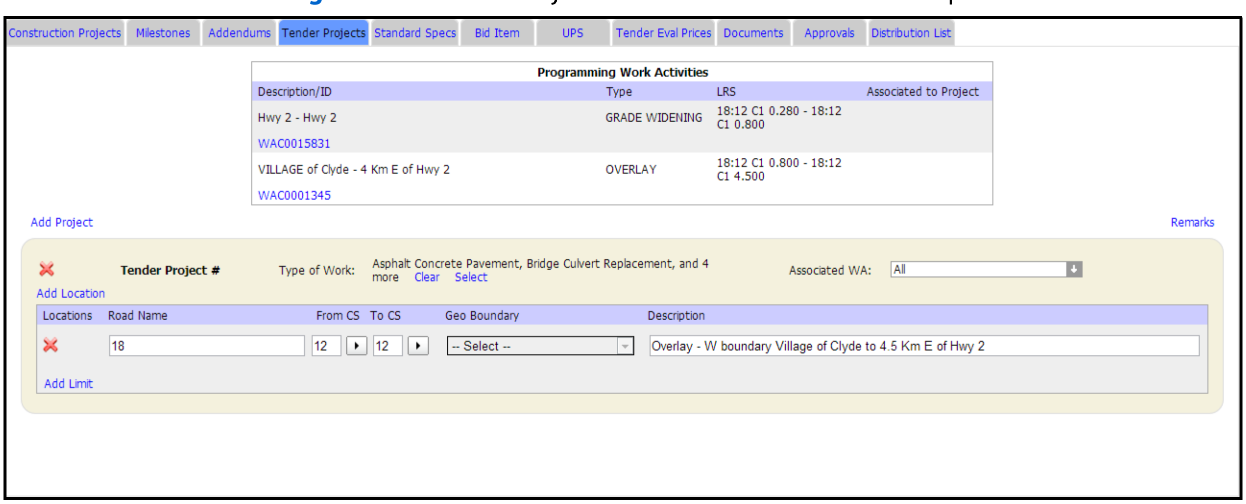
Hint: A Location can use either a Road or Geo Boundary - but not both.

Figure 12.8 Tender Projects tab – Add Location example



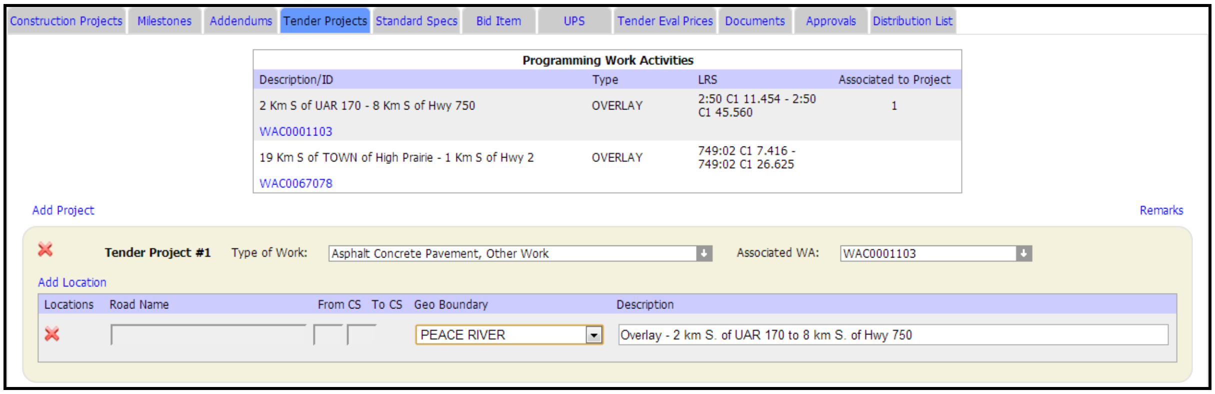
All of the Location information appears on the cover page of the tender document. The description is particularly important in describing where on the road or within the boundary the work will take place.

Figure 12.9 Tender Projects tab – Add Location Road example



When the location is defined by a road, the ability to further define the location with limits is available.

Figure 12.10 Tender Projects tab – Add Location Geo Boundary example



When the location is defined by a boundary, limits are not required.

Tender Projects for Bridges

Figure 12.11 and Figure 12.12 below, show the incorrect and the proper method of entering the Location for bridge work.

Figure 12.11 Tender Projects tab – Add Location for Bridge Incorrect example

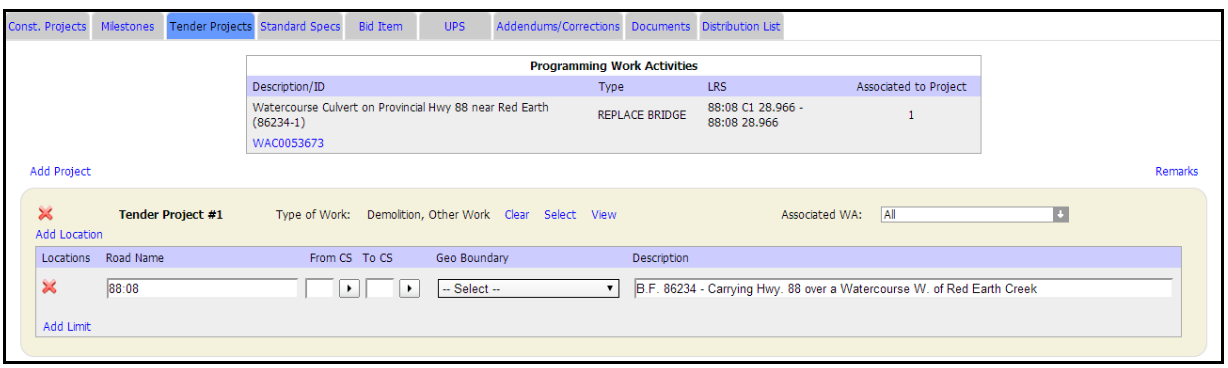
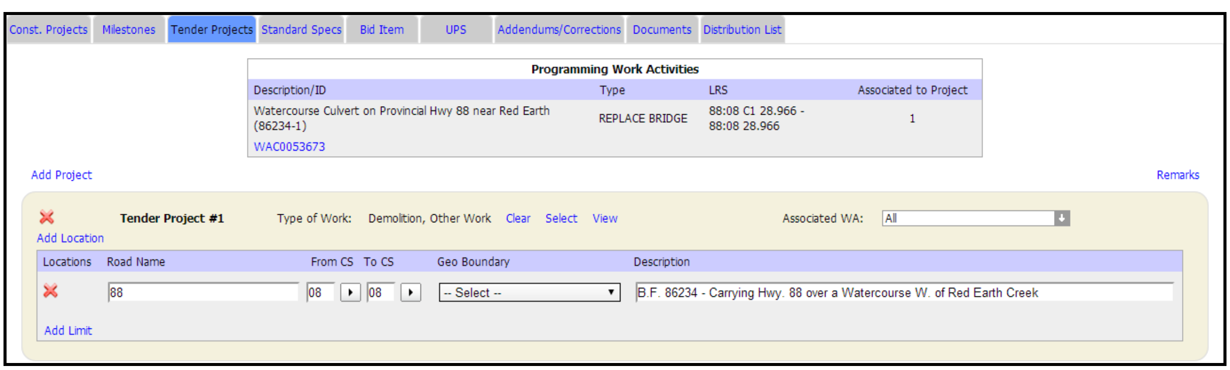
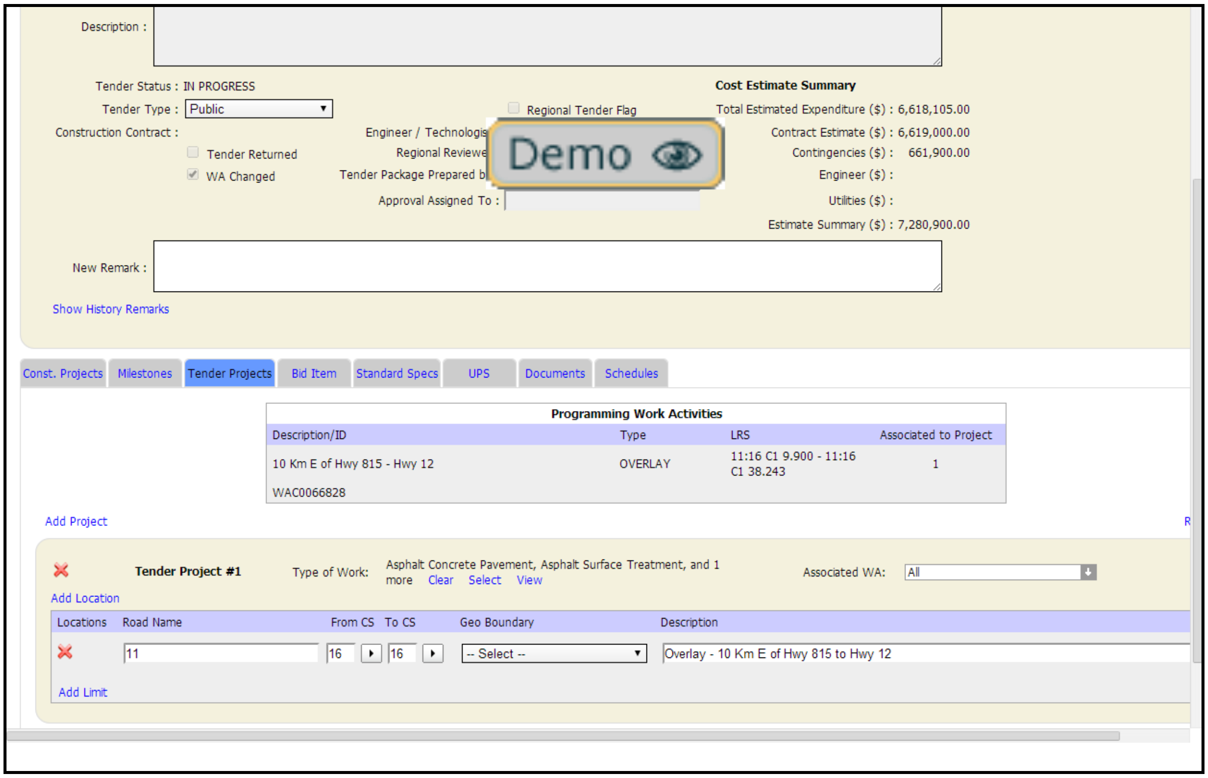


Figure 12.12 Tender Projects tab – Add Location for Bridge Correct example



Demo 12.2 Add Locations to a Tender Project



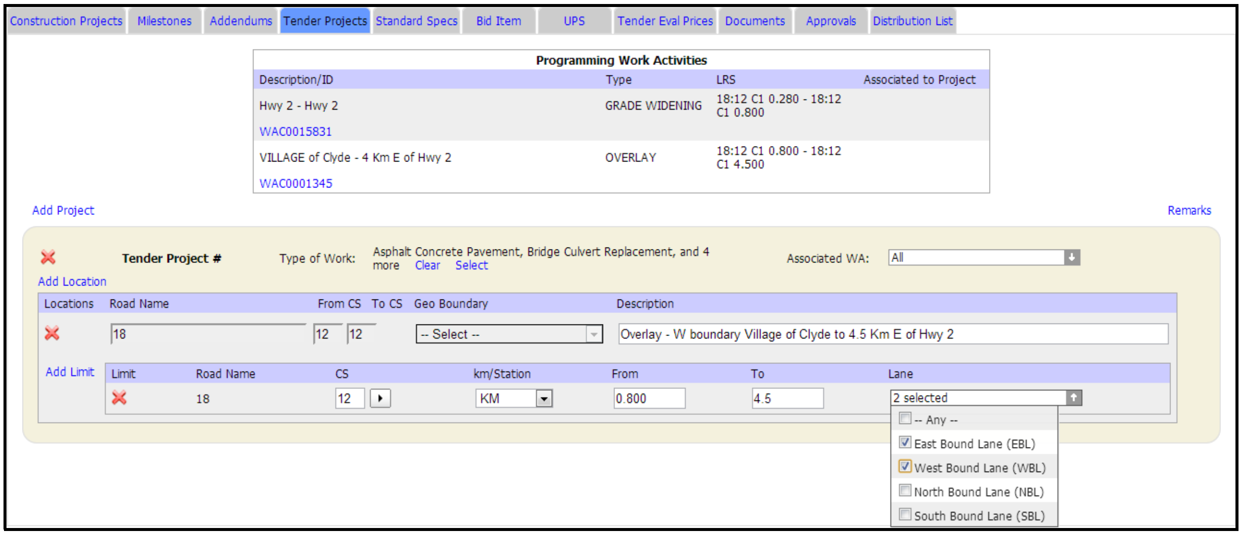
How To

1. From the *Tender Projects* tab select the **Add Location** link.
2. Type a **Road Name** with **From** and **To** control sections OR select a **Geographic Boundary**.
3. Type a **Description** to clarify the Location of the work.
4. From the *Maintain Tender* screen select the **Save** button.

Add Limit

Adding one or more Limits is only available when Road Locations are used. Limits further define where the work is to take place. For example, multiple limits would be entered to define non-continuous segments within a control section (i.e. km 0 - 2.752, 5.007 - 10.053, etc.).

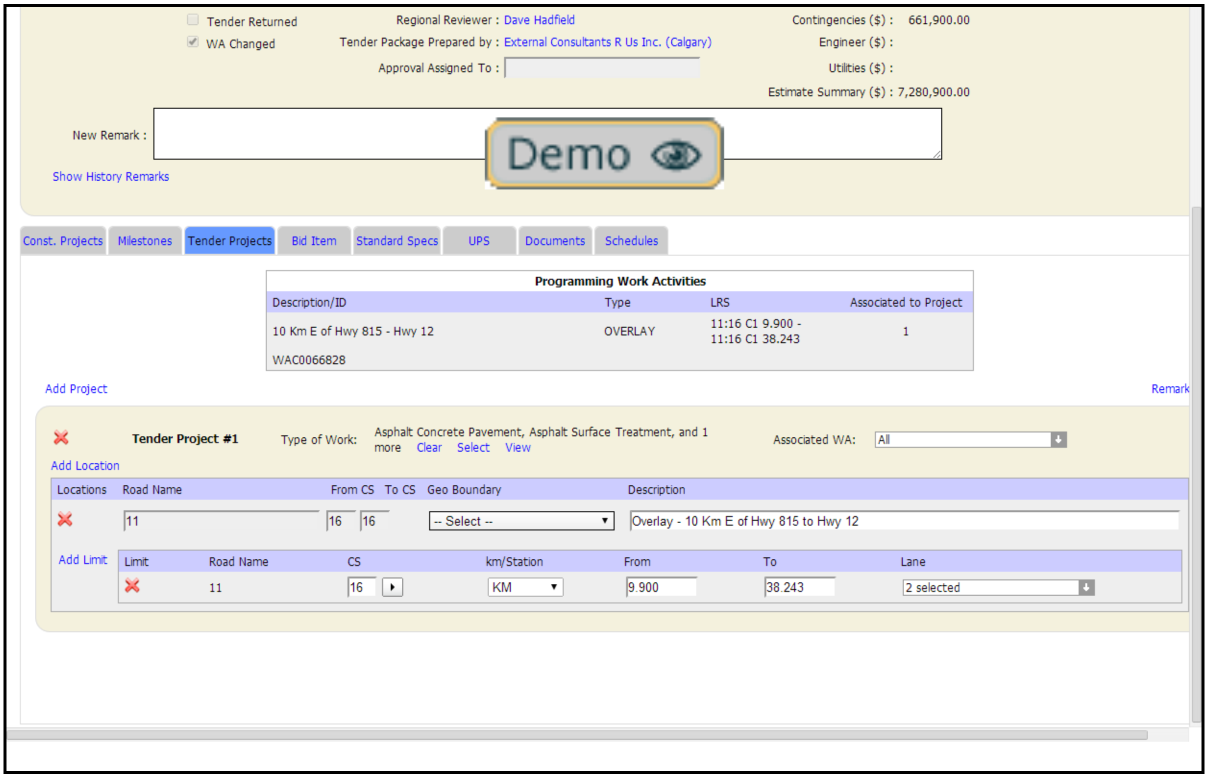
Figure 12.13 Tender Projects tab – Add Limit example



Hint: Unless only one direction is being worked on or there is a substantial difference in length between one lane and the other, specifying the lane is not necessary.

Hint: There is no Limit when Geo Boundary is selected as the Location.

Demo 12.3 Add Limits to a Tender Project



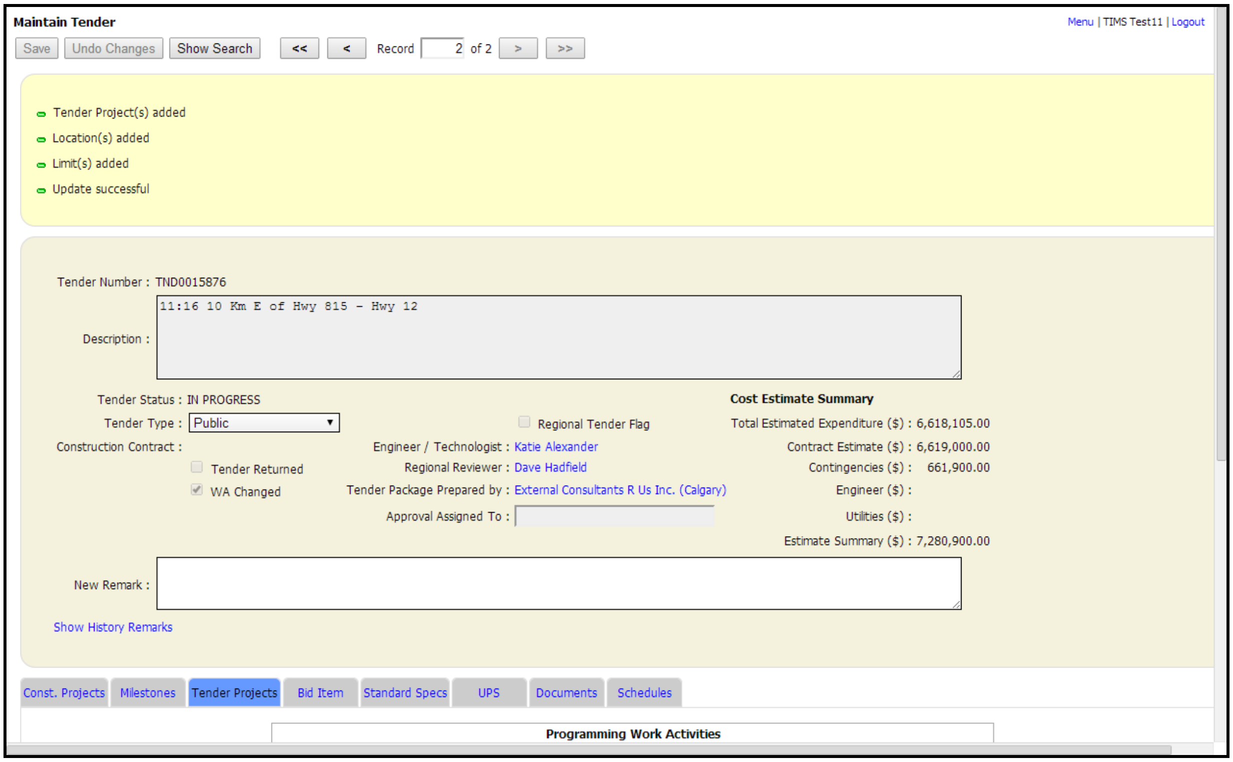
How To

1. From the *Tender Projects* tab select the **Add Limit** link.
2. In the **CS** field enter the Control Section number.
3. From the **km/Station** drop down select the appropriate unit of measure.
4. Enter **From** and **To** values appropriate for the km/Station type selected.
5. From the **Lane** drop down check the lanes affected.
6. From the *Maintain Tender* screen select the **Save** button.

Save Tender Project

In summary, the information entered on the Tender Projects tab is used to build the Cover Page of the Tender Document. The Save button on the Maintain Tender screen must be selected to save the work done on the Tender Projects tab.

Figure 12.14 Tender Projects tab – Saved Tender Project confirmation



Tender Projects to Cover Page Cross Reference

Comparing the two figures below you should be able to see how the information entered in PMA ends up in the Tender Document.

Figure 12.15 Tender Projects tab – Tender Projects example

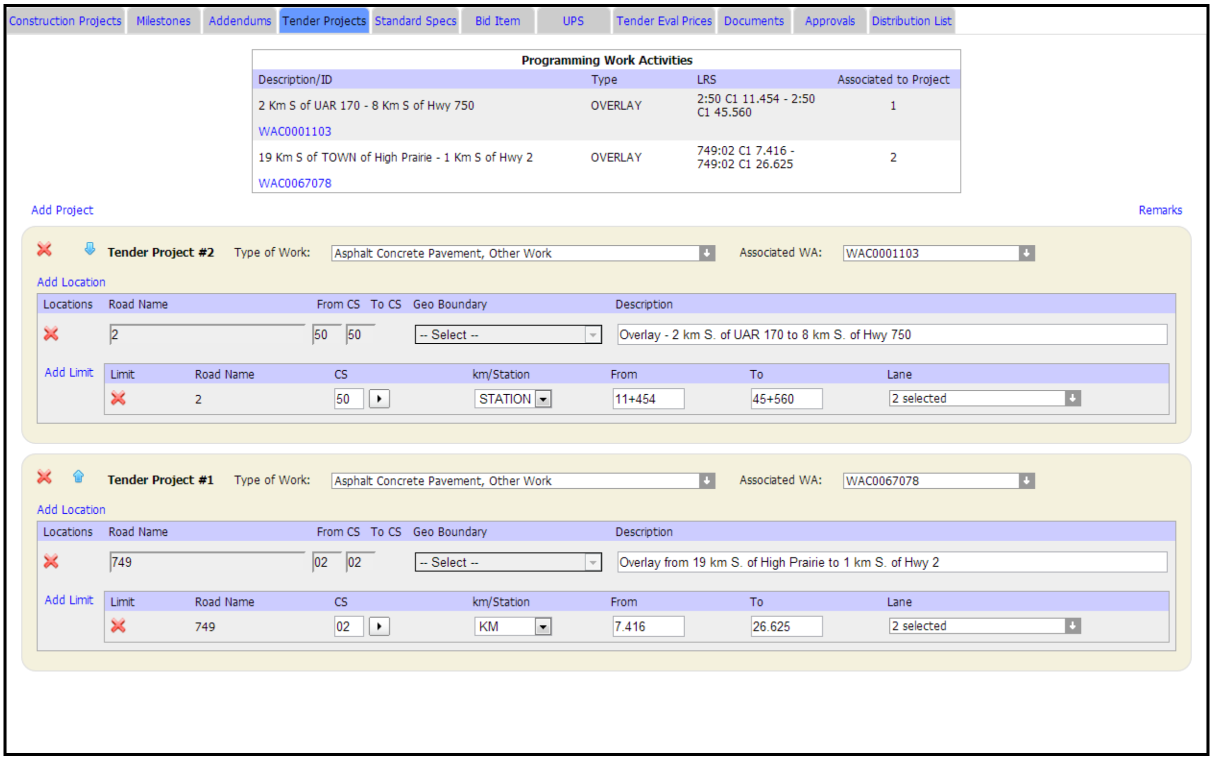


Figure 12.16 Tender Projects – Cover Page example

ALBERTA TRANSPORTATION
TENDER 0015326

for

Asphalt Concrete Pavement AND Other Work

2:50 Overlay – 2 km S. of UAR 170 to 8 km S. of Hwy 750
station 11+454 to 45+560(EBL,WBL)

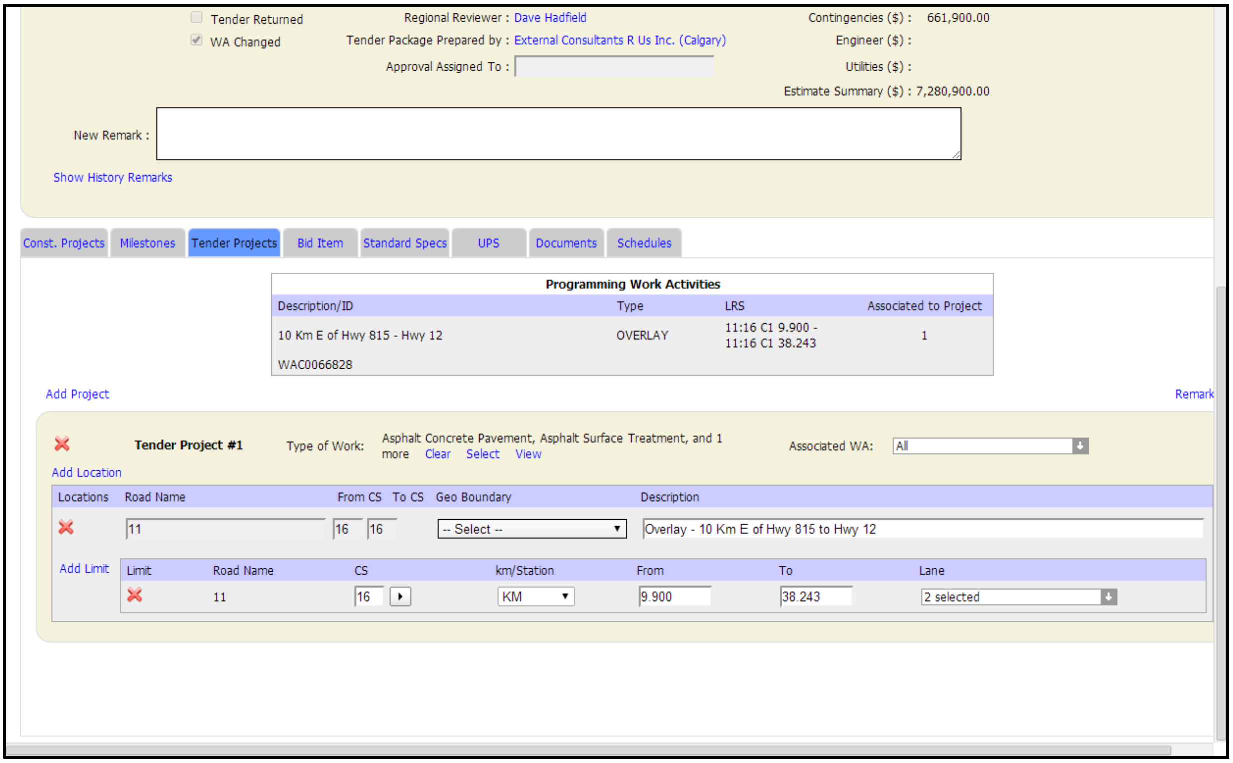
Asphalt Concrete Pavement, AND Other Work

749:02 Overlay from 19 km S. of High Prairie to 1 km S. of Hwy 2
kilometre 7.416 to 26.625(NBL,SBL)

Remove Tender Projects

To edit a project, you may have to remove a subordinate element (i.e. Limit) before you can change a parent element (i.e. Location). However, in most cases clicking the remove button will remove that item and any subordinate item(s).

Figure 12.17 Tender Projects tab – Saved Tender Project



Chapter 13: Create UPS Evaluation Format

As there can be many different methods of accomplishing the same result, multiple Unit Price Schedule Sections are created. When a tender contains more than one UPS Section, Evaluation Price Combinations are required. Creating the Evaluation Price Combinations is a process performed by the External Consultants and reviewed by Professional Services - Tender Services users.

Topics in Chapter:

Add Evaluation Price Combination

If the Tender has only one Unit Price Schedule (UPS) Section there is no need to create an Evaluation Price Combination. When multiple UPS Sections are created (UPS tab), then defining Pricing Combinations is required. Once the Unit Price Schedule Sections have been entered, creating the combination of those schedules can be performed on the UPS Evaluation Format tab.

Hint: If the UPS Sections were just created during the users' login session, the Internet Browser may need to be refreshed for the UPS Evaluation Format tab to display.

Alert! Evaluation Price Combinations cannot be added once the first Bidder has been entered.

Figure 13.1 below, shows the UPS Sections created on the UPS tab. There are two UPS Sections Labeled A, and B. These are the sections that are listed on the Select UPS Sections window in Figure 13.3 on page 13-3.

Figure 13.1 UPS tab - Available for UPS Evaluation Formats

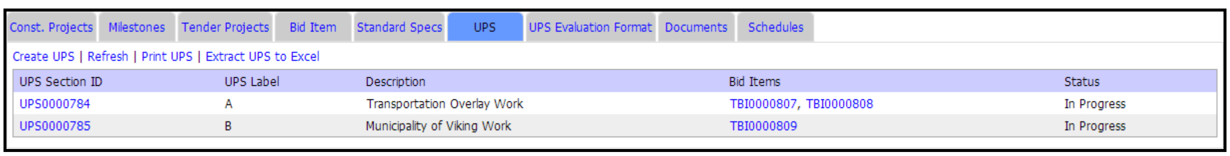


Figure 13.2 UPS Evaluation Format tab - blank

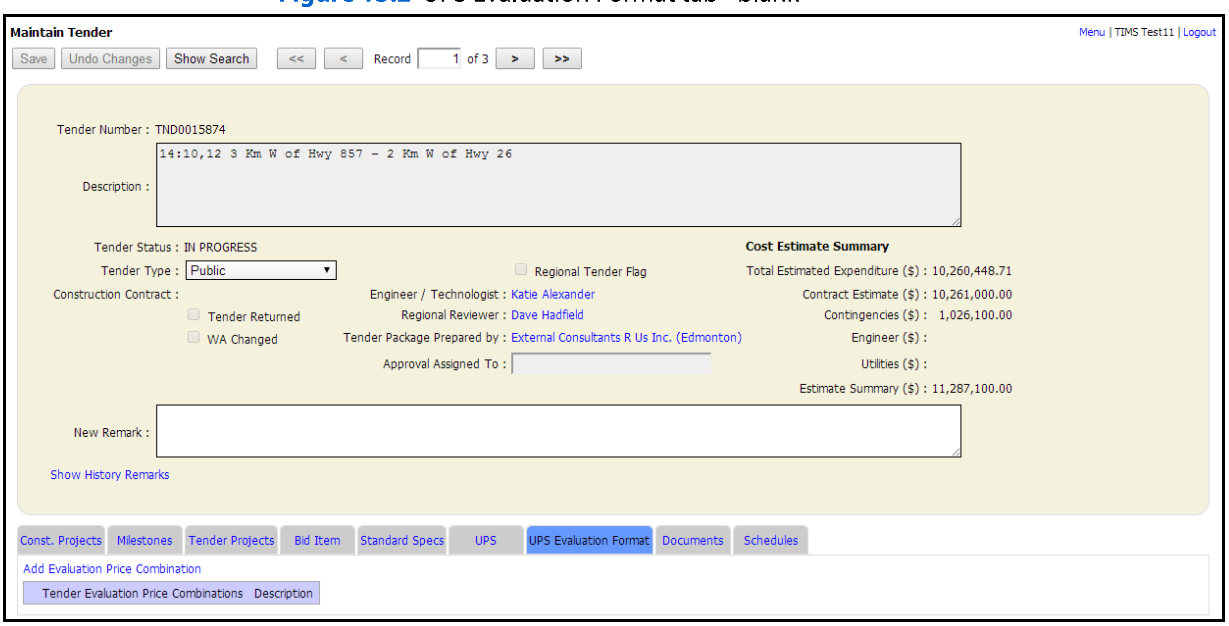
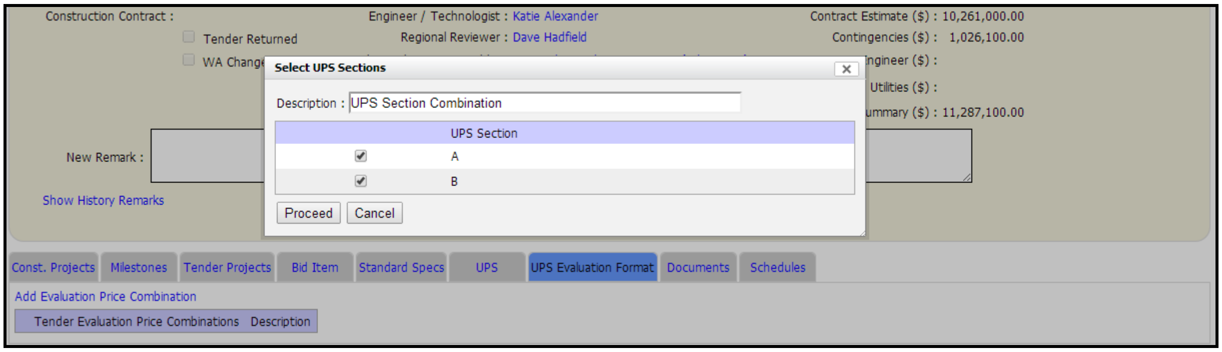


Figure 13.3 UPS Evaluation Format tab - Select UPS Sections window

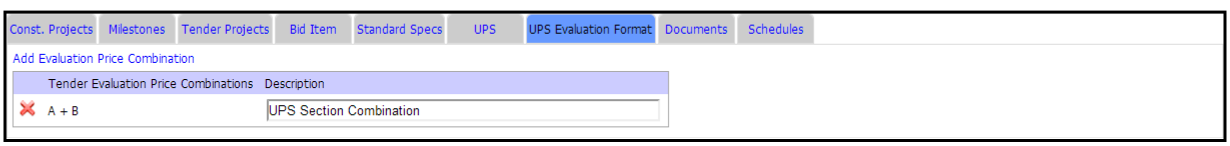


Alert! The Save button on the Maintain Tender screen must be selected to save the Price Combinations created.

How To

1. From the *UPS Evaluation Format* tab select the **Add Evaluation Price Combination** link.
2. From the *Select UPS Sections* window enter a **Description** and check the required sections for the combination.
3. Select the **Proceed** button.
4. From the *Maintain Tender* screen select the **Save** button.

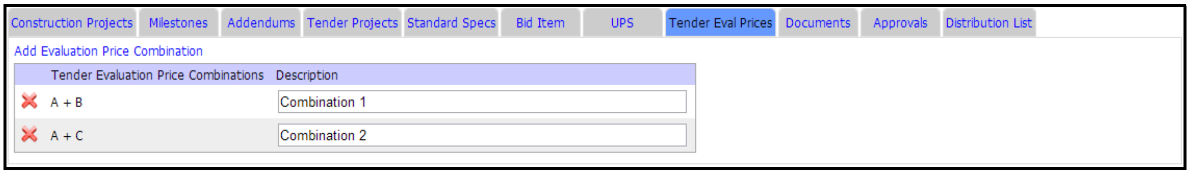
Figure 13.4 UPS Evaluation Format tab - Select UPS Section results



UPS Evaluation Format Dependency

If the UPS Evaluation Format tab is not completed, entering the Tender Advertised 'Actual Date' will result in an error message.

Figure 13.5 UPS Evaluation Format tab -Alternatives



If the UPS Combinations use multiple UPS' and if those UPS' are Alternatives, you will not be able to select both Alternatives in the same Price Combination. For example if Unit Price Schedules B and C are alternatives for each other, then it stands to reason that you can only use one or the other.

Chapter 14: Create Tender Document

The External Consultant has the ability to create Tender Documents. This chapter begins by defining the Documents tab and the links and buttons available. The chapter continues by documenting the processes and steps involved with the functionality of the Documents tab.

Topics in Chapter:

1. Documents Tab
2. Versions
3. Choose File (Attach)
4. Refresh (Document Tab List)
5. Build Document Screen
6. Build New Tender Document
7. Build Tender Document with Multiple UPS Sections
8. Edit Tender Document
9. Choose File (Versions)
10. Refresh (Build Document)
11. Remove File from Documents Tab

Documents Tab

The Documents tab displays files that have been uploaded to PMA Delivery and associated with the Tender. The Choose File button allows the user to upload existing files (xls, doc, pdf, bmp, etc.). The Build New Document link allows the user to create new tender documents using existing templates and the data entered on the Maintain Tender tabs.

Figure 14.1 Maintain Tender screen – Documents tab

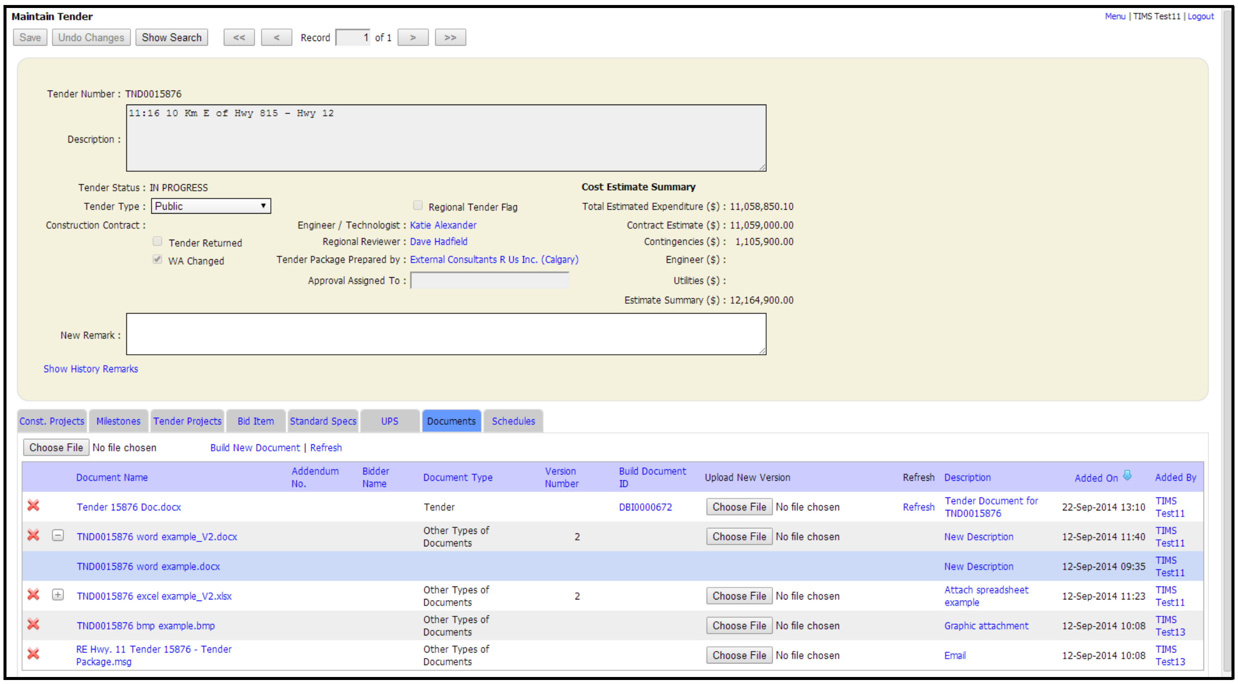


Table 14.1 Maintain Tender screen - Document tab - field definitions

Field	Description
Choose File (button)	This allows the user to select a file on the network and upload it to PMA.
Build New Document (link)	Displays the Build Document screen for building a new document (Tender, Tender Addendum) based on a Template and the Data on the Tender screens.
Refresh (link)	Refreshes the list of files on the Documents tab. Some files (Build Documents) are created on different screens. The Refresh updates the Documents tab.
Document Name	Displays the actual file name (including the file extension).
Addendum No.	When applicable, displays the Addendum Number that the file is associated with (1, 2, 3).
Bidder Name	When applicable, displays the name of the Bidder that originated the file.

Table 14.1 Maintain Tender screen - Document tab - field definitions

Field	Description
Document Type	Displays the Type of document attached. Some files are manually attached and others are automatically added once certain conditions are met (i.e. Bid Report & Bid Results Report).
Version Number	Displays the version of the Build Document (1, 2, 3). Automatically generated when the Refresh link for the individual document is selected.
Build Document ID	Displays the ID of the Build Document (DBI0000001) if available.
Upload New Version	The Choose File button allows the user to replace an existing file with a newer version. The file names must match exactly.
Refresh	Automatically creates a new version for files with a Build Document ID (only).
Description	Displays the textual description of the file as entered by the user. The description is clickable and can be edited.
Added On/By	Displays the date when the file was added and by whom.

Addendum No and Bidder Name

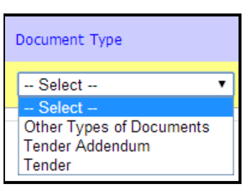
You can select either an Addendum Number or a Bidder Name but not both. An Addendum Number is only available after an addendum has been created (Addendums tab). Bidders are only available after the Bidders have been entered (Bidder List tab).

Document Types

There are several Document Types. Some types are available to consultants when attaching a file (first three) and others that are automatically assigned when files are attached by PMA Delivery or by Tender Administration.

- Other Types of Documents
- Tender Addendum
- Tender
- Contract
- Documents relating to the Tender Approved

Figure 14.2 Documents tab - Document Types - Data Entry role



When the Tender is Approved, the Bid Report and Bid Results Report are automatically added to the Documents tab.

The following sections provide summaries describing some of the key links and buttons of the Documents tab. Each item is covered in more detail later in the chapter.

Choose File (Attach) and Choose File (Versions)

There are two Choose File buttons that can appear on the Documents tab. One is used to attach files to the Tender (i.e. drawings, correspondences, and supporting documents/spreadsheets); while the other is used to add new versions of any file already on the Documents tab.

Refresh (Document Tab List) and Refresh (Build Document)

There are two Refresh links that can appear on the Documents tab. One is used to refresh the list of files on the Documents tab; while the other is only available for Build Documents (has a DBI0000001 ID) and will refresh the build document with any changes made to data on other tender tabs (i.e. Tender Projects, Bid Items, UPS).

Hint: Refreshing the screen naturally occurs when the user closes the Maintain Tender screen or logs out of PMA Delivery.

Build New Document and ReBuild Document

The Build New Document link is used to create new documents based on templates (i.e. Tender Document). Once generated, the document can be edited as necessary.

The Build Document ID link provides the ability to ReBuild the existing document. This could be used if during editing, background elements of the template were unintentionally deleted. The document would be re-generated with the template re-applied. The ReBuild could also be used in the event that the template is changed and if the document needs to have the changes applied.

Alert! ReBuild will reset (overwrite) the Tender Document back to when it was first built.

Versions

There are two buttons on the Documents tab used to add files to the tab: the Choose File button (above the list) and the Build New Document link. These will place the original file versions on the tab. Build New Document is used to create tenders and addendums, whereas Choose File is used to add existing files (DGN, PDF, BMP, DOCX, XLSX, etc.) to the tab.

The Choose File button (in current version row) is used to upload a new version of the file. The button is only available for the current version of the file. This button is used when edits have been made to the file and it is ready to be uploaded into PMA. The button is available for any file except those automatically generated by PMA Delivery.

The Refresh link (in current version row) uses the current version of a Build Document (only) to apply changes made on other Maintain Tender tabs (i.e. Tender Projects, Bid Items, UPS) and generates a new version with the results.

Hint: The Refresh link is only available for Tenders and Addendums (Build Documents).

Hint: New versions can only be created against the ‘current’ version.

Hint: The ReBuild Document button on the Build Document screen will not create a new version.

The editing of files needs to have some level of co-ordination. PMA Delivery will not stop two different people from downloading a Tender Document for editing. For example, if both the consultant and the regional project administrator clicked on the Document Name of the current Tender; they would each have a copy and could each make edits. When both copies were uploaded, neither would include the work done by the other person.

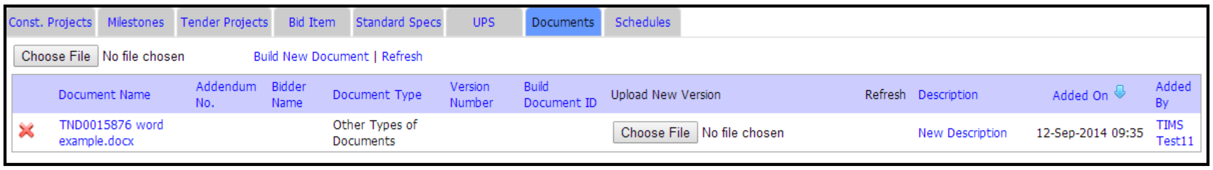
Alert! Updates to tender files must be co-ordinated between consultants, regional project administrators and professional services - tender services.

Choose File (Attach)

The Choose File button on the Documents tab (above the list) allows the user to ‘attach’ existing files to the Tender. The files are uploaded to PMA Delivery and associated with the Tender. The process is almost identical to attaching a file to an email.

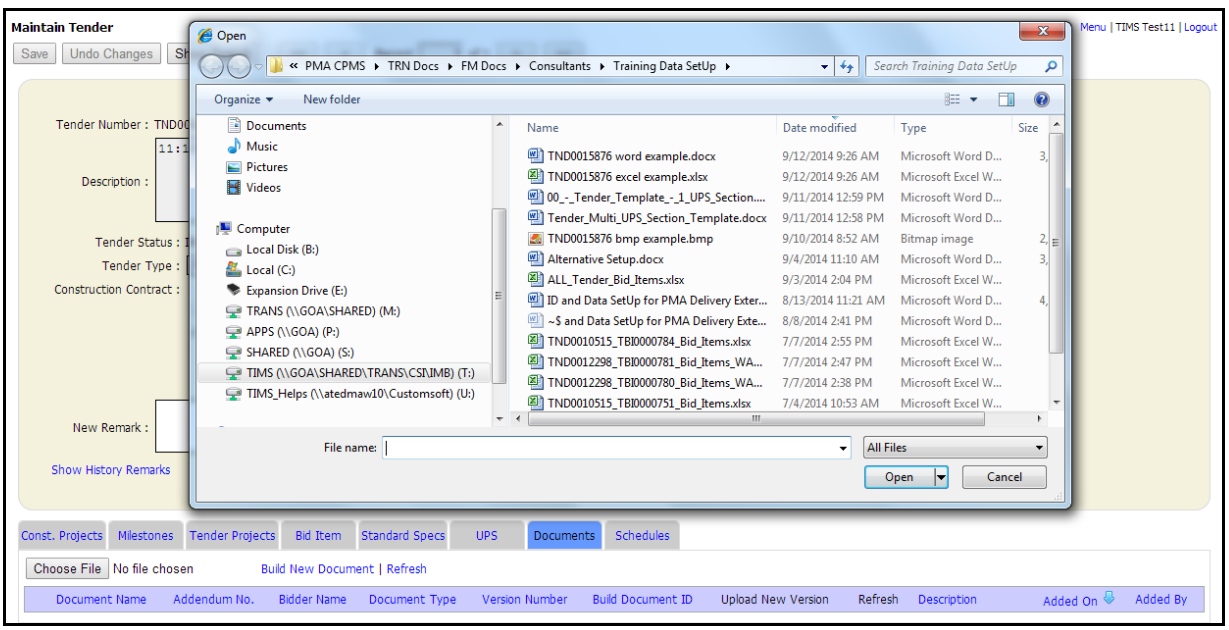
Hint: Attaching a file is like creating an original version of the file.

Figure 14.3 Documents tab – Choose File example



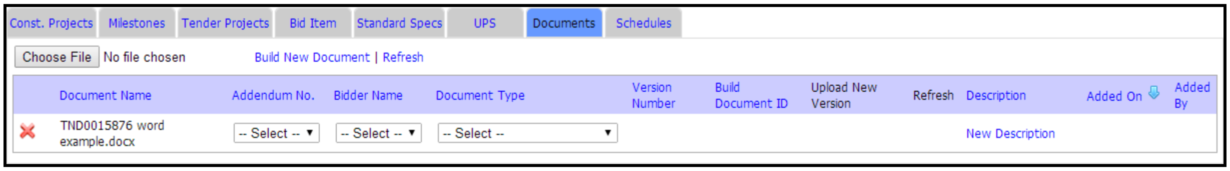
After selecting the Choose File button navigate to where the file is stored.

Figure 14.4 Documents tab – Open File



A Document Type must be selected before saving the Maintain Tender screen. Depending on the Document Type selected, you may need to make other selections in the Addendum No or Bidder Name drop down fields.

Figure 14.5 Documents tab – Uploaded File



Hint: For miscellaneous files added to provide background or support to the tender, you need to specify a Document Type - typically: 'Other Types of Documents'.

Figure 14.6 Documents tab – Document Type File

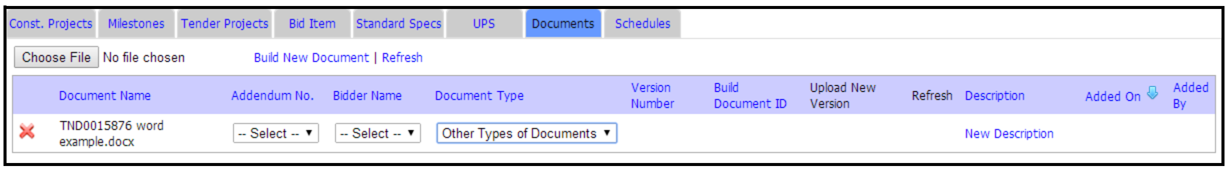
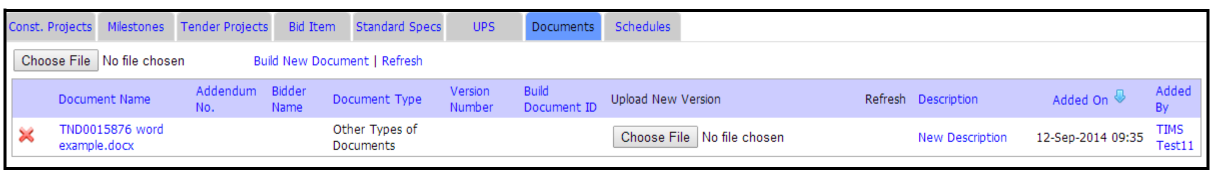
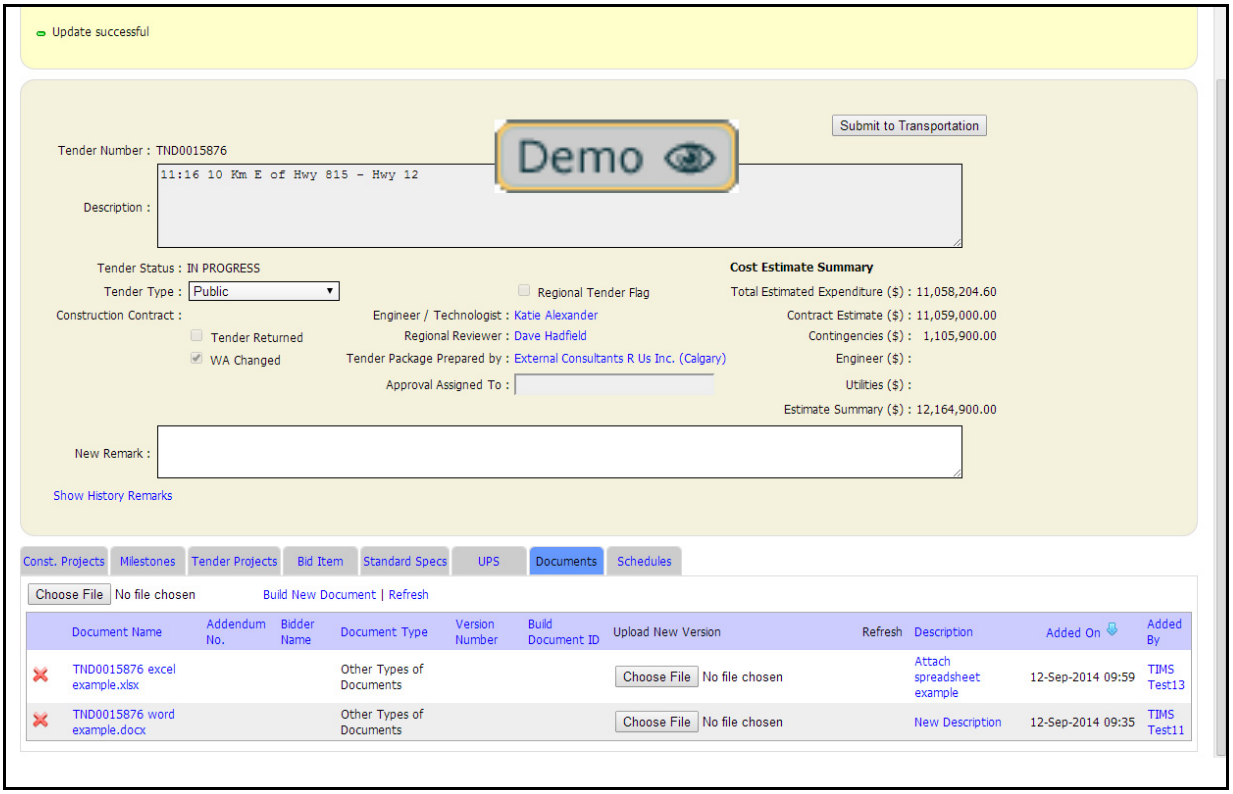


Figure 14.7 Documents tab – Saved File



Hint: Almost any file type can be uploaded to the Documents tab.

Demo 14.1 Attach a File



How To

1. From the *Documents* tab select the **Choose File** button (above the list).
2. From the *Open* window, navigate to the location of the file.
3. Select the file and select the **Open** button.
4. From the **Document Type** drop down select an appropriate type.
5. From the *Maintain Tender* screen select the **Save** button.

Refresh (Document Tab List)

If changes are made on screens away from the Maintain Tender screen and affect the Documents tab, the Refresh link above the list of documents will update the list. For example, when the Build Document link is used to generate the Tender Document, the Refresh will cause the new Tender Document to appear in the list. Figure 14.8 below shows how the Documents tab looked when the Build New Document link was first selected. Since then the Tender Document has been generated. Figure 14.12 shows the results of refreshing the tab.

Figure 14.8 Documents tab – pre-Refresh

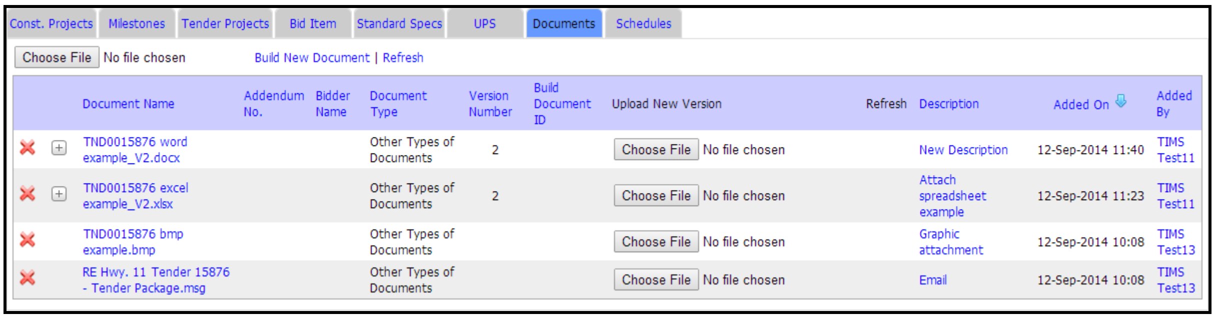
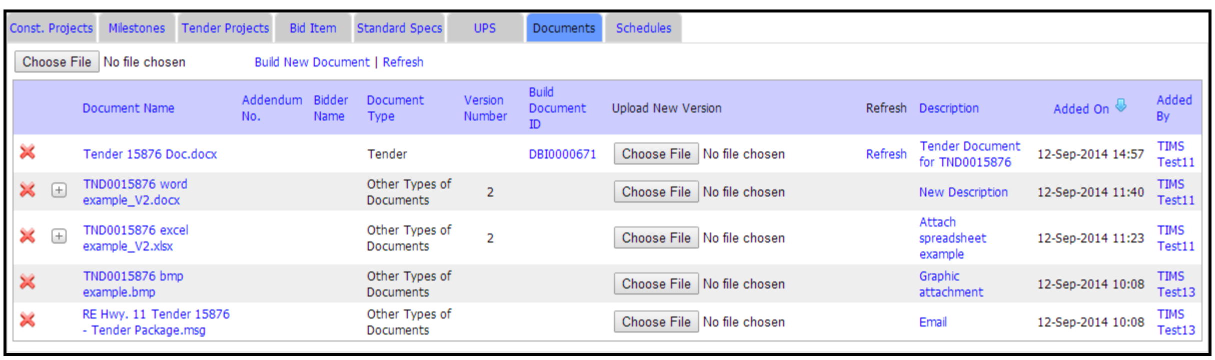


Figure 14.9 Documents tab – post-Refresh



Build Document Screen

The Build New Document link on the Documents tab allows the user to create new tender documents using existing templates and the data entered on the Maintain Tender tabs. This section of the chapter covers the definition of the Build Document screen.

Figure 14.10 Build Document screen - General fields

Table 14.2 Build Document screen - General field definitions

Field	Description
Build Document (button)	This button uses the template(s) selected and the tender data to create a Tender Document.
Tender	Displays the ID of the Tender (TND0000001) that supplies the data.
Tender Description	Displays the description of the Tender (typically the description of the driver work activity).
Build Document ID	Displays the ID of the Build Document (DBI0000001) once available.
Document Type	Displays the Type of document (Tender, Tender Addendum) to be built.
Name	Displays the file name. Used to name the tender document generated. The ‘docx’ extension will be automatically added. Use the Tender ID as the name (e.g. use 15876 for TND0015876).
Data Source	Displays which data fields were selected when the document was created (i.e. Contract fields or Tender fields).

Table 14.2 Build Document screen - General field definitions

Field	Description
Description	Displays the textual description of the file as entered by the user. The description is clickable and can be edited.
Last Build On	Displays the date when the document was last built.
Version Number	Displays the version of the file. Not to be confused with Versions created via Addendums. A file can have multiple versions. New Versions are created on the Documents tab by clicking the Refresh link or the Choose File button for the specific document.
Order	When more than one template is used, displays the order the templates will appear in the document.
Template ID	Displays a unique template identifier that is system generated (DTP0000001).
Template Type	Displays the Template Type selected when the Template was created. Indicates the template used in generating the document.
Name	Displays the Name given to the Template.
Data Source	Displays the type of Data Source that the template is designed to work with.

Alert! Enter the Tender ID as the file Name (i.e. 15876).

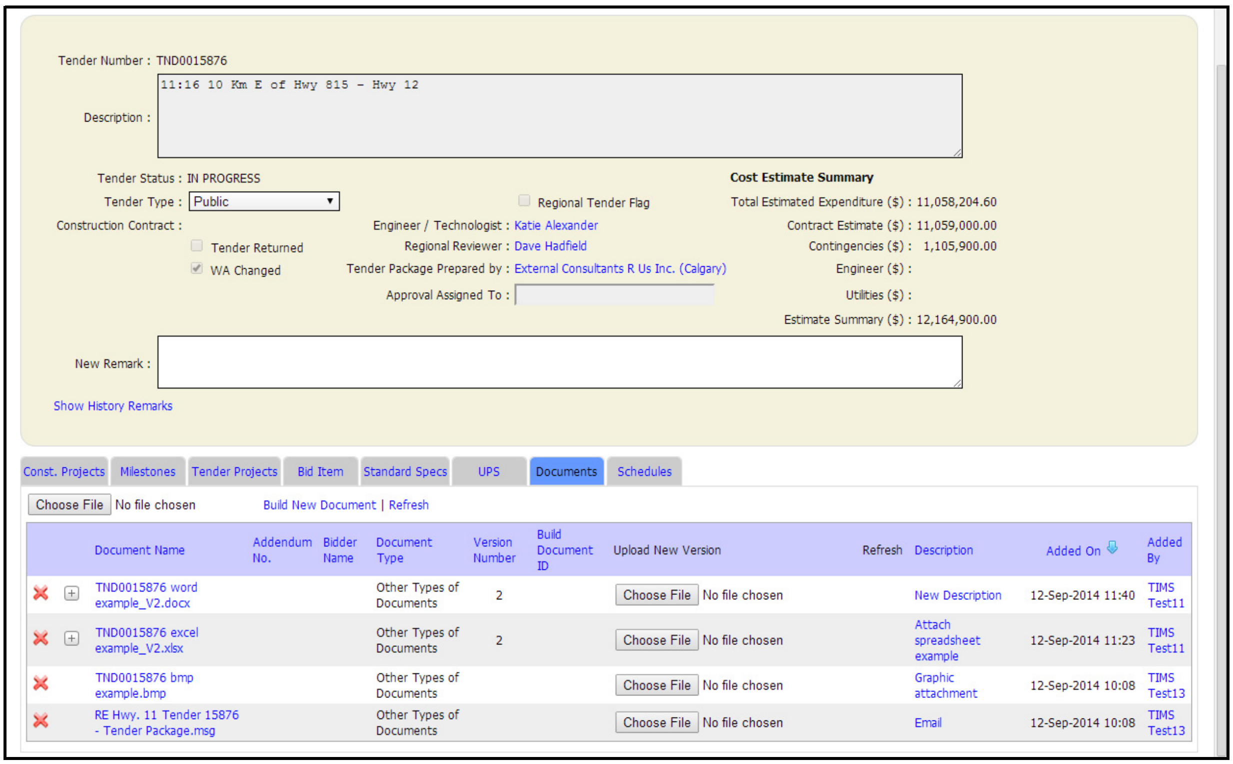
Build New Tender Document

The Build Document screen is used to generate the Tender Document (Tender). The user enters some general information, selects a Template and builds the Document.

Hint: As of this writing Shells were not yet available and only two tender templates are available for selection.

In a future release, the user can select one or more Templates or a Shell. Templates will be individual parts (i.e. cover page template, instructions to bidders template, ups section templates, etc.) and the user will be responsible for selecting and organizing them as necessary. Shells will contain a collection of templates prearranged in the appropriate order.

Figure 14.11 Documents tab - Build New Document link



Alert! Once a Tender has been cancelled or awarded, files can no longer be attached.

In this section of the chapter we will look at generating a Tender Document by using a Template. This process begins with the Build New Document link on the Documents tab. The link opens the Build Document screen in a new tab.

Figure 14.12 Build Document screen - Build Document blank

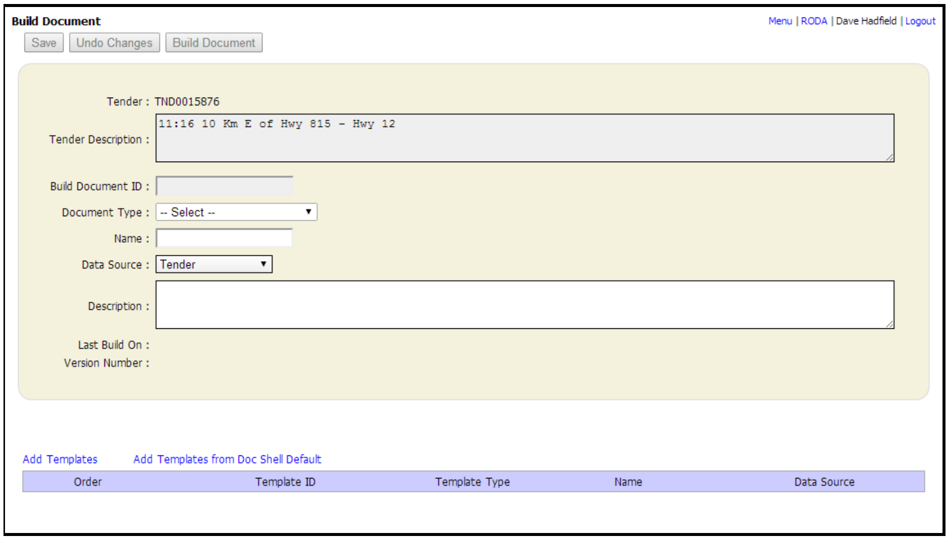
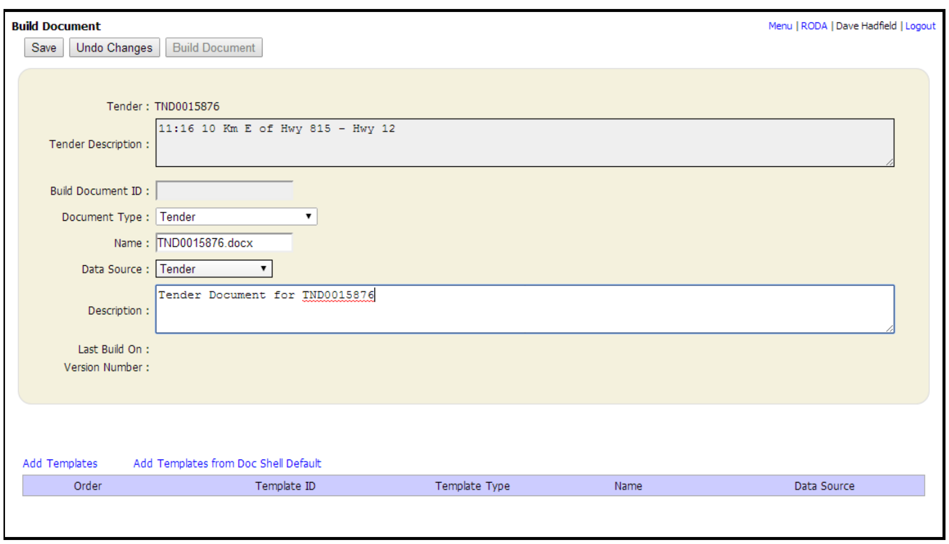


Figure 14.13 Build Document screen - general fields complete



Hint: Use the Tender ID in the Name field.

After the user has entered some general information about the document being built, a template is selected. Templates are created by Professional Services - Tender Services and are selected to build the document.

Alert! Always select **Add Template**. Shells will be made available in a future release.

Figure 14.14 Build Document screen - Add Templates criteria

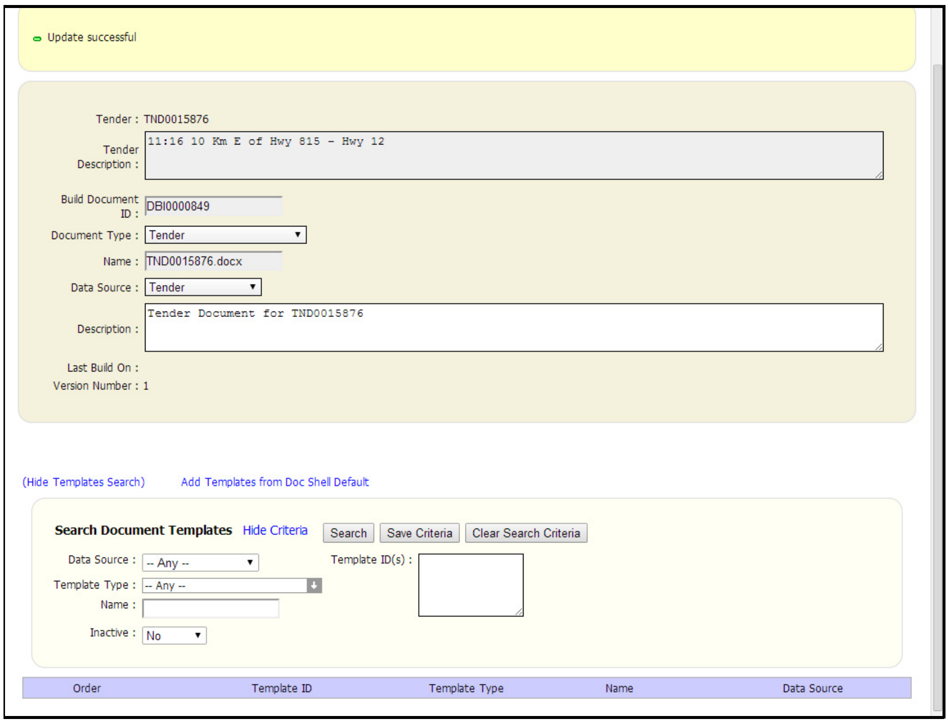


Figure 14.15 Build Document screen - Add Template Selected

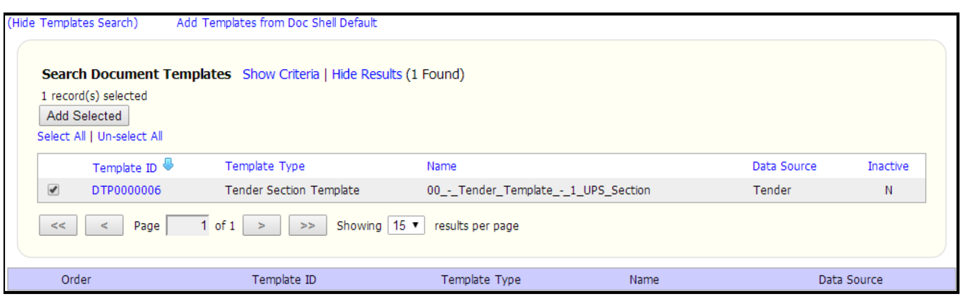
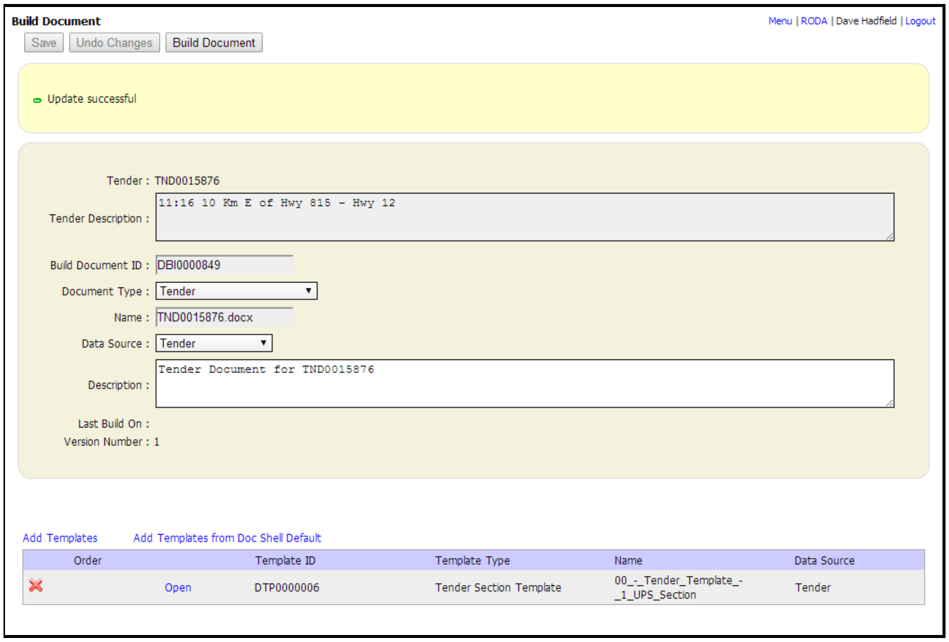


Figure 14.16 Build Document screen - New Build Document settings Saved



Once the required template has been selected and the screen saved, the Build Document button can be used. This will generate a document that will meld the data entered on the Tender screens with the template. The end result is a MS Word document, that is specific to the tender. This tender document can then be further edited by the consultant until it is ready for submission to the regional project administrator.

Figure 14.17 Build Document screen - Tender Document Opened

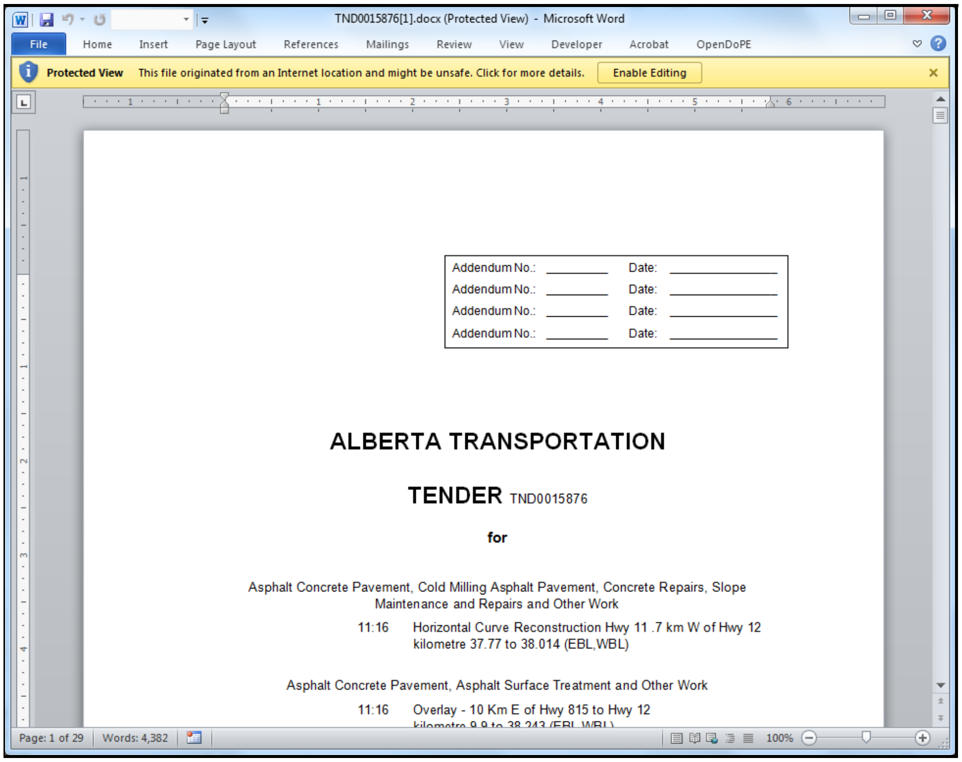
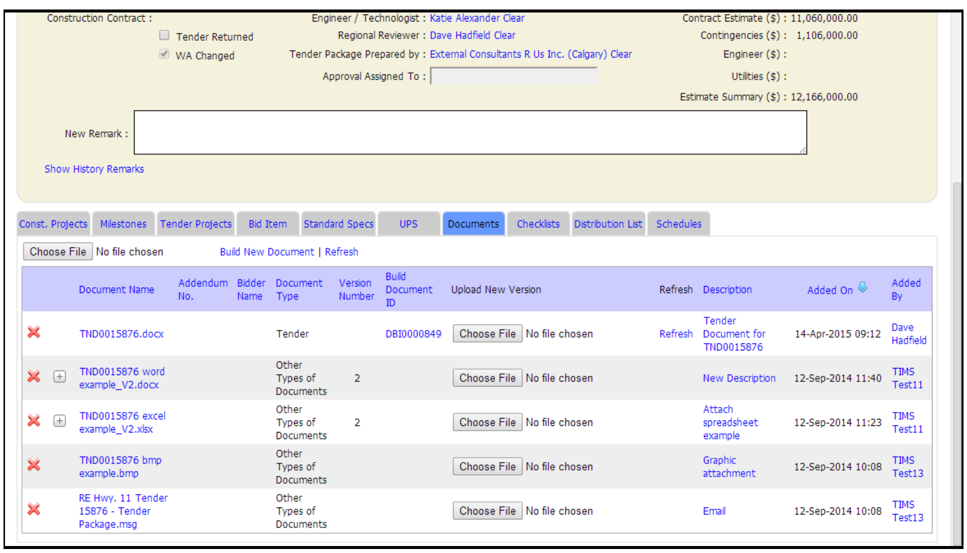
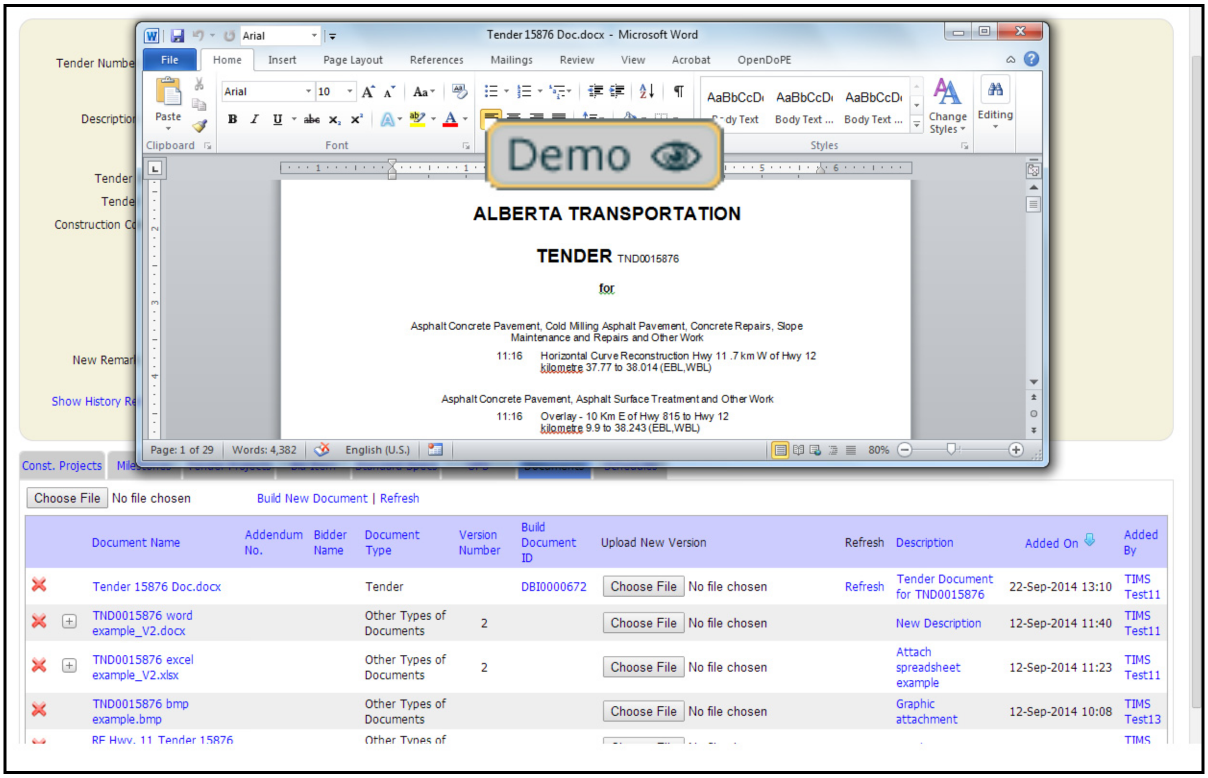


Figure 14.18 Documents tab - Tender Document Listing



Demo 14.2 Build Tender Document



How To

1. From the *Documents* tab select the **Build New Document** link.
2. From the *Build Document* screen select a **Document Type** from the drop down.
3. Type a **Name** for the output file.
4. Type a **Description** for the file.
5. Select the **Add Templates** link.
6. From the *Search Document Templates* area, enter or select criteria.
7. Select the **Search** button.
8. **Check** the required template.
9. Select the **Add Selected** button.
10. From the *Build Document* screen select the **Save** button.
11. Select the **Build Document** button.
12. From the *File Download* window select the **Open** button.
13. Review the *Document* as necessary and **Close** when complete.

Rebuild Document

In the event that Templates are changed or used incorrectly on the Build Documents screen, the document will need to be rebuilt. For example, if the wrong template was used, the user would need to remove the incorrect template, add the correct template and Rebuild the Tender Document.

Figure 14.19 below shows the Tender Document (Tender 15876 Doc_V3.docx). Clicking the Document Name, will open the Word document. However, clicking the Build Document ID (DBI0000671) will open the Build Document screen with the Rebuild button. The Rebuild will use the identified template and the tenders current data, in creating a new tender document. The tender document will automatically open (in Word).

Alert! A Rebuild will not generate a new version of the document but it will replace the current version of the document on the Documents tab. It will in essence overwrite any edits the user may have made.

Figure 14.19 Maintain Tender - Documents tab

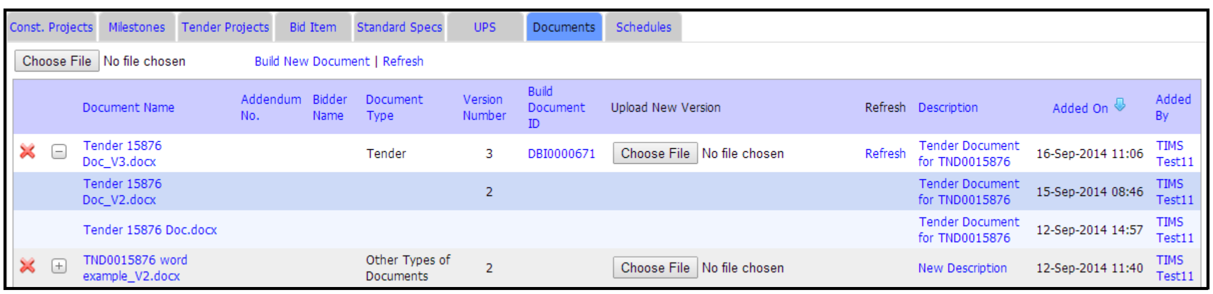
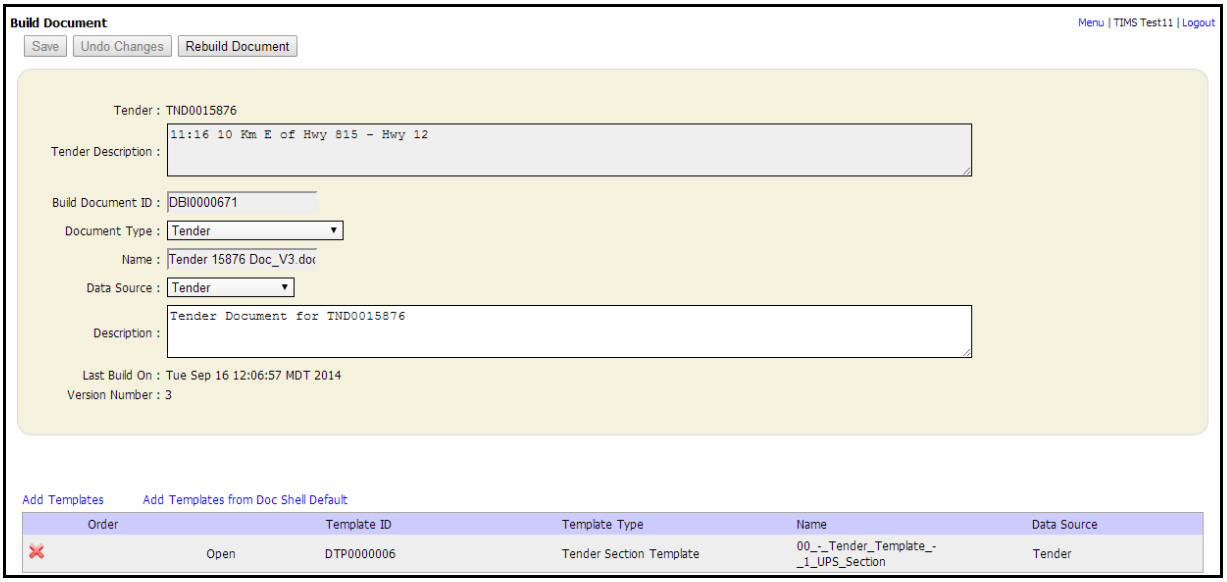
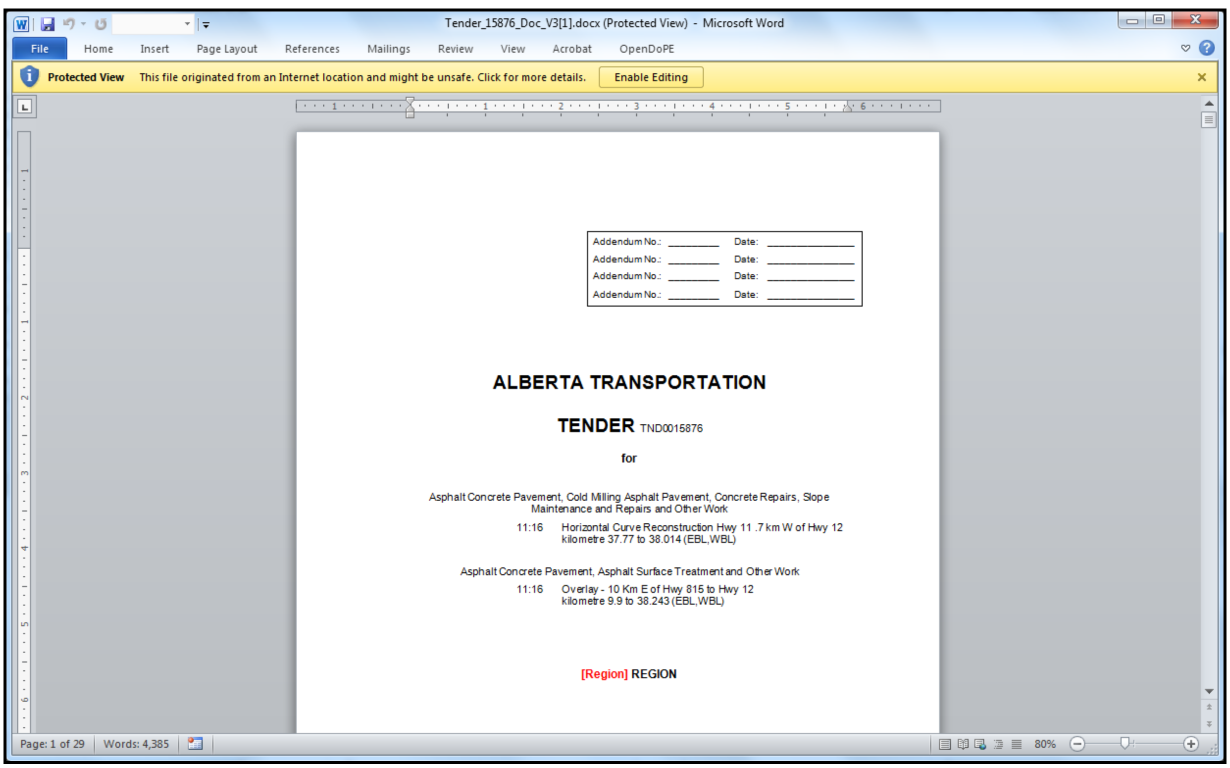


Figure 14.20 Build Document screen - Rebuild Document

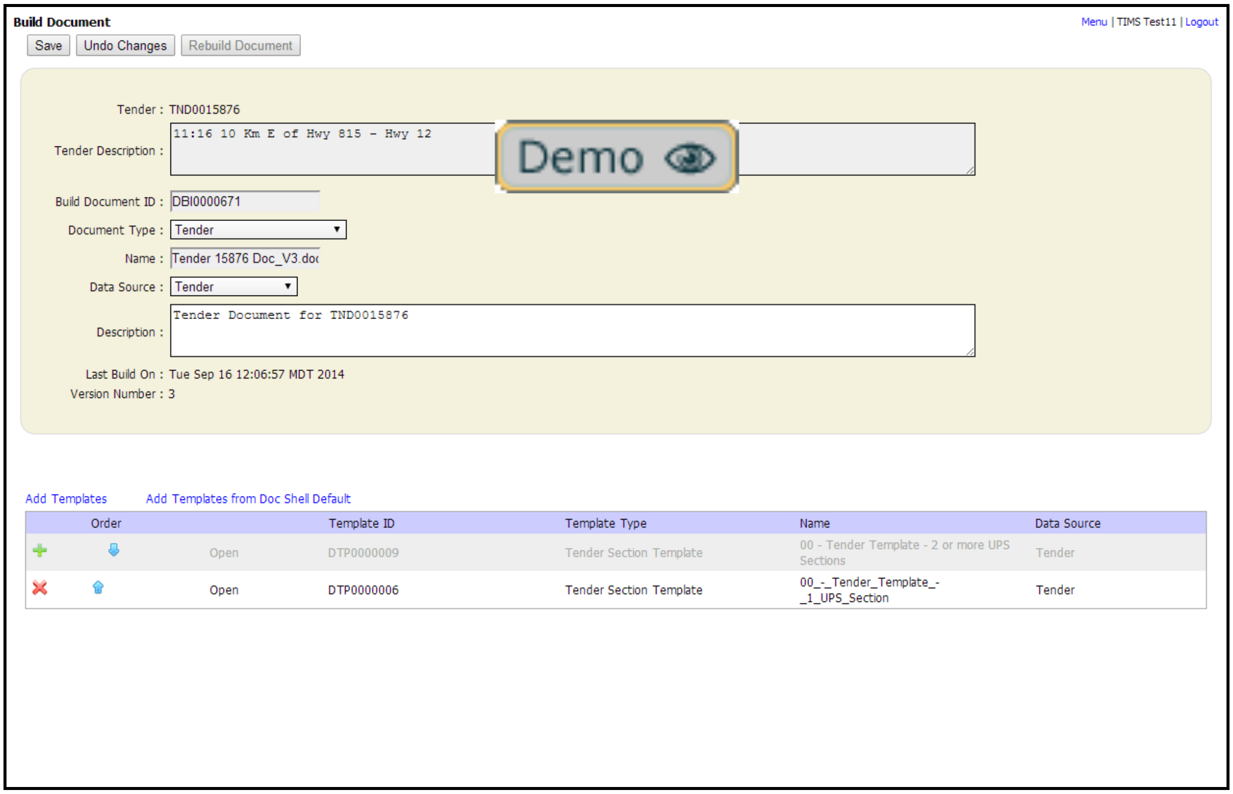


After reviewing the re-built document you can close the Word window and the Build Document screen. In the Documents tab the Added On value will reflect the update.

Figure 14.21 Build Document screen - Re-Built Document



Demo 14.3 Rebuild a Tender Document



How To

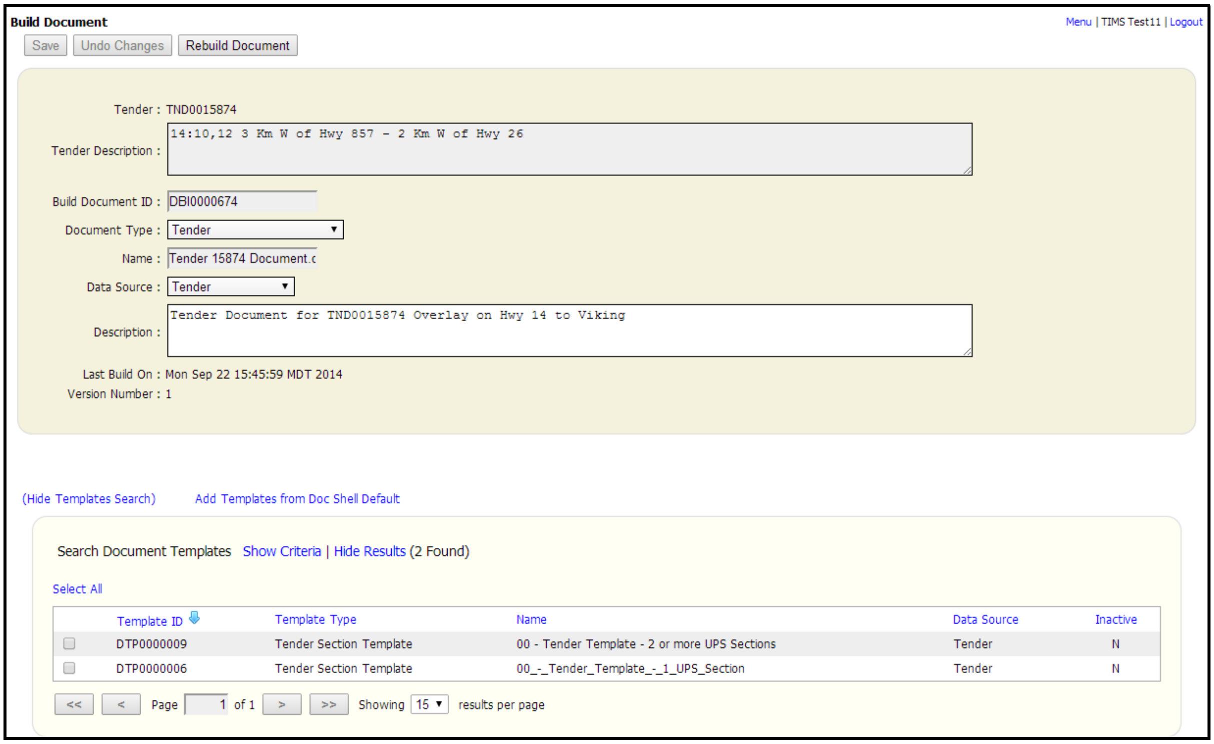
1. From the *Document* tab, select the **Document Build ID** to be rebuilt.
2. From the *Build Document* screen, add or remove templates as necessary.
3. Select the **Save** button.
4. Select the **Rebuild Document** button.
5. From the *File Download* window select the **Open** button.
6. From the *Word* window, view the document as necessary.
7. Select the **Close** button.

Build Tender Document with Multiple UPS Sections

This section of the chapter provides an example of a Tender Document based on the Multiple UPS Sections Template.

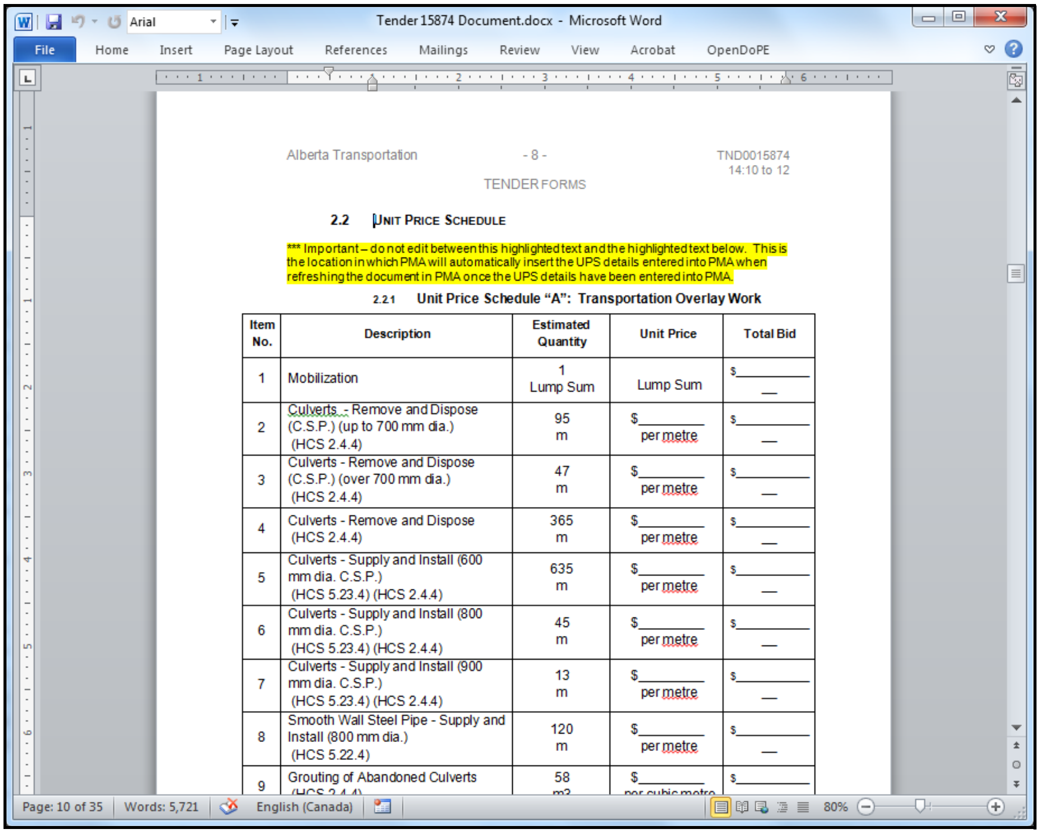
Building a Tender Document with multiple UPS Sections is the same as building a tender document with one UPS Section; the difference is in the template selected. There are two templates available for building tender documents: one for a tender with one Unit Price Schedule Section and the other for a tender with two or more UPS Sections.

Figure 14.22 Build Document screen - Template choices



As long as the Maintain Tender, UPS tab has two or more UPS Sections and the template allowing two or more UPS sections is selected, the resulting document should display a corresponding number of UPS Sections. The following three examples show where Section A begins and ends and how the summary displays all applicable totals.

Figure 14.23 Tender Document screen - Multi UPS Start



Alberta Transportation - 8 - TND0015874
14:10 to 12

TENDER FORMS

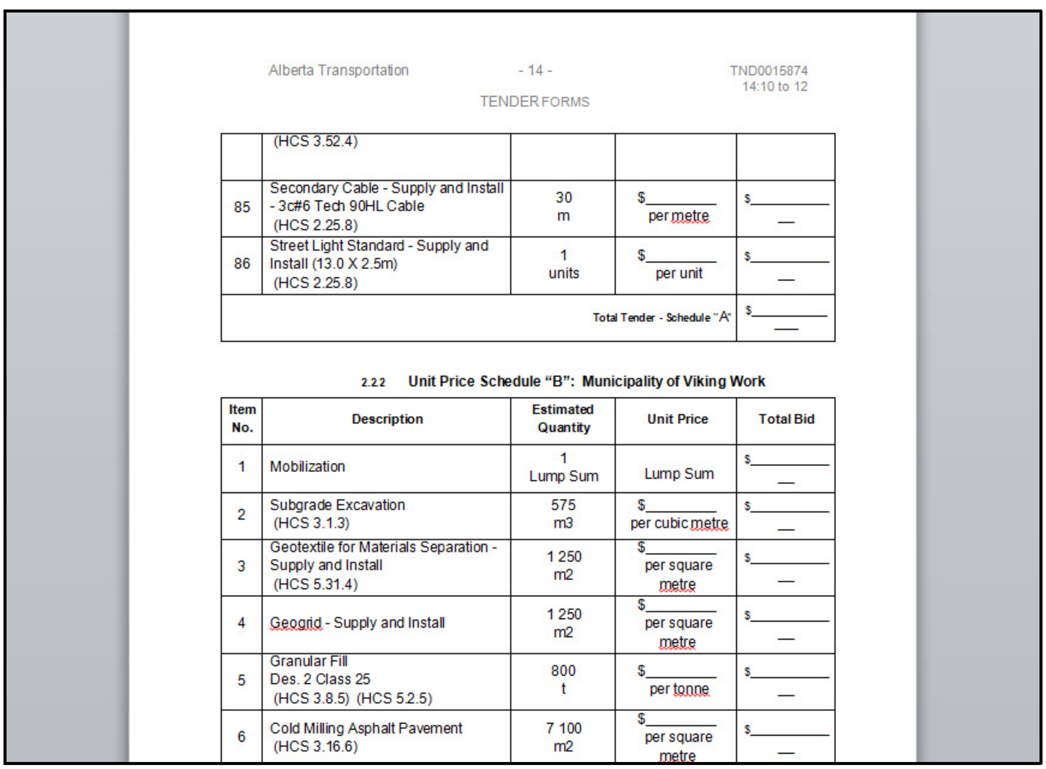
2.2 UNIT PRICE SCHEDULE

*** Important – do not edit between this highlighted text and the highlighted text below. This is the location in which PMA will automatically insert the UPS details entered into PMA when refreshing the document in PMA once the UPS details have been entered into PMA.

2.2.1 Unit Price Schedule "A": Transportation Overlay Work

Item No.	Description	Estimated Quantity	Unit Price	Total Bid
1	Mobilization	1 Lump Sum	Lump Sum	$______
2	Culverts - Remove and Dispose (C.S.P.) (up to 700 mm dia.) (HCS 2.4.4)	95 m	$______ per metre	$______
3	Culverts - Remove and Dispose (C.S.P.) (over 700 mm dia.) (HCS 2.4.4)	47 m	$______ per metre	$______
4	Culverts - Remove and Dispose (HCS 2.4.4)	365 m	$______ per metre	$______
5	Culverts - Supply and Install (600 mm dia. C.S.P.) (HCS 5.23.4) (HCS 2.4.4)	635 m	$______ per metre	$______
6	Culverts - Supply and Install (800 mm dia. C.S.P.) (HCS 5.23.4) (HCS 2.4.4)	45 m	$______ per metre	$______
7	Culverts - Supply and Install (900 mm dia. C.S.P.) (HCS 5.23.4) (HCS 2.4.4)	13 m	$______ per metre	$______
8	Smooth Wall Steel Pipe - Supply and Install (800 mm dia.) (HCS 5.22.4)	120 m	$______ per metre	$______
9	Grouting of Abandoned Culverts (HCS 2.4.4)	58 m3	$______ per cubic metre	$______

Figure 14.24 Tender Document screen - Multi UPS Section change



Alberta Transportation - 14 - TND0015874
14:10 to 12

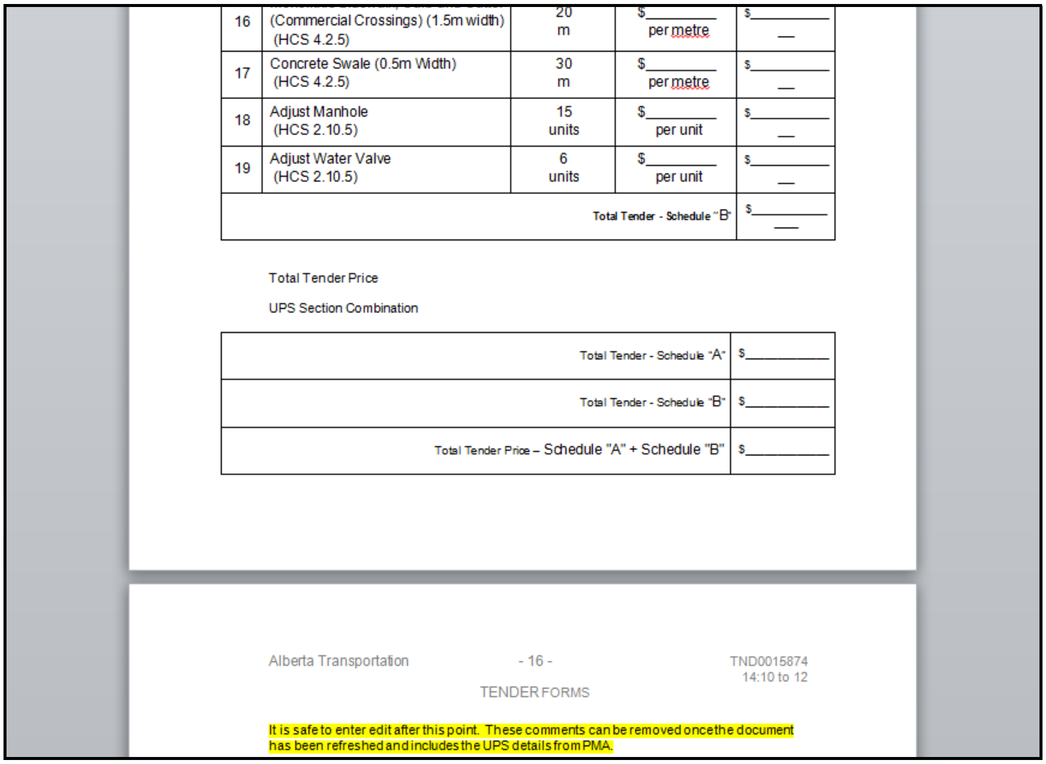
TENDER FORMS

Item No.	Description	Estimated Quantity	Unit Price	Total Bid
	(HCS 3.52.4)			
85	Secondary Cable - Supply and Install - 3c#6 Tech 90HL Cable (HCS 2.25.8)	30 m	$______ per metre	$______
86	Street Light Standard - Supply and Install (13.0 X 2.5m) (HCS 2.25.8)	1 units	$______ per unit	$______
	Total Tender - Schedule "A"			$______

2.2.2 Unit Price Schedule "B": Municipality of Viking Work

Item No.	Description	Estimated Quantity	Unit Price	Total Bid
1	Mobilization	1 Lump Sum	Lump Sum	$______
2	Subgrade Excavation (HCS 3.1.3)	575 m3	$______ per cubic metre	$______
3	Geotextile for Materials Separation - Supply and Install (HCS 5.31.4)	1 250 m2	$______ per square metre	$______
4	Geogrid - Supply and Install	1 250 m2	$______ per square metre	$______
5	Granular Fill Des. 2 Class 25 (HCS 3.8.5) (HCS 5.2.5)	800 t	$______ per tonne	$______
6	Cold Milling Asphalt Pavement (HCS 3.16.6)	7 100 m2	$______ per square metre	$______

Figure 14.25 Tender Document screen - UPS Summary



16	(Commercial Crossings) (1.5m width) (HCS 4.2.5)	20 m	$________ per metre	$________
17	Concrete Swale (0.5m Width) (HCS 4.2.5)	30 m	$________ per metre	$________
18	Adjust Manhole (HCS 2.10.5)	15 units	$________ per unit	$________
19	Adjust Water Valve (HCS 2.10.5)	6 units	$________ per unit	$________
			Total Tender - Schedule "B"	$________

Total Tender Price

UPS Section Combination

Total Tender - Schedule "A"	$__________
Total Tender - Schedule "B"	$__________
Total Tender Price – Schedule "A" + Schedule "B"	$__________

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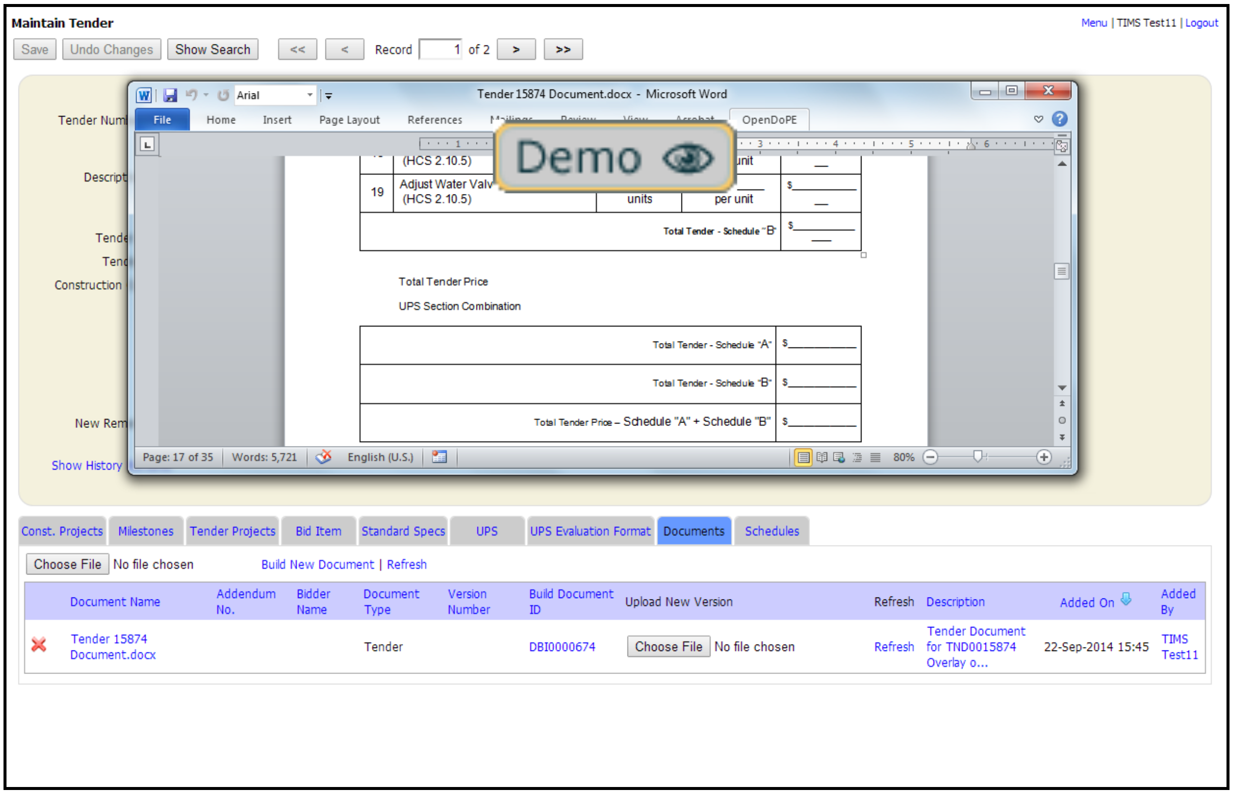
TENDER FORMS

It is safe to enter edit after this point. These comments can be removed once the document has been refreshed and includes the UPS details from PMA.

Demo 14.4 Build Tender Document with Multiple UPS Sections



How To

1. From the *Documents* tab select the **Build New Document** link.
2. From the *Build Document* screen select a **Document Type** from the drop down.
3. Type a **Name** for the output file.
4. Type a **Description** for the file.
5. Select the **Add Templates** link.
6. From the *Search Document Templates* area, enter or select criteria.
7. Select the **Search** button.
8. Check the **2 or more UPS Sections** template.
9. Select the **Add Selected** button.
10. From the *Build Document* screen select the **Save** button.
11. Select the **Build Document** button.
12. From the *File Download* window select the **Open** button.
13. Review the *Document* as necessary and **Close** when complete.

Edit Tender Document

Editing a Tender Document can begin the moment the file is successfully generated or by selecting the Document Name on the Documents tab. Editing the document can mean making changes on the tabs of the Maintain Tender screen or making manual edits to text in the Tender Document.

Editing Guidelines

The editing process requires some co-ordination between groups of users. The following is a suggestion for handing off tenders:

- While the tender is being created, the regional project administrator should not be making changes to the tender.
- When the tender is submitted by the consultant to the regional project administrator, the consultant should not be making further edits to the tender.
- When the tender is accepted by Professional Services, neither the regional project administrator nor the consultant should make further edits to the tender.

As each group completes their work on the tender they will upload the file thus creating a new version, and then email the next group in the process. Therefore, as the tender moves from one group to the next a new version is created to capture the history of the tender documents development.

Alert!	Two different Users must not edit the same file.

The following scenario illustrates the process of editing and hand-offs:

1. The consultant uses the Build New Document button to create the original version of the Tender. A 'working copy' of the tender is saved on the consultants network. The 'original' version is available on the Documents tab but should be considered 'view only'.
2. The consultant completes a significant amount of the Tender Document but wants the regional project administrator to review it before continuing. The consultant uses the Choose File button to upload their 'working' copy of the tender to the Documents tab - thus creating version 2. The consultant sends an email to the regional project administrator advising that the tender is available for comment.
3. The regional project administrator clicks the version 2 document name and reviews the tender document.
    a) If the regional project administrator makes no changes to the file, they close the tender document without saving (no new version is created). The regional project administrator sends an email to the consultant with recommendations.

   b) If the regional project administrator makes changes to the file, they save the file as a working copy and when completed, upload it to the Documents tab - thus creating version 3. The regional project administrator sends an email to the consultant advising them of the edits.

4. Having received the email, the consultant clicks the current version (V2 or V3) of the document name to create a new working copy. The consultant continues making edits to the working copy of the tender document.
5. When the tender document is completed the consultant uploads the working copy into the Documents tab - thus creating a new version (V3 or V4).
6. The consultant with the submit security role; clicks the current version document name and reviews the tender document, verifies that the tender is complete and selects the Submit to Transportation button on the Maintain Tender screen.
7. The regional project administrator clicks the current version document name and reviews the tender document.
   a) If the regional project administrator is satisfied with the Tender Document, they close the tender document without saving (no new version is created). The regional project administrator sends an email to Professional Services - Tender Services.
   b) If the regional project administrator returns the Tender Document to the consultant, they close the file without saving (no new version created). The regional project administrator sends an email to the consultant advising them of the edits to be made.
8. If the consultant:
   a) receives an email advising of edits to be made, they click the current version of the document name to create a new working copy > edit the working copy > upload the working copy (creating a new version) and re-submit the tender.
   b) does not receive an email (the tender has moved on to Professional Services) they do nothing with the tender (tabs or document).

Edit Tender Document Workflow

This section of the guide covers editing the Tender Document using Microsoft Word. Editing a tender document can involve several steps and various types of edits. These are listed below and covered in subsequent sections of this chapter.

1. Open the Tender Document in Word
    a) Generate New Tender Document (Build Document)
    b) Select the current Document Name link (Documents tab)
2. Edit New Tender Document
    a) Verify pre-populated entries
    b) Recognize areas of the tender document to leave alone (yellow highlighting)
    c) Enter manual edits (red text)
    d) Enter tender text
    e) Update the Table of Contents
3. Upload Edited Tender Document
4. Edit existing/returned Tender Document
5. Re-Upload updated Tender Document

See: For additional help on editing the Tender Document's UPS Schedule *See* Demo 14.8 Refresh a Build Document on page 14-47.

Saving Documents

PMA Delivery is a web-based application. When it generates files it replaces spaces between words with underscores. The user can name the file anything appropriate. The user can save the file to their network while development of the tender document is on-going. Once editing the document has been completed, the user will need to upload the file back into PMA Delivery. To have a successful upload the file name must match the file name being replaced. Therefore, the file may need to be renamed prior to the upload.

The following examples show the actual Document Name on the Documents tab and the file name that is created by PMA Delivery during the download. The second and third examples show how to change the name to the correct file name.

Figure 14.26 Edit Tender Document - Document Name link

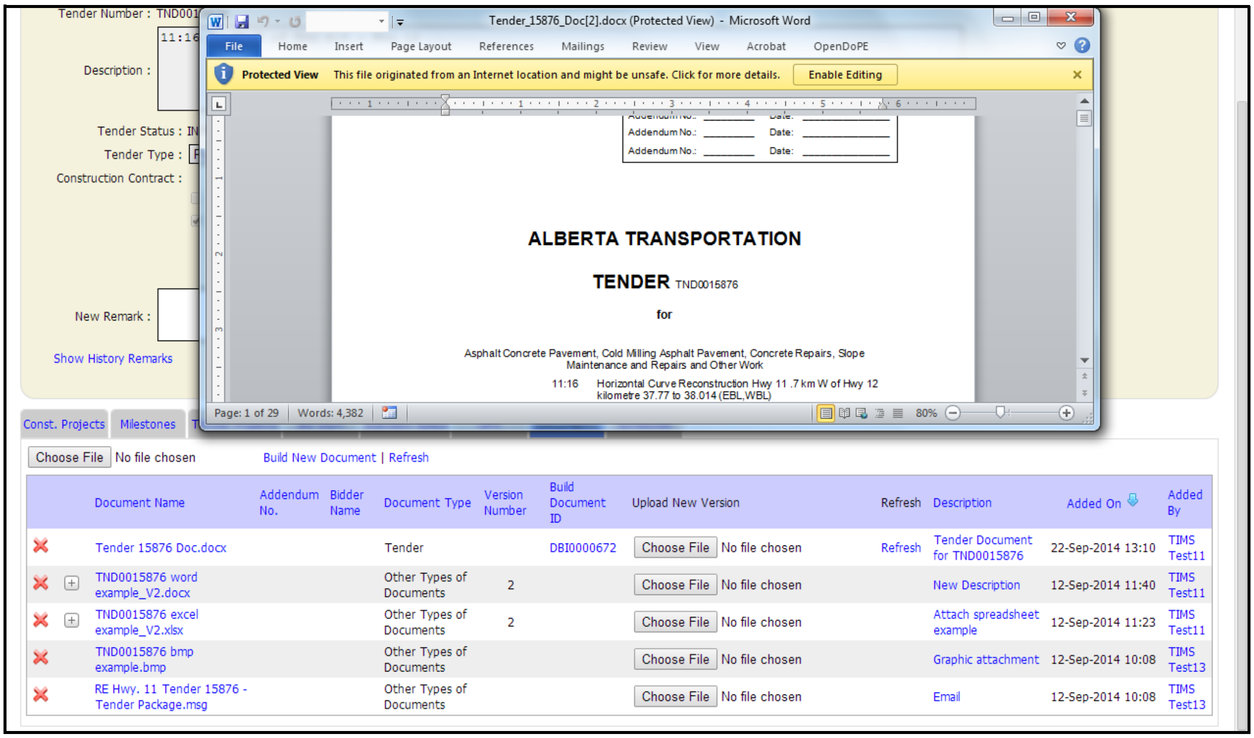
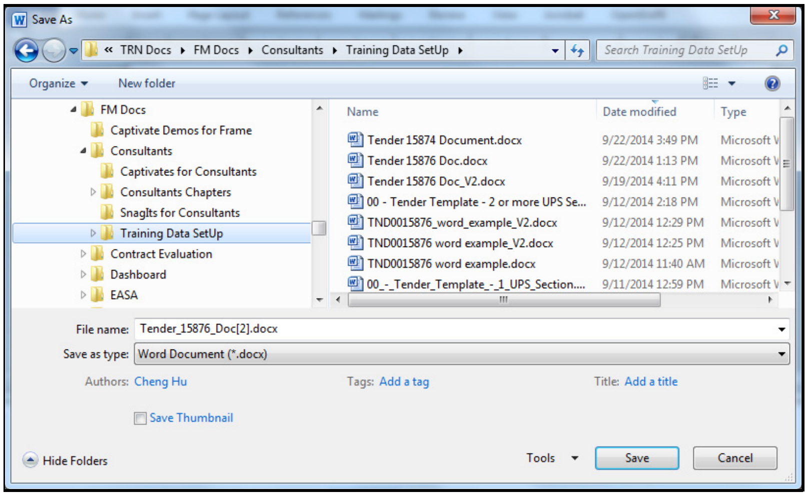
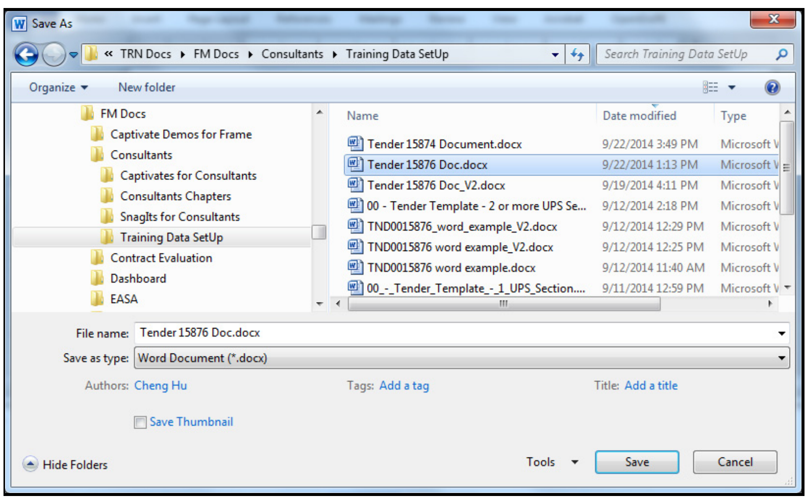


Figure 14.27 Tender Document- Original File Name



Alert! The name of the file to be uploaded MUST match the current Document Name shown on the Documents tab.

Figure 14.28 Tender Document - Corrected File Name

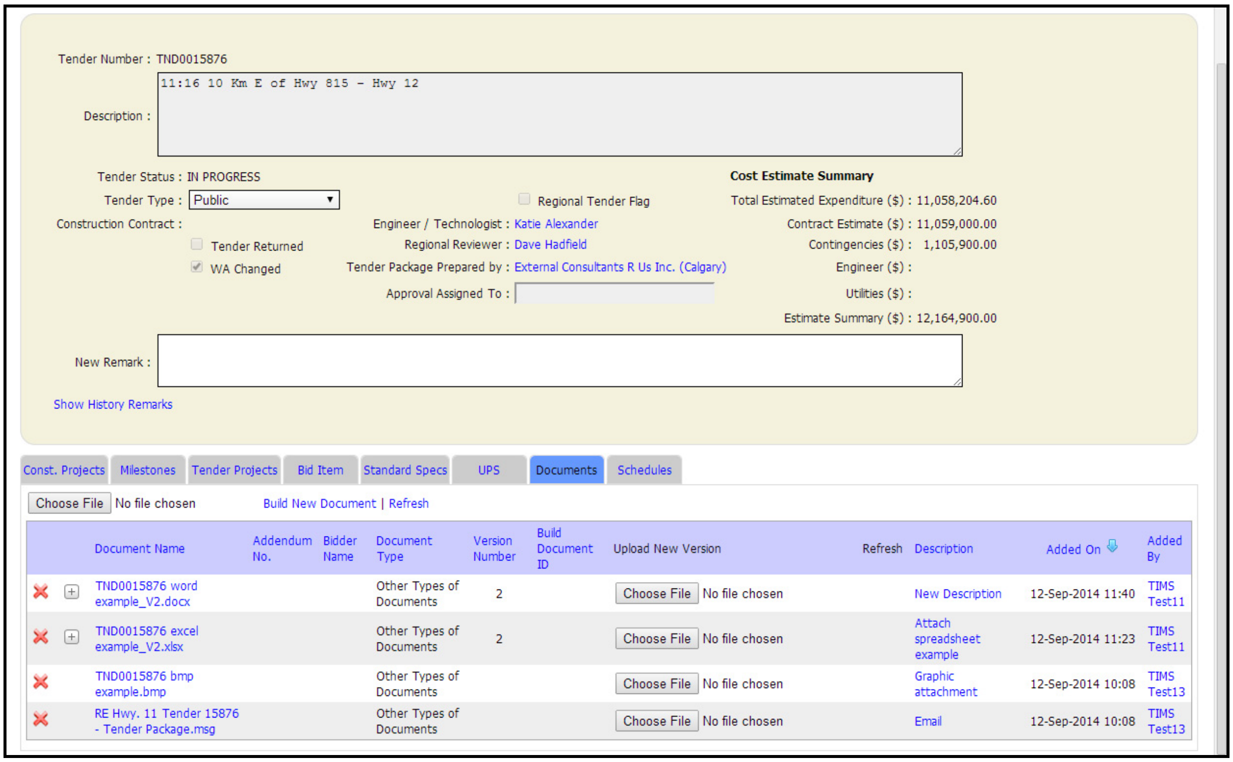


Generate New Tender Document

The Build New Document link not only creates the Tender Document, it also opens the newly created document in Microsoft Word® - ready for editing.

See: *See* ***"Build New Tender Document" on page 14-12 for additional information..***

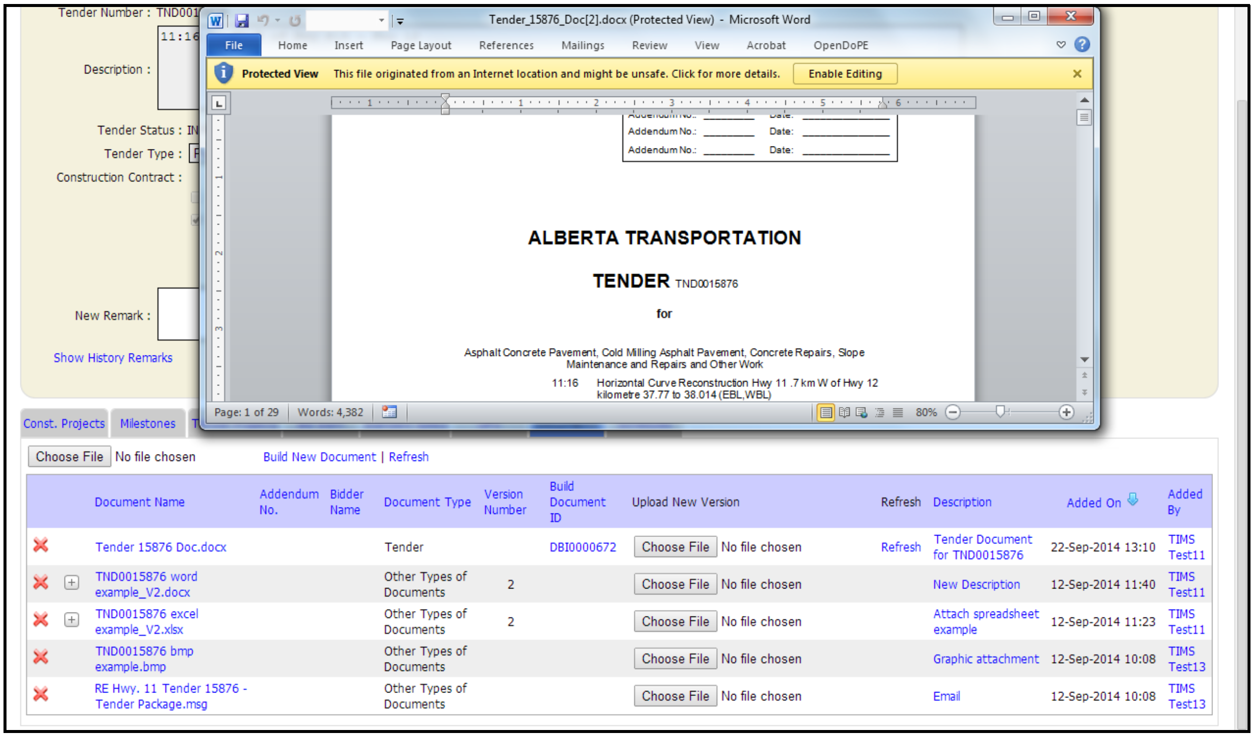
Figure 14.29 Documents tab - Build New Document link



Select Current Document Name

Selecting the current Document Name link on the Documents tab will open Microsoft Word® with the file ready for immediate editing.

Figure 14.30 Documents tab - Current Document Name link

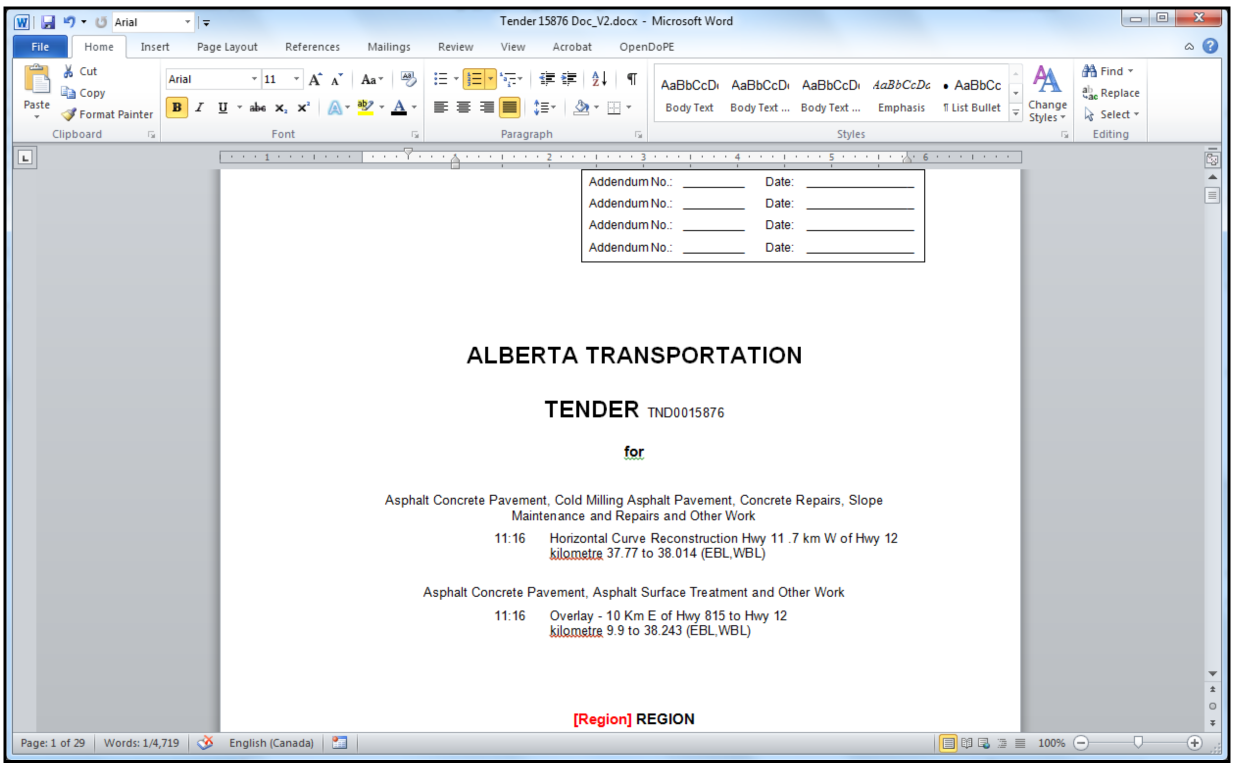


Edit New Tender Document

Microsoft Word® is used to edit the Tender Document. The document contains text, and pre-populated fields. In order to successfully edit the Tender Document the following is a list of elements in the document to be aware of:

1. Verify pre-populated fields
2. Recognize areas of the tender document to leave alone (yellow highlighting)
3. Enter mandatory text (red)
4. Enter tender text
5. Use template styles for headings
6. Update the Table of Contents

Figure 14.31 Edit Tender Document - Word screen

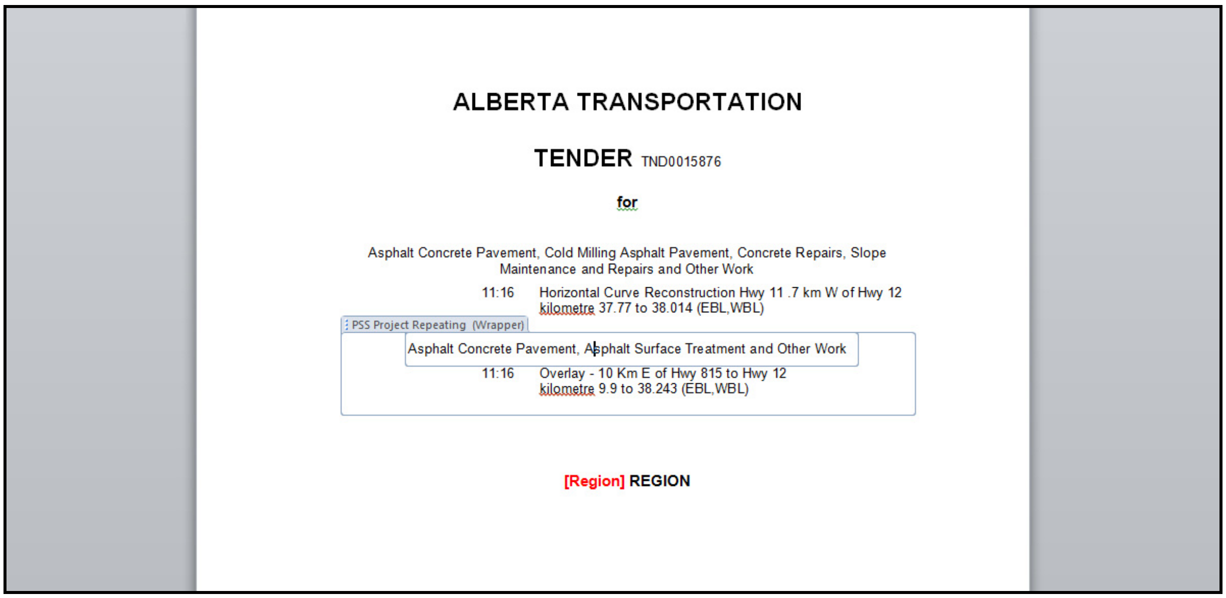


Pre-Populated Fields

The pre-populated fields (automated entries) use data from the Maintain Tender screens and tabs. These fields are to be left alone in the document. Identifying a pre-populated field can be done by mousing over the area. The field will become shaded. Clicking on a field will display borders and additional information (Figure 14.32 below). The cover page is a good example of pre-populated fields; the tender number is generated in PMA Delivery and displayed in a field on the cover page, the tender project information is a field on the cover page populated with data from the Tender Projects tab in PMA.

Alert! Do Not edit fields in the Tender Document. Any field, with or without data, MUST not be edited.

Figure 14.32 Edit Tender Document - Automated fields



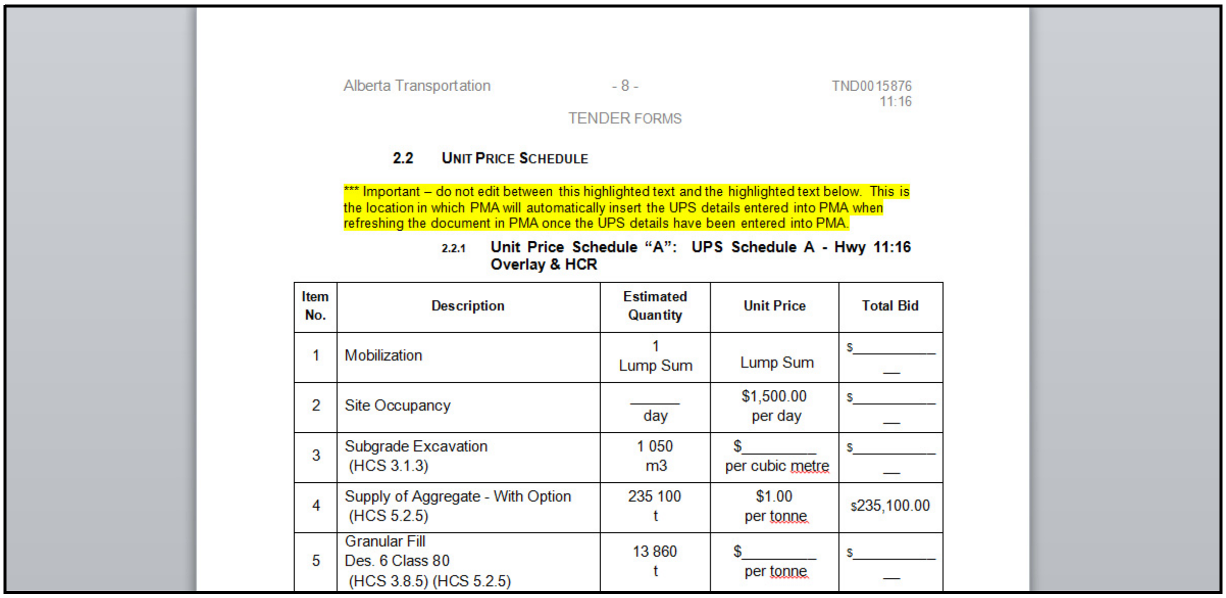
Hint: Mousing over a field will cause the field to become shaded.

Highlighted Fields

The Unit Price Schedule is a field. Highlighting (yellow) appears before the field begins and after it ends. If the UPS has been created in PMA Delivery, the Bid Items will be automatically listed in the Tender Document. The UPS is another example of a pre-populated field and is not to be edited within the tender document. Any changes to bid items or the numerical order, is done in PMA Delivery on the Maintain Tender screen.

Alert! Do Not edit highlighted areas in the Tender Document. Any area between highlighted text, with or without data, MUST not be edited.

Figure 14.33 Edit Tender Document - UPS Section



Alberta Transportation - 8 - TND0015876 11:16

TENDER FORMS

2.2 UNIT PRICE SCHEDULE

*** Important – do not edit between this highlighted text and the highlighted text below. This is the location in which PMA will automatically insert the UPS details entered into PMA when refreshing the document in PMA once the UPS details have been entered into PMA.

2.2.1 **Unit Price Schedule "A": UPS Schedule A - Hwy 11:16 Overlay & HCR**

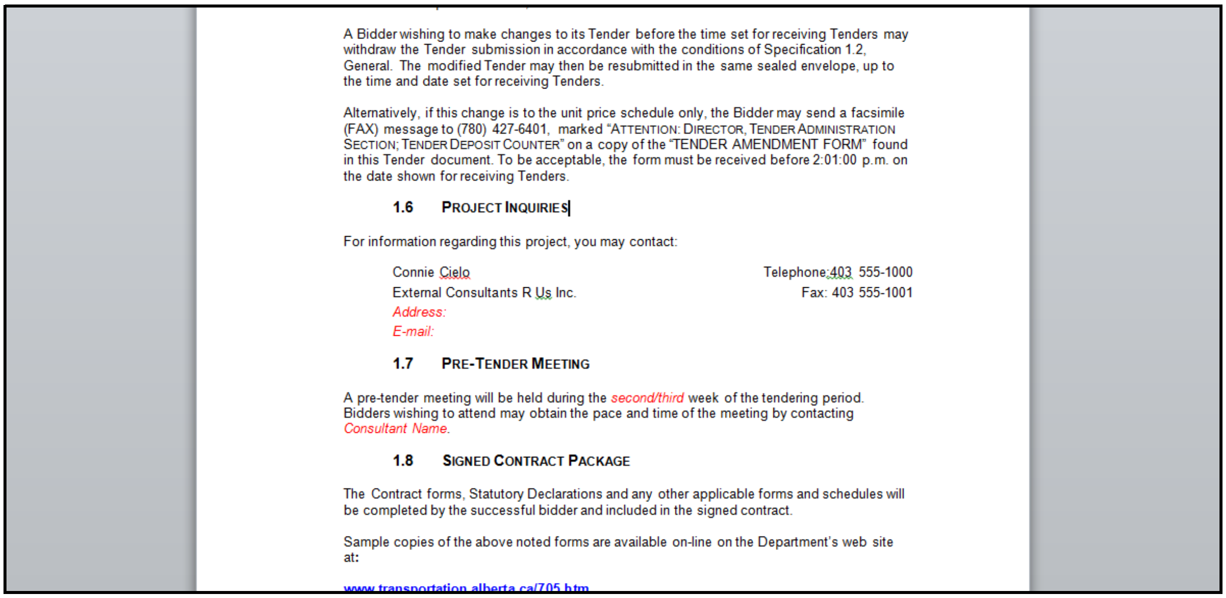
Item No.	Description	Estimated Quantity	Unit Price	Total Bid
1	Mobilization	1 Lump Sum	Lump Sum	$_________
2	Site Occupancy	_____ day	$1,500.00 per day	$_________
3	Subgrade Excavation (HCS 3.1.3)	1 050 m3	$_________ per cubic metre	$_________
4	Supply of Aggregate - With Option (HCS 5.2.5)	235 100 t	$1.00 per tonne	$235,100.00
5	Granular Fill Des. 6 Class 80 (HCS 3.8.5) (HCS 5.2.5)	13 860 t	$_________ per tonne	$_________

Hint: If there is no UPS Section between the highlighted areas, it's because no one has created the UPS for the tender in PMA Delivery.

Mandatory (red) Text

Throughout the tender document are examples of red text. Any red text requires some amount of editing. Whether the text is not required or needs to be replaced, is open for interpretation but it must be dealt with. The [Region] text on the cover page is one example where the red text must be replaced with the actual Alberta Transportation region (Central, Fort McMurray, North Central, Peace, Southern). However, the number of environmental and geotechnical reports, depends on the tender.

Figure 14.34 Edit Tender Document - Mandatory Red Text



A Bidder wishing to make changes to its Tender before the time set for receiving Tenders may withdraw the Tender submission in accordance with the conditions of Specification 1.2, General. The modified Tender may then be resubmitted in the same sealed envelope, up to the time and date set for receiving Tenders.

Alternatively, if this change is to the unit price schedule only, the Bidder may send a facsimile (FAX) message to (780) 427-6401, marked "ATTENTION: DIRECTOR, TENDER ADMINISTRATION SECTION; TENDER DEPOSIT COUNTER" on a copy of the "TENDER AMENDMENT FORM" found in this Tender document. To be acceptable, the form must be received before 2:01:00 p.m. on the date shown for receiving Tenders.

1.6 PROJECT INQUIRIES

For information regarding this project, you may contact:

Connie Cielo — Telephone: 403 555-1000
External Consultants R Us Inc. — Fax: 403 555-1001
Address:
E-mail:

1.7 PRE-TENDER MEETING

A pre-tender meeting will be held during the *second/third* week of the tendering period. Bidders wishing to attend may obtain the pace and time of the meeting by contacting *Consultant Name*.

1.8 SIGNED CONTRACT PACKAGE

The Contract forms, Statutory Declarations and any other applicable forms and schedules will be completed by the successful bidder and included in the signed contract.

Sample copies of the above noted forms are available on-line on the Department's web site at:

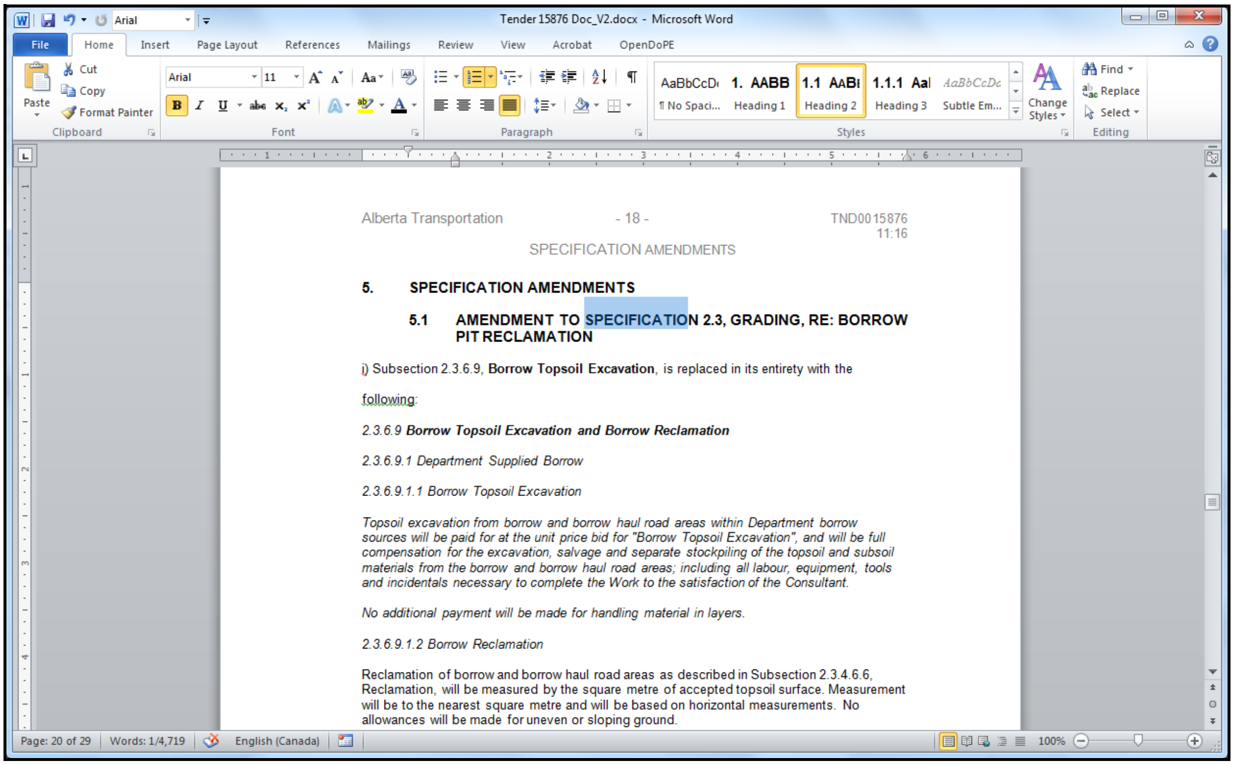
www.transportation.alberta.ca/705.htm

Alert! Reformat the red text to black and turn off the italics if applicable.

Enter Tender Text

Text can be added to the Tender Document by manually typing the text or by copying and pasting the text from another source. Formatting the text can be done once the text has been added. The use of styles must be used when entering headings and should be considered when adding any text. Figure 14.35 below shows a Heading 2 style applied to the '5.1 Amendment to...' heading. All of the text in section 5 of the example has been copied and pasted.

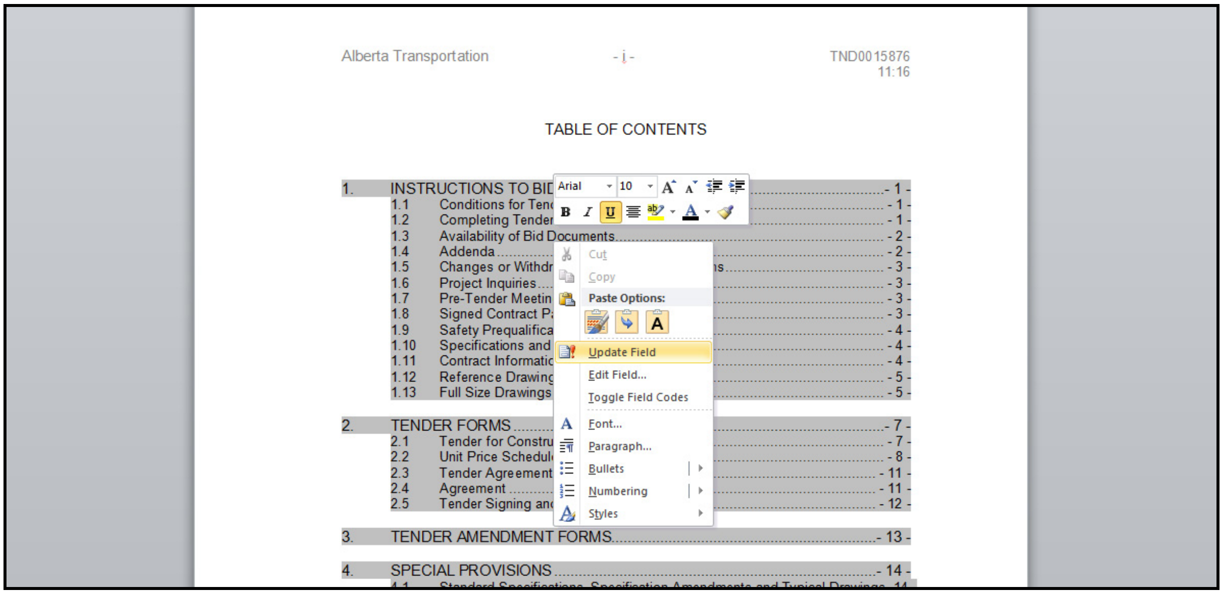
Figure 14.35 Edit Tender Document - Heading Styles



Update the TOC

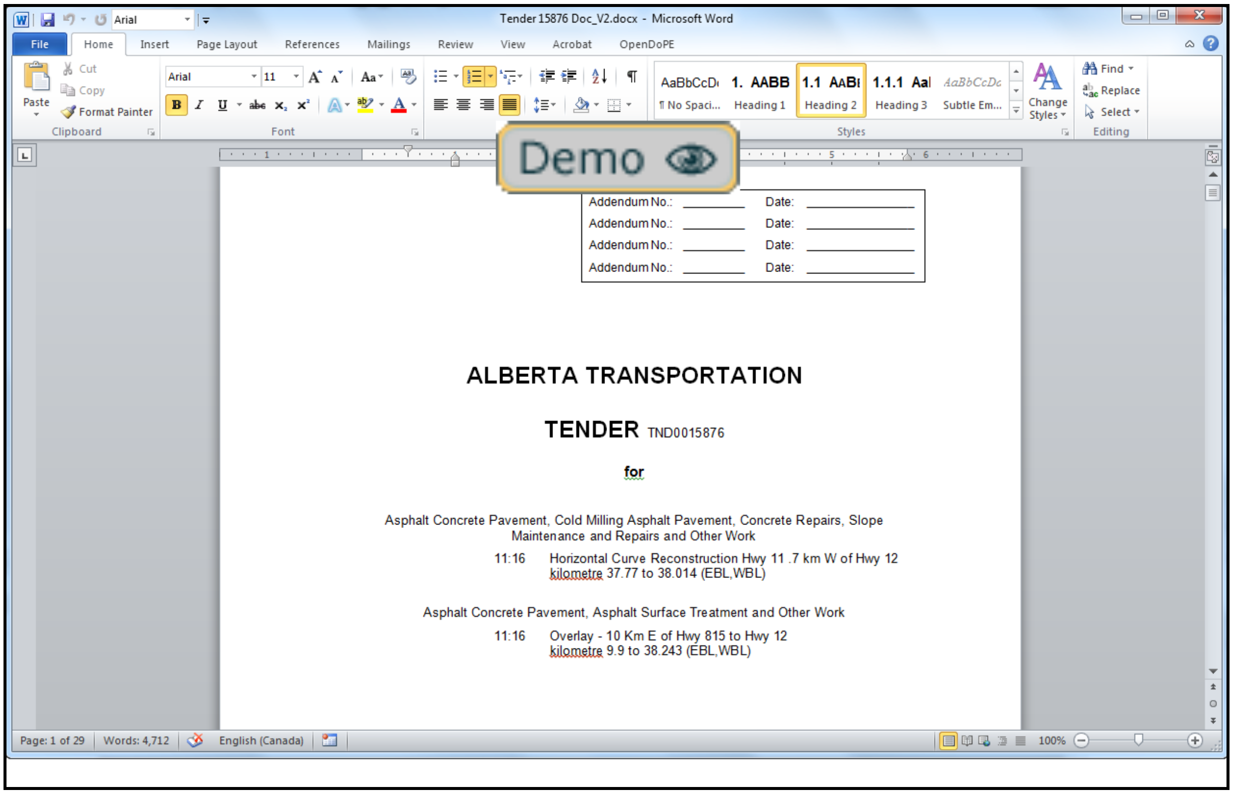
The Table of Contents (TOC) will need to be updated in order to display the proper page numbers for the headings in the document. When the Tender Document is generated, it includes a Table of Contents. The initial table of contents is based on the tender document having no additional text or data. When the UPS is created in PMA Delivery and the Tender Document is refreshed (*See **"Refresh (Build Document)" on page 14-46 for additional information.***) the UPS can take up one or more pages. This has an impact on the TOC. When additional text is added in the form of list items or paragraphs, the TOC may be impacted. When text is added to sections of the tender document (i.e. Sections 5, 6, 7, etc.) and the additional text contains headings, the TOC will be impacted. Before the edited Tender Document is uploaded to PMA Delivery, the TOC must be updated. A right-click anywhere in the TOC will open a menu including the Update Field option.

Figure 14.36 Edit Tender Document - TOC Right click



Hint: Update the TOC prior to uploading the file to PMA.

Demo 14.5 Edit a Tender Document



How To

1. Navigate the network to the location of the tender document file.
2. Open the tender document using Microsoft Word®.
3. Do Not edit pre-populated fields.
4. Edit all Red text.
5. Add text as required.
6. From the *Table of Contents* area, right-click.
7. Select the **Update Field** option.
8. Select the **Save** button.

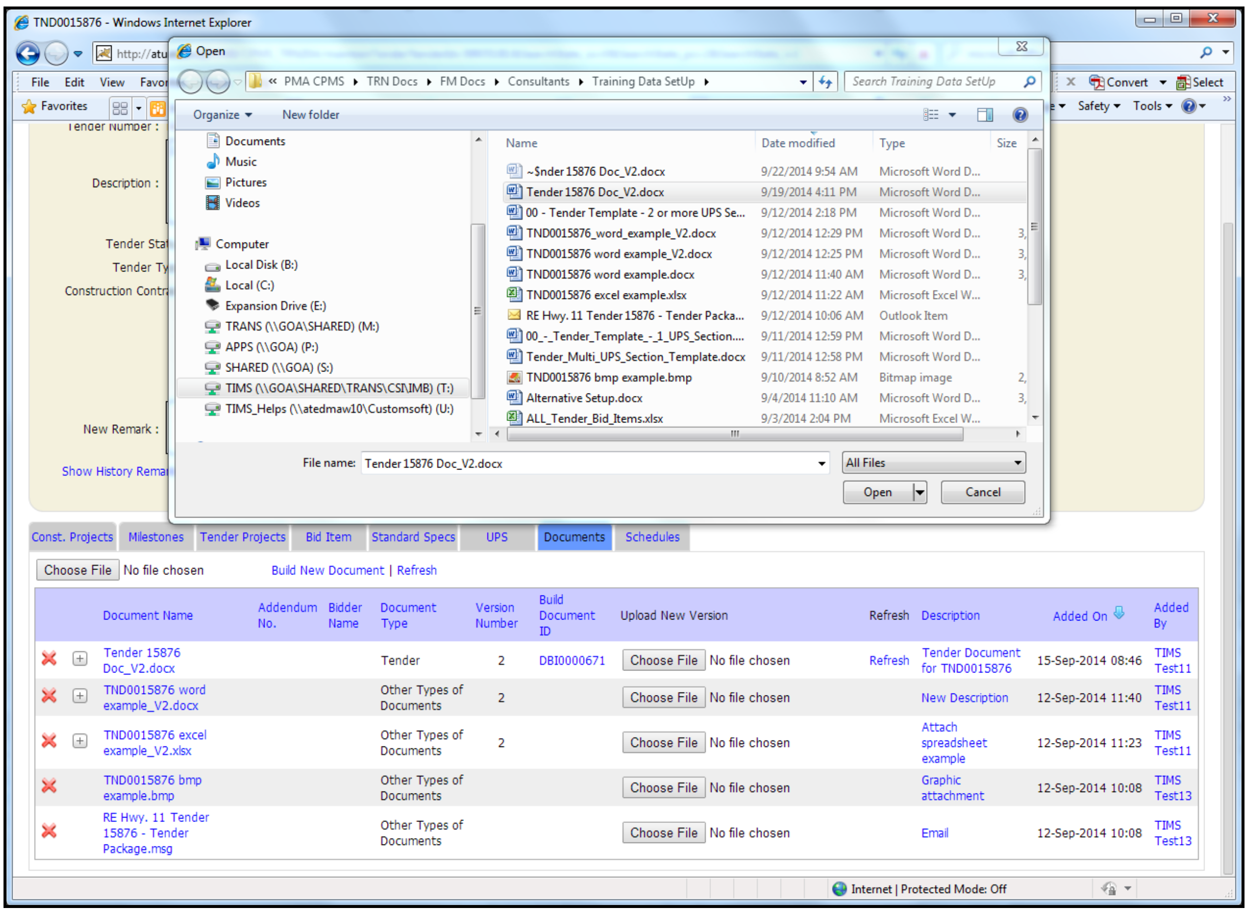
Upload Edited Tender Document

Whenever the Tender Document has been edited in Word and needs to be reviewed by another user group, it must be uploaded into PMA Delivery. The Documents tab on the Maintain Tender screen provides the functionality to upload a revised file. The Choose File button of the Tender Document (Build Document) is used to select the file and perform the upload. PMA Delivery will take care of the naming and versioning.

Alert! The name of the file being uploaded must match the *Document Name* it is replacing.

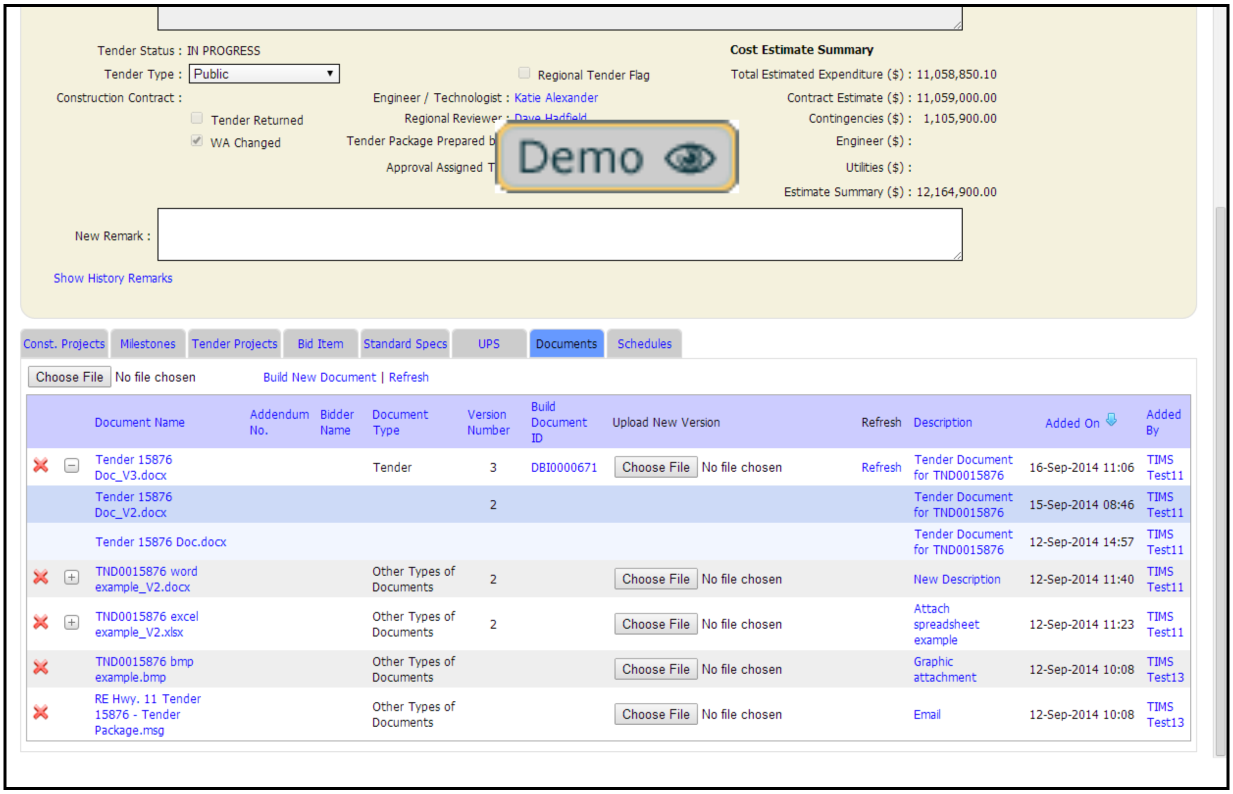
Hint: Select the Choose File button for the Tender Document.

Figure 14.37 Edit Tender Document - Upload Tender file



See: *See* ***"Choose File (Versions)" on page 14-43 for additional information.***

Demo 14.6 Upload Edited Tender Document



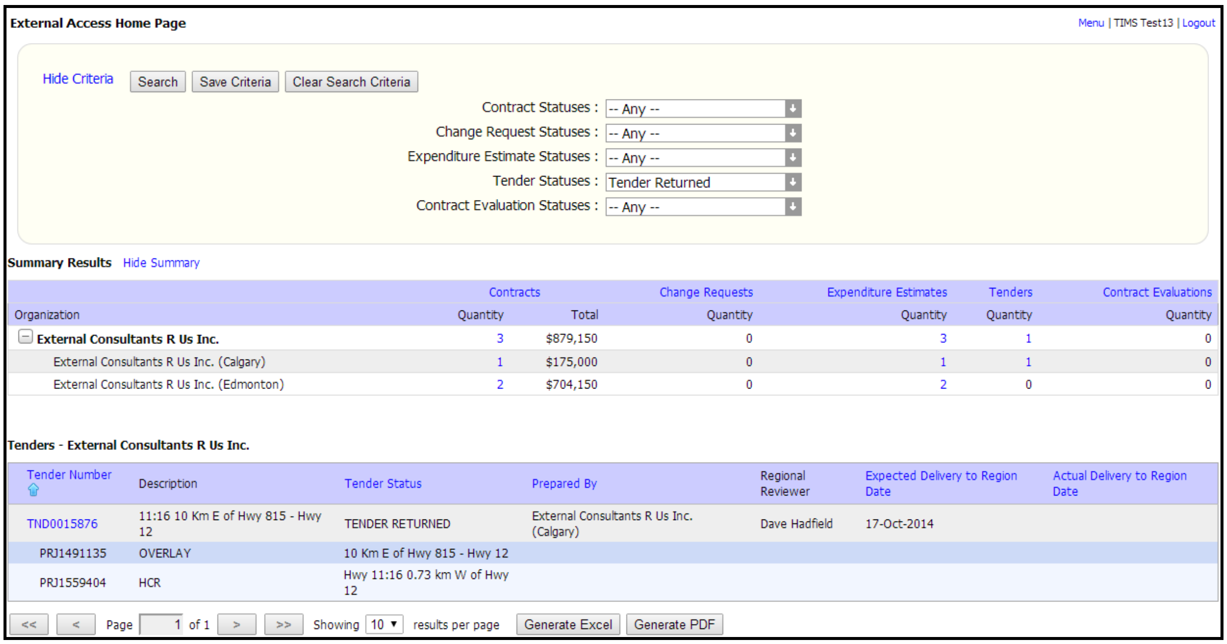
How To

1. From the *Documents* tab select the **Choose File** button for the Document Name being updated.
2. From the *Open* window, navigate to, select and open the updated file.
3. From the *Maintain Tender* screen select the **Save** button.

Edit Returned Tender

When the Regional Project Administrator (Regional Reviewer) has reviewed the Tender Package and requires further edits, they 'Return' the tender to the consultant. Typically an email is sent from the reviewer to the consultant when the tender has been returned. The email contains a link that the consultant can click to access the tender in question. However, the consultant has the ability to be pro-active by searching for Tenders with the status of 'Tender Returned'.

Figure 14.38 External Access Home Page - Search for Returned Tenders results



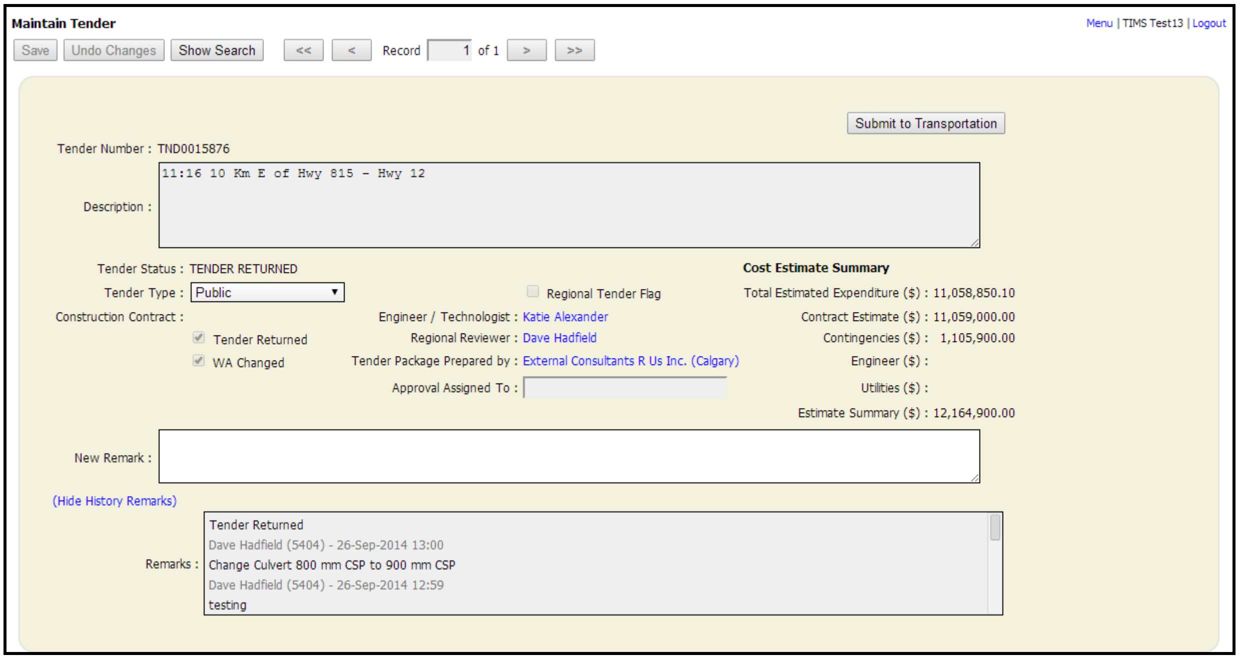
Editing a returned tender is nothing different than has been covered previously in this chapter. When the tender is ready to resubmit, follow the Submit Tender to Transportation steps.

See: *See* ***"Submit Tender Package" on page 17-2 for additional information.***

If a tender is returned, the consultant should check the notification Email and the Remarks History of the Maintain Tender screen for reasons why.

Hint: The Regional Reviewer must supply remarks when they change the Tenders status to 'Tender Returned'.

Figure 14.39 Maintain Tender screen - Show Remarks History

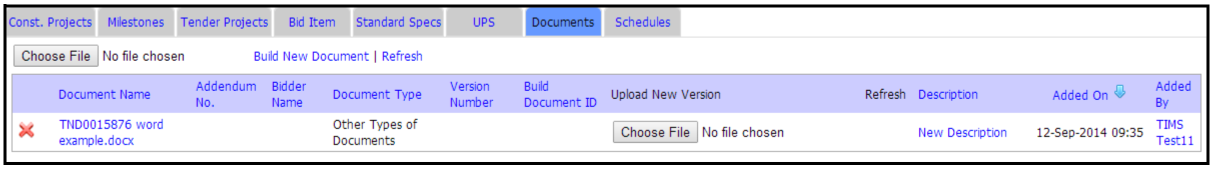


Choose File (Versions)

If a file is attached to the Documents tab and then updated outside of PMA, the new version can be added to the Documents tab using one of two methods:

1. Using the Choose File button above the list
2. Using the Choose File button in the row of the original file (recommended)

Figure 14.40 Documents tab – Original Version



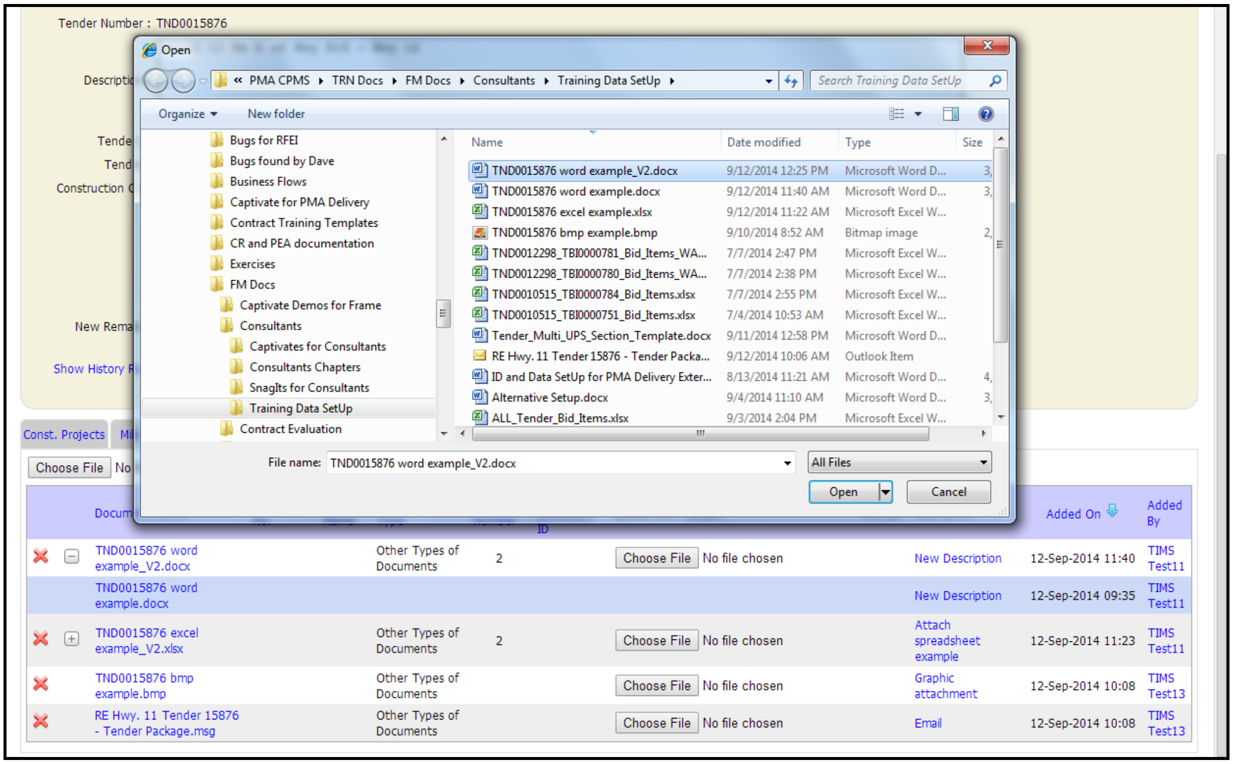
Selecting the Choose File button above the list, allows the user to attach the latest version of the file. The user can then delete the old version. However, this is a manual approach that the user would be responsible for. This method does not maintain a history and does not impose any naming restrictions.

Selecting the Choose File button in the row of the file, allows the user to attach a newer version of the file. PMA Delivery will assign a version number to it and maintain the previous versions in a logical sequence. PMA Delivery will also block any attempts at removing previous versions thus maintaining the history of the file.

Alert!	Using the Choose File button in the row of the file creates a new version of the file.

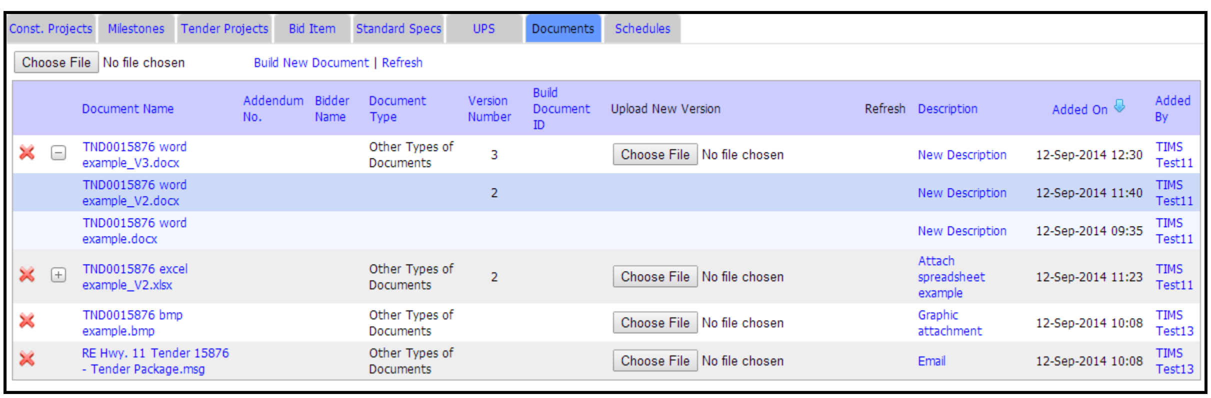
In Figure 14.41 below you can see the name of the file in the Document tab (TND0015876 word example_V2.docx) is the same as the file selected in the Open window. In Figure 14.42 below that, notice how PMA Delivery has renamed the file to TND0015876 word example_V3.docx.

Figure 14.41 Documents tab – Choose New Version

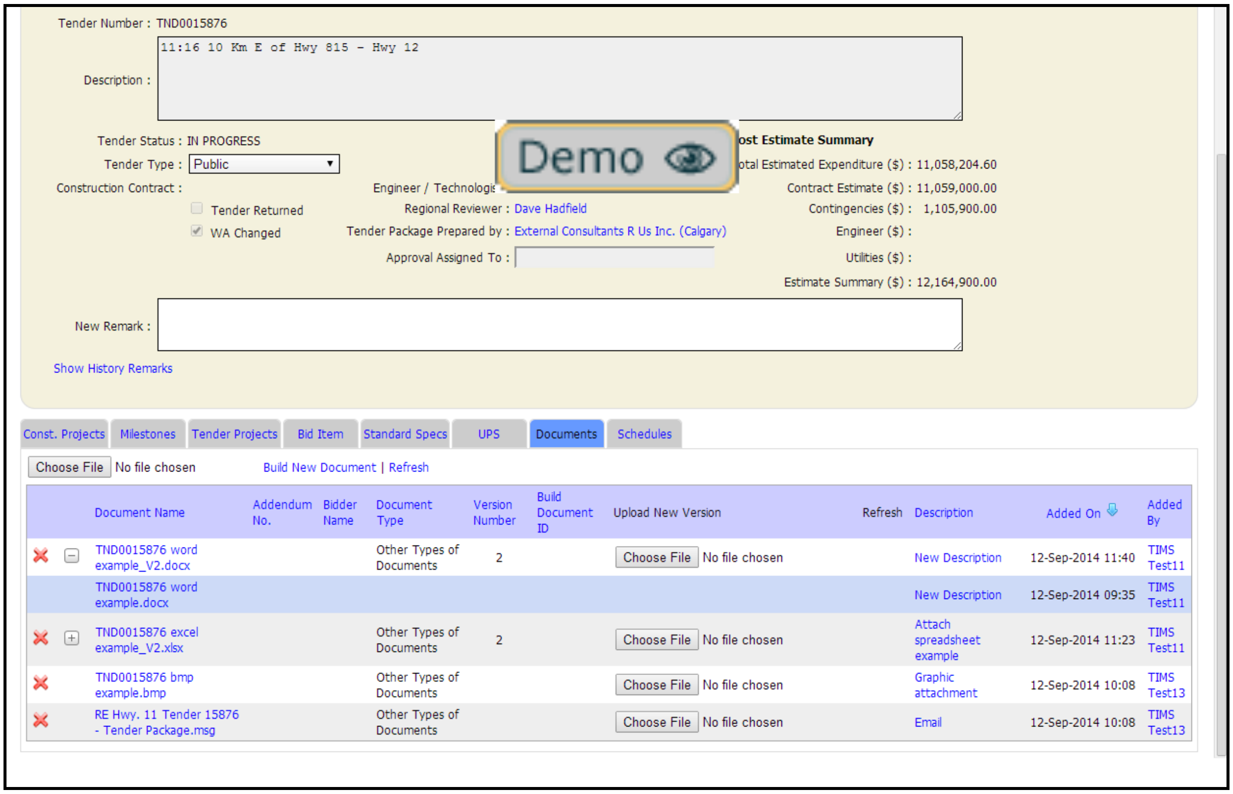


Alert! The new version must have the same file name as the one it is replacing. PMA will automatically change the name by adding a _V1, _V2, _V3 etc. during the upload.

Figure 14.42 Documents tab – New Versions



Demo 14.7 Create a Version



How To

1. From the *Documents* tab select the **Choose File** button for the Document Name being updated.
2. From the *Open* window, navigate to, select and open the updated file.
3. From the *Maintain Tender* screen select the **Save** button.

Refresh (Build Document)

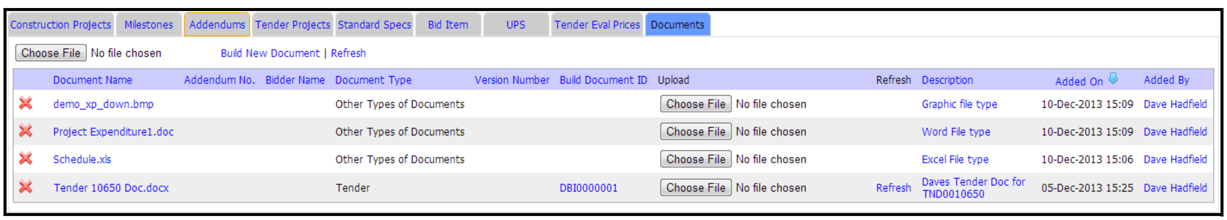
Build Documents (those created by using the Build Document screen and a template) each have a Refresh link. This link will update the selected document with any changes to tender data on other tabs. For example, if the Tender Projects tab is revised, refreshing the Tender Document will display the Tender Project changes on the Cover Page of the Tender Document.

Hint: Only Build Documents display the Refresh link.

Figure 14.43 below shows the Tender Document (Tender 10650 Doc.docx) at the bottom of the list. Clicking the Document Name, will open the Word document. However, clicking the Refresh link will update the word document with any changes made on tender screens and tabs.

Alert! A Refresh of a Build Document will automatically create a new version.

Figure 14.43 Maintain Tender - Documents tab

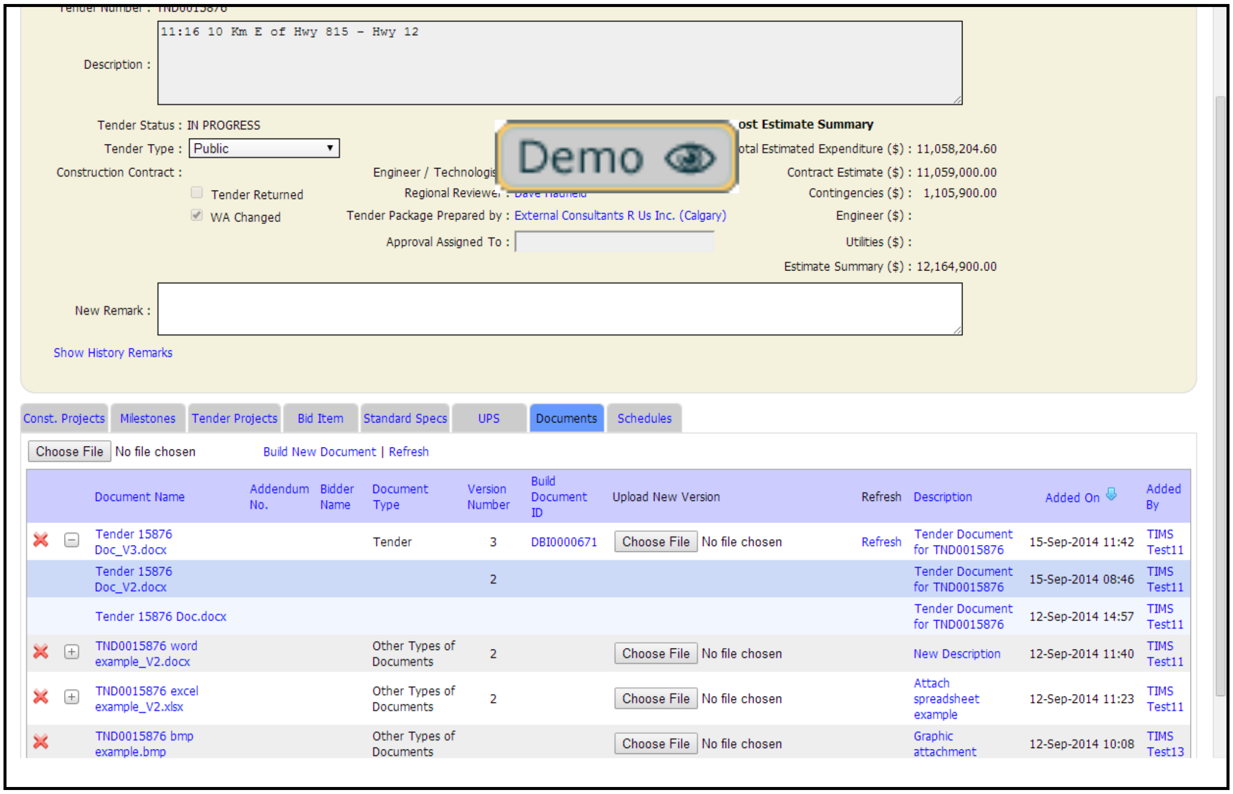


Document Name	Addendum No.	Bidder Name	Document Type	Version Number	Build Document ID	Upload	Refresh	Description	Added On	Added By
demo_xp_down.bmp			Other Types of Documents			Choose File No file chosen		Graphic file type	10-Dec-2013 15:09	Dave Hadfield
Project Expenditure1.doc			Other Types of Documents			Choose File No file chosen		Word File type	10-Dec-2013 15:09	Dave Hadfield
Schedule.xls			Other Types of Documents			Choose File No file chosen		Excel File type	10-Dec-2013 15:06	Dave Hadfield
Tender 10650 Doc.docx			Tender		DBI0000001	Choose File No file chosen	Refresh	Daves Tender Doc for TND0010650	05-Dec-2013 15:25	Dave Hadfield

Maintain Tender tabs that will impact a Tender Document with a refresh are:

- Tender Projects
- Bid Items
- UPS

Demo 14.8 Refresh a Build Document



How To

1. From the *Maintain Tender* screen select and edit the necessary tabs.
2. Save any updates as necessary.
3. From the *Documents* tab select the **Refresh** link (beside Build Document in the list).
4. From the *File Download* window select the **Open** button.
5. View the word document.

Alert! Once the Tender Status is no longer 'In Progress' all Tender Bid Items and UPS' MUST have a status of Completed for the Refresh function to work.

Refresh Tender Document example

The following screens show an example beginning with the original Tender Document, making changes on the Tender Projects tab and then using the Refresh to update the Tender Document.

Figure 14.44 Tender Document - original

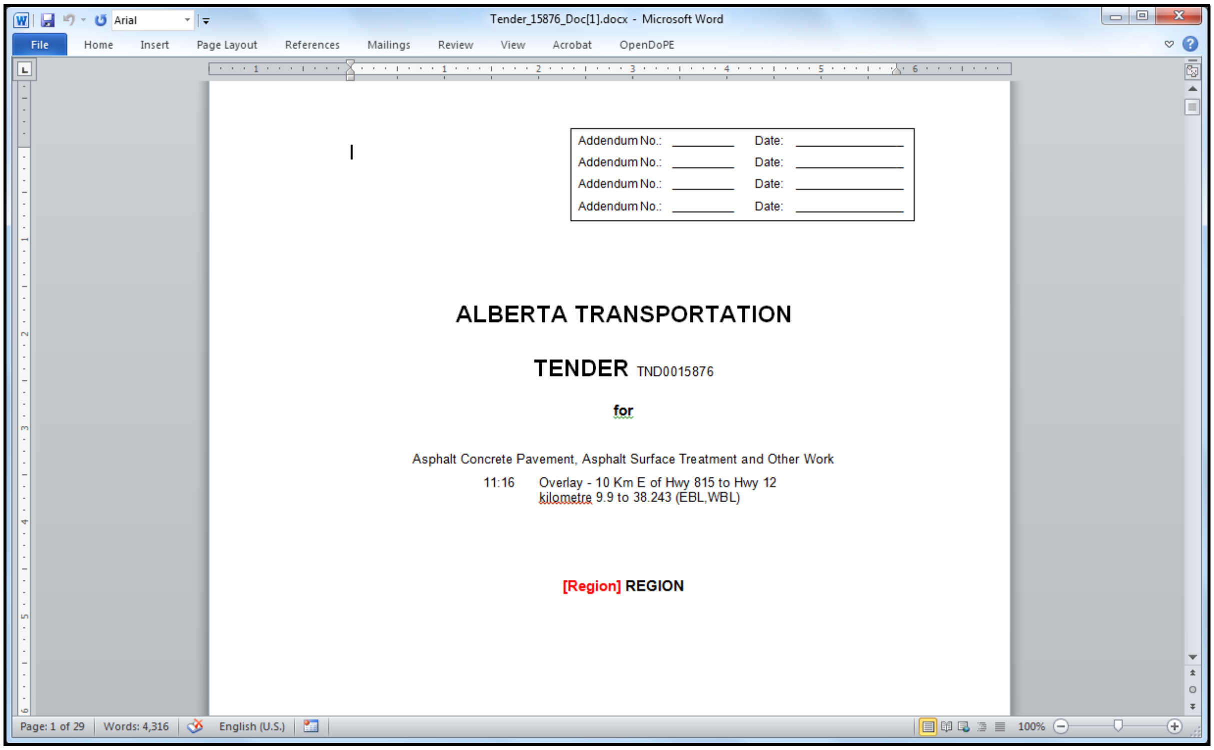


Figure 14.45 Tender Projects tab - original

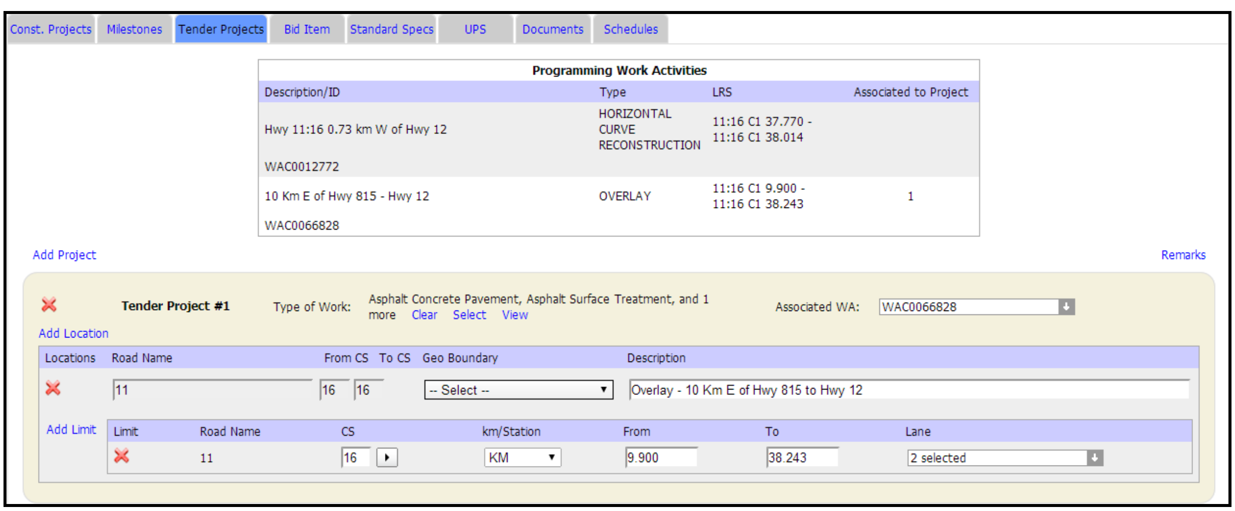


Figure 14.46 Tender Projects tab - updated

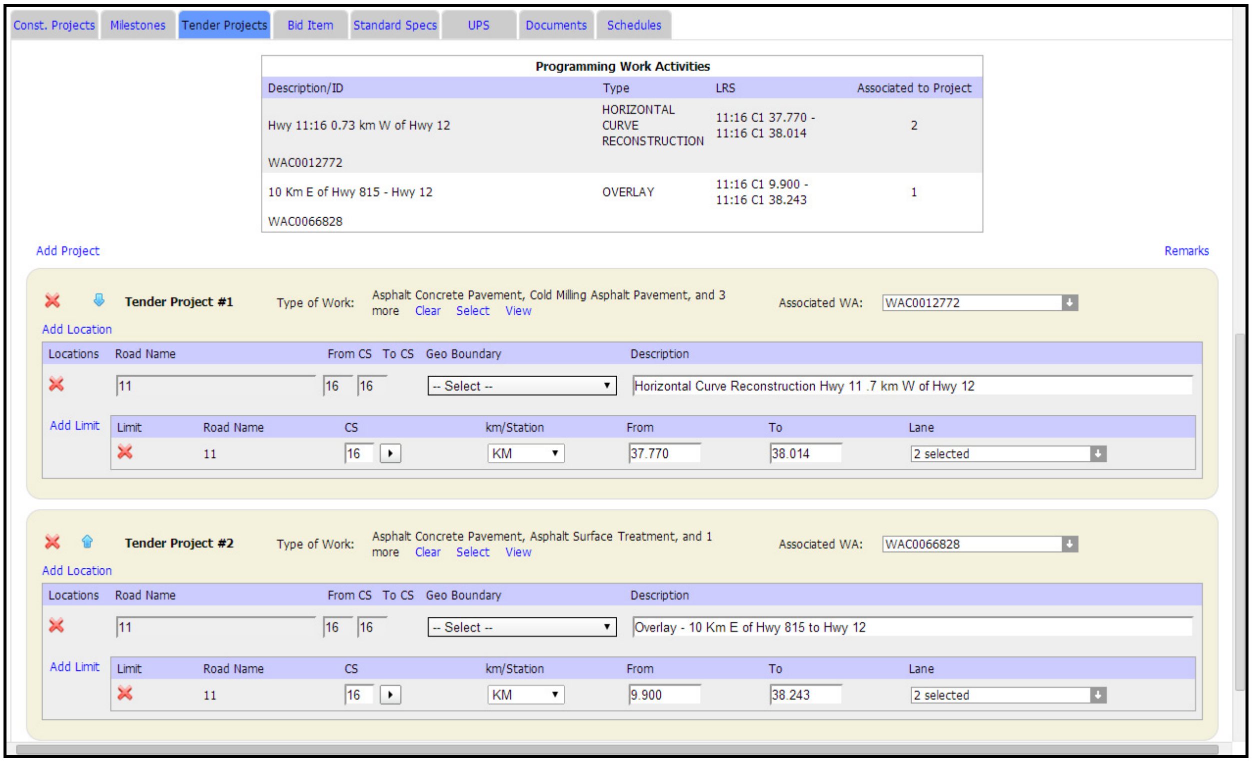
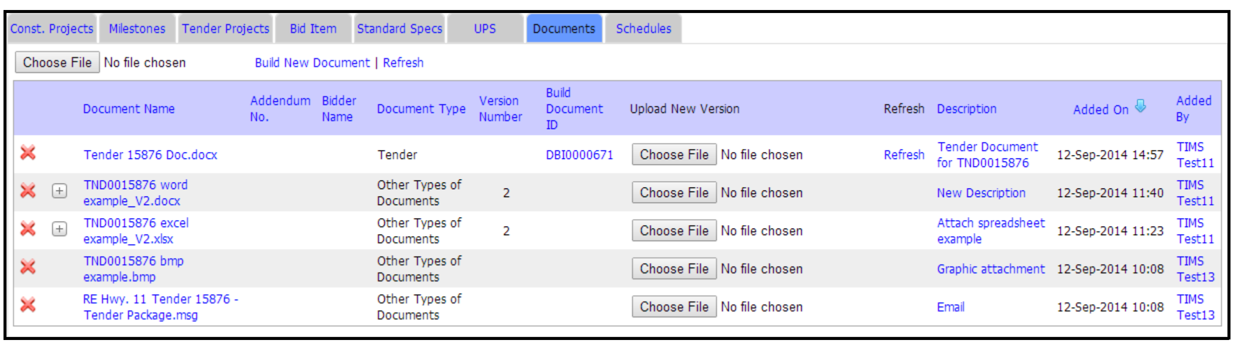


Figure 14.47 Documents tab - pre-Refresh



Selecting the Refresh link will cause the Word file to open displaying the updated document.

Figure 14.48 Tender Document - refreshed

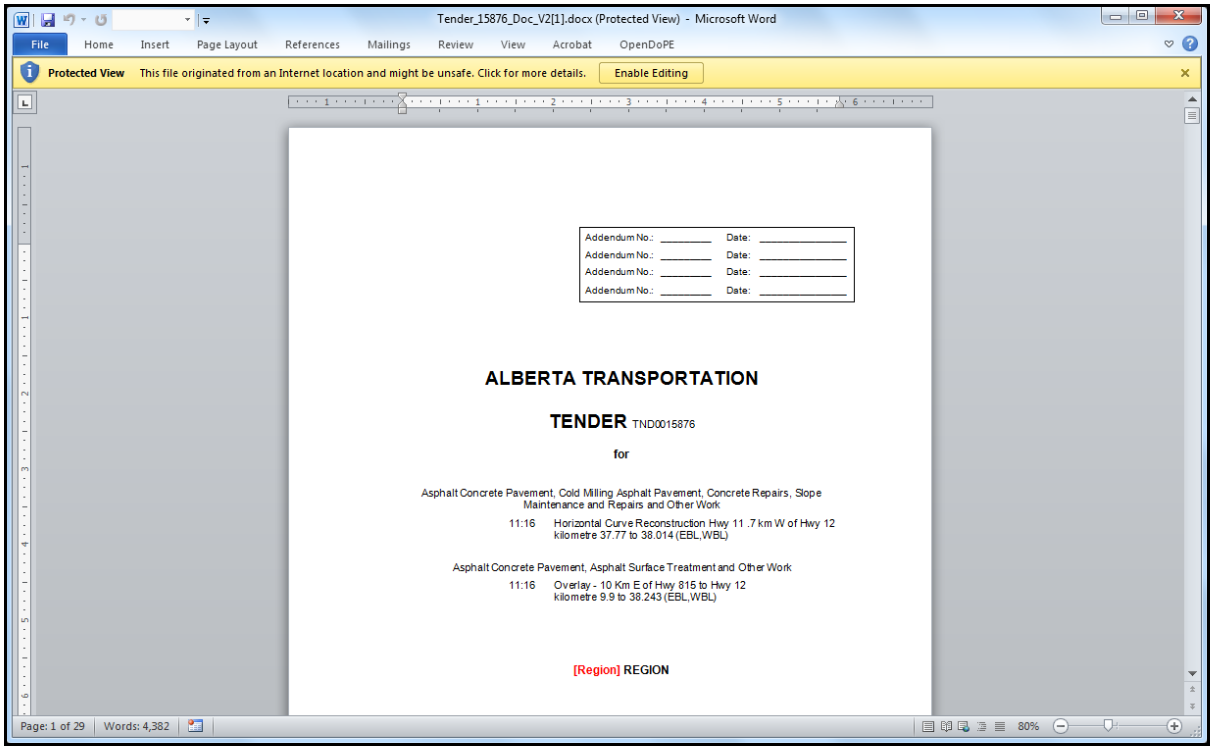
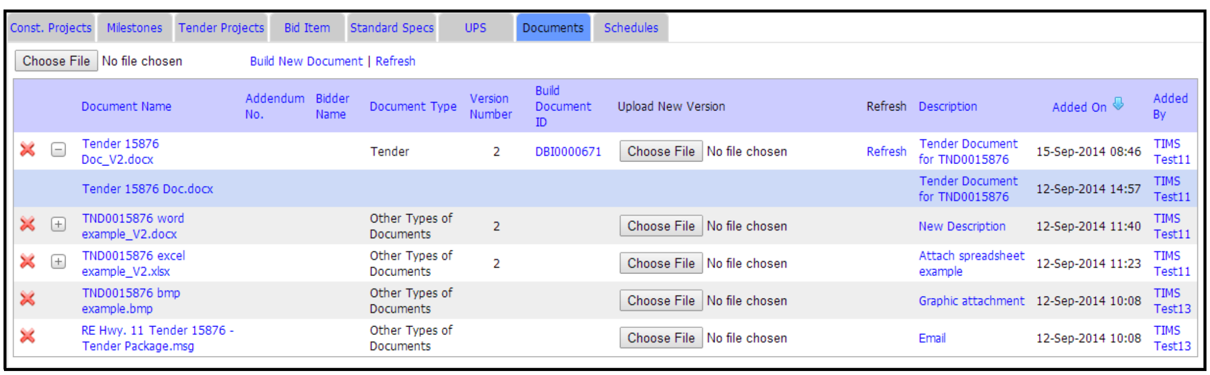


Figure 14.49 Documents tab - post-Refresh



Const. Projects | Milestones | Tender Projects | Bid Item | Standard Specs | UPS | Documents | Schedules

Choose File No file chosen Build New Document | Refresh

		Document Name	Addendum No.	Bidder Name	Document Type	Version Number	Build Document ID	Upload New Version	Refresh	Description	Added On	Added By
✖	⊟	Tender 15876 Doc_V2.docx			Tender	2	DBI0000671	Choose File No file chosen	Refresh	Tender Document for TND0015876	15-Sep-2014 08:46	TIMS Test11
		Tender 15876 Doc.docx								Tender Document for TND0015876	12-Sep-2014 14:57	TIMS Test11
✖	⊞	TND0015876 word example_V2.docx			Other Types of Documents	2		Choose File No file chosen		New Description	12-Sep-2014 11:40	TIMS Test11
✖	⊞	TND0015876 excel example_V2.xlsx			Other Types of Documents	2		Choose File No file chosen		Attach spreadsheet example	12-Sep-2014 11:23	TIMS Test11
✖		TND0015876 bmp example.bmp			Other Types of Documents			Choose File No file chosen		Graphic attachment	12-Sep-2014 10:08	TIMS Test13
✖		RE Hwy. 11 Tender 15876 - Tender Package.msg			Other Types of Documents			Choose File No file chosen		Email	12-Sep-2014 10:08	TIMS Test13

Hint: A successful Refresh of a Build Document (i.e. Tender Document) creates a new version of the document.

Remove File from Documents Tab

If a file is added to the Documents tab in error, it can be easily removed. Selecting the Remove button ( ) and then saving the Maintain Tender screen will accomplish the task. For files with versions, the current version can be removed. Once the current version has been removed the previous version becomes the current.

Figure 14.50 Documents tab - Original list

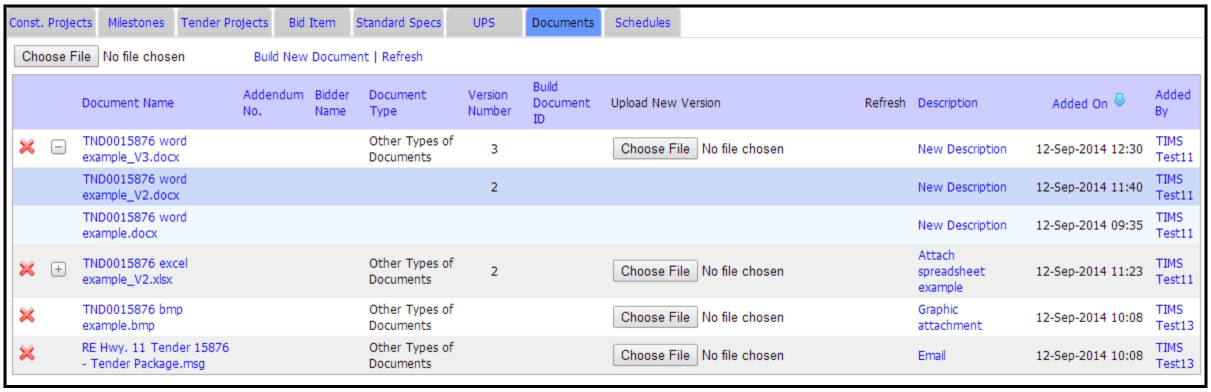
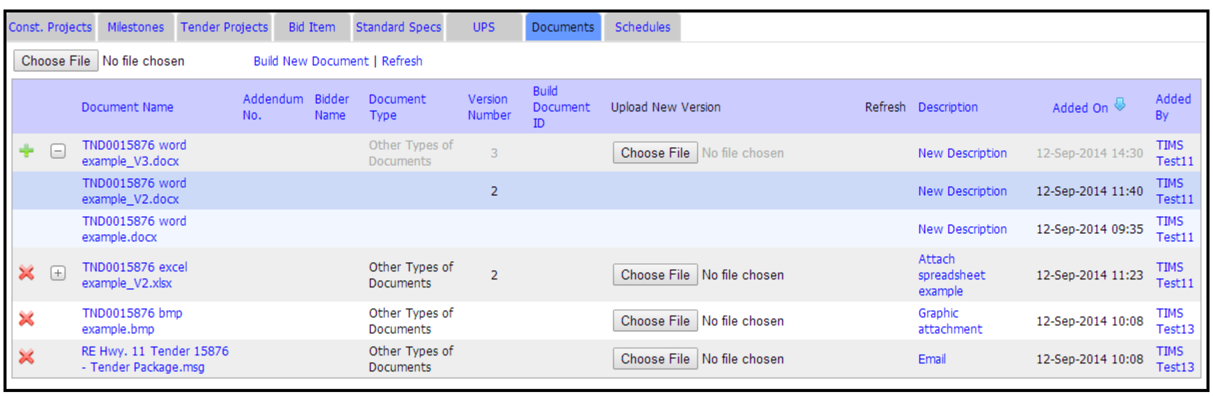
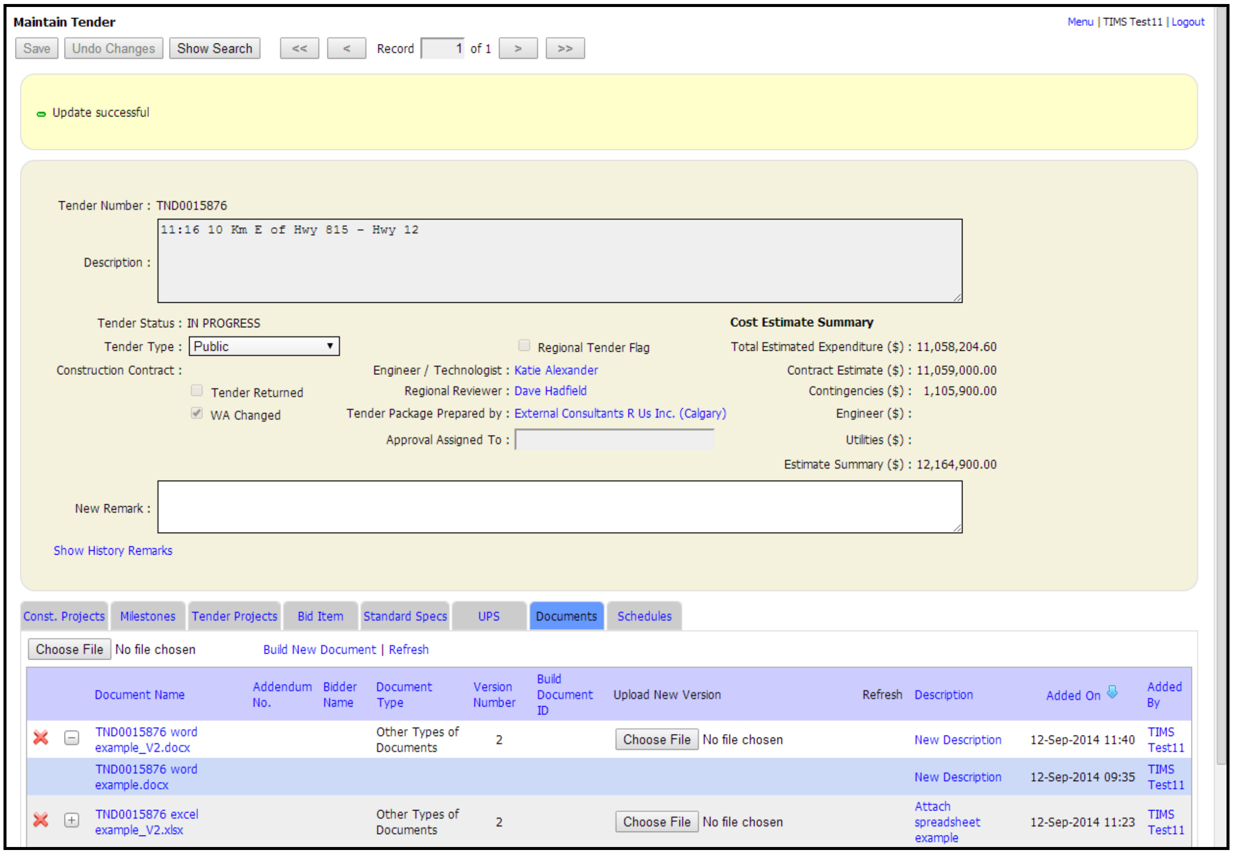


Figure 14.51 Documents tab - Remove Current Version



Alert! Any file/record/item having a green plus at the time the screen is saved, will be removed from the screen.

Figure 14.52 Documents tab - Removal Results



Chapter 15: Maintain Tender - Checklist tab

This chapter provides the definition of fields on the Checklists tab.

Topics in Chapter:

Checklists Tab

The Checklists tab is used to keep track of the tasks associated with a Tender and to ensure the standard elements of a Tender Package are present at the time of submission to the Region.

Figure 15.1 Maintain Tender screen - Checklists tab - blank

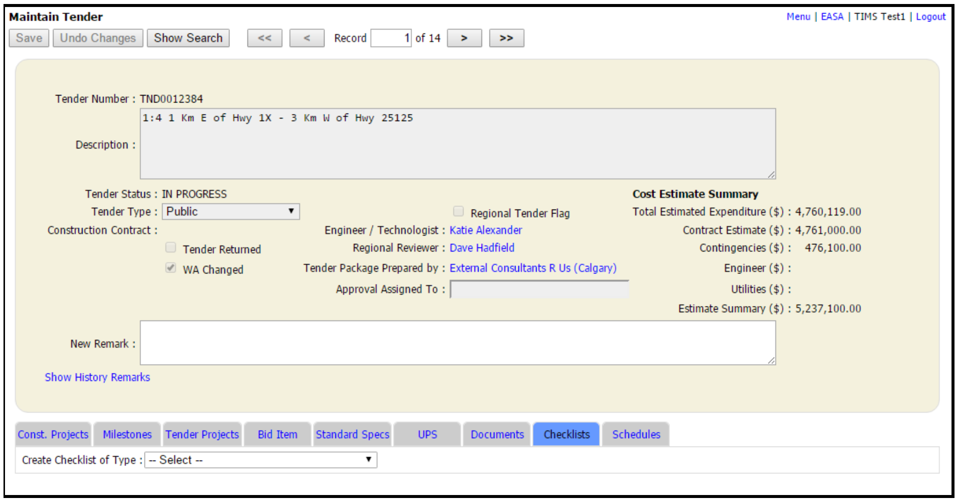


Figure 15.2 Checklist tab - Checklist Type selected

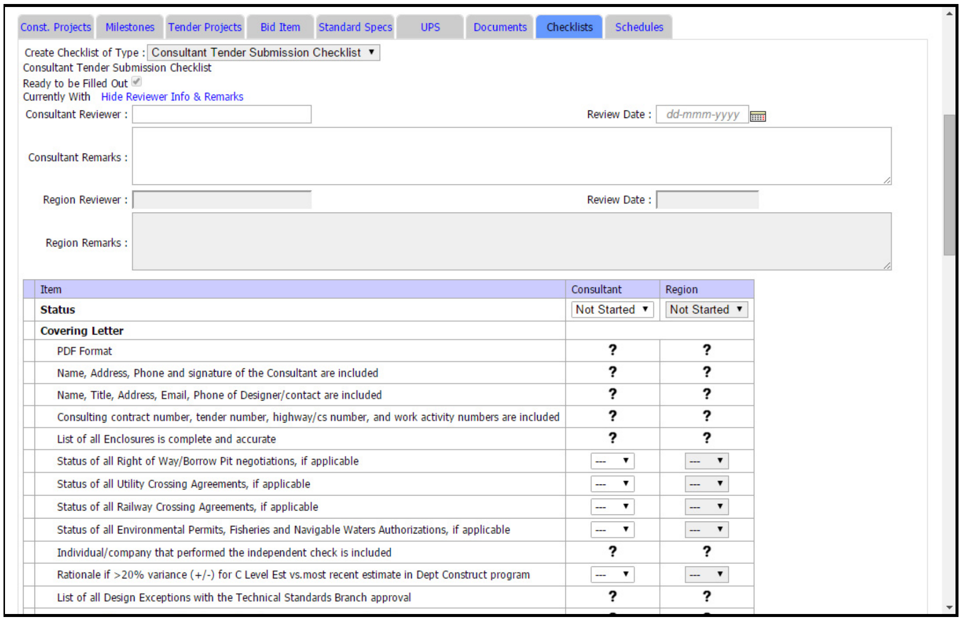


Table 15.1 Maintain Tender Checklists tab - field definitions

Field	Description
Create Checklist of Type	Displays the list of available Checklist Types.
Remove Row	Allows the user to remove the Checklist Type. A Save is required to confirm the removal.
Ready to be Filled Out	Defaulted to Checked. Not available for change by Consultants.

Figure 15.3 Checklist tab - Reviewer entered

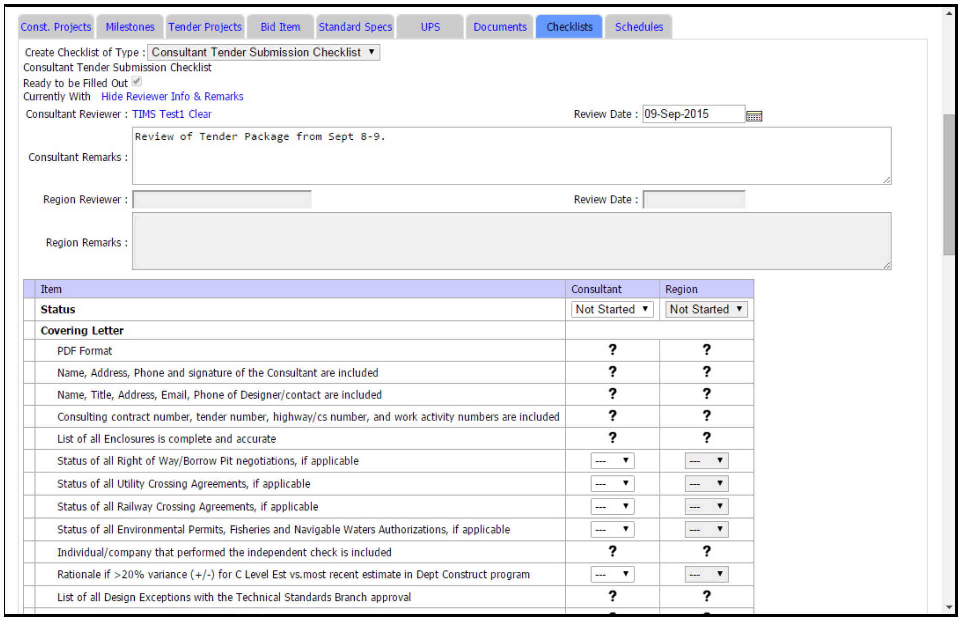
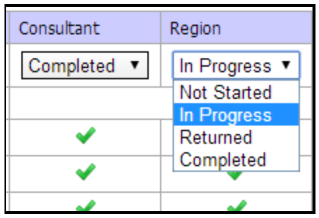


Table 15.2 Maintain Tender Checklists tab - field definitions

Field	Description
Currently with	Displays the type of user (i.e. Consultant or Regional Project Admin) with the rights to indicate if a task is checked or not.
Hide Reviewer Info & Remarks	Allows the user to hide or display the Reviewer fields.
Consultant Reviewer	An auto-suggest field used to find and display the name of the consultant performing the review.
Review Date	The date the reviewer performed the review of the Tender Package or completed the checklist.
Consultant Remarks	Allows the consultant to enter free form text describing the review and results.
Regional Reviewer	An auto-suggest field used to find and display the name of the Project Administrator performing the review.
Review Date	The date the reviewer performed the review of the Tender Package or completed the checklist.
Regional Remarks	Allows the Project Administrator to enter free form text describing the review and results.
Status	Allows the reviewer to change the status of the Checklist. ◆ Not Started (default) ◆ In Progress ◆ Returned (region only) ◆ Completed

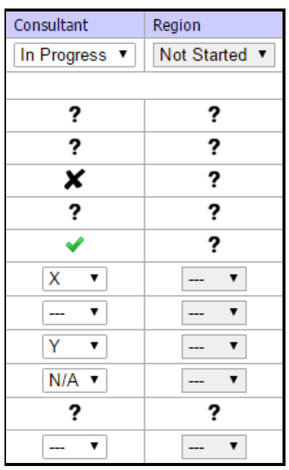
Figure 15.4 Checklist tab - Region Status options



Hint: Each Reviewer can make entries on the Checklist at the same time.

Depending on the Value Type used when the Tasks were created. The reviewers click question marks, cycling through the available responses (Y-Yes, X-No) until the appropriate response is displayed. From the drop down the user has the choice of: Y-Yes, X-No, N/A- Not applicable.

Figure 15.5 Checklist tab - Value Type example



Chapter 16: Create Checklist for Tender

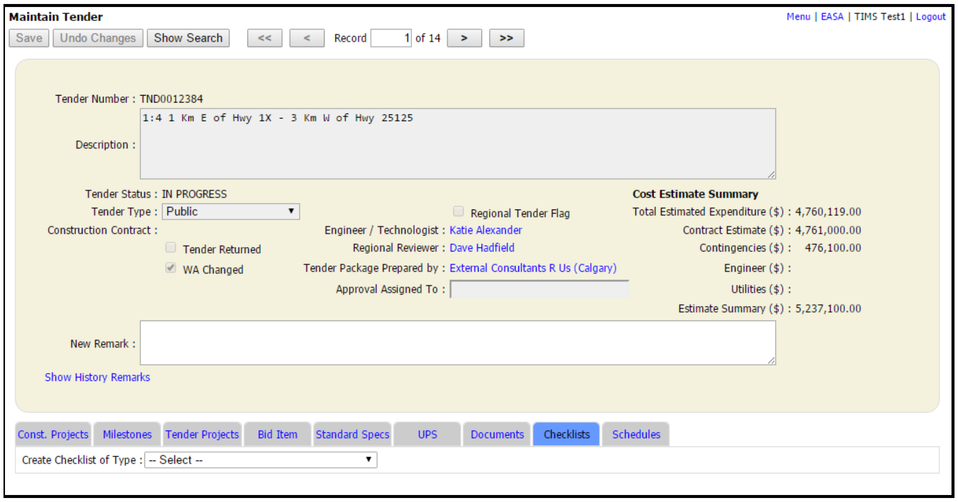
This chapter provides the information required to create and complete a Checklist. The Maintain Tender screen will be used in the examples.

Topics in Chapter:

Create a Checklist

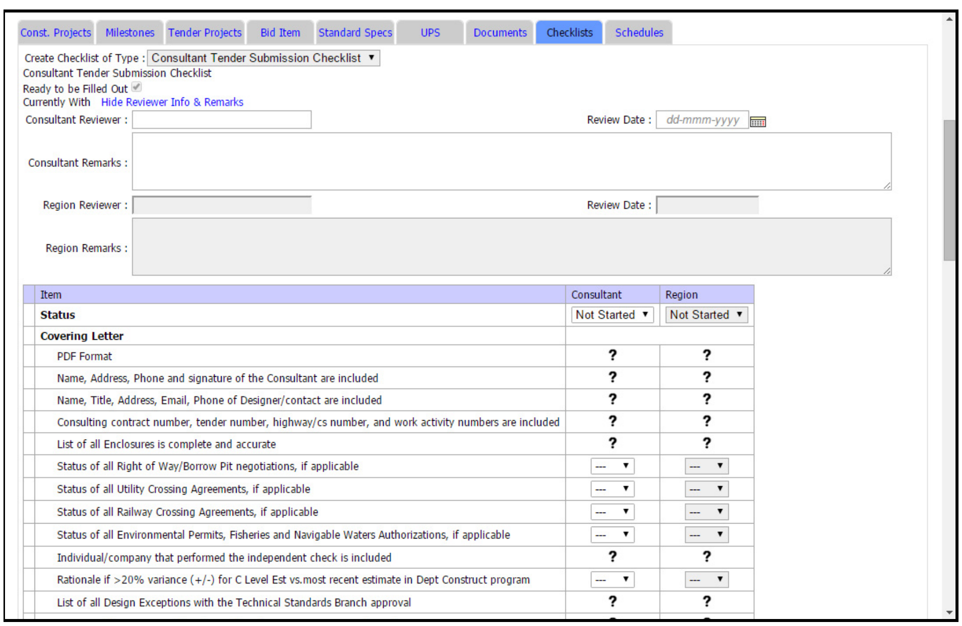
Creating a checklist for a Tender is a matter of selecting the Checklist Type that contains the Tasks that are important to the Tender.

Figure 16.1 Checklist tab - blank

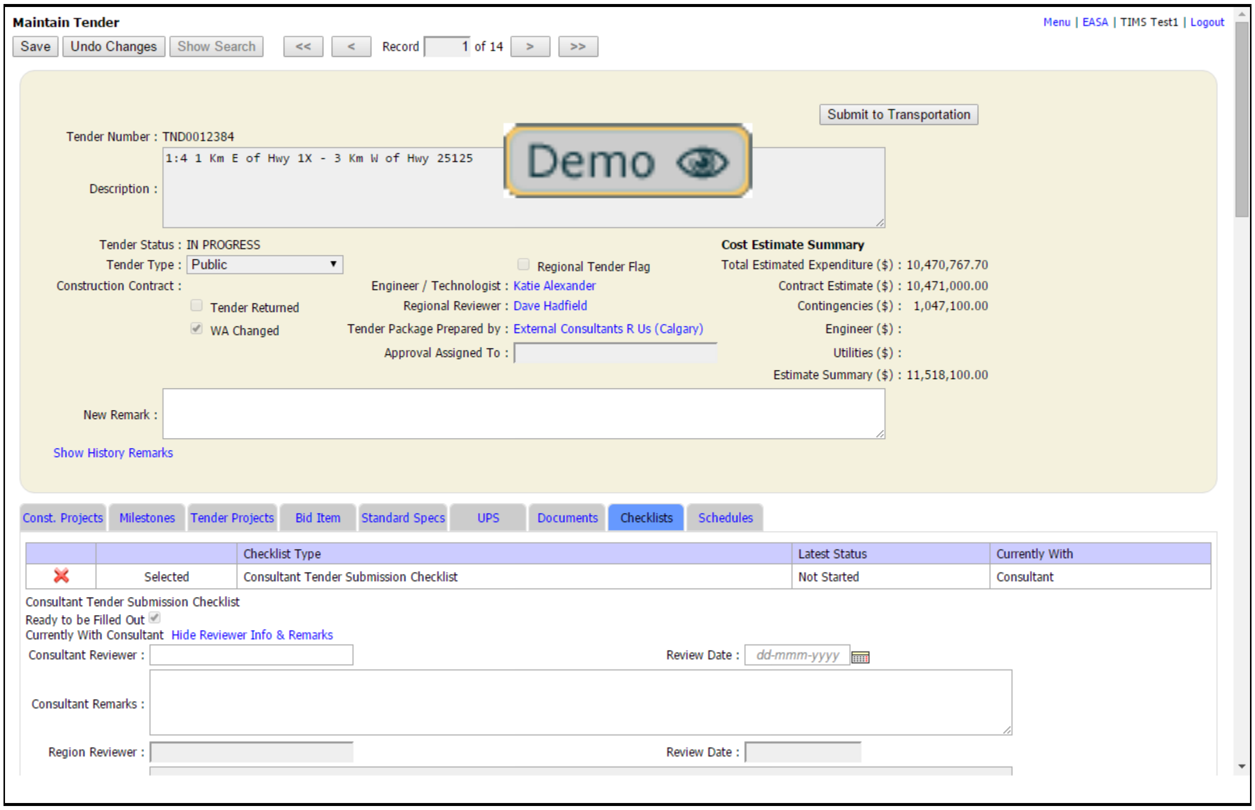


After selecting a Checklist Type the user (i.e. Consultant or Project Administrator) can enter the name of the reviewer, the date of the review and any remarks that may be applicable, in the appropriate fields (i.e. consultant or region).

Figure 16.2 Checklist tab - Checklist Type selected



Demo 16.1 Create a Tender Checklist



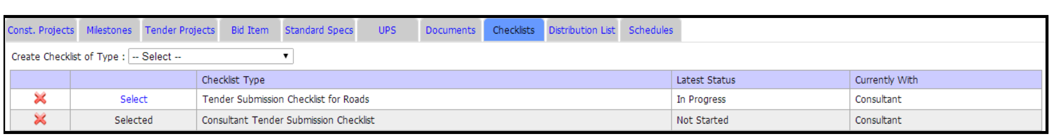
How To

1. From the *Checklists* tab select a **Checklist Type** from the drop down.
2. From the *Maintain Tender* screen select the **Save** button.

Multiple Checklists

It is possible to create a Checklist based on more than one Checklist Type. The Create Checklist of Type drop down is always available and subsequent selections are added. However, only one checklist can be worked on at a time. The user must click on the Select link to change from one checklist type to another.

Figure 16.3 Multiple Checklist Types



Review Checklist

Any updates to the Items listed are the responsibility of the Reviewers (Consultant and Region). The reviewers click question marks, cycling through the available responses (Y-Yes, X-No) until the appropriate response is displayed. From the drop down the user has the choice of: Y-Yes, X-No, N/A- Not applicable.

Figure 16.4 Consultant Reviewer - Not Started

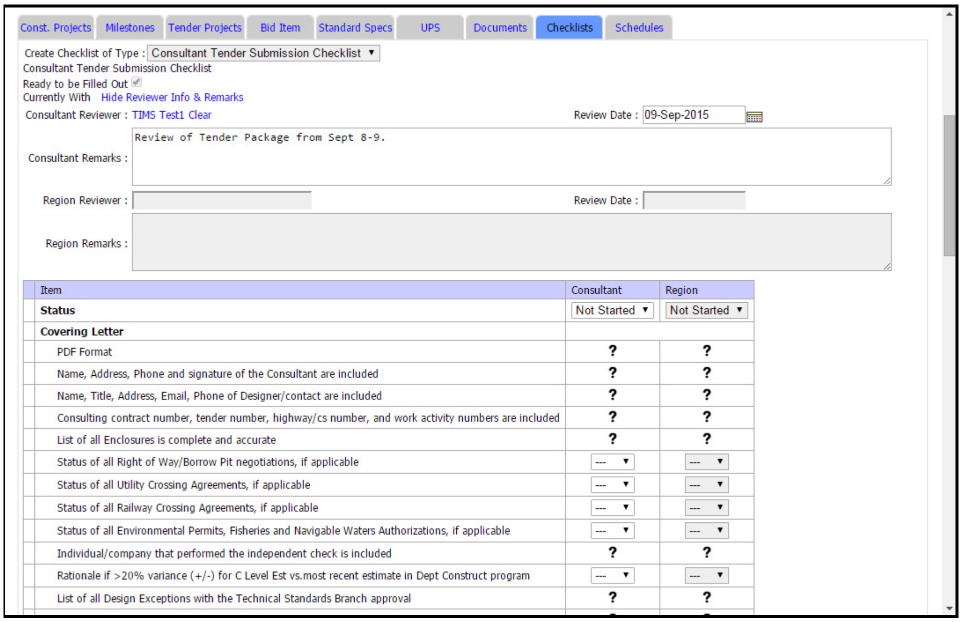
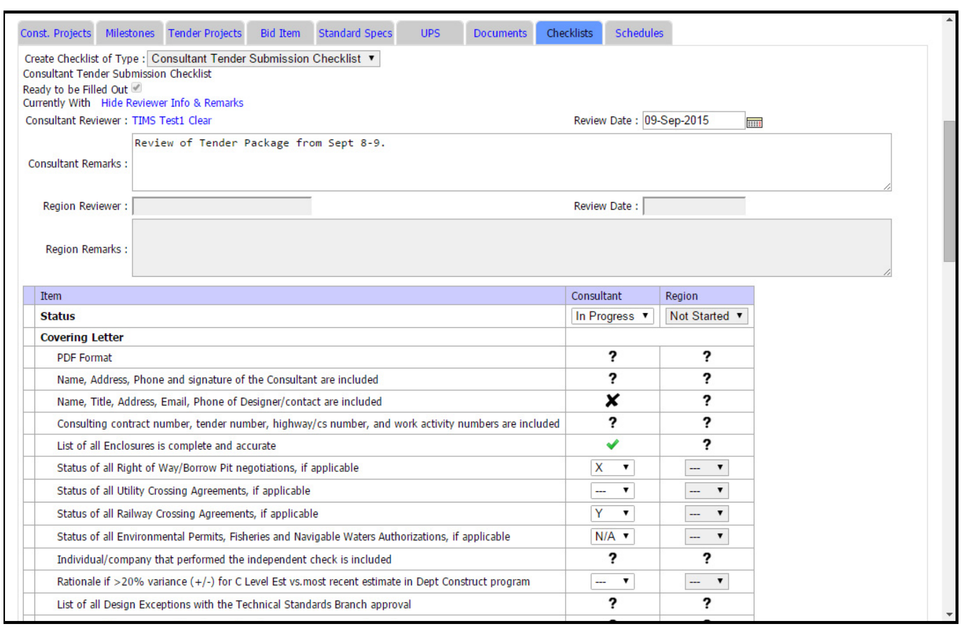
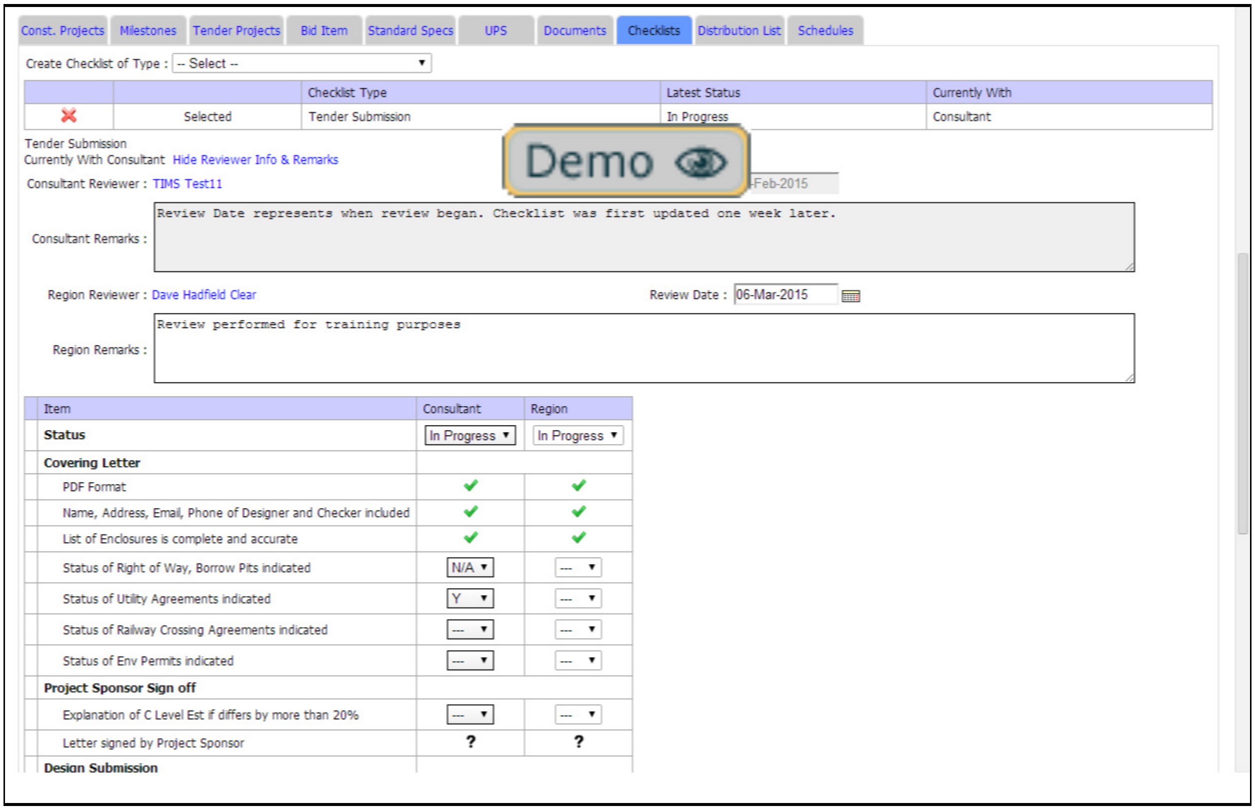


Figure 16.5 Region Reviewer - In Progress



Demo 16.2 Review a Checklist



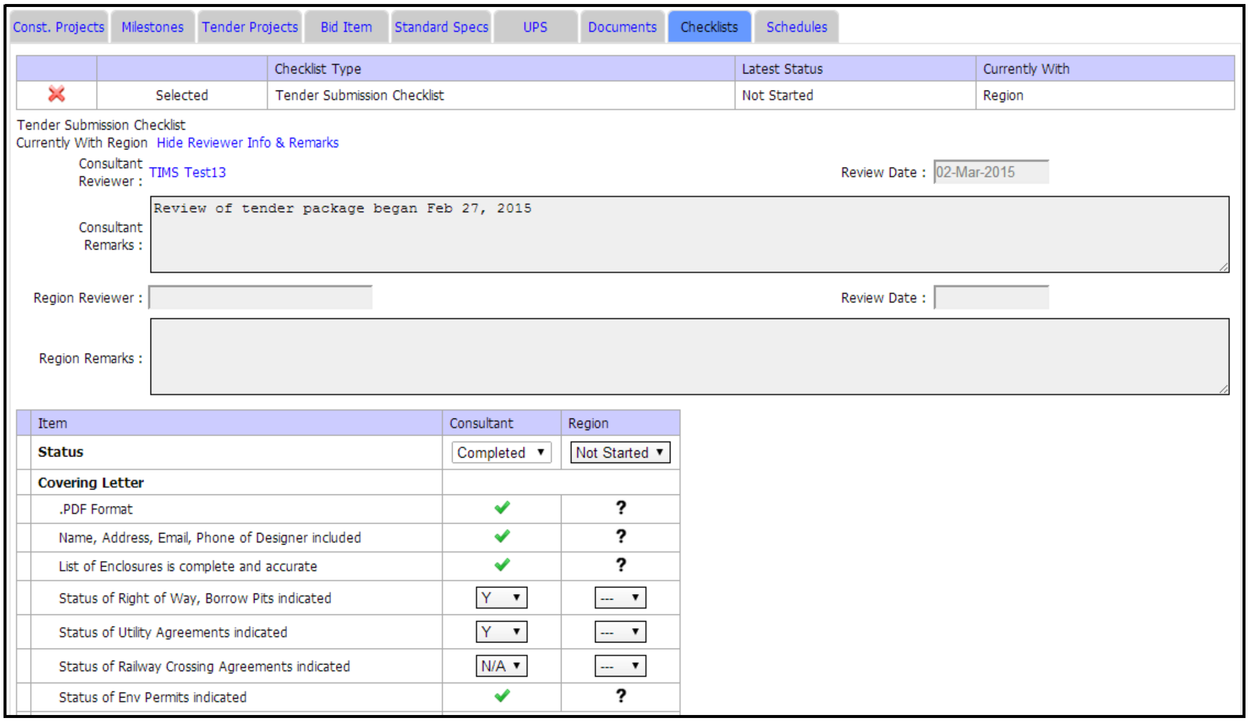
How To

1. From the *Checklists* tab, in the Active column, select the **Status** drop down.
2. Select the **In Progress** status from the drop down.
3. For each *Task* select the **Value Types** to set the appropriate value (pass, fail, n/a).
4. From the *Maintain Tender* screen select the **Save** button.

Complete Tender Checklist

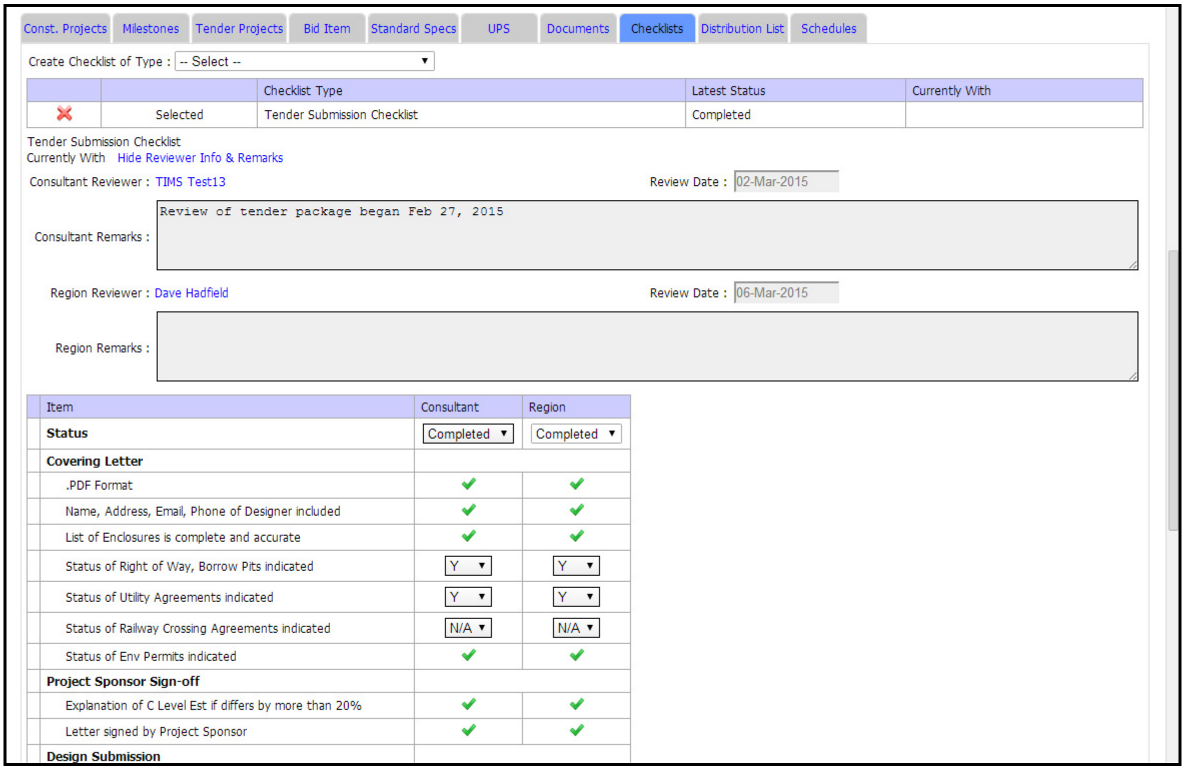
Once a reviewer completes their entry they set the Status to Completed. The Latest Status value changes along with the Currently With value. Figure 16.6 below shows that the Consultant has completed the Checklist which now rests with the Region.

Figure 16.6 Consultant Completed Checklist

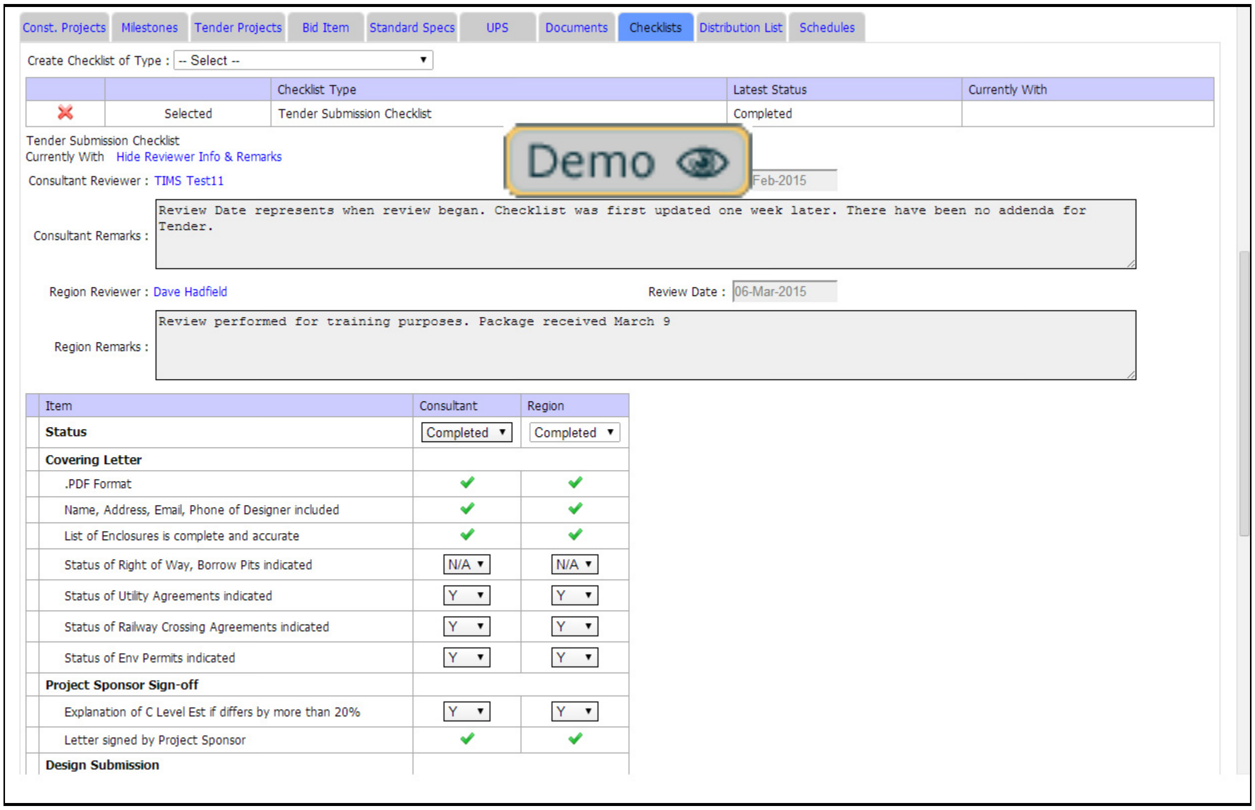


In Figure 16.7 below both reviewers have set their status to Completed.

Figure 16.7 Completed Checklist



Demo 16.3 Complete a Checklist



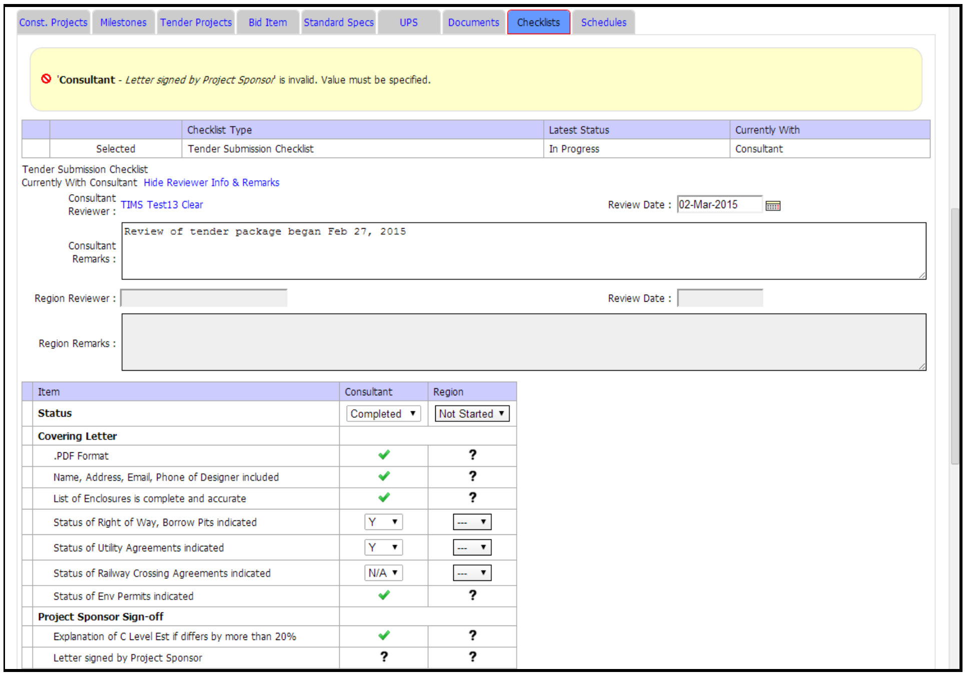
How To

1. From the *Checklists* tab, in the Active column, select the **Status** drop down.
2. Verify all *Tasks* have **Value Types** set to an appropriate value (pass, fail, n/a).
3. Select the **Completed** status from the drop down.
4. From the *Maintain Tender* screen select the **Save** button.

Completion Error

All of the tasks listed in the Checklist must have a response of some kind (Pass, Fail, N/A). The default question mark (?) cannot be ignored to successfully complete a checklist. Figure 16.8 below shows that the Consultant has not selected a value for the 'Letter signed by Project Sponsor' task and therefore, cannot complete their portion of the Checklist.

Figure 16.8 Checklist Completion Error



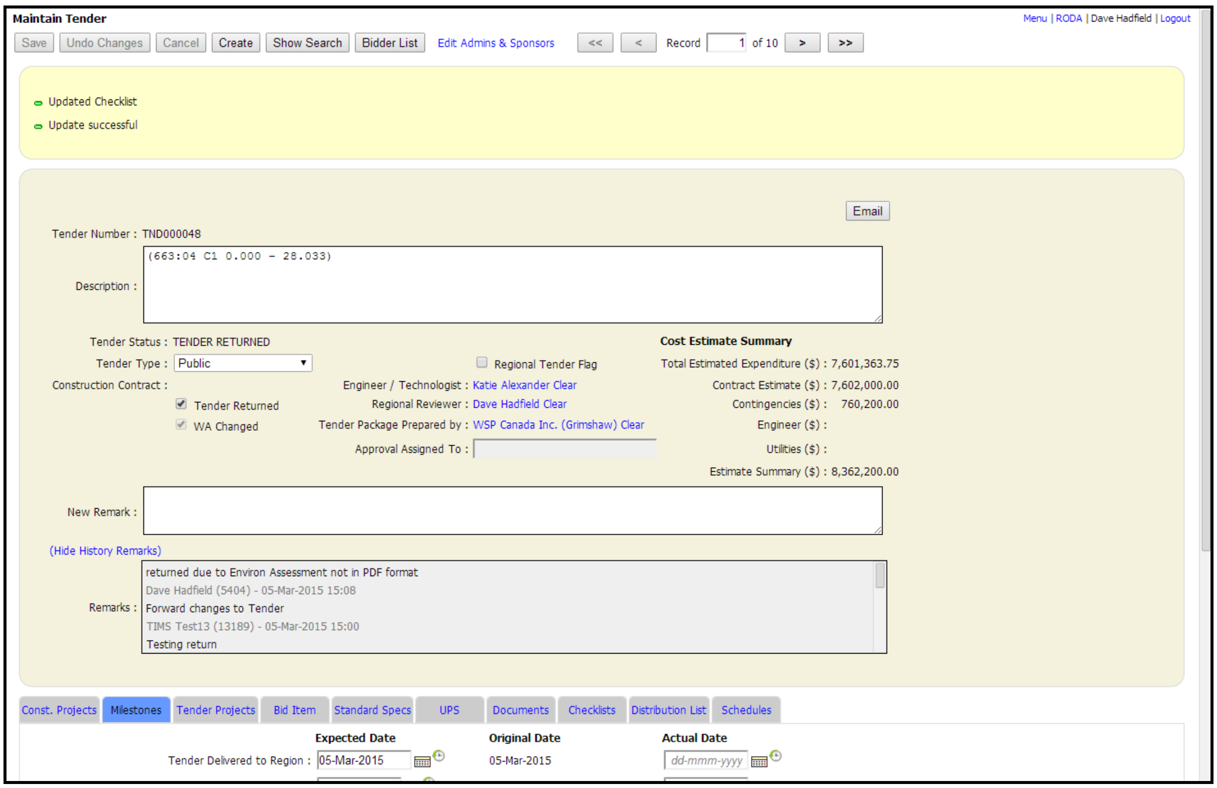
Return a Checklist

If the Region determines that the Tender Package needs to be returned to the Consultant (which would include potential updates to the checklist in PMA Delivery) specific actions are required by the region.

Region Steps to Return

If the Consultant has Submitted the Tender in PMA Delivery (i.e. Tender Status = Region Review) the following steps are required by the Region in order for the Consultant to make changes on the Checklist tab.

Figure 16.9 Submitted Tender Returned

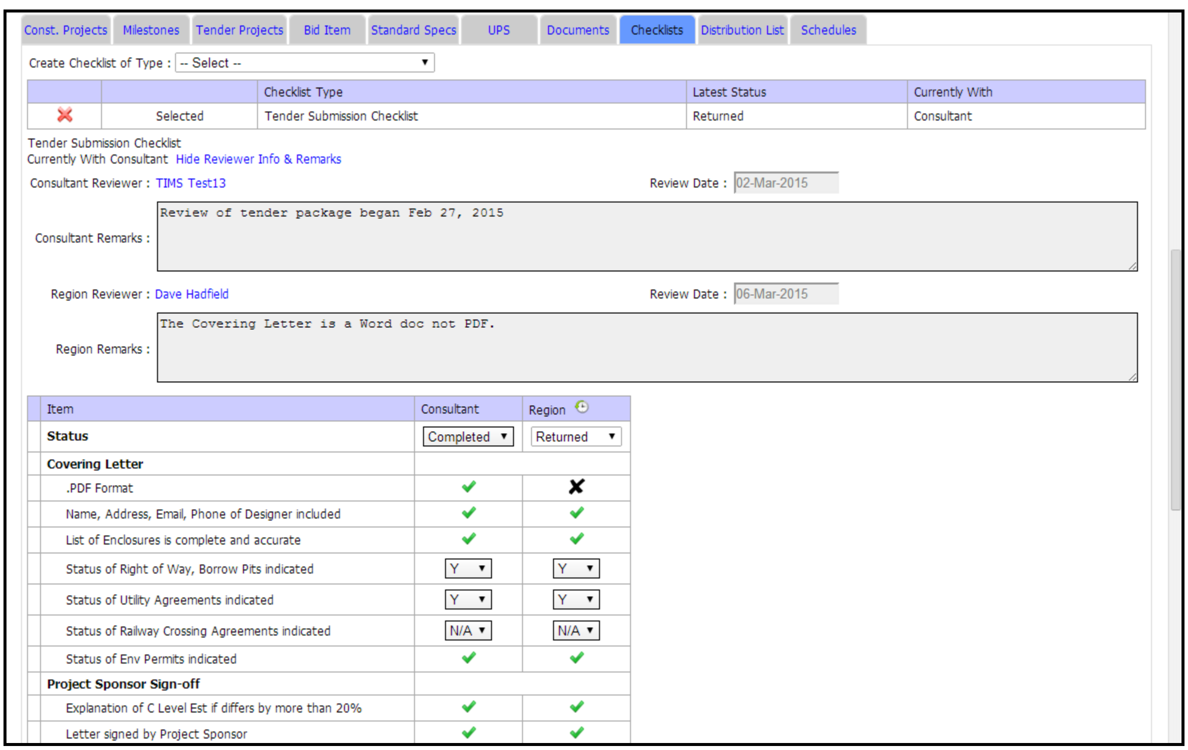


If the Tender has not been submitted in PMA Delivery the region can begin at step #5 below.

How To

1. From the *Milestones* tab remove the **Actual Tender Delivered to Region** date.
2. From the *Maintain Tender* screen, click to check the **Tender Returned** box.
3. Enter a reason for the **Return** in the *New Remarks* field.
4. Save the *Maintain Tender* screen.
5. From the *Checklist* tab, indicate the affected task(s) with a Fail value.
6. Enter a reason for the failure in the **Region Remarks** field.
7. Set the *Status* to **Returned** in the Region column.
8. Save the *Maintain Tender* screen.
9. From the *Maintain Tender* screen select the **Email** button.
10. Send an Email notification to the Consultant.

Figure 16.10 Region Returned Checklist



Consultant Steps to Correct

Once the consultant has remedied the issue, they can enter PMA Delivery and perform the following steps:

How To

1. If updates are required on the Checklist tab:
   a) In the *Consultant* column, set the *Status* to **In Progress**.
   b) Make the necessary changes to Task values.
   c) Set the *Status* to **Completed**.
2. From the *Maintain Tender* screen, select the **Submit to Transportation** button.
3. Type a note in the **New Remark** field.
4. Select the **Save** button.
5. Send the Regional Reviewer an **Email**.

Chapter 17: Tender Delivered to Region

When the Consulting Engineer submits the tender package to the region (Regional Reviewer), the Project Administrator conducts a review of the package and if acceptable, forwards the package to Transportation's Tender Services group. If changes are required, the consultant is notified. Although this chapter covers steps performed by the Regional Reviewer, it is important for the consultant to understand how to find the results of the review. Sections of this chapter performed by the Regional Reviewer are clearly marked.

Topics in Chapter:

1. Submit Tender Package
2. Receive Tender Package (Regional Reviewer)
3. Review Submitted Tender Package (Regional Reviewer)
4. Return Tender Package to Consultant (Regional Reviewer)
5. Re-Submit Tender to Transportation
6. Tender Document Review Initiated 'Actual Date'

Submit Tender Package

When the tender package (draft or final) is ready to be submitted to the Transportation Project Sponsor for review, the following steps should be covered:

- Only an external consultant with the PMA Delivery Submit Tender security role can Submit a Tender.
- A review of all relevant tabs on the Maintain Tender screen should be conducted prior to submitting:
  - Construction Projects tab: do all Work Activities have a Tender Bid Item?
  - Tender Projects tab: have projects been created as required for the tender design?
  - Bid Item tab: have all Bid Items and estimated quantities and prices been created to meet the tender design? Do all created Tender Bid Items have a status of Completed?
  - UPS tab: have all UPS Sections been created to meet the tender design? Do all UPS Sections have a status of Completed?
  - UPS Evaluation Format tab: if multiple UPS Sections have been created, do the required UPS Section combination exist?
  - Documents tab: have all required files been attached? Is the current Tender Document correct?
  - Checklists tab: does the Consultant column have a Status of Completed?

Alert! Consultants, once the Tender Package is submitted - Do Not - change any tabs or the Tender Document until instructed to do so by the regional Project Administrator.

Hint: When the tender is successfully submitted, the Tender Delivered to Region ‘Actual’ Date will be automatically entered with the current date.

The Milestones tab will be automatically updated once the submission of the tender is successful. After the Tender is submitted, the Tender Delivered to Region ‘Actual Date’ will be populated and locked. The Build Document ID on the Documents tab will also be locked so that the tender document can no longer be Rebuilt.

Figure 17.1 Submit Tender screen – Milestones tab - pre Submit

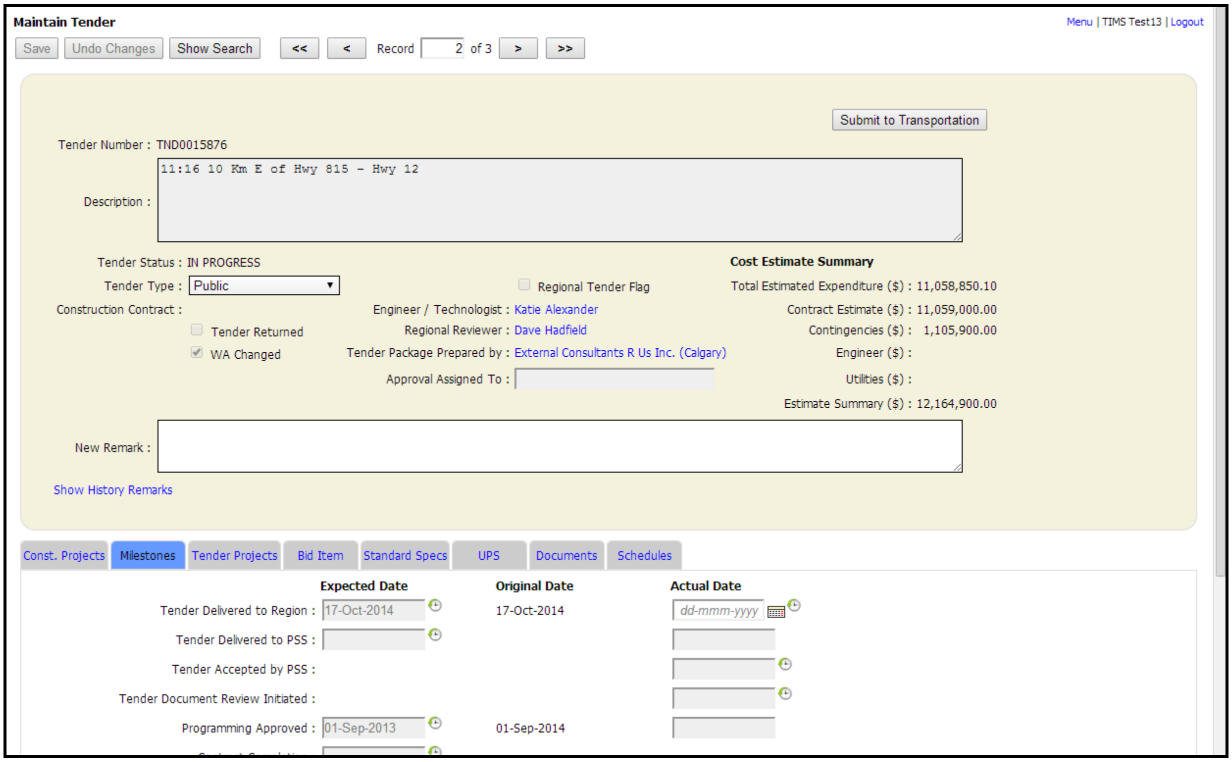


Figure 17.2 Submit Tender screen – Documents tab - pre Submit

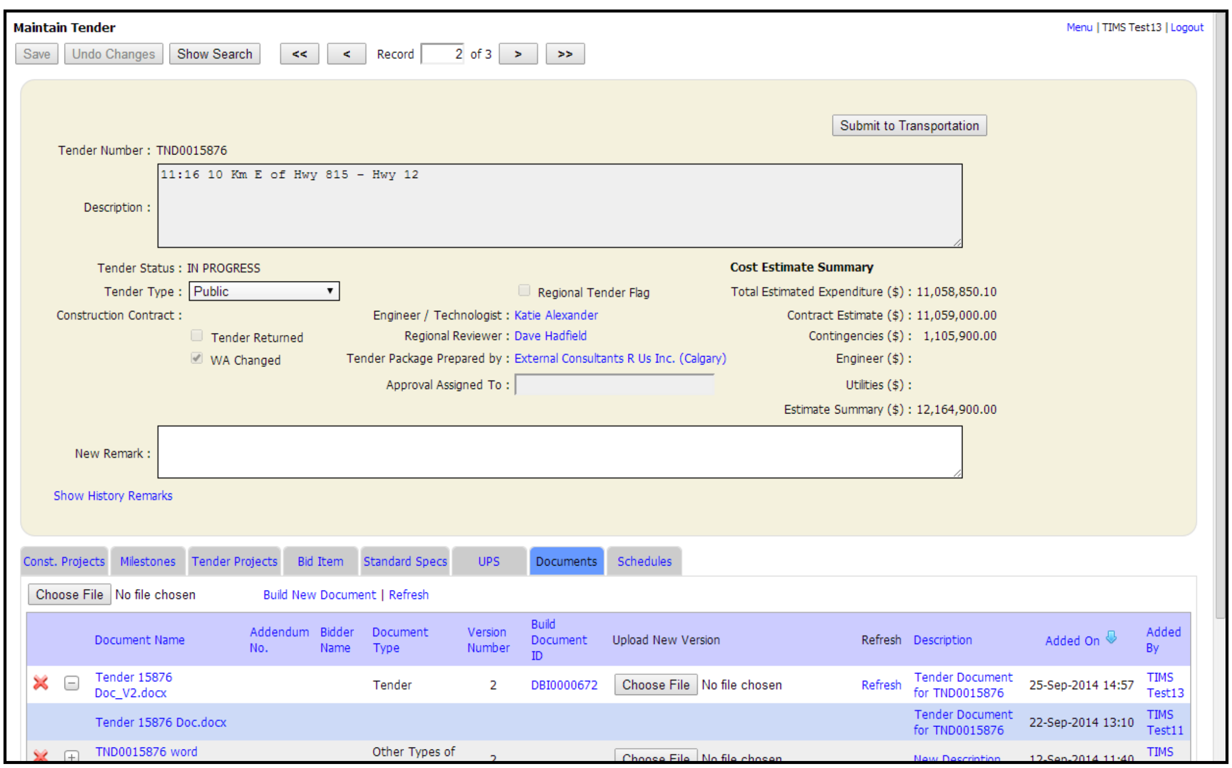


Figure 17.3 Submit Tender screen – Milestones tab - post Submit

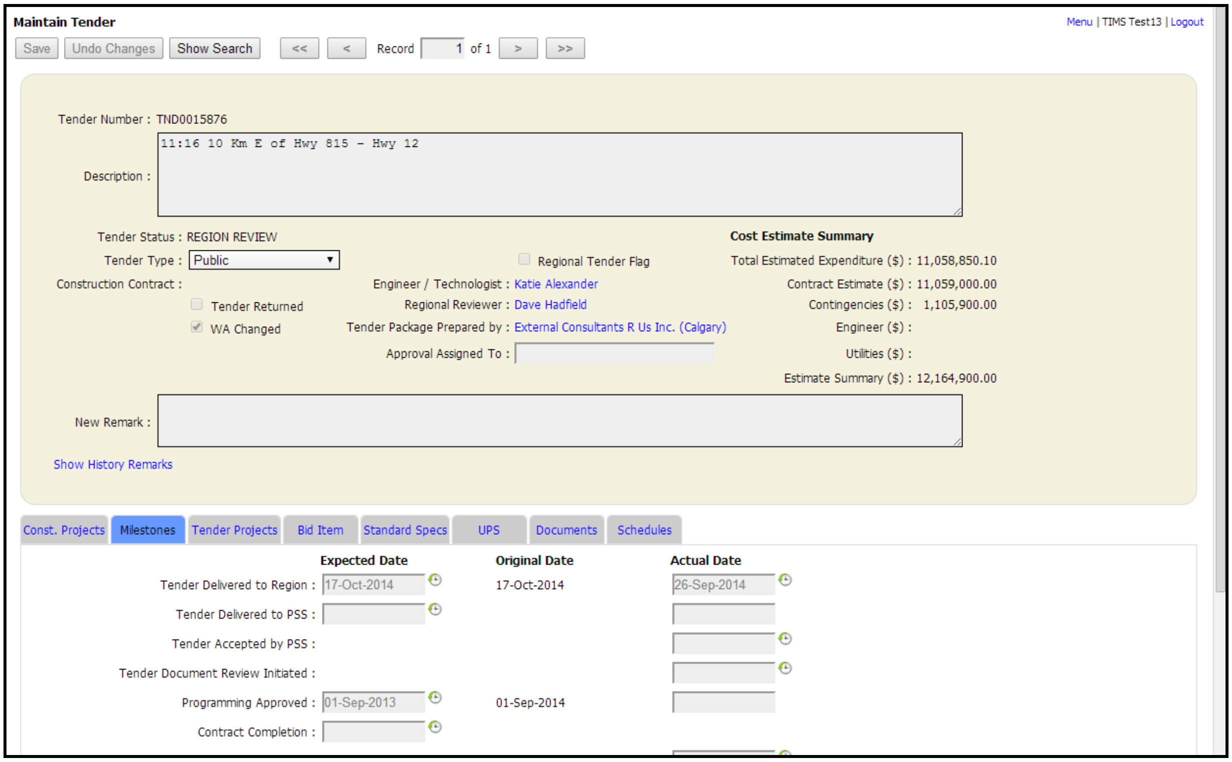
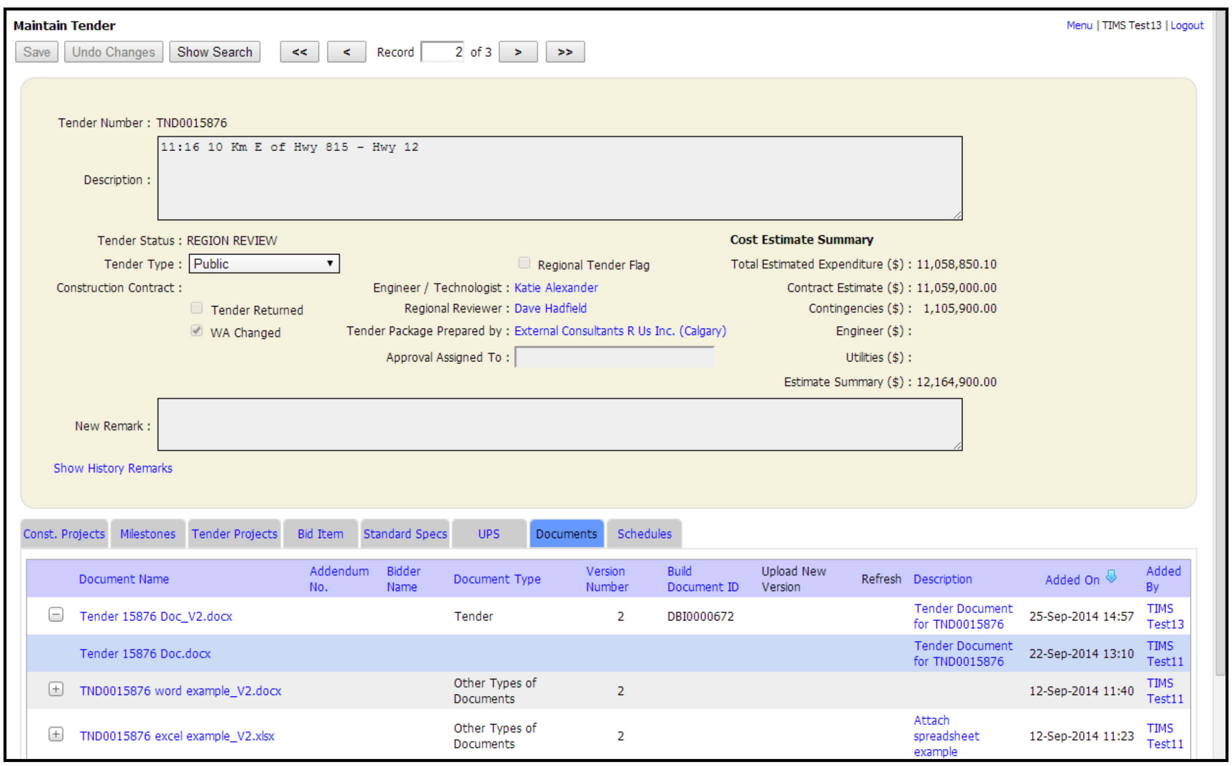
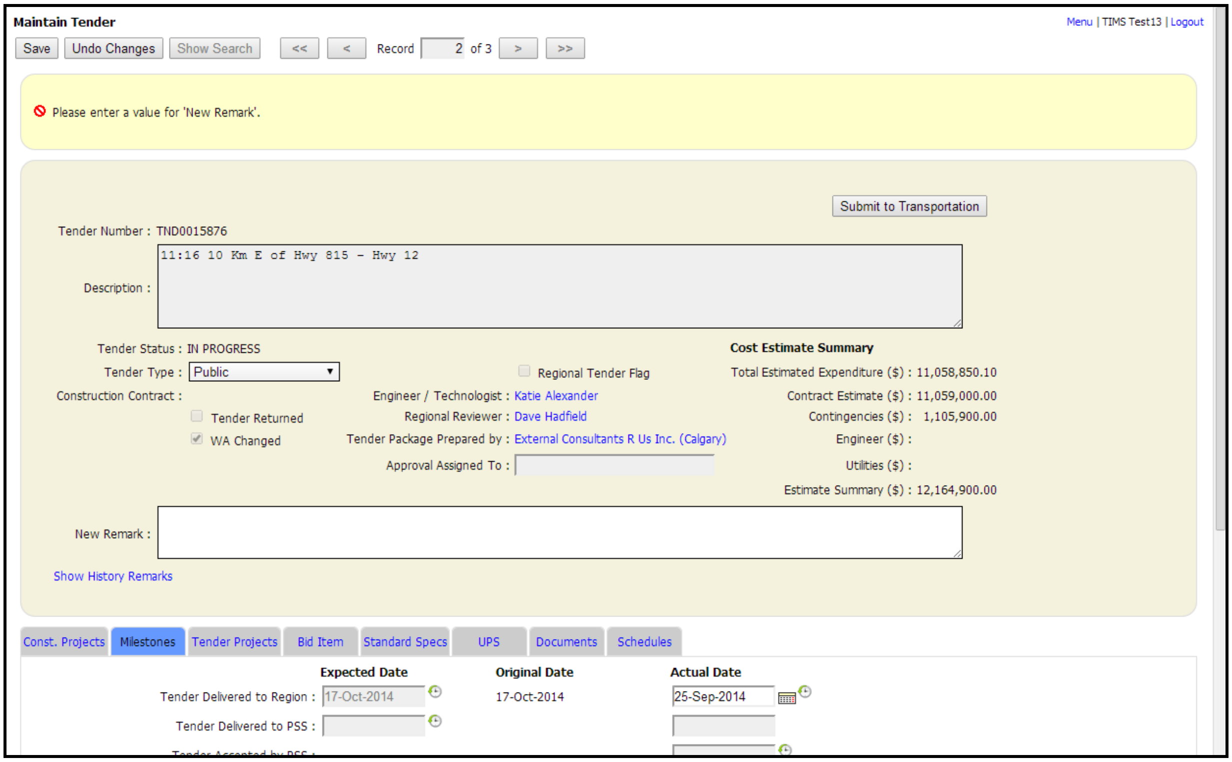


Figure 17.4 Submit Tender screen – Documents tab - post Submit



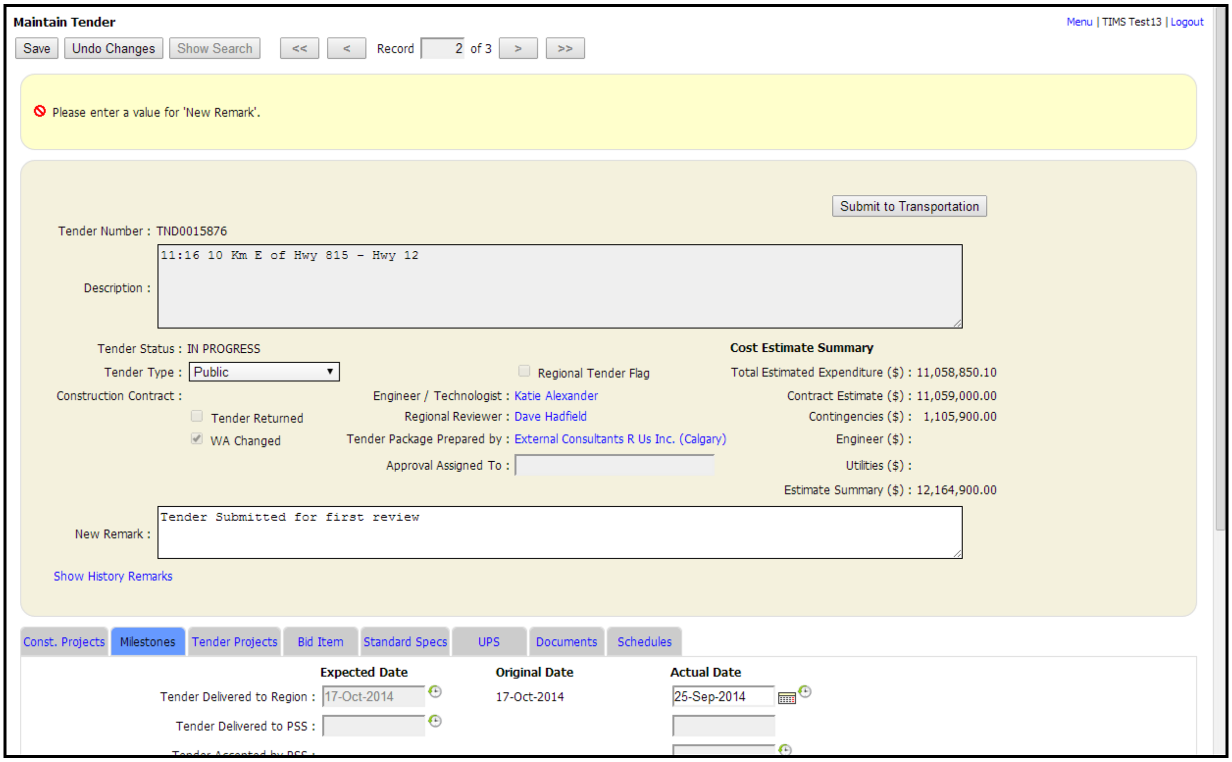
After selecting the Submit to Transportation button the consultant needs to save the Maintain Tender screen. However, when a Tender is submitted, a Milestone date is automatically entered. Any changes to the Milestones tab requires a Remark - even if the entry is automated. Therefore, a New Remark is required before a Save will be successful.

Figure 17.5 Submit Tender screen – New Remark msg



Alert!	A New Remark must be entered prior to saving the submitted tender.

Figure 17.6 Submit Tender screen – New Remark example



When the Maintain Tender screen is successfully saved, a Create Email window will display. This window assists the consultant in sending a notification to the Regional Reviewer.

Alert! If an email notification is not sent to the Transportation Regional Reviewer regarding the submitted Tender, the review will not start.

Figure 17.7 Submit Tender screen – Create Email window

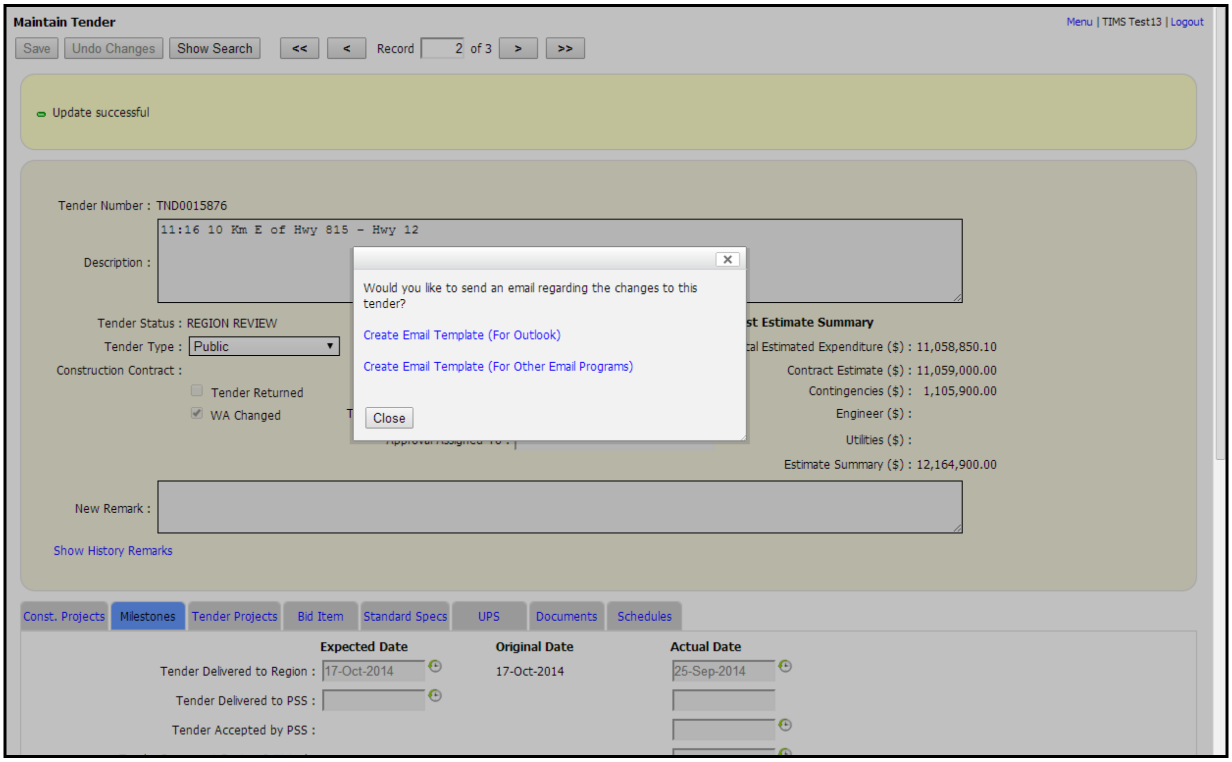
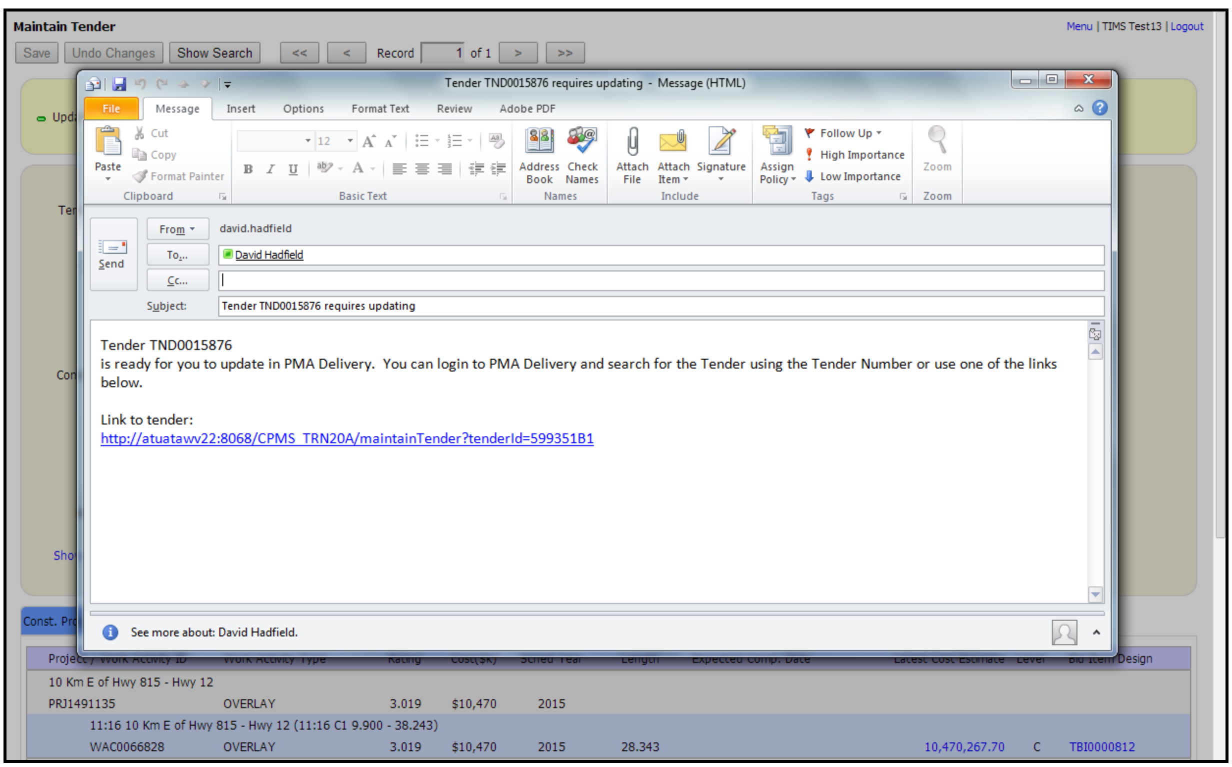
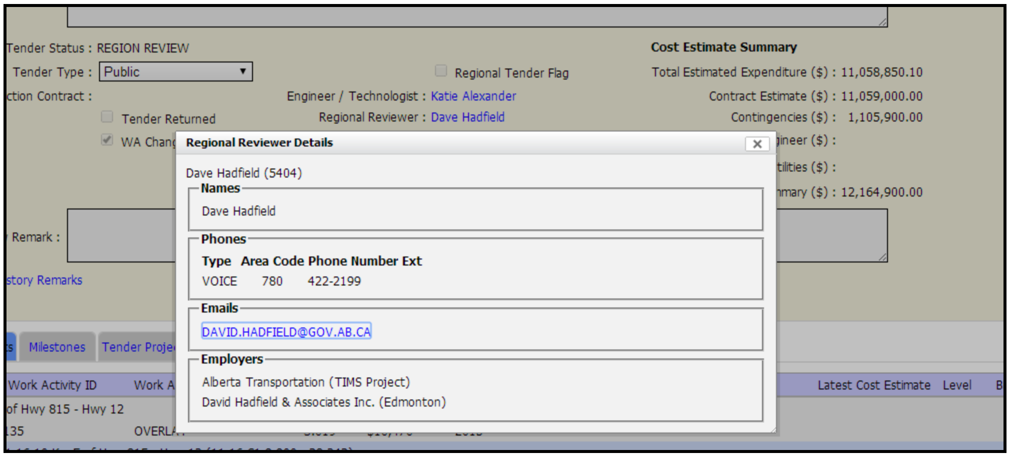


Figure 17.8 Submit Tender screen – Email Message

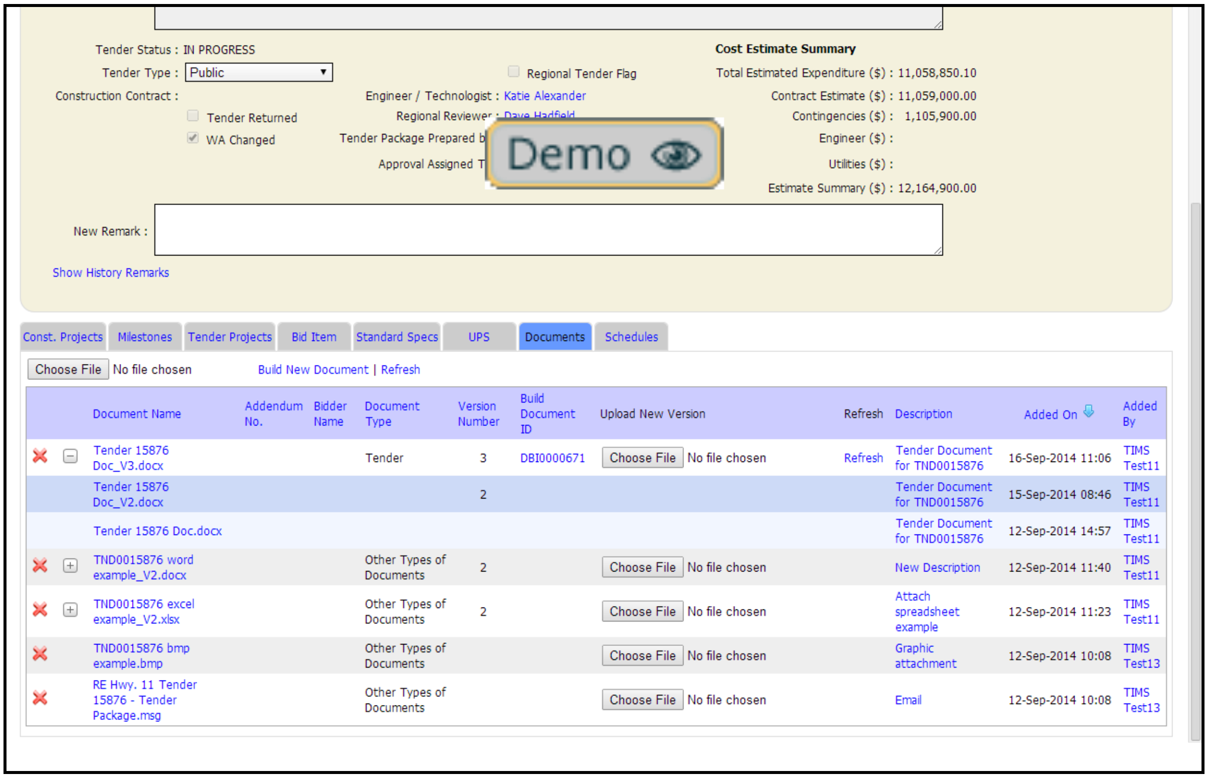


If an Email is not sent using the Create Email window, a regular email can be sent to the Regional Reviewer with the Tender ID of the submitted tender mentioned in the body of the email. The email address of the Regional Reviewer can be found by clicking on the reviewers name.

Figure 17.9 Submit Tender screen – Regional Reviewer Details



Demo 17.1 Submit a Tender to Transportation



How To

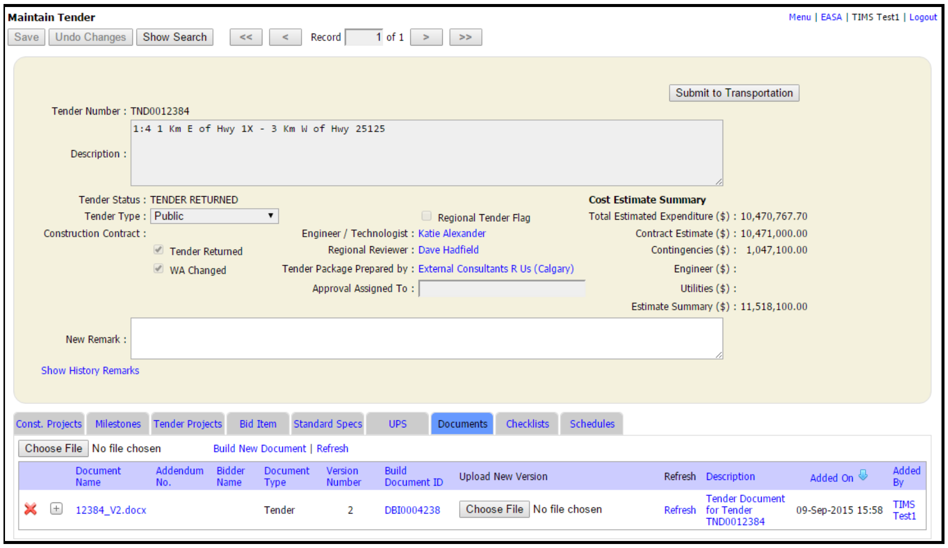
1. From the *Maintain Tender* screen, select the **Submit to Transportation** button.
2. In the **New Remark** field enter text regarding the submitted tender.
3. From the *Maintain Tender* screen select the **Save** button.
4. From the *Create Email* window, select the appropriate link for your email system.
5. From the *Email* window, complete and **Send** the Email to the Regional Reviewer.
6. From the *Create Email* window select the **Close** button.
7. The *Maintain Tender* screen can be closed.

Alert! Once the Tender Package is submitted - Do Not - change any tabs or the Tender Document until instructed to do so by the Regional Reviewer.

Submitting Final Tender Package

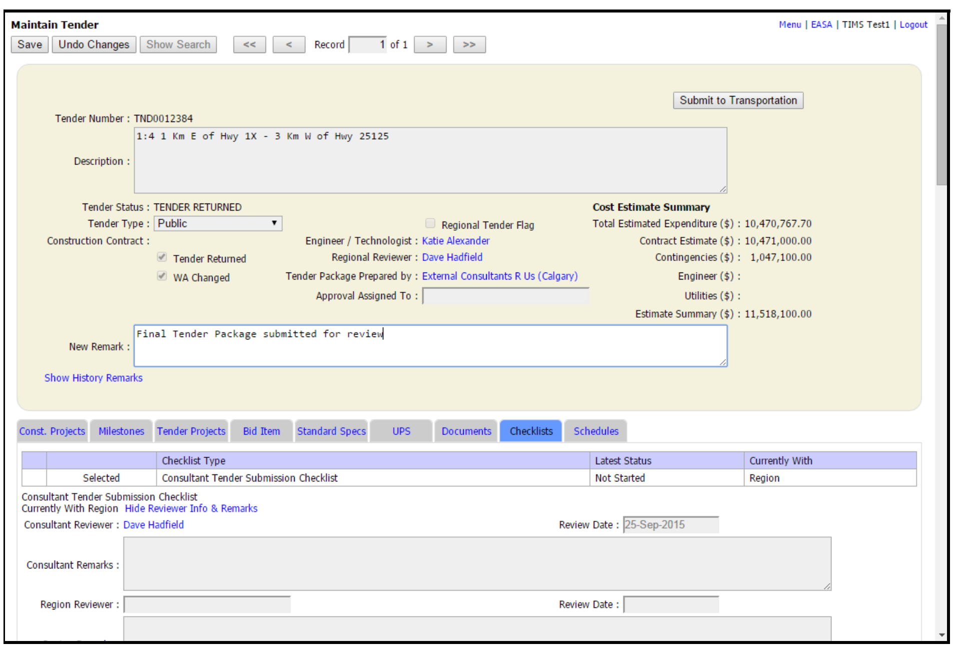
As far as submitting the Final Tender Package versus the Draft Tender Package; the process in PMA is the same. The only difference is the Status on the Maintain Tender screen shows Tender Returned for the Final Tender Package instead of In Progress for the Draft Tender.

Figure 17.10 Maintain Tender screen – Returned Tender



Follow the steps in the How To above for Final Tenders.

Figure 17.11 Maintain Tender screen - Submit Final Tender



Receive Tender Package (Regional Reviewer)

This section of the chapter documents some of the work performed by the Regional Reviewer after the Submit to Transportation steps have been performed by the consultant. It is included in the consultant guide as an FYI to better understand the hand-off and possible return of a Tender package.

When the tender package is submitted to the region (Project Sponsor/ Regional Reviewer) by the consultant, the Project Administrator will:

1. Receive the tender email
2. Review the submitted tender
   - Verify the Bid Items
   - Validate the Standard Specification Package
   - Verify the Unit Price Schedule Section(s)
   - Verify 'C' Level cost estimates for the Construction Work Activities
3. Return Tender to Consultant with comments (Draft Tender Package) or,
4. Forward the Tender Package to Professional Services - Tender Services (Final Tender Package).

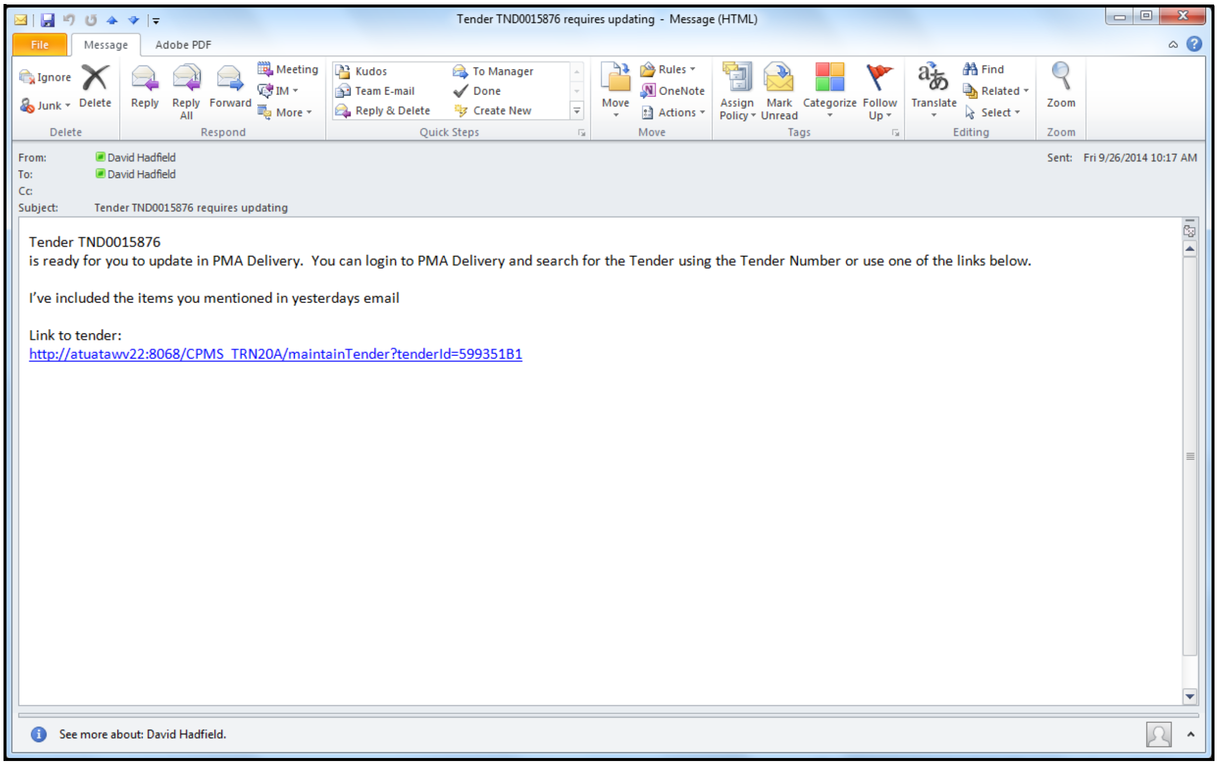
Depending on the results of the review, the tender can be returned to the consultant for changes or it can be forwarded to Professional Services - Tender Services. If the tender is returned to the consultant the tender will need to be Re-Submitted after the changes have been made.

Receive the Tender Email

When the consultant has completed the Tender package they select a button on the Maintain Tender screen called: 'Submit to Transportation'. Part of this process is the creation of an email that goes to the Regional Reviewer of the Tender. Within the Email is a link that will take the regional reviewer to PMA Delivery and the specific tender. Receipt of the email is how the regional reviewer knows there is a tender ready for review.

Alert! If an email to the Regional Reviewer is never sent - the review may never begin.

Figure 17.12 Receive Tender – Email Notification



If the regional reviewer is not already logged into PMA Delivery they will be required to enter their ID and Password before the Tender is displayed.

Figure 17.13 PMA Delivery Login screen

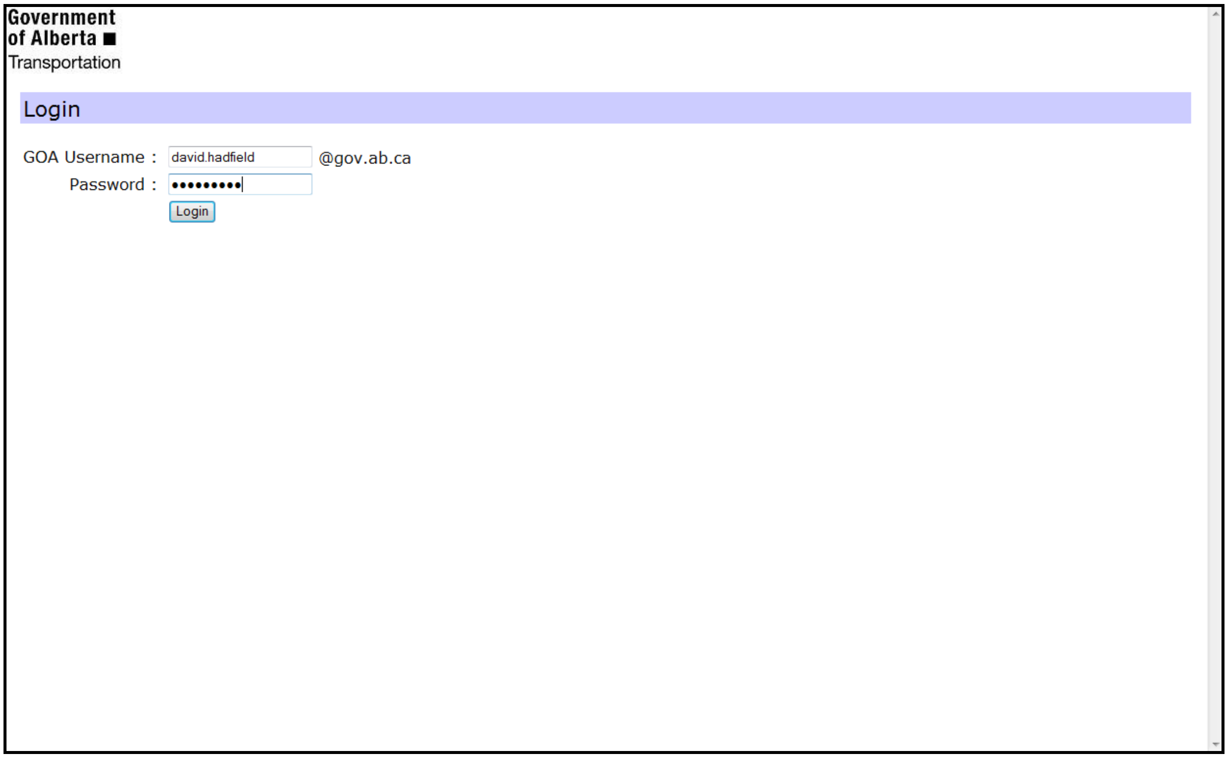
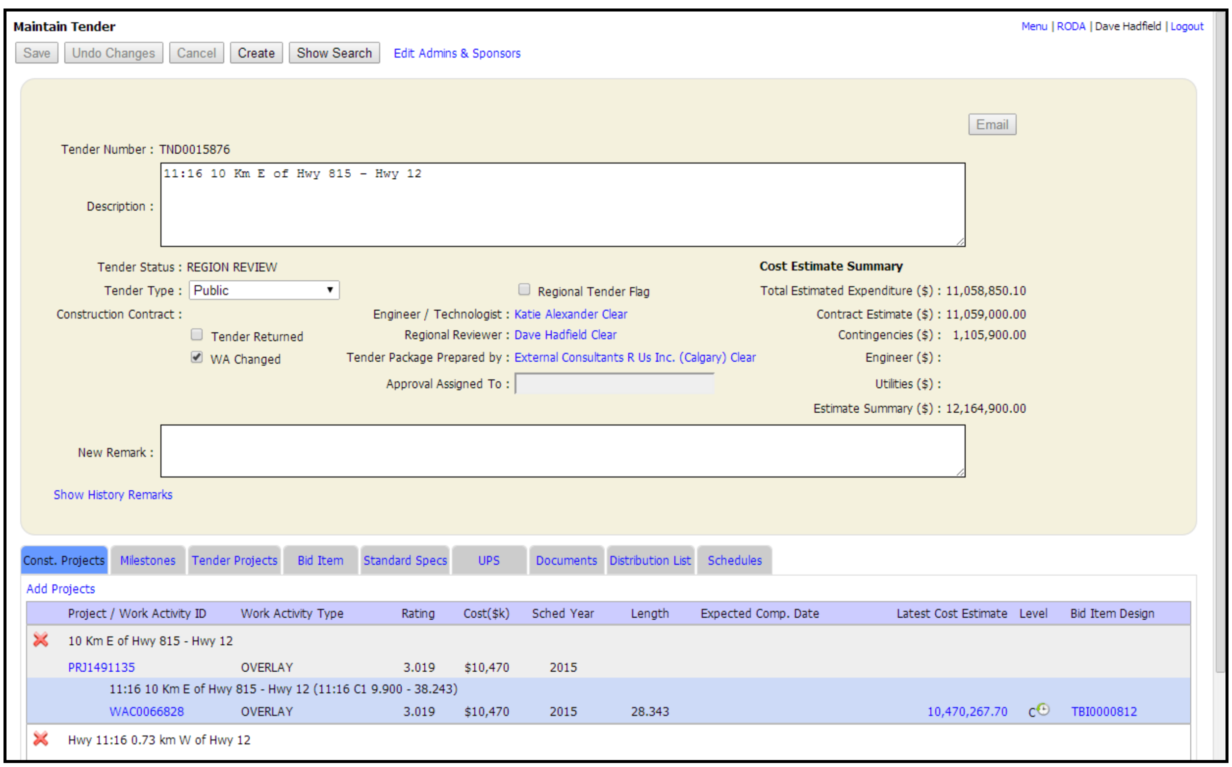


Figure 17.14 Maintain Tender screen - Region Review Status



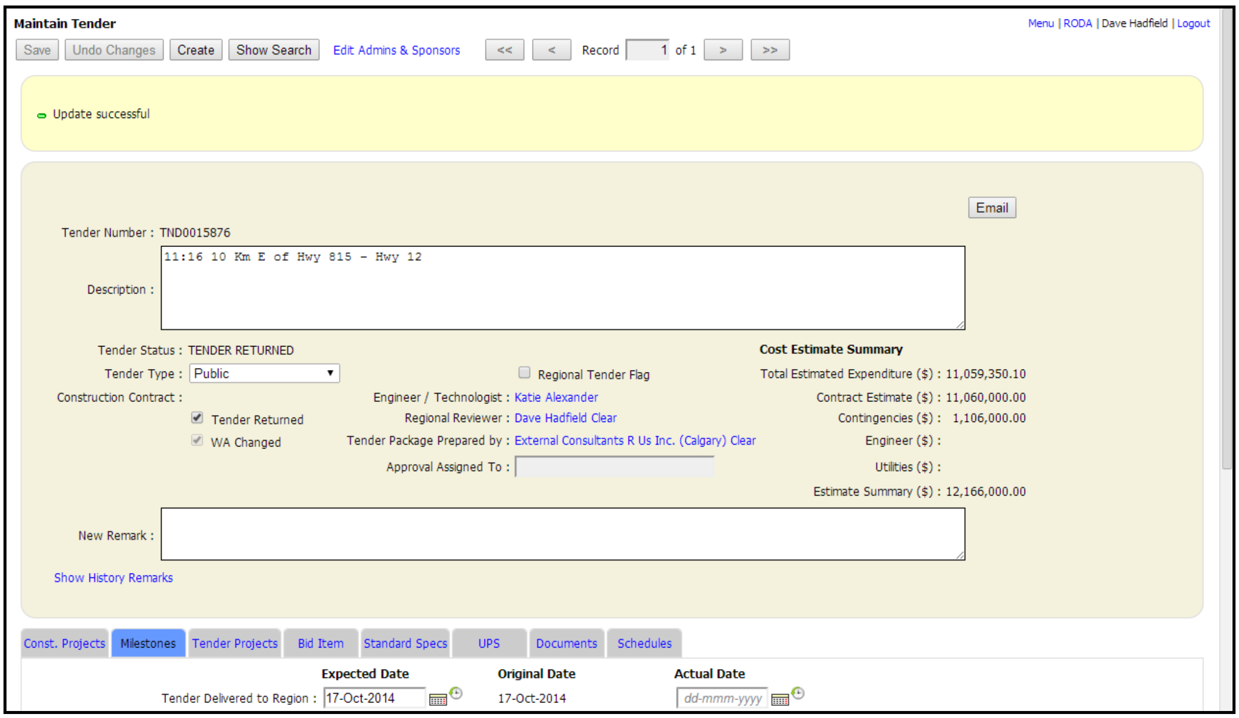
Review Submitted Tender Package (Regional Reviewer)

The review of the tender package is performed by the Regional Reviewer (Project Sponsor/Project Administrator). The outcome of the review may or may not impact the consultant.

Return Tender Package to Consultant (Regional Reviewer)

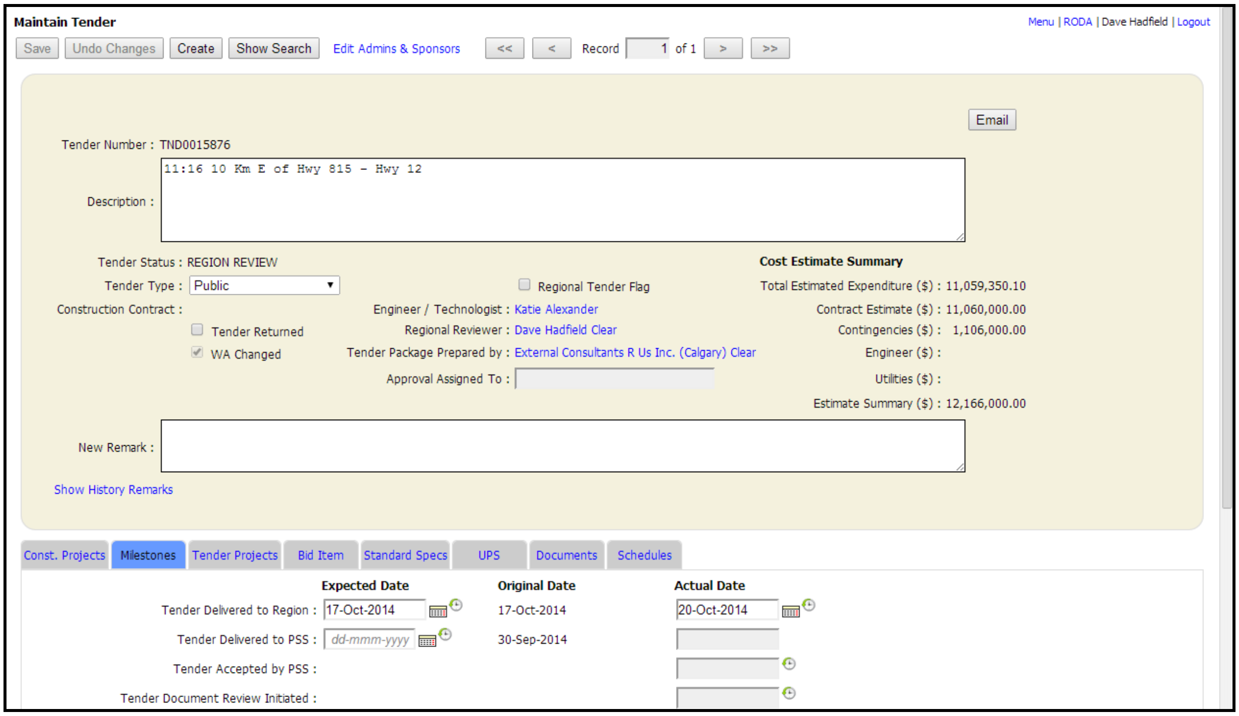
While the Tender is under review by the regional Project Administrator, it has a status of 'Region Review'. After reviewing the Draft Tender Package, the Project Administrator returns the Tender with comments. In the event the Final Tender Package is not acceptable to the Project Administrator, it is returned to the Consultant. In either instance the Tender Returned check box is selected in PMA Delivery. This sets the Tender Status to 'Tender Returned'. Only a Project Administrator can clear the check box. Once the Tender is accepted the check box should be cleared and the tender forwarded to Professional Services.

Figure 17.15 Maintain Tender screen – Tender Returned to Consultant



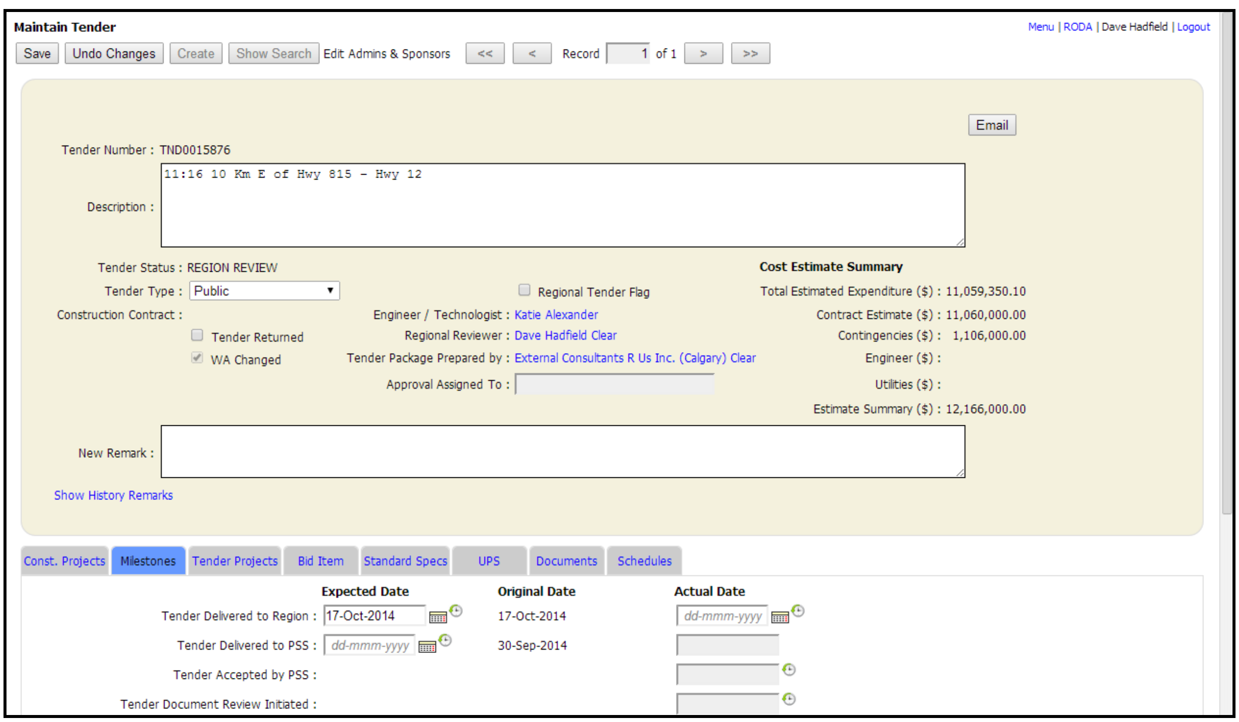
Alert! Any date change on the Milestones tab requires a Remark. This includes setting the Tender Status to: 'Tender Returned'.

Figure 17.16 Maintain Tender screen – Region Review Status



The Project Administrator removes the Tender Delivered to Region 'Actual Date'.

Figure 17.17 Maintain Tender screen – Milestones tab 'Actual Date' removed



The Project Administrator uses the Email button to generate and send an Email to the Consultant responsible for the Tender package.

Further directions and reasons for the return can be typed into the body of the Email prior to sending.

Figure 17.18 Maintain Tender screen – Create Email window

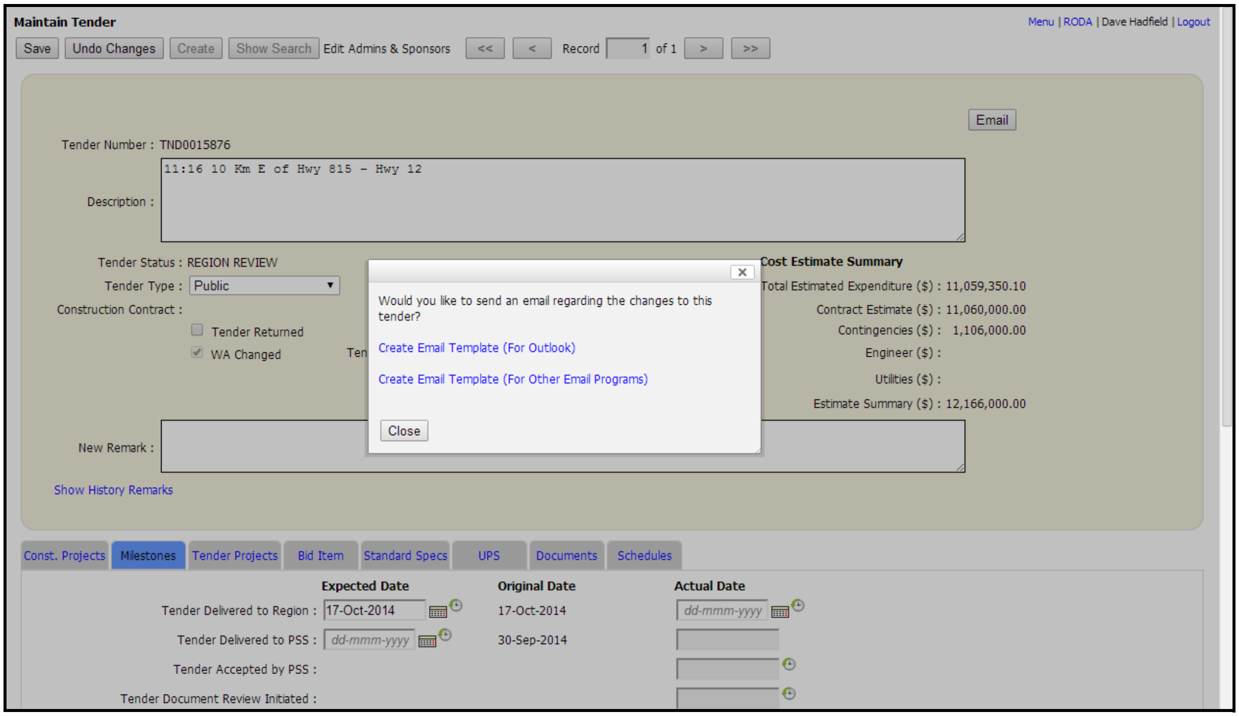
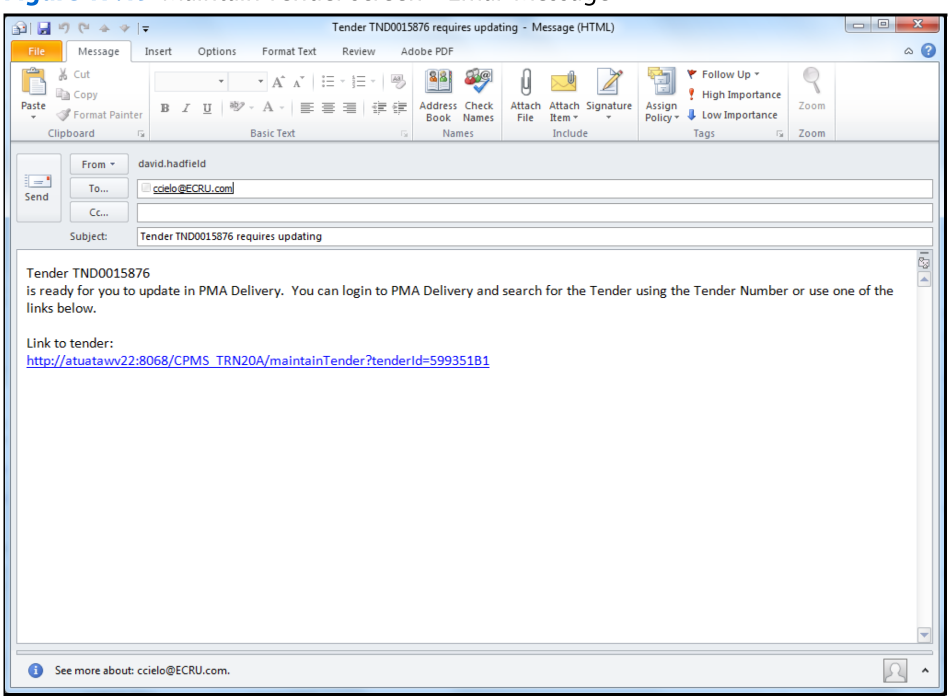


Figure 17.19 Maintain Tender screen – Email Message

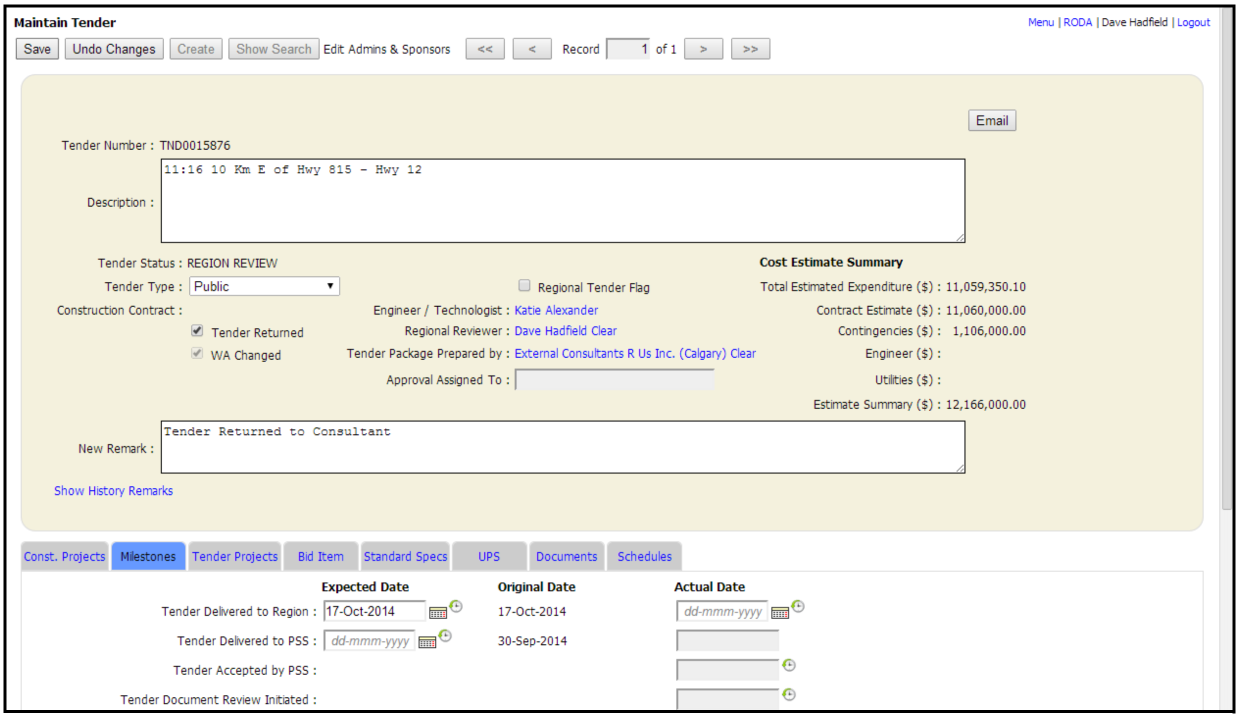


Hint: In the Email, provide an explanation of why the tender is being returned and what the expectation is for the next submission to be approved. The Comments on the Draft Tender Package can be attached if applicable.

Hint: A copy of the Sent Email will be stored in your Sent folder.

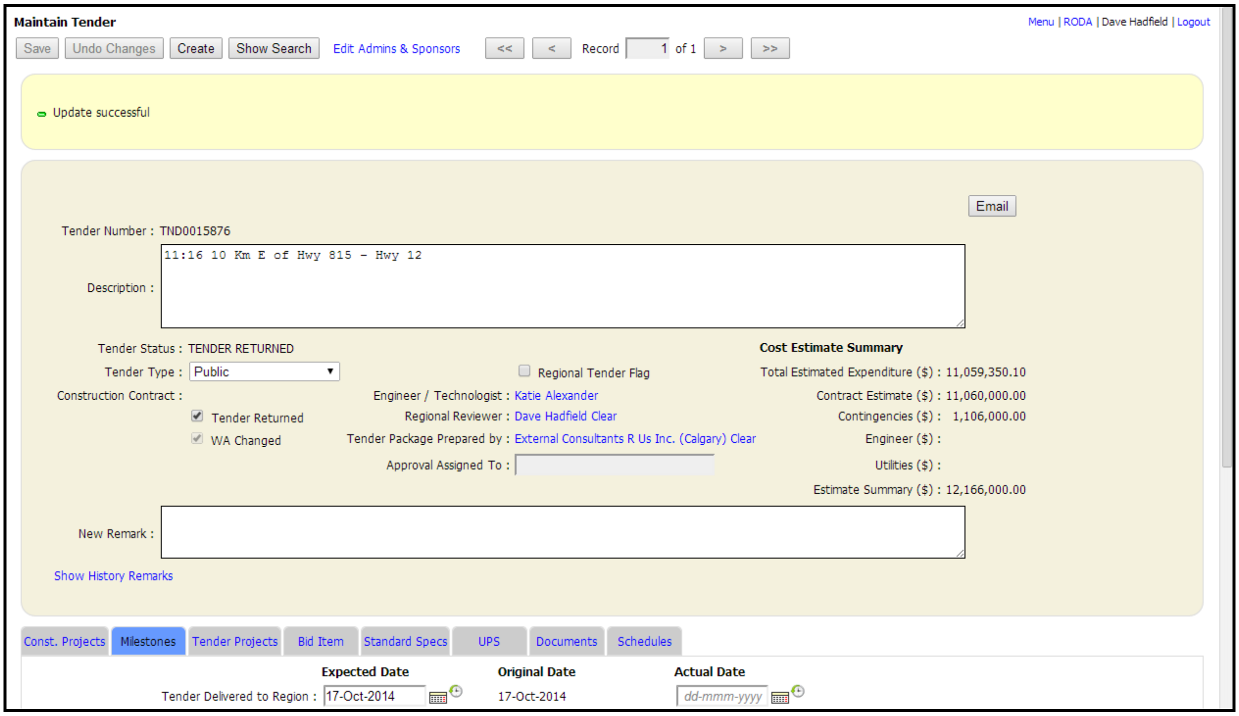
With the Email sent to the Consultant, the Project Administrator needs to change the status of the Tender to Returned. Checking the Tender Returned box requires a New Remark to save successfully.

Figure 17.20 Maintain Tender screen – Check Tender Returned

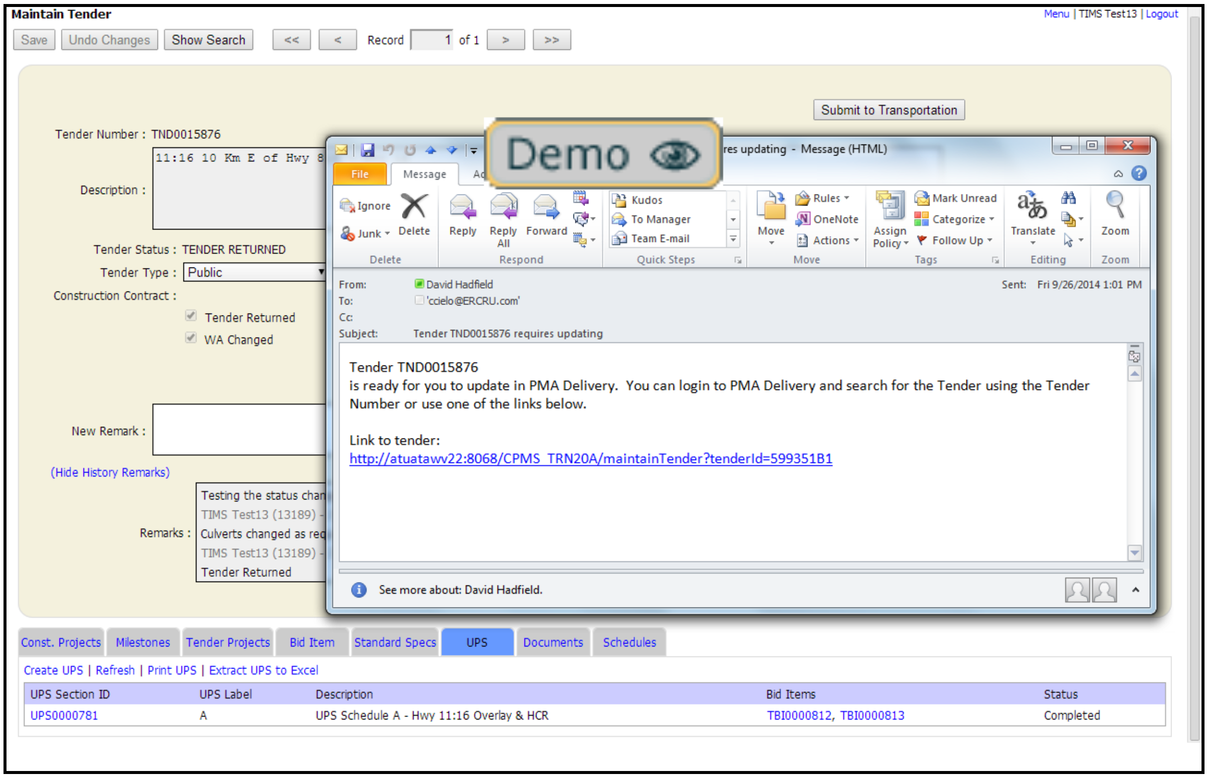


Alert! When the Tender is re-Submitted and is accepted, the Project Administrator must manually un-check the Tender Returned check box.

Figure 17.21 Maintain Tender screen – Tender Returned status



Demo 17.2 Return a Tender to Consultant



How To

1. From the *Maintain Tender* screen on the *Milestones* tab, remove the **Tender Delivered to Region 'Actual Date'** value.
2. In the **New Remark** field, enter text explaining why the tender is being returned.
3. Check the **Tender Returned** box.
4. Select the **Save** button.
5. Select the **Email** button.
6. From the *Create Email* window, select the **Create Email for Outlook** link for your email system.
7. From the *Email* window, complete and **Send** the Email to the Consultant.
8. From the *Create Email* window select the **Close** button.
9. The *Maintain Tender* screen can be closed.

Re-Submit Tender to Transportation

When a Tender is returned, the transportation regional reviewer will change the status of the tender to Tender Returned and send an email to the consultant. The consultant makes the required changes and at some time, the tender is re-submitted back to the Transportation regional reviewer. Typically this process would be: Consultant Submits Draft Tender Package, Regional Reviewer performs review and returns the Tender with Comments. The consultant addresses the comments and submits the Final Tender Package for the Regional Reviewer to perform an Administrative Review.

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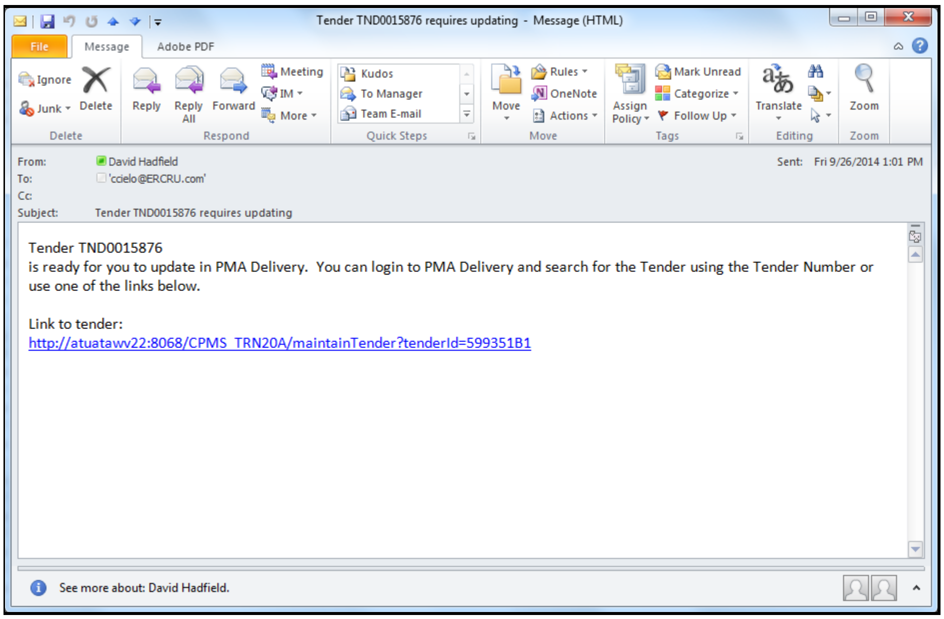
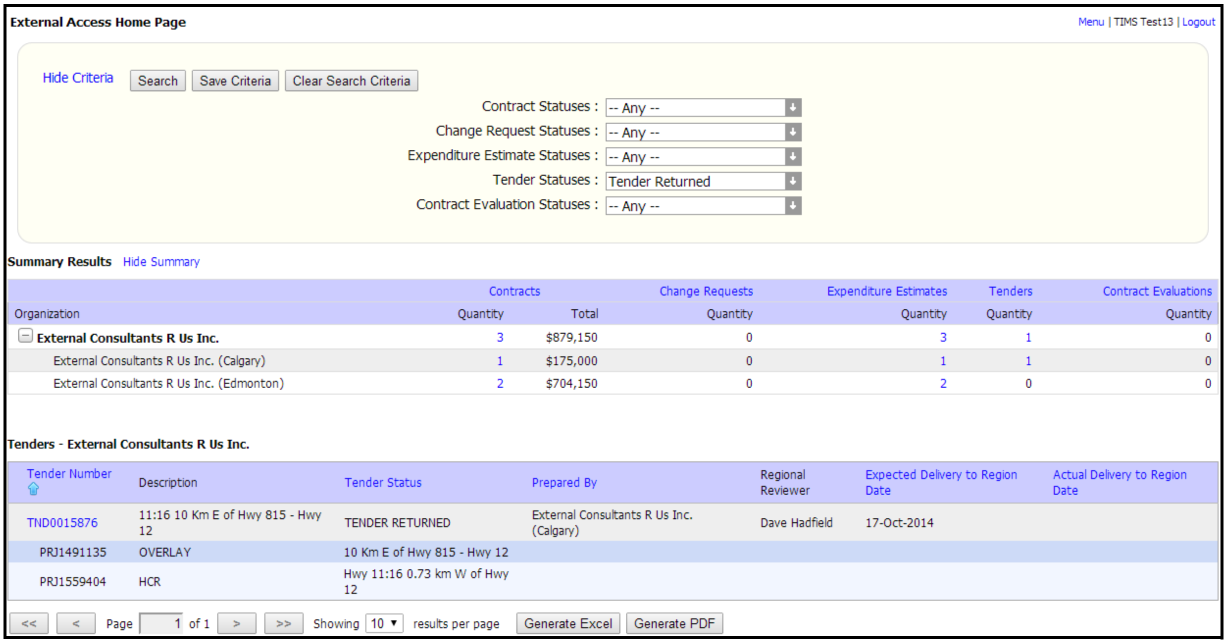
Figure 17.22 Returned Tender - Email Notice



The consultant can also perform searches specifically looking for returned tenders.

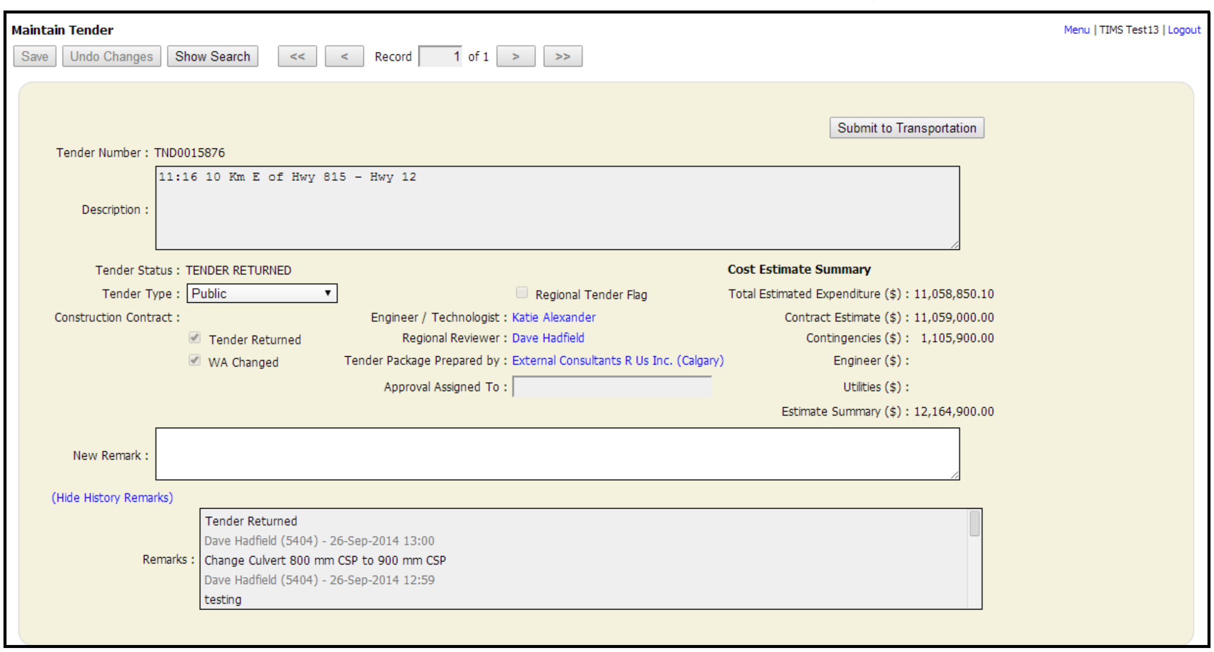
Figure 17.23 Returned Tender - Tender Returned Search Results



The email from the Regional Reviewer should contain the reason why the Tender was returned. The Remarks History may also give reasons for the tender being returned.

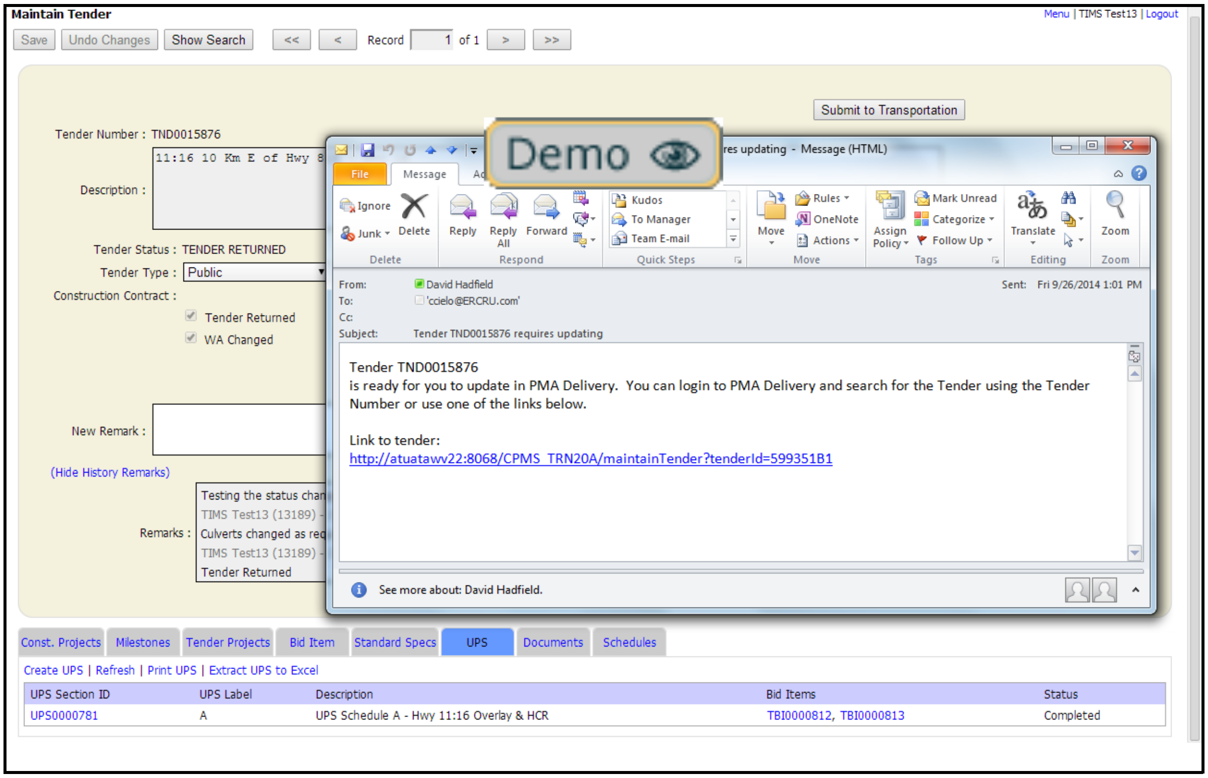
Hint: The Regional Reviewer must enter a Remark when returning a Tender.

Figure 17.24 Returned Tender - Show Remarks History



Hint: Re-Submitting a tender follows the same steps as the original submission. Although the status will not change.

Demo 17.3 Re-Submit a Tender to Transportation



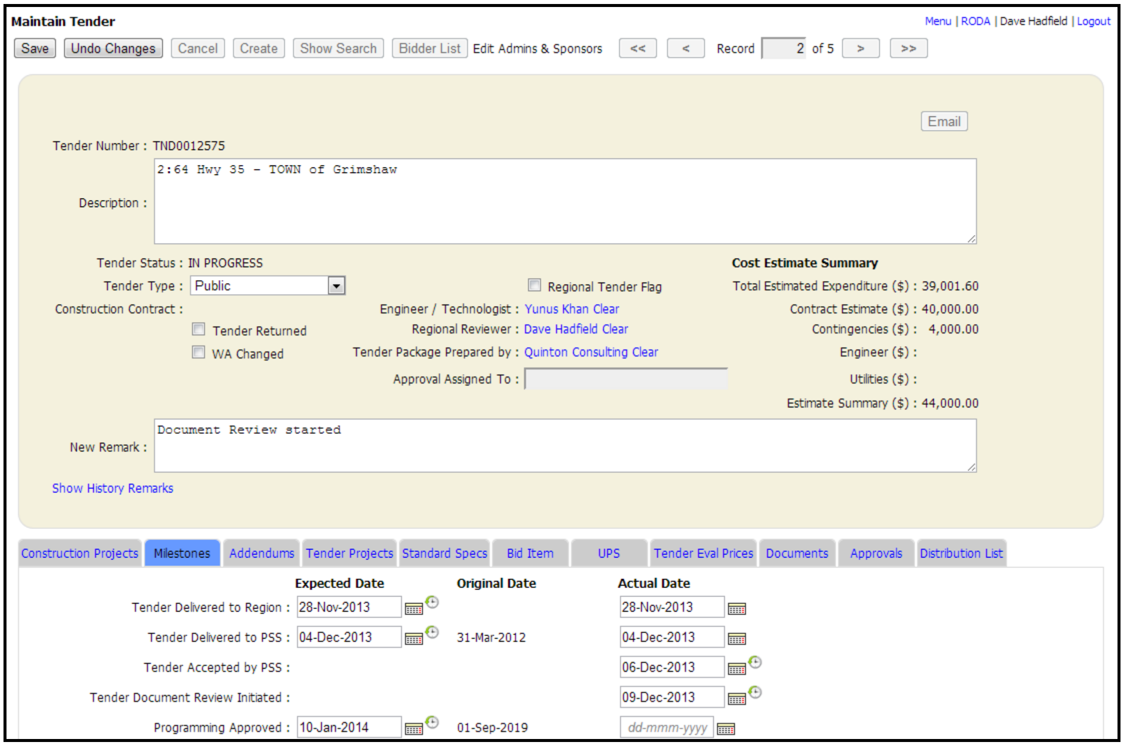
How To

1. From the *Maintain Tender* screen make any changes as directed by the regional reviewer.
2. Select the **Submit to Transportation** button.
3. In the **New Remark** field, enter text explaining why the tender is being resubmitted.
4. Select the **Save** button.
5. From the *Create Email* window, select the **Create Email for Outlook** link for your email system.
6. From the *Email* window, complete and **Send** the Email to the Regional Reviewer.
7. From the *Create Email* window select the **Close** button.
8. The *Maintain Tender* screen can be closed.

Tender Document Review Initiated 'Actual Date'

When Professional Services - Tender Services begins the Document Review process they enter the Actual Date in the Milestones tab. External consultants can view the Milestones tab to see how the tender is progressing toward being awarded.

Figure 17.25 Milestones tab - Tender Document Review Initiated "Actual Date'



Chapter 18: Contract Evaluation Search

This chapter presents searching for Contract Evaluations and the Maintain Contract screen. The Maintain Contract screen contains the Evaluation Criteria tab and the Evaluations tabs that are also introduced.

Topics in Chapter:

1. Overview of Contract Evaluation Search
2. External Access Home Page - Contract Evaluations
3. Maintain Contract Screen
4. Pre-Qualified Work Category
5. Evaluation Criteria Tab
6. Evaluations Tab

Overview of Contract Evaluation Search

When contract evaluations exist (i.e. for contracts associated with the company the consultant is employed by) they are listed in the Contract Evaluation column of the External Access Home Page. Contract Evaluations are associated with contracts. Therefore, contract evaluations can also be found by searching for a specific contract. The Maintain Contract screen will provide access to all evaluations for the contract. Evaluations can also be found by performing a search for the evaluations themselves, using criteria specific to the evaluation. The PMA Delivery Main Menu has three links that provide access to evaluations:

1. External Access Home Page screen
2. Search Contracts screen
3. Search Contract Evaluations screen

The figures below illustrate the search screens.

Figure 18.1 External Access Home Page screen - Contract Evaluations column

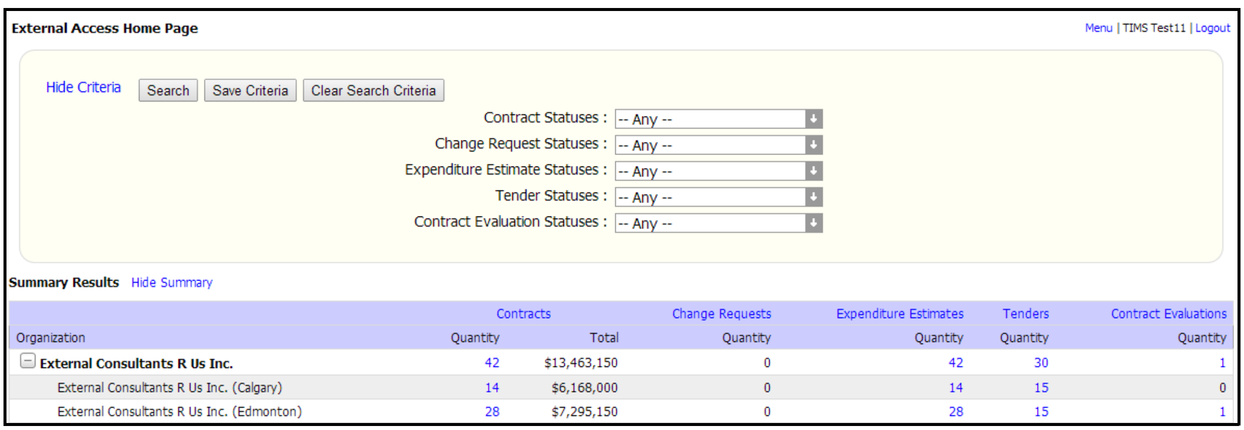


Figure 18.2 Search Contract screen

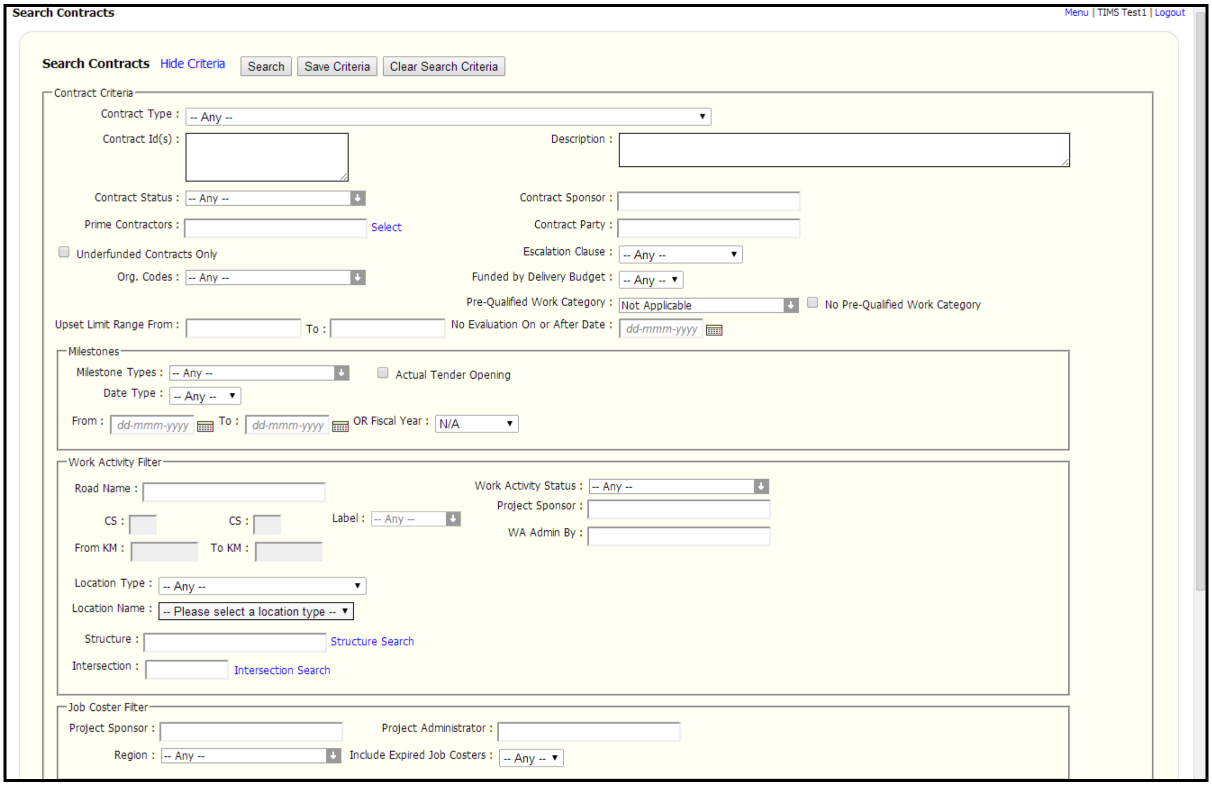
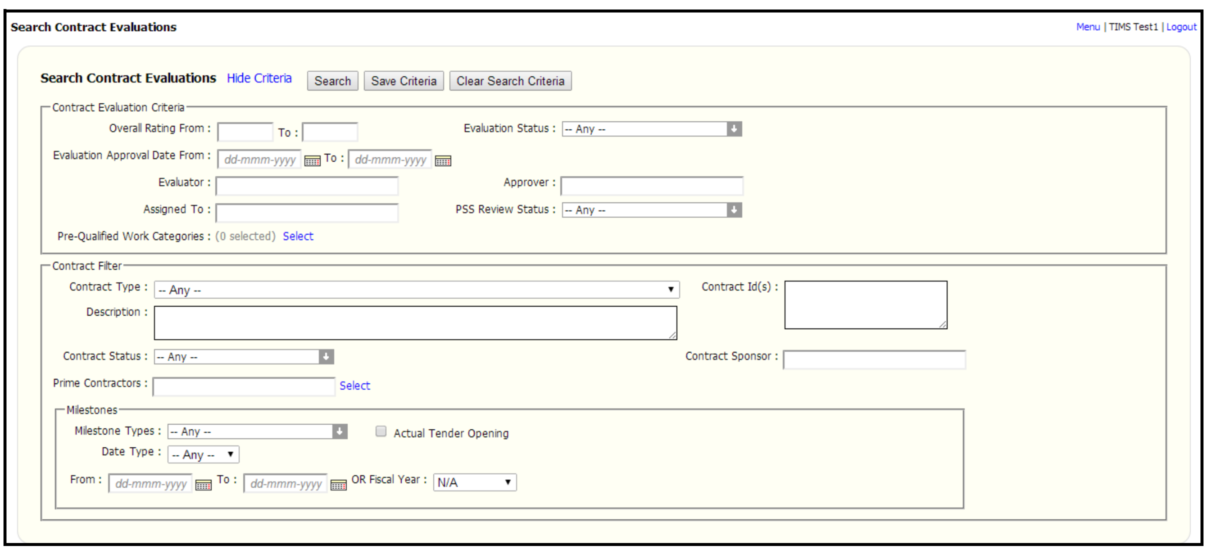


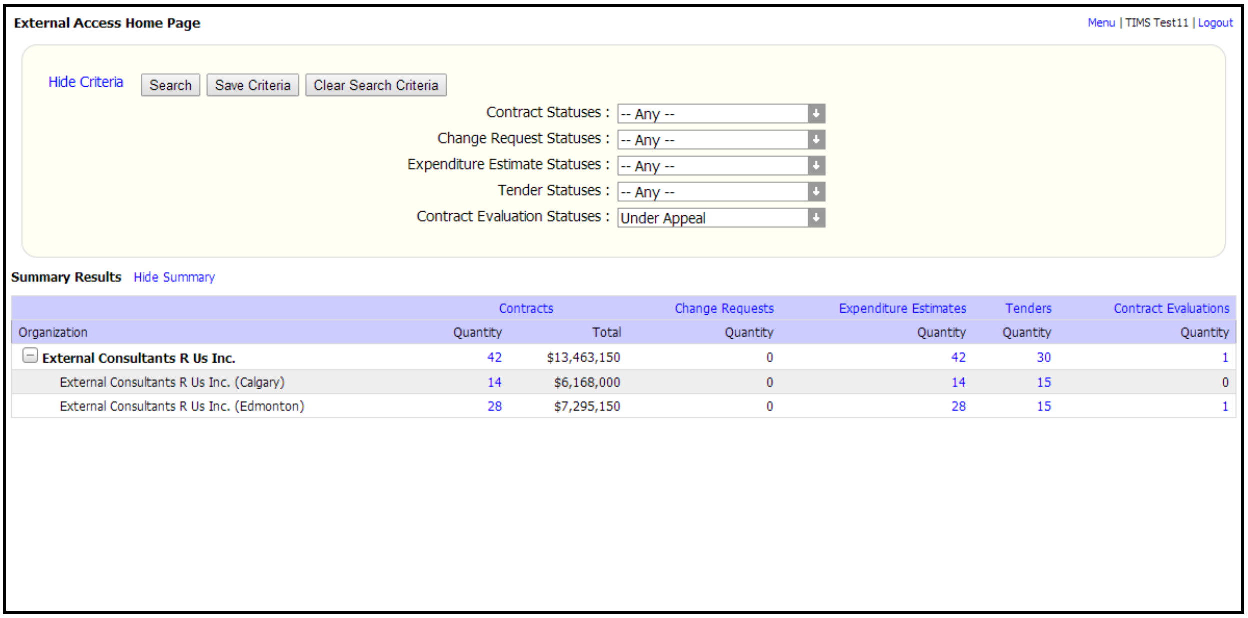
Figure 18.3 Search Contract Evaluation screen



External Access Home Page - Contract Evaluations

The External Access Home Page provides the user with access to existing contract evaluations. However, only evaluations where the ‘Prime Contractor’ matches the organization the user works for, will be listed in the results.

Figure 18.4 External Access Home Page screen - Contract Evaluation criteria



Alert!	External Users can only view Contract Evaluations where their organization is the Name value in the ‘Prime Contractor’ field on the Maintain Contract screen - Parties tab.

Figure 18.5 External Access Home Page screen - Contract Evaluation Listing

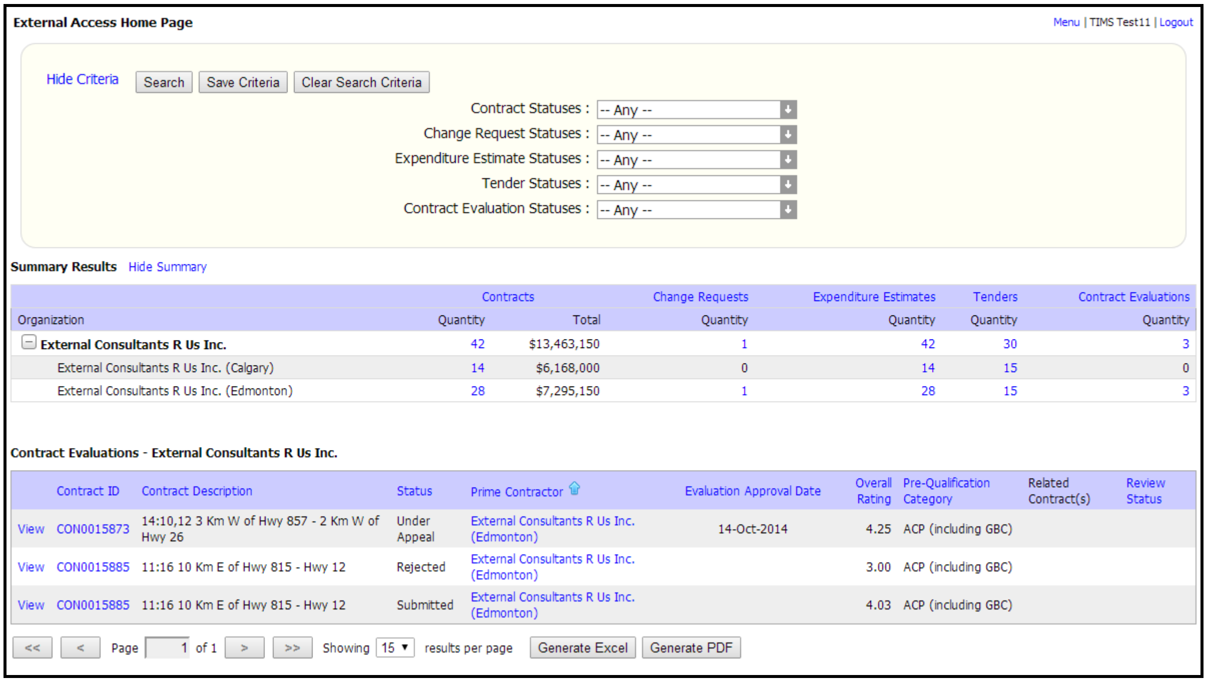
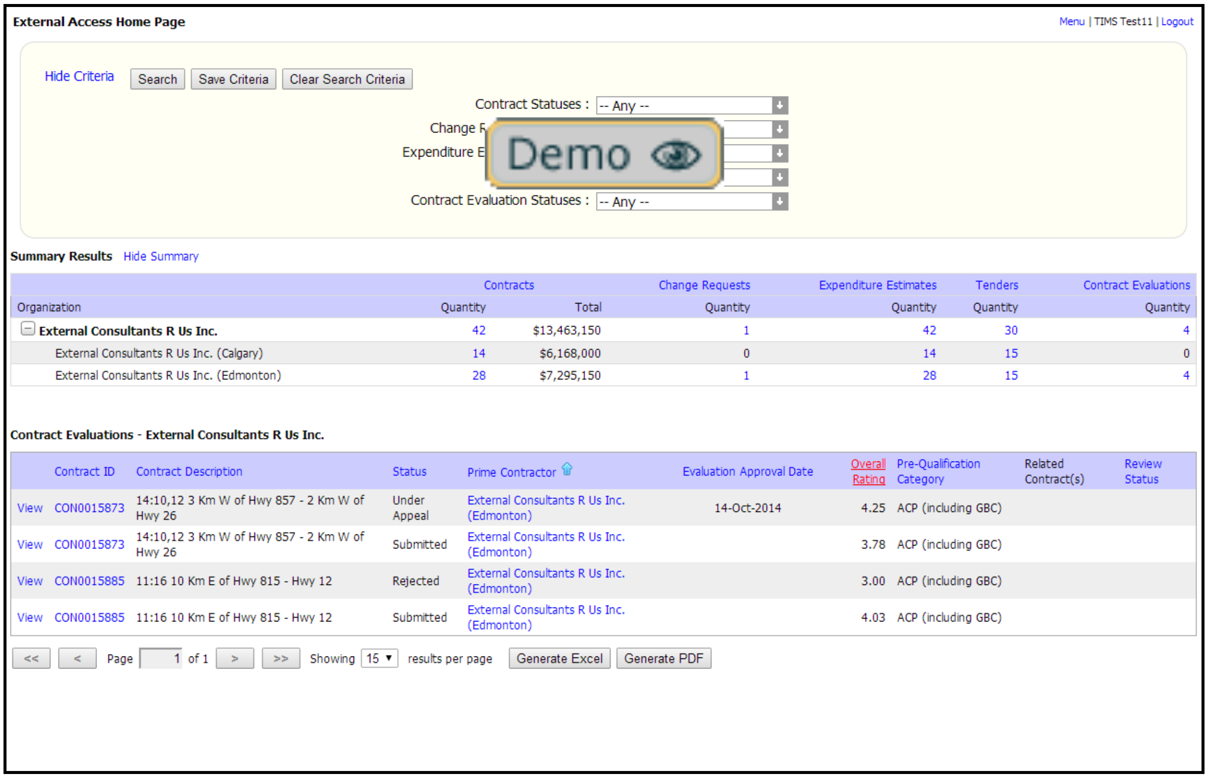


Table 18.1 External Access Home Page - Contract Evaluations - field definitions

Field	Description
View (link)	A clickable link that will open the Maintain Contract Evaluation screen with the evaluation loaded.
Contract ID	Displays the Contract Number as a clickable link that will open the Maintain Contract screen with the contract loaded.
Description	A textual description of the Contract. Defaults to the description of the Work Activity that is the Project Driver.
Contract Evaluation Status	The current status of the Evaluation (i.e. In Progress, Submitted, Under Appeal, etc.).
Prime Contractor	The name of the Company awarded the contract.
Evaluation Approval Date	The date when the evaluation was approved.
Overall Rating	Displays the calculated rating (0.0 - 5.0) for all criteria entered.
Pre-Qualification Category	The pre-Qualification Category selected when the Contract Evaluation Criteria was originally set up.
Related Contracts	The tender has been created and is under development but no 'Actual Dates' have been entered.
Review Status	Displays the PSS Review Status (i.e. Submitted, Approved, Returned, Include in Past Performance).

Demo 18.1 Search for Contract Evaluations - External Access Home Page screen



How To

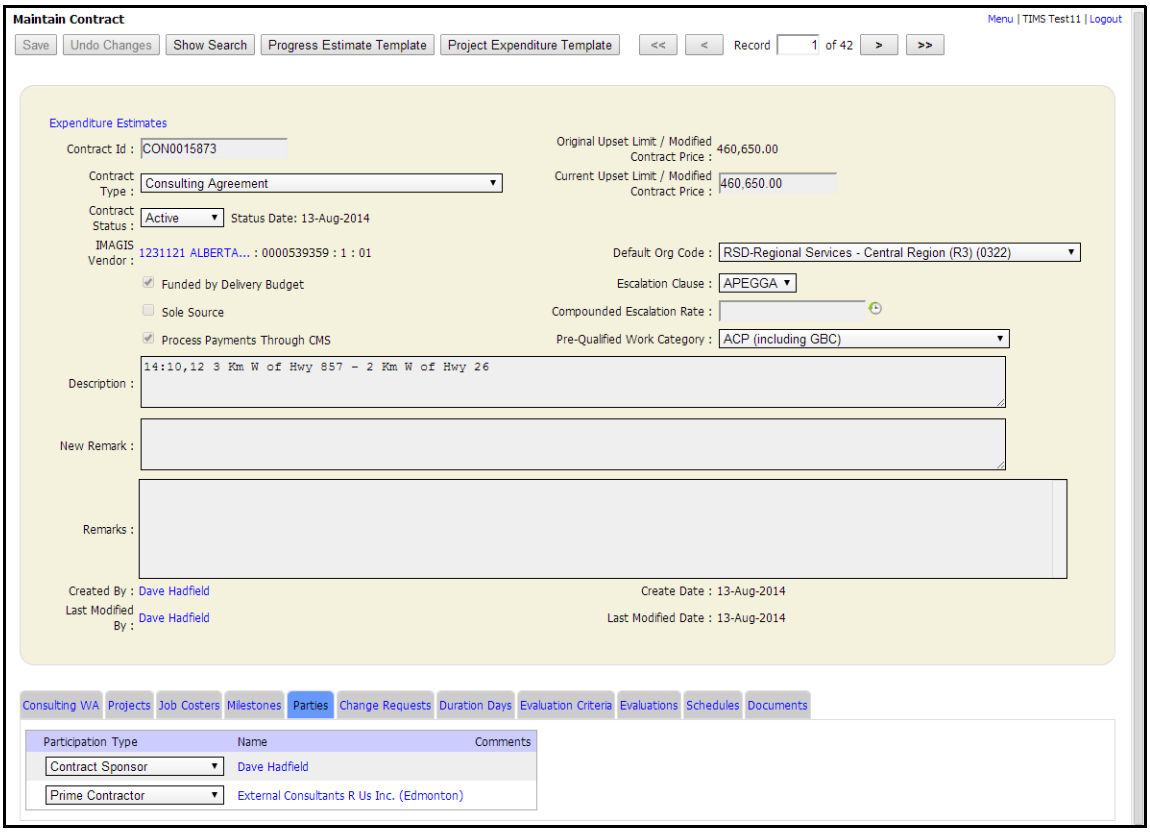
1. From the *PMA Delivery Main Menu* click on **External Access Home Page**.
2. Enter criteria relevant to the evaluation(s) required.
3. Click the **Search** button.
4. From the *Contract Evaluations* column click the **Value** link for the required evaluation.
5. From the *Contract Evaluations* listing, click the **View** link for the required Contract ID
6. From the *Maintain Contract Evaluation* screen review the evaluation.

Maintain Contract Screen

The Maintain Contract screen contains three areas of interest to Evaluations:

- the Pre-Qualified Work Category drop down field for identifying major work types.
- the Evaluation Criteria tab used to establish the criteria that is applied during the evaluation process(es).
- the Evaluations tab used during each evaluation.

Figure 18.6 Maintain Contract screen

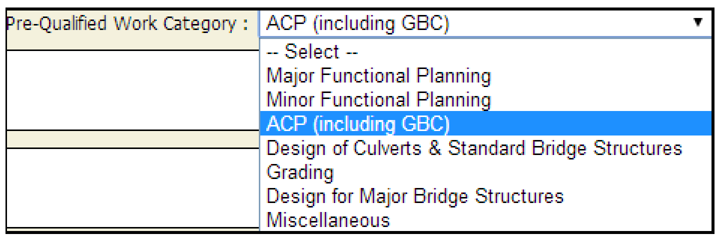


Pre-Qualified Work Category

For Consulting Agreement contract types, the Maintain Contract screen has a drop down field called: 'Pre-Qualified Work Category'. Existing contracts will not have a value in this field. For new Consulting Agreement contracts, this field will default to Miscellaneous. The value in the field can be changed by the Transportation Project Administrator at anytime, to any value, up until the status of the contract is set to 'Completed'. Completed Consulting Agreements, that do not have the appropriate Pre-Qualified Work Category value, will skew the Selection Summary Report run by Professional Services - Consulting.

Consultants may identify to the Project Administrator that a Pre-Qualified Work Category may be incorrect for the contract.

Figure 18.7 Maintain Contract screen - Pre-Qualified Work Categories



Evaluation Criteria Tab

Each Consulting Agreement needs evaluation criteria created. PMA Delivery allows Project Administrators to set up the Evaluation Criteria that will be used on the Consulting Agreement. A contract may have multiple evaluation criterion. The Evaluation Criteria tab provides access for the Project Administrator to create the criteria, and for consultants to view the criteria.

Figure 18.8 Maintain Contract screen – Evaluation Criteria Tab

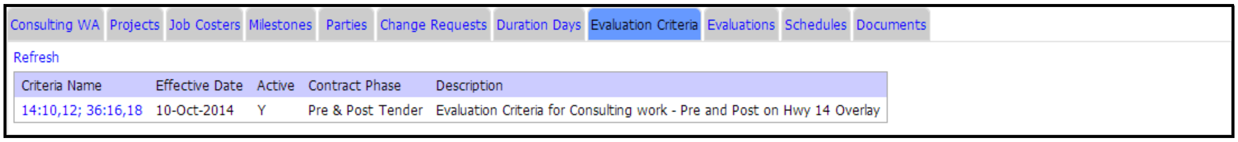


Table 18.2 Maintain Contract Evaluation Criteria Tab - field definitions

Field	Description
Refresh (link)	This is used to update the Maintain Contract screen with work performed on anther screen. For example, the Maintain Contract Evaluation Criteria screen is a separate screen.
Criteria Name (link)	A link to the Maintain Contract Evaluation Criteria screen for the criteria selected. Displays the name given to the evaluation criteria. Typically the LRS of the driver work activity.
Effective Date	The date the Evaluation Criteria goes into effect. The effective date can be future dated allowing the user to create the criteria in advance.
Active	Displays if the criteria is active (Y/N) or not.
Contract Phase	Displays the Consulting contract phase (Pre-Tender, Post-Tender, Both) that the criteria is applicable to.
Description	Displays the description as entered on the Maintain Contract Evaluation Criteria screen.

Evaluations Tab

When the time comes to perform the evaluation of the consultant, the Project Administrator uses the Evaluation tab to create (record) the results of the evaluation. During the life of a consulting contract there can be several evaluations performed and PMA Delivery allows the recording of each.

Alert! Only the Project Administrator(s) who is associated with the Work Activities and Job Costers of the contract, can create contract evaluations for the contract.

Figure 18.9 Maintain Contract screen – Evaluations Tab

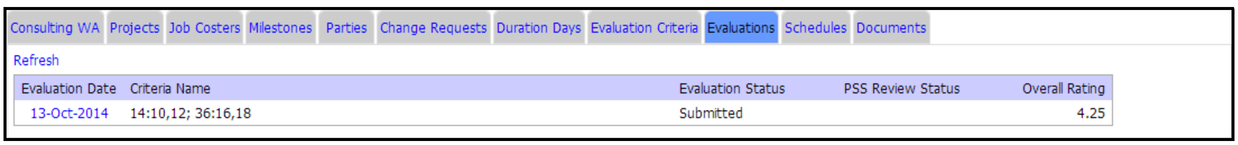


Table 18.3 Maintain Contract Evaluations Tab - field definitions

Field	Description
Refresh (link)	This is used to update the Maintain Contract screen with work performed on another screen. For example, the Maintain Contract Evaluation screen is a separate screen.
Evaluation Date (link)	A link to the Maintain Contract Evaluation screen for the date selected. The date the Evaluation was first successfully saved.
Criteria Name	Displays the name given to the evaluation. Typically the LRS of the driver work activity.
Evaluation Status	Displays the current status of the evaluation (In Progress, Submitted, Rejected, Completed, Under Appeal, Appeal Approved, Appeal Rejected).
PSS Review Status	Displays the current Professional Services Review status of the evaluation (Submitted, Returned, Approved, Include in Past Performance).
Overall Rating	Displays the calculated rating (0 - 5.0).

Chapter 19: Maintain Contract Evaluation Criteria

This chapter presents the Maintain Contract Evaluation Criteria screen and each of its tabs.

Topics in Chapter:

Maintain Contract Evaluation Criteria Screen

The Maintain Contract Evaluation Criteria screen allows consultants to 'view' the criteria that evaluations will be based on. The criteria is established by the Professional Services - Consulting group. When the Project Administrator creates an evaluation, the criteria automatically populates many of the fields in the new evaluation. The screen provides the ability to create criteria for contracts by the type of contract (consulting, construction, service agreement, etc.) and by the phase (pre-tender, post-tender, etc.) of the contract (if applicable).

Alert!	External Access users have 'View' rights to the Maintain Contract Evaluation Criteria screen.

Hint:	Initial Preparation is performed once to establish the Criteria and then rarely changed there after.

Figure 19.1 Maintain Contract Evaluation Criteria screen

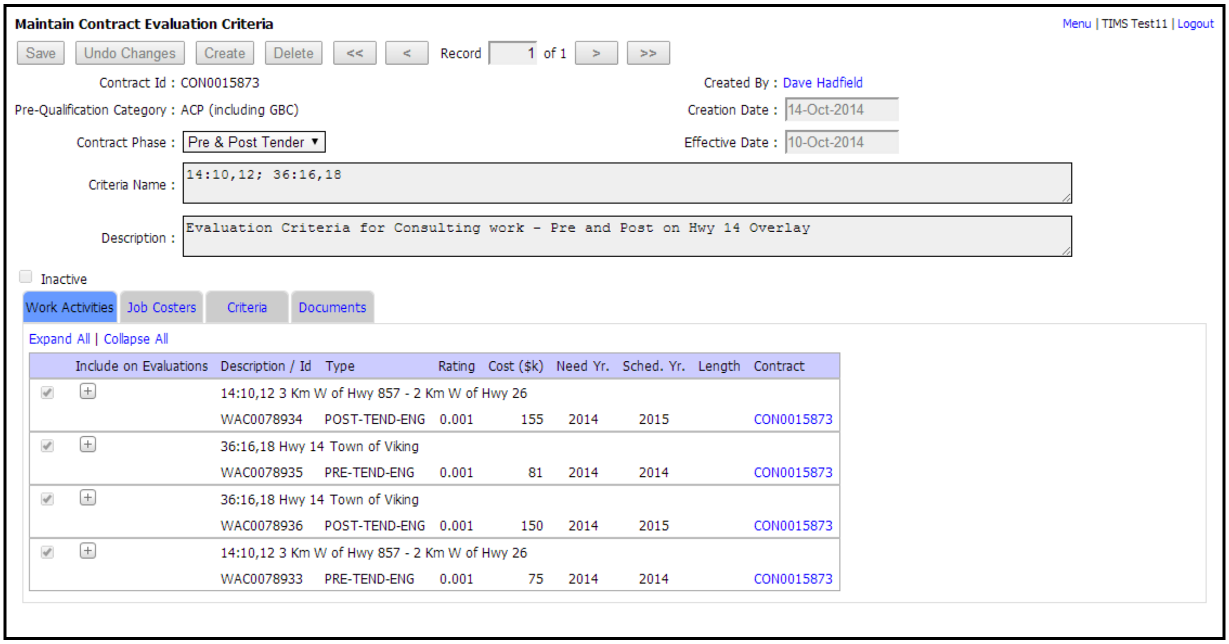


Table 19.1 Maintain Contract Evaluation Criteria General - field definitions

Field	Description
Contract ID	The Contract Number the criteria is associated with.
Pre Qualified Work Category	Work Categories are a grouping of work activities. For example, the Work Category of Chip Seal includes the Work Activity Types of Base & Double Seal Coat, Chip Seal, Cold Mill & Fill, Crack Sealing etc.
Creation Date	The date the Evaluation Criteria goes into effect. The effective date can be future dated allowing the user to create the criteria in advance.
Contract Phase	The Phase (i.e pre-tender, post-tender, both) of the contract that the criteria is applied against.
Effective Date	The date the Evaluation Criteria goes into effect. The effective date can be future dated allowing the user to create the criteria in advance.
Criteria Name	Displays the name given to the evaluation criteria. Typically the LRS of the driver work activity.
Description	Displays the description as entered when the criteria was created.
Inactive	Check box indicating the criteria is active (unchecked) or not active (checked).

Work Activities Tab

The Work Activities tab displays the Work Activities of the contract that have been included for evaluation, in the Evaluation Criteria. The Contract and Tender IDs are active and will open the Maintain Contract or Maintain Tender screens if selected.

Figure 19.2 Maintain Contract Evaluation Criteria screen - Work Activities

Work Activities | Job Costers | Criteria | Documents

Expand All | Collapse All

Include on Evaluations	Description / Id	Type	Rating	Cost ($k)	Need Yr.	Sched. Yr.	Length	Contract
☑ +	14:10,12 3 Km W of Hwy 857 - 2 Km W of Hwy 26							
	WAC0078934	POST-TEND-ENG	0.001	155	2014	2015		CON0015873
☑ +	36:16,18 Hwy 14 Town of Viking							
	WAC0078935	PRE-TEND-ENG	0.001	81	2014	2014		CON0015873
☑ +	36:16,18 Hwy 14 Town of Viking							
	WAC0078936	POST-TEND-ENG	0.001	150	2014	2015		CON0015873
☑ +	14:10,12 3 Km W of Hwy 857 - 2 Km W of Hwy 26							
	WAC0078933	PRE-TEND-ENG	0.001	75	2014	2014		CON0015873

Hint: The individual expand and collapse buttons are active.

Figure 19.3 Maintain Contract Evaluation Criteria screen - Work Activities expanded

Work Activities | Job Costers | Criteria | Documents

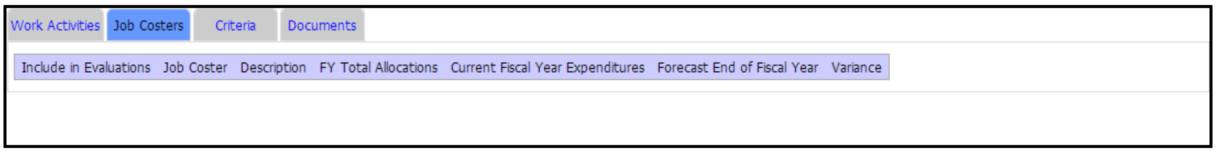
Expand All | Collapse All

Include on Evaluations	Description / Id	Type	Rating	Cost ($k)	Need Yr.	Sched. Yr.	Length	Contract
☑ −	14:10,12 3 Km W of Hwy 857 - 2 Km W of Hwy 26							
	WAC0078934	POST-TEND-ENG	0.001	155	2014	2015		CON0015873
	14:10,12 3 Km W of Hwy 857 - 2 Km W of Hwy 26 (14:10 C1 11.843 - 34.511; 14:12 C1 0.000 - 6.331; 14:12 C1 12.665 - 14.301)							
	WAC0078931	OVERLAY	0.668	9,019	2014	2015	30.635	TND0015874
☑ −	36:16,18 Hwy 14 Town of Viking							
	WAC0078935	PRE-TEND-ENG	0.001	81	2014	2014		CON0015873
	36:16,18 Hwy 14 Town of Viking (36:16 C1 34.346 - 37.401; 36:18 C1 0.000 - .205)							
	WAC0078932	OVERLAY	0.353	1,242	2014	2015	3.260	TND0015874
☑ +	36:16,18 Hwy 14 Town of Viking							
	WAC0078936	POST-TEND-ENG	0.001	150	2014	2015		CON0015873
☑ +	14:10,12 3 Km W of Hwy 857 - 2 Km W of Hwy 26							
	WAC0078933	PRE-TEND-ENG	0.001	75	2014	2014		CON0015873

Job Costers Tab

If the Consulting Contract receives any funding via Job Costers, the Job Costers tab will display those Job Costers.

Figure 19.4 Maintain Contract Evaluation Criteria screen - Job Costers tab



Criteria Tab

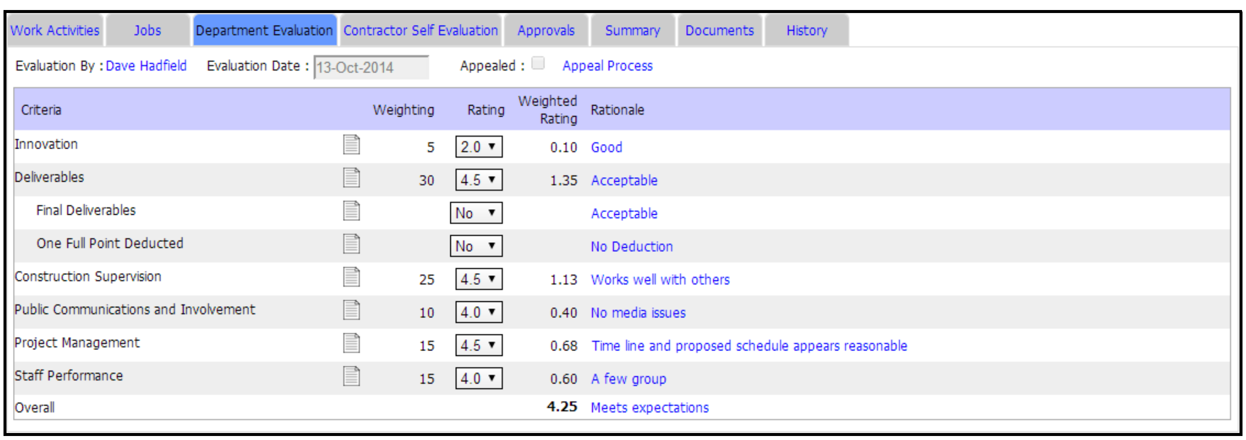
The Criteria tab displays the Criteria Types being used in the Criteria and the weighting assigned to each of the Types. The weighting value is used in the evaluation to determine the Overall Rating. For example, a rating of 4.5 for a Criteria Type with a Weighting of 5 will have less impact on the overall rating than a rating of 4 on a Criteria Type with a Weighting of 30.

Figure 19.5 Maintain Contract Evaluation Criteria screen - Criteria tab

Evaluation Criterion Type	Weighting	Description
Innovation	5	Provision of innovative planning, design and construction alternatives that add optimal value to the...
Deliverables	30	Provision of project products such as technical reports, designs, tender documents, and plans to spe...
Final Deliverables		Finals (Final Progress Estimate and Final Details Package) submitted to the department within specif...
One Full Point Deducted		One full point deducted for late submission of finals.
Construction Supervision	25	Ability of the consultant to administer the contract, monitor, inspect and test work performed by co...
Public Communications and Involvement	10	Dealing with people, outside the department, with a stake in the project. Including design and deli...
Project Management	15	Effective delivery and management of the project, interact and communicate with Department Project T...
Staff Performance	15	Demonstrate competence, experience and expertise.
Overall Total	100	

Figure 19.6 below provides an example of an evaluation based on the criteria above. The criteria types of Innovation, Deliverables, etc. and their weightings are established above, and automatically appear when the evaluation is created.

Figure 19.6 Maintain Contract Evaluation screen - resulting from criteria



Criteria	Weighting	Rating	Weighted Rating	Rationale
Innovation	5	2.0	0.10	Good
Deliverables	30	4.5	1.35	Acceptable
Final Deliverables		No		Acceptable
One Full Point Deducted		No		No Deduction
Construction Supervision	25	4.5	1.13	Works well with others
Public Communications and Involvement	10	4.0	0.40	No media issues
Project Management	15	4.5	0.68	Time line and proposed schedule appears reasonable
Staff Performance	15	4.0	0.60	A few group
Overall			**4.25**	Meets expectations

Documents Tab

The Documents tab is a place where files (i.e. bmp, email, cad, doc, xls, etc.) relating to the criteria may be attached. The file types that can be attached are only limited to the software on the computer of the person attaching the files. For example, a person with Word and not WordPerfect would have a problem with any WordPerfect file.

Figure 19.7 Maintain Contract Evaluation Criteria screen - Documents tab

Chapter 20: Maintain Contract Evaluation Screen

This chapter presents the Maintain Contract Evaluation screen and each of its tabs. Each section of this chapter covers the layout of the screen and individual tabs. The following chapter covers the actual contract evaluation process.

Topics in Chapter:

1. Maintain Contract Evaluation Screen
2. Work Activities Tab
3. Jobs Tab
4. Department Evaluation Tab
5. Appeal Evaluation
6. Contractor Self Evaluation Tab
7. Approvals Tab
8. Summary Tab
9. Documents Tab
10. History Tab

Maintain Contract Evaluation Screen

The Maintain Contract Evaluation screen contains several pieces of data that are copied directly from the Maintain Contract screen. The screen has a general section at the top of the screen that remains visible no matter which tab you may be viewing.

Alert! External Access users have 'View' rights to the Maintain Contract Evaluation screen.

Any links (blue text) are clickable and will display the corresponding screen or window.

Figure 20.1 Maintain Contract Evaluation screen

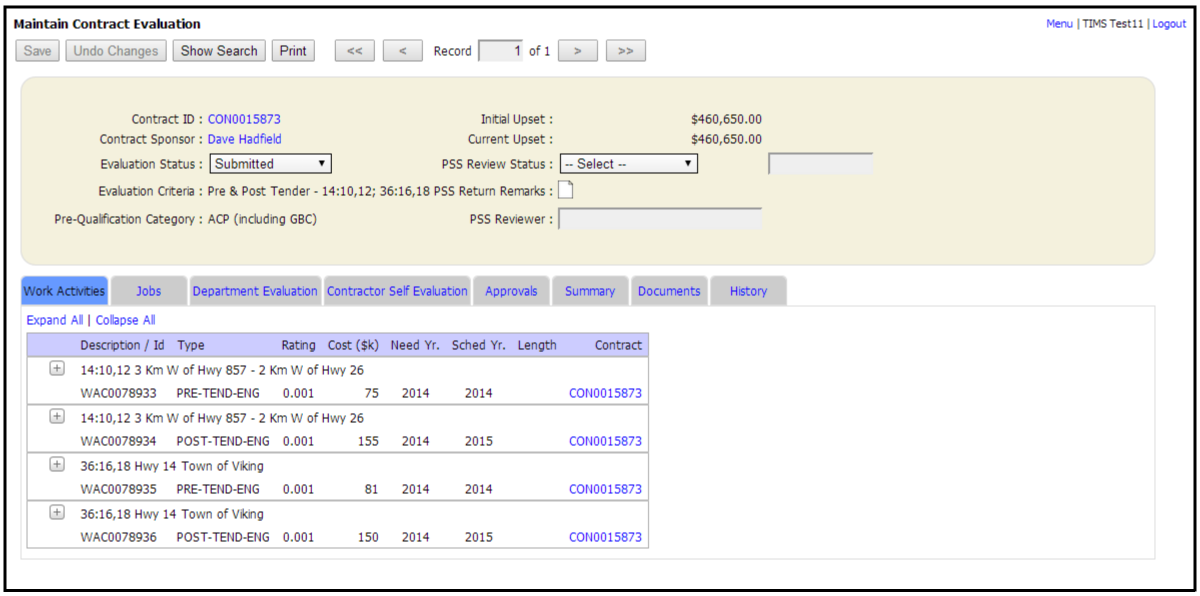


Table 20.1 Maintain Contract Evaluation General - field definitions

Field	Description
Show Search (button)	Takes the user to the Search Contract Evaluations screen.
Print (button)	Allows the user to generate the current version of the Final Evaluation in PDF format.
Contract ID	Displays the Contract ID (copied from contract).
Contract Sponsor	Displays the Contract Sponsor (copied from contract).

Table 20.1 Maintain Contract Evaluation General - field definitions

Field	Description
Evaluation Status	Displays the current status of the evaluation: In Progress - being edited by the Project Administrator and Contractor Submitted - sent to Contract Sponsor for review Rejected - sent back to Project Administrator for revision Completed - Approved by the Contract Sponsor Under Appeal - Appeal received from Contractor Appeal Approved - Appeal approved by Regional Director or Executive Director Appeal Rejected - Appeal rejected by Regional Director or Executive Director
Evaluation Criteria	Displays a combination of the Contract Phase (i.e. pre-tender, post-tender) and the Criteria Name fields. Both fields come from the Maintain Evaluation Criteria screen of the contract.
Pre-Qualification Category	Displays the Pre-Qualification Work Category associated with the Evaluation Criteria.
Initial Upset	Displays the upset limit ($) of the contract when it was first created.
Current Upset	Displays the current upset limit ($) including all funding allocations.
PSS Review Status	Displays the status of the Professional Services - Consulting review. The PSS Review Status' are: Submitted, Approved, Returned, and Include in Past Performance. PMA Delivery sets the status to Submitted when the Evaluation Status is set to Completed, Appeal Approved, or Appeal Rejected. Returned is not available if the Evaluation has gone through an Appeal. Include in Past Performance opens the Past Performance Date field and impacts the Past Performance Reports.
Include in Past Performance Date	Displays the date when the ratings of the evaluation are to be included in any Past Performance reports.
PSS Return Remarks	Available to PSS Consulting users when an Evaluation is Returned. Allows comments to be entered as to why the evaluation is being returned to the Project Administrator.
PSS Reviewer	Displays the name of the person from Professional Services Section - Consulting who performed the review.

Work Activities Tab

The Work Activities tab displays the work activities - engineering and construction. The engineering work activities listed, are those selected when the evaluation criteria was created. These are the work activities to be evaluated. Most of the information is copied from the contract.

Hint: Expanding the engineering work activities displays the associated construction work activities.

Figure 20.2 Maintain Contract Evaluation screen - Work Activities tab

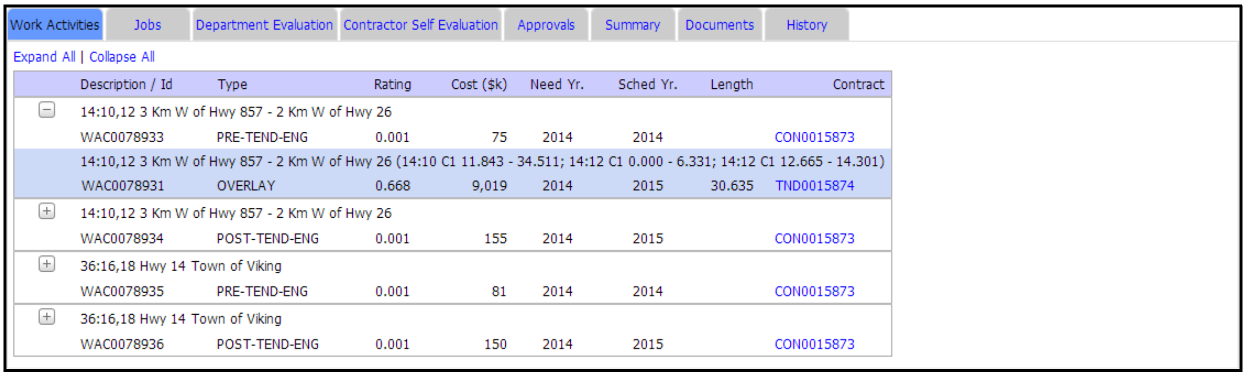


Table 20.2 Maintain Contract Evaluation Work Activities tab - field definitions

Field	Description
Expand All/Collapse All (button)	Used to expand or collapse any work activity having sub-work activities.
Description/Id	Displays the Description of the work activity and the Work Activity Code.
Type	Displays the Work Activity Type (i.e. General, Pre-Tender Engineering, Post-Tender Engineering, etc.).
Rating	Displays the Benefit Cost Rating.
Cost	Displays the estimated cost (in $ thousands) of the Work Activity.
Need Year	Displays the year in which the Work Activity is recommended to start.
Scheduled Year	Displays the year in which the Work Activity is scheduled to start.
Length	Displays the length (if applicable) of the road impacted by the Work Activity.
Contract	Displays the Contract Number (as a link to the Maintain Contract screen) associated with the Work Activity. For construction work activities, the link is to the Maintain Tender screen until the construction contract becomes active.

Jobs Tab

The Jobs tab lists the Job Costers that are to be included in the evaluation. Most of the information displayed on the tab is copied from the Contracts' expenditure estimates.

Figure 20.3 Maintain Contract Evaluation - Jobs tab

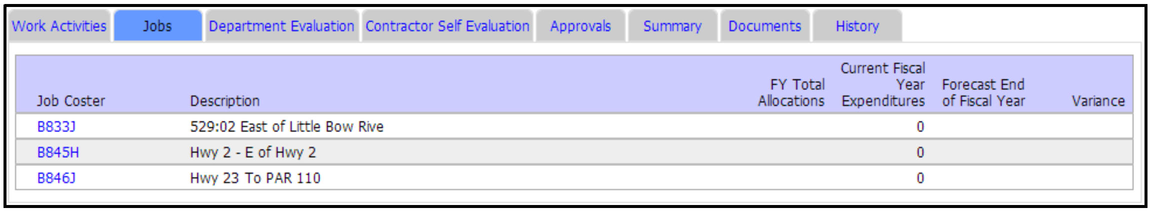


Table 20.3 Maintain Contract Evaluation Jobs tab - field definitions

Field	Description
Job Coster	Displays the Job Coster ID.
Description	Displays the description of the job coster.
Fiscal Year Total Allocations	Displays the dollar amount of allocations for the job coster in the current fiscal year.
Current Fiscal Year Expenditures	Displays the total dollar amount processed to date, through IMAGIS, against the job coster in the current fiscal year.
Forecast End of Fiscal Year	Displays the current dollar amount forecast to be spent in the current fiscal year.
Variance	Displays the variance of the criteria.

Department Evaluation Tab

The Department Evaluation tab displays the criterion of the evaluation. The Criterion and Weightings were established when the Evaluation Criteria was created. The criterion and weightings are copied into the tab. The Project Administrator enters the results of the Department Evaluation, by selecting Ratings and entering the Rationale. PMA Delivery will calculate the Weighted Rating values.

Hint: The Department Evaluation tab is not available to external users until the Evaluation has been Submitted to the Contract Sponsor by the Project Administrator.

Figure 20.4 Maintain Contract Evaluation - Department Evaluation tab

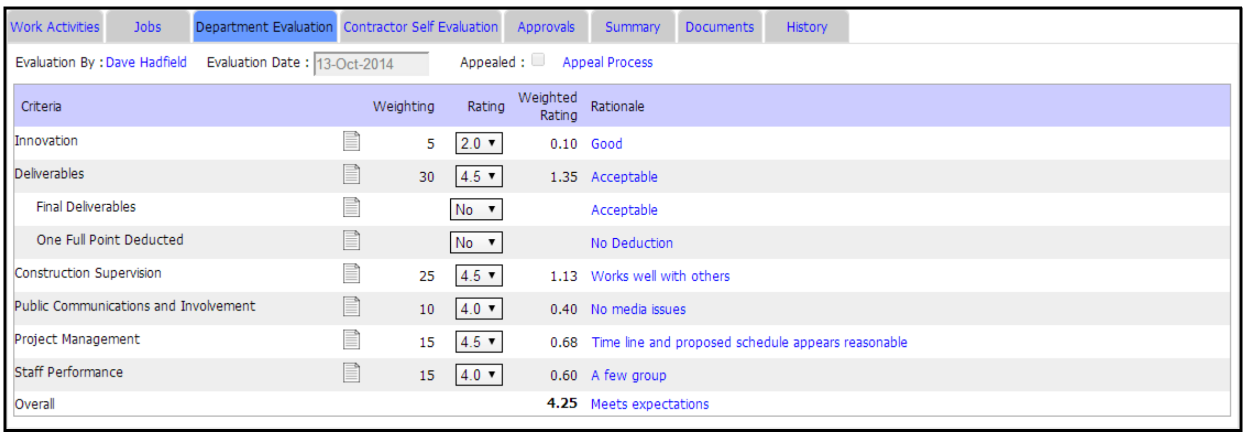


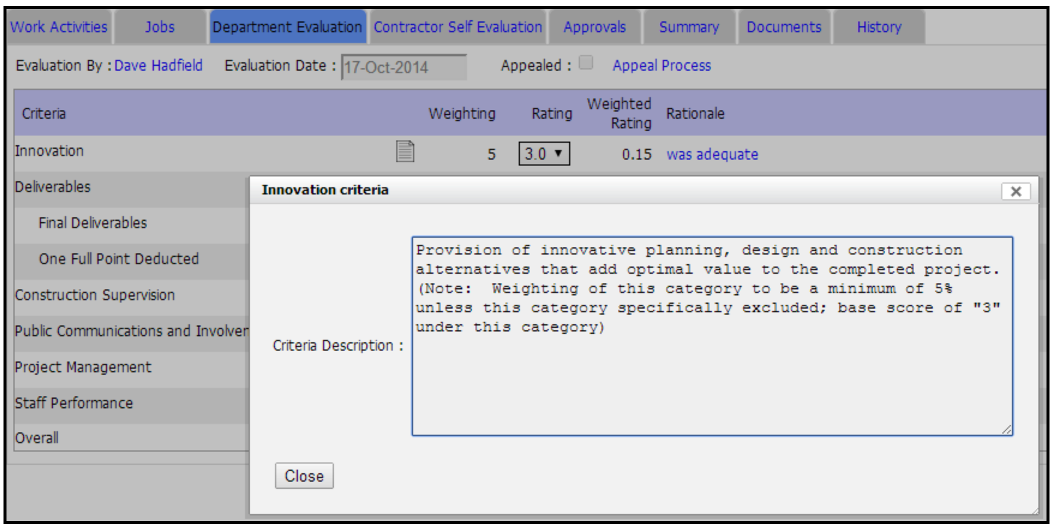
Table 20.4 Maintain Contract Evaluation Department Evaluation tab - field definitions

Field	Description
Evaluation By	Displays the person who entered the Department Evaluation (typically the Project Administrator).
Evaluation Date	Displays the Date the Department Evaluation was entered and first saved.
Appealed (check box)	Used to indicate that a Notice of Appeal has been received (yes/no) by the AT Regional Director.
Appeal Process	Displays the 'Consultant Performance Evaluation Appeals Process' - Project Administration Bulletin No.4/ 2011 as a PDF.
Criteria	Displays the Criteria Types being used in the evaluation.
Criteria Description (button)	Opens a window displaying a description of the criteria.
Weighting	Displays the weighting to be applied to the criteria.

Table 20.4 Maintain Contract Evaluation Department Evaluation tab - field definitions

Field	Description
Rating	Displays the rating given to each criteria type. Used by the Project Administrator to select the rating value (drop down field with values from 0 to 5 in half point increments).
Weighted Rating	A calculation that uses the Weighting times the Rating for the criteria.
Rationale	Displays the reason(s) given for rating of the criteria. Used by the Project Administrator to type the rationale for the rating given.

Figure 20.5 Maintain Contract Evaluation - Criteria Description example



Contractor Self Evaluation Tab

The Contractor Self Evaluation tab is used to record the Contractors Ratings and the Rationale. Values can be entered:

- by Contractors with appropriate security access
- by Project Administrators after receipt of the completed Vendor Self Evaluation form

Contractors with the appropriate access can enter ratings and rationale.

Contractors may opt to submitting their evaluation by completing the Vendor Self Evaluation form and sending it to the Project Administrator. If the Contractor does not have adequate access, the Project Administrator can make the Vendor Self Evaluation file available upon request. The Vendor/Contractor returns the completed file to the Project Administrator. The Project Administrator enters the values in the file; into the Contractor Evaluation tab and saves the file on the Documents tab.

Figure 20.6 Maintain Contract Evaluation - Contractor Self Evaluation tab No Eval

Hint: Contractors can use both the on-line entry and submit the Vendor Self Evaluation form.

Figure 20.7 Maintain Contract Evaluation - Contractor Self Evaluation tab

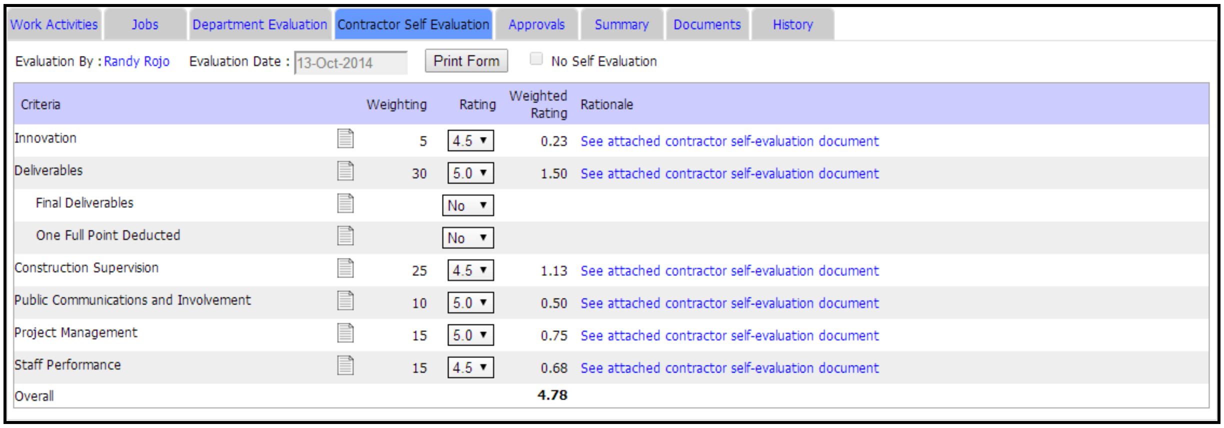


Table 20.5 Maintain Contract Evaluation Contractor Self Evaluation tab - field definitions

Field	Description
Evaluation By	Displays the Contractors representative who completed the form or on-line entry.
Evaluation Date	Displays the Date the Contractor Self Evaluation was completed (according to the file).
Print Form (button)	Used to generate the Vendor Self Evaluation form in a protected Excel format. With the exception of the contractors cells (yellow), all others are password protected.
No Self Evaluation (check box)	Defaults to checked. When checked, none of the fields on the tab are displayed. When unchecked the Contractor Self Evaluation tab becomes active.
Criteria	Displays the Criteria Types being used in the evaluation.
Criteria Description (button)	Opens a window displaying a description of the criteria.
Weighting	Displays the weighting to be applied to the criteria.
Rating	Displays the rating given for the criteria. Used by the Contractor or Project Administrator to enter the contractors rating value (drop down field with values from 0 to 5 in half point increments).
Weighted Rating	A calculation that uses the Weighting times the Rating for the criteria.
Rationale	Typically references the attached Contractor Self Evaluation file.

Approvals Tab

The Approvals tab is used to record the names and roles of the reviewers, and the dates and recommended actions applied to the evaluation.

Figure 20.8 Maintain Contract Evaluation - Approvals tab

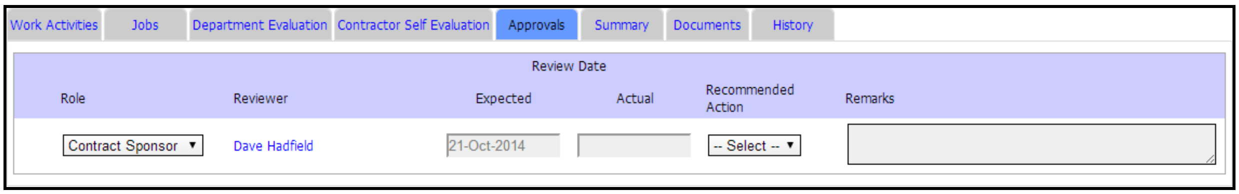


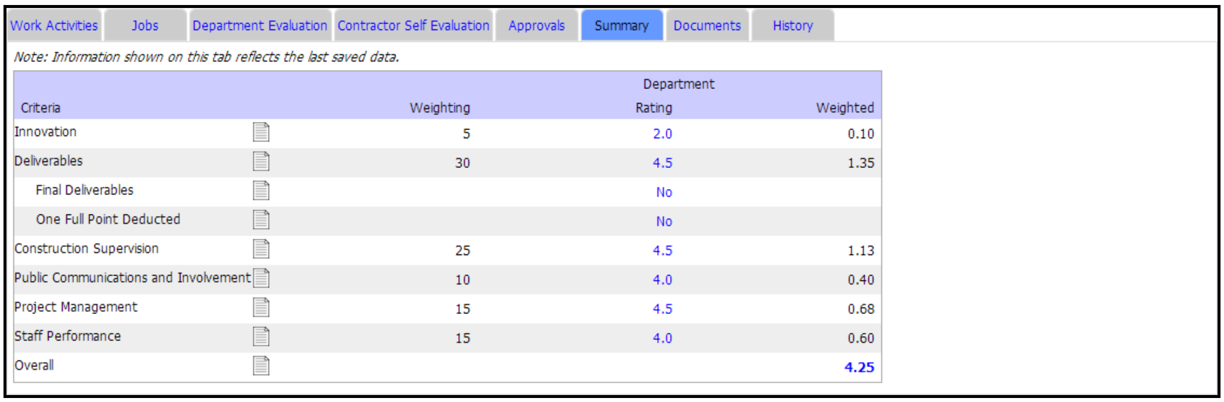
Table 20.6 Maintain Contract Evaluation Approvals tab - field definitions

Field	Description
Role	The PMA Delivery security role that should enter the recommended action.
Reviewer	The TIMS Party ID given the ability to enter the Recommended Action. The reviewer must be logged into PMA and only the reviewer can enter a Recommended Action.
Expected	Displays the date by which the recommended action is 'expected' to be entered. When roles are added to the Approvals tab, the default expected date is two weeks from the current date.
Actual	Displays the date when the Recommended Action was actually entered and Saved.
Recommended Action	The recommendation applied to the evaluation: Rejected - returned to the Project Administrator for revision by the Contract Sponsor role. Completed - Approved by the Contract Sponsor role. Appeal Rejected - contractors appeal rejected by either the Regional Director or Executive Director.
Remarks	The reason for the recommendation. Information that would be in addition to the comments entered in any Rationale fields.

Summary Tab

The Summary tab is used to display all of the ratings and weighted values from all of the evaluations in play. This tab is dynamically edited. If only the Department Evaluation has been entered, then only Department Ratings and Weighted values appear on the tab. When the Contractor Self Evaluation values are entered, the Contractor columns are added. If an Appeal is created, Appeal columns appear on the tab.

Figure 20.9 Maintain Contract Evaluation - Summary tab - Department only



Work Activities | Jobs | Department Evaluation | Contractor Self Evaluation | Approvals | Summary | Documents | History

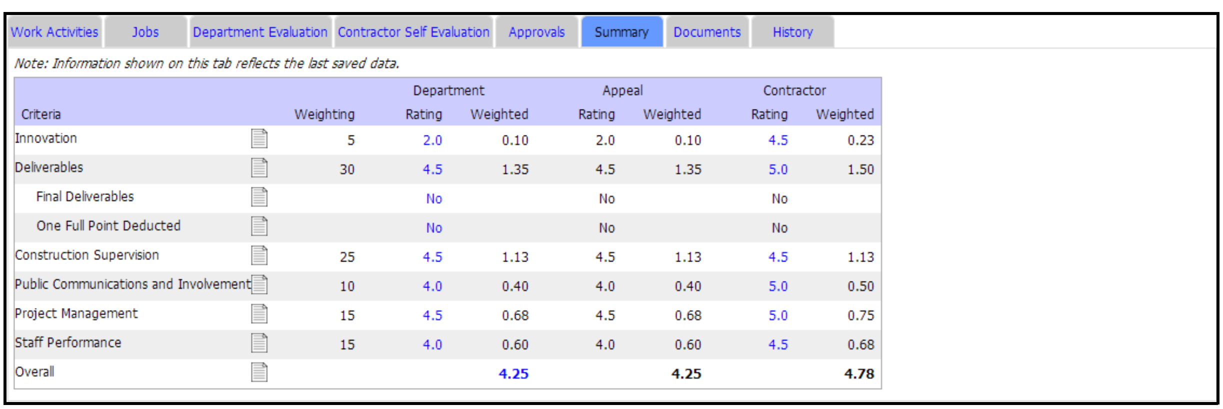
Note: Information shown on this tab reflects the last saved data.

Criteria	Weighting	Department Rating	Department Weighted
Innovation	5	2.0	0.10
Deliverables	30	4.5	1.35
Final Deliverables		No	
One Full Point Deducted		No	
Construction Supervision	25	4.5	1.13
Public Communications and Involvement	10	4.0	0.40
Project Management	15	4.5	0.68
Staff Performance	15	4.0	0.60
Overall			**4.25**

Table 20.7 Maintain Contract Evaluation Summary tab - field definitions

Field	Description
Criteria	Displays the Criteria Types being used in the evaluation.
Criteria Description (button)	Opens a window displaying a description of the criteria.
Weighting	Displays the weighting to be applied to the criteria.
Rating	Displays the rating given for each criteria type. Values are copied from the Department Evaluation, Appeal Evaluation, and Contractor Self Evaluation tabs.
Weighted	A calculation using the Weighting times the Rating.

Figure 20.10 Maintain Contract Evaluation - Summary tab - with Appeal



Work Activities | Jobs | Department Evaluation | Contractor Self Evaluation | Approvals | Summary | Documents | History

Note: Information shown on this tab reflects the last saved data.

Criteria	Weighting	Department Rating	Department Weighted	Appeal Rating	Appeal Weighted	Contractor Rating	Contractor Weighted
Innovation	5	2.0	0.10	2.0	0.10	4.5	0.23
Deliverables	30	4.5	1.35	4.5	1.35	5.0	1.50
Final Deliverables		No		No		No	
One Full Point Deducted		No		No		No	
Construction Supervision	25	4.5	1.13	4.5	1.13	4.5	1.13
Public Communications and Involvement	10	4.0	0.40	4.0	0.40	5.0	0.50
Project Management	15	4.5	0.68	4.5	0.68	5.0	0.75
Staff Performance	15	4.0	0.60	4.0	0.60	4.5	0.68
Overall			**4.25**		**4.25**		**4.78**

Documents Tab

The Documents tab is used to record the documents, files and correspondence during the life cycle of the evaluation criteria. This can include picture and email files.

Figure 20.11 Maintain Contract Evaluation - Documents tab

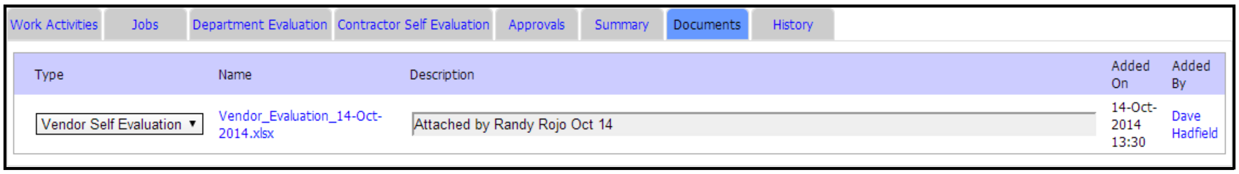


Table 20.8 Maintain Contract Evaluation Documents tab - field definitions

Field	Description
Type	Used to further define the type of document (Vendor Self Evaluation, Other).
Name	Displays the file name. If the user has the appropriate software, clicking the link will open the file.
Description	A manually typed description of the files contents.
Added On	The date and time when the file was added to the evaluation criteria.
Added By	The name of the person who added the file.

Hint: Each Document Type can be used more than once. Saving versions of the Vendor Self Evaluation or Department Evaluation is possible. Use text in the Description to distinguish one version from another.

Contract Evaluation - History Tab

The History tab is used to record the actions taking place on the evaluation. Each time the evaluation is saved, the date and time and everything that has happened since the last save, are recorded. The person who performed the action(s) is also recorded.

Figure 20.12 Maintain Contract Evaluation - History tab

Table 20.9 Maintain Contract Evaluation History tab - field definitions

Field	Description
Date	Displays the Date and Time the evaluation was Saved.
User	Displays the TIMS Party name of the person who performed the save.
Description	A PMA Delivery generated description of the action that took place.

Chapter 21: Contract Evaluation Process

This chapter presents the evaluation process and the steps involved from the creation of the evaluation through to it's final approval. The steps performed by Transportation staff are identified in the section headings.

Topics in Chapter:

Overview of Contract Evaluation Process

This chapter covers the evaluation process. Based on a mutually pre-arranged schedule, Contract Evaluations are performed between the Project Administrator and the Contractor. Evaluations can be held after the completion of major milestones in the contract (i.e. Detailed Design, Tender Package Preparation, Construction) or on the anniversary of a multi-year contract.

Hint: Initially evaluations are only performed on Consulting Contracts. However, this will change in the future. Therefore, the term Contractor is used versus Consultant.

The process of performing a Contract Evaluation outlined below is for contractors having External Access to PMA Delivery. For contractors without External Access the on-line steps do not apply. During step 2, the Project Administrator would use the Print Form button and email the Vendor Self Evaluation spreadsheet to the Contractor.

1. Project Administrator creates the Evaluation (In Progress) and removes the No Self Evaluation check mark.
2. The Project Administrator notifies the Consultant with an email that the Evaluation has been created (attached Vendor Self Evaluation form).
3. Project Administrator enters Department Evaluation: Ratings and Rationale
4. Contractor enters Contractor Self Evaluation: Ratings and Rationale
5. Contractor reviews and selects Submit to Transportation. Email sent to Project Administrator and Contract Sponsor (attached completed Vendor Self Evaluation form)
6. Project Administrator attaches Vendor Self Evaluation form to Documents tab.
7. Project Administrator reviews Contractors' Self Evaluation tab: Ratings and Rationale
8. Project Administrator submits the evaluation for approval (Submitted)
    a) Email generated to inform Contract Sponsor of submitted evaluation
9. Contractor may view the Department Evaluation tab and the Contractor Self Evaluation tab. Can select Print Form button.
10. If Contractor does not accept Department Evaluation:
    - Meeting arranged with Project Administrator, Contractor and Contract Sponsor
    - Changes to Department Evaluation may or may not be made

following the meeting.
- Consultant has option of Appealing

11. Contract Sponsor reviews the evaluation
    a) If the Sponsor is satisfied with the evaluation:
       - Contract Sponsor selects Approve
    b) If Sponsor selects Reject:
       - an Email (with links to the evaluation) is generated to notify the Project Administrator (Evaluation By) of the rejection
       - Evaluation Status set to Rejected
       - Contractor may edit Contractor Self Evaluation tab and Print Form.
       - Project Administrator may edit Department Evaluation tab.
       - Project Administrator re-submits evaluation for approval.
12. Evaluation Status set to Completed
13. Final copy of evaluation printed as PDF and copy sent to Contractor

Alert! Even if the Department Evaluation is not acceptable to the Contractor, the Contract Sponsor will continue with the Approval of the Evaluation. The Consultant has two weeks following the receipt of the Final copy of the Evaluation to Appeal.

Figure 21.1 Process Overview for Contract Evaluation Approval

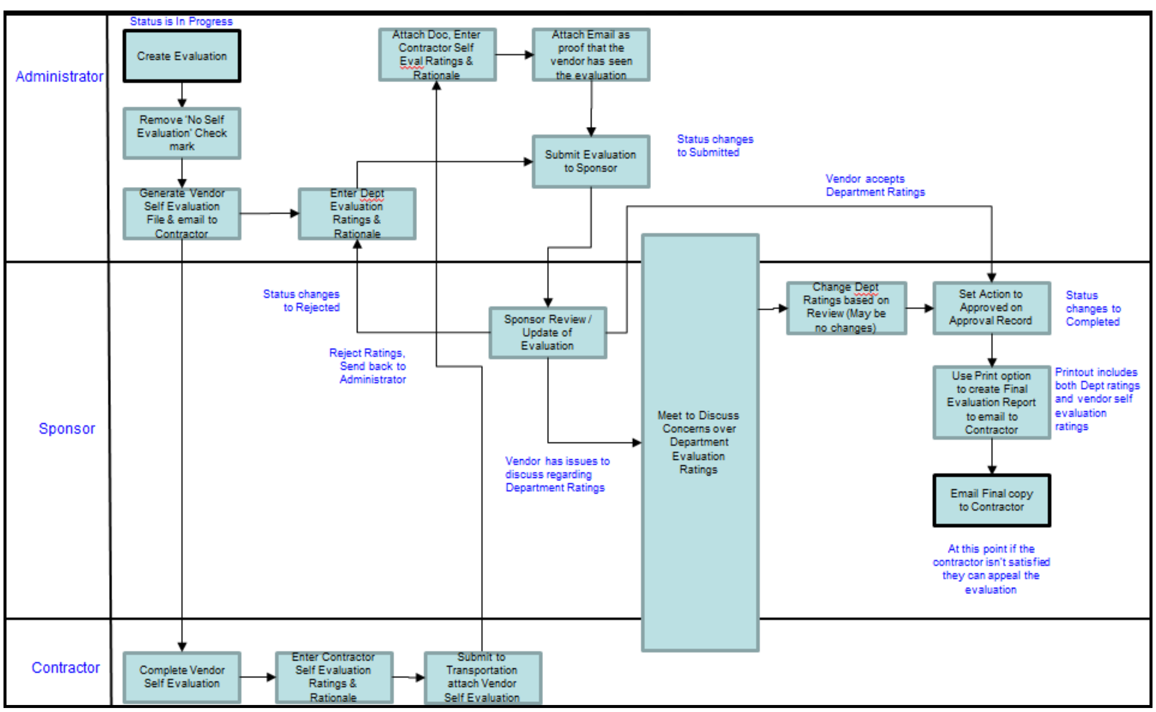
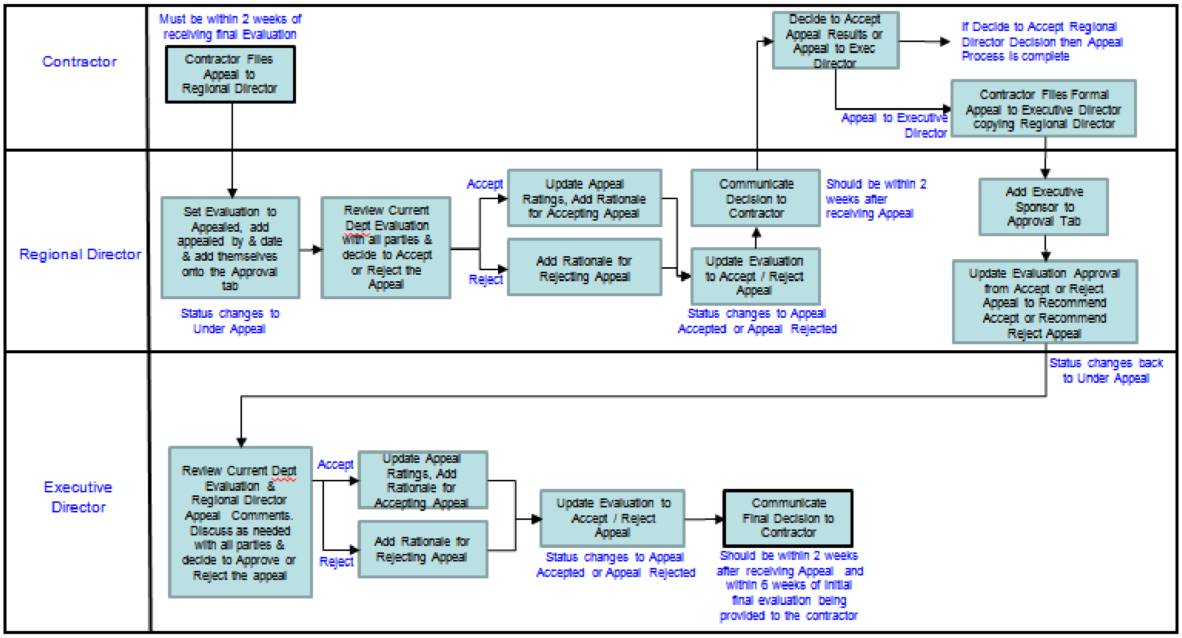


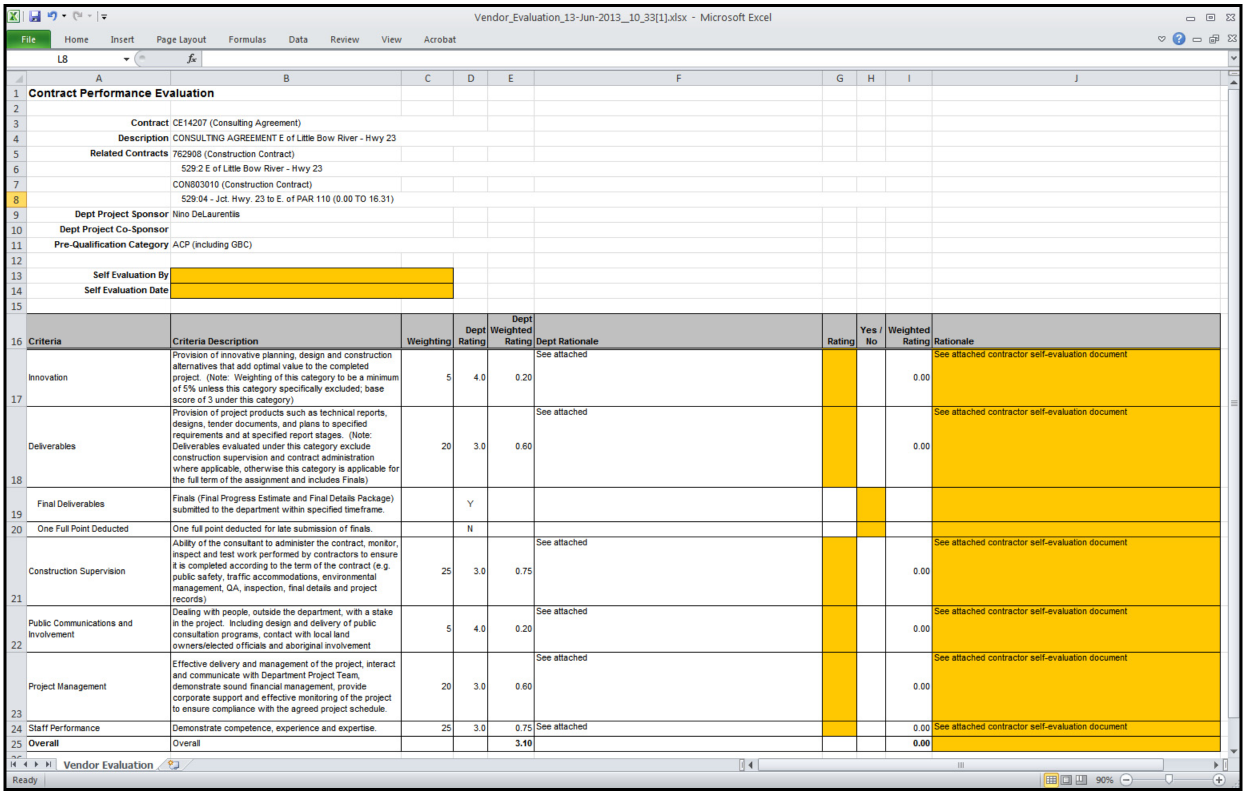
Figure 21.2 Process Overview for Contract Evaluation Appeal



Contractors Without External Access

For contractors who do not have employees with External Access to PMA Delivery; the on-line steps (above) do not apply. During step 2, it is important the Project Administrator uses the Print Form button and attaches the Vendor Self Evaluation spreadsheet in the email to the Contractor. The Contractor completes the spreadsheet and returns it to the Project Administrator. The Project Administrator attaches the spreadsheet to the evaluation (Documents tab) and enters the values from the spreadsheet into the Contract Self Evaluation tab.

Figure 21.3 Vendor Self Evaluation example - with Department Evaluation



Vendor_Evaluation_13-Jun-2013__10_33[1].xlsx - Microsoft Excel

Contract Performance Evaluation

Contract	CE14207 (Consulting Agreement)
Description	CONSULTING AGREEMENT E of Little Bow River - Hwy 23
Related Contracts	762908 (Construction Contract)
	529:2 E of Little Bow River - Hwy 23
	CON803010 (Construction Contract)
	529:04 - Jct. Hwy. 23 to E. of PAR 110 (0.00 TO 16.31)
Dept Project Sponsor	Nino DeLaurentiis
Dept Project Co-Sponsor	
Pre-Qualification Category	ACP (including GBC)
Self Evaluation By	
Self Evaluation Date	

Criteria	Criteria Description	Weighting	Dept Rating	Dept Weighted Rating	Dept Rationale	Rating	Yes / No	Weighted Rating	Rationale
Innovation	Provision of innovative planning, design and construction alternatives that add optimal value to the completed project. (Note: Weighting of this category to be a minimum of 5% unless this category specifically excluded; base score of 3 under this category)	5	4.0	0.20	See attached			0.00	See attached contractor self-evaluation document
Deliverables	Provision of project products such as technical reports, designs, tender documents, and plans to specified requirements and at specified report stages. (Note: Deliverables evaluated under this category exclude construction supervision and contract administration where applicable, otherwise this category is applicable for the full term of the assignment and includes Finals)	20	3.0	0.60	See attached			0.00	See attached contractor self-evaluation document
Final Deliverables	Finals (Final Progress Estimate and Final Details Package) submitted to the department within specified timeframe.		Y						
One Full Point Deducted	One full point deducted for late submission of finals.		N						
Construction Supervision	Ability of the consultant to administer the contract, monitor, inspect and test work performed by contractors to ensure it is completed according to the term of the contract (e.g. public safety, traffic accommodations, environmental management, QA, inspection, final details and project records)	25	3.0	0.75	See attached			0.00	See attached contractor self-evaluation document
Public Communications and Involvement	Dealing with people, outside the department, with a stake in the project. Including design and delivery of public consultation programs, contact with local land owners/elected officials and aboriginal involvement	5	4.0	0.20	See attached			0.00	See attached contractor self-evaluation document
Project Management	Effective delivery and management of the project, interact and communicate with Department Project Team, demonstrate sound financial management, provide corporate support and effective monitoring of the project to ensure compliance with the agreed project schedule.	20	3.0	0.60	See attached			0.00	See attached contractor self-evaluation document
Staff Performance	Demonstrate competence, experience and expertise.	25	3.0	0.75	See attached			0.00	See attached contractor self-evaluation document
Overall	Overall			**3.10**				**0.00**	

Vendor Evaluation

Ready

Hint: Depending on the timing of when the Vendor Evaluation form is generated, the Transportation Department Ratings and Rationale may or may not appear.

Maintain Contract Evaluation

When a new Contract Evaluation is created by the Project Administrator, they will notify the Contractor via email. The email contains links to the Evaluation screen in PMA Delivery and to a PDF version of the Evaluation. The email will also contain a copy of the Vendor Evaluation form as an attachment. When the contractor selects the link to the evaluation, if they are not already logged into PMA Delivery, they must login to meet authentication requirements. Once successfully logged in, the Maintain Contract Evaluation screen will be displayed.

Figure 21.4 Maintain Contract Evaluation - Email from AT received

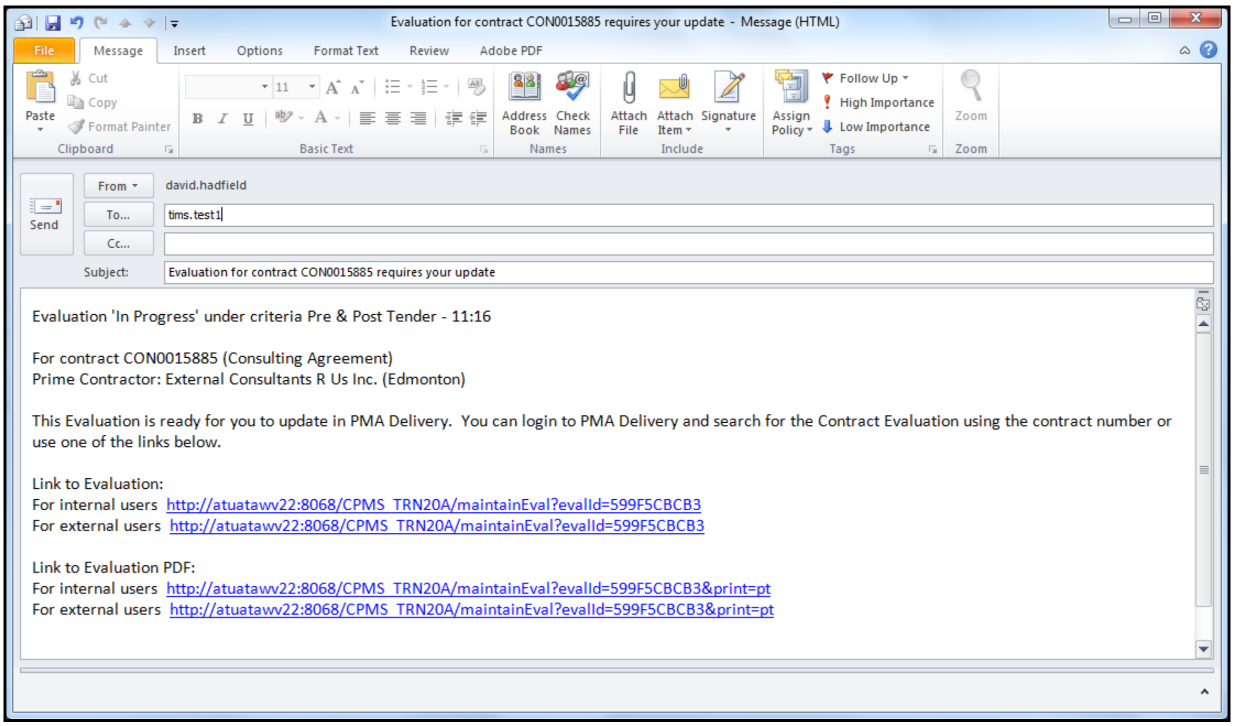
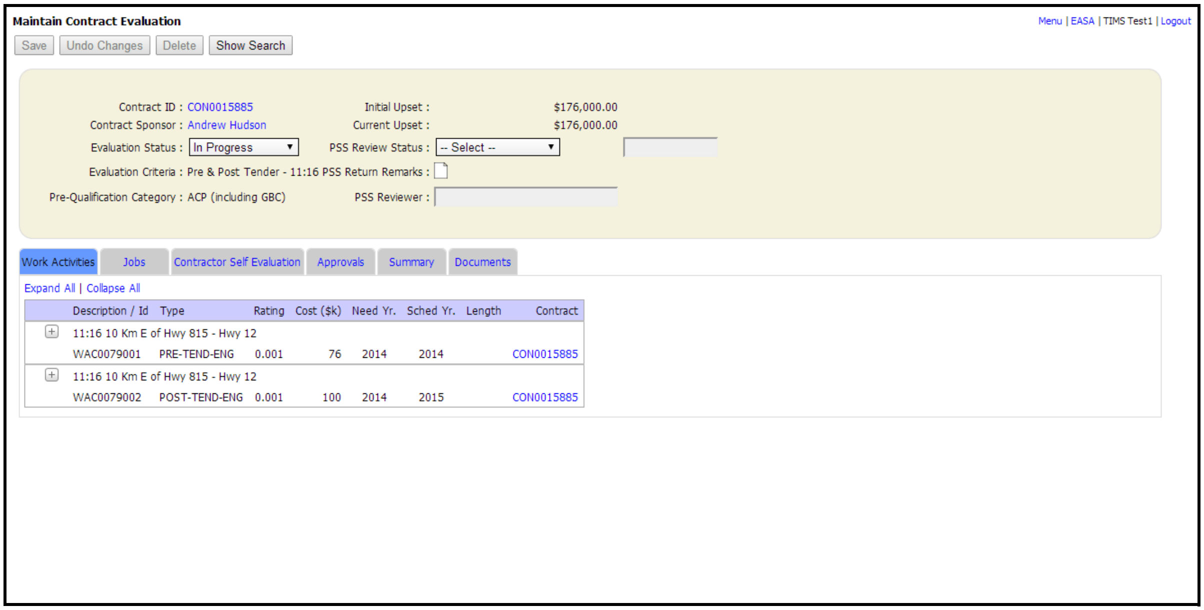
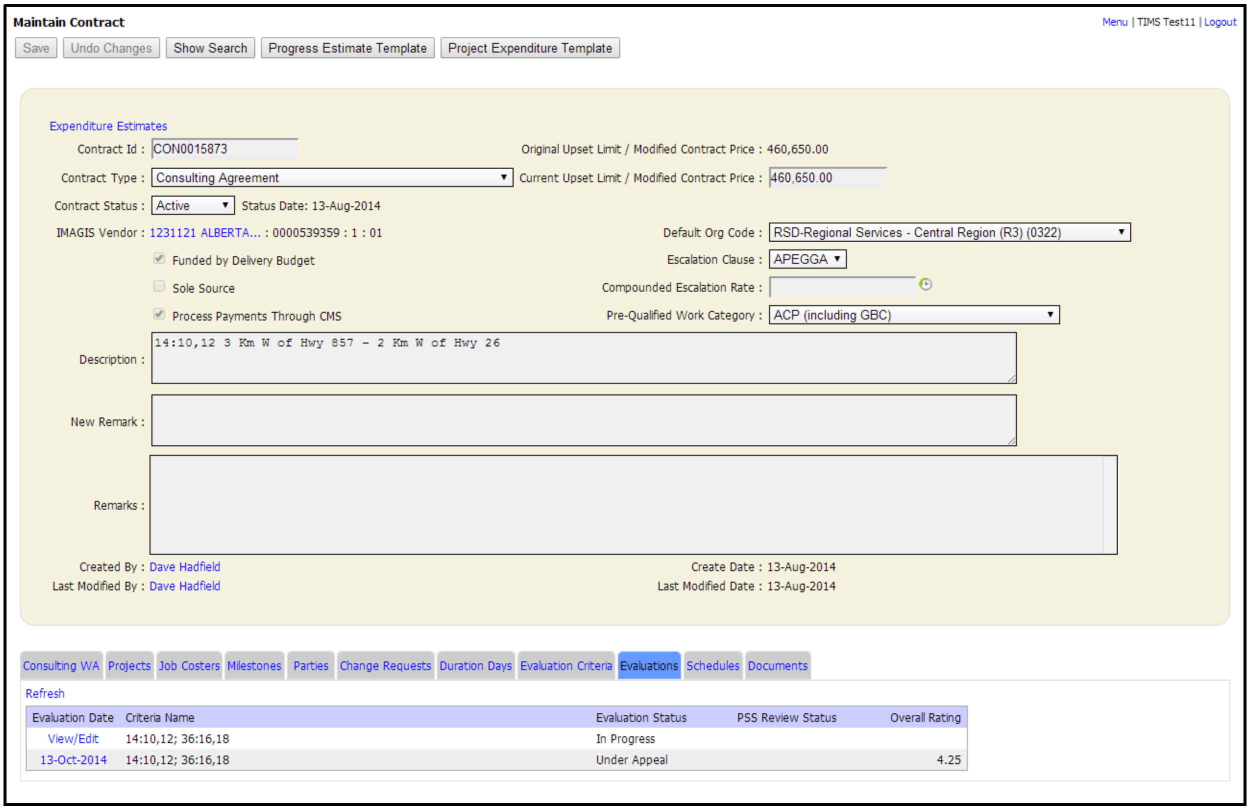


Figure 21.5 Maintain Contract Evaluation - Consultant Login Successful



Once a Contract Evaluation exists, updating the information or adding more information is easy. The Maintain Contracts screen has the Evaluations tab. On the Evaluations tab each evaluation is listed. Selecting the Evaluation Date link will open the Maintain Contract Evaluation screen with the selected evaluation displayed.

Figure 21.6 Maintain Contract screen - Evaluations tab - links



Hint: If neither the Project Administrator nor the Contractor have entered an Evaluation date on their respective tabs, there will be a View/Edit link instead of an Evaluation Date link.

Contractors are able to edit the Contractor Self Evaluation tab when the status of the Evaluation is 'In Progress' or 'Rejected'. Once the Ratings and Rationale have been entered the contractor with Submit security must review the entries and select the Submit to Transportation button. When the Evaluation is Submitted to the Contract Sponsor (by the Transportation Project Administrator), the consultant will be able to view the Departments' Evaluation ratings and rationale.

Figure 21.7 Maintain Contract Evaluation - Contractor Self Evaluation - blank

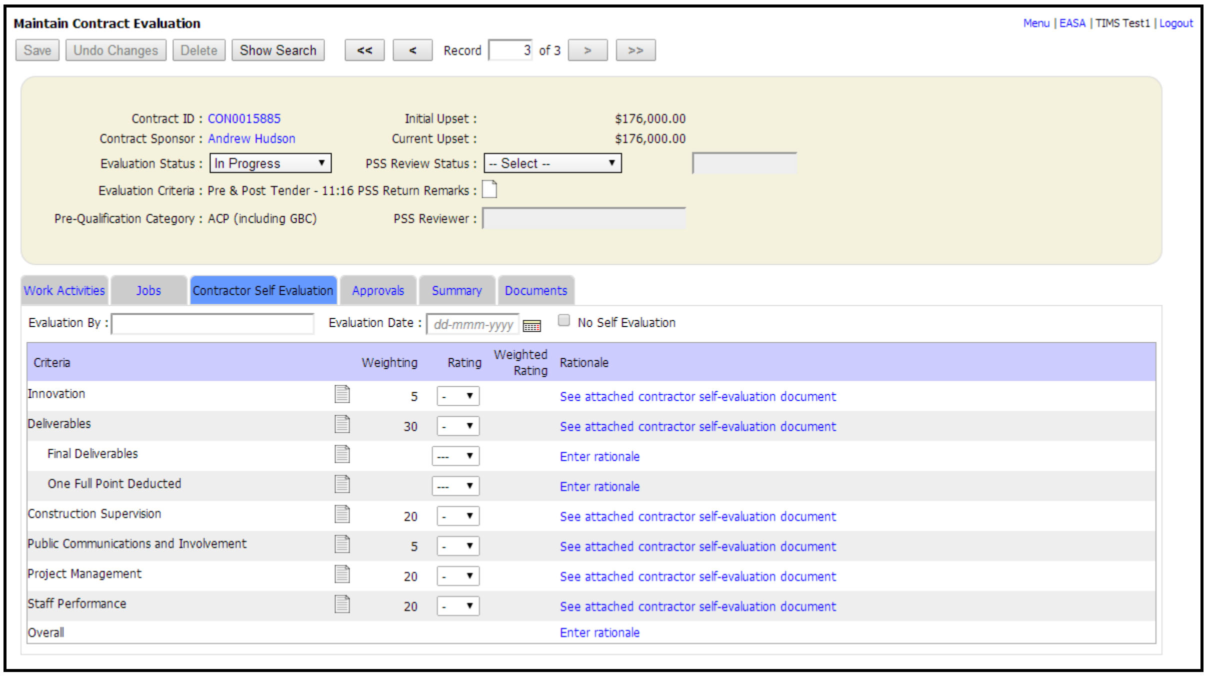


Figure 21.8 Maintain Contract Evaluation - Contractor Self Evaluation - edit

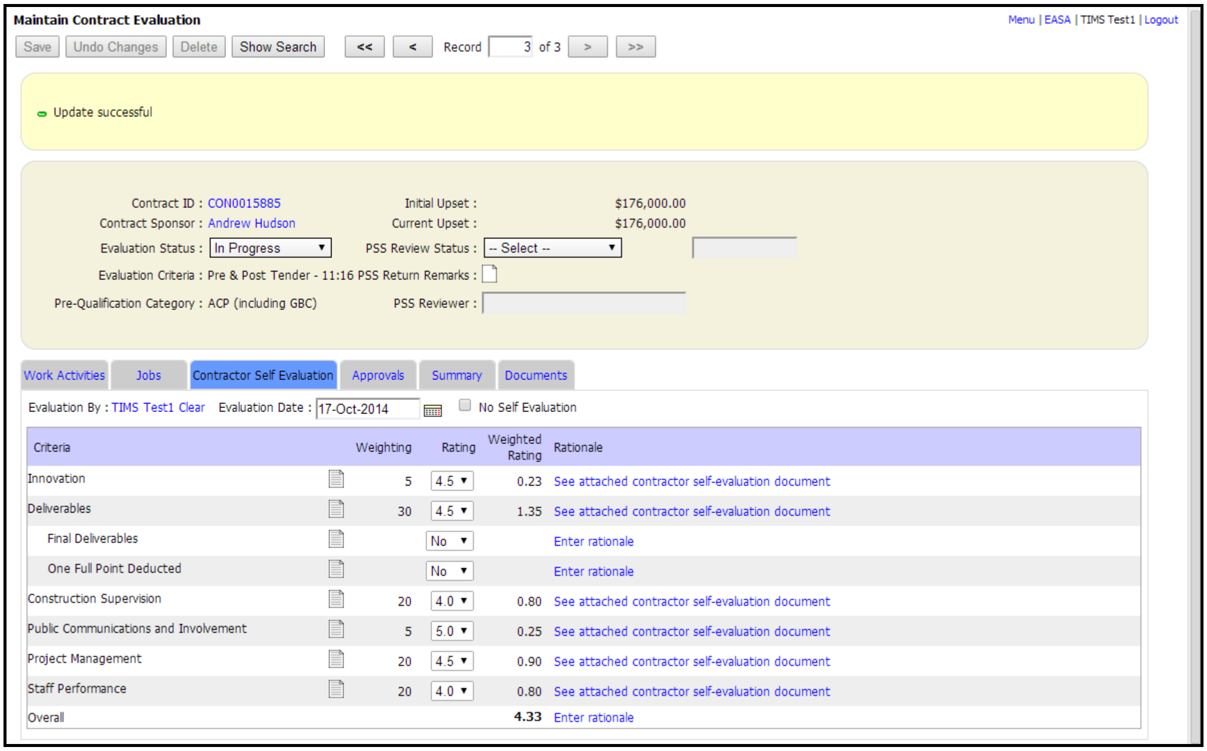
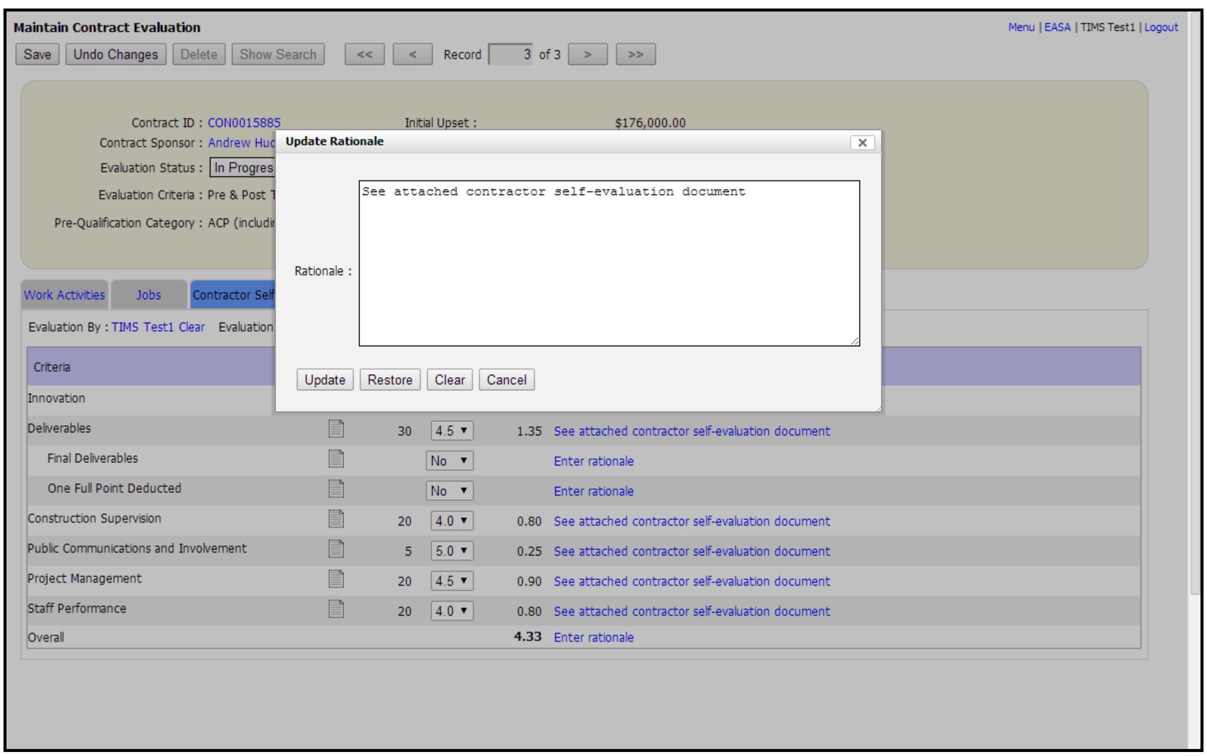


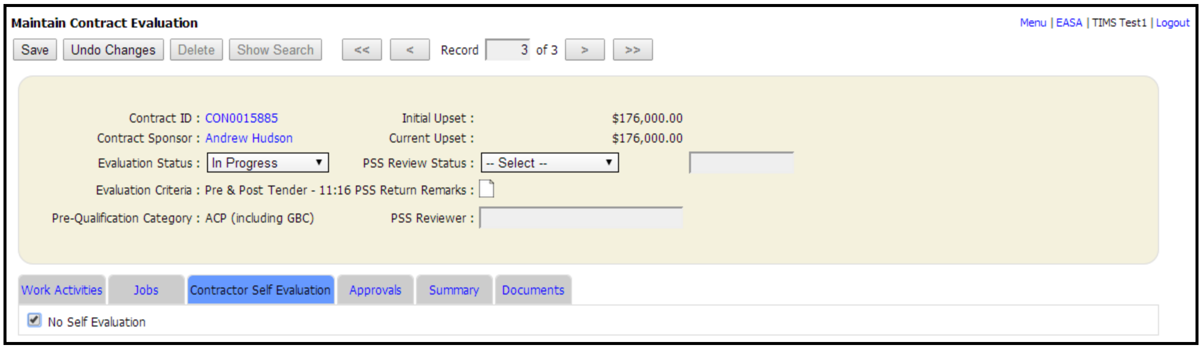
Figure 21.9 Maintain Contract Evaluation - Contractor Self Evaluation - rationale



No Self Evaluation

When the Project Administrator has completed the entry of the ratings and rationale on the Department Evaluation tab they attach the supporting files to the Documents tab. Contractors have the ability to opt-out of entering a Self Evaluation by simply clicking the box to check No Self Evaluation.

Figure 21.10 Maintain Contract Evaluation - Contractor Self Evaluation - No Self Eval

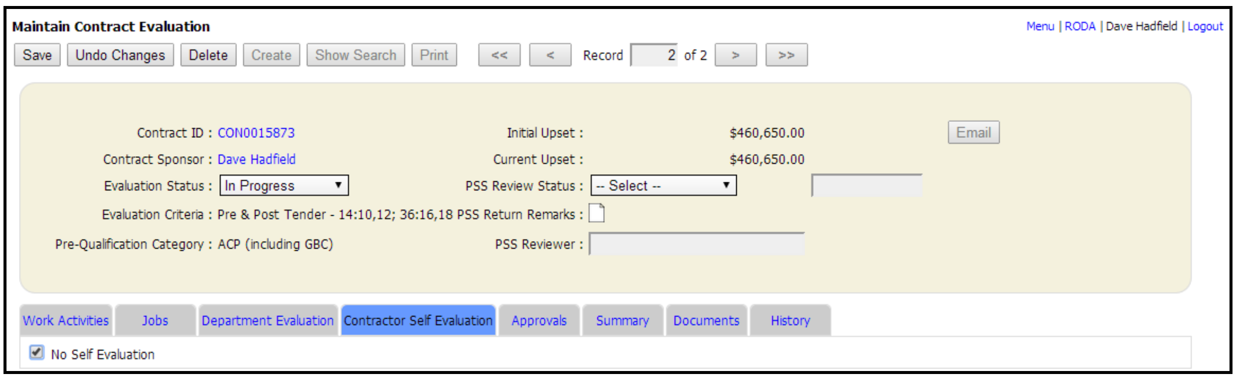


Hint: With the No Self Evaluation box checked, a standard email will need to be sent to the Project Administrator indicating the decision to not submit an evaluation.

Create New Contract Evaluation (Project Admin)

The Transportation Project Administrator has the ability to create a new contract evaluation. Once generated, the Project Administrator can then decide to notify the consultant that the evaluation exists on-line and/or begin entering the Department Ratings and Rationale. When the Project Administrator has completed the entry of the ratings and rationale on the Department Evaluation tab they attach the supporting files to the Documents tab.

Figure 21.11 Contractor Self Evaluation tab - New Evaluation - Self Eval checked



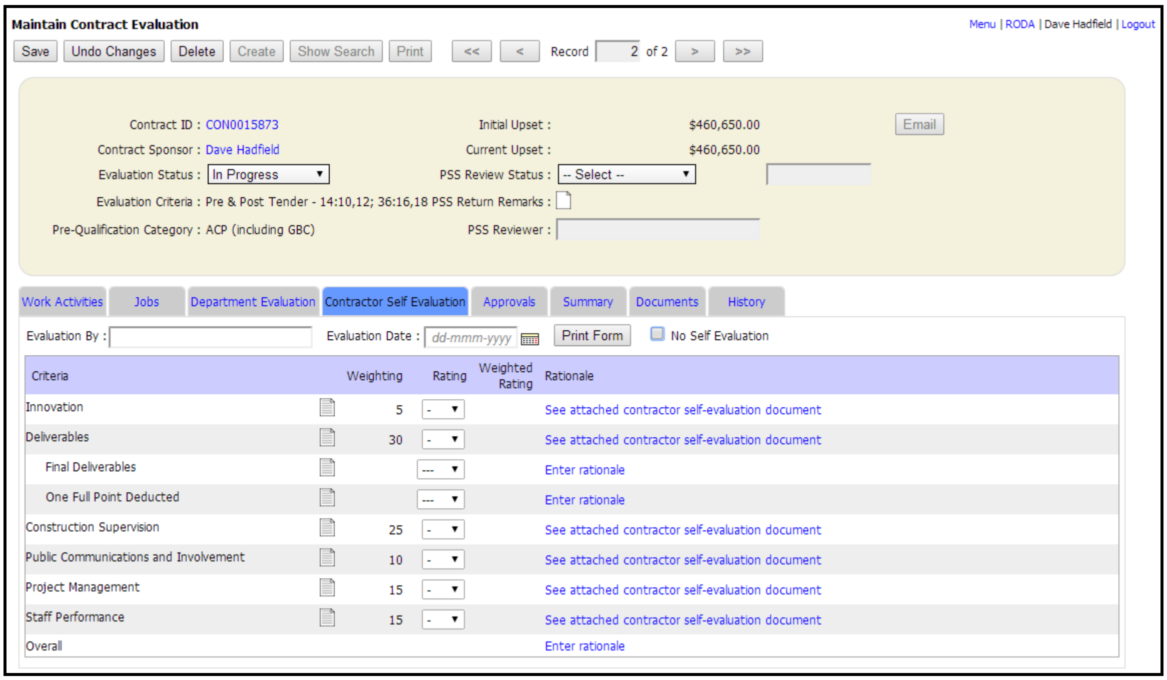
Hint: The default is a check in the No Self Evaluation box.

Notify Contractor (Project Admin)

Once the evaluation exists, the Project Administrator can create a copy of the Vendor Evaluation form and email it to the contractor. The email acts as a notification that the evaluation process has begun and that the contractor can make entries on-line. Alternatively, the contractor may elect to complete the Vendor Evaluation form and submit that (via return email) to the Project Administrator.

Hint: The Print Form button will not display for the Project Administrator until the No Self Evaluation is unchecked.

Figure 21.12 Contractor Self Evaluation tab - New Evaluation - Self Eval unchecked



Contractor Self Evaluation

When the Contractor receives the email, they can make entries on the Contractor Self Evaluation tab. Entries are made until the Contractor is satisfied that the tab is complete and the evaluation is ready to submit to Transportation. The steps for the Contractor are as follows:

1. Contractor receives email with Vendor Evaluation form attached
2. Contractor completes the Contractor Self Evaluation tab on-line
3. Contractor with Submit security role uses the ‘Submit to Transportation’ button to email the Project Administrator and Contract Sponsor (Contractor Self Evaluation form is attached)

Optionally the Contractor/consultant can enter values into the Vendor Evaluation form only (no on-line entry) and return it via email to the Project Administrator. The Project Administrator will attach the form to the Documents tab and enter the values on behalf of the Contractor.

Figure 21.13 Contractor Self Evaluation tab - New Evaluation

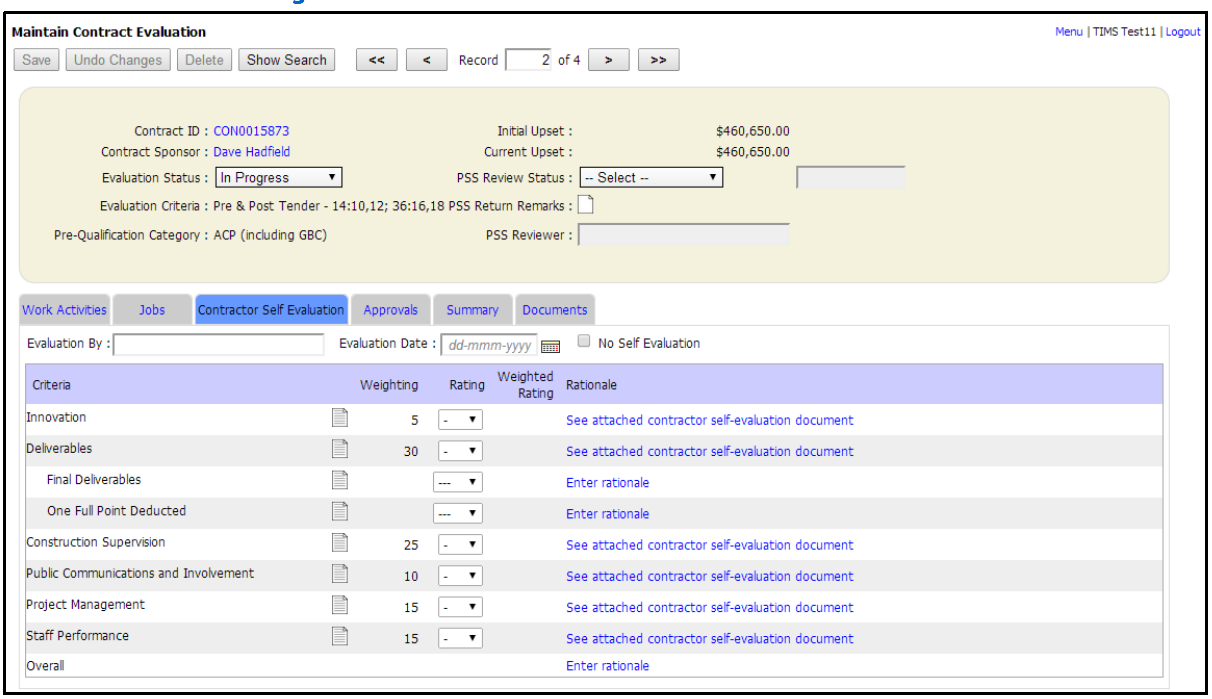
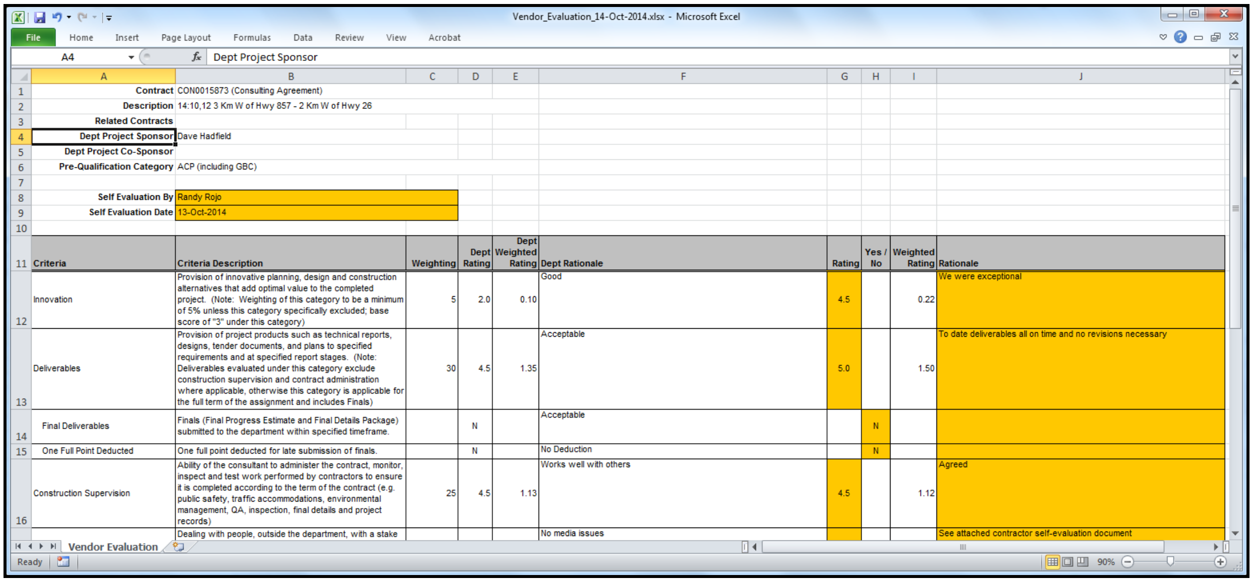


Figure 21.14 Vendor Self Evaluation Form


Vendor_Evaluation_14-Oct-2014.xlsx - Microsoft Excel

A4 Dept Project Sponsor

Contract	CON0015873 (Consulting Agreement)
Description	14:10,12 3 Km W of Hwy 857 - 2 Km W of Hwy 26
Related Contracts	
Dept Project Sponsor	Dave Hadfield
Dept Project Co-Sponsor	
Pre-Qualification Category	ACP (including GBC)
Self Evaluation By	Randy Rojo
Self Evaluation Date	13-Oct-2014

Criteria	Criteria Description	Weighting	Dept Rating	Dept Weighted Rating	Dept Rationale	Rating	Yes / No	Weighted Rating	Rationale
Innovation	Provision of innovative planning, design and construction alternatives that add optimal value to the completed project. (Note: Weighting of this category to be a minimum of 5% unless this category specifically excluded; base score of "3" under this category)	5	2.0	0.10	Good	4.5		0.22	We were exceptional
Deliverables	Provision of project products such as technical reports, designs, tender documents, and plans to specified requirements and at specified report stages. (Note: Deliverables evaluated under this category exclude construction supervision and contract administration where applicable, otherwise this category is applicable for the full term of the assignment and includes Finals)	30	4.5	1.35	Acceptable	5.0		1.50	To date deliverables all on time and no revisions necessary
Final Deliverables	Finals (Final Progress Estimate and Final Details Package) submitted to the department within specified timeframe.		N		Acceptable		N		
One Full Point Deducted	One full point deducted for late submission of finals.		N		No Deduction		N		
Construction Supervision	Ability of the consultant to administer the contract, monitor, inspect and test work performed by contractors to ensure it is completed according to the term of the contract (e.g. public safety, traffic accommodations, environmental management, QA, inspection, final details and project records)	25	4.5	1.13	Works well with others	4.5		1.12	Agreed
	Dealing with people, outside the department, with a stake				No media issues				See attached contractor self-evaluation document

Vendor Evaluation

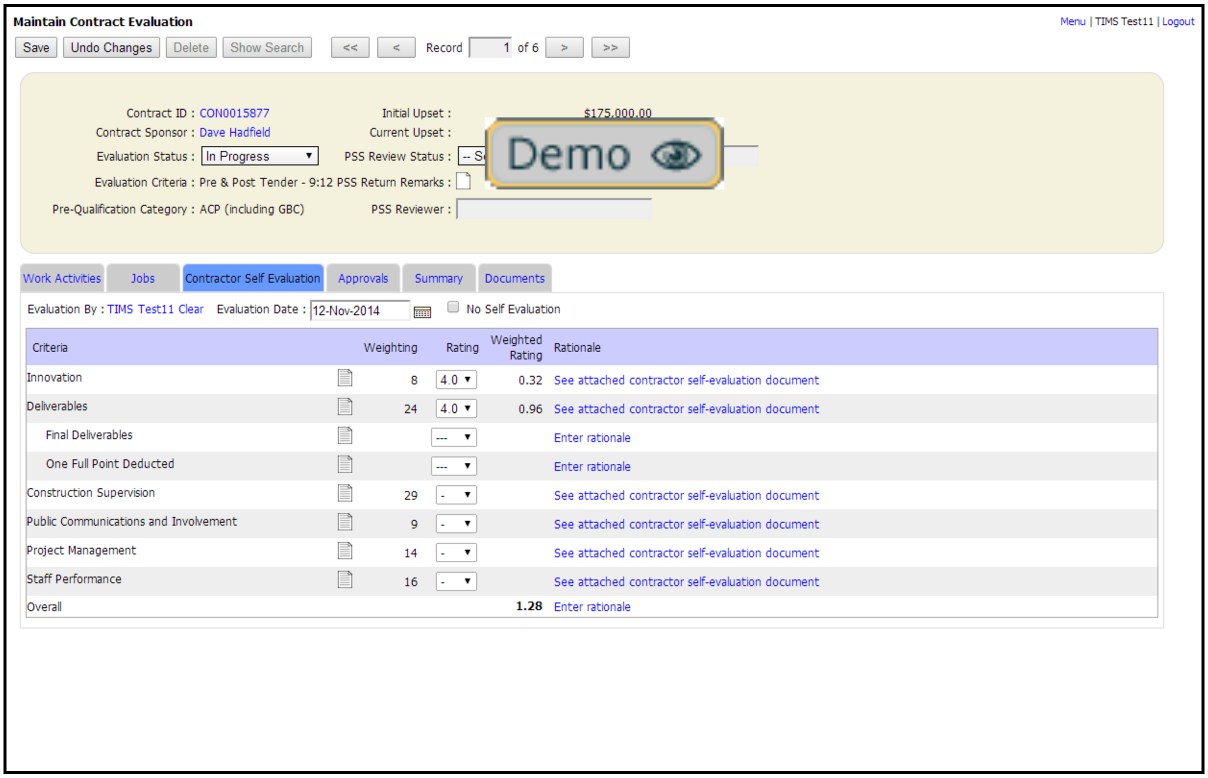
Ready

Hint:	The Contractor may want to retain copies of the original Self Evaluation and the version entered on-line in PMA Delivery.

Contractor Self Evaluation Entry

When the contractor is sent the email with the Vendor Self Evaluation form, they have the option of completing the Contractor Self Evaluation tab on-line or not. If the choice is to not complete the tab, the Contractor checks the No Self Evaluation box located on the Contractor Self Evaluation tab.

Demo 21.1 Enter Contractor Self Evaluation



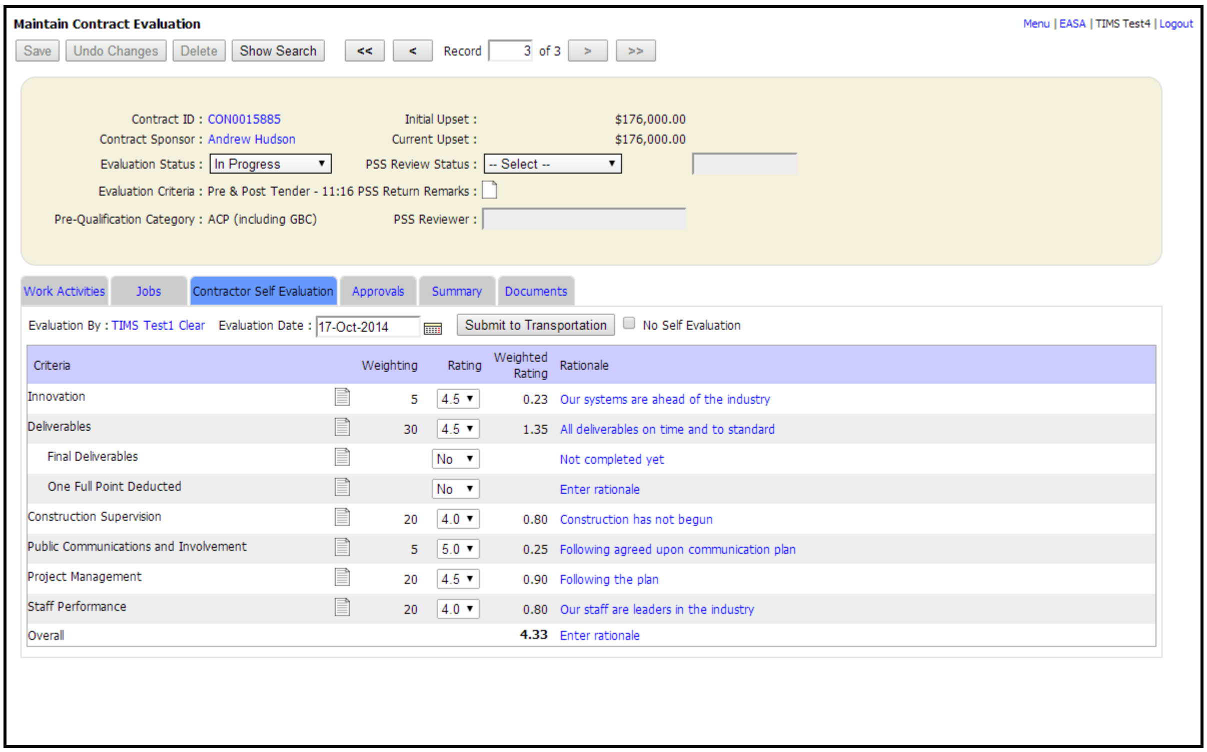
How To

1. From the *Maintain Contract Evaluation* screen under the *Contractor Self Evaluation* tab, select **Ratings** for each criteria.
2. Select the **Save** button.
3. In the *Email* dialog box, click the **Create Email Template (For Outlook)** link.
4. Edit the recipients of the email as necessary.
5. Add text to the body of the email as necessary.
6. Click the **Send** button.
7. In the *Email* dialog box, click the **Close** button.

Submit Evaluation to Transportation

When the Contractor has completed the entry of the ratings and rationale on the Contractor Self Evaluation tab and attached the Vendor Evaluation form to the Documents tab, they notify the Project Administrator and Contract Sponsor. The Submit to Transportation button is available to contractors with the External Access Submit security role. Selecting the Submit to Transportation button creates an email to the Project Administrator and the Contract Sponsor. The status of the Evaluation does not change.

Figure 21.15 Maintain Contract Evaluation screen - Submit to Transportation



Criteria	Weighting	Rating	Weighted Rating	Rationale
Innovation	5	4.5	0.23	Our systems are ahead of the industry
Deliverables	30	4.5	1.35	All deliverables on time and to standard
Final Deliverables		No		Not completed yet
One Full Point Deducted		No		Enter rationale
Construction Supervision	20	4.0	0.80	Construction has not begun
Public Communications and Involvement	5	5.0	0.25	Following agreed upon communication plan
Project Management	20	4.5	0.90	Following the plan
Staff Performance	20	4.0	0.80	Our staff are leaders in the industry
Overall			4.33	Enter rationale

Hint: The Submit to Transportation button has no impact on the status of the Evaluation.

Email Notices

Emails are automatically generated each time the status of a Contract Evaluation is changed. The emails are addressed to the AT staff involved in the evaluation (i.e. Project Administrator who created the evaluation, Contract Sponsor who approved the evaluation). A copy of the email is automatically added to the Outlook Sent folder of the person who sends it.

Figure 21.16 Create Email

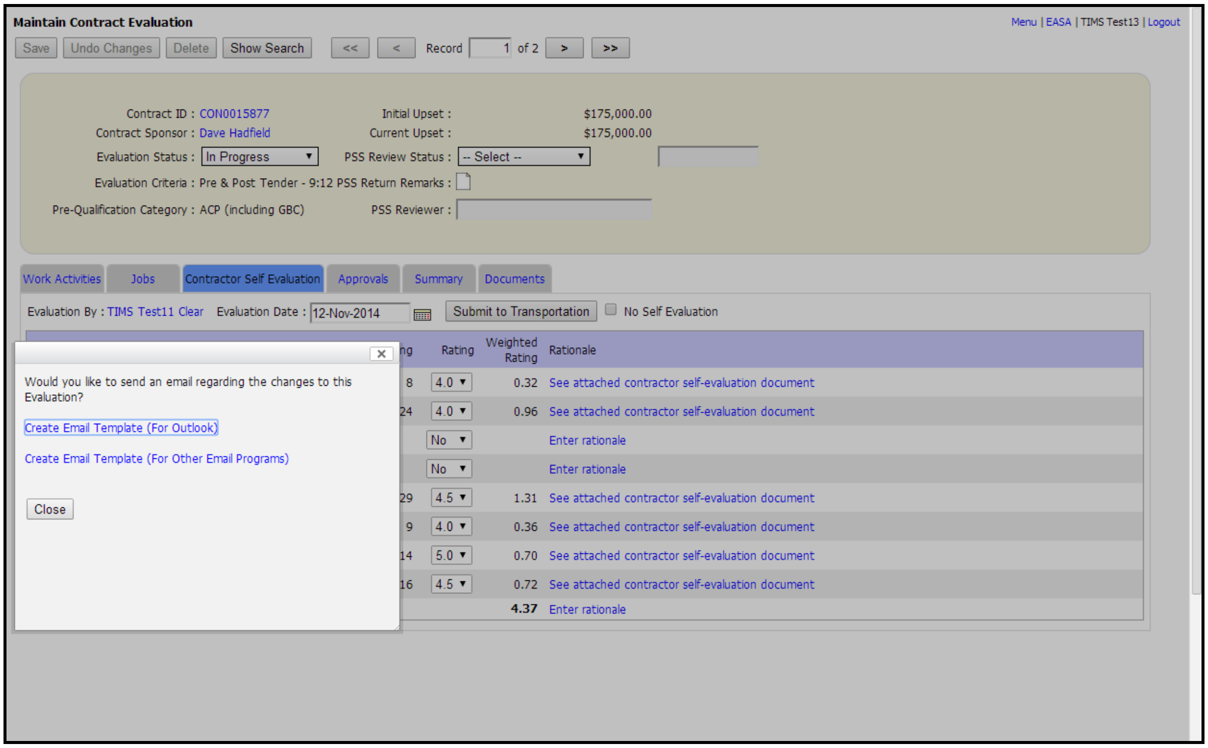
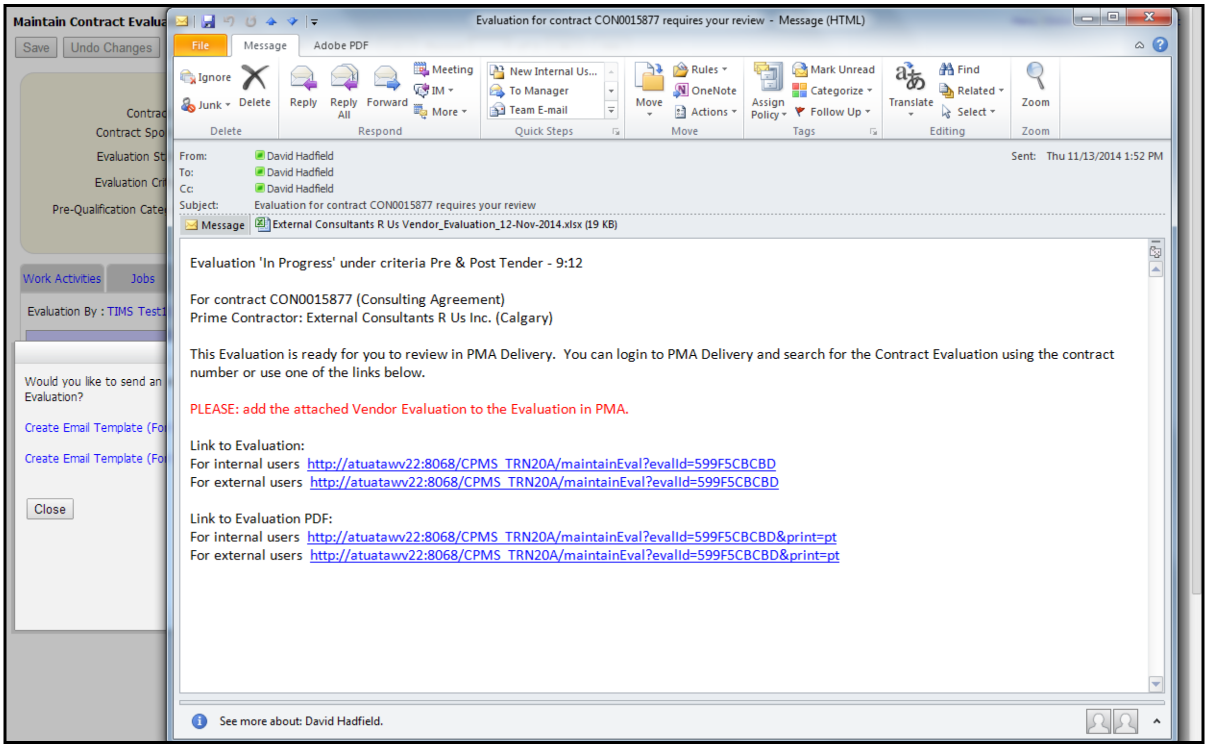
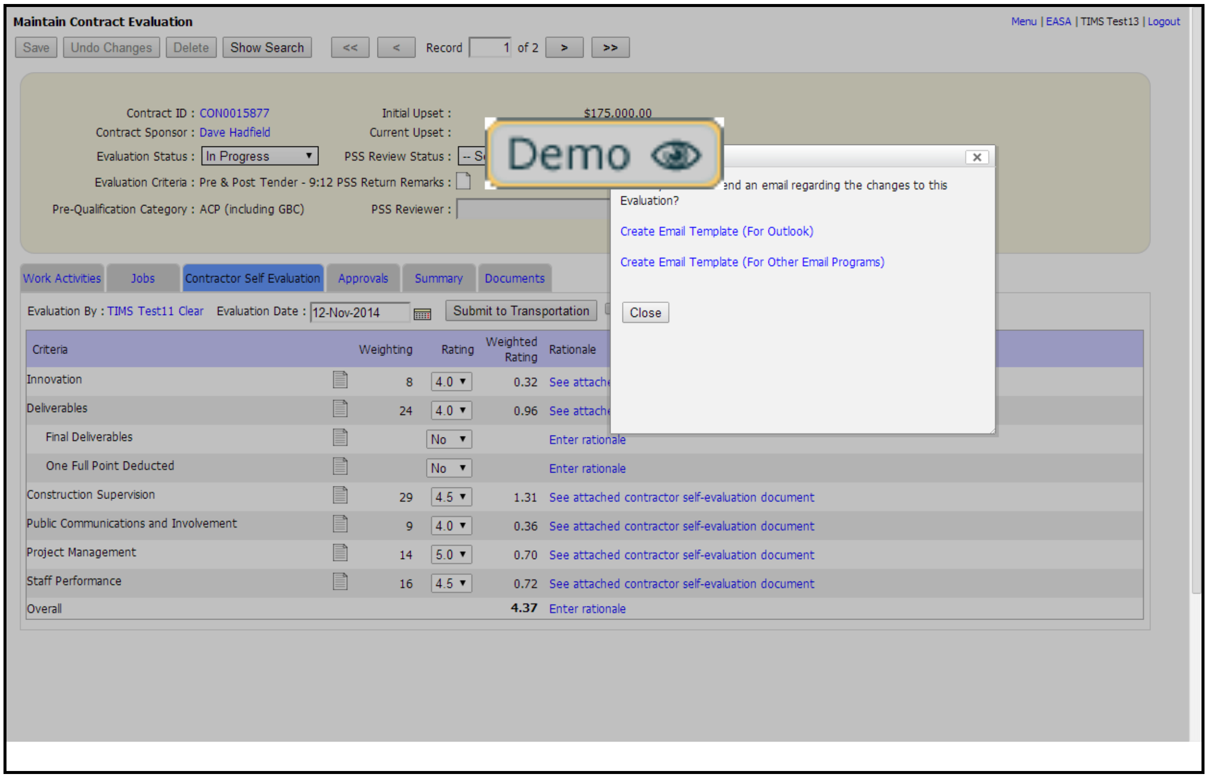


Figure 21.17 below shows an example of an email with the Vendor Self Evaluation form attached and additional text added to reference the attachment.

Figure 21.17 Email to Project Admin and Contract Sponsor



Demo 21.2 Submit a Contract Evaluation



How To

1. From the *Maintain Contract Evaluation* screen under the *Contractor Self Evaluation* tab, click the **Submit to Transportation** button.
2. In the *Email* dialog box, click the link for the Email application used in the company (e.g. **Create Email Template (For Outlook)**.
3. Edit the recipients of the email as necessary (optional).
4. Add text to the body of the email as necessary.
5. Attach the **Vendor Self Evaluation** form.
6. Click the **Send** button.
7. In the *Email* dialog box, click the **Close** button.

Submit to Contract Sponsor (Project Admin)

When the Evaluation is Submitted to the Contract Sponsor by the Transportation Project Administrator, the status of the evaluation will change to Submitted. With a Submitted status, the Consultant can view the Departments' Evaluation ratings and rationale but can no longer edit the Contractor Self Evaluation tab.

Hint: The Contractor may generate the Vendor Self Evaluation form themselves by selecting the Print Form button on the Contractor Self Evaluation tab.

Figure 21.18 Department Evaluation - Submitted to Contract Sponsor

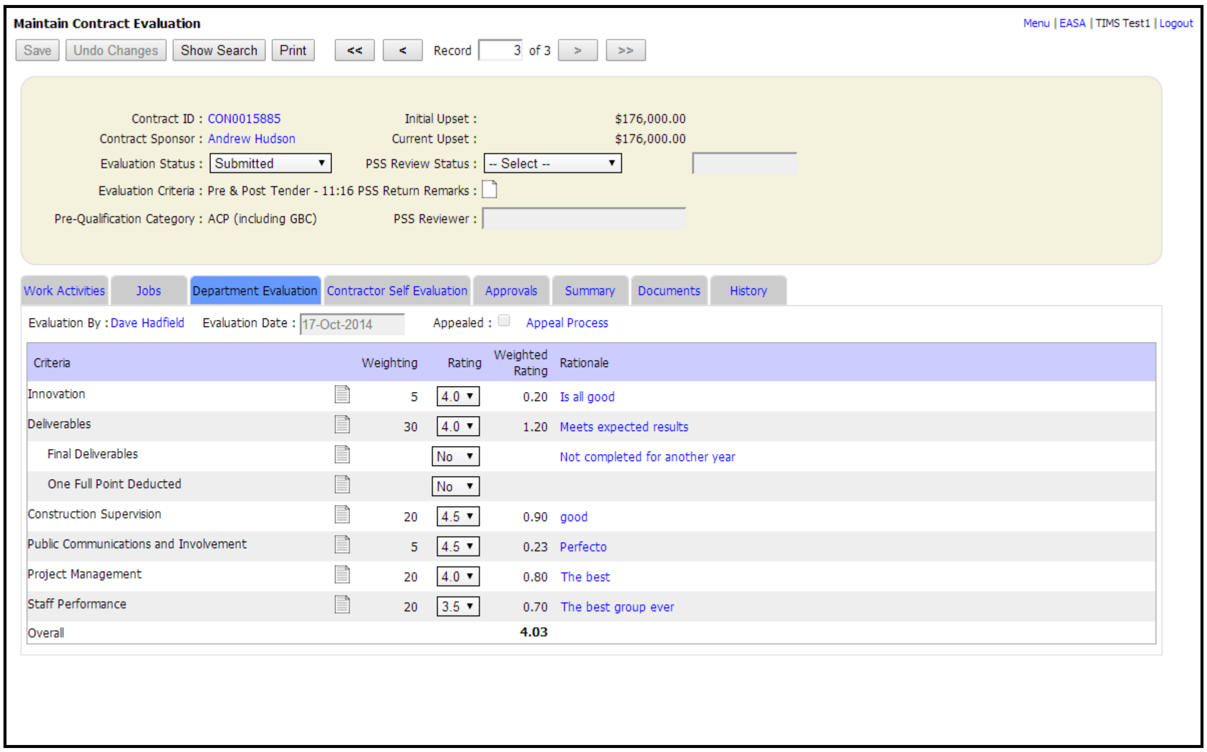
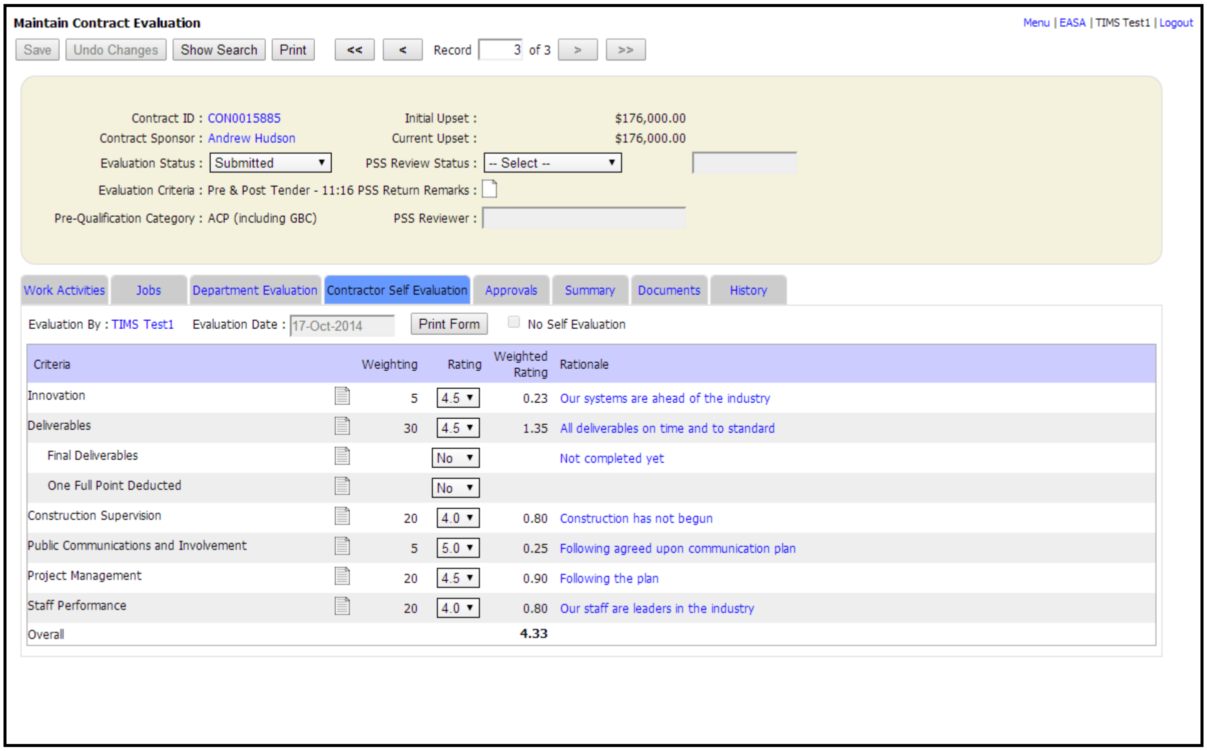


Figure 21.19 Contractor Self Evaluation - Submitted to Contract Sponsor



Hint: The Print Form button becomes available to the Contractor after the Evaluation has a status of Submitted.

Contract Sponsor Review

When the Project Administrator submits the Contract Evaluation an email is generated. The email is automatically addressed to the Contract Sponsor and contains a link to automatically take the Contract Sponsor to the appropriate Contract Evaluation. The Contract Sponsor performs a review of the evaluation.

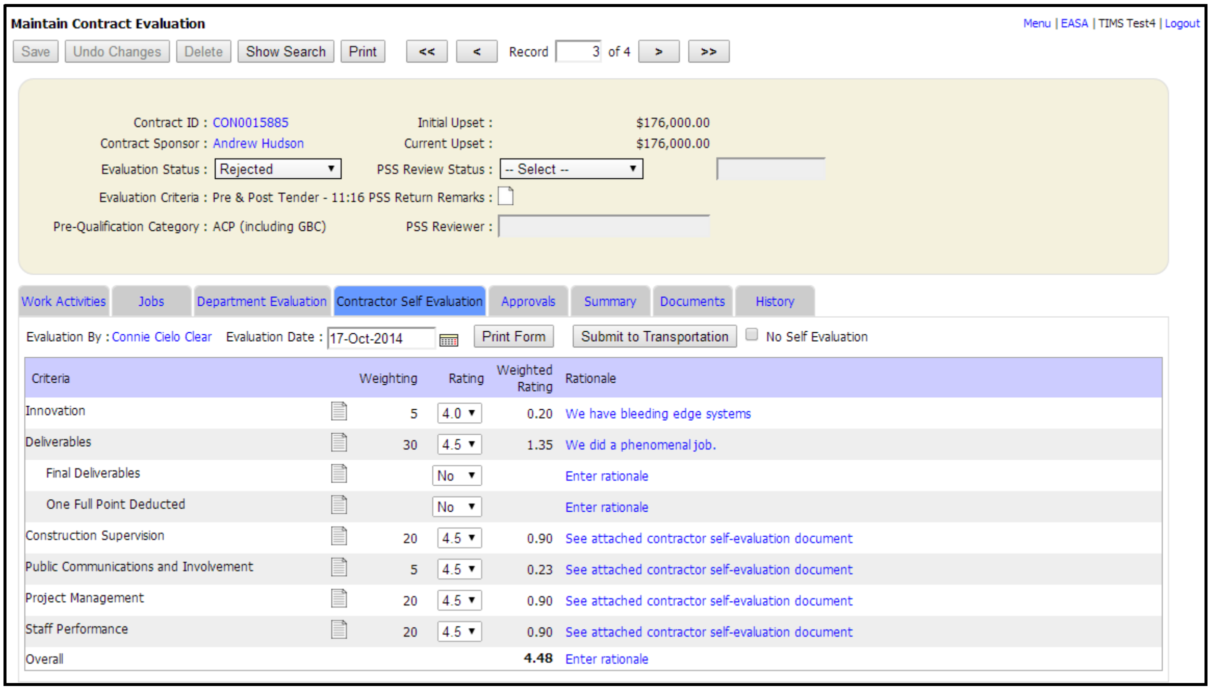
1. Contract Sponsor receives email notification of submitted evaluation
2. Contract Sponsor reviews the evaluation
   a) If the Sponsor is satisfied with the evaluation:
      - on the Consultant Self Evaluation tab the 'No Self Evaluation' is unchecked
      - the Self Evaluation spreadsheet is generated and sent to the consultant

   b) If Sponsor selects Reject
      - an Email (with links to the evaluation) is generated to notify the Project Administrator (Evaluation By) of the rejection
      - Evaluation Status set to Rejected
3. Consultant completes Self Evaluation and emails back to Project Administrator

Hint: The Contract Sponsor determines if a Vendor Self Evaluation is warranted or not.

Figure 21.20 below shows the buttons and check boxes available to the Contractor on a Rejected Evaluation. The Print Form, Submit to Transportation and No Self Evaluation functions are all available.

Figure 21.20 Contractor Self Evaluation - Rejected by Contract Sponsor


Maintain Contract Evaluation
Menu | EASA | TIMS Test4 | Logout
Save | Undo Changes | Delete | Show Search | Print | << | < | Record 3 of 4 | > | >>

Contract ID : CON0015885 Initial Upset : $176,000.00
Contract Sponsor : Andrew Hudson Current Upset : $176,000.00
Evaluation Status : Rejected PSS Review Status : -- Select --
Evaluation Criteria : Pre & Post Tender - 11:16 PSS Return Remarks :
Pre-Qualification Category : ACP (including GBC) PSS Reviewer :

Work Activities | Jobs | Department Evaluation | Contractor Self Evaluation | Approvals | Summary | Documents | History

Evaluation By : Connie Cielo Clear Evaluation Date : 17-Oct-2014 Print Form | Submit to Transportation | No Self Evaluation

Criteria	Weighting	Rating	Weighted Rating	Rationale
Innovation	5	4.0	0.20	We have bleeding edge systems
Deliverables	30	4.5	1.35	We did a phenomenal job.
Final Deliverables		No		Enter rationale
One Full Point Deducted		No		Enter rationale
Construction Supervision	20	4.5	0.90	See attached contractor self-evaluation document
Public Communications and Involvement	5	4.5	0.23	See attached contractor self-evaluation document
Project Management	20	4.5	0.90	See attached contractor self-evaluation document
Staff Performance	20	4.5	0.90	See attached contractor self-evaluation document
Overall			4.48	Enter rationale

Submitted Evaluation Email

The email sent to the Contract Sponsor has information about which Contract is involved in the evaluation, when the evaluation took place, who the Contractor on the contract is, etc. The Email also contains two links: one that displays the Contract Evaluation as a PDF, and the other that hyperlinks the Contract Sponsor into PMA Delivery and onto the Maintain Contract Evaluation screen with the evaluation displayed.

Hint: If you are not logged into PMA Delivery when you click the hyperlink, you will need to login before access to the evaluation is permitted.

Evaluation PDF & Print Button

In the Evaluation Email is a link called: 'Link to Evaluation PDF'. Clicking this link will display the Contract Evaluation as a PDF. The file is at least two pages long (depending on the size of the Rationale fields it could be more). On the Maintain Contract Evaluation screen is a Print button. Clicking this button accomplishes the same thing as clicking the link.

Figure 21.21 Maintain Contract Evaluation screen - Print button

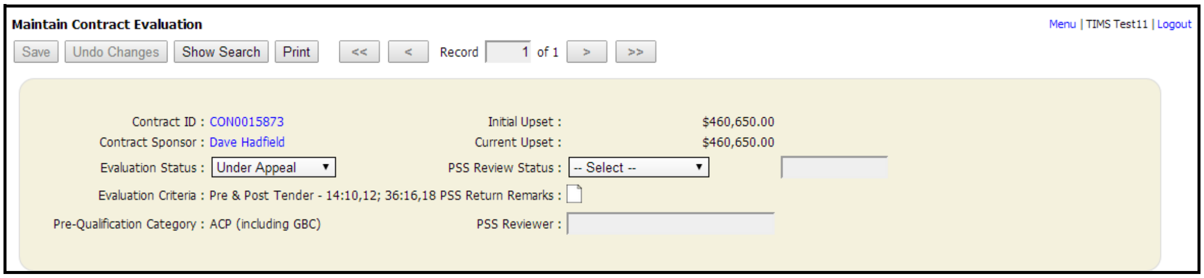
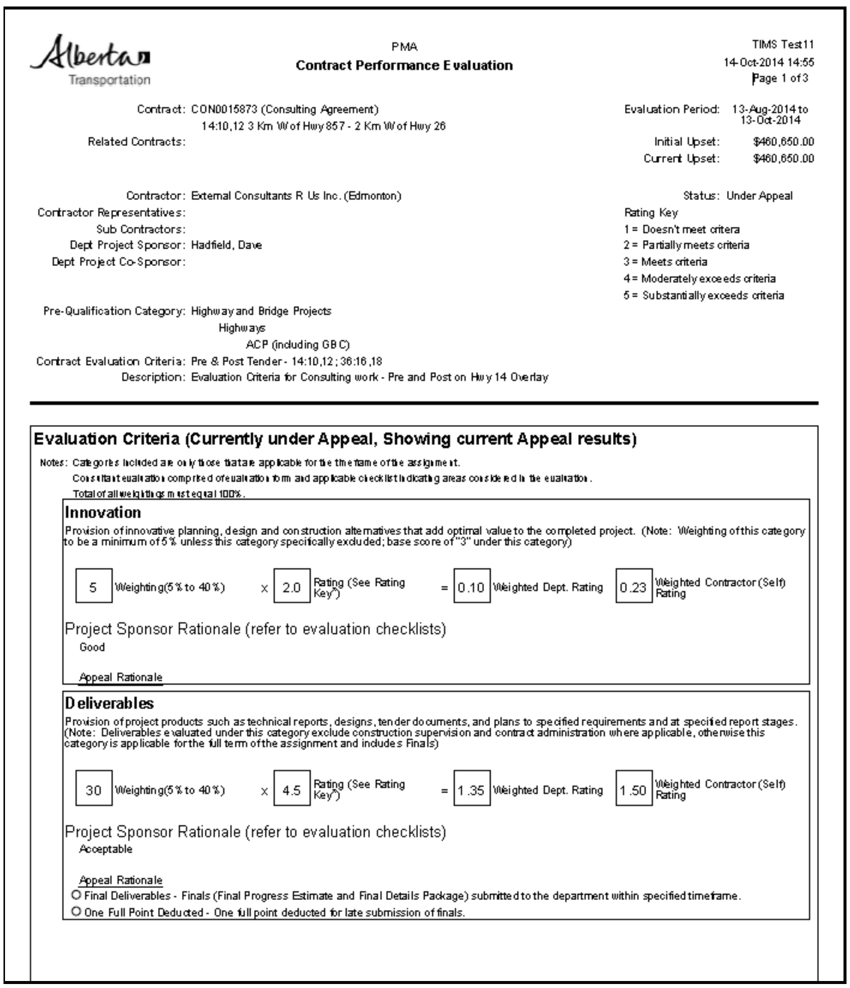


Figure 21.22 Evaluation PDF example



Alberta Transportation

PMA
Contract Performance Evaluation

TIMS Test11
14-Oct-2014 14:55
Page 1 of 3

Contract: CON0015873 (Consulting Agreement)
14:10,12 3 Km W of Hwy 857 - 2 Km W of Hwy 26
Related Contracts:

Evaluation Period: 13-Aug-2014 to 13-Oct-2014
Initial Upset: $460,650.00
Current Upset: $460,650.00

Contractor: External Consultants R Us Inc. (Edmonton)
Contractor Representatives:
Sub Contractors:
Dept Project Sponsor: Hadfield, Dave
Dept Project Co-Sponsor:

Status: Under Appeal
Rating Key
1 = Doesn't meet critera
2 = Partially meets criteria
3 = Meets criteria
4 = Moderately exceeds criteria
5 = Substantially exceeds criteria

Pre-Qualification Category: Highway and Bridge Projects
Highways
ACP (including GBC)
Contract Evaluation Criteria: Pre & Post Tender - 14:10,12 ; 36:16,18
Description: Evaluation Criteria for Consulting work - Pre and Post on Hwy 14 Overlay

Evaluation Criteria (Currently under Appeal, Showing current Appeal results)

Notes: Categories included are only those that are applicable for the time frame of the assignment.
Consultant evaluation comprised of evaluation form and applicable checklist indicating areas considered in the evaluation.
Total of all weightings must equal 100%.

Innovation

Provision of innovative planning, design and construction alternatives that add optimal value to the completed project. (Note: Weighting of this category to be a minimum of 5% unless this category specifically excluded; base score of "3" under this category)

5 Weighting(5% to 40%) x 2.0 Rating (See Rating Key") = 0.10 Weighted Dept. Rating 0.23 Weighted Contractor (Self) Rating

Project Sponsor Rationale (refer to evaluation checklists)
Good

Appeal Rationale

Deliverables

Provision of project products such as technical reports, designs, tender documents, and plans to specified requirements and at specified report stages. (Note: Deliverables evaluated under this category exclude construction supervision and contract administration where applicable, otherwise this category is applicable for the full term of the assignment and includes Finals)

30 Weighting(5% to 40%) x 4.5 Rating (See Rating Key") = 1.35 Weighted Dept. Rating 1.50 Weighted Contractor (Self) Rating

Project Sponsor Rationale (refer to evaluation checklists)
Acceptable

Appeal Rationale
○ Final Deliverables - Finals (Final Progress Estimate and Final Details Package) submitted to the department within specified timeframe.
○ One Full Point Deducted - One full point deducted for late submission of finals.

Contract Evaluation Approval

Once the Submit to Transportation email is received by the Project Administrator and Contract Sponsor from the contractor, the steps to follow are listed below. Whether the Contractor Evaluation agrees with the Department Evaluation or not, the Contract Evaluation will end up with a status of Completed. The appeal process can begin immediately after if necessary.

1. Project Administrator receives email with regarding Contractor Self Evaluation tab completion.
2. Project Administrator completes the Department Evaluation tab and attaches any supporting files to Documents tab.
3. Project Administrator Submits the Evaluation to the Contract Sponsor.
4. The Contract Sponsor compares the Department Evaluation to the Contractor Self Evaluation using the Summary tab.
   a) If Consultant does not accept/match Department Evaluation:
      - Meeting arranged with Project Administrator, Contractor and Contract Sponsor.
      - Changes to Department Evaluation may or may not be made following the meeting.
      - Continue to step 4 b). Consultant has option of Appealing.

   b) Contract Sponsor Approves the Evaluation.
   c) Evaluation Status set to Completed.
   d) PSS Review Status set to Submitted.
   e) Final Evaluation printed as PDF and copy sent to Consultant.

Alert! Whether the evaluation is appealed or not, the Evaluation Status is set to Approved by the Contract Sponsor.

Contract Sponsor Approval

Whether the Department Evaluation is accepted by the contractor or not, the evaluation is approved by the Contract Sponsor. The next step depends on the contractor. The evaluation can be accepted or appealed. If the evaluation is accepted, the PSS Review is conducted. If the evaluation is not accepted, the appeal to the Regional Director is the next step.

Appeal to Regional Director Process

The Appeal process is initiated by the consultant. A letter is written by the consultant and sent to the AT Regional Director. When the letter is received, the contract evaluations' status is set to 'Under Appeal' and the PSS Review status of 'Submitted' becomes blank. A new tab appears on the Maintain Contract Evaluation screen: "Appeal Evaluation".

1. Consultant receives Final copy of Evaluation.
2. Consultant submits a letter of appeal via email or mail to the Regional Director with copies to the Contract Sponsor and the Director of Professional Services Section.
3. Contract Sponsor notifies Project Administrator of the appeal.
4. Project Administrator sets Evaluation Status to Under Appeal. PSS Review Status automatically set to Blank.
5. Project Administrator adds Regional Director to Approvals tab.
6. Regional Director reviews the evaluation
   a) If the Director Accepts the Appeal:
      - Appeal Ratings and Rationale are entered
      - Evaluation Status set to Appeal Accepted
   b) If Director Rejects the Appeal
      - Rationale for rejecting is updated
      - Evaluation Status set to Appeal Rejected
7. Regional Director communicates the Appeal decision to Consultant
8. Copies of all documents and correspondence are attached to the Contract Evaluation on the Documents tab.

Alert!	The consultant has two weeks from the time they receive the Final Evaluation PDF to submit an Appeal to the AT Regional Director.

Alert!	The appeal decision should be communicated to the consultant within two weeks of receiving the appeal.

Hint:	In the Maintain Contract Evaluation screen, on the Department Evaluation tab is a link 'Appeal Process' that will open a two page document covering the appeal process.

Appeal to Executive Director Process

If the Consultant receives a communication from the Regional Director with the decision being Appeal Rejected, the consultant has the choice of escalating the Appeal to the AT Executive Director. The Appeal process is initiated by the consultant. A letter is written by the consultant and sent to the Executive Director with a copy sent to the Regional Director, the Contract Sponsor and the Director of Professional Services Section. When the letter is received, the executive director is added to the contract evaluations' approvals tab.

1. Consultant receives Appeal Rejected Decision from Regional Director.
2. Consultant submits a letter of appeal via email or mail to the Executive Director with a copy to the Regional Director, the Contract Sponsor and the Director of Professional Services Section.
3. Regional Director adds the Executive Director to the Approvals tab.
4. Regional Director updates their Recommended Action from 'Reject Appeal' to 'Recommend Reject Appeal' or 'Recommend Accept Appeal'.
5. Executive Director reviews the evaluation
   a) If the Director Accepts the Appeal:
      - Appeal Ratings and Rationale are updated
      - Evaluation Status set to Appeal Accepted
   b) If Director Rejects the Appeal
      - Rationale for rejecting is updated
      - Evaluation Status set to Appeal Rejected
6. Executive Director communicates the Appeal decision to Consultant.
7. Copies of all documents and correspondence are attached to the Contract Evaluation on the Documents tab.

Alert!	The consultant has two weeks from the time they receive the Final Evaluation PDF to submit an Appeal to the AT Executive Director.

Alert!	The appeal decision should be communicated to the consultant within two weeks of receiving the appeal.

Hint:	In the Maintain Contract Evaluation screen, on the Department Evaluation tab is a link 'Appeal Process' that will open a two page document covering the appeal process.

Chapter 22: Maintain Change Request Screen

This module is intended to provide information about the Maintain Change Request screen and the various tabs available on the screen.

Topics in Chapter:

1. Maintain Contract Screen – Change Request Tab
2. Maintain Change Request Screen
3. Background Tab
4. Costs Tab
5. WA Limits Tab
6. Milestones Tab
7. Duration Days Tab
8. Fee Summary Tab
9. Approvals Tab
10. Distribution List Tab
11. Documents Tab
12. Related CRs Tab
13. History Tab

Maintain Contract Screen – Change Requests Tab

The first screen to be defined is the Contract screen. The ability to access, for review or to create a new change request, begins on the Maintain Contract screen.

Figure 22.1 Consulting Contract –Change Requests tab

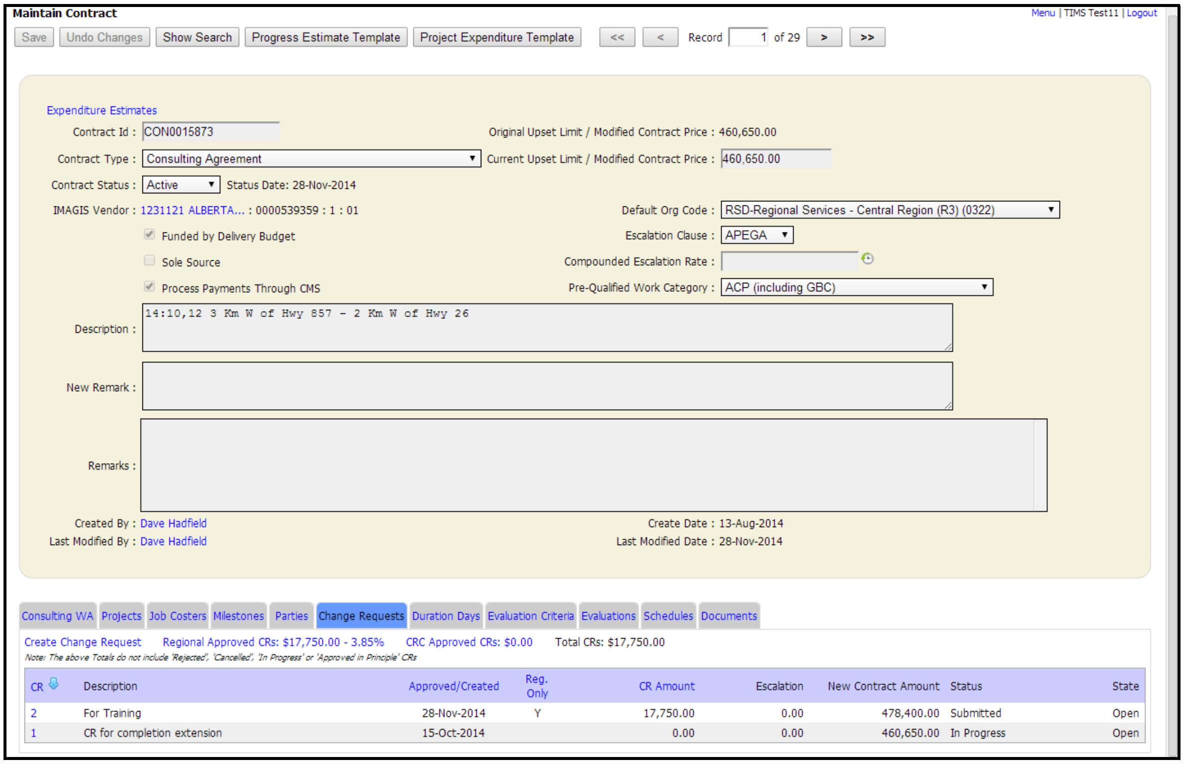


Table 22.1 Maintain Contract screen - Change Requests tab

Link/Column	Definition
Create Change Request	A link that allows users to create new change requests for the contract.
Regional Approved CRs	Total value (in dollars and as a percentage) of all Regionally approved CRs. Clicking this link will list only the Regional CRs.
CRC Approved CRs	Total value (in dollars) of all CRC approved CRs. Clicking this link will list only the CRC CRs.
Total CRs	Total value (in dollars) of all approved CRs. Clicking this link will list All CRs.
CR	The Change Request Number (i.e. 1, 2, 3). Change Request Numbers are sequential and specific to the contract.
Description	Free form text describing the issue (reason/purpose) driving the change request.
Date	Date the Change Request was originally created (saved), or the date it became ‘Approved’ or ‘Approved in Principle’.

Table 22.1 Maintain Contract screen - Change Requests tab

Link/Column	Definition
Reg. Only	A flag (y/n) indicating if the change request requires only Regional approval or not.
CR Amount	Total value (in dollars) of the CR regardless of status and including any escalation amount.
Escalation	Total value (in dollars) for the escalation amount of the change request (consulting contract only).
New Contract Amount	The new amount of the contract (in dollars) based on the change request regardless of the CRs' Status.
Status	The status of the change request: In Progress, Cancelled, Submitted, Approved, Approved in Principle, Rejected.
State	Change Requests are either Open or Closed. CRs are automatically closed when the status becomes Approved or Approved in Principle.

Hint: Clicking any blue column heading will sort the CRs by the column values.

Maintain Change Request Screen

New change requests are automatically pre-populated with information from the contract. This includes:

- Current Contract Costs
- Work Activities and Job Costers
- Milestone Dates that require a CR to be changed
- Duration Days (consulting agreements)

When a change request is saved for the first time, the next (sequential) number within the contract is assigned to the CR. A ‘snapshot’ of the contract and change request data is captured. As you will learn later, when a Change Request is Approved in PMA the Contract dollars and dates will be updated. However, a change request can be unapproved in CMS. For this reason, PMA needs a snapshot of how the contract looked prior to the change request and the changes brought about by the change request, so that the contract can be properly reset. This is more complicated than it sounds due to the fact that multiple change requests can be in progress at the same time.

Alert! A Change Request is a ‘request’. None of the changes identified on the CR are actually implemented until it is Approved.

Figure 22.2 New Consulting Change Request – blank

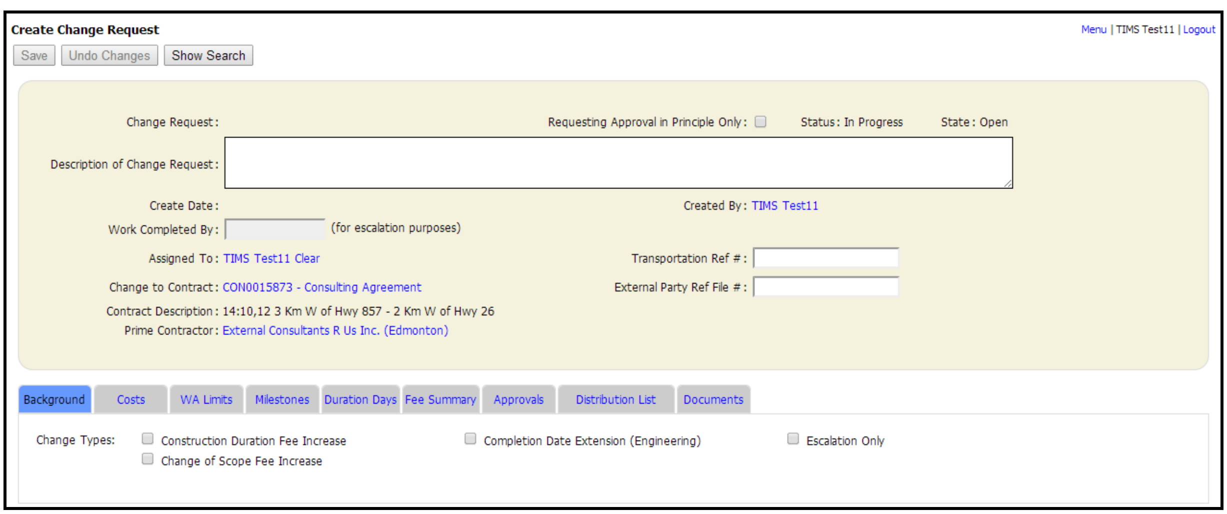


Figure 22.3 New Consulting Change Request - Background example

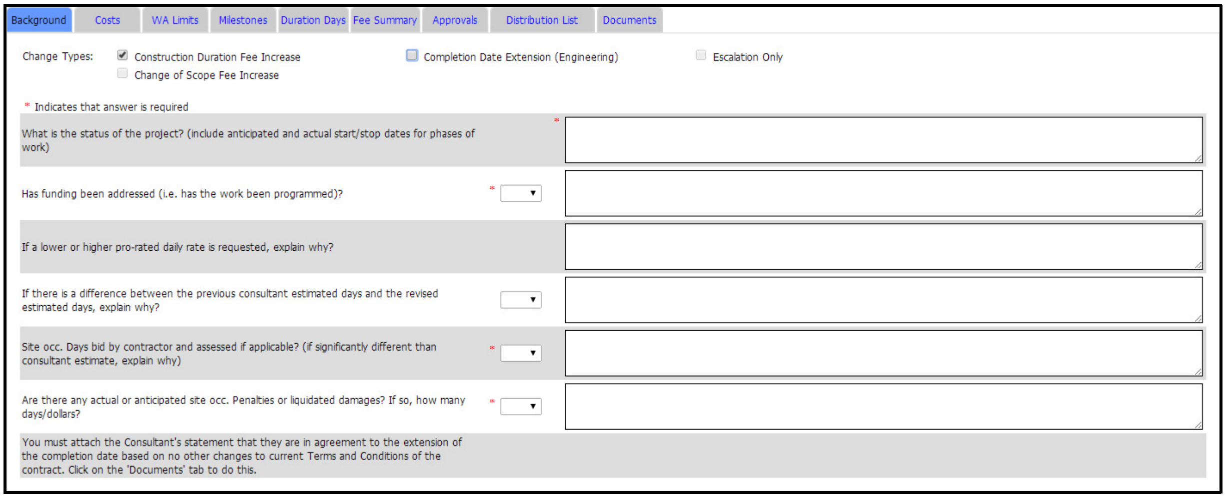


Figure 22.4 Maintain Change Request screen

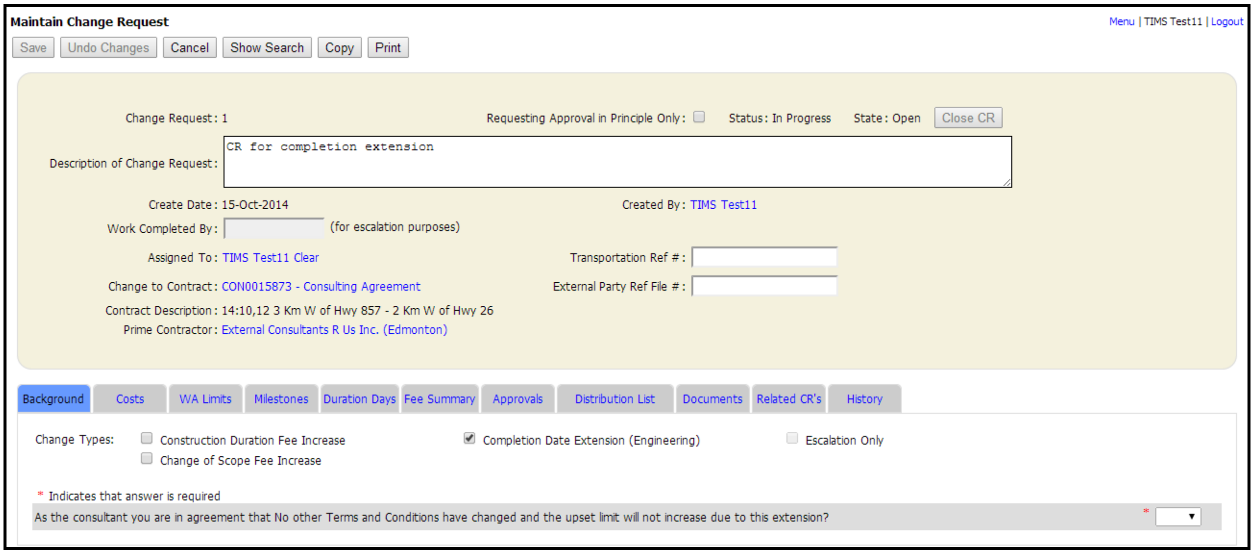


Table 22.2 Change Request screen - General Information

Field	Description
Change Request	The number assigned to the change request when initially saved.
Requesting Approval in Principle Only	Check box (y/n) indicating if the Change Request is seeking approval or approval in principle.
Status	Current Status of the Change Request: In Progress, Cancelled, Submitted, Approved, Approved in Principle, Rejected.
State	Current state of the Change Request: either Open or Closed. CRs are automatically closed when the status becomes Approved or Approved in Principle.
Description of Change Request	Free form text field used in describing the Issue (reason/purpose) driving the Change Request.
Create Date	Date the Change Request was originally created (saved), or the date it became 'Approved' or 'Approved in Principle'.
Created By	The name of the user who originally created the Change Request.
Work Completed By	<u>This field is used by PSS Consulting users only</u>. Used to indicate that the work was completed at a date different than the CR being entered into PMA Delivery. Typically used if the work was completed in one calendar year but the CR is approved in another year (December/January). Thereby affecting the Escalation rate to be applied.
Assigned To	The user who is responsible for the next action taken on the Change Request. Assigned To defaults to the person creating the CR. When the CR is submitted, the 'Assigned To' changes to the first person on the Approvals tab. The Assigned To can be manually overwritten. This allows the change request to be assigned to a person NOT on the Approvals tab.

Table 22.2 Change Request screen - General Information

Field	Description
Transportation Ref #	Available to AT staff if a separate numbering scheme is required.
Change to Contract	Displays the Contract Number that the Change Request is associated with. The Contract Type is also displayed.
External Party Ref #	Available to external users who want to use if a different reference numbering scheme is required.
Contract Description	Displays the contract description from the Maintain Contract screen.
Prime Contractor	Displays the name of the Prime Contractor from the Parties tab of the Maintain Contract screen.

Action Types

At the moment in time when the Change Request is first created (saved), data from the Contract is loaded into the Change Request. When changes are made to this data (for the most part), a colour scheme is used to represent the changes that have been made in the change request.

The last column on several of the Tabs (i.e. Costs, WA Limits, Milestones, and Duration Days) indicates in coloured text, what types of action have been taken.

Figure 22.5 Colour Code example – Change, Add, Remove

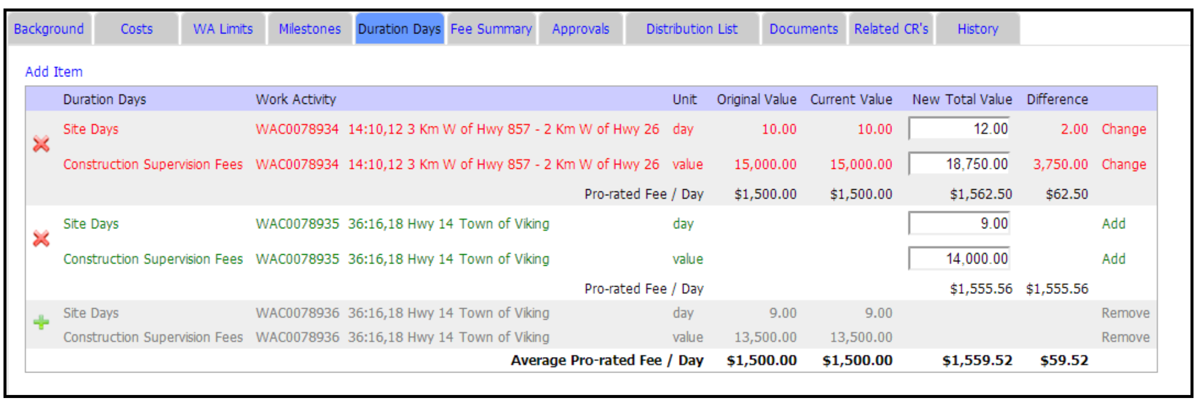


Table 22.3 Action Types

Action Types	Description
Add	Text is coloured green
Remove	Text is coloured grey
Change	Text is coloured burgundy
No Change	Text is coloured black

Hint: Colours take effect after saving the changes.

Dollar Amount Entry

When entering a dollar value in any of the change request fields:

- Do not enter dollar signs ($1000)
- Do not enter commas (1,000)
- Do enter decimals (1000.95) to separate dollars from cents.
- Do enter a minus (-1000) to indicate a negative (penalty) value

Background Tab

The Background tab is used to identify the Change Request Type(s). Each CR Type has a check box. Selecting a CR Type will display relevant questions. Questions identified with an asterisk (*) must be answered.

The Change Request Types available are derived by the Contract Type. Consulting Contracts have one group of CR Types. Other Contract Types have another group of CR Types. As an external user you will only be able to create change requests for your company's consulting contracts.

Multiple CR Types can be selected. When trying to select multiple Change Types on the Background tab, data validations have been created so that only compatible change types can be selected. As the first Change Type is checked, only compatible Change Types remain available for selection.

Alert!	At least one Change Type must be selected in order to generate/save a Change Request.

Alert!	All questions having an asterisk (*) must be answered.

Consulting Contract Change Request Types

Construction Duration Fee Increase: *After answering the questions on the Background Tab, the Duration Days Tab is used to complete what was referred to as the 'table', where the number of days needs to be revised from the current.*

Change of Scope Fee Increase: *After answering the questions on the Background Tab, the Costs Tab would be predominantly used to change the scope of work. The Costs Tab allows you to add or remove work activities or job costers and enter the annual costs for each.*

Contract Date Extension: *Used when there has been no change in the amount of work to be done but for unforeseen reasons, the work will not be completed on time (i.e. as originally planned). The Milestones Tab would allow you to enter the new expected completion dates. Certain Milestones can only be changed through a Change Request (e.g. Contract Invoicing Completion / End Date). The Milestones Tab automatically lists the Contract's Milestones that meet this criterion.*

Escalation Only: *For PSS Consulting Use Only!*

Alert!	Escalation Only is only used by Alberta Transportation - Professional Services, Consulting.

Figure 22.6 Background Tab - Construction Duration Fee Increase example

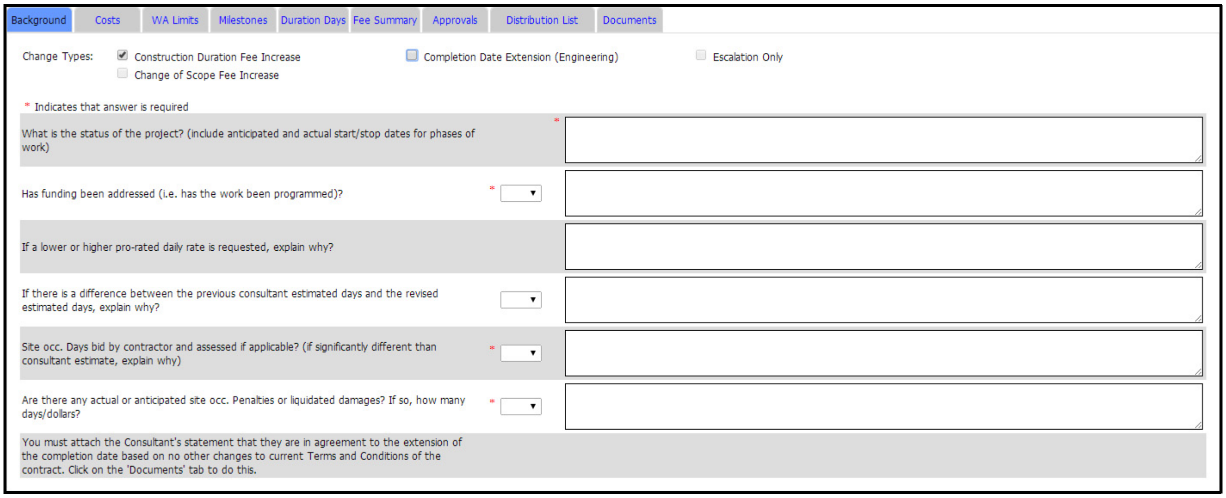


Figure 22.7 Background Tab - Change Scope Fee Increase example

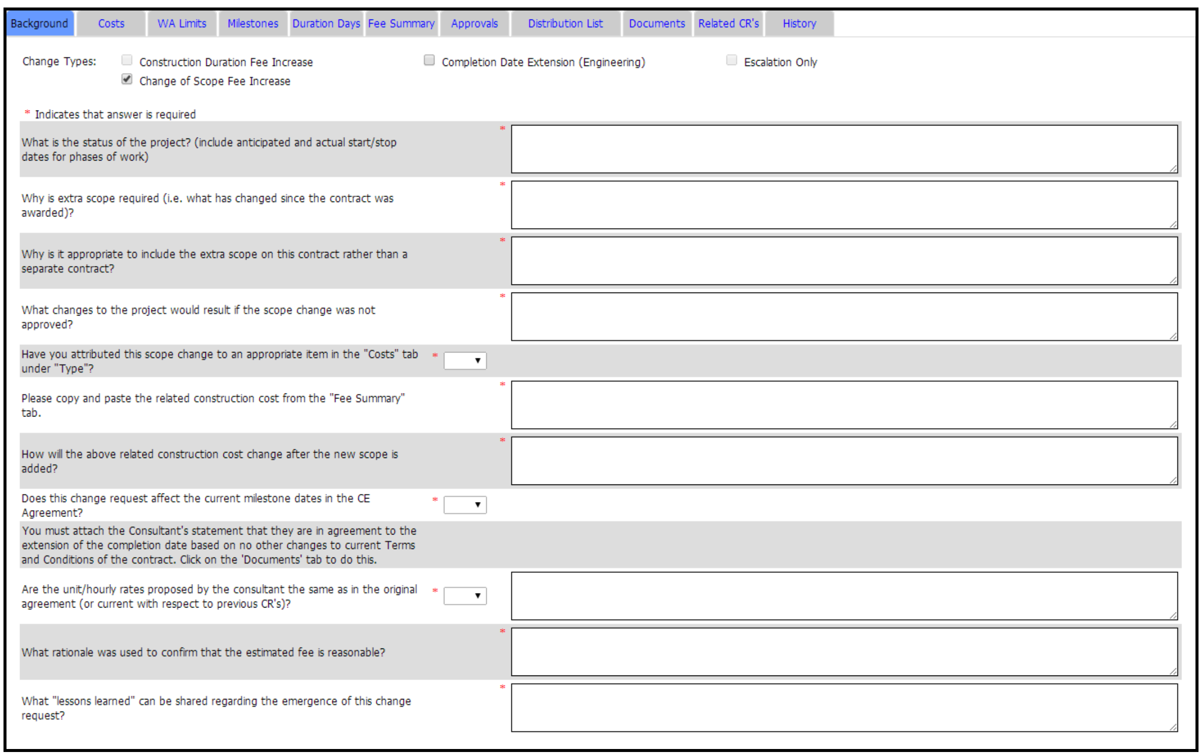
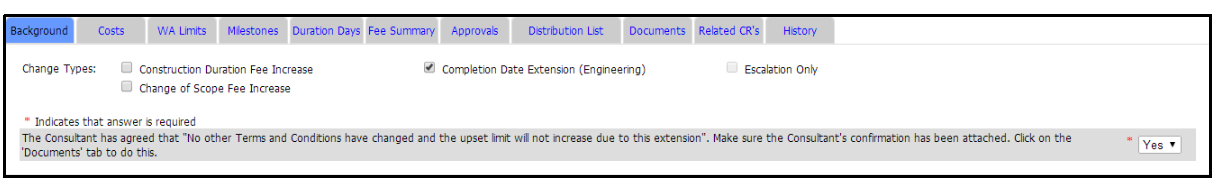


Figure 22.8 Background Tab - Contract Extension example



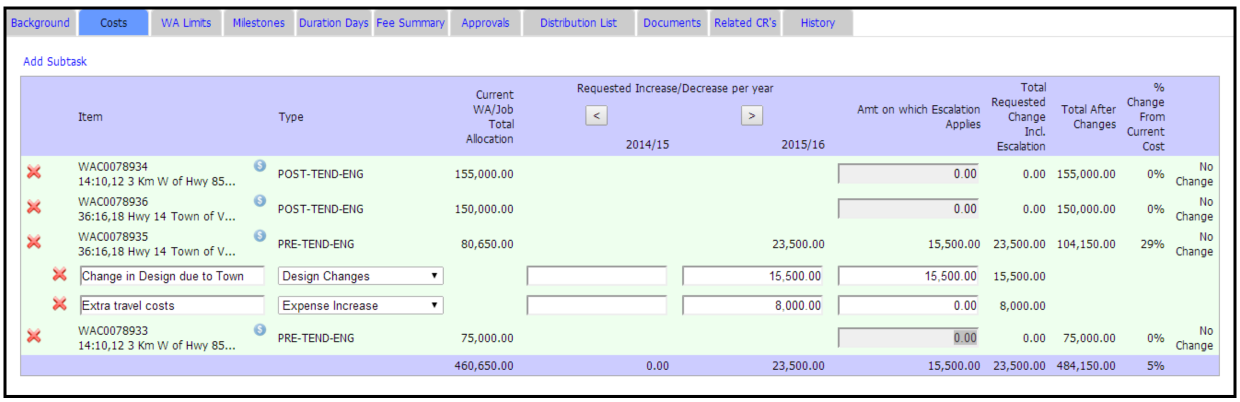
Costs Tab

The Costs tab is used to enter the dollar amount of the increase or decrease requested on the CR. The tab uses Subtasks to facilitate these changes. Subtasks are added to existing work activities allowing the external users to change the scope. There is a drop down list of Subtasks available to help categorize the reason for the change.

At the point in time when a change request is created, any Work Activities or Job Costers that are part of the contract, become data in the change request and are therefore listed on the Costs Tab.

Alert! Removing work activities on the Costs tab will also be reflected on the WA Limits tab and the Duration Days tab.

Figure 22.9 Costs tab – consulting agreement example



Item	Type	Current WA/Job Total Allocation	Requested Increase/Decrease per year 2014/15	2015/16	Amt on which Escalation Applies	Total Requested Change Incl. Escalation	Total After Changes	% Change From Current Cost	
WAC0078934 14:10,12 3 Km W of Hwy 85...	POST-TEND-ENG	155,000.00			0.00	0.00	155,000.00	0%	No Change
WAC0078936 36:16,18 Hwy 14 Town of V...	POST-TEND-ENG	150,000.00			0.00	0.00	150,000.00	0%	No Change
WAC0078935 36:16,18 Hwy 14 Town of V...	PRE-TEND-ENG	80,650.00		23,500.00	15,500.00	23,500.00	104,150.00	29%	No Change
Change in Design due to Town	Design Changes			15,500.00	15,500.00	15,500.00			
Extra travel costs	Expense Increase			8,000.00	0.00	8,000.00			
WAC0078933 14:10,12 3 Km W of Hwy 85...	PRE-TEND-ENG	75,000.00			0.00	0.00	75,000.00	0%	No Change
		460,650.00	0.00	23,500.00	15,500.00	23,500.00	484,150.00	5%	

As long as the State of the CR is 'Open", the following actions can be performed:

- Remove Work Activity/Job Coster
- Add sub-tasks to Work Activity/Job Coster
- Remove sub-tasks from Work Activity/Job Coster

Hint: Amounts can be reduced by using a dash to indicate a negative value (e.g. -1200).

Consulting Contract: Costs Tab

The Costs tab has one link that allows the user to increase or decrease the dollar amount of an existing work activity or job coster. Subtasks are inserted below the impacted work activity. SubTasks are added to the affected item(s) to provide an adequate level of detail for the change being requested.

Figure 22.10 Costs tab – consulting agreement example

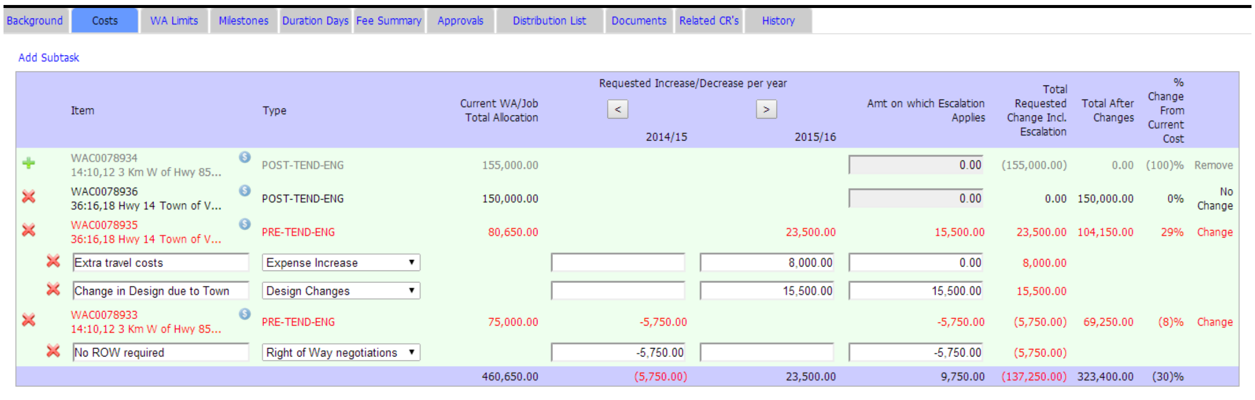


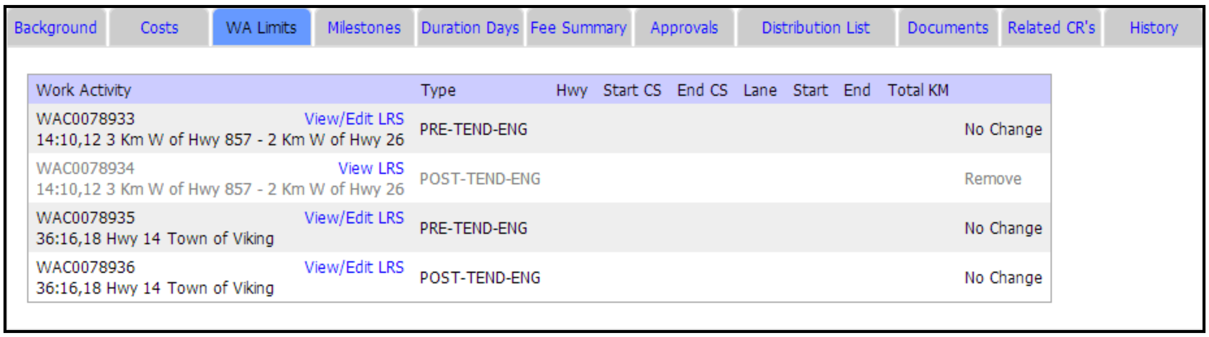
Table 22.4 Add Cost Items - Consulting Contract

Link	Description
Remove Row	Allows the user to identify a work activity to be removed from the contract. The Remove button is replaced with a Re-Add Row buttons.
Re add Row	Allows the user to un-remove a work activity. The opposite of the Remove Row button.
Add Subtask	Allows the user to enter changes to existing work activities or job costers. The Type column drop down allows the user to be more specific on what type of work requires the change.

WA Limits Tab

The Work Activity Limits tab allows the user to view the LRS limits of the work activities for the change request. Any work activities not involving a road will not have an LRS value (e.g. pre-tender engineering, post tender engineering). Any work activities added/ changed/removed on the Costs tab are displayed on the WA Limits tab (see Figure 22.11 below).

Figure 22.11 Work Activity Limits Tab



Hint: As external users can only create CRs for Consulting Contracts, there are no LRS values for engineering type work activities.

Figure 22.12 Work Activity Limits Tab - View LRS

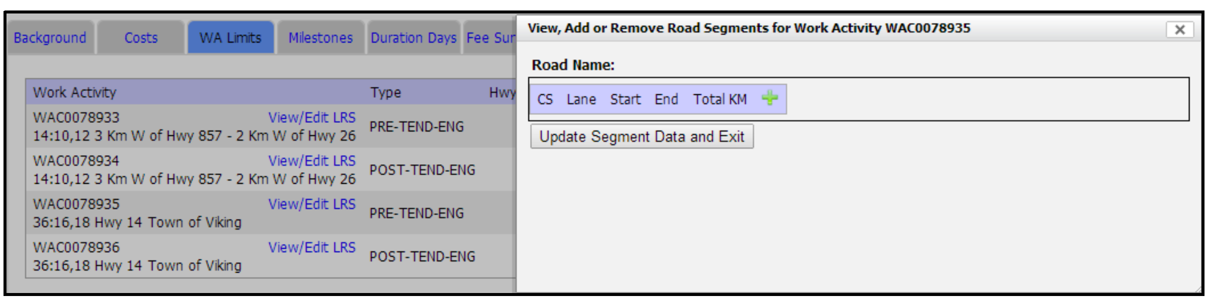


Table 22.5 WA Limits tab - links

Link	Description
View/Edit LRS	Allows the external user to view LRS values. Engineering work activities do not have an LRS value.

Milestones Tab

The Milestones tab allows you to identify changes to contract milestone dates. The active milestone dates that are part of the contract (and can only be changed by a change request) are automatically listed.

Figure 22.13 Milestones Tab

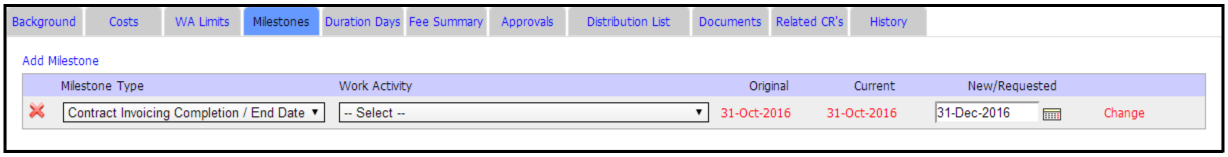


Table 22.6 Milestones tab - fields

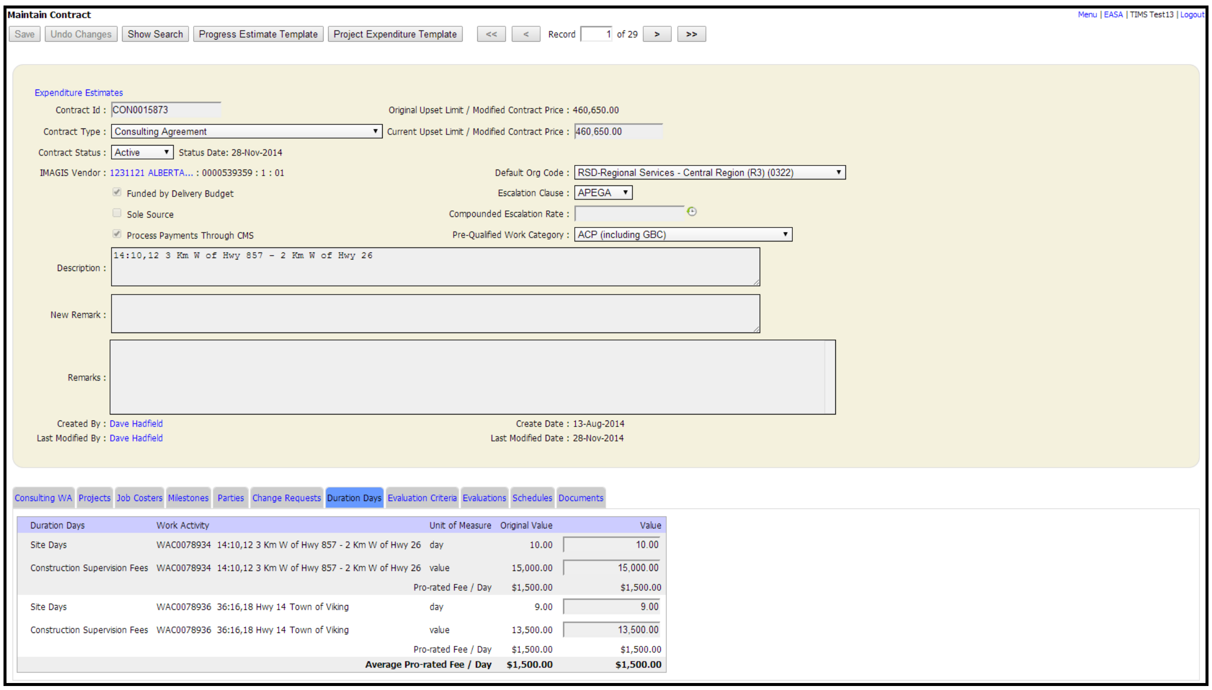
Field	Description
Milestone Type	The type of milestone as defined from within the contract - at the time the change request was created.
Work Activity	If the Milestone in the contract is associated with a Work Activity, the same Milestone/Work Activity is listed in the Change Request.
Original	Displays the Original Expected Date as entered in the Contract.
Current	Displays the most current Expected Date as of any previous Change Requests.
New/Requested	The user enters the new Expected Date manually or by clicking the calendar button. If the Milestone tab has both the Specified Contract Completion Date and the Contract Invoicing Completion date AND the current dates are the same; enter the new Expected Date into both New/Requested Date fields. If the new Expected Date is before the Contract Invoicing Completion Date and after the Specified Contract Completion Date; enter the new Expected Date in the New/Requested field for the Specified Completion Date only.
Action Type	Automatically displays the Action Type (No Change, Add, Remove, Change) after the screen is saved.

Duration Days Tab

A change request for a consulting contract will display a Duration Days tab. When a Change Request that impacts site days is approved, PMA Delivery automatically updates the Maintain Contract - Duration Days tab with the approved values.

External Consultant do not Add or Remove Duration Days (Sites and Construction Supervision). Consultants are to change existing duration days only.

Figure 22.14 Maintain Contract screen – Duration Days tab



Alert! If the original Duration Days are not shown on the Maintain Contract screen - Duration Days tab: contact the AT Regional Administrator. Do Not create a CR until after the original values have not been entered.

Duration Days Tab

If a Change Request for a Consulting Contract is going to impact Site Days, it's recommended that the original site day values be entered prior to creating the Change Request. This is done by the Regional Project Administrator.

In simple terms, the Duration Days tab shows the number of days that the consultant is to be on the construction site and the total fee charged to supervise the construction for the specified work activity.

Alert! When a Change Request is first created it pulls in data from the Contract. If the original Site Days and Construction Supervision Fees have not been entered on the Contract, they will not be listed on the Duration Days tab of the Change Request. There will be no history.

Each item listed on the Duration Days tab must be a unique combination. Each Site Day/Work Activity or Construction Supervision Fee/Work Activity combination must be unique.

Alert! If the original Duration Days are not shown on the Maintain Contract screen - Duration Days tab: contact the AT Regional Administrator. Do Not create a CR to change Duration Days if the original values have not been entered.

Figure 22.15 Maintain Change Request screen - Duration Days example

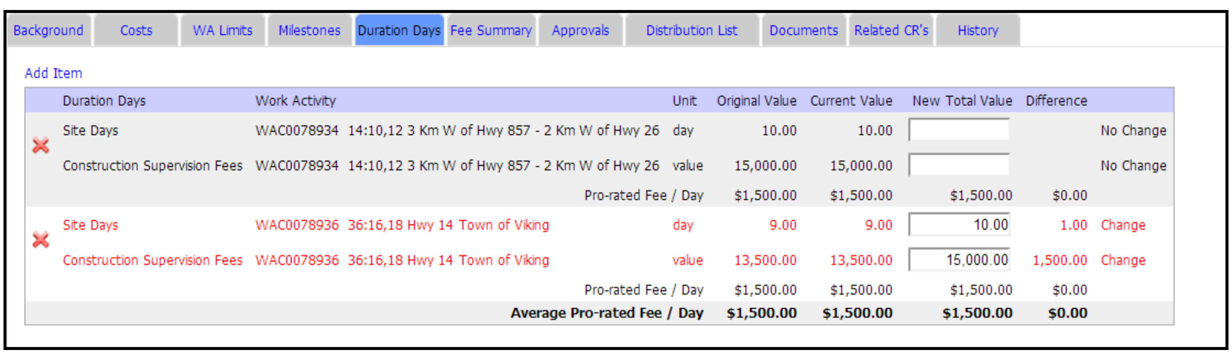


Table 22.7 Duration Days tab - fields

Field	Description
Site Days	Displays the item type: Site Days or Construction Supervision Fee.
Work Activity	Displays the Work Activity associated with the Site Days or Construction Supervision Fee.
Unit	Displays the unit of measure: Site Days = Day, Construction Supervision Fee = Value (total dollars).

Table 22.7 Duration Days tab - fields

Field	Description
Original Value	Displays the Original entries.
Current Value	Displays the most Current values (may include previous change requests).
New/Requested Value	Used to enter the new change request values.
Action Type	Automatically displays the Action Type (No Change, Add, Remove, Change)

Hint: Value entries made on the Duration Days tab do not impact the Costs tab and vice versa. However, Work Activities added on the Costs tab will be available on the Duration Days tab (Work Activity drop down).

Fee Summary Tab

The Fee Summary tab displays dollar amounts from the Contract and the Change Request. Some of the field labels vary depending on the contract type. Contracts that have a Tender (construction, construction job, CMA maintenance) are referenced in the table below as ‘Construction’. All other contract types are referenced as ‘Other’.

Alert! Amounts from Approved in Principal CR’s are not included on the Fee Summary Tab (e.g. Previous Approved values).

Figure 22.16 Fee Summary Tab – Consulting Contract

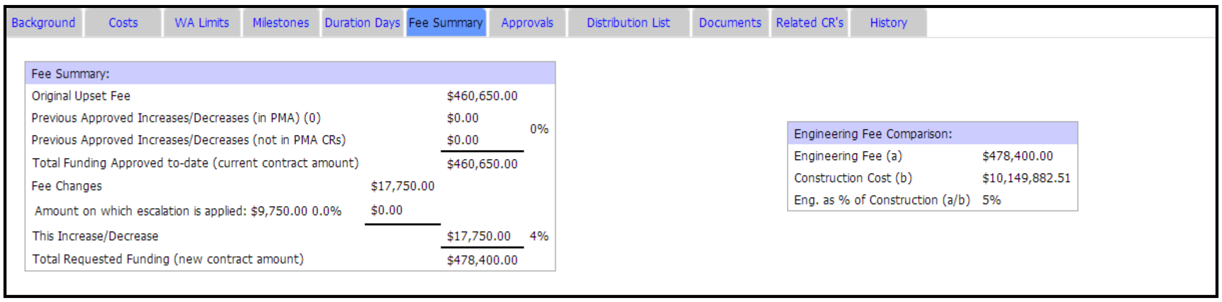


Table 22.8 Fee Summary tab - fields

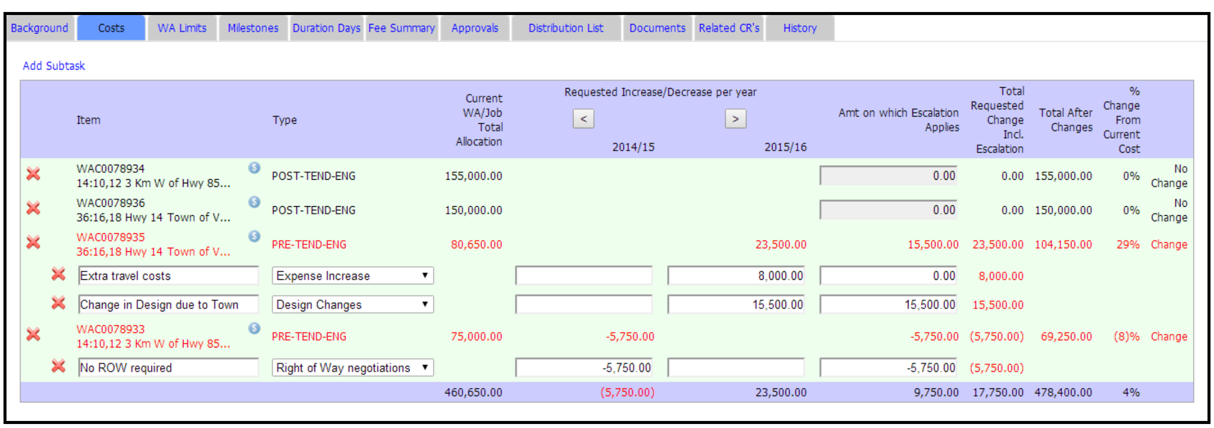
Field	Description
Original Upset Fee (other)	Displays the Original Contract Amount for the Contract. This value comes from the contract (Maintain Contract screen). Also displayed as: Original Modified Tender Price (construction)
Previous Approved Increases/Decreases (in PMA)	Displays the sum of all previously Approved change requests processed in PMA. Also displayed as: Previous Approved Overruns/Underruns (in PMA) (construction)
Previous Approved Increases/Decreases (not in PMA)	Displays the sum of all previously Approved change requests processed outside of PMA. Also displayed as: Previous Approved Overruns/Underruns (not in PMA) (construction)
Total Funding Approved to-date (current contract amount)	Displays the sum of the Original amount, and any previously approved amounts.
Fee Changes	Displays the grand total of the Total Requested Change column on the Costs tab.

Table 22.8 Fee Summary tab - fields

Field	Description
Amount on which escalation is applied (consulting contracts only)	Displays the total amount of escalation and the amounts used in the calculation. Professional Services Section – Consulting is responsible for entering the bulk annual escalations. Regional users enter amounts where escalation is applicable on the Costs tab. If escalation is applicable, it is applied to costs that span multiple years. Not only the current year.
This Increase/Decrease	Displays the sum of the Fee Changes and Escalation. Also displayed as: This Overrun/Underrun (construction)
Total Requested Funding (New contract amount)	Displays the sum of 'Total Funding Approved to-date' and 'This Increase/Decrease'.
Engineering Fee (a)	For a Consulting Contract change request the 'Total Requested Funding' is displayed. For a Construction Contract change request it is the summation of Cost Estimates (Maintain Work Activity screen) of all engineering work activities that are related to the Construction work activities.
Construction Cost (b)	For a Construction Contract change request the 'Total Requested Funding' is displayed. For a Consulting Contract change request it is the summation of Cost Estimates (Maintain Work Activity screen) of all construction work activities that are related to the Consulting work activities.
Engineering as a % of Construction (a/b)	Displays the percentage of Engineering Fee to the Construction Costs (rounded to the nearest whole number)

Figure 22.17 below shows the Costs tab that impacted the Fee Summary in Figure 20.17 above.

Figure 22.17 Fee Summary Tab – Costs impacting Summary



Approvals Tab

The Approvals tab provides an area for the user to identify parties (people/groups) that are required to recommend and approve (or reject) the Change Request.

See: *See **“Add Approvers” on page 23-19 for additional information.***

A row is displayed for each approver: sorted in ascending order, by approval order (the approval path for the Change Request).

Alert! Each approver must take their turn in the order in which the approvers are listed.

Figure 22.18 Approvals Tab empty

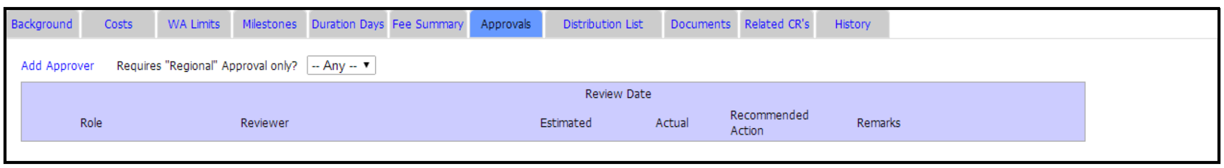


Table 22.9 Approvals tab - links

Link	Description
Add Approver	Allows the user to build the approval path.
Requires “Regional” Approval Only?	Allows the user to identify that the Change Request only requires “regional” approval.
View Expenditure Officer Authority Guidelines	Opens the Expenditure Officer Authority Guidelines document for viewing on-line.

Notify Programming

If the Change Request will ultimately impact the dates and/or dollars of the contract, you must inform Programming sooner than later. When the Change Request receives final approval, Programming will be copied on the final email which is after the fact. Notifying Programming can be handled in one of two ways:

1. Send an email to Programming before creating the Change Request to learn if funds are available or not.
2. Create the Change Request but add Programming as the first approver to again learn if funding would be available or not.

Alert! If a Change Request will impact the Amount of the Contract, the Dates of the Contract, or the LRS of a Work Activity you must inform Programming early in the Change Request process.

Figure 22.19 Approvals Tab – Consulting Agreement

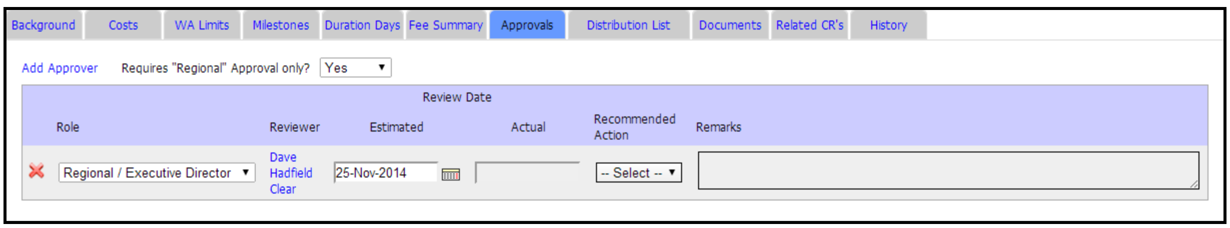


Table 22.10 Approvals tab - fields

Field	Description
Role	Displays the role of the Reviewer. Administrator, Sponsor, Regional / Executive Director. Professional Service Section, Programming Section, Tender Administration, Contract Review Committee, Assistant Deputy Minister, Deputy Minister.
Reviewer	Displays the name of the individual or group representing the role.
Estimated	As each Approver is added, the Estimated date is calculated but can be manually entered. PMA uses one week to separate each approver. For example, today is January 13 so the first approver is estimated to complete their review on January 20.
Actual	Displays the date when the approver selected a Recommended Action and saved the Change Request.
Recommended Action	Displays the Recommended Action (Recommend/Reject) of the Approver. The final approver selects Approve or Reject.
Remarks	Displays any remarks the Approver entered at the time they made their recommendation.

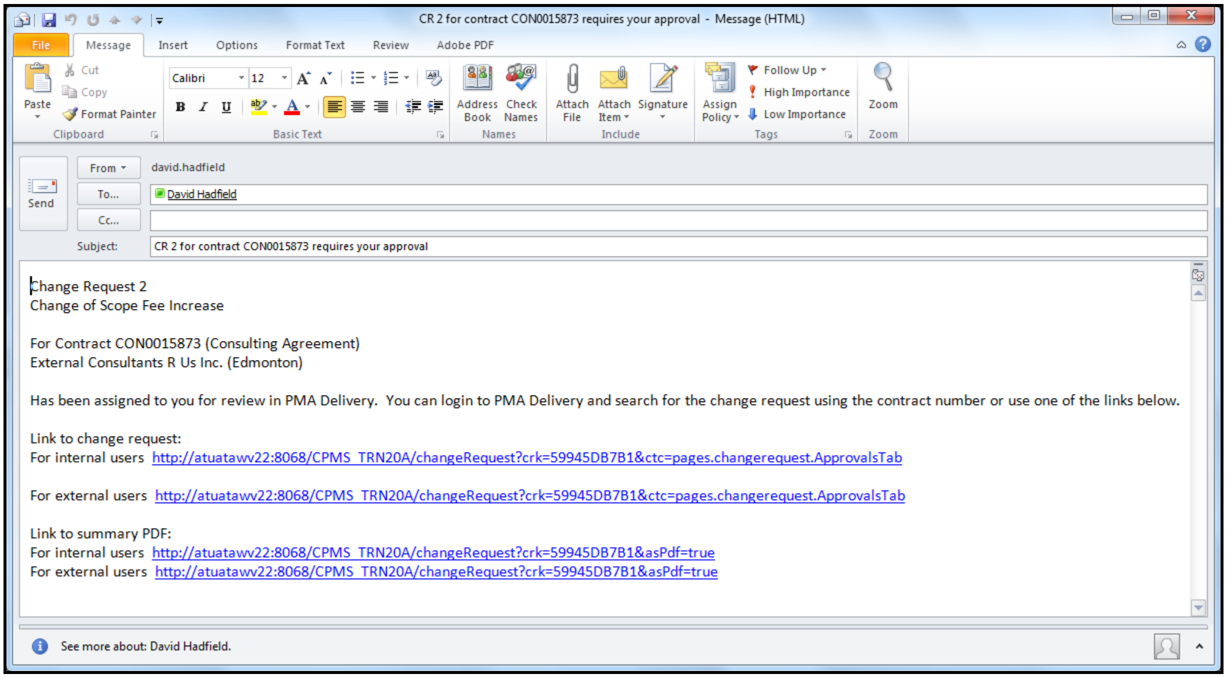
Alert!	If the Change Request is for a Contract Extension ONLY – DO NOT include Professional Services or Programming on the Approvals Tab. They will be notified automatically when the CR is Approved.

Hint:	If you change the order of the Approvers, double check the Estimated Date as it will not be automatically recalculated.

Approval Emails

PMA Delivery uses emails to notify approvers when change requests are awaiting their review and recommendation.

Figure 22.20 Approval Email sample



Alert!	If you receive an error message when trying to email the notification, contact the GOA Service Desk for assistance 1-888-427-1462.

Hint:	A copy of the email will be stored in the senders Outlook Sent folder.

Approved Change Request

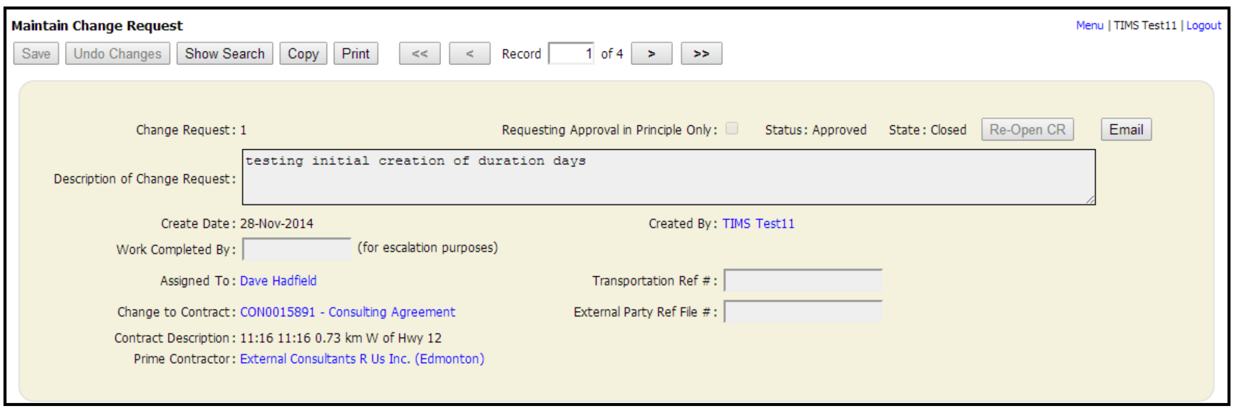
When the final approver recommends that the change request be approved, emails are automatically generated. Recipients of the 'approved' email are:

- The creator of the Change Request
- Every person listed on the Approvals tab
- Professional Services Consulting
- Programming

If the Change Request is for a Consulting Contract, Professional Service Consulting and Programming are sent a copy of the final approval email. If the Change Request impacts any other contract type, only Programming is sent a copy of the final approval email.

See: *See **"Distribution List Tab" on page 22-25 for additional information.***

Figure 22.21 Approved & Closed CR



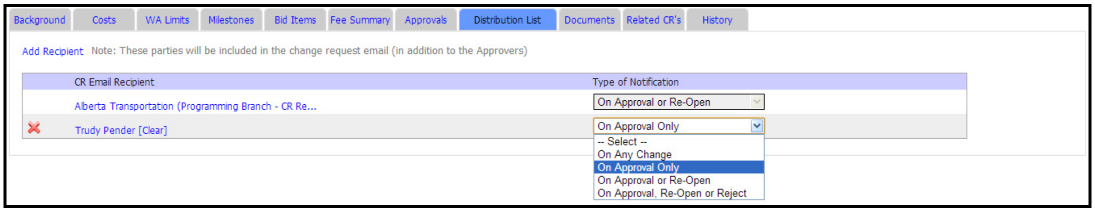
Distribution List Tab

The Distribution List tab allows users to build a list of people who will receive emails when: the CR changes, is Approved, is Re-Opened, is Rejected or any combination of these conditions.

This allows the Approvals tab to contain only the people involved in the Approval Process – the people whose name needs to be on the Approval.

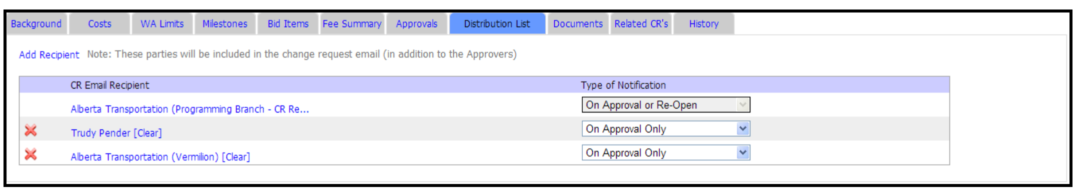
Update: Administrative Assistants may be added to the Approvals tab to allow them to review the Change Request for completeness.

Figure 22.22 Notification Types



Alert! Administrative Assistants no longer need to be added to the Approvals Tab in order to be notified when the CR is Approved.

Figure 22.23 Group or Individual Recipients



Hint: A TIMS Group can be selected to receive emails. This saves adding multiple people from the same office.

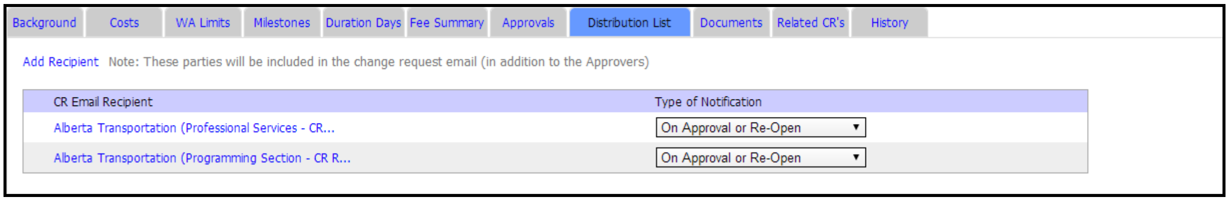
As you can see by the small sampling below there are TIMS IDs set up for all district, department and branch offices in Alberta Transportation.

Figure 22.24 TDRA Group Listing sample

9157	Alberta Transportation (Finance Branch)
8770	Alberta Transportation (Ft. McMurray)
9728	Alberta Transportation (Geotechnical Services)
9104	Alberta Transportation (Grande Prairie)
9030	Alberta Transportation (Hanna)
10374	Alberta Transportation (High Level)
9731	Alberta Transportation (Highway Geomatics)
9724	Alberta Transportation (Highway Operations)

Default email recipients are listed depending on the contract type. Programming is always notified and if the contract type is consulting, PSS-Consulting is automatically added to the Distribution Tab.

Figure 22.25 Distribution List Tab - Consulting Contract Default

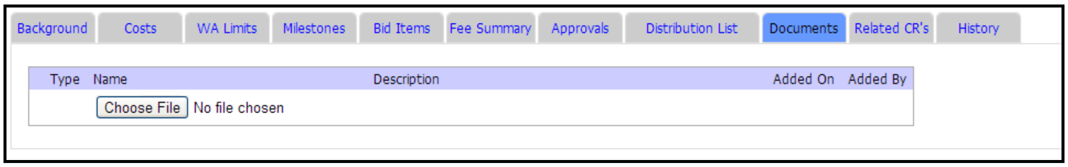


Documents Tab

The documents tab is used to attach files (documents, spreadsheets, graphics, emails, etc.) to support the need for the Change Request.

Alert! It is critical that the Consultant's supporting document(s) be attached to the Change Request.

Figure 22.26 Documents Tab – Choose button



Hint: Files on the Documents tab have been uploaded to PMA Delivery. Therefore, any changes made to the original files, subsequent to their attachment to the Change Request, will not appear when opened from the Documents tab.

Figure 22.27 Documents Tab

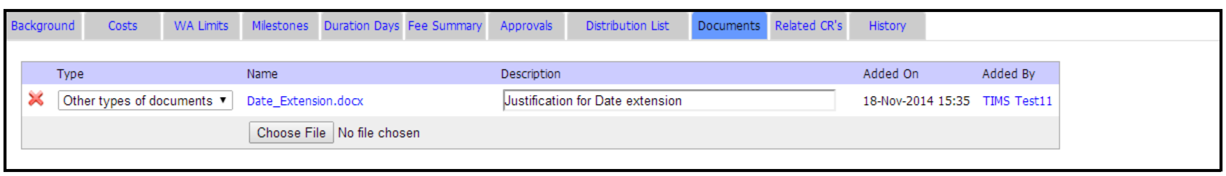


Table 22.11 Documents tab - fields

Field	Description
Type	Displays the type of file attached: Other, or Action Request.
Name	Displays the complete name of the file including the extension.
Description	A mandatory field the user uses to explain the contents of the file beyond what the file name may imply.

File Naming Conventions are covered in: https://www.rimp.gov.ab.ca/publications/pdf/DocumentNamingConventions.pdf

Related CRs

The Related CRs tab allows users to identify other change requests that have a relationship to the one being viewed. For example, if a Change Request is created to extend the construction contract there will probably be a requirement to extend the associated consulting contract. A relationship between the Construction CR and Consulting CR can be created.

Table 22.12 Related CRs tab - links

Link	Description
Create Related CR	Allows the user to build a brand new Change Request.
Relate Existing CR	Allows the user to search and select an existing CR.

Figure 22.28 Related CRs Tab

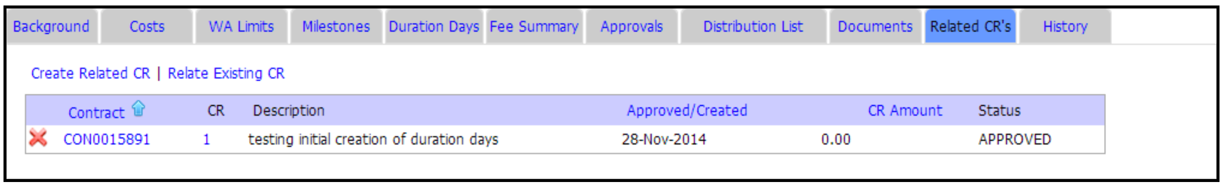


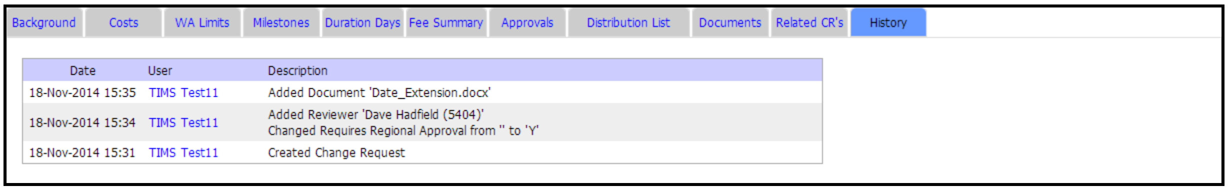
Table 22.13 Related Documents tab - fields

Field	Description
Contract	Displays (as a link) the Contract number that is Related to the CR being viewed.
CR	Displays (as a link) the CR number of the related contract.
Description	Displays the contents of the Description field for the related CR.
Date	Displays the date the related CR was created.
CR Amount	Displays the Amount (dollars) of the related CR.
Status	Displays the current status of the related CR.

History Tab

The History tab displays each individual change made to the Change Request being viewed. The entries are listed in date descending order, listing the most recent change at the top of the list.

Figure 22.29 History Tab



Date	User	Description
18-Nov-2014 15:35	TIMS Test11	Added Document 'Date_Extension.docx'
18-Nov-2014 15:34	TIMS Test11	Added Reviewer 'Dave Hadfield (5404)' Changed Requires Regional Approval from '' to 'Y'
18-Nov-2014 15:31	TIMS Test11	Created Change Request

Table 22.14 History tab - fields

Field	Description
Date	Displays the date and time that the action/change was made to the Change Request.
User	Displays the name of the user who made the change.
Description	Displays the action that took place.

Chapter 23: Create, Submit & Approve Change Requests

This module will cover the creation, submission and approval of change requests.

Topics in Chapter:

1. Searching for Change Requests
2. Change Request Process
3. Consultant Submits Change Request
4. Creating a Change Request
5. Submit a Change Request
6. Print Change Requests
7. Cancel or Close a Change Request
8. Approval in Principle Change Requests

Searching for Change Requests

Searching for existing change requests is an option located in the Change Requests column of the External Access Home Page.

Figure 23.1 External Access Home Page

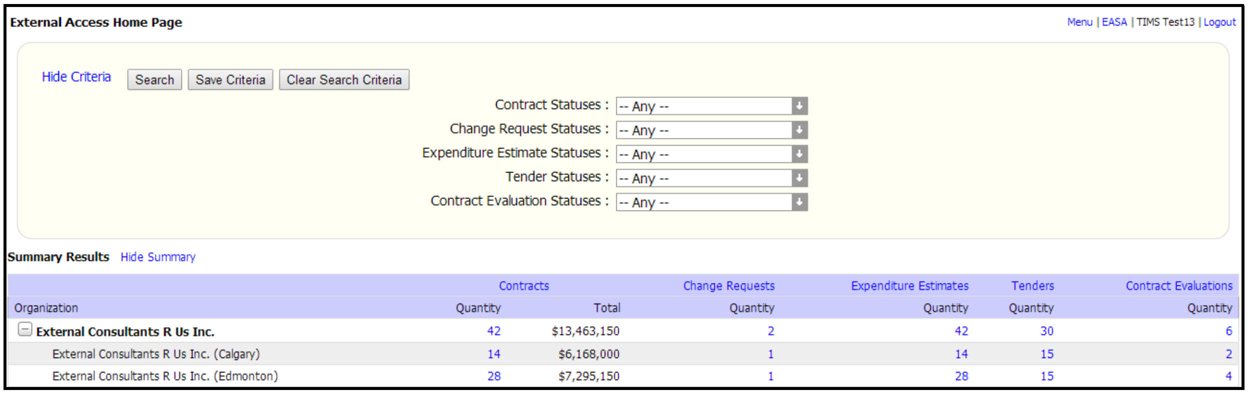
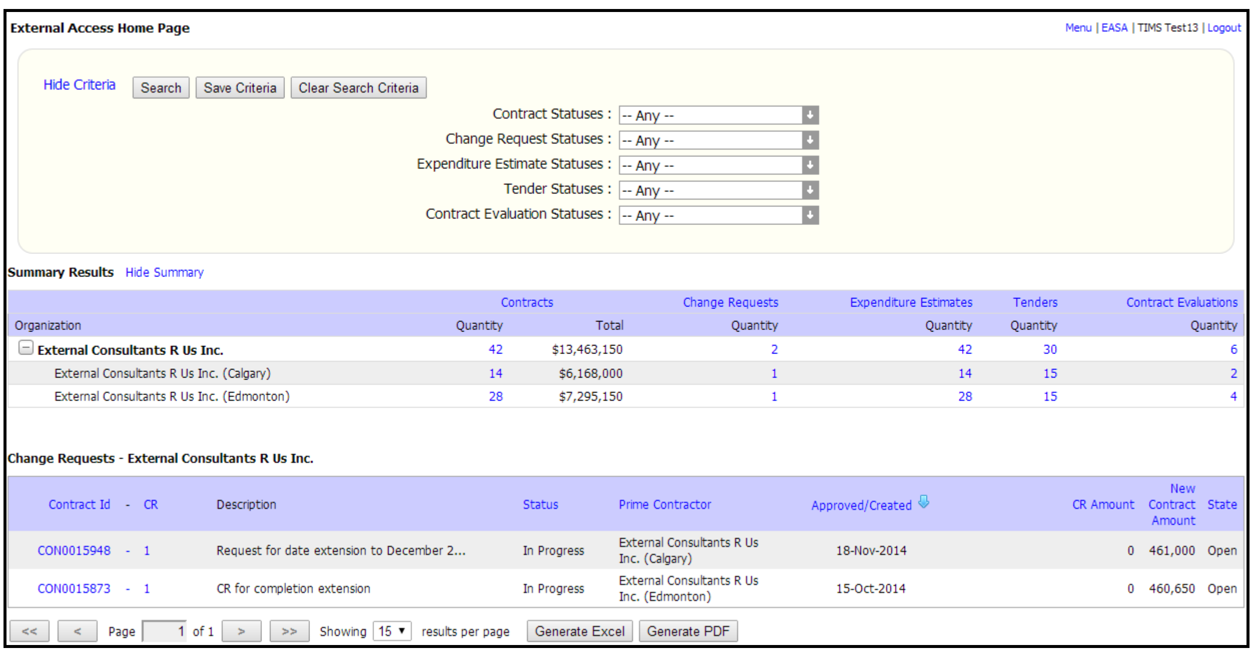


Figure 23.2 Change Request listing



Hint: The Contract Id and CR are combined in the results. Clicking on either will open the Maintain Change Request screen.

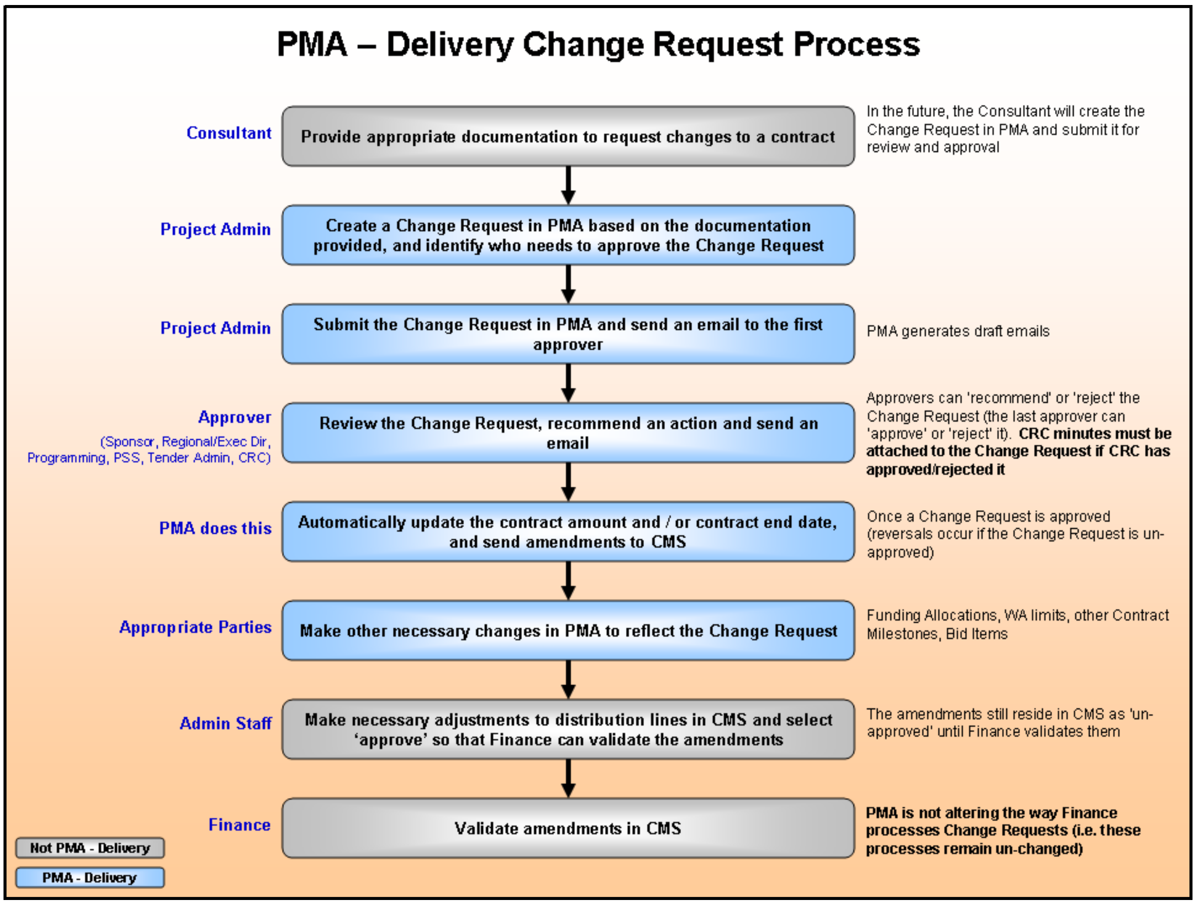
Change Request Process

The following steps describe the typical process for managing a Change Request using PMA – Delivery when a consultant raises a Change Request (either on behalf of the contractor or for the consulting work itself).

Alert!	PMA will only allow Change Requests to be created for active contracts that have been approved in Finance's Contract Management System (CMS).

Advances have been made since the figure below was created. Who performs each step has changed but the process has not. For example, the consultants create and submit the Change Request for consulting contracts.

Figure 23.3 Change Request Process



Consultant Submits Change Request Documentation

For various reasons the need for a change request can occur. These can be initiated by the Consultant or by the Project Administrator or the Contract Sponsor. Upon request by the Project Administrator, the Consultant drafts a letter outlining the reason (i.e. rates, days, duration, description and reason) for the change. This information can be used to explore possible scenarios or to support the creation of a change request.

External consultants can create the on-line Change Requests for their company's consulting contracts. Change Requests for construction contracts are still created by the Project Administrator with the consultants' supporting document(s).

Alert!	The Consultants supporting documents MUST be attached to the Change Request. This is easily done using the Documents tab.

Create a Change Request in PMA

Change Requests can be created from the Maintain Contracts screen or when prompted on the Expenditure Estimates screen. Entries on expenditure estimates that will impact the contract amount or contract date will cause the user to be prompted to create a change request.

Alert! If the original Duration Days are not shown on the Maintain Contract screen - Duration Days tab: contact the AT Regional Administrator. **Do Not** create a CR to change Duration Days until after the original values have been entered.

Create Change Request from Maintain Contract Screen

After developing the supporting documentation, the External Consultant can begin the work of creating a change request in PMA-Delivery. The first step would be to find the existing contract requiring the change request. This can be done by:

1. Selecting a Contract ID from the External Access Home Page, Contracts list OR,
2. Searching for the Contract from the Search Contracts screen.

Hint: The only screen that allows the creation of a Change Request is the Maintain Contract screen on the Change Request tab.

Figure 23.4 Create Change Request - Contract Listing

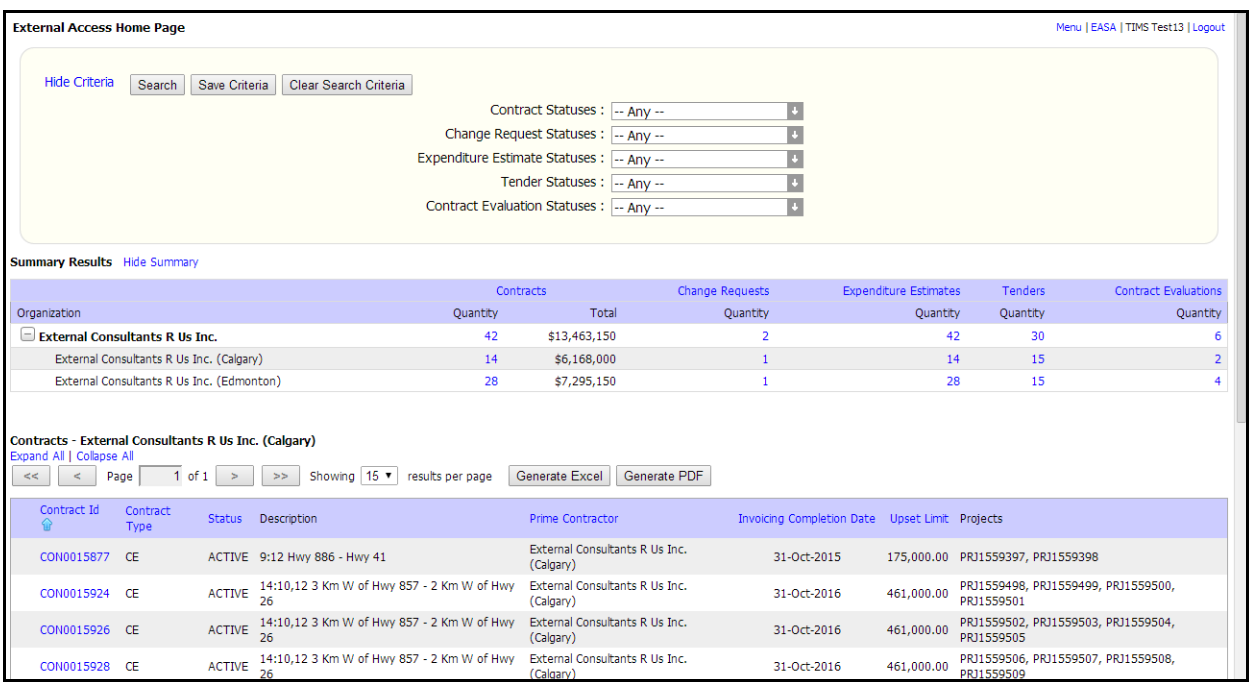


Figure 23.5 Search Contract screen

Figure 23.6 Maintain Contract screen - Change Request tab blank

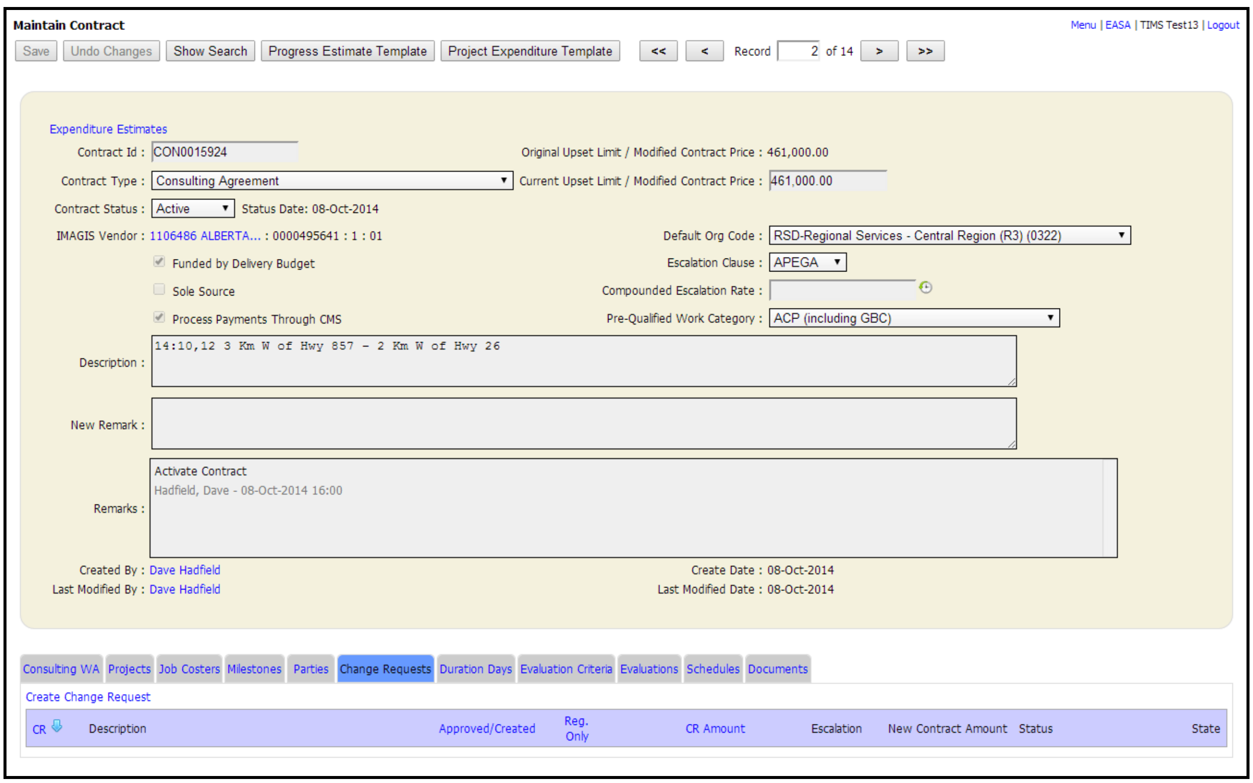
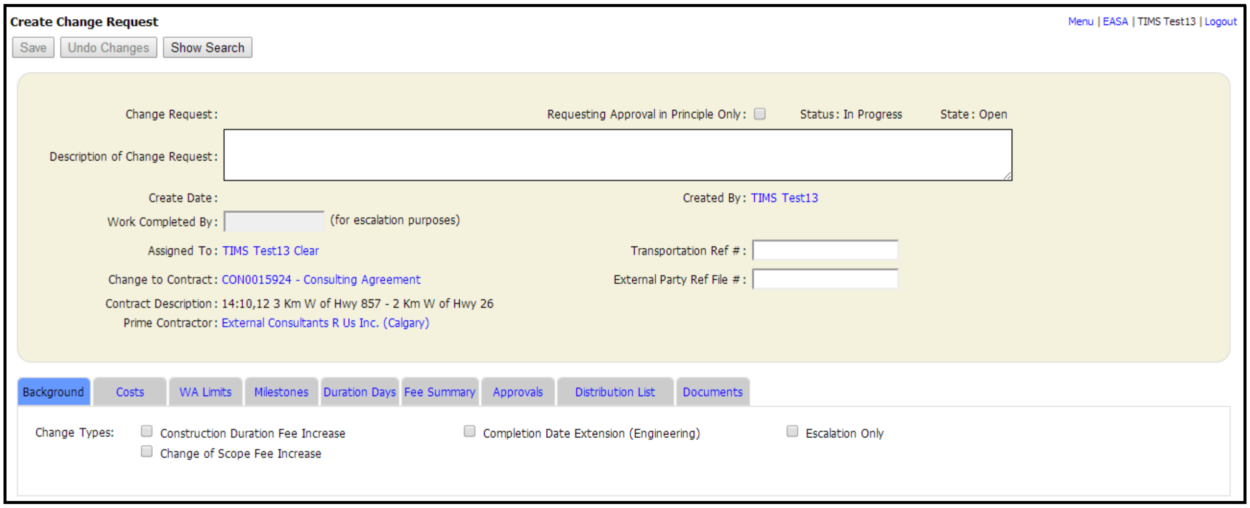


Figure 23.7 Create Change Request screen - blank



Hint: PMA will open the Change Request (existing or new) in a new tab or window.

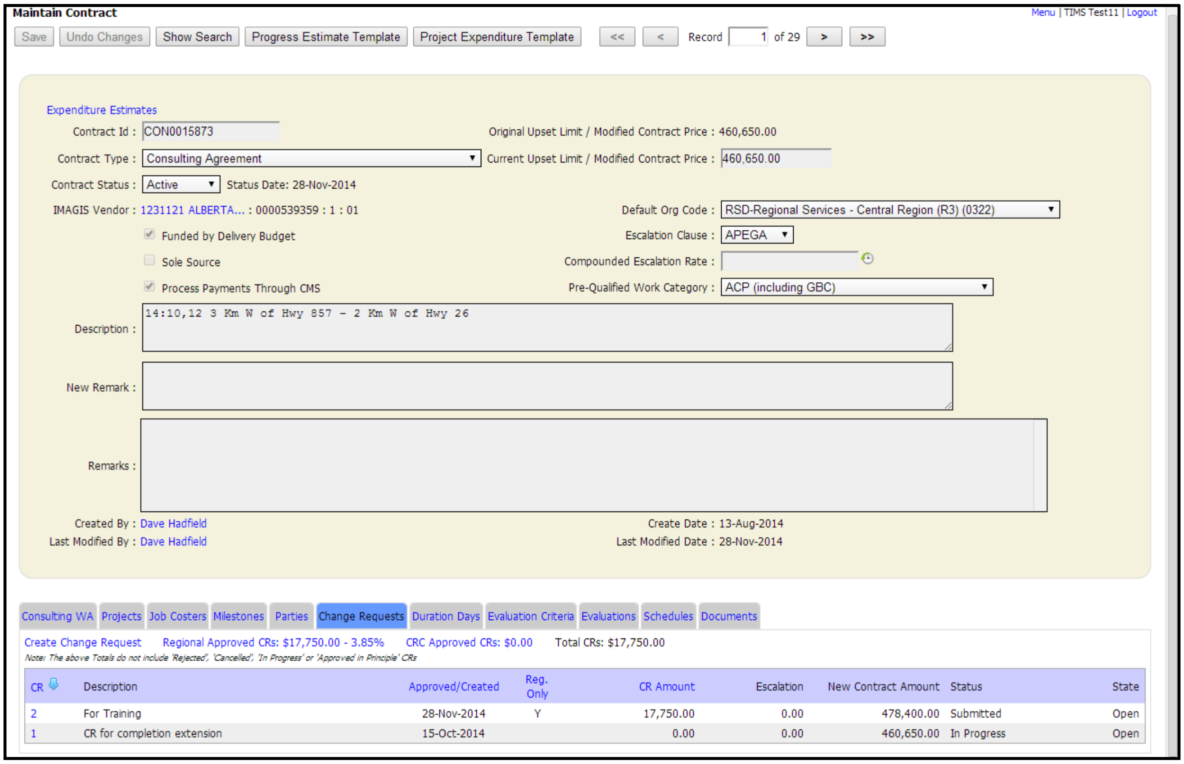
See: *See **"New Change Request - Warning Message" on page 23-31 for additional information.***

Change Requests Tab

The Change Requests Tab on the Maintain Contract screen allows the user to:

- Create a new Change Request
- View existing Change Requests

Figure 23.8 Change Request Tab – Existing CR listing

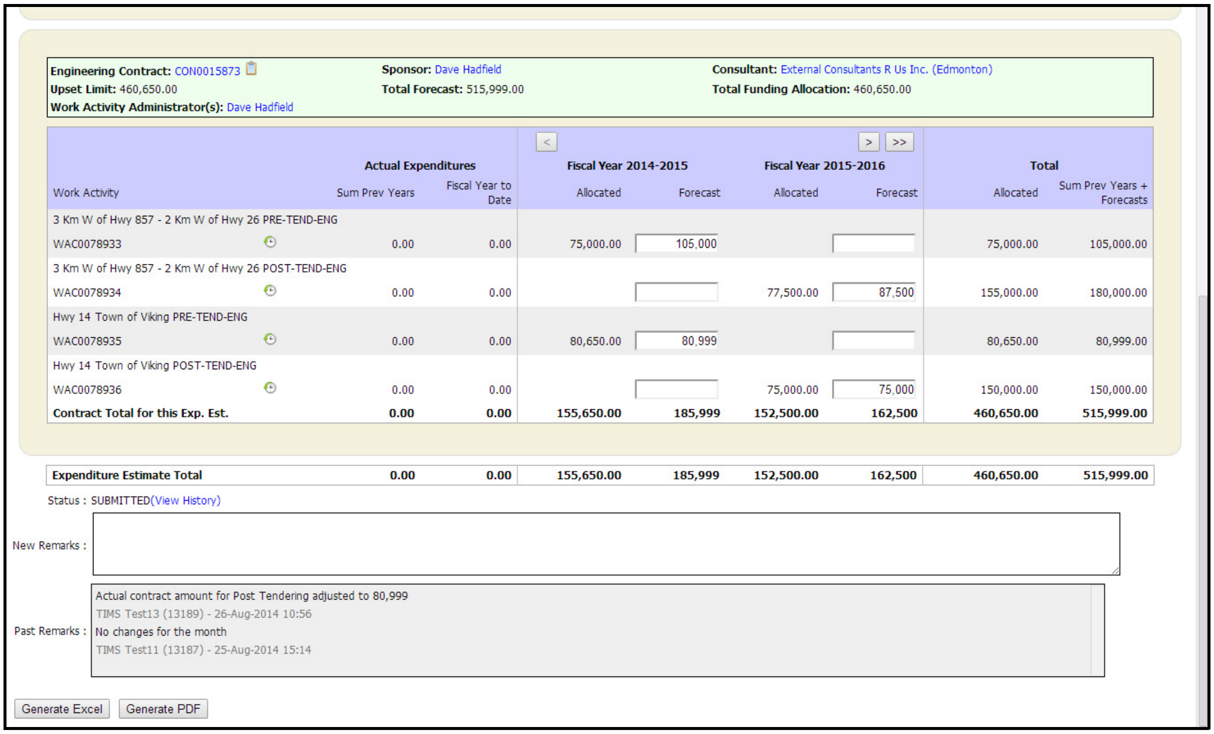


Hint: Existing Change Requests will automatically be listed when the Change Requests Tab is displayed.

Create Change Request from Maintain Expenditure Estimate Screen

When an Expenditure Estimate that has changes to Forecast Amounts or identifies amounts in fiscal years not previously forecast is submitted, the option to create a Change Request appears.

Figure 23.9 Maintain Expenditure Estimate screen



Engineering Contract: CON0015873
Upset Limit: 460,650.00
Work Activity Administrator(s): Dave Hadfield
Sponsor: Dave Hadfield
Total Forecast: 515,999.00
Consultant: External Consultants R Us Inc. (Edmonton)
Total Funding Allocation: 460,650.00

	Actual Expenditures		Fiscal Year 2014-2015		Fiscal Year 2015-2016		Total	
Work Activity	Sum Prev Years	Fiscal Year to Date	Allocated	Forecast	Allocated	Forecast	Allocated	Sum Prev Years + Forecasts
3 Km W of Hwy 857 - 2 Km W of Hwy 26 PRE-TEND-ENG WAC0078933	0.00	0.00	75,000.00	105,000			75,000.00	105,000.00
3 Km W of Hwy 857 - 2 Km W of Hwy 26 POST-TEND-ENG WAC0078934	0.00	0.00			77,500.00	87,500	155,000.00	180,000.00
Hwy 14 Town of Viking PRE-TEND-ENG WAC0078935	0.00	0.00	80,650.00	80,999			80,650.00	80,999.00
Hwy 14 Town of Viking POST-TEND-ENG WAC0078936	0.00	0.00			75,000.00	75,000	150,000.00	150,000.00
Contract Total for this Exp. Est.	**0.00**	**0.00**	**155,650.00**	**185,999**	**152,500.00**	**162,500**	**460,650.00**	**515,999.00**
Expenditure Estimate Total	**0.00**	**0.00**	**155,650.00**	**185,999**	**152,500.00**	**162,500**	**460,650.00**	**515,999.00**

Status : SUBMITTED(View History)

New Remarks :

Past Remarks :
Actual contract amount for Post Tendering adjusted to 80,999
TIMS Test13 (13189) - 26-Aug-2014 10:56
No changes for the month
TIMS Test11 (13187) - 25-Aug-2014 15:14

Generate Excel | Generate PDF

Hint: When the Expenditure Estimate is Submitted it is evaluated and if warranted, the window allowing a Change Request to be created appears.

The window provide the user with a link to the Maintain Contract screen or directly to the Create Change Request screen.

Figure 23.10 Create Change Request links

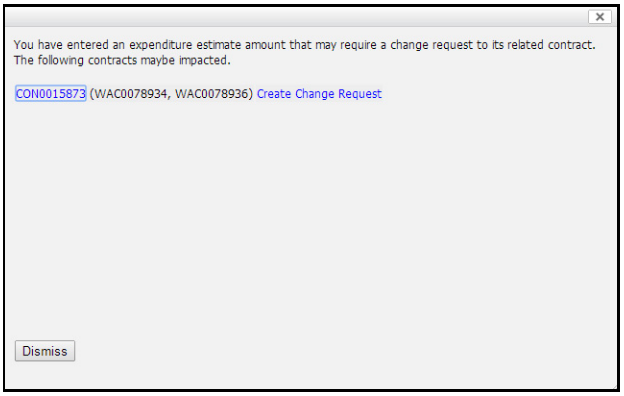
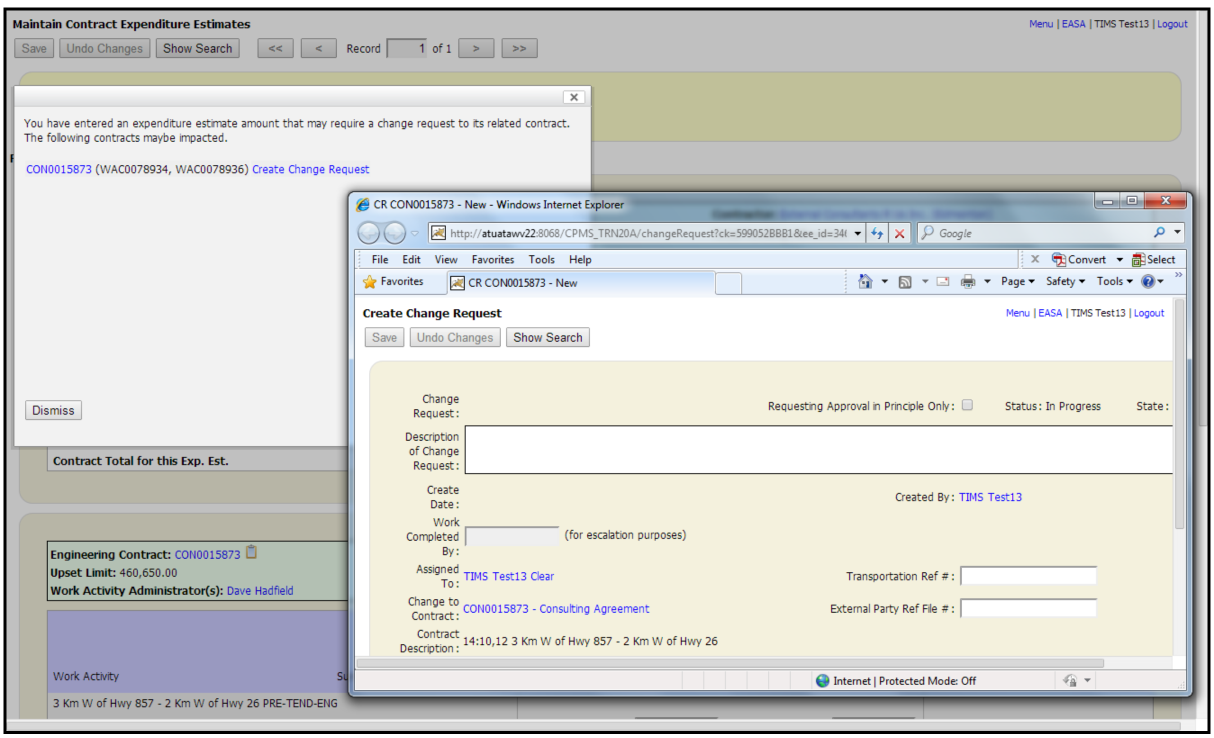
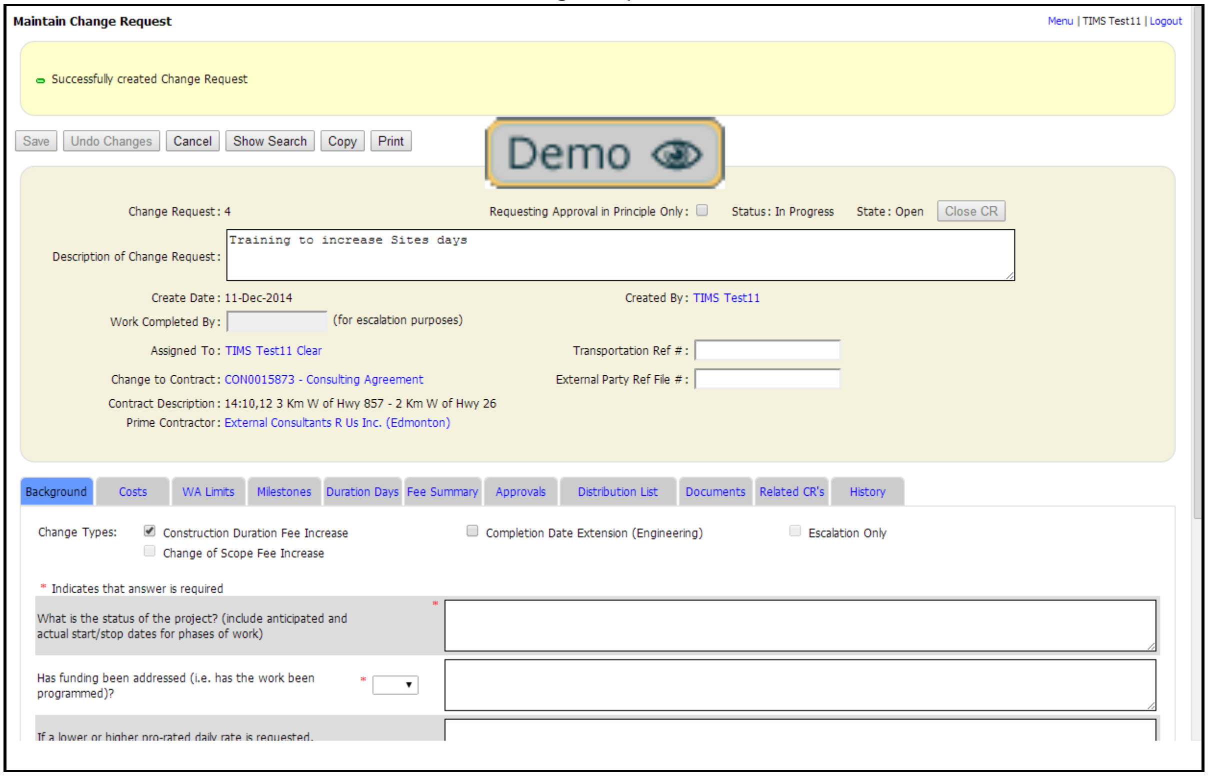


Figure 23.11 below shows the Create Change Request screen which opened as a result of clicking the Create Change Request link in the Expenditure Estimate window.

Figure 23.11 Change Request window



Demo 23.1 Create a Change Request



How To

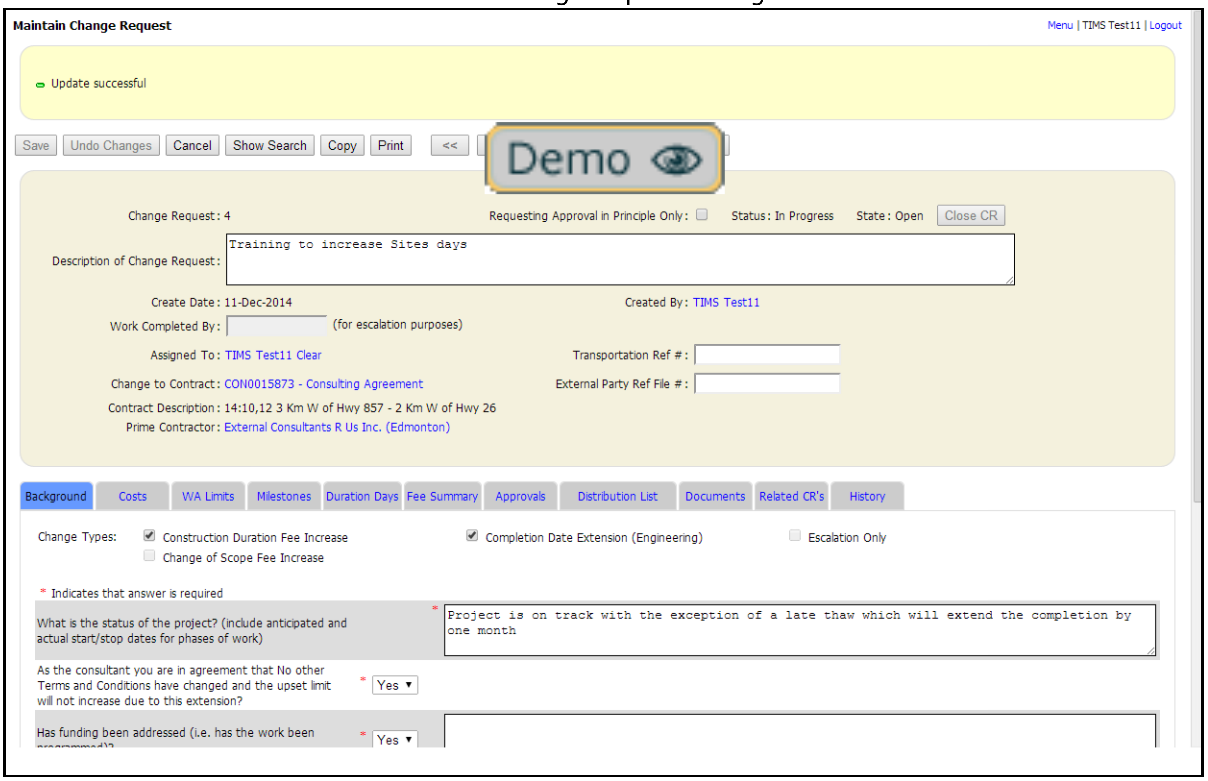
1. From the *Change Requests* tab on the Maintain Contract screen select the **Create Change Request** link.
2. From the *Create Change Request* screen type the purpose of the change request in the **Description** field.
3. In the *Background* tab select a **Change Type** check box.
4. Select the **Save** button.

Chapter 4 provided definitions and some examples on how each tab is used. The following sections provide step-by-step examples for some of the tabs.

Background

Once the Change Request exists, the user continues completing the tabs where entry is required. The reason/issue for the change request drives the Change Type you will select on the Background tab. This also helps direct you as far as what other tabs will require data entry. For example increasing the number of Site Days means an update on the Duration Days tab, and a Contract Extension means an update on the Milestones tab.

Demo 23.2 Create a Change Request - Background tab



How To

1. From the *Maintain Change Request* screen verify that all required **Change Types** are checked.
2. Enter or select answers to address each question displayed in the *Background* tab.
3. Select the **Save** button.

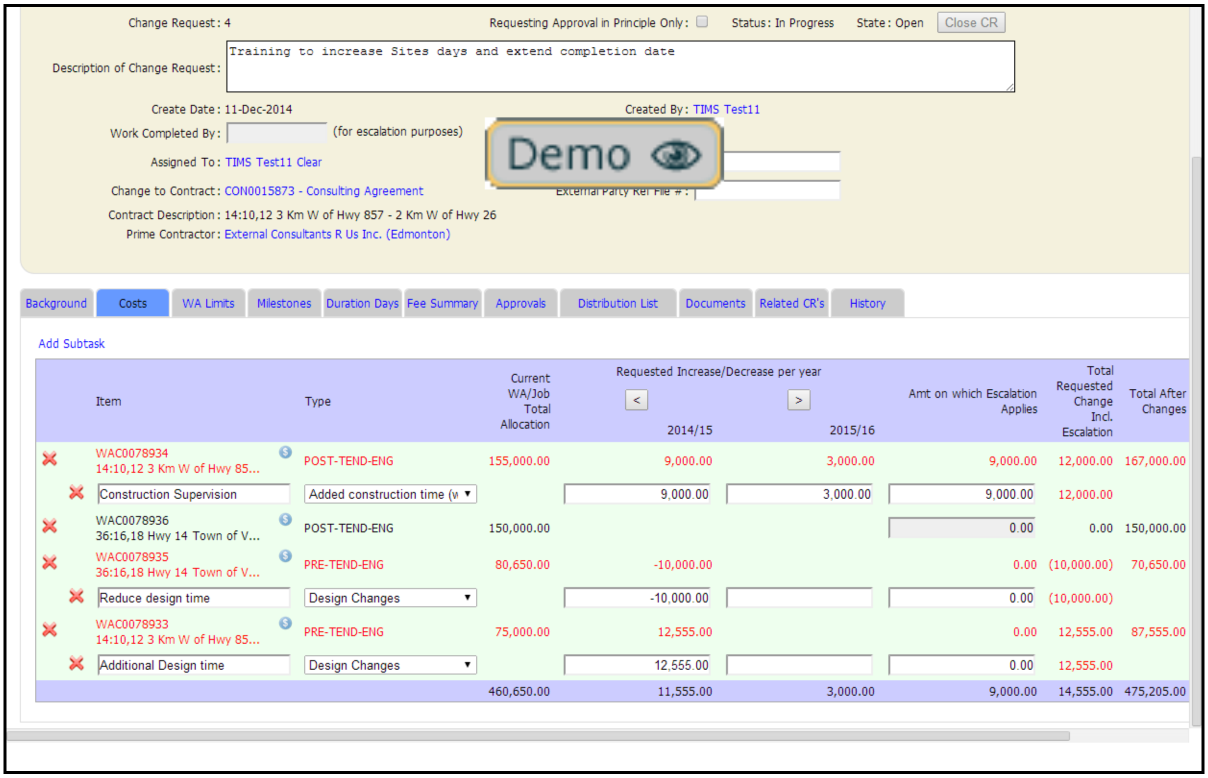
Costs

The Costs tab is used to identify the funding requirements.

Alert!	Do Not round funding values. If the consultants' documentation includes cents – include cents. The total on the Costs tab must exactly match the amount in the Consultant's statement.

Alert!	Updates to the Duration Days tab will have no automatic impact on the Costs tab. In order to request the funding required for the changes identified to the site days, corresponding entries need to be made on the Costs tab. The entries are made against the appropriate work activities.

Demo 23.3 Create a Change Request - Costs tab



How To

1. From the *Maintain Change Request* screen select the **Costs** tab.
2. Select the **Add Subtask** link.
3. Select the Add link for the Work Activity to have funding amounts changed.
4. Type a **Description** of the change item
5. Select a change **Type** from the drop down
6. Enter a **Dollar** amount in the appropriate fiscal year.
7. Adjust the **Amount on which Escalation Applies** to as needed.
8. Select the **Save** button.

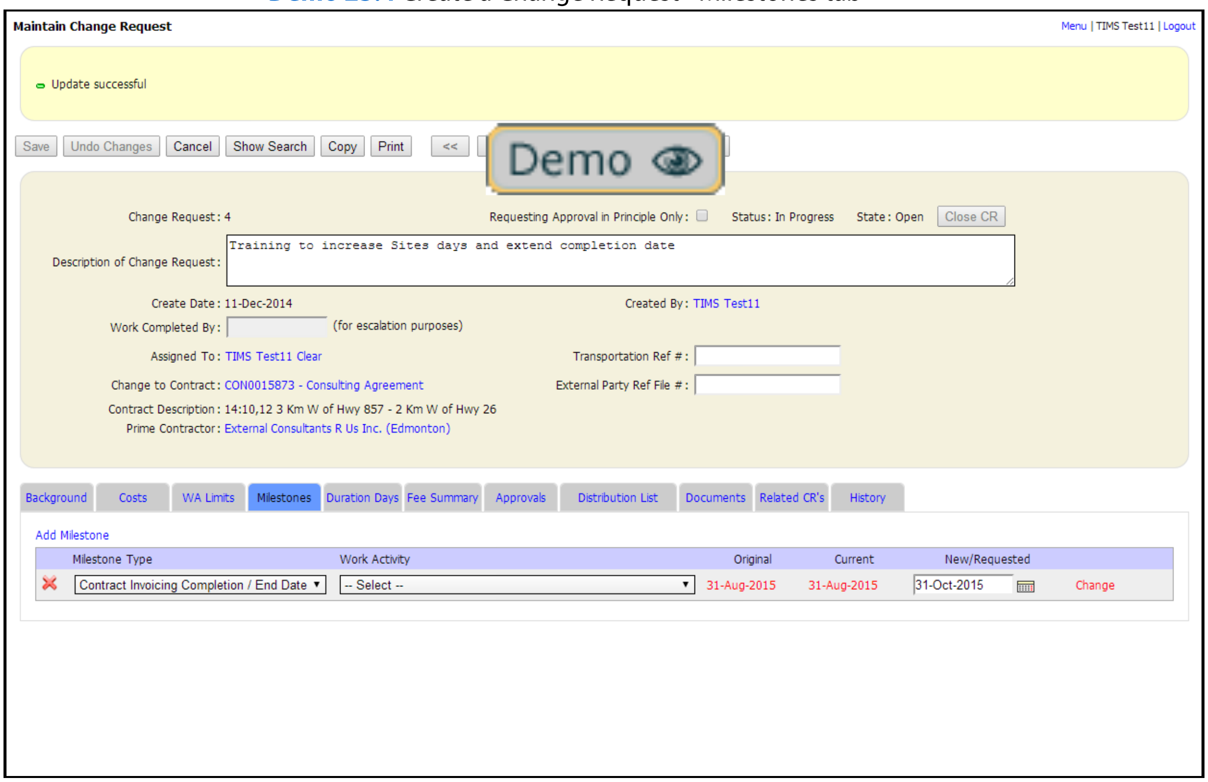
WA Limits

The Work Activity Limits tab is used to change the LRS values of work activities. Therefore, the WA Limits tab is not used in consulting contract change requests.

Milestones

The Milestones tab provides a place to enter new completion dates. Contract extensions need a new completion date and the Milestones tab is where the new date is entered. Later, when the Change Request is approved the affected milestone on the Maintain Contract screen will be automatically updated.

Demo 23.4 Create a Change Request - Milestones tab



How To

1. From the *Maintain Change Request* screen select the **Milestones** tab.
2. Type/select the new completion date in the **New/Requested** field.
3. Select the **Save** button.

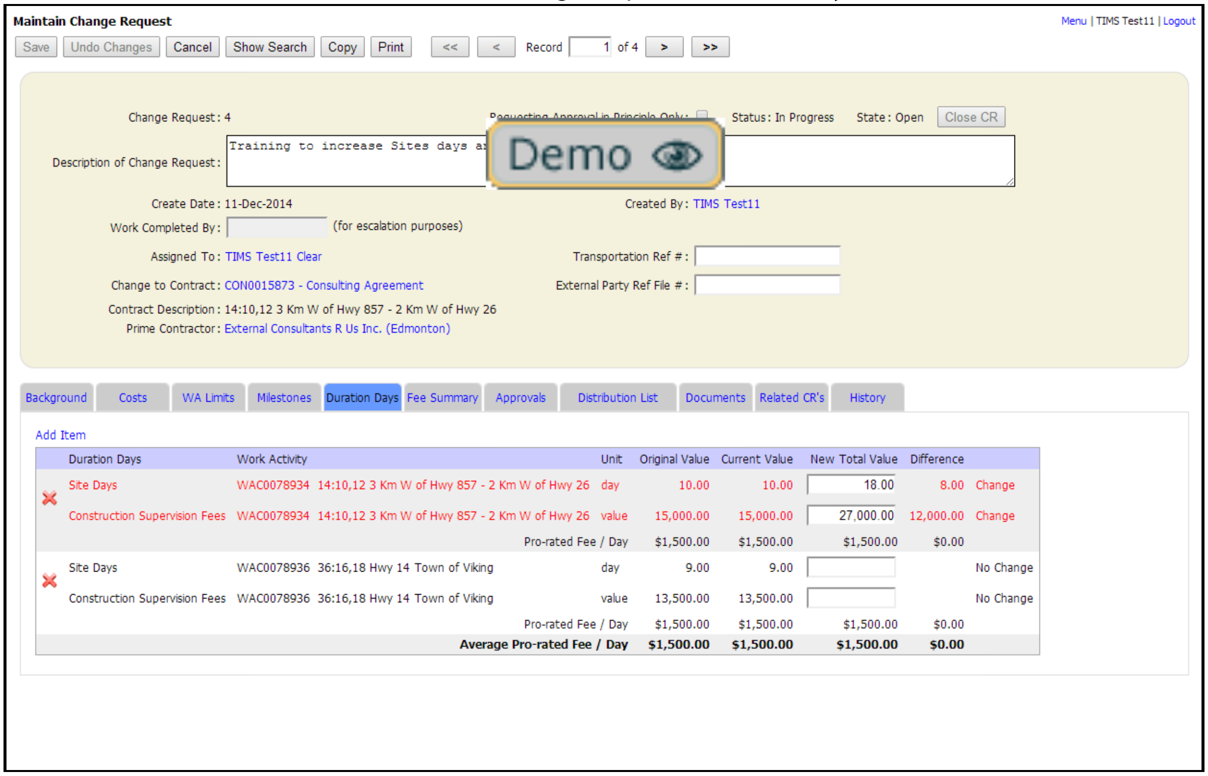
Duration Days

On the Maintain Contract screen there should be Duration Days (consulting contracts). Make sure that the original Duration Days appear in the tab before creating a Change Request.

Alert! When a Change Request is first created it pulls in data from the Contract. If the 'original' Duration Days values have not been entered on the Contract, they will not be listed on the tab of the Change Request. Contact the AT Regional Project Administrator to enter the original values **before** creating the Change Request.

When the Change Request is approved, the corresponding tab on the Maintain Contract screen will be updated. Old values will become historical.

Demo 23.5 Create a Change Request - Duration Days tab



How To

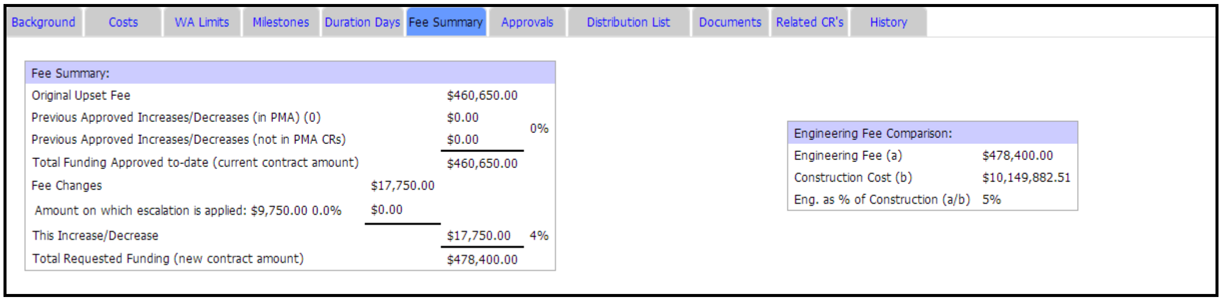
1. From the *Maintain Change Request* screen select the **Duration Days** tab.
2. For the appropriate Work Activity, enter a *New Total* in the **Site Days** field.
3. For the appropriate Work Activity, enter a *New Total* in the **Construction Supervision Fees** field.
4. Select the **Save** button.

Alert! Changes to the Duration Days are not automatically added to the Costs tab and therefore are not reflected on the Fee Summary tab. Entries will be necessary on the Costs tab to adjust the Contract total to support any Duration Day changes.

Fee Summary

The Fee Summary tab displays the impact the Change Request will have on the total costs of the contract.

Figure 23.12 Fee Summary tab – Consulting contract



Approvals

The Approvals tab on the Change Request screen provides a place to identify parties that must review and/or approve a Change Request.

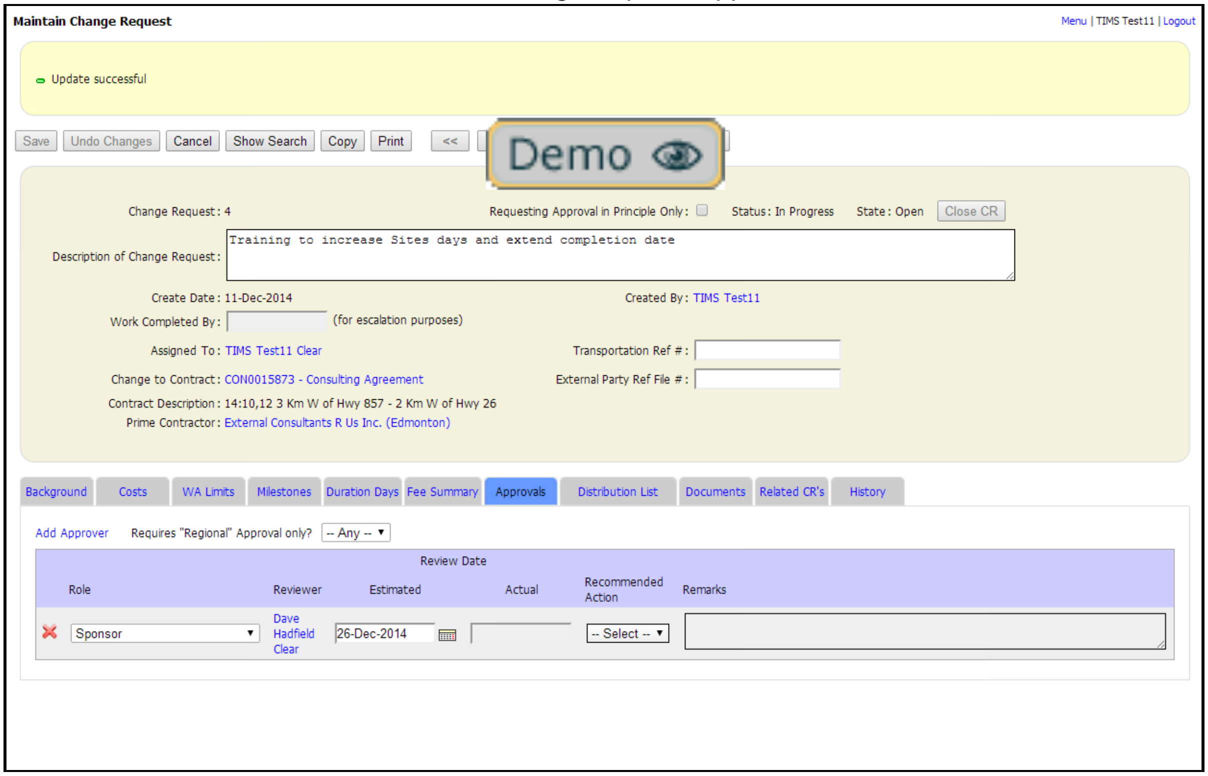
Alert! External Consultants must include (at minimum) the Contract Sponsor as an Approver.

Add Approvers

When adding approvers, the external consultant must add the Contract Sponsor at least. If the external consultant knows the name of the Project Administrator, they should add that persons name to the Approvals tab above the Sponsor. The Contract Sponsor is the minimum requirement in order to submit the CR.

Hint: Check the Parties tab on the Maintain Contract screen to determine the name of the Contract Sponsor.

Demo 23.6 Create a Change Request - Approvals tab



How To

1. From the *Maintain Change Request* screen select the **Approvals** tab.
2. Select the **Add Approvers** link.
3. From the *Role* drop down select **Sponsor**.
4. In the *Reviewer* field type and select the name of the **Contract Sponsor.**
5. Press the **Tab** key to complete the Reviewer entry.
6. Select the **Save** button.

PMA Delivery will automatically enter an Estimated Date for each approver added. The dates are typically one week apart.

Hint: If you change the order of the Approvers, double check the Estimated Date as it will not be automatically recalculated.

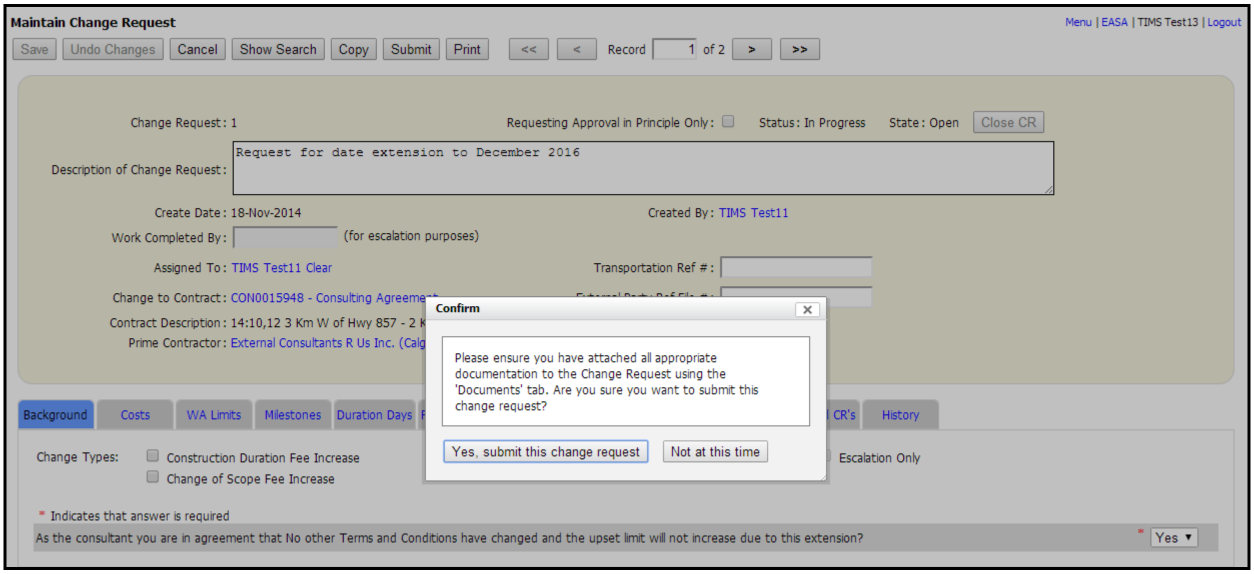
Alert! Only AT staff with access to PMA Delivery will appear in the Reviewers list on Change Requests.

Submit a Change Request

When the Change Request is complete: all Background questions have been addressed, all required tabs have been completed, all approvers have been added, then the CR is ready to be submitted.

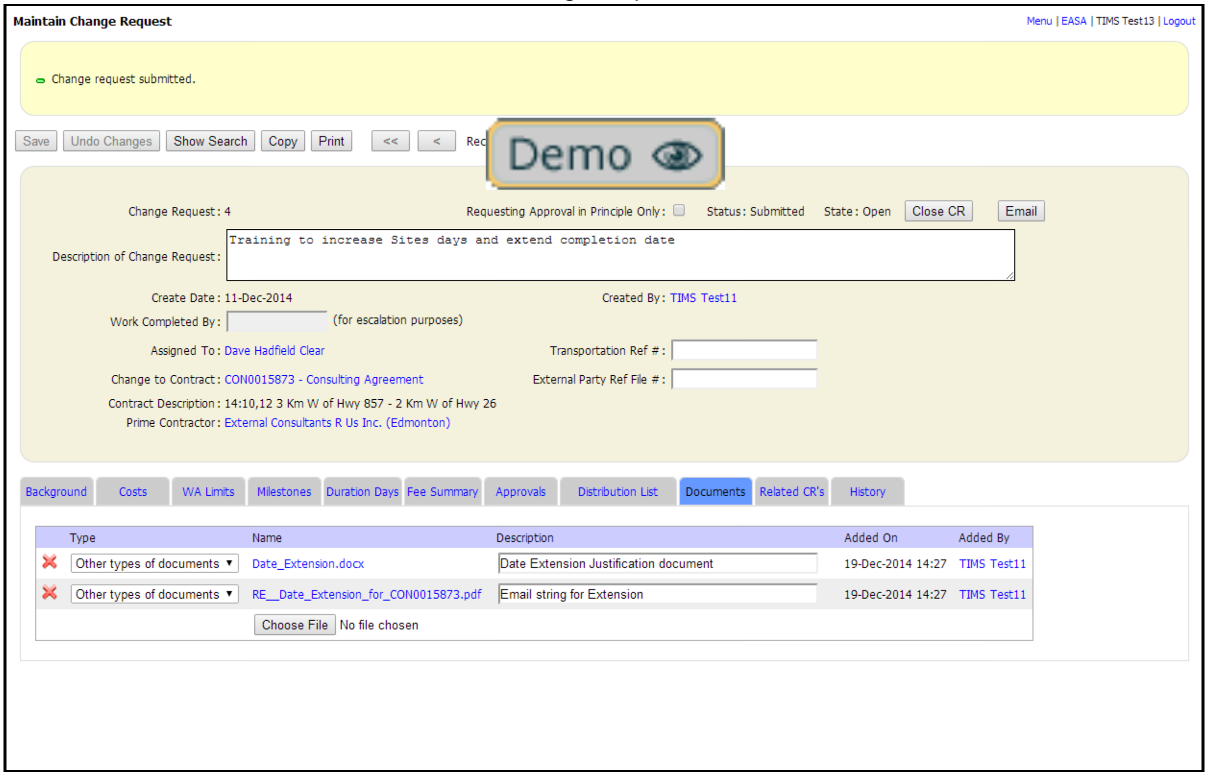
Hint: Only External users with the Submit security role will be able to submit a Change Request.

Figure 23.13 Confirm Submission of Change Request for Approval



Alert! Be absolutely certain that you want to submit the CR and that it is correct. Once a CR has been submitted it can never be canceled.

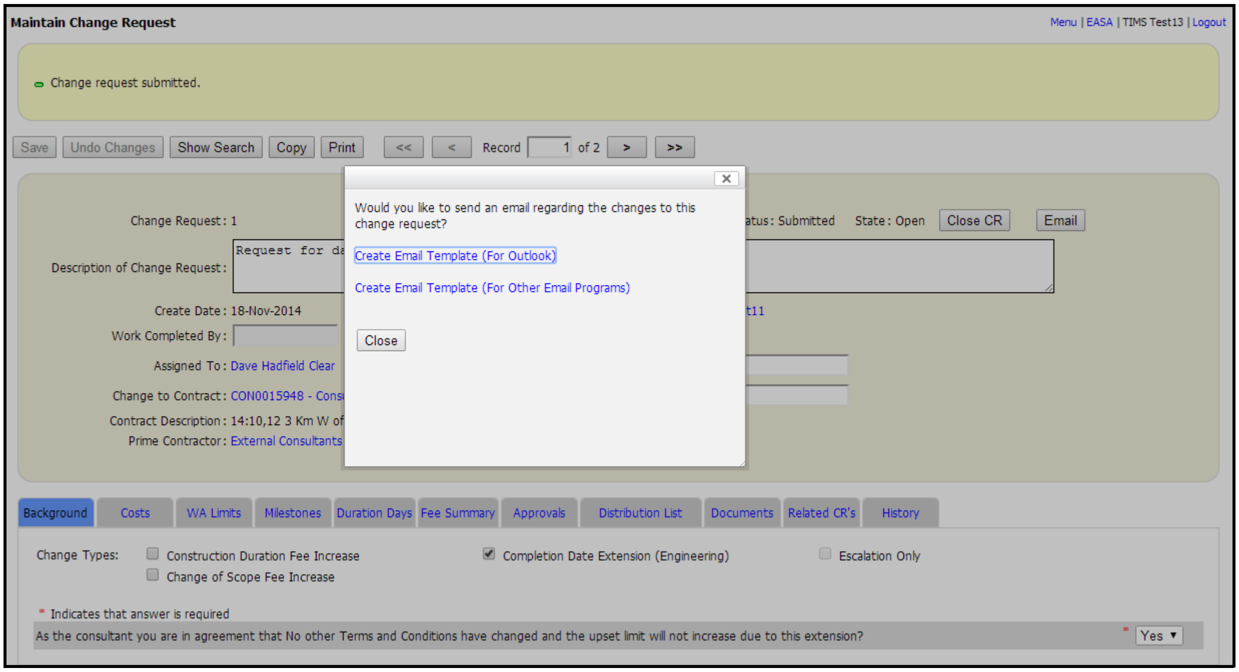
Demo 23.7 Submit a Change Request



How To

1. From the *Maintain Change Request* screen verify that all values are correct and complete
2. Select the **Submit** button.
3. In the *Confirm* dialog box, select the **Yes, submit this change request** button.
4. From the *Send Email* window select the appropriate **Email Template** link for your company's email system.
5. Edit the Email message as necessary and select **Send**.
6. In the *Send Email* window select the **Close** button.
7. Edit the Email message as necessary and select Send.

Figure 23.14 Generate Email



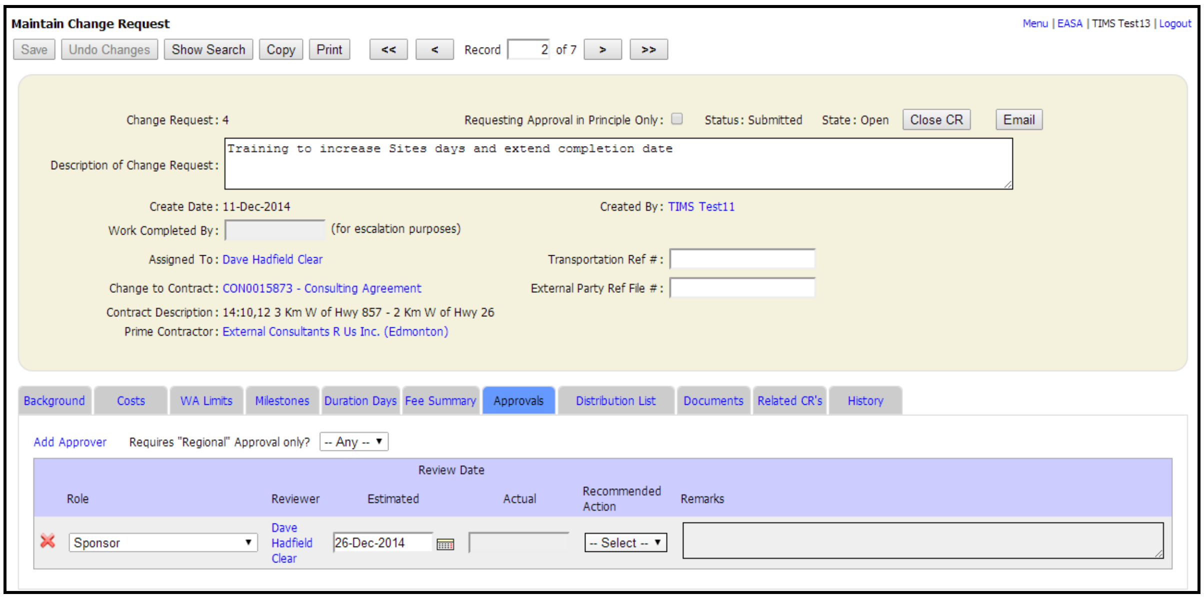
Hint:	You can add more recipients of the email on the address lines (To, Cc). You can type additional text in the body of the email.

Assigned To

PMA Delivery automatically changes the Assigned To value.

- While the CR is being created and up until the time it is submitted the Assigned To value is set to the creator.
- When the CR is submitted, the Assigned To is set to the first Approver.
- When the first approver makes a recommendation and saves their entry the Assigned To is set to the next Approver.

Figure 23.15 Assigned to first Approver



Print Change Requests

Change Requests can be printed. The print creates a PDF version of the Change Request and can include the history of the change request or not.

Figure 23.16 Print Change Request

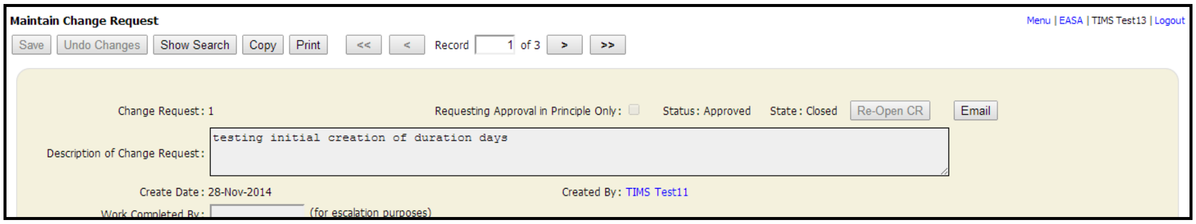
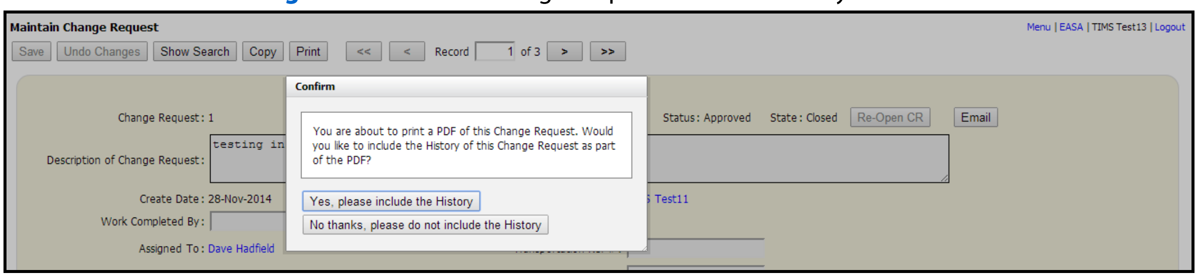
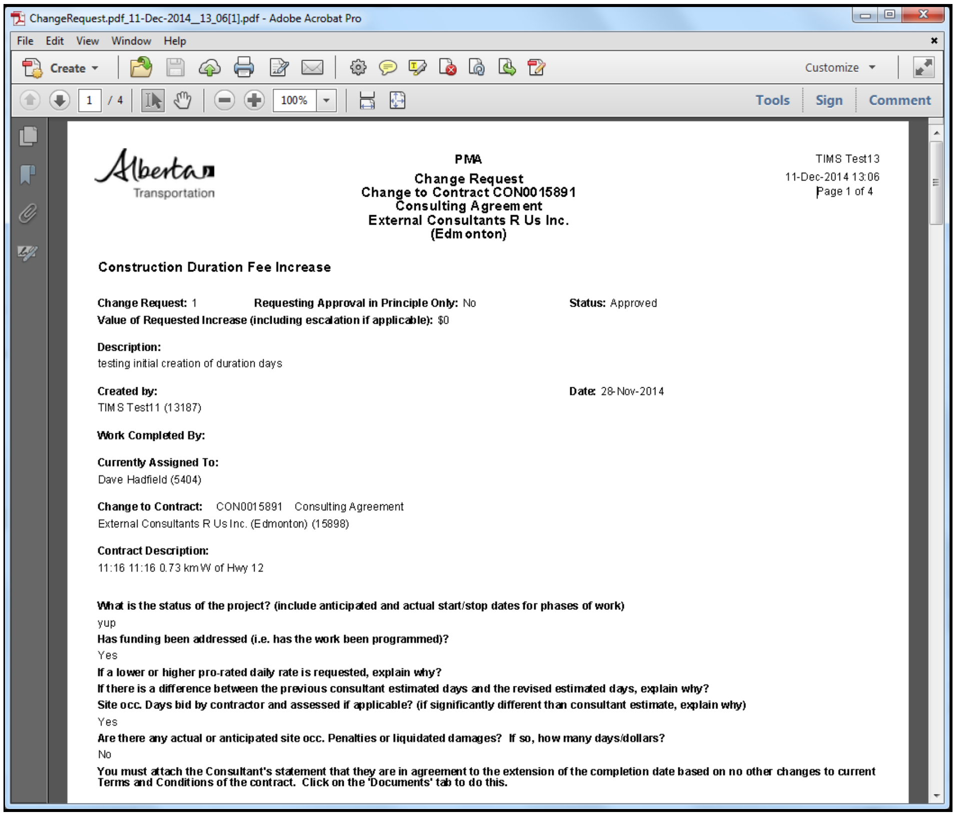


Figure 23.17 Print Change Request - Include History



Hint: Selecting History will include the entries on the History tab as the last page of the PDF.

Figure 23.18 Change Request - Print PDF



Cancel or Close a Change Request

If a Change Request is created by mistake or it is determined later that the Change Request is not required, it can be cancelled or closed. Depending on the Status of the Change Request it can be either Canceled or Closed but not both.

Cancel a Change Request

A change request can only be cancelled if it has never been submitted.

Alert! Once a CR has been submitted it can never be cancelled.

Figure 23.19 Cancel a CR

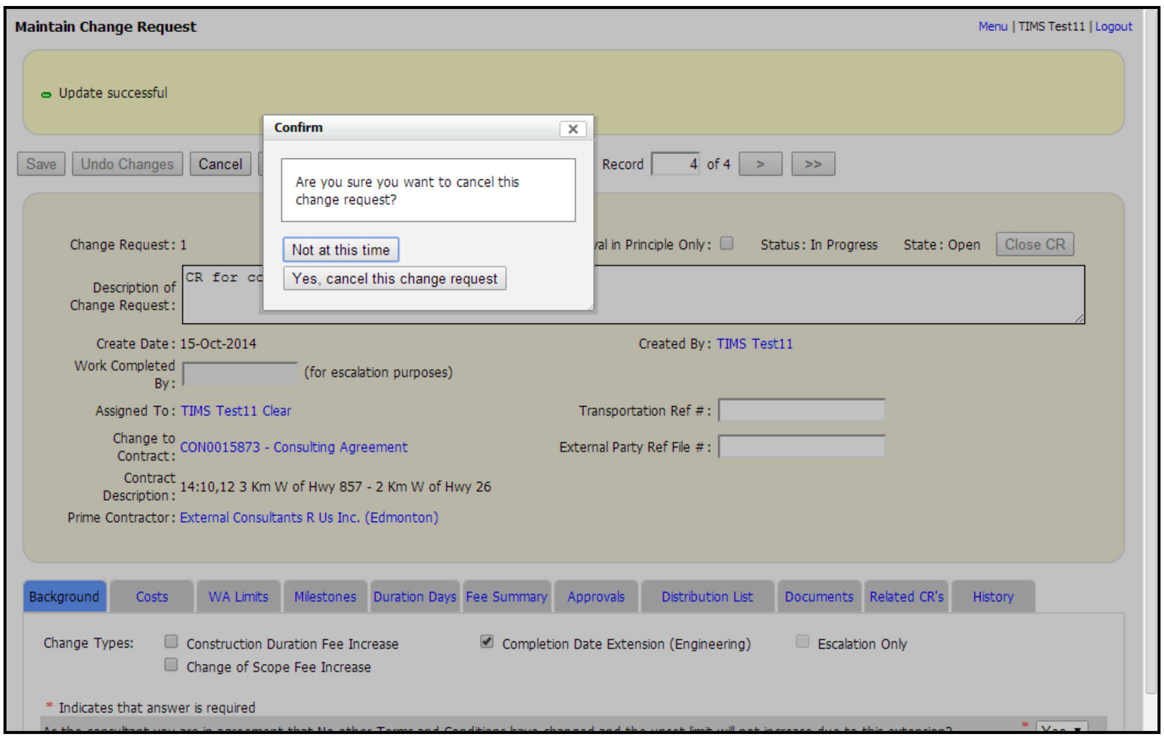
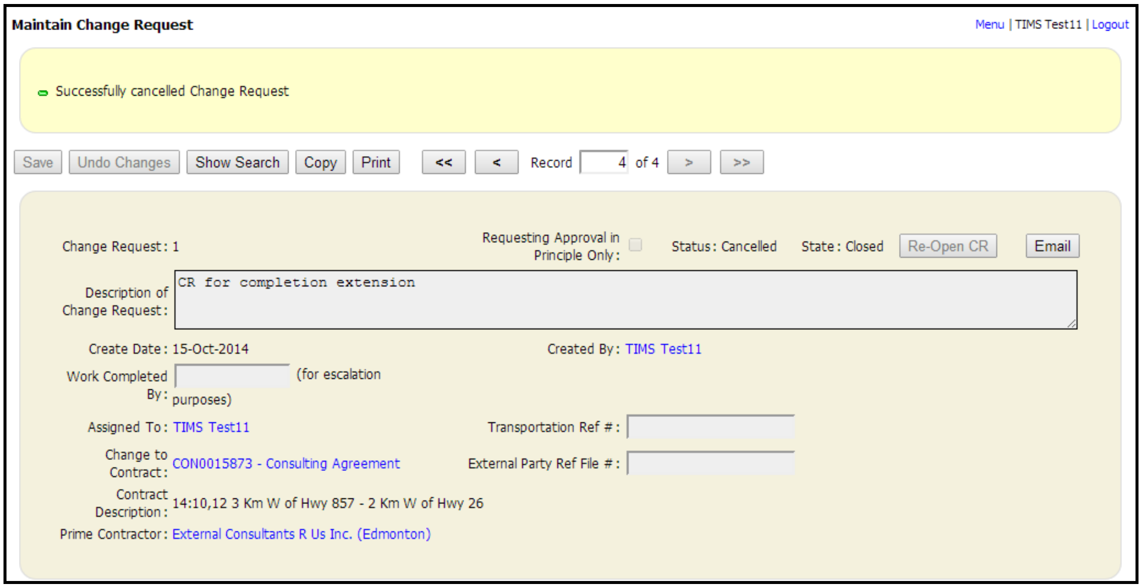


Figure 23.20 Change Request - Cancellation Successful



Close a Change Request

If a Change Request is submitted and later found that it is no longer required, the change request must be Rejected and then Closed.

Alert! Do Not Close a Change Request that has a Status of Submitted.

Figure 23.21 Reject a Change Request

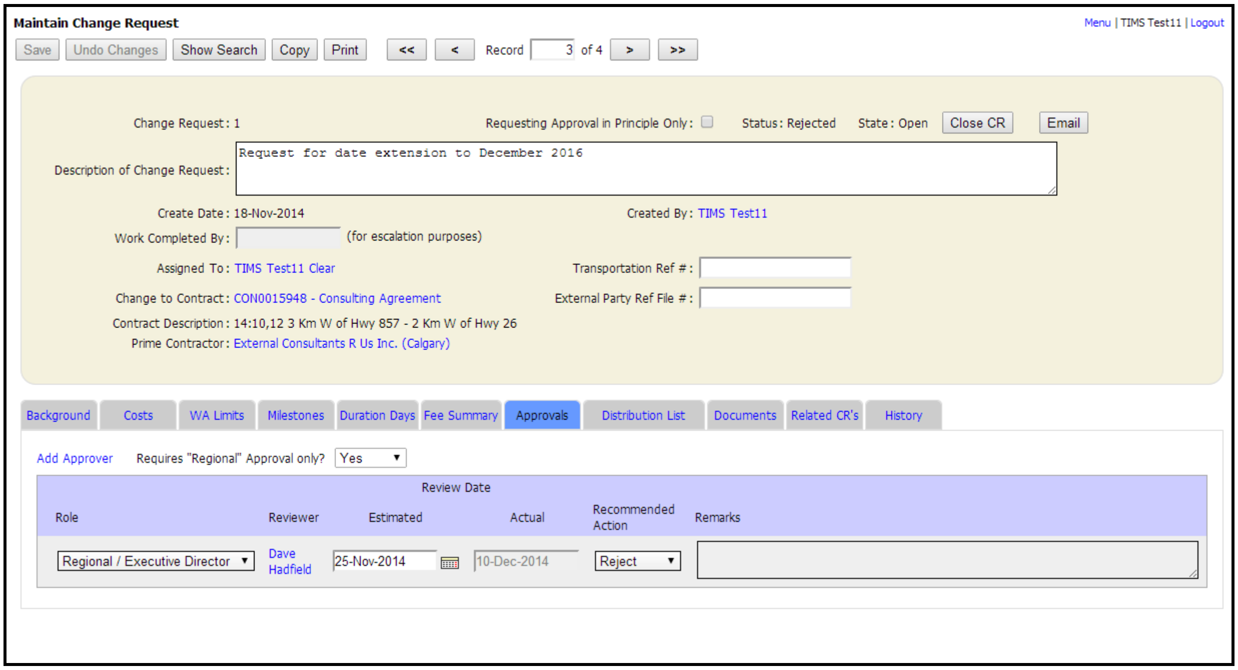
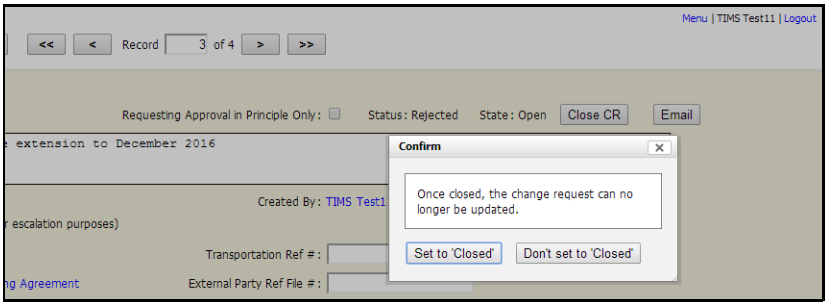


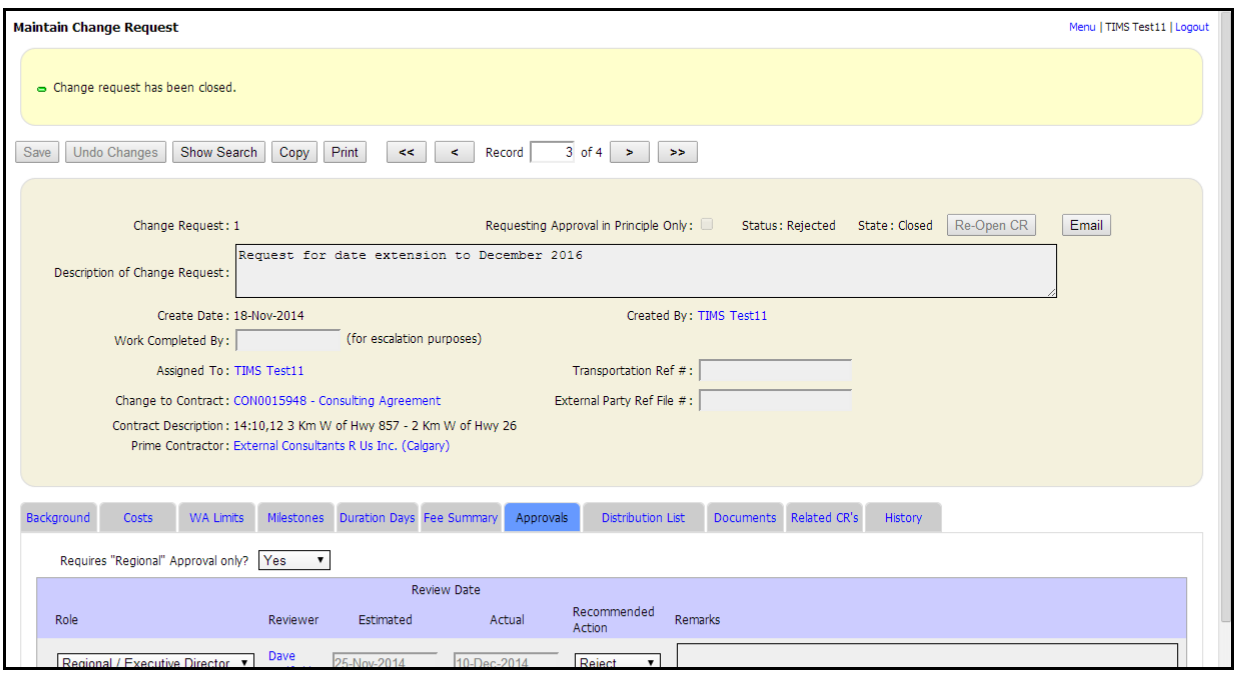
Figure 23.22 Change Request - Confirmation



How To

1. Request that the Approver use the *Approvals* tab, to set the *Recommended Action* to **Reject** the Change Request
2. On the *Change Request* screen click the **Close CR** button.
3. In the *Confirm* window, select the **Set to Closed** button.

Figure 23.23 Change Request - Closed Successfully



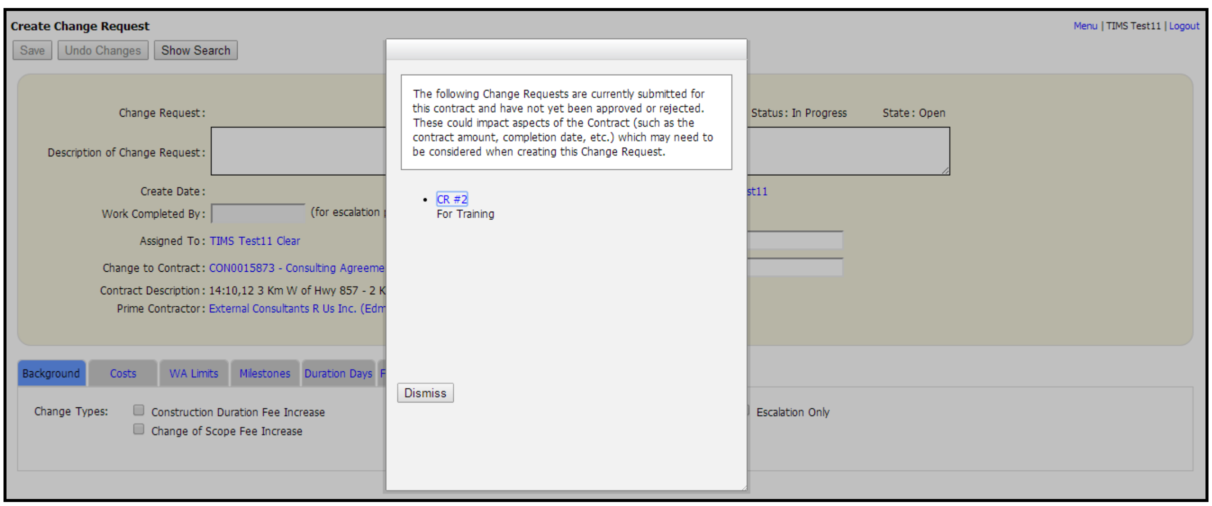
New Change Request - Warning Message

When creating a new change request, you may receive the message:

> " The following Change Requests are currently submitted for this contract and have not been approved or rejected. These could impact aspects of the Contract (such as the contract amount, completion date, etc.) which may need to be considered when creating this Change Request."

This message is generated when a **New CR** is being created on a contract that currently has an outstanding CR with a status of *Submitted*. If you have more than one change request on the go, then this message makes sense and can be explained. If however, there are no other CRs on the go, the reason this message may be displayed is due to an existing CR that has a status of Submitted and a state of Closed. In this instance consider the steps to Reject & Close a CR covered in the section above.

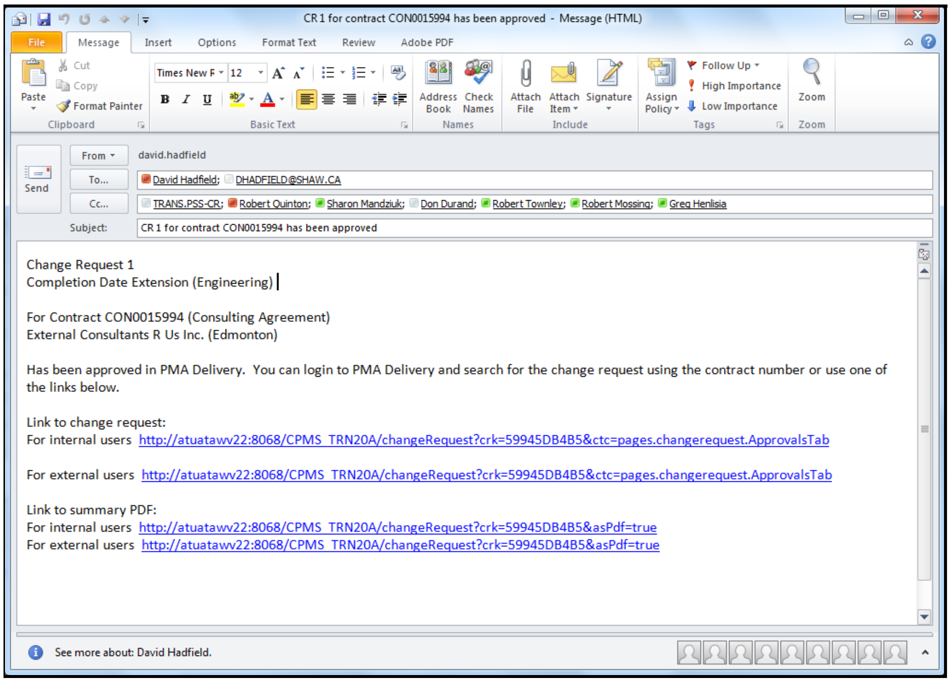
Figure 23.24 New Change Request Warning Message



Approved Change Request

When the last Approver 'Approves the Change Request they are prompted to send an Email. The Email goes to Professional Services Consulting and Programming. IT also goes to each approver involved and to the creator of the Change Request. Figure 23.25 below provides an example of the approved email.

Figure 23.25 Final Approval Email - example



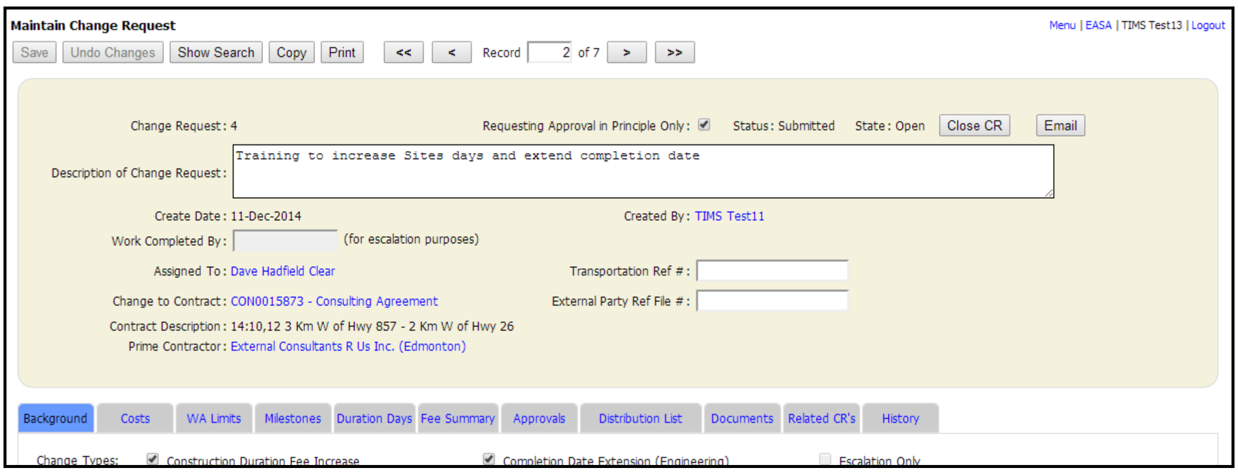
When a Change Request has been Approved in PMA, several updates occur automatically. If the amount of the change request is not zero, the contract amount (Modified Contract Price on the Maintain Contract screen) is automatically changed. If a contract date change is part of the change request, the affected contract milestone date is automatically updated. The PMA/CMS Interface automatically sends the change request information from PMA to CMS as amendments. The amendments reflect the change to the contract amount and contract date.

Approval in Principle Only

An Approval in Principle change request is created exactly the same way as any other Change Request. It is submitted and goes through all required levels of approval. The difference is, the contract is not updated when the AIP receives final approval (i.e. the funds are never allocated and the upset limit is not increased).

Alert! An AIP change request still requires the minimum backup information (attached emails or documents) to justify the request. The CRC will not approve an Approval In Principle if sufficient justification is not provided.

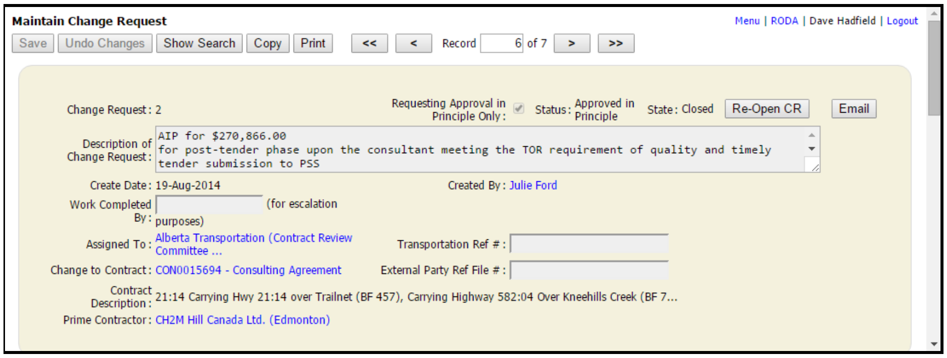
Figure 23.26 Final Approval message for AIP Change Request



If the day comes when the work/funding/dates requested in the AIP are to proceed, a new Change Request is created with all of the same information. As long as the new change request is exactly the same as the AIP (i.e. funding requested) then the new CR will not have to go before the CRC. When you are creating a Change Request that is an acceptance of a previously approved AIP, you need to identify the Approval In Principle (AIP) Change Request# that you are using. The Maintain Change Request screen has a drop down box to make this selection easier.Professional Services, after confirmation of the acceptance CR, will approve it on behalf of the CRC.

When it is time to go ahead with the work that was approved in principle the process is as follows:

Figure 23.27 Copy an Approved in Principle CR



Hint: Copying a Change Request will not 'copy' everything. Only the basic CR information (i.e. Description & Background tab) and some information from the contract are copied.

Figure 23.28 Use the Existing Contract

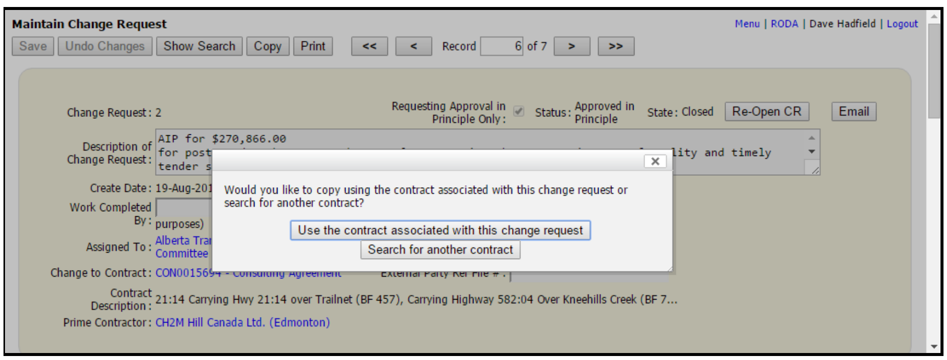


Figure 23.29 Update Change Request Copy

Alert! From the AIP Acceptance for CR drop down select the applicable CR with the original AIP CR.

On the Costs tab enter the Subtasks and dollar amounts necessary. If the costs match the 'approved' AIP Change Request, when the approvals get to the final CRC level, Professional Services (upon verifying that no changes have occurred) will approve the CR on behalf of the CRC.

Hint:	The Costs entered in the AIP would have been estimates. The copy process does not copy the dollar values on the costs tab – forcing the user to ensure that the costs are the most accurate possible.

Alert!	Edit the Description to begin with: 'Acceptance of AIP CR # …' so that PSS Consulting recognizes the change request as acceptance of an approval in principle.

Alert!	If the costs are more than those of the AIP, the new CR will go back before the CRC.

Hint:	You can open the AIP CR and the new CR in two tabs and use the Copy/Paste function to save time.

Chapter 24: External Access

This chapter presents the login process that engineering consultants will need to follow in order to gain access to PMA Delivery.

Topics in Chapter:

Login to PMA Delivery

External users (i.e. engineering consultants) can access PMA Delivery via the extranet site - https://extranet.inftra.gov.ab.ca/inftra_login.html. User IDs are used by individuals (not companies) to login. Once logged in the user selects the PMA Delivery link to access the PMA Delivery Main Menu and the records/data that the user has been granted access to.

Figure 24.1 Alberta Transportation - Extranet Login Site

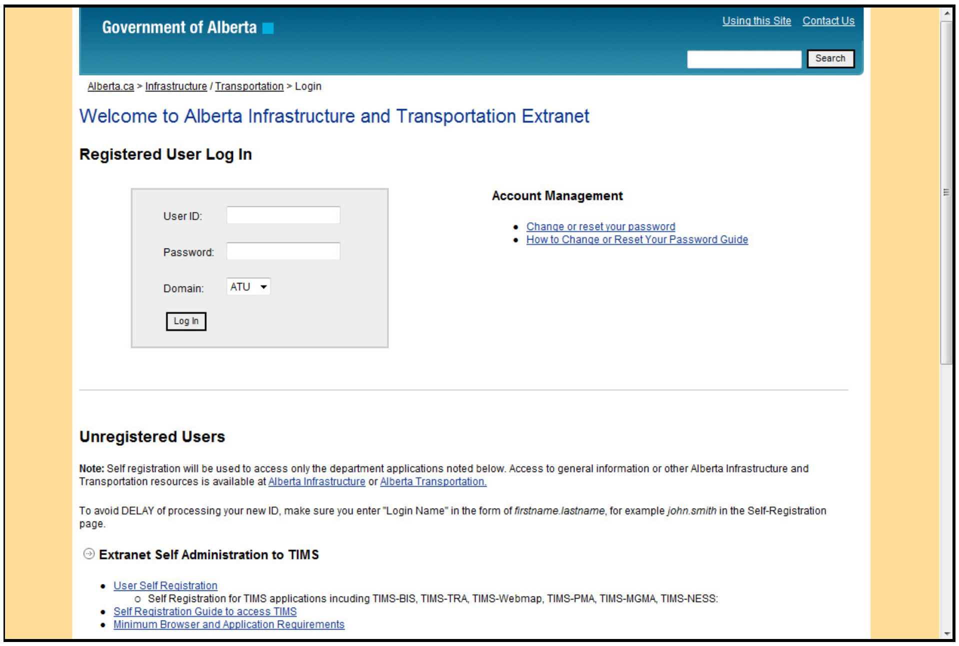
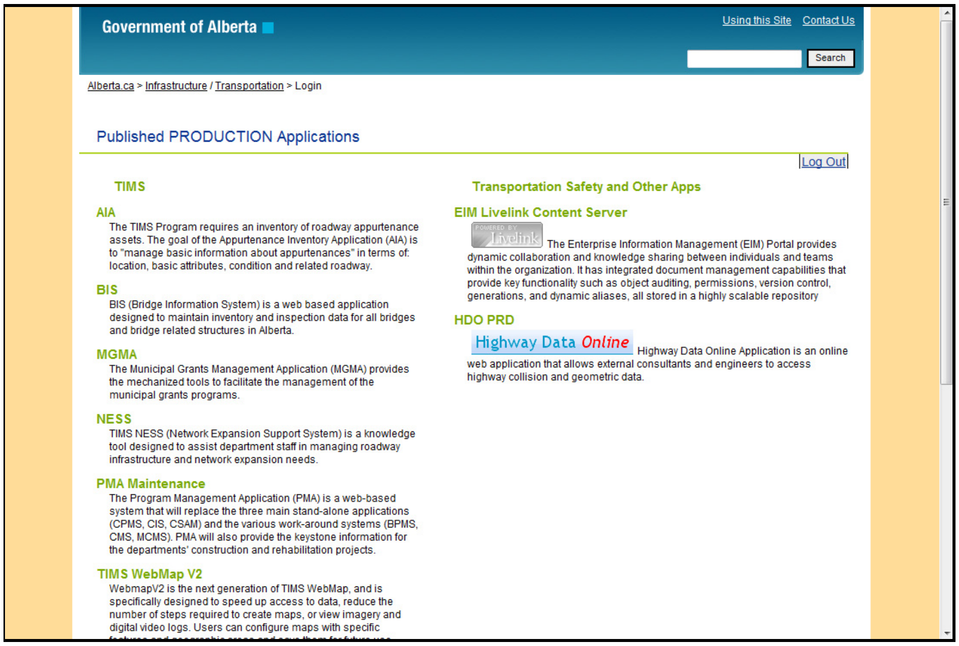


Figure 24.2 Alberta Transportation - Login Successful



Logout of PMA Delivery

Logging out of PMA Delivery simply involves clicking the Logout link (upper right corner) of the PMA Delivery screen and clicking the Log Out link (upper right corner) of the Production Applications screen.

Figure 24.3 PMA Delivery - Logout

Figure 24.4 Alberta Transportation - Logout

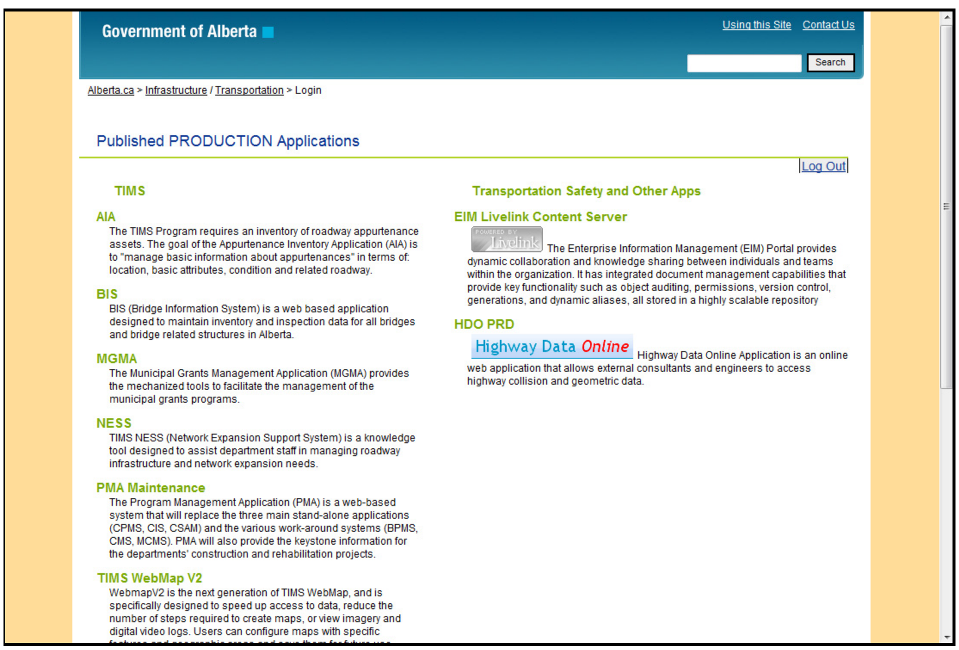


Figure 24.5 Alberta Transportation - Logout Successful