

Client/ Server TRNS.PORT

Training Manual- PES

PES

A) Create Project Header

1. Open Client Server PES-

Click on Icon >

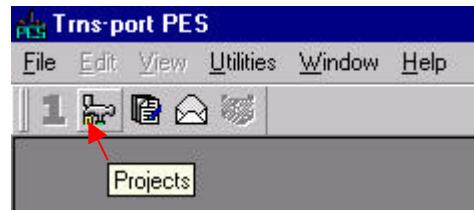


Enter UserID & Password> OK



2. District creates a Project Header for each project being Imported from Estimator.

(Click on Projects Icon-



Right Mouse Click to "Add")



NOTE: You must create "Project Header" before importing Project from Estimator.

Project Header

| Project 2789 | |
|--|--------------------------|
| Page 1 | Page 2 |
| Project Number: 2789 | Alt. Project ID: Z864220 |
| Fed/State Project No.: IM-84-4(003)269 | Status: 3 |
| Description: Juniper RA to Utah State Line WB, Stage 1 | |
| Location: I-84, Cassia County | |
| Unit System: M | CES Job Number: |
| Road Name: Juniper RA to Utah State Line WB, Stage 1 | |
| Route: I-84 | Const. Eng. Pct.: 0.00 |
| Road Section No.: 001010 | Spec. Year: 95 |
| Beginning Termini: 110.6 | District: 48143 |
| Ending Termini: 114.5 | Project Grade: ASPH |
| Beginning Station: | Proj. Work Type: 05 |
| Ending Station: | Project Type: FED |

Several of the field defaults have already been set. Some as examples, some to save you work and some visual aids for filling in the fields. Double clicking on a field OR Tabbing between fields will highlight field so you can overwrite the data.

- ⇒ **Project Number:** Project Key Number (Ex. 2789)
- Alternate Project ID:** Work Authority Number (Ex. Z864220)
- ⇒ **Federal /State Project No.:** Project Number (Ex. IM-84-4(003)269)
- Status:** Code table assigned (Click on arrow to Look Up) (Ex. 3)
- ⇒ **Description:** Project Name (Ex. Juniper RA to Utah State Line WB, Stage 1)
- Location:** Project location Route Number, County Name (Ex. I-84, Cassia County)
- Road Name:** Local Project Name or Same as Project Name (Ex. Juniper RA to Utah State Line WB)
- Unit System:** M – Metric
E – English
- Route Number:** (Ex. I-84)
- Road Section No.:** Segment code (Ex. 001010)
- Beginning Termini:** Beginning project milepost (Ex. 110.6 (**NOTE:** Metric Projects are in Km's))
- Ending Termini:** Ending project milepost (Ex. 114.5 (**NOTE:** Metric Projects are in Km's))
- Beginning Station:** Beginning Station
- Ending Station:** Ending Station
- Const. Eng. Pct.:** Leave at default of 0.00 Const Eng Pct (E&C) for All Categories
- ⇒ **Spec. Year:** 83 – English projects
95 – Metric projects
- District:** ITD Districts Residency Office (Click on arrow to Look Up) (Ex. 48143)
- Project Grade:** Code table assigned, used in reporting (Click on arrow to Look Up) (Ex. ASPH)
- Project Work Type:** Code table assigned (Click on arrow to Look Up) (Ex. 05)
- Project Type:** Code table assigned (Click on arrow to Look Up) (Ex. FED)

Project 2789

Page 1 Page 2

Estimated Amt. of Project: 0.00
 Designer: D4RD
 Date of Estimate: 01/01/2000
 Prices by: D4RD
 Date Priced: 01/01/2000
 Revised by:
 Last Revision: 00/00/0000
 Control Group: D4RD

Type of Road: 2LNI
 Urban/Rural Class: ROLL
 Securities in Lieu of Retainage:
 Longitude of Midpoint: 0 (DDMMSS)
 Latitude of Midpoint: 0 (DDMMSS)
 Field book:

String 1: Num.1: Flag 1: Date 1: 00/00/0000
 String 2: Num.2: Flag 2: Date 2: 00/00/0000
 String 3: Num.3: Flag 3: Date 3: 00/00/0000
 String 4: Code 1: Flag 4: Date 4: 00/00/0000
 String 5: Code 2: Flag 5: Date 5: 00/00/0000

Estimated Amount of Project: Leave this field alone, just press Tab. **Calculated Amount**

This will be filled in for you after the Preliminary Detail Estimate is run.

Designer: Code table assigned ex. D4RD

Date of Estimate: MM/DD/YYYY, not used in processing, but will show up on reports

Priced By: Code table assigned ex. D4RD

Date Priced: MM/DD/YYYY, not used in processing, but printed on some reports

Revised By: Code table assigned ex. HQRD

Last Revision: MM/DD/YYYY, date of last revision

Control Group: Code table assigned automatically when creating the project header, this may be changed later to release control to another group. ex. D4RD

Type of Road: Code table assigned ex. 2LNI

Urban/Rural Class: Code table assigned ex. ROLL

Securities in Lieu on Retainage: This field is not entered until the project reaches the CAS module

⇒ **Longitude of Midpoint:** Used in DSS to create maps, DDD/MM/SS

⇒ **Latitude of Midpoint:** Used in DSS to create maps, DD/MM/SS

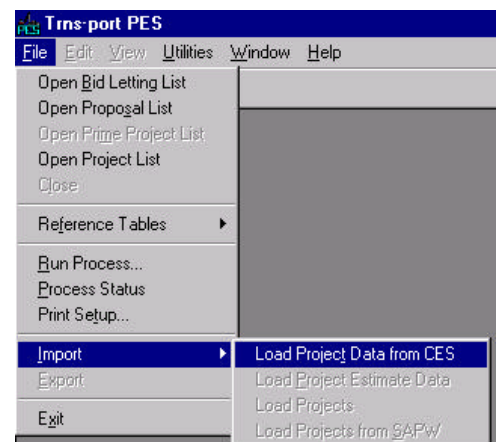
Field Book: Change to **X** to identify that this project will be passed on to WinCaps

3. Import project(s) from Estimator to PES

(File > Import > Load Project Data from CES)

Submit> OK> OK

File> Process Status> Locate Process PESIPRJ? by Date & Time> Right mouse click> Process Files> Review iprjdat.log, iprjdat rej,& iprjdat.sum for errors. Fix errors and reimport as necessary



B) Enter Project Estimate Details

4. District sets up Categories and Funding (Highlight Project > Right Click on Mouse > Select Tabbed Folder Change > Click on Categories Tab & Funding Tab)

NOTE: FED CONST CLASS must be the same on all Categories, Otherwise it will create separate Sections (Categories) and not combine similar items.

5. District creates a Project Level Detail Estimate (Highlight Project > Right Mouse Click > Run Process > Select Generate Preliminary Detail Estimate > OK > Click OK to 2 Dialog Boxes > Then go to File > Process Status > Locate Process Name PESGPDE* by Date Submitted and Queue Time > Right Mouse Click > Process Files > Highlight ProcLog.Txt > Right Mouse Click > View File > Check Error Messages I=Informational, W=Warning, E=Errors > Highlight Output.Txt > Right Mouse Click > View File > Scroll through document > ~~Click Printer Button~~ > ~~Print DON'T PRINT~~)

NOTE: Printer Setup button will kill the program. MAJOR BUG- Working on it.

WORKAROUND: Edit > Select All > Right Mouse Click > Copy > Minimize PES

Open Word > Edit > Paste > File > Page Setup > Paper Size> Click on Landscape > Click on Margins > Set at 0.5,0.5,0.2,0.2 > OK > Edit > Select All > Use Drop Down Font Box to Select Lucinda Console > Use Drop Down Font Size Box to Select size 9 > File > Print

6. District checks and verifies Estimate matches Estimator Totals

C) Enter Proposal Information

7. District creates a Proposal and combines the projects (PESMPRP)

(a) To Add a Proposal Header- Click on Proposal Icon > Right Mouse Click > Add

(b) To Assign Projects to the Proposal- Locate Project > Right Mouse Click > Tabbed Folder Change> Click on Projects Tab

List of available Projects will be at the bottom of the screen. Simply highlight the project(s) and click on the up arrow to "Add Selected Projects".

(c) To assign contract sites to the Proposal- Click on Sites Tab- Right mouse click> Add

NOTE: First Site must be 00

(d) To fill in a Text description for the Proposal- Click on Description Tab

(e) To Generate Proposal Sections and Line Numbers- Click on Items Tab> Then click on button on the bottom of the screen

Review this Screen to check that items are combined correctly.

OR File> Print> Proposal Line Numbers- Section Assignment

NOTE: DON'T PRINT> Proposal Items- Crashes Program- Bug

(f) To provide Proposal Section descriptions- Click on Sections Tab

8. District creates a Proposal Level Detail Estimate- Right Mouse Click> Run Process> Generate Preliminary Detail Estimate> OK> Submit

File> Process Status> Locate Process Name by date and time submitted> Right Mouse Click> Process Files> Open Output.txt> Review and/or Print.

9. District checks and verifies Final Estimate against Estimator Report.

E) Release Project to HQRD

10. District releases control to HQRD- Two Places – Project(s) Headers and Proposals

The first releases the Project Header with the Estimate- Click on the Projects Icon> Locate Project(s)> Right Mouse Click> Change> Change Control Group to HQRD

The second releases the Proposal- Click on the Proposals Icon> Locate Proposal> Right Mouse Click> Change> Change Control Group to HQRD

11. E-mail a note to Associate that control has been released to HQRD with the Project Name and Key Number.