



This document provides directions for importing project estimate data (item numbers and quantities), that was generated using Microsoft Excel, into the Trns*port Proposal and Estimate System (PES) module.

Setting Up the Microsoft Excel Worksheet

- 1) Open a new worksheet in Microsoft Excel.
- 2) In column *A*, row *1*, type in "eiitem". Enter your project item numbers into this column.
- 3) In column *B*, row *1*, type in "iqty". Enter your project quantities next to the corresponding item numbers.

Notes:

- Do not leave any blank cells in either of these columns.
 - Do not type "0" in any of the cells. Every item number must have a quantity.
 - Make sure that all of the cells are completely empty below your last item number. Otherwise, when you import your worksheet, you will have blank rows that you cannot delete in Trns*port. To make sure of this, select the number of the row below your last item number and drag down as far as you think you need to go. **Right click > delete.**
 - You can do the same thing for your columns if needed.
- 4) Select File > Save As...
 - a) Select the path where you would like your document saved.
 - b) Change the "Save as type" drop-down menu to "CSV (Comma delimited) (*.csv)".
 - c) Click "Save".
 - d) Click "Yes" in the information pop-up window and close out your Excel file.

Create a Project in Trns*port (PES)

The next 10 steps are also listed in the "Guide to Building an Estimate in Trns*port" document found on the G-Drive. (G:\Shared\Trnsport Documents\Documentation\Estimates.pdf)

- 1) In PES open Project List (**File > Open Project List, or click Projects icon**)
Tip: Right click anywhere on the Icon Bar and select Show Text to display the name of each icon underneath the icon itself.
- 2) Open Project (**Right-click on project and select Tabbed Folder Change**)
Note: Normally, projects are added to PES from Primavera. If unable to locate the project then add the project to PES. (Right-click on Projects listing and select Tabbed Folder Add.)



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3) Enter General Tab - Page 1 Data

Fields	Entry	Description
Project Number	Required	This number is assigned by finance and if loaded from Primavera will already be populated. Format is 99-999-99.
Alt Project ID	Optional	This is the Primavera Number and is loaded from Primavera.
Spec. Year	Required	Enter '01' when unit type is English or '00' when unit type is Metric. Note: Additional Spec Years may be added in the future. Specification Number A classification number for types of construction items as used in the Specification Book Specification Year Because Trns*port contains projects designed at different times, you cannot change the reference information about each item (such as description and unit). Doing so would change the meaning of projects already in progress. Instead, you can create entirely new reference item lists when necessary. You can distinguish these lists by a spec year.
Fed/State Project No.	Required	For Federal projects this contains the federal number. For State projects this contains the Project Number. If loaded from Primavera will already be populated.
Description line 1	Required	This is the project title and if loaded from Primavera will already be populated.
Description line 2	Optional	Continuation of Description Line 1 if needed.
Location line 1	Optional	
Location line 2	Optional	
Unit System	Required	Defaults to 'E' for English. Can change to 'M' for Metric.
Road Name	Optional	Enter the 911 Address - Road Name.
Route	Optional	Enter the Maintenance Road Number.
Beginning Termini	Optional	Enter the beginning milepoint.
Ending Termini	Optional	Enter the ending milepoint.
Status	Optional	Set to ACTV.
District	Required	Select from drop down list.
Project Work Type	Required	Select from drop down list. Required by CES to use bid history.
Project Type	Optional	Select from drop down list.



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4) Enter General Tab - Page 2 Data

Fields	Entry	Description
Estimated Amount of Project	Do Not Enter	This value will get populated when the "Detailed Estimate" report is run
Designer	Optional	
Date of Estimate	Optional	
Prices by	Optional	
Date Priced	Optional	
Revised By	Optional	
Last Revision	Optional	
Control Group	Required	This will get populated with the value of the user's control group. Remove the '*' from the control group if applicable. If loaded from Primavera this will be set to the assigned responsible manager. Note: To view Control Group codes Select Utilities>System Management>User List right click on the user and select System Identifiers List.
Type of Road	Optional	Select from drop down list
Urban/Rural Class	Required	Select from drop down list
Longitude of Midpoint	Required	Defaults to center of DE: 753000. Can enter actual Longitude.
Latitude of Midpoint	Required	Defaults to center of DE: 390000. Can enter actual Latitude.
String 2	Required by DelDOT	Enter your user id. Required by DelDOT for email notification.

5) Save Project Header **(File > Save, or click Save Folder icon)**6) Enter Counties Tab Data **(Repeat step 6 until all counties have been added)**

- a. Add a blank row **(Right-click on white space and select Add)**
- b. Enter Data

Field	Entry	Description
County or Cong. District Code	Required	Select from drop down list Note: County codes begin with a 'C'
County Name	Required	This value is automatically populated after selecting the above county code
Percent of Project Length	Required	The sum of all counties must total 100%



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- 7) Enter Categories Tab - Page 1 Data **(Repeat steps 7 and 8 until all categories are added)**
Note: If you have any fixed quantity items they must be entered into a separate category titled 'Fixed Quantity'. You must also deselect 'Combine With Like Categories'.
- c. Add New Category (right click on white space and select Add))
 - d. Enter Data from table below
 - e. Click Ok button to complete the category entry.

Field	Entry	Description
Category Number	Required	Assign categories starting with 0001. We will use a separate category for each section (such as for bridge vs. road, or two roads not near each other.)
Category Alternate Code	Optional	Enter a code if category is an alternate of another category (e.g. AA1, AA2, etc). The first character specifies alternate or option (A/O) and the second character indicate the group and the third character indicates the alternate number. Alternates can be set at the item level as well. (Alternate requires bidder to bid all items, Option limits bidder to bid on only one choice)
Category Description	Required	Enter a description up to two lines
Proposal Section Number	Optional	Usually left blank (can be entered to manually control roll up)
Combine w Like Categories	Optional	Usually checked (to roll up item quantities and estimated costs, which are weighted.) Can be unchecked to prevent rollup.
Federal Construction Class	Required	Select from drop down list. If rolling up categories this code must be the same on the categories in order for them to roll up.
Construction Eng. Pct	Optional	
Category Work Class	Optional	Select from drop down list
Federal Work Category	Required by DelDOT	Select from drop down list Required for DelDOT
Category Length	Optional	Calculate distance from beginning to ending termini
Category Width	Optional	For future use
Category Depth	Optional	For future use
Lane Miles	Optional	For future use
Bridge Id	Optional	Entered for bridge structures only Format is county code - id# - optional suffix (i.e. 9-999X)
Bridge Length	Optional	For future use
Bridge Width	Optional	For future use
Number of Spans	Optional	Entered for bridge structures only
Highway Type	Optional	Select from drop down list



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- 8) Save Project Updates **(File > Save, or click Save Folder icon)**
- 9) Enter Funding Tab Data **(Repeat step 4 until all funding has been added)**
- f. Add a blank row **(Right-click on white space and select Add)**
 - g. Enter Data from table below
Note: each Category must have at least one Funding entry
 - h. Click Ok button to complete the funding entry, or click **Add More** button to both complete it and add an additional blank row

Field	Entry	Description
Funding Code	Required	Select from drop down list
Category No	Required	Select from drop down list
Funding Description	Required	Automatically populated after selecting the Funding Code
Participation Percent	Required	This must total 100% for all funding within a category. Note: 100% Federal Funds assume 80/20 participation
Participation Limit	Optional	Enter the maximum dollars that will be paid by the funding source. Leave 0 if no limit
Fund Priority Order	Optional	Order in which funding source will be applied when Participation Limit is reached
Federal Funding	Optional	Enter 'X' if the fund contains federal dollars

- 10) Save Project Updates **(File > Save, or click Save Folder icon)**
- 11) Select "Worksheet" tab.
- 12) To import the .CSV file, select File > Import > Load Worksheet Data.
- a) Locate your Microsoft Excel CSV file and click "Open".
 - b) Click "OK" when the pop-up message appears.
- 13) Continue with step 11 found in the "Guide to Building an Estimate in Trns*port" document skipping *a* and *b* and the *Item Number* and *Estimated Quantity* instructions in the table.