



# DELDOT USER'S GUIDE TO PROJECT ESTIMATES IN P6 EPPM

## Abstract

This document will show the user how find, enter, and update estimates throughout the lifecycle of a project.

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## GENERAL INFORMATION

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### WHERE ARE ESTIMATES ENTERED?

Project Estimates are to be entered on the Expenses tab on 1 of 3 milestones based on the type of estimate:

- Engineers Estimates will use MPD01 - Project Initiation Complete
- Award Estimates will use MCA06 - Award Construction Contract
- Construction Funding increases will use MCN02 - Notice to Proceed (NTP) to Construction Contractor

There is 1 exception to the rule above:

- For projects that are purchasing materials, vehicles or other assets, Programs, or Pass-through type projects that will not PS&E, Advertise, or go to Construction, all estimates or funding will be entered on MPD01 - Project Initiation Complete.

**Note:** For users of the **Paving & Suburban Streets (PSS)** application, please see the [PSS Users](#) section at the end of this manual for specific information regarding estimates.

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### RESPONSIBILITY

The responsibility of who enters estimates in P6 varies based on the sections. As we work to make project updates more consistent, this section will be updated with who is responsible.

## ENTERING/UPDATING AN ESTIMATE

The process for entering or updating a project’s estimate is the same, regardless of the type of project or type of estimate (excluding those projects that use PSS as explained in the Note on page 3). Once the project is open, and the user is on the Activity page, select the appropriate Milestone as identified in the “[Where are Estimates Entered?](#)” section of this manual. For the purposes of this manual, we will be using MPD01:

WBS / Activity	Activity Name	Activity St
<b>Capital Project Categorical Exclusion</b>		
Plan Development		
WBS01	Project Development Summary Activity	Not Star
Plan Development Milestones		
MPD01	Project Initiation Complete	Not Star
MPD02	Survey Plans Complete	Not Star
MPD04	Preliminary Plans Complete	Not Star
MPD06	PD Public Workshop Held	Not Star
MPD10	Semi-Final Construction / RW Plans Complete	Not Star
MPD11	Final RW Plans Complete	Not Star
MPD13	Final Construction Plans Complete	Not Star
Plan Development Activities		
A1000	Submit Project to OPM for PNR Review	Not Star
A1110	Request Survey	Not Star
A1115	Request Deeds & Title Search	Not Star
A1120	Develop Survey Plans	Not Star
A1140	Develop Preliminary Construction Plans	Not Star
A1190	Develop Semi-Final Construction / RW Plans, Cost / Timing Estimate	Not Star
A1220	Develop Final Construction Plans	Not Star
A1250	Plan, Specification & Cost Estimate Submission (PS&E)	Not Star
A1270	Bid Tab Review & Transmit Recommendation Letter	Not Star

  

Expenses				
Expense Item	Expense Category	Document Number	Cost Account	Planned Cost
Construction	CTP Estimate		Construction Estimate	\$0.00
Construction Engineering	CTP Estimate		Construction Engineering ...	\$0.00
Contingency	CTP Estimate		Contingencies	\$0.00
Environmental	CTP Estimate		Environmental Estimate	\$0.00
Professional Engineering	CTP Estimate		PE Estimate	\$0.00
Project Development	CTP Estimate		Project Development Estim...	\$0.00
Right of Way	CTP Estimate		Right of Way Estimate	\$0.00
Salary	CTP Estimate		Salary Estimate	\$0.00
Traffic	CTP Estimate		Traffic Estimate	\$0.00
Utility	CTP Estimate		Utility Estimate	\$0.00

From the Expenses tab, you only need to update 3 columns: Expense Category, Document Number, and Planned Cost. Below are explanations of each:

**Expense Category**: This is the estimate version (CTP (aka Initial), Preliminary, Semi-Final, Final, Award, etc..). **During Design**, on MPD01, this column will be changed based on when the estimate is updated at Initiation or PNR (CTP Estimate), Preliminary Plans (Prelim Estimate), Semi-Final Plans (Semi-Final Estimate), and Final Plans (Final Estimate). **At Award**, on MCA06, this column will always be set to Award Value. **During Construction**, on MCN02, this column will always be set to Final Estimate.

**Note**: When updating the Estimates during Construction, the Construction Project Manager should be

**Document Number**: This column is the first **State Fiscal Year** of spend for that particular line item. Once the line item is updated at PNR, this column should not be changed for any reason, unless requested by Finance. This should be the **4 digit year** (i.e. 2017). **Do not use** FY17, 17, or any other value in this field, or the estimate information will not flow to FACTS.

**Planned Cost**: This column is the amount of the estimate for that line item.

Once you've update each of these columns, remember to click the Save button. The estimate information should flow to FACTS immediately.

**Note**: There are a couple of line items that are not listed in the screenshot above that are common. In some cases, you have to manually add these to the Expense tab. Below is an explanation of each and how you should fill out the Expense Item and Cost Account columns:

- Program Funding
  - This line item should only be used on projects that are created for funding a Program.
  - The Expense Item column should read Program Funding
  - The Cost Account column should be set to PROG - Program Funding
- Railroad
  - This line item is used on Railroad projects and when special funding is required for Railroads and Finance requests a separate line item
  - The Expense Item column should read Railroad
  - The Cost Account column should be set to RR - Railroad Estimate
- Procurement
  - This line item is used for projects that are need for funding a procurement of materials, vehicles, etc...
  - The Expense Item column should read Procurement
  - The Cost Account column should be set to PROCURE - Procurement Estimate

There are other line items that are also not listed in the screenshot above that should only be used when requested by Finance.

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## ADDITIONAL REQUIREMENTS

In addition to updating the Estimate information on the appropriate milestone as explained above. The user should also update the Project's Funding Comments notebook topic at the EPS level.

This can be found by highlighting the project while in the EPS view and clicking on the Notebooks tab. For more information on this process, see the appropriate section in the [P6 Users Training Manual](#).

## ESTIMATE INFORMATION FOR PSS USERS

PSS will automatically update the estimate lines for Construction, Construction Engineering, Contingency, and Traffic during Design and Construction. The user **SHOULD NOT** manually update P6 for those line items during Design or Construction. Any other estimate line items will need to be manually updated in P6 as explained in this manual.

In addition, the Award amounts for projects that are in PSS **DO** get manually updated in P6 and not in PSS.

Lastly, it is recommended that after updating the Traffic line, the person responsible for updating PSS should double check the Traffic line item in P6 as it is known to sometimes not flow from PSS into P6.