

# Commonwealth of Virginia



## Virginia Department of Transportation (VDOT)

### Project Management Office integrated Project Manager (iPM) User Guide

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## integrated Project Manager (iPM)

### Overview

The integrated Project Manager (iPM) provides a central management system for project development information. In addition to basic location and status information, iPM also includes division-specific comments, project contacts, project documents, meeting dates, project schedule, and action items.

The screenshot displays the iPM Project Search interface. At the top, there is a navigation bar with the Virginia Department of Transportation logo and the slogan "We Keep Virginia Moving". The main header includes "Integrated Project Manager" and links for "Q & A", "IT Support", "User's Guide", and "About". Below the header are three buttons: "Project Search" (highlighted), "iPM Reports", and "myiPM".

The search filters section includes:
 

- District:** A dropdown menu set to "All Districts".
- Counties:** Radio buttons for "Counties" (selected), "Res.", and "Cities/Towns". A dropdown menu set to "All Counties".
- Road System:** A dropdown menu set to "All Road Systems".
- Projects:** A dropdown menu set to "Projects".

Below the filters are input fields for "Route", "State Proj. #", and "UPC", along with "Search" and "Reset" buttons. The search results are displayed in a table titled "Project Search Results (4217 projects found)".

State Project #	Description	Route	UPC	District	Ad Date	Proj. Manager
	Norfolk Harbor Deepening		70485	Hampton Roads		
	At Route 627 (Phase II)	0095	70454	Fredericksburg		Richard Spurlock
0000-001-581	GUARDRAIL IMPROVEMENTS	0000	94128	Hampton Roads	4/13/2010	Mark Winslow
0000-034-R47	Grade, Drainage & Pave (Connector Rd)	0000	91847	Staunton	5/14/2012	Dwight Hawkins
0000-042-715	Plant Mix - Hanover	0000	89436	Richmond	12/11/2007	Carol Williams
0000-053-939	Mill/pave on primary, secondary routes in Loudoun County	0000	89378	NOVA	4/1/2008	Allison Richter
0000-053-971	ARRA - Loudoun Misc. LED Signals/Ped Countdowns/Power Sources	0000	94638	NOVA	2/9/2010	Thomas Folse
0000-053-973	ARRA - Loudoun Misc. Install UPS for Major Signals	0000	94640	NOVA	2/9/2010	Thomas Folse
0000-053-974	ARRA - Loudoun Misc. Upgrade/Install Pavement Markers	0000	94641	NOVA	2/9/2010	Thomas Folse
0000-076-963	Mill and Paving Overlay, Prince William County	0000	89377	NOVA	4/1/2008	Allison Richter
0000-088-593	VRE Commuter Rail Station in Spotsylvania	0000	93066	Fredericksburg		
0000-108-R67	Park Avenue Extension	0000	91853	Lynchburg	6/1/2010	Stanley Murphy
0000-108-R71	Widen Memorial Dr. at Country Club Court/ L. & R. Turn La.	0000	91865	Lynchburg	1/1/2010	Stanley Murphy
0000-111-236	Virginia Central Railway Trail, Fredericksburg	0000	91174	Fredericksburg	8/12/2010	Eric Vogel
0000-111-249	GW Ride Connect Marketing	0000	94027	Fredericksburg		Richard Spurlock
0000-114-199	Bridge street over Salters Creek VA Str. 8009	0000	93081	Hampton Roads	12/15/2014	Rick Csernelabics
0000-131-707	Fentress Airfld Rd over Pocaty Creek Va struc 8017	0000	85954	Hampton Roads		Kendal Walus
0000-962-026	DISTRICTWIDE CULVERT FLOWLINE REPAIRS	0000	89985	Salem	2/24/2009	Jeffrey Echols
0000-962-031	FY08 DISTRICT BRIDGE CLEANING CONTRACT	0000	89991	Salem	2/26/2008	Robbie Williams
0000-962-032	BP-2A-08 PAINT CONTRACT	0000	89992	Salem	3/25/2008	Robbie Williams

At the bottom of the table, there are navigation arrows and a page indicator "[ 1 ] of 211".

Figure 1: iPM Project Search screen

## Levels of User Permissions in iPM

Users are categorized into different levels with permissions to perform the functions listed below.

### Guest –

- View project details
- Download estimates
- Download documents, images & videos

### Team Member –

- Guest Permission, Plus:
- Upload documents, images & videos
- Document division comments
- Update schedule for applicable functional area

### Estimator – across all projects in District–

- Team Member Permission, Plus
- Initiate PD-1 process
- Upload estimates
- Select recommended estimate
- Update award estimate
- Update split estimate screen

### Project Manager –

- Team Member Permission, Plus
- Initiate PD-1 process
- Select recommended estimate
- Update award estimate
- Update split estimate screen
- Delete documents, images & videos
- Edit project information
- Manage schedule
- Build team (internal & external members)
- Assign action items
- Set 5 CEP milestone meetings

### District Project Management Office –

- Project Manager access across all projects in District and assign Project Managers

## Initial Screen

The initial page of iPM is the Project Search screen. From here, you can locate any project within the system using the filters and search criteria at the top of the page.

The search results show State Project Number, Description, Route, UPC, District, Advertisement Date and Project Manager. The list can be sorted by clicking on any one of the column headers - State Project Number, Description, Route, UPC, District, Advertisement Date or Project Manager.



Figure 2: Filters & Project Search

The project filters include District, Counties, Residencies, Cities/Towns, and Road System to identify a project by location. The system also has filters by Project to select by record type or development phase.

**Table 1: Projects filter options:**

Filter	Description
All	All projects
Projects	Projects with a record type of 'Project'
Budget	Projects with a record type of 'Budget'
Development Projects	Projects under development (status code < 30) (default)
Construction Projects	Projects under construction
SYP	Projects included in the Six-Year Program

The project list can be reduced using the Projects filters.

The search criteria include Route, State Project Number and UPC Code.

	<i>Note: UPC is the identification number that the FMSII system assigns to projects. This number is used across the enterprise to identify projects. It is unique to the project, and will never be assigned to any other project.</i>
---	--



**Figure 3: iPM Search Criteria**

You may search by Route number, State Project number, or UPC code by entering data in the appropriate fields, and click **Search** to view the result. Clicking **Reset** will clear all entries from the search fields.

	<i>Note: You may also search by UPC from the Project Details page (see Search Bar page 7)</i>
---	---



**Figure 4: iPM Expanded Search Criteria**

You may expand your search capability to include Description and Project Manager by clicking  on the right.

## Project Search Results

The next part of the page is the Projects Search Results, comprised of a Totals Bar, Listing, and Page Navigation.

### Totals Bar

The total number of projects meeting the search criteria is shown in the blue bar.



**Figure 5: Projects Search Results - Totals Bar**

## Project Search Results

This allows the user to sort the list below it in ascending or descending order. Only one field may be sorted at a time.

This page element is a list of all the projects that satisfy the filter criteria set in the controls above.

To view the details of a particular project, click on the item in the Search Results List.

State Project #	Description	Route	UPC	District	Ad Date	Proj. Manager
0064-002-F07	RTE 64 - UPGRADE SEWER SYSTEM - PE ONLY EB REST AREA	0064	14656	Culpeper		Jacob Porter
0064-002-F07	RTE 64 - UPGRADE SEWER SYSTEM - PE ONLY WB REST AREA	0064	52338	Culpeper		Jacob Porter
0064-043-F18	RTE 64 - PAVEMENT REHABILITATION & WIDENING - PE ONLY	0064	12799	Richmond		Janet Hedrick
0064-063-F08	RTE 64 - PE FOR PAVEMENT REHAB & WIDENING (SEE LINEAGES)	0064	11800	Richmond		Latheasha Hinton
0064-114-F12	HAMPTON ROADS THIRD CROSSING - (PE ONLY)	0064	12834	Hampton Roads		Daniele Noland
0064-131-F11	RTE 64 - SOUND WALL STUDY	0064	78725	Hampton Roads		Conrad Scott
0264-122-F08	RTE 264 - PE FOR FEASIBILITY STUDY FOR HOV RAMP & LANES	0264	14891	Hampton Roads		Robert Pugh
0264-122-F08	RTE 264 - WIDEN FOR HOV LANES	0264	15791	Hampton Roads		Robert Pugh

**Figure 6: Project Search Screen - selecting the project**

The following details are displayed:

State Project # ..... The state project number is 10 alphanumeric characters long, with a format of XXXX-XXX-XXX (Route, County/City, Section).

Description..... A textual narrative briefly describing the project (for quick identification and reference purposes)

Route..... The Route number of the road where the project will take place. This value is used in determining the state project number.

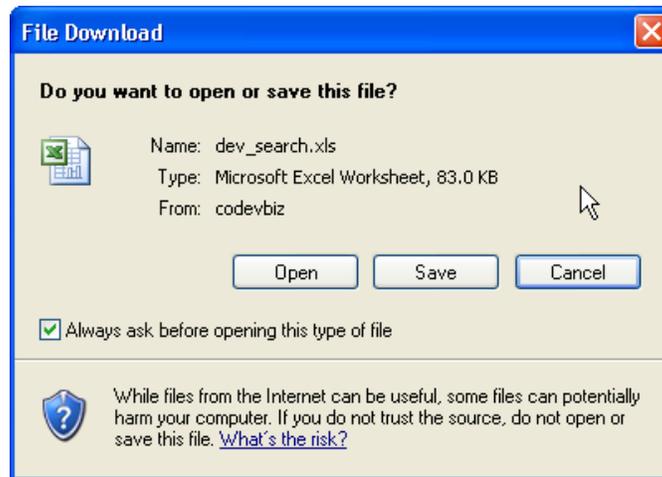
UPC..... The identification numbers the FMSII system assigns to projects. This number is used across the enterprise to identify projects. It is unique to the project, and will never be assigned to any other project.

District ..... The primary construction district responsible for a project.

Ad Date ..... The Ad date is the date that the project advertises. This date must be the same as the Pool – CN Start date, and the same as the Schedule – planned end date for Activity 80, unless an actual end date exists. If an actual end date for Activity 80 exists, then this date becomes the ad date.

Proj. Manager..... Project Manager - The person named to be responsible for the management of the project

If you select any District using the first filter, you may export the results of the search to MS Excel by clicking  to the right of the search bar. A dialog box similar to the one below will appear.

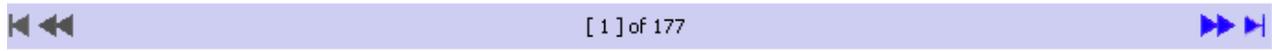


**Figure 7: Export to MS Excel**

Select Open, Save or Cancel as appropriate.

### Page Navigation

Long lists of projects are broken up into pages to make it easier for the user to browse. Below the project list is a paging control that will allow the user to navigate through the project result set.



**Figure 8: Page navigation bar**

## iPM Project Details Screen

The screenshot displays the iPM Project Details Screen for project UPC 12757. The interface includes a navigation bar with icons for POOL, iPM, PCES, SCHEDULE, SYP, DASHBOARD, and MAP. A search bar is located at the top right. The main content area is divided into sections: Summary, Project Details, Location, Programming, Construction Project Events, and Estimates & Expenditures. Each section contains a table of project data.

Project Information				Project Documents		Communication & Divisions		Action Items	
<b>Summary</b>									
UPC	12757			State Project #	0614-080-306,P101, R201, C501, B683				
Project Purpose	replace substandard bridge with new structure and realign approaches			Sponsor	<a href="#">Jeffrey Echols</a>				
Project Manager	<a href="#">Sandra Elliott</a>			Scope of Work	BRIDGE REPLACEMENT				
Description	RTE 614 - BRIDGE REPLACEMENT								
<b>Project Details</b>									
Traffic Count				Count Date					
Length	0.049 mi			Road System	Secondary				
<b>Location</b>									
District	Salem			County	ROANOKE				
Town/City				Residency	Salem				
Route	0614			Street Name	BOONES CHAPEL RD				
From	BRIDGE AND APPROACHES OVER BRANCH OF BACK CREEK			To	(0.25 MILE NORTH ROUTE 677)				
<b>Programming</b>									
Federal Oversight	No			Construction Fund Source	S				
Fund Type	State			Sequential Number	306				
VTA_PTF	No			VTA_GF	No				
Order Number(s)	A11			FHWA 534 Data Number	16009				
Schedule Type	SECONDARY - ONE HEARING DESIGN			Area Location	Rural				
Functional Classification	RURAL LOCAL			Accomplishment	CONTRACT				
Federal System	NON NHS			Project Status	CLOSED (CLAIMS PAID)				
<b>Construction Project Events</b>									
Contract Letting	12/19/2007			Awarded	1/31/2008				
Construction Started	5/28/2008			Construction Completed	9/12/2008				
Estimated Construction Completion	9/12/2008			Contract Execution	2/14/2008				
<b>Estimates &amp; Expenditures</b>									
	PE		RW		CN		Total		
PCES Recommended Estimate (Expenditures)	\$425,883		\$21,245		\$333,445		\$780,573		
Expenditures (2/22/2009)	\$425,883		\$21,245		\$333,445		\$780,573		
Live SYIP Estimate	\$425,883		\$21,245		\$333,445		\$780,573		

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Figure 9: Project Detail Screen

## Application Bar



Figure 10: Application Bar

The iPM Project Details Screen has an application bar located just below the VDOT logo to indicate to the user the current application . Clicking on any other application button will navigate the user to the application selected.

## Search Bar



Figure 11: Project Details Screen - Search Bar

The search bar contains an area for Project Search and UPC. By clicking  **Project Search**, the user is taken to the Initial iPM Project Screen (see Initial Screen, page 2) where a more detailed search may be performed.

Users can perform a UPC search from the Project Details screen by entering the UPC  and click , to the right of the field.

## Project Details Tabs

The project details are divided into four screens:

- Project Information,
- Project Documents,
- Communication and Divisions, and
- Action Items

Use the tabs at the top of the page (under the iPM tab) to navigate between these screens.



Figure 12: Project Details Tabs

Common to all screens accessed by the Project Details Tabs are the Project Summary, and the Show/Hide Feature

## Summary

The screenshot shows the iPM interface for the Virginia Department of Transportation. At the top is the logo 'VDOT We Keep Virginia Moving' and the title 'Integrated Project Manager'. Below the logo are navigation links: 'Q & A', 'IT Support', 'User's Guide', and 'About'. A row of buttons includes 'POOL', 'iPM', 'PCES', 'SCHEDULE', 'SYP', 'DASHBOARD', and 'MAP'. A 'Project Search' field contains 'UPC: 12757'. Below this is a navigation bar with 'Project Information' (highlighted), 'Project Documents', 'Communication & Divisions', and 'Action Items'. A 'Summary' section is expanded, showing a table of project details.

Summary			
UPC	12757	State Project #	0614-080-306,P101, R201, C501, B683
Project Purpose	replace substandard bridge with new structure and realign approaches	Sponsor	<a href="#">Jeffrey Echols</a>
Project Manager	<a href="#">Sandra Elliott</a>	Scope of Work	BRIDGE REPLACEMENT
Description	RTE 614 - BRIDGE REPLACEMENT		

Figure 13: Project Detail Summary

The top row of boxes are links to other systems that are used by Project managers in the development of a project.

Pool is all of the programming information. It contains several pages of data entry and maintenance functions as well as a revision system to handle data change requests from the field.

iPM is the integrated system that includes division-specific comments, project contacts, project documents, meeting dates, project schedule, and action items.

PCES (Project Cost Estimating System) is the estimating tool used during project development. PCES collects and stores estimates for specific projects in the Six Year Improvement Plan (SYIP).

Schedule is a separate application that is linked with iPM and the Project Pool and is divided into a view page and an edit page. Schedule is the location where the development tasks are shown and documented.

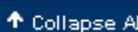
SYP displays the status of the project against the six year plan adopted by the Commonwealth Transportation Board annually. It does not link to the current or active SYP.

Map is an interactive map of Virginia. It does not link to the project.

The Summary provides UPC, State Project Number, Project Purpose, Sponsor, Project Manager, Scope of Work and Description.

### Show/Hide Section details

The default view of each section is in the expanded view to show all details as indicated by the upward pointing arrow  to the right of all blue section title bars.

The user may expand or collapse all sections by clicking  . Each section may be collapsed, or again expanded by clicking the arrow. A collapsed section will display a downward pointing arrow . This functionality allows the user to show or hide each section.



↓ Expand All ↑ Collapse All			
<b>Summary</b> ↑			
UPC	12757	State Project #	0614-080-306,P101, R201, C501, B683
Project Purpose	replace substandard bridge with new structure and realign approaches	Sponsor	<a href="#">Jeffrey Echols</a>
Project Manager	<a href="#">Sandra Elliott</a>	Scope of Work	BRIDGE REPLACEMENT
Description	RTE 614 - BRIDGE REPLACEMENT		
<b>Project Details</b> ↑			
Traffic Count		Count Date	
Length	0.049 mi	Road System	Secondary
<b>Location</b> ↑			
District	Salem	County	ROANOKE
Town/City		Residency	Salem
Route	0614	Street Name	BOONES CHAPEL RD
From	BRIDGE AND APPROACHES OVER BRANCH OF BACK CREEK		To (0.25 MILE NORTH ROUTE 677)
<b>Programming</b> ↓			
<b>Construction Project Events</b> ↓			
<b>Estimates &amp; Expenditures</b> ↓			

} Expanded

} Collapsed

[Home](#) | [Pool](#) | [PCES](#) | [iPM](#) | [Schedule](#) | [Funding](#) | [CERS](#) | [SYP](#) | [SSYP](#) | [Dashboard](#) | [PCFA](#)  
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Figure 14: Show / Hide functionality

## Project Information

### Project Information

In addition to the Summary, the **Project Information** screen shows relevant project information including sections for Project Details, Location, Programming, Construction Project Events, Estimates and Expenditures.

Project Information		Project Documents		Communication & Divisions		Action Items	
<a href="#">↓ Expand All</a> <a href="#">↑ Collapse All</a>							
<b>Summary</b> ↑							
UPC	12757	State Project #	0614-080-306,P101, R201, C501, B683				
Project Purpose	replace substandard bridge with new structure and realign approaches		Sponsor	<a href="#">Jeffrey Echols</a>			
Project Manager	<a href="#">Sandra Elliott</a>		Scope of Work	BRIDGE REPLACEMENT			
Description	RTE 614 - BRIDGE REPLACEMENT						
<b>Project Details</b> ↑							
Traffic Count				Count Date			
Length	0.049 mi		Road System	Secondary			
<b>Location</b> ↑							
District	Salem		County	ROANOKE			
Town/City			Residency	Salem			
Route	0614		Street Name	BOONES CHAPEL RD			
From	BRIDGE AND APPROACHES OVER BRANCH OF BACK CREEK		To	(0.25 MILE NORTH ROUTE 677)			
<b>Programming</b> ↑							
Federal Oversight	No		Construction Fund Source	S			
Fund Type	State		Sequential Number	306			
VTA_PTF	No		VTA_GF	No			
Order Number(s)	A11		FHWA 534 Data Number	16009			
Schedule Type	SECONDARY - ONE HEARING DESIGN		Area Location	Rural			
Functional Classification	RURAL LOCAL		Accomplishment	CONTRACT			
Federal System	NON NHS		Project Status	CLOSED (CLAIMS PAID)			
<b>Construction Project Events</b> ↑							
Contract Letting	12/19/2007		Awarded	1/31/2008			
Construction Started	5/28/2008		Construction Completed	9/12/2008			
Estimated Construction Completion	9/12/2008		Contract Execution	2/14/2008			
<b>Estimates &amp; Expenditures</b> ↑							
	PE	RW	CN	Total			
PCEs Recommended Estimate (Expenditures)	\$425,883	\$21,245	\$333,445	<b>\$780,573</b>			
Expenditures (2/22/2009)	\$425,883	\$21,245	\$333,445	<b>\$780,573</b>			
Live SYIP Estimate	\$425,883	\$21,245	\$333,445	<b>\$780,573</b>			
<a href="#">Home</a>   <a href="#">Pool</a>   <a href="#">PCES</a>   <a href="#">iPM</a>   <a href="#">Schedule</a>   <a href="#">Funding</a>   <a href="#">CERS</a>   <a href="#">SYP</a>   <a href="#">SSYP</a>   <a href="#">Dashboard</a>   <a href="#">PCFA</a>							
© Copyright 2008 Virginia Department of Transportation. All Rights Reserved. <span style="float: right;">Integrated Project Manager v2.3</span>							

Figure 15: Project Information screen

## Project Details

Project Details			
Traffic Count		Count Date	
Length	0 mi	Road System	Interstate

**Figure 16: Project Information - Project Details**

- Traffic Count..... A count or estimate of traffic passing through the intended project area
- Count Date ..... The date on which the Traffic Count was taken
- Length ..... A measurement expressing the distance between the starting point (From Location) to the ending point (To Location) and should include measurement indicators (Miles or Kilometers).
- Road System ..... Interstate, Primary, Urban or Secondary

## Location

Location			
District	Richmond	County	HENRICO
Town/City		Residency	Sandston
Route	0064	Street Name	
From	C501 -- 0.055 MILE EAST ROUTE 33 - 0.661 MILE EAST ROUTE 33	To	C502 -- 0.151 MILE EAST ROUTE 33 - 0.179 MILE EAST ROUTE 33

**Figure 17: Project Information - Location**

- District ..... The primary construction district responsible for a project
- County..... The County, which represents the jurisdiction in which the project takes place
- Town/City ..... The Town or City, which represents the jurisdiction in which the project takes place
- Street Name..... Street Name, on which the project is to take place
- From..... The starting point of the project
- To ..... The ending point of the project

## Programming

Programming			
Federal Oversight	Yes	Construction Fund Source	NH,NHS
Fund Type	Participating	Sequential Number	
VTA_PTF	No	VTA_GF	No
Order Number(s)	A35	FHWA 534 Data Number	3A113
Schedule Type	INTERSTATE - ONE HEARING DESIGN	Area Location	Urbanized (50000-199999)
Functional Classification	URBAN INTERSTATE	Accomplishment	CONTRACT
Federal System	NHS	Project Status	ADVERTISED

**Figure 18: Project Information - Programming**

- Federal Oversight..... FHWA is a team member and participates in all team meetings and milestone approvals
- Construction Fund Source ..... Source of Funds
- Fund Type ..... Indication of Federal (Participating) or State funds on the Project
- Sequential Number..... The Sequential Number is used in the state project number. In some cases the

- Section Number is changed from what is assigned in the Project Pool; in that instance the original number assigned will appear in the field.
- VTA\_PTF ..... Y or N indicator that the project is funded by an action of the general assembly using funds earmarked for priority projects
- VTA\_GF ..... Y or N indicator that the project is funded by an action of the general assembly using general funds
- FHWA 534 Number..... A number combination derived from the Area Location, Functional Classification, National Highway System and Scope for the project
- Order Number(s)..... The Order Number is assigned at advertisement and populates iPM from TRNS.PORT.
- Schedule Type..... Type of Schedule on Project (No Plan, Minimum Plan, Single Hearing, Double Hearing)
- Area Location..... First part of the FHWA data number, describes the population of the area in a range, based on population counts from the latest census.
- Functional Classification..... Second part of the FHWA data number, describes the principle use of the road in the highway system
- Accomplishment ..... Describes the method in which the project construction will be executed
- Federal System..... Project is part of the National Highway System or it is not (NHS)
- Project Status ..... The stage of project development.

### Construction Project Events

Construction Project Events			
Contract Letting	2/27/2008	Awarded	3/20/2008
Construction Started		Construction Completed	
Estimated Construction Completion		Contract Execution	4/10/2008

**Figure 19: Project Information - Construction Project Events**

- Contract Letting ..... Date that bids are received and opened by VDOT (Automatically populates from Transport on Contract Projects)
- Awarded..... Date that the Commonwealth Transportation Board, District, or Jurisdiction selected a contractor (Automatically populates from Transport on Contract Projects)
- Construction Started..... Date Construction Started (Automatically populates from Transport on Contract Projects). For Non-Contract Projects, the Construction Started Date must be entered using the Revision Request Process in the Pool.
- Construction Completed .Date Construction Ends (Automatically populates from Transport on Contract Projects). For Non-Contract Projects, the Construction Completed Date must be entered using the Revision Request Process in the Pool. NOTE: This is not project close out.
- Estimated Construction Completion..... Projected date that work is anticipated to end at the site, not project close out
- Contract Execution..... Date that the contract is signed by both VDOT and the contractor and entered in TRNS.PORT

## Estimates and Expenditures

Estimates & Expenditures <span style="float: right;">↑</span>				
	PE	RW	CN	Total
PCES Recommended Estimate (Pre-Scoping)	\$597,000	\$0	\$4,098,542	<b>\$4,695,542</b>
Expenditures (1/9/2007)	\$45,401	\$0	\$0	<b>\$45,401</b>
Live SYIP Estimate	\$100,000	\$0	\$1,988,000	<b>\$2,088,000</b>

[Home](#) | [Pool](#) | [PCES](#) | [iPM](#) | [Schedule](#) | [Funding](#) | [CEX](#) | [SYP](#) | [SSYP](#) | [Dashboard](#) | [PCFA](#)  
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**Figure 20: Project Information - Estimates and Expenditures**

PCES Recommended Estimates: PE .....	Recommended Estimate for Preliminary Engineering phase of the Project from Project Cost Estimating System (PCES)
PCES Recommended Estimates: RW .....	Recommended Estimate for Right of Way phase of the Project from Project Cost Estimating System (PCES)
PCES Recommended Estimates: CN .....	Recommended Estimate for Construction phase of the Project from Project Cost Estimating System (PCES)
PCES Recommended Estimates: Total	Total of Recommended Estimates for PE, RW and CN phases from Project Cost Estimating System (PCES)
Expenditures: PE.....	Expenditures for Preliminary Engineering phase of the Project the from Financial Management System (FMS)
Expenditures: RW .....	Expenditures for Right of Way phase of the Project from the Financial Management System (FMS)
Expenditures: CN.....	Expenditures for Construction phase of the Project from the Financial Management System (FMS)
Expenditures: Total	Total Expenditures for PE, RW and CN phases of the Project from the Financial Management System (FMS)
Live SYIP Estimates: PE	Preliminary Engineering phase dollar estimate originating from the Live SYIP
Live SYIP Estimates: RW	Right of Way phase dollar estimate originating from the Live SYIP
Live SYIP Estimates: CN	Construction phase dollar estimate originating from the Live SYIP
Live SYIP Estimates: Total	The total of PE, RW and CN dollar estimates originating from the Live SYIP

## Project Documents

In addition to the Summary, the iPM System can be used to store and track documents (Word documents, PDF documents, Images and Videos, email messages, etc.) relevant to the project. These files can be uploaded and downloaded from the **Project Documents** screen.

The screenshot displays the 'Project Documents' interface. At the top, there are four tabs: 'Project Information', 'Project Documents' (highlighted in orange), 'Communication & Divisions', and 'Action Items'. Below the tabs is a 'Summary' section with a table of project details:

UPC	12757	State Project #	0614-080-306,P101, R201, C501, B683
Project Purpose	replace substandard bridge with new structure and realign approaches	Sponsor	<a href="#">Jeffrey Echols</a>
Project Manager	<a href="#">Sandra Elliott</a>	Scope of Work	BRIDGE REPLACEMENT
Description	RTE 614 - BRIDGE REPLACEMENT		

Below the summary, there are filters for 'Document: All' and 'Phase: All'. A toolbar includes 'Search', 'Upload', 'CEDAR Documents', and 'PM Forms'. The main area contains a table of documents:

Name	Category	Phase	Description	Status	
ID_12757_C_5 CN Comp.pdf	Construction	Construction Engineering	C-5 Construction Completed	Completed	
12757_PH_trans.pdf	Public Hearings	Public Hearing or Involvement	Public Hearing Transcript.	Completed	
Rte 614 FI Report.doc	Location & Design	Field Inspection	Field Inspection Report	Completed	
Rte 614 Soils & Pavement Report.doc	Materials	Preliminary Field Inspection	Solis Report and Pavement Recommendation	Completed	
Rte 614 (12757) Constr Schedule 06-21-07.pdf	Construction	Pre-Advertisement Conference	Construction Schedule.	Completed	
Rte 614 (12757) CE&I Budget for PAC.xls	Construction	Pre-Advertisement Conference	Construction Engineering Budget.	Completed	
Rte 614 (12757) Delayed Notice to Proceed Spec.doc	Construction	Pre-Advertisement Conference	Delayed Notice to Proceed Special Provision Copied Note.	Completed	
Salem_000000000012757.xls	Location & Design	Pre-Advertisement Conference	PCES Estimate at First Submission stage.	Completed	
Rte 614 (12757) PAC Report.doc	Location & Design	Pre-Advertisement Conference	Pre-Advertisement Conference Report	Completed	
Rte 614 (12757) LD-442.doc	Location & Design	Pre-Advertisement Conference	Request for Final Environmental Certification.	Completed	

Navigation links: Previous [ 1 of 3 ] Next

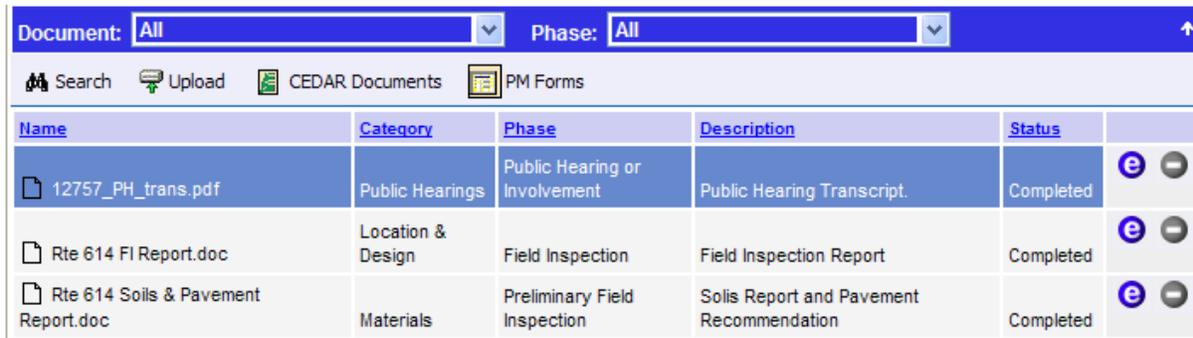
The 'Images & Videos' section has two sub-sections, 'Images' and 'Videos', each with an 'Upload' button. Both sections currently show 'No images' and 'No videos' respectively.

At the bottom, there is a 'Project Summary Reports' section with an upward arrow.

Figure 21: Project Documents

## Searching for Documents

Documents are categorized according to their relation to the project, and this categorization simplifies searching for similar documents. The **Document** and **Phase** filters provide a quick way to narrow down the list of documents by either document category or project phase.



The screenshot shows the iPM interface with filters for Document and Phase, both set to 'All'. Below the filters are buttons for Search, Upload, CEDAR Documents, and PM Forms. A table lists documents with columns for Name, Category, Phase, Description, Status, and actions.

Name	Category	Phase	Description	Status	
12757_PH_trans.pdf	Public Hearings	Public Hearing or Involvement	Public Hearing Transcript.	Completed	 
Rte 614 FI Report.doc	Location & Design	Field Inspection	Field Inspection Report	Completed	 
Rte 614 Soils & Pavement Report.doc	Materials	Preliminary Field Inspection	Solis Report and Pavement Recommendation	Completed	 

Figure 22: Project Documents – Filters and Search

In addition to the filter, you can narrow down the list more precisely using the Search function. To enable it, press  **Search**, to unhide the query fields. Next, fill in as much information as is known about the document to locate it and press  to query the list. The **CEDAR Documents** button provides access to environmental documents related to the project.

The **PM Forms** button produces a drop down of the form “Template”. Enter information onto the Template as appropriate to complete the Form. Save a .pdf version of the Form using the “Print/Save” button at the bottom of the Template.

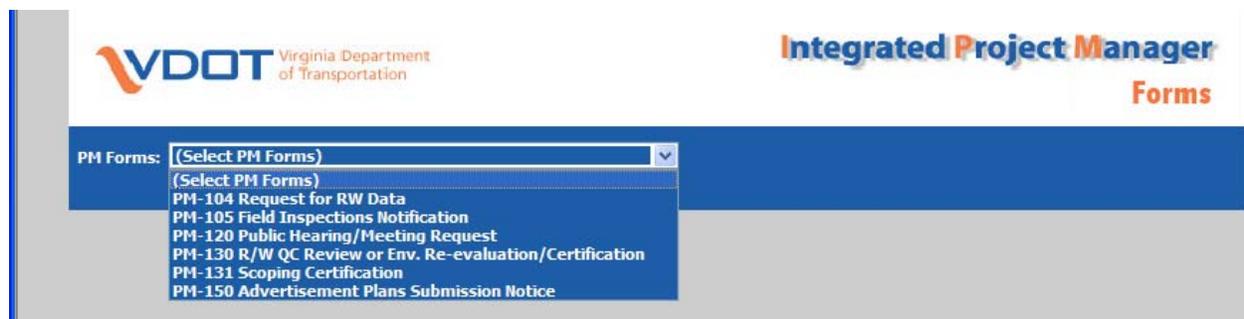


Figure 23: PM Forms Drop Down

## Document list

The results of the search are presented in a list of documents that may be sorted by any of the columns; Name, Category, Phase, Description or Status.

Name	Category	Phase	Description	Status	
Meeting to discuss corridor type projects.msg	General			Completed	
aa.sql	Estimate Supporting Document	Scoping		Completed	
61398.CSV	Construction			Completed	

Figure 24: Document List

Name ..... Standardized for forms only by requiring the form number to be used as the filename (ex. PMO-Form-4.doc). All VDOT-approved file types (.doc, .pdf, .jpg, etc.) are permitted. Use sequential alpha characters (a, b, c, etc.) to designate subsequent forms that must use the same name (ex. the first LD-404 form uploaded to the iPM would be named LD-404.doc, the second LD-404 form uploaded to the iPM would be named LD-404a.doc, and subsequent LD-404 forms will use b, c, d, etc.).

All other (non-form) file types will be named using the original name assigned to the document or a simple and descriptive name chosen by the Project Manager or Team Member.

Category ..... Identifies the VDOT Division/Functional Area that created the document, or the generic document type.

Phase..... Identifies the Concurrent Engineering Process (CEP) phase/milestone relevant to document creation.

Description ..... This is an “open” text field that Project Managers and Team Members should use to provide a brief description of the document

Status ..... Identifies the current stage of document development/progression.

## Uploading Documents

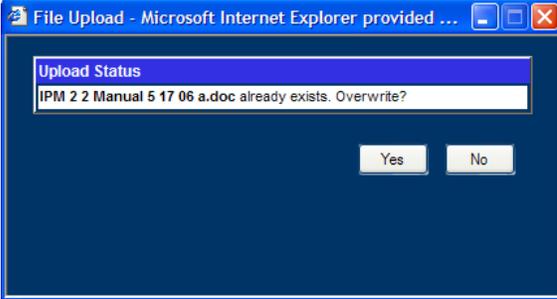
To upload a document,

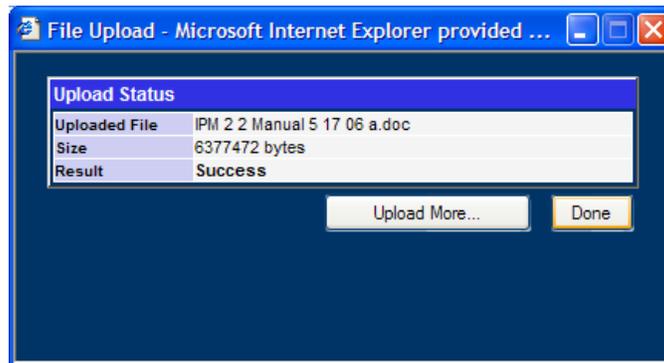
1. Click Upload; a window for selecting and naming the document similar to the following is presented.



Figure 25: Upload Document Window

2. Click  to find the location of the file you want to upload.
3. Select from drop down lists for: Category, Phase, and Status. You must select one of the entries from the lists provided.
4. You may enter a free form text description in the space provided.

 <i>Note:</i>	<i>When selecting files to upload be aware that if you use the same file name you will receive a warning about overwriting an existing file.</i>	
--	--	--



**Figure 26: File Upload Success Message Box**

5. When you are finished, you will receive the following message box, asking if you want to  files or are , click the appropriate button. The uploaded file or files will be shown in the list.

### Downloading and Viewing Documents

As you move the cursor over a document in the list, the row is highlighted. To download and view a document, simply click on the desired item.

Name	Category	Phase	Description	Status	
 Meeting to discuss corridor type projects.msg	General			Completed	 
 aa.sql	Estimate Supporting Document	Scoping		Completed	 
 61398.CSV	Construction			Completed	 

**Figure 27: Select a document**

A new window will be opened with the file.

 <b>Note:</b>	<i>Since the files may be in any format, there is no guarantee that your computer has the proper software installed for viewing the document. Contact your System Administrator if you are unable to properly view the file.</i>
--	--

### Editing Document Metadata

Users who have rights as ‘Project Manager’ can edit document metadata. To edit any of the metadata, click , make any necessary changes, and press  to complete the modification.

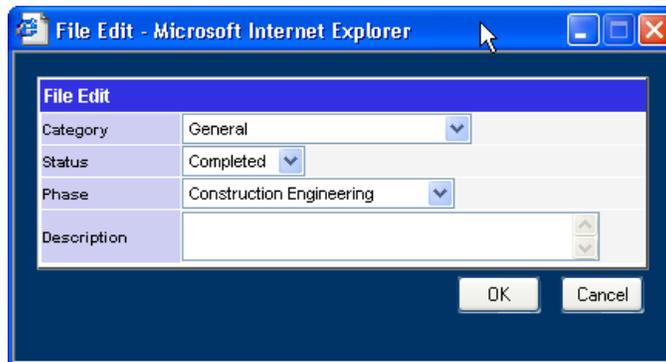


Figure 28: Project Documents - Edit Document Metadata

### Deleting Project Documents

Users who have rights as ‘Project Manager’ can delete the documents.

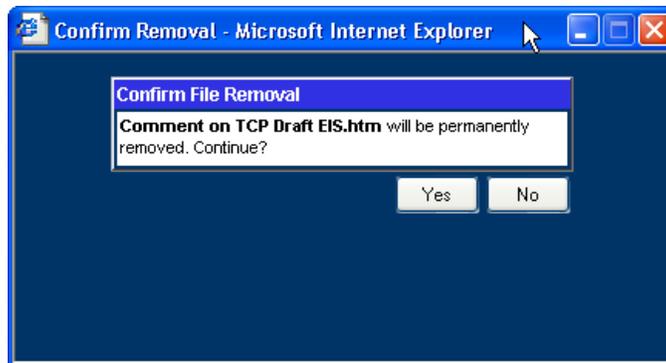


Figure 29: Delete Document

To remove a document from the iPM, press  and press  on the Confirm Removal screen to delete, or  to cancel the deletion.

### Images & Videos

The Images & Videos section is used to display a catalog of pictures, videos, and other multimedia files for the project. Anyone can download these images and videos by clicking on the particular image or video link. Authorized users can upload images and videos.

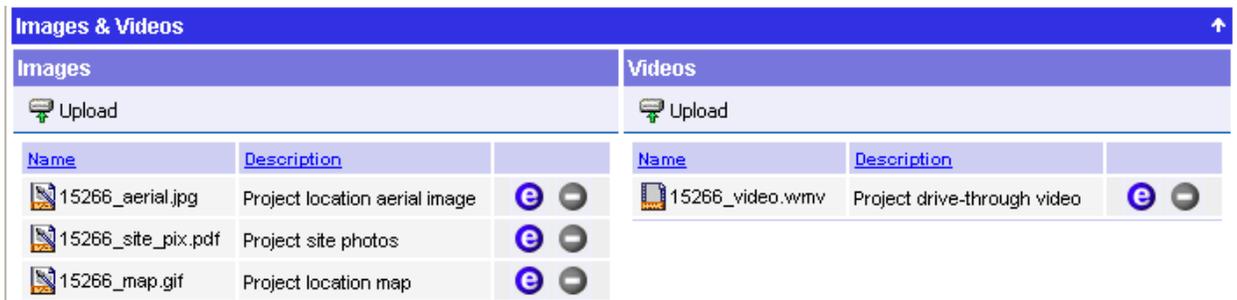


Figure 30: Images & Videos

1. Click  **Upload**; a window for selecting and naming the document similar to the following is presented.

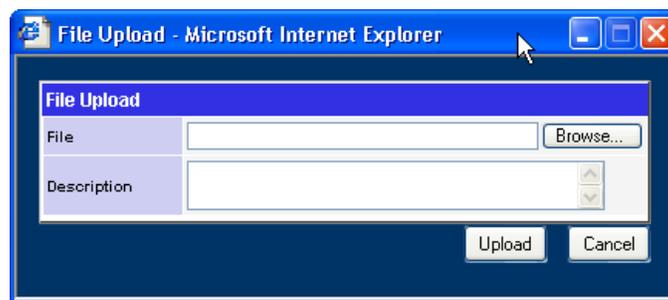
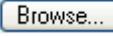


Figure 31: Project Documents - Upload Images & Videos

2. Click  to find the location of the file you want to upload.
3. You may enter a free form text description in the space provided.
4. Click  to complete the upload or  to end the process without uploading.

## Project Summary Reports

The Project Summary Report is a high-level summary of accomplishments for the project and can be accessed by selecting a project in the **iPM** and then the **Project Documents** tab. Project Summary report is a snapshot of Project goals, objectives, budget, schedule, comments and information. The goals in the Project Summary report are filled in based on the last summary report generated.

The report has an editable entry field for the “**Project Goals and Objectives**” and an entry field for “**PM Summary Comments**”. The report automatically populates fields for “Baseline Budget” (from iSYP), “Expenditures” (from FMS), “% Expended (auto calculation - Expenditures/Budget)”, “Budget Available” (auto calculation – Budget-Expenditures) and planned and actual dates for project Key Event dates.

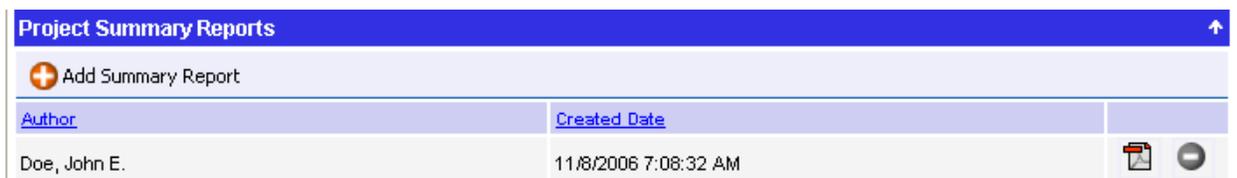


Figure 32: Project Documents - Project Summary Reports section

A Project Summary Report can only be created or deleted by the Project Manager, but can be viewed by anyone with access to the projects.

To view a Project Summary Report click .

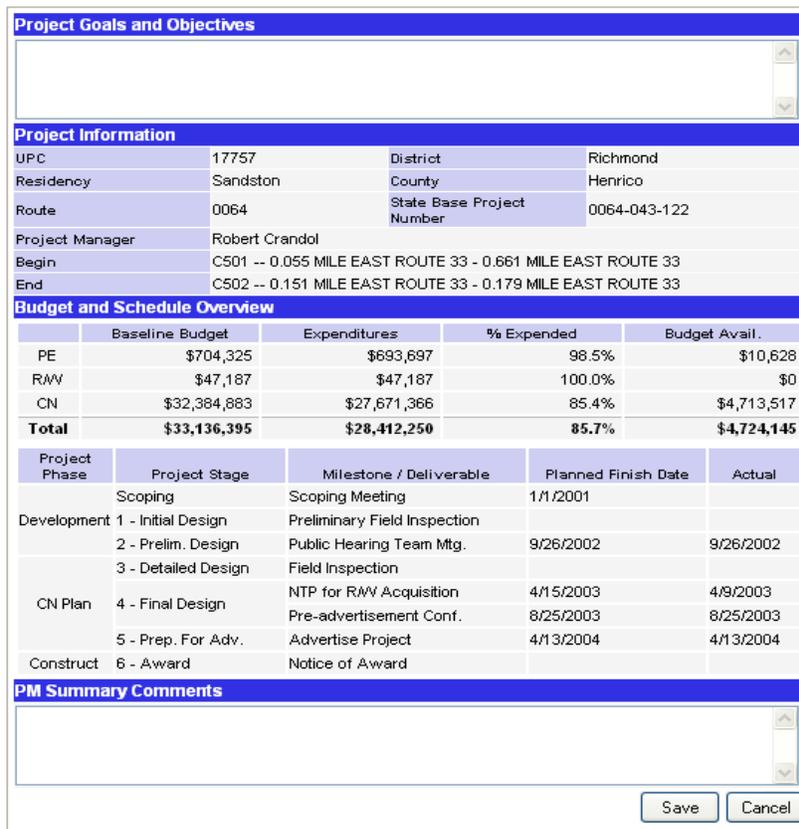
### Create Project Summary Report

1. To create a Project Summary Report, click .

Project Goals and Objectives ... Editable information related to the goals and objectives entered by the Project Manager

PM Summary Comments ..... Editable comments entered by the Project Manager

2. A new browser window opens similar to the one below.

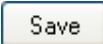


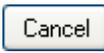
Project Information				
UPC	17757	District	Richmond	
Residency	Sandston	County	Henrico	
Route	0064	State Base Project Number	0064-043-122	
Project Manager	Robert Crandol			
Begin	C501 -- 0.055 MILE EAST ROUTE 33 - 0.661 MILE EAST ROUTE 33			
End	C502 -- 0.151 MILE EAST ROUTE 33 - 0.179 MILE EAST ROUTE 33			

Budget and Schedule Overview				
	Baseline Budget	Expenditures	% Expended	Budget Avail.
PE	\$704,325	\$693,697	98.5%	\$10,628
RAW	\$47,187	\$47,187	100.0%	\$0
CN	\$32,384,883	\$27,671,366	85.4%	\$4,713,517
<b>Total</b>	<b>\$33,136,395</b>	<b>\$28,412,250</b>	<b>85.7%</b>	<b>\$4,724,145</b>

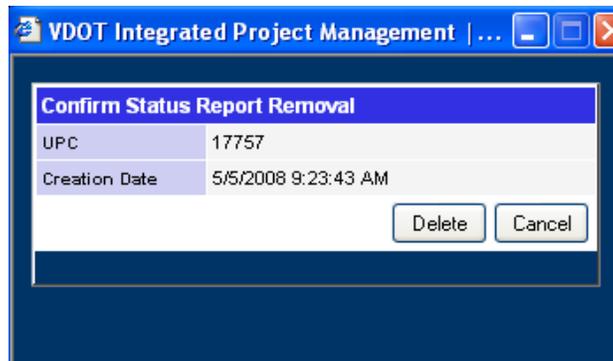
Project Phase	Project Stage	Milestone / Deliverable	Planned Finish Date	Actual
Development	Scoping	Scoping Meeting	1/1/2001	
	1 - Initial Design	Preliminary Field Inspection		
	2 - Prelim. Design	Public Hearing Team Mtg.	9/26/2002	9/26/2002
CN Plan	3 - Detailed Design	Field Inspection		
	4 - Final Design	NTP for RAW Acquisition	4/15/2003	4/9/2003
		Pre-advertisement Conf.	8/25/2003	8/25/2003
Construct	5 - Prep. For Adv.	Advertise Project	4/13/2004	4/13/2004
	6 - Award	Notice of Award		

Figure 33: Project Documents - Add Summary Report data entry form

2. Once the Project Manager has completed the input of information, click  at the bottom of the window to save the report as a printable PDF file.

	<i>Note:</i> Click  to get out of the window without saving the file.
---	--

To delete a Report, click , and confirm the delete in the pop-up window.



**Figure 34: Project Documents - Delete Report**

Click  to confirm the deletion or  to keep the report.

 <b>Note:</b>	<i>Only the project manager, who creates the report, can delete that report.</i>
--	--

## Plan Drawings (FALCON)

The files displayed here are those indicated as the latest version as stored in Falcon.

Plan Drawings (FALCON) <span style="float: right;">↑</span>			
<input checked="" type="checkbox"/> Check All <input type="checkbox"/> Uncheck All  Print			
Filename	Description	Last Modified Date	
<input type="checkbox"/> 0221-118-104 c501_01.tif	Fr: 0.050 km W. of old forest Rd. To: Rte. 501/Expressway (Crosstown Conn)	6/8/2004	
<input type="checkbox"/> 0221-118-104 c501_01a.tif	Fr: 0.050 km W. of old forest Rd. To: Rte. 501/Expressway (Crosstown Conn)	3/29/2004	
<input type="checkbox"/> 0221-118-104 c501_01b.tif	Fr: 0.050 km W. of old forest Rd. To: Rte. 501/Expressway (Crosstown Conn)	3/29/2004	
<input type="checkbox"/> 0221-118-104 c501_01c.tif	Fr: 0.050 km W. of old forest Rd. To: Rte. 501/Expressway (Crosstown Conn)	10/29/2004	
<input type="checkbox"/> 0221-118-104 c501_01c1.tif	Fr: 0.050 km W. of old forest Rd. To: Rte. 501/Expressway (Crosstown Conn)	10/29/2004	
<input type="checkbox"/> 0221-118-104 c501_01c2.tif	Fr: 0.050 km W. of old forest Rd. To: Rte. 501/Expressway (Crosstown Conn)	10/29/2004	
<input type="checkbox"/> 0221-118-104 c501_01d.tif	Fr: 0.050 km W. of old forest Rd. To: Rte. 501/Expressway (Crosstown Conn)	3/29/2004	
<input type="checkbox"/> 0221-118-104 c501_01e.tif	Fr: 0.050 km W. of old forest Rd. To: Rte. 501/Expressway (Crosstown Conn)	3/29/2004	
<input type="checkbox"/> 0221-118-104 c501_01f.tif	Fr: 0.050 km W. of old forest Rd. To: Rte. 501/Expressway (Crosstown Conn)	3/29/2004	

**Figure 35: Project Documents - Plan Drawings (FALCON) section**

### Viewing Plan Drawings

If plan drawings are available for a project, the image can be viewed simply by clicking on the record in the list that is highlighted.

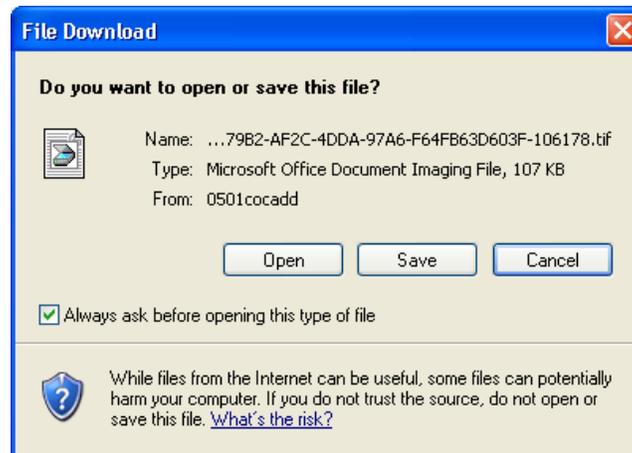


Figure 36: Project Documents - View Plan Drawings (FALCON)

The user may click  to launch a viewer, click  to save to a desired location, or click  to return to the last window.



*Note:*

*Note that the drawings are in TIFF format and will require a program capable of viewing TIFF files.*

### Printing Plan Drawings

1. Place a check  in the box for the desired drawing(s) to be printed.
2. Press .
3. Select the destination plotter for the printout and choose whether to reverse the order of how documents are output.

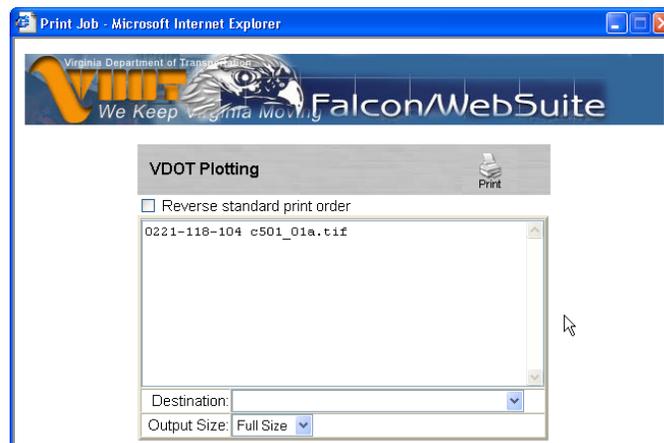


Figure 37: Project Documents - Print Plan Drawings

4. Select the Destination printer from the dropdown.
5. Select the Output Size from the dropdown.
6. Press  to start the print job; then  to close the print window.

## Communications and Divisions

### Communication & Divisions screen

In addition to the Summary, the **Communication & Divisions** screen lists the project team and planned meetings. This section is especially useful for sending group emails and organizing meetings.

Summary			
UPC	91847	State Project #	0000-034-R47
Project Purpose	Construct new road to grade, drain and pave New R/R Required. NO ROUTE # ASSIGNED YET		Sponsor <a href="#">Jerry Copp</a>
Project Manager	<a href="#">Dwight Hawkins</a>		Scope of Work
Description	Grade, Drainage & Pave (Connector Rd)		
NEW CONSTRUCTION			

Communication																					
Team			Planned Meetings																		
<a href="#">Add Team Member</a> <input checked="" type="checkbox"/> Email All Team Members			<table border="1"> <thead> <tr> <th>Meeting</th> <th>Planned</th> <th>Held/Expired</th> </tr> </thead> <tbody> <tr> <td>Scoping</td> <td></td> <td></td> </tr> <tr> <td>Preliminary Field Inspection</td> <td></td> <td></td> </tr> <tr> <td>Willingness/Public Hearing</td> <td></td> <td></td> </tr> <tr> <td>Field Inspection</td> <td></td> <td></td> </tr> <tr> <td>Pre-advertisement Conference</td> <td></td> <td></td> </tr> </tbody> </table>	Meeting	Planned	Held/Expired	Scoping			Preliminary Field Inspection			Willingness/Public Hearing			Field Inspection			Pre-advertisement Conference		
Meeting	Planned	Held/Expired																			
Scoping																					
Preliminary Field Inspection																					
Willingness/Public Hearing																					
Field Inspection																					
Pre-advertisement Conference																					
Construction	Brian Becker (Responsible Person)	540-378-5049																			
Environmental	Joshua Gutshall	540-332-9894																			
Environmental	Ruth Gardner	540-332-9136																			
Location & Design	Brenda Light	(804) 786-2509																			

Figure 38: Communications and Divisions Screen

### Team

Team section lists all the assigned Team Members. Team members must be included in this section in order for them to have permission to record actual dates in the Schedule tool. Team members listed in this section can only record actual dates in the Schedule tool for activities owned by their respective function areas.

### Add Team Members

1. Add Team Members by clicking  [Add Team Member](#). A new browser window similar to the one below opens.

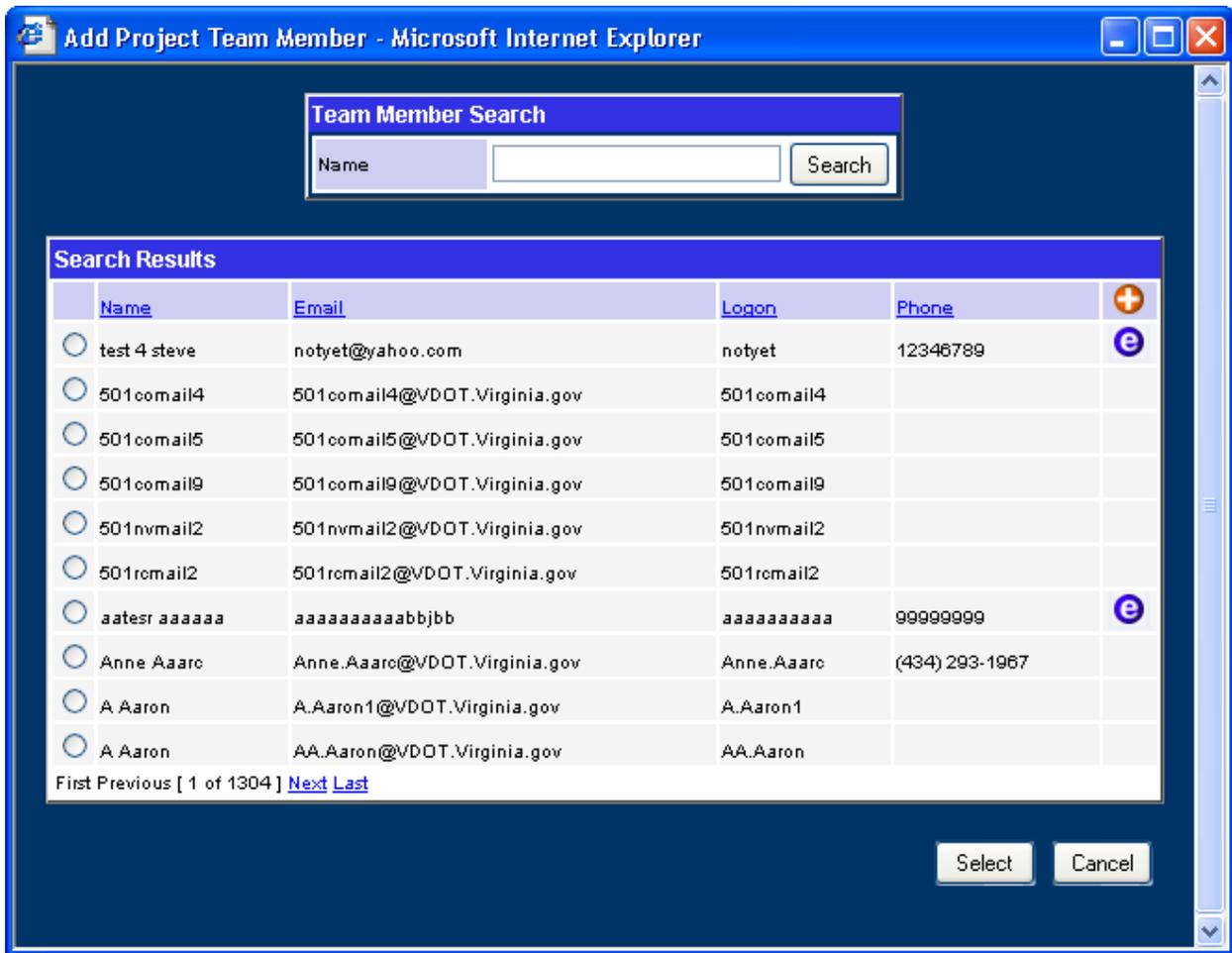


Figure 39: Communication & Division - Add Team Member

2. Search for the team member to add by entering all or part of the name in the search field and click .

If the new added team member is going to be the person responsible for Sealing and Signing the plans, add the check after selecting the function. That note will appear on the Team Member List.

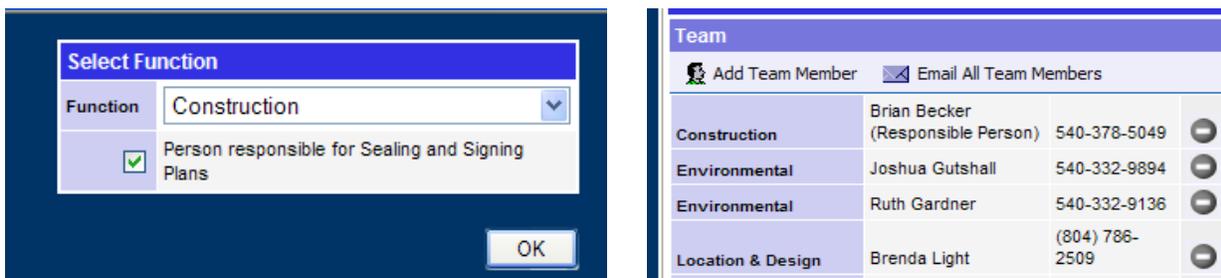
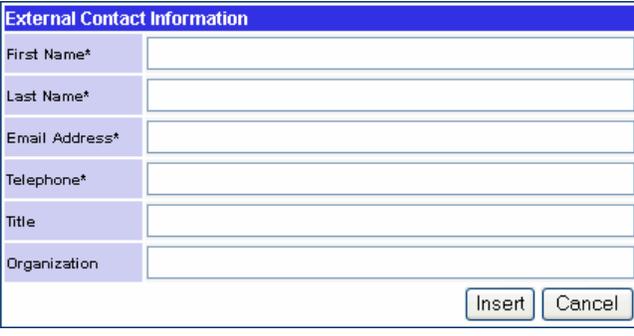


Figure 40: Sealing and Signing Check Box

 <p><i>Note:</i></p>	<p>If the person is not on the list, users may add them as an external contact by clicking ; a new browser window similar to the one on the right is displayed where users may enter information in the required fields and click .</p>	 <p><b>External Contact Information</b></p> <p>First Name* <input type="text"/></p> <p>Last Name* <input type="text"/></p> <p>Email Address* <input type="text"/></p> <p>Telephone* <input type="text"/></p> <p>Title <input type="text"/></p> <p>Organization <input type="text"/></p> <p><input type="button" value="Insert"/> <input type="button" value="Cancel"/></p>
 <p><i>Note:</i></p>	<p>An external contact's information may be edited by clicking ; a new browser window similar to the one on the right is displayed where users may enter information in the required fields and click .</p>	 <p><b>External Contact Information</b></p> <p>First Name* <input type="text" value="test"/></p> <p>Last Name* <input type="text" value="4 steve"/></p> <p>Email Address* <input type="text" value="notyet@yahoo.com"/></p> <p>Telephone* <input type="text" value="12346789"/></p> <p>Title <input type="text"/></p> <p>Organization <input type="text"/></p> <p><input type="button" value="Update"/> <input type="button" value="Cancel"/></p>

5. Click on the selection  next to the name of the person(s) to add as members then click .

 <p><i>Note:</i></p>	<p>Search results list all persons with the text string anywhere in their first or last name.</p>
---	---

## Email Team Members

Team				Planned Meetings		
 Add Team Member  Email All Team Members				Meeting	Planned	Held/Expired
Asset Management	Adriana Boulgia	702-555-1212		Scoping		
Asset Management	Virginia Peters	702-987-0999		Preliminary Field Inspection	6/20/2002	6/20/2002
Environmental	Palmer Stearns	804-524-6012		Willingness/Public Hearing	10/30/2001	10/30/2001
Location & Design	Grover Cleveland	804-524-6504		Field Inspection		
Materials	Todd Beach	804-524-6187		Pre-advertisement Conference		

**Figure 41: Communication & Divisions - Email Team Members**

To email any of the listed team members, simply click on the individual's name in the list. The default email application will generate an email message with the address already filled in.

To email all of the project team members, press  **Email All Team Members**. The default email application will generate an email message with the addresses already filled in.

## Planned Meetings

This is a viewable list of planned meetings added or edited via the Schedule application. In the Schedule application, the planned meeting dates correspond to the following activities:

- Scoping = Activity 22X
- Preliminary Field Inspection = Activity 36X
- Willingness/Public Hearing = 47X or 48X (whichever applies)
- Field Inspection = Activity 65X
- Pre-advertisement Conference = Activity 71X

## Divisions Section

This screen includes section-specific data for tracking project development. The section contains comments, questions and other information relevant to the many different Divisions which can be accessed by clicking on the drop down box.

### Entering Division Comment

Comments, questions, or status information can be inserted into the **Comments section** of the Communications and Divisions screen.

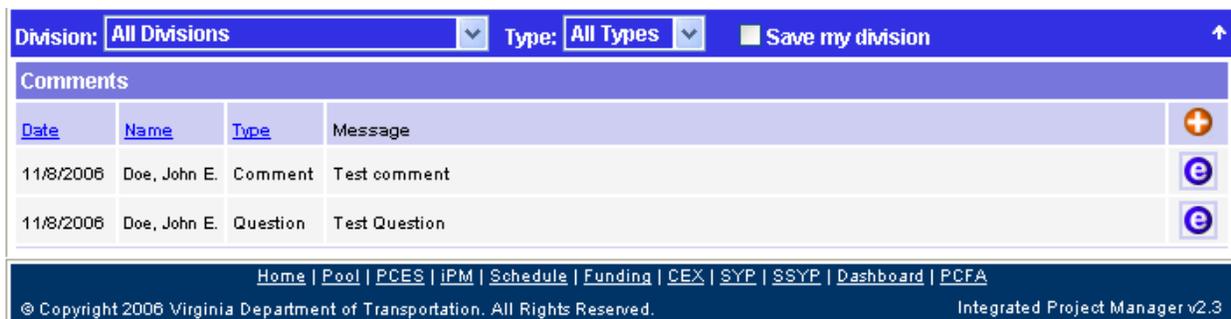


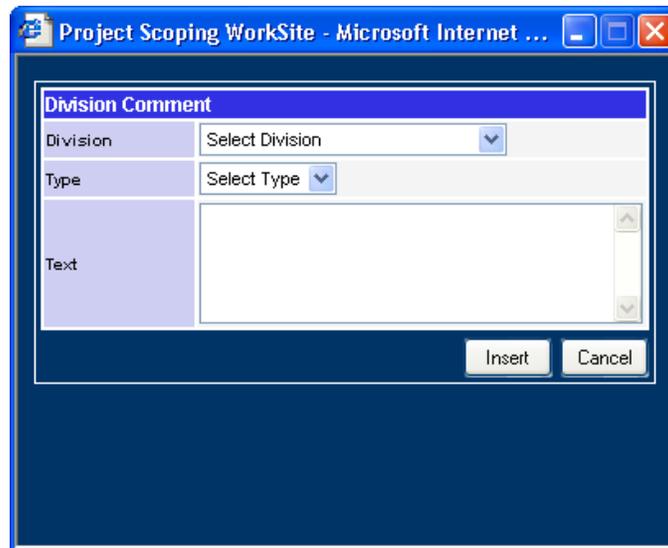
Figure 42: Communication & Divisions - Divisions Comments section

### Filter Division Comment

The items displayed in the Comments list may be filtered to display only those entries in a division or of a certain type. The user may select from the dropdown which division and/or which type of entries to display in the list by selecting from the **Division** and **Type** dropdowns.

### Add Division Comment, Question or Status information

Team Members may add Comments, Questions or Status information by clicking . A window similar to the one that follows is presented for the user to enter the appropriate information.

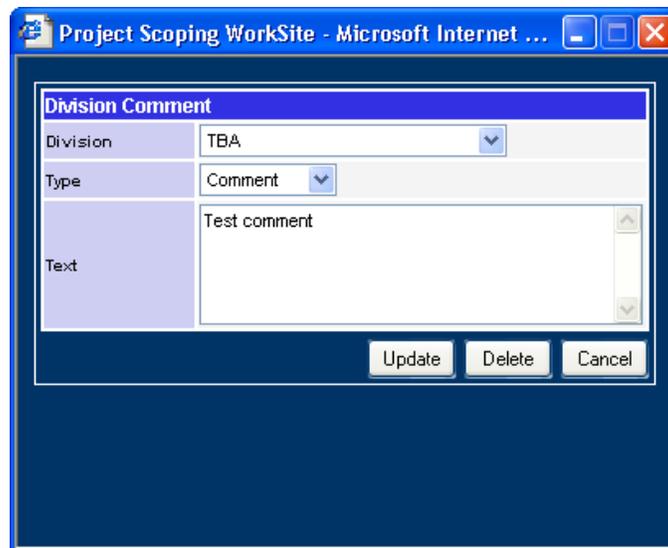


**Figure 43: Communication & Divisions – Add Division Comment**

Select a division from the dropdown field, select a comment type, enter the appropriate text, and click **Insert**.

### **Edit or Delete Division Comments**

Team Members may edit Comments, Questions or Status information by clicking **e**. A window similar to the one that follows is presented for the user to enter the appropriate information.



**Figure 44: Communication & Divisions - Edit Division comments**

Select the information to edit, a division from the dropdown field, a comment type, or edit the text, and click **Update**.

To delete a comment click **Delete**.

## Division Additional Information

Additional information is displayed if a specific division filter is selected from the dropdown menu.

### Environmental – Additional Information

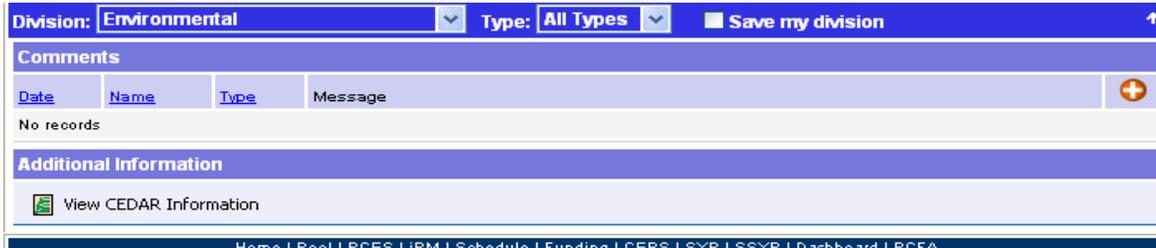


Figure 45: Environmental Division - Additional Information

Under Additional Information, the user may click [View CEDAR Information](#) that will navigate them to the CEDAR Application for additional information about the project.

### L&D TE Design – Additional Information

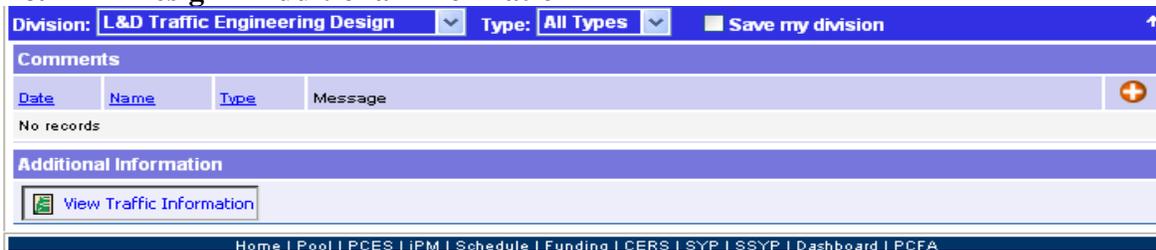


Figure 46: L&D/Traffic Engineering - Additional Information

Under Additional Information, the user may click [View Traffic Information](#) that will navigate them to the Pool Application for additional information about the project.

### Location & Design / Hydraulics – Additional Information

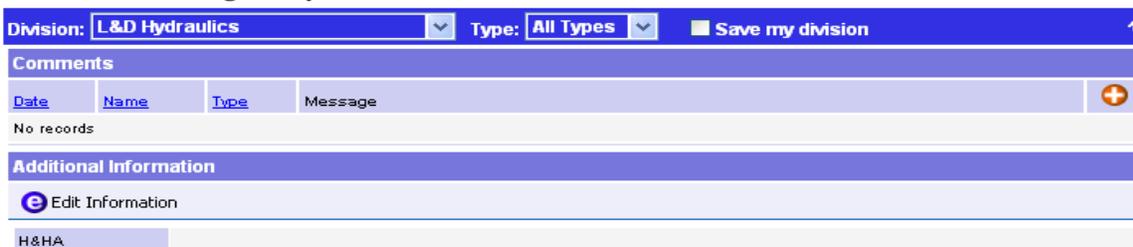


Figure 47: Location and Design / Hydraulics- Additional Information

H & HA ..... Hydrologic and Hydraulic Analysis- Performed for a proposed highway embankment or other encroachment into the floodplain of a major waterway and for a bridge or other major structure over a major waterway and/or where a flood insurance study or other officially designated or delineated floodplain is concerned

## Materials – Additional Information

**Figure 48: Materials - Additional Information**

Soils Report ..... Completion date of the soils report for a design project.  
 StrucFoundData ..... Completion date of the structural foundation data report (completed for bridge projects).

## Traffic Engineering Division - Additional Information

**Figure 49: Traffic Engineering Division - Additional Information**

Designer ..... Traffic Engineering individual responsible for the coordination of the project  
 TE File ..... Storage location of the file plan sheets  
 Stage ..... The concurrent engineering phase: Pre Scope, Scope, PFI, Public Hearing, FI, PAC and Construction.  
 Signals By ..... The individual that designed the signal plans or signals designer  
 Signal Designer ..... The Name of the individual that designed the signal plans  
 Sequence of Construction ..... Sequence of construction comments  
 Pavement Marking/Sign Plans ..... Comments indicating if the plans are being accomplished in house or by contract, and includes reviewer’s name and contractor’s name

- TE Comments..... Project notes regarding schedule changes and other information from Program Day meetings
- Signal Plans ..... Comments indicating if the plans are being accomplished in house or by contract, and includes reviewer’s name and contractor’s name

**Right of Way Division - Additional Information**



Number	Clear	NTP (Partial Takes)	NTP (Total Takes)
Parcels	82	83	5/23/2006
Utility Relocations	9	0	
Relocations	10	8	
RUMS Remarks	Hampton Roads Project Appraisal Project - Fredricksburg/Lynchburg Project Manager - C.C. Corbin Appraisers - Bugg, Smith, Miller Rev. - Lively		
Outstanding Condemnations	Yes		
# of Outstanding Condemnations	15		
Total Outstanding Condemnation Estimate	\$3,233,011		

**Figure 50: Right of Way Division - Additional Information**

- Parcels ..... Land on which right of way or easements are required for project
- Utility Relocations ..... Utility company facilities that need to be relocated for project
- Relocations ..... Families/businesses that need to be relocated for project
- RUMS Remarks ..... Comments from the RUMS Project Status screen
- \* Number..... Total active number
- \* Clear Total number cleared for advertisement
- \* NTP (Partial Takes).. Date: Notice to Proceed to acquire parcels involving partial takes issued by Right of Way Division
- \* NTP (Total Takes).... Date: Notice to Proceed to acquire total take parcels issued by Right of Way Division
- Outstanding Condemnations..... Indication of the existance of Outstanding Condemnations on the project
- # of Outstanding Condemnations..... Outstanding Condemnations equal to the number of Certificates filed
- Total Outstanding Condemnation Value... Total estimated value of the Outstanding Condemnations for the project
- \* Column information that pertains to each row

## Structure & Bridge – Additional Information

Division: Structure & Bridge				Type: All Types	<input type="checkbox"/> Save my division
Comments					
Date	Name	Type	Message		
No records					
Structure and Bridge					
Phase	Job #	Federal Struct #	Description		
CN	B683	9776	EBL ROUTE 64 OVER CSX RR		
CN	B694	9777	WBL ROUTE 64 OVER CSX RR		
RW	R201				
PE	P101				

**Figure 51: Structure & Bridge - Additional Information**

- Phase..... This indicates the three main phases in project development, Preliminary Engineering (design), Right of Way (acquisition of property, incidental RW payments and utilities), and Construction
- Job # ..... Numbers identifying jobs that relate to each of the phases of a project
- Federal Structure # ..... (Same as “Project Federal Structure #) For a new structure, this is a 5-digit number assigned by the District Structure and Bridge Section. The bridge will be associated with this number for as long as it is in service. Within the entire state, this number is unique to the project bridge. For a bridge widening or bridge rehabilitation project, this would be the same number as the Existing Federal Structure ID # for the existing bridge
- Description ..... Includes name of facilities carried and crossed

## Action Items

Specific assignments that need to be completed for the project should be listed and managed on the Action Items screen. This screen can be used by project managers to assign tasks or to identify items for attention.

Owner	Description	Date Entered	Date Cleared	
No records				

Figure 52: Action Items

## Create New Action Item

### Create an action item

1. Click ; a dialog window opens to add the action item.

VDOT Project Development System | Edit Actio...

Create Action Item

Owner

Description

Date Entered 11/9/2006 Completion Date

Figure 53: Create Action Item

2. Select an Owner by clicking . A search window opens similar to the following.

Name	Email Address	Logon
Doe, John	JohnD@hotmail	
Doernhoefer, Nancy L.	Nancy.Doernhoefer@VDOT.Virginia.gov	Doernhoefer_NL

Figure 54: Create Action Item – Assign Owner Search

3. Enter all or part of a person's name in the Name field, and click .
4. Select a user from the search results by clicking on the row.
5. Enter a Description for this task.
6. If this task is completed, enter a date of completion manually or by clicking , and selecting the date from the calendar.



Figure 55: Assign Date Calendar

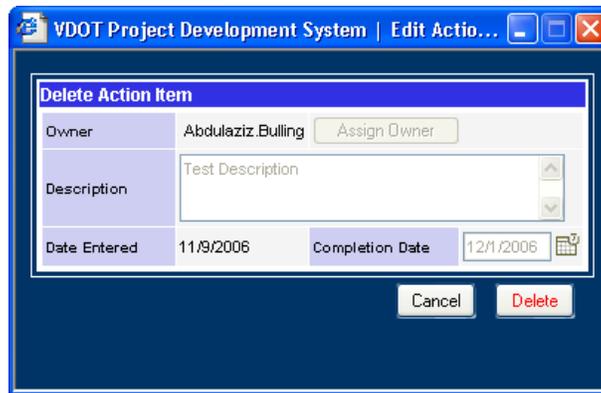
7. Click  to create the action item. The owner will receive an e-mail alert of the item.

### Edit an Action Item

1. To flag the action item as completed, click  for the item in the list.
2. Edit the description field if desired.
3. Enter a date by manually typing it in or by clicking  and selecting the date from the calendar (see Figure 55: Assign Date Calendar).
4. Finally, click  to mark the task as complete.

### Delete an Action Item

1. To delete an action item, click .



**Figure 56: Delete Action Item**

2. Click  to proceed with deletion, or  to end the process without deleting the action item.

## iPM Reports

### iPM Reports Home Page

iPM Reports page can be selected by clicking **iPM Reports** tab on the iPM main page.

State Project #	Description	Route	UPC	District	Ad Date	Proj. Manager
	At Route 627 (Phase II)	0095	70454	Fredericksburg		Richard Spurlock
	Norfolk Harbor Deepening		70465	Hampton Roads		
0000-042-715	Plant Mix - Hanover	0000	89436	Richmond	6/1/2008	Michele Piccolomini
0000-053-939	Mill and paving overlay, Loudoun County	0000	89378	NOVA	4/1/2008	Allison Richter
0000-076-963	Mill and Paving Overlay, Prince William County	0000	89377	NOVA	4/1/2008	Allison Richter
0000-131-707	Fentress Airfld Rd over Pocoty Creek Va struc 8017	0000	85954	Hampton Roads		Kendal Walus
0000-962-026	DISTRICTWIDE CULVERT FLOWLINE REPAIRS	0000	89985	Salem	4/1/2009	Jack Bayne

Figure 57: iPM Main Page - iPM Reports Tab

The iPM reports page will be opened in a new window.

Report: (Select Report) Help | Feedback

Figure 58: iPM Reports Home Page

Select a report from the Report dropdown menu.

Each report contains some or perhaps all of the following filters to allow the user to customize the report: District, Accomplishment, Residency, Status, Fund Source, SYP, Record Type, Activity Owner, Activity, Project Manager, Road System, Program Manager, UPC, Begin Date and End Date.

These filters may be used individually or in combination with other filters. Multiple items can be selected from most filter pull-downs by checking the box next to the desired parameter. Other filters are selected by highlighting the desired parameter.

Reports with the date range option (Begin Date – End Date), allow the user to select a specific time frame by entering a date in both fields (06/30/06 – 12/31/06). Except for 36 Month Ad Report, to select all past data up to a specific date, only enter a date in the End Date field (first field empty – 06/30/05); to retrieve data from a specific date and all future dates, enter date in Begin Date field only (06/30/05 – second field empty).

The screenshot shows a web browser window titled "Report Viewer - Microsoft Internet Explorer provided by VDOT". The interface contains several dropdown menus and input fields for filtering reports. The parameters are as follows:

- District: Bristol, Central Office, Culpepe
- Residency: Wise, Abingdon, Lebanon, Taze
- Accomplishment: CONTRACT, DESIGN BUILD, S/
- Status Code: ACTIVITY DATES SET
- Project Manager: , Abbai, Aster, Adams, Annette
- Begin Date: (ex.xx/xx/xxxx) [calendar icon]  NULL
- Road System: Enhancement, Interstate, Misc
- Bridge: All
- ProgramManager: Programming Division, Local As
- Record Type: project
- SYP: In SYP
- End Date: (ex.xx/xx/xxxx) [calendar icon]  NULL

A "View Report" button is located in the top right corner of the form area.

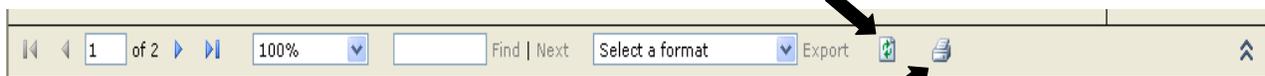
**Figure 59: iPM Reports – Sample Parameter list**

You can run the report by clicking . The report will be generated using the selected parameters; and it will look as shown in Report Details beginning on page 35 (Figure 60).

### Reporting Toolbar

The reporting toolbar contains tools to search, navigate, select a format and export, refresh the data, and print the report

Click here to refresh the data in the report



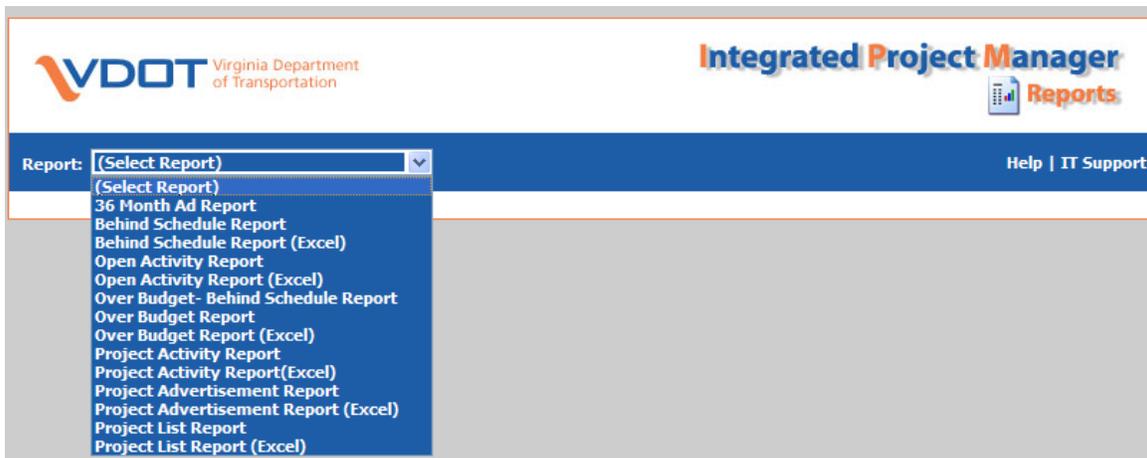
Click on the printer icon to print the report

**Figure 60: Reporting Toolbar**

To regenerate the report, click .

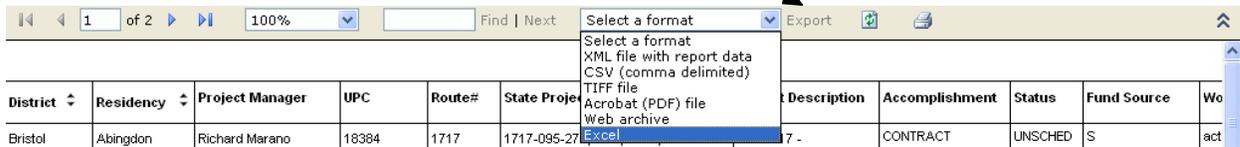
To print the report, click .

### Exporting a Report



**Figure 61: iPM Reports – Excel report selection**

1. You can export and download a report or its data by selecting an excel formatted report from the report menu. Each report will have an excel version for exporting except the 36 Month Advertisement which is already formatted for exporting.



**Figure 62: iPM Reports - Export Options**

2. Select 'excel' format from the dropdown menu for the report or data to be exported.
3. Click "Export" to perform the download.

### Printing a Report

To print a report, click  located in the information bar above the report.

	<i>Note:</i> <i>Selecting the windows printing options (from the windows file menu bar, or the windows tool bar) does not provide the best formatting for print.</i>
---	--

	<i>Note:</i> <i>The print tool displays more pages in the print preview window than are shown in the report page counter. The print preview number is correct and generally yields more pages. The number of pages can be reduced by decreasing the top and bottom margins in the print setup, thus displaying more information per sheet. The filters are arranged differently in the report format and the Excel export format. The functionality is the same.</i>
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## Report Details

### 36 Month Advertisement Report

The 36 Month Advertisement Report was developed to replicate the report created and used for the monthly Advertisement Meetings. This report will provide data for both project and budget record types that have activity 80 and no Actual End Date.

### 36 Month Advertisement Report Parameters

**Figure 63: 36 Month Advertisement Report parameters**

The report defaults to pre-selected filters for the Advertisement Report, however the defaults can be changed by selecting an item or combination of items from the appropriate filter.

	<i>Note:</i> <i>A date range must be entered or the null box checked to prevent an error message from appearing, instructing you to enter the dates.</i>
---	--

The 36 Month Advertisement Report is also formatted to be exported to Excel to utilize all its available functions, (data begins on sheet 2 in Excel).

Target Adv Date (Planned End Date)	UPC	State	Project No	SYS	DC	AC	Project Manager	Residency	County	Town	Project Description	PCES Construction Estimate	Fund Source	Notes	
9/30/2006	61453	0088-122-105,P 101, NS01		U	15	5	Bryant,Porter	Norfolk	NO.FF.PORTCH ES:(RURAL)	NO.FFOLK	RTE 55 - IMPROVE ALIGNMENTS IN:PERSEADJUS	\$190,550	STP		
8/30/2007	78245	6105-127-135,P 101, CS01		P	15	4	Balky, Peter	Saunder		ROHMOND	VIRGINIA CAPITAL TRAIL - WESTERN SECTION	\$1,338,000	STP		
12/31/2007	70304	6103-067-106,P 101, CS01		P	15	4	Erba, Loker	Amelb		NOTTOWAY	CAMP PICHETT MILITARY SERVICE CLUB MUSEUM	\$1,953,576	STP		
3/25/2008	72318	0659-005-161,P 101, NS01		S	15	3	Sara, Holt	Amelst		AMHERST	RTE 659 - RURAL RUSTIC ROAD SURFACE TREAT NON-HARDSURFACB	\$274,000	S		
3/25/2008	73111	0709-062-161,P 101, NS01		S	15	3	Sara, Holt	Amelst		NELSON	RTE 709 - RURAL RUSTIC ROAD SURFACE TREAT NON-HARDSURFACB	\$7,250	S		
3/31/2008	70324	6103-073-124,P 101, CS01		U	15	3	Stokely, Murphy	Dinwya		PRINCE EDWARD	FARMVILLE	ROBERT RUSSA MOTTON MUSEUM	\$300,596	STP	
4/7/2008	55482	0194-122-104,P 101, NS01		U	15	5	Bryant,Porter	Norfolk	NO.FF.PORTCH ES:(RURAL)	NO.FFOLK	RTE 194 - IMPROVE SIGNING AND PAVEMENT MARKINGS	\$110,000	STP		
4/7/2008	64216	0168-122-106,P 101, NS01		U	15	5	Bryant,Porter	Norfolk	NO.FF.PORTCH ES:(RURAL)	NO.FFOLK	RTE 168 - LEFT TURN LANE	\$257,500	STP		
4/7/2008	71726	U000-122-156,P 101, NS01		U	15	5	Bryant,Porter	Norfolk	NO.FF.PORTCH ES:(RURAL)	NO.FFOLK	SENBELS PT RD - PED PUSHBUTTONS, SIGNALS, SIDEWALKS, ETC.	\$255,852	STP		
4/8/2008	16507	0657-029-357,P 101, RW201, CS01		S	15	9	Hillbraght	Fairfax		FAIRFAX		\$4,743,199	S		
4/8/2008	53037	U000-155-120,P 101, NS01, CS01		U	15	9	almed,york:ref	Blair:cas		PRINCE WILLIAM	MAHASSAS	WELLINGTON ROAD - WIDEN TO PROVIDE 4 LANE	\$6,259,310	STP	

Figure 64: 36 Month Advertisement Report Sample

### Behind Schedule Report

This report provides a list of projects with activities that are overdue (late begin or end dates).

**Note:** *Activities that started late (Actual Begin date later than Planned Begin date) will also display as an indicator to the viewer that the activity could be in jeopardy.*

### Behind Schedule Report Parameters

Report Viewer - Microsoft Internet Explorer provided by VDOT

District: Bristol, Salem, Lynchburg, Rich  
 Activity Owner: ASSET MANAGEMENT DIVISION  
 Residency: Abingdon, Accomac, Amelia, Ar  
 Program Manager: Programming Division, Local A  
 Accomplishment: CONTRACT  
 Record Type: All  
 Status: ACTIVITY DATES SET  
 Project Manager: , Abbai, Aster, Adams, Annette  
 Fund Source: 4-R, A, AAD, AAREVSHS, AC-I,  
 SYP: In SYP

View Report

Figure 65: Behind Schedule Report Parameters

**iPM - Project Activities Behind Schedule**

<b>District:</b> All	<b>Project Manager:</b> All	<b>SYP:</b> In SYP
<b>Status Code:</b> All	<b>Residency:</b> All	<b>Fund source:</b> All
<b>Accomplishment:</b> All	<b>Activity Owner:</b> All	<b>Program Group:</b> All
<b>Record Type:</b> All		

**Residency Abingdon**

<b>UPC</b> 335	<b>State Project No</b> 0660-086-149,M501	<b>Project Description</b> RTE 660 - RECONSTRUCTION
<b>District</b> Bristol	<b>Route#</b> 0660	<b>Project Manager</b> Richard Marano
<b>Accomplishment</b> CONTRACT	<b>Fund Source</b> STP	<b>Program Manager</b> Programming Division
<b>Record Type</b> project	<b>Status</b> UNSCHEDULED CONSTRUCTION	

Activity Code	Description	Activity Owner	Planned	Actual	Planned	Actual
36X	PLAN DESIGN TEAM MTG DATE		2/3/2003		2/3/2003	
48X	PUBLIC HEARING TEAM MEETING		8/1/2003		8/1/2003	

**Residency Abingdon**

<b>UPC</b> 461	<b>State Project No</b> 0802-095-213,C501	<b>Project Description</b> RTE 802 - RECONSTRUCTION
<b>District</b> Bristol	<b>Route#</b> 0802	<b>Project Manager</b> John Bolling
<b>Accomplishment</b> CONTRACT	<b>Fund Source</b> STP	<b>Program Manager</b> Programming Division
<b>Record Type</b> project	<b>Status</b> FILE MICROFILMED	

Activity Code	Description	Activity Owner	Planned	Actual	Planned	Actual
21A	MONITOR CONSULTANT L&D	LOCATION AND DESIGN	3/5/1987	9/25/1987	7/19/2001	
57S	RIGHT OF WAY STAKEOUT SURVEY	L&D SURVEY	5/16/2001		6/7/2001	
70S	UTILITY STAKEOUT SURVEY	L&D SURVEY	9/15/1998		6/7/2001	
72	PREPARE FOR ADV	SCHEDULING & CONTRACT	6/7/2001		7/25/2001	
82	CONDUCT BID OPENING	SCHEDULING & CONTRACT	9/25/2001		10/2/2001	
84	AWARD CONTRACT	SCHEDULING & CONTRACT	10/18/2001		10/19/2001	

Report Viewer - Windows Internet Explorer provided by VA IT Infrastructure Partnership

District: Bristol    Activity: 09 COUNTY/STATE AGREEMEN  
 Residency: Abingdon, Accomac, Amelia, Ar    Status: ACTIVITY DATES SET, ADVERT  
 Accomplishment: NOT APPLICABLE, CONTRACT,    Activity Owner: CONSTRUCTION, DISTRICT OF  
 Project Manager: Adams Annette, Ahlin Jennifer    Program manager: Programming Division, Local As  
 Fund Source: 4-R, A, AAD, AAREVSHS, AC-I,    Record Type: project  
 SYP: In SYP

**iPM - Project Activities Behind Sched**

District	Residency	Project Manager	UPC	Route	State Project No	Project Description	Accomplishment	Status	Fund Source	Program Manager	Record Type	Acti
Bristol	Abingdon	John Bolling	15641	0618	0618-095-P71,N501	RTE 618 - GRADE, DRAIN, STABILIZE & SURFACE TREAT	CONTRACT	FILE MICROFILMED	S	Programming Division	project	51H
Bristol	Abingdon	Richard Marano	16971	0609	0609-095-303,P101, R201, C501	RTE 609 - SPOT IMPROVEMENTS	CONTRACT	ACTIVITY DATES SET	STP	Programming Division	project	22
Bristol	Abingdon	Mark McConnell	16973	0670	0670-095-300,P101, R201, C501, B657	RTE 670 - RECONSTRUCT EXISTING PAVEMENT	CONTRACT	ACTIVITY DATES SET	S	Programming Division	project	34P
Bristol	Abingdon	Mark McConnell	16973	0670	0670-095-300,P101, R201, C501, B657	RTE 670 - RECONSTRUCT EXISTING PAVEMENT	CONTRACT	ACTIVITY DATES SET	S	Programming Division	project	36H
Bristol	Abingdon	Mark McConnell	16973	0670	0670-095-300,P101, R201, C501, B657	RTE 670 - RECONSTRUCT EXISTING PAVEMENT	CONTRACT	ACTIVITY DATES SET	S	Programming Division	project	36P
Bristol	Abingdon	Mark McConnell	16973	0670	0670-095-300,P101, R201, C501, B657	RTE 670 - RECONSTRUCT EXISTING PAVEMENT	CONTRACT	ACTIVITY DATES SET	S	Programming Division	project	44
Bristol	Abingdon	Richard Marano	18384	1717	1717-095-273,P101, R201, C501	RTE 1717 - RECONSTRUCT EXISTING ROADWAY	CONTRACT	STORAGE (INACTIVE)	S	Programming Division	project	48

Figure 66: Behind Schedule Report Samples

Notice the one page per project versus the spreadsheet format.

## Open Activity Report

This report allows the user to view projects that have open or incomplete activities.

### Open Activity Report Parameters

The screenshot shows a web-based form titled "Report Viewer - Microsoft Internet Explorer provided by VDOT". The form contains several dropdown menus and input fields for filtering data. The parameters are as follows:

- District: Bristol, Salem, Lynchburg, Rich
- Residency: Abingdon, Accomac, Amelia, Ar
- Accomplishment: NOT APPLICABLE, CONTRACT,
- Status: ACTIVITY DATES SET, ADVERT
- Project Manager: , Abbai, Aster, Adams, Annette
- SYP: In SYP
- Begin Date (ex.xx/xx/xxxx): 05/01/2008
- Road System: Enhancement, Interstate, Misc
- Activity Owner: ASSET MANAGEMENT DIVISION
- Program Manager: Programming Division, Local As
- Record Type: budget, project
- Fund Source: 4-R, A, AAD, AAREVSHS, AC-I,
- UPC: (empty)  NULL
- End Date (ex.xx/xx/xxxx): 05/31/2008

Figure 67: Open Activity Report Parameters

A single project can be viewed using the UPC input filter.

**Note:** Only the Begin and End Date filters work in conjunction with the UPC filter.

The screenshot shows the "iPM - Open Activity Report" interface. It includes a navigation bar at the top with "1 of 25" items, a search bar, and an "Export" button. Below the navigation bar is a summary table of filter settings:

District: All	Project Manager: All
Status: All	Residency: All
Accomplishment: All	Upc: No UPC is selected
Road System: All	Date Range: 5/1/2008 through 5/31/2008
Activity Owner: All	Record Type: budget,project
Fund Source: All	Program Mgr: All
SYP: In SYP	

Below the summary table, the report lists individual projects. The first project shown is:

- UPC:** 293
- State Project Ilo:** 0614-084-154,P103, R203, C503
- Project Description:** RTE 614 - RECONSTRUCTION
- Funding:** STP
- District:** Bristol
- Project Manager:** Dennis Harris
- Road Name:** YUMA ROAD
- Status:** UNSCHEDULED CONSTRUCTION
- #Parcels:** 0
- Parcels Clear:** 0
- #Utility Relocations:** 0
- Utility Relocations Clear:** 0
- #Relocations:** 0
- Relocations Clear:** 0
- Record type:** project

The activity details for this project are:

Activity	Description	Function	Planned Begin Date	Planned End Date	Actual Begin Date	Actual End Date
11Z	RTE 614 - RECONSTRUCTION	PROGRAMMING	3/24/2008	5/23/2008		

The second project shown is:

- UPC:** 312
- State Project Ilo:** 0753-084-P38,N501
- Project Description:** RTE 753 - RECONSTRUCT & SURFACE TREAT NON-HARDSURFACED ROAD
- Funding:** S
- District:** Bristol
- Project Manager:** Ronald Flanary
- Road Name:** BEE LINE
- Status:** STORAGE (INACTIVE)
- Length:** 0.60Miles
- Ad Date:**
- Fund Source:** S
- Program Manager:** Programming Division
- Route#:** 0753
- #Parcels:** 0
- Parcels Clear:** 0
- #Utility Relocations:** 0
- Utility Relocations Clear:** 0
- #Relocations:** 0
- Relocations Clear:** 0
- Record type:** budget

The activity details for this project are:

Activity	Description	Function	Planned Begin Date	Planned End Date	Actual Begin Date	Actual End Date
11Z	RTE 753 - RECONSTRUCT & SURFACE TREAT NON-HARDSURFACED ROAD	PROGRAMMING	5/1/2008	6/30/2008		

Figure 68: Open Activity Report Sample

## Over Budget Report

The Over Budget Report displays all projects with expenditures exceeding the estimates for a particular phase of a project. The report includes a percent comparison of the Recommended Estimate and Expenditures for each phase of the selected projects.

### Over Budget Report Parameters

Report Viewer - Microsoft Internet Explorer provided by VDOT

District: Salem Record Type: budget, project View Report

Residency: Abingdon, Accomac, Amelia, Ar Program Manager: Programming Division, Local As

Accomplishment: NOT APPLICABLE, CONTRACT Fund Source: 4-R, A, AAD, AAREVSHS, AC-I

Status: ACTIVITY DATES SET SYP: In SYP

Project Manager: , Abbai, Aster, Adams, Annette

Figure 69: Over Budget Report Parameters

### iPM - Projects Over Budget

District: Salem		Residency: All		Status: ACTIVITY DATES SET	
Project Manager: All		Accomplishment: All		Fund Source: All	
Record Type: budget		Program Manager: All		SYP: In SYP	

**Residency Bedford**

UPC	8880	State Project Ilo	0221-009-V10,P102, R202		Project Description	RTE 221 - DEVELOP TO 4 LANES(PE & RW ONLY)				
District	Salem	Route#	0221	Project Manager	Edward Myers	Status	ACTIVITY DATES SET		Ad Date	
Accomplishment	CONTRACT		Fund Source	STP	Program Manager	Programming Division		RecordType	budget	
	PE	%	RW	%	CN	%	Total		%	
	Estimate	Expend	Estimate	Expend	Estimate	Expend	Estimate	Expend		
	\$3,200,000	\$3,236,709	101 %	\$3,370,411	\$3,249,912	96 %	\$0	\$0	0 %	\$6,570,411 \$6,486,621 99 %

**Residency Christiansburg**

UPC	8784	State Project Ilo	0676-035-P88,N501		Project Description	RTE 676 - RECONSTRUCT & SURFACE TREAT NON-HARDSURFACED ROAD				
District	Salem	Route#	0676	Project Manager	Christopher Price	Status	ACTIVITY DATES SET		Ad Date	12/28/2010
Accomplishment	SAAP CONTRACT		Fund Source	S	Program Manager	Programming Division		RecordType	project	
	PE	%	RW	%	CN	%	Total		%	
	Estimate	Expend	Estimate	Expend	Estimate	Expend	Estimate	Expend		
	\$7,500	\$10,788	144 %	\$17,000	\$0	0 %	\$600,000	\$0	0 %	\$624,500 \$10,788 2 %

Figure 70: Over Budget Report Sample

The **Recommended Estimate** can be viewed in PCES by expanding the PD-1 tab for a specific project. The Expenditure amount is from FMS.

## Project Activity Report

The Project Activity Report displays **all** activities for projects, based on the filters selected. To display an individual project, the user can select a UPC and a date range using the Begin and End Date filters.

The screenshot shows a web browser window titled "Report Viewer - Microsoft Internet Explorer provided by VDOT". The interface contains several filter fields:

- District:** Bristol, Central Office, Culpepe
- Residency:** Abingdon, Accomac, Amelia, Ar
- Accomplishment:** NOT APPLICABLE, CONTRACT
- Status:** NOT IN CURRENT SYP, STUDY
- Project Manager:** , Abbai, Aster, Adams, Annette
- Fund Source:** 4-R, A, AAD, AAREVSHS, AC-I
- Begin Date (ex.xx/xx/xxxx):** 5/1/2008
- SYP:** In SYP
- Road System:** Enhancement, Interstate, Misc
- Activity Owner:** ASSET MANAGEMENT DIVISION
- Activity:** 09 COUNTY/STATE AGREEMEN
- Program Manager:** Programming Division, Local As
- Record Type:** budget
- UPC:** (empty field) with a checked "NULL" checkbox
- Ending Date (ex.xx/xx/xxxx):** 5/31/2008

At the bottom of the form, there are navigation controls: "1 of 7", "100%", "Find | Next", "Select a format", and "Export".

Figure 71: Project Activity Report Parameters

The screenshot shows the "iPM - Project Activity Report" interface. At the top, there is a summary table with the following filters:

<b>District:</b> All	<b>Project Manager:</b> All	<b>Status:</b> All
<b>Residency:</b> All	<b>Accomplishment:</b> All	<b>Activity Owner:</b> All
<b>Date Range:</b> 5/1/2008 through 5/31/2008	<b>Road System:</b> All	<b>UPC:</b> No UPC is selected
<b>Activities:</b> All	<b>SYP:</b> In SYP	<b>Program Group:</b> All
<b>Fund source:</b> All	<b>Record Type:</b> budget	

Below the summary table, the report is divided into sections for two projects:

**Residency: Amelia**

**UPC:** 82167 **State Project No:** 0645-004-P11,P101,N501 **Project Description:** RECONSTRUCT INTERSECTION **Adv Date:** 6/13/2008

**Fund Source:** S **District:** Richmond 0645 **Record Type:** budget **Project Manager:** Dianna Bryant **Road Name:** WEST SOAP STONE ROA

**Route#:**

**Length:** 0.15 Miles **Accomplishment:** STATE FORCES **Program Manager:** Programming **Status:** ACTIVITY DATES SET

**#Parcels:** **Parcels Clear:** **#Utility Relocations:** **Utility Relocations Clear:** **#Relocations:** **Relocations Clear:**

Activity	Description	Function	Planned	Actual	Planned	Actual
79	CN AUTH OR ADV FUNDING REVIEW	PROGRAMMING	5/1/2008		5/16/2008	

**Residency: Appomattox**

**UPC:** 84372 **State Project No:** 0722-015-P03,P101,N501 **Project Description:** RTE 722 - PAVE-IN-PLACE SURFACE TREATMENT **Adv Date:** 5/30/2008

**Fund Source:** S **District:** Lynchburg 0722 **Record Type:** budget **Project Manager:** Clayton Thomas **Road Name:** TOBACCO LANE

**Route#:**

**Length:** 0.42 Miles **Accomplishment:** STATE FORCES **Program Manager:** Programming **Status:** ACTIVITY DATES SET

**#Parcels:** **Parcels Clear:** **#Utility Relocations:** **Utility Relocations Clear:** **#Relocations:** **Relocations Clear:**

Activity	Description	Function	Planned	Actual	Planned	Actual

Figure 72: Project Activity Report Sample

## Project Advertisement Report

The Project Advertisement Report selects projects for display based on the existence of activity 80 with no Actual End Date. The report will provide the user with a list of projects that are scheduled for advertisement but not yet advertised and a choice to display all activities associated with the project.

Report Viewer - Microsoft Internet Explorer provided by VDOT

District: Bristol, Central Office, Culpepe  
 Residency: Abingdon, Accomac, Amelia, Ar  
 Accomplishment: NOT APPLICABLE, CONTRACT  
 Status: ACTIVITY DATES SET, ADVERT  
 Project Manager: Abbai, Aster, Adams, Annette  
 Record Type: budget, project  
 SYP: In SYP  
 Begin Date (ex.xx/xx/xxxx): 6/1/2008

Road System: Enhancement, Interstate, Misc  
 Activity Owner: ASSET MANAGEMENT, CONSTR  
 Bridge: Yes, No  
 Show Activities?: Yes  
 Program Manager: Programming Division, Local As  
 UPC:  NULL  
 Fund Source: 4-R, A, AAD, AAREVSHS, AC-I  
 Ending Date (ex.xx/xx/xxxx): 6/30/2008

View Report

Figure 73: Project Advertisement Report Parameters

Report Viewer - Microsoft Internet Explorer provided by VDOT

### IPM - Project Advertisement Report

District: All	Project Manager: All	Status: All
Residency: All	Accomplishment: All	Activity Owner: All
Road System: All	UPC: No UPC is selected	Bridge: All
Record Type: project	Fund Source: All	Program Manager: All
Date Range: 6/1/2008 through 6/30/2008		SYP: In SYP

UPC	Ad Date	State Proj No	District	Residency	Accomplishment	Route	Project Manager	Fund Source
2530	06/10/2008	0631-002-128,C502, B612, B657	Culpeper	Charlottesville	CONTRACT	0631	g.krystyniak	S

Status	System	CII Estimate	County	City/Town	Limit From	Limit To
ACTIVITY DATES SET	Secondary	12,235,103	ALBEMARLE		INTERSECTION MELBOURNE ROAD	0.0863 MILE NORTH OF NORFOLK SOUTHERN RAILWAY

Record Type	Program Manager	Project Description
project	Programming Division	RTE 631 - 2 LANE ON 2 LANE ROW, 4 LANE ON RELOCATED RIO ROAD

Activity	Activity Description	Activity Owner	Begin Date		End Date	
			Planned	Actual	Planned	Actual
41	BRIDGE FOUNDATION DATA	MATERIALS	11/01/04	11/05/07	08/30/05	11/05/07
43	UTILITY F.I. PLANS	LOCATION AND DESIGN	11/01/04	11/05/07	03/01/05	11/05/07
44	RAW&UT DATA-HEARING/PUBLIC INV	RIGHT OF WAY & UTILITIES DIVISION	04/07/97	02/24/99	05/21/97	05/05/99
46C	PRELIMINARY BRIDGE PLANS CO	STRUCTURE & BRIDGE DIVISION	10/01/04	11/05/07	06/30/05	
46H	H&H ANALYSIS BRIDGE/STRUCTURES	LOCATION AND DESIGN	11/01/04	11/05/07	05/31/05	
48	LOCATION/DESIGN HEARING	LOCATION AND DESIGN	06/01/05	01/03/04	09/30/05	07/27/04
49	ADAPT LOCATION DESIGN	LOCATION AND DESIGN	08/03/05	07/27/04	10/31/05	09/11/04

Figure 74: Project Advertisement Report Sample

## Project List Report

The Project List Report is an index of projects from which the user can list the desired project or group of projects with the pertinent project information including estimates. The last page of the report is a summary and total of all the reported projects sorted by road system.

Figure 75: Project List Report Parameters

1 of 36 100% Find | Next Select a format Export

### iPM - Project List Report

<b>District:</b> Salem		<b>Project Manager:</b> All		<b>Status:</b> All	
<b>Accomplishment:</b> All		<b>Residency:</b> All		<b>County:</b> All	
<b>UPC:</b> No UPC is selected		<b>Road System:</b> All		<b>Bridge:</b> All	
<b>Program Group:</b> All		<b>SYP:</b> In SYP		<b>Fund source:</b> All	
<b>Record Type:</b> budget					

UPC	Description	From	To	Status	
615	RTE 653 - MINOR WIDENING AND RESURFACING OF EXISTING ROADWAY	1.10 MI. S. RTE 609 W. INT. TO 1.87 MI. S. RTE 609 W. INT.	2.28 MI. S. RTE 609 W. INT. TO 2.8 MI. S. RTE 609 W. INT.	CONSTRUCTION STARTED	
<b>District</b>	<b>Residency</b>	<b>Project Manager</b>	<b>County</b>	<b>City/Town</b>	
Salem	Christiansburg	Christopher Price	PULASKI		
<b>Accomplishment</b>	<b>Scope Of Work</b>	<b>Estimates</b>			
STATE FORCES	RESURFACING	PE 4,000			
<b>Fund Source</b>	<b>Road System</b>	<b>PTF</b>	<b>GF</b>	<b>Pri #</b>	
S	Secondary	N	N		
<b>Area Location</b>	<b>Project Type</b>	<b>RW</b>			
Rural	NO PLAN,SECONDARY	0			
<b>Award Date</b>	<b>Functional Class</b>	<b>Length</b>	<b>Route</b>	<b>State Project No</b>	
	RURAL LOCAL	1.2900 Miles	0653	0653-077-134,P101, N502	
<b>Total</b>	254,000				
<b>Program Manager</b>	<b>Record Type</b>	<b>Expenditures</b>	<b>Adv Date</b>		
Programming Division	budget	230,082	06/26/2007		

UPC	Description	From	To	Status
726	RTE 728 - RURAL RUSTIC RD (SURFACE TREAT NON-HARDSURFACE RD)	ROUTE 739	0.50 MILE SOUTH ROUTE 739	UNSCHEMULATED CONSTRUCTION
<b>District</b>	<b>Residency</b>	<b>Project Manager</b>	<b>County</b>	<b>City/Town</b>
Salem	Rocky Mount	Leo Whitenack	FRANKLIN	
<b>Accomplishment</b>	<b>Scope Of Work</b>	<b>Estimates</b>		
STATE FORCES	RESURFACING	PE 11,000		

Figure 76: Project List Report Sample 1

### Project List Report - the last page:

Summary		Road System					
		Interstate	Miscellaneous	Primary	Secondary	Urban	Total
Federal	PE	22,495,029	1,035,280	46,471,327	752,887	13,421,464	84,175,987
	RW	2,754,351	0	44,189,785	30,587	15,006,055	61,960,778
	CN	97,854,410	600,000	60,290,654	4,772,817	109,233,814	272,751,695
State	PE	0	0	32,047,194	2,070,954	1,293,364	35,411,512
	RW	0	0	43,575,978	1,498,996	2,051,846	47,126,820
	CN	0	147,000	445,251,220	25,211,708	8,363,726	476,993,654
Total	PE	22,495,029	1,035,280	78,518,521	2,823,841	14,714,828	119,587,499
	RW	2,754,351	0	87,765,763	1,529,583	17,057,901	109,107,598
	CN	97,854,410	747,000	505,541,874	29,984,525	117,617,540	751,745,349

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This summary view is not available when you export to Excel.

Figure 77: Project List Report Sample 2

### Over Budget/Behind Schedule Report

The Over Budget/Behind Schedule Report provides a list of projects that have both late tasks *and* expenditures that are greater than the estimate for a particular phase.

Report Viewer - Microsoft Internet Explorer provided by VDOT

District: Bristol, Salem, Lynchburg, Rich  
 Record Type: budget, project  
 View Report

Residency: Abingdon, Accomac, Amelia, Ar  
 Program Manager: Programming Division, Local As

Accomplishment: CONTRACT  
 Fund Source: 4-R, A, AAD, AAREVSHS, AC-I,

Status: ACTIVITY DATES SET  
 SYP: In SYP

Project Manager: Abbai, Aster, Adams, Annette,

Figure 78: Over Budget/Behind Schedule Report Parameters

1 of 5 100% Find | Next Select a format Export

### iPM - Projects Over Budget/Behind Schedule

<b>District:</b> All	<b>Residency:</b> All	<b>Status:</b> ACTIVITY DATES SET
<b>Project Manager:</b> All	<b>Accomplishment:</b> All	<b>Fund Source:</b> All
<b>Record Type:</b> All	<b>Program Manager:</b> All	<b>SYP:</b> In SYP

**Residency** Abingdon

---

**UPC:** 75250    **State Project No:** EN04-140-106,P101, R201, C501    **Project Description:** TOWN OF ABINGDON - DEPOT SQUARE PEDESTRIAN SAFETY RENOV.  
**District:** Bristol    **Route#:** EN04    **Project Manager:** Eddie Stamper    **Status:** ACTIVITY DATES SET    **Ad Date:** 3/24/2008  
**Accomplishment:** COUNTIES, DEVELOPERS, ETC.    **Fund Source:** STP    **Program Manager:** Local Assistance Division    **RecordType:** budget

Activity Code	Description	Activity Owner	Begin Date		End Date	
			Planned	Actual	Planned	Actual
79	CN AUTH OR ADV FUNDING REVIEW	PROGRAMMING	2/23/2008		3/24/2008	
80	ADVERTISE PROJECT.BEGIN CN	SCHEDULING & CONTRACT	3/24/2008		3/24/2008	

PE		RW		CN		Total					
Estimate	Expend	Estimate	Expend	Estimate	Expend	Estimate	Expend				
\$0	\$90,696	1,000 %	\$0	\$0	0 %	\$540,904	\$205,872	38 %	\$540,904	\$296,568	55 %

**Figure 79: Over Budget/Behind Schedule Sample**

## Pending Project Revision Alert

### Pending Project Revision

When a project has a revision pending a red bar with 'Revision Pending' will appear on the iPM Project Information page. Clicking on the red bar will take you directly to the revision in the Project Pool.

 <b>Note:</b>	<i>Only one project information revision or job number revision may be pending for a project at any given time. The pending revision must be 'Approved' or 'Rejected' before another revision of the sametype can be submitted for the project. The system <b>will</b> allow a pending job number <b>and</b> a project information revision at the same time.</i>
--	---



The screenshot shows the iPM interface for project 91791. At the top is the Virginia Department of Transportation logo and the slogan 'We Keep Virginia Moving'. Below this is a navigation bar with icons for POOL, iPM, PCES, SCHEDULE, SYP, DASHBOARD, and MAP. A search bar contains 'UPC: 91791'. The main content area has tabs for Project Information, Project Documents, Communication & Divisions, and Action Items. A prominent red bar with the text 'Revision Pending' is displayed. Below this is a 'Summary' section with the following details:

UPC	91791	State Project #	0630-097-R09
Project Purpose	Sight Distance Improvement	Sponsor	<a href="#">Tilman Branson</a>
Project Coordinator	<a href="#">Brandon Bennett</a>	Scope of Work	MINOR WIDENING
Description	Sight Distance Improvement		

Figure 80: Pending Revision Alert Example

## My iPM

My iPM is selected by clicking **myiPM** tab on the iPM main page.

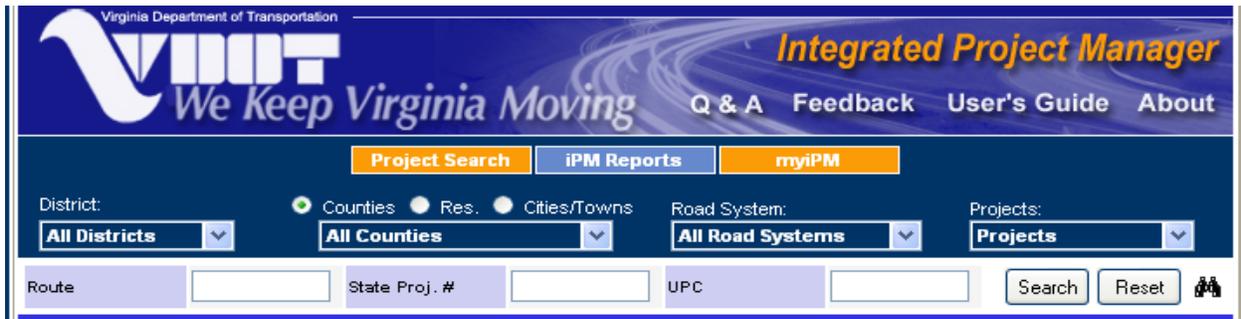


Figure 81: My iPM Selection

My iPM will open in a new window and display the number of projects that the project manager has with expired estimates/over budget, Dashboard status, PD-1 approval and late tasks.



Figure 82: My iPM Display Window

**The My iPM Expired Estimate, Dashboard Status, PD-1 Approval and Behind Schedule reports:**

- Project workflow = 'Active' and in the Six Year Program
- Does not include projects tagged 'awaiting financial closure in the SYP'
- Does not include 'Budget' record type
- Uses the PCES Recommended estimate and Recommended estimate date
- Is linked in PCES

**Dashboard Feedback – (Under Development)**

## Appendix A – Business Definitions

Term	Definition
Accomplishment.....	Describes the method in which the project construction will be executed
Ad Date.....	The Ad date is the date that the project advertises. This date must be the same as the Pool – CN Start date, and the same as the Schedule – planned end date for activity 80, unless an actual end date exists. If an actual end date for activity 80 exists, then this date becomes the ad date.
Area Location .....	First part of the FHWA data number, describes the population of the area in a range, based on population counts from the latest census.
Awarded.....	Date that the CTB, District , or Jurisdiction selected a contractor
Clear* .....	Total number of right of way parcels cleared for advertisement
Construction Completed .....	Date that construction is complete on a project, not project close out. Date populates from TRNS.PORT for contract projects. For non-contract projects, the Project Manager is responsible for entering the C-5 dates in the Project Pool.
Construction Fund Source ...	Code added by the funding group that indicates the source of the funds
Construction Started .....	Date entered by a Project Manager from the C-5 indicating the date that the construction has begun on a project. Date populates from TRNS.PORT on contract projects.
Contract Execution .....	Date that the contract is signed by both VDOT and the contractor
Contract Letting .....	Date that bids are received and opened by VDOT
Count Date (traffic).....	The date on which the Traffic Count was taken
County.....	The County, which represents the jurisdiction in which the project takes place
Description (Project).....	A textual narrative briefly describing the project (for quick identification and reference purposes)
Designer (traffic).....	Traffic Engineering individual responsible for the coordination of the signs/signals/pavement markings of the project
District .....	The primary district where the project is located
Estimated Construction Completion .....	Projected date that work is anticipated to end at the site, not project close out
Expenditures: CN.....	Expenditures for the Construction phase of the project originating from the Financial Management System (FMS)
Expenditures: PE.....	Expenditures for the Preliminary Engineering phase of the project originating from the Financial Management System (FMS)
Expenditures: RW.....	Expenditures for the Right of Way phase of the project originating from the Financial Management System (FMS)
Expenditures: Total.....	Total Expenditures for the PE, RW and CN phases of the originating from the Financial Management System (FMS)
Federal Oversight.....	FHWA is a team member and participates in all team meetings and milestone approvals
Federal Structure #.....	(Same as “Project Federal Structure #) For a new structure, this is a 5-digit number assigned by the District Structure and Bridge Section. The bridge will be associated with this number for as long as it is in service. Within the entire state, this number is unique to the project bridge. For a bridge widening or bridge rehabilitation project, this would be the same number as the Existing Federal Structure ID # for the existing bridge
Federal System.....	The project is either part of the National Highway System or it is not (NHS)

Term	Definition
FHWA 534 Number.....	A number combination derived from the Area Location, Functional Classification, National Highway System and Scope for the project
From (location) .....	The location of the starting point of the project
Functional Classification .....	Second part of the FHWA data number, describes the principle use of the road in the highway system
Fund Type.....	Indication of federal(P-Participating) or state (S-State) funded
H & HA.....	Hydrologic and Hydraulic Analysis- Performed for a proposed highway embankment or other encroachment into the floodplain of a major waterway and for a bridge or other major structure over a major waterway and/or where a flood insurance study or other officially designated or delineated floodplain is concerned
Job #.....	Numbers identifying jobs that relate to each of the phases of a project
Length.....	A measurement expressing the distance between the starting point (From Location) to the finish point (To Location) and should include measurement indicators (Miles, Kilometers.)
NTP (Partial Takes)* .....	Date: Notice to Proceed to acquire parcels involving partial takes issued by Right of Way Division
NTP (Total Takes)* .....	Date: Notice to Proceed to acquire total take parcels issued by Right of Way Division
Number* .....	Total active number
Order Number(s).....	The Order number is assigned at advertisement by Scheduling & Contracts Division and entered in TRNS.PORT
Parcels.....	Land on which right of way or easements are required for project
Pavement Marking/ Sign Plans .....	Comments indicating if the plans are being accomplished in house or by contract, and includes reviewer's name and contractor's name
Phase .....	This indicates the three main phases in project development, Preliminary Engineering (design), Right of Way (acquisition of property, incidental RW payments and utilities), and Construction
Project Manager.....	The person named to be responsible for the management of the project scope, schedule and budget.
Project Status .....	Project Status is the working status of the project (activity dates set, construction started, etc.)
Recommended Estimates: CN.....	Construction phase dollar figure recommended estimate originating from the Project Cost Estimating System (PCES)
Recommended Estimates: PE.....	Preliminary Engineering phase dollar figure recommended estimate originating from the Project Cost Estimating System (PCES)
Recommended Estimates: RW.....	Right of Way phase dollar figure recommended estimate originating from the Project Cost Estimating System (PCES)
Recommended Estimates: Total	The total of any PE, RW and CN dollar figure recommended estimates originating from the Project Cost Estimating System (PCES)
Relocations .....	Families/businesses that need to be relocated for project construction
Road System .....	Drop down division of funding groups e.g. primary, urban, secondary, etc
Route.....	The number assigned to the road where the project will take place. This value is part of the state project number
RUMS Remarks.....	Comments from the RUMS Project Status screen
Schedule Type .....	Type of schedule used on a project (No Plan, Minimum Plan, One Hearing or Two

Term	Definition
	Hearing)
Sequence of Construction ....	Comments on the Traffic Engineering information screen about the proposed Sequence of Construction
Sequential Number .....	The Sequential Number is part in the state project number. In some cases the Section Number is changed from what is assigned in the Project Pool.
Signal Designer.....	The Name of the individual that designed the signal plans
Signal Plans .....	Comments indicating if the plans are being accomplished in house or by contract, and includes reviewer's name and contractor's name
Signals By .....	The individual that designed the signal plans or signals designer
Soils Report .....	The field that displays the completion date of the soils report by the Materials Division.
Stage .....	The concurrent engineering phase consisting of Pre-Scope, Scope, PFI, Public Hearing, FI, PAC and Construction.
State Project #.....	The state project number is 10 alphanumeric characters long, with a format of XXXX-XXX-XXX (Route, County/City, Section).
Street Name .....	Street Name, on which the project is to take place
StrucFoundData .....	Completion date of the structural foundation data report (completed for bridges and other large structures).
SYP Estimates: CN.....	Construction phase dollar estimate originating from the Six Year Program (SYP)
SYP Estimates: PE.....	Preliminary Engineering phase dollar estimate originating from the Six Year Program (SYP)
SYP Estimates: RW .....	Right of Way phase dollar estimate originating from the Six Year Program (SYP)
SYP Estimates: Total.....	The total of any PE, RW and CN dollar estimate originating from the Six Year Program (SYP)
TE File .....	Storage location of the Traffic Engineering plan sheets
TE Comments .....	Project notes regarding schedule changes and other information from Program Day meetings
To (location) .....	The location of the finish point of the project
Town/City .....	The Town or City, which represents the jurisdiction in which the project takes place
Traffic Count .....	A count or estimate of traffic passing through the intended project area
UPC.....	The unique identification number the FMSII system assigns to projects. This number is used across the enterprise to identify projects and is only assigned to one project.
Utility Relocations .....	Utility company facilities that need to be relocated for project
VTA_GF .....	Y or N indicator that the project is funded by an action of the general assembly using general funds
VTA_PTF .....	Y or N indicator that the project is funded by an action of the general assembly using funds earmarked for priority projects

\* Column information that pertains to each row

## Appendix B – Page to Source Table

Group Name	Field Name	Source of Input
	Ad Date	pool
	Description	pool
	District	pool
	Project Manager	pool
	Residency	pool
	Route	pool
	State Project #	pool
	UPC	FMS (pool for Tupcs)
Action Items	Date Cleared	IPM
Action Items	Date Entered	IPM
Action Items	Description	IPM
Action Items	Owner	IPM
Communication	(team member function)	IPM
Communication	(team member name)	IPM
Communication	(team member telephone)	IPM
Communication	Held/Expired	IPM
Communication	Meeting	IPM
Communication	Planned	IPM
Communication	Parcels	RUMS
Communication	Relocations	RUMS
Communication	Utility Relocations	RUMS
Construction Project Events	Awarded	Transport/pool
Construction Project Events	Construction Completed	Transport/pool
Construction Project Events	Construction Started	Transport/pool
Construction Project Events	Contract Execution	Transport/pool
Construction Project Events	Contract Letting	Transport/pool
Construction Project Events	Estimated Construction Completion	Transport/pool
Division	Date	IPM
Division	Message	IPM
Division	Name	IPM
Division	Type	IPM
Document	Category	IPM
Document	Description	IPM
Document	Name	IPM
Document	Phase	IPM
Document	Status	IPM
Estimates and Expenditures	Expenditures: CN	FMS
Estimates and Expenditures	Expenditures: PE	FMS
Estimates and Expenditures	Expenditures: RW	FMS
Estimates and Expenditures	Expenditures: Total	FMS
Estimates and Expenditures	Live SYIP Estimates: CN	SYP
Estimates and Expenditures	Live SYIP Estimates: PE	SYP
Estimates and Expenditures	Live SYIP Estimates: RW	SYP
Estimates and Expenditures	Live SYIP Estimates: Total	SYP

Group Name	Field Name	Source of Input
Estimates and Expenditures	PCES Recommended Estimates: CN	PCES / Pool
Estimates and Expenditures	PCES Recommended Estimates: PE	PCES / Pool
Estimates and Expenditures	PCES Recommended Estimates: RW	PCES / Pool
Estimates and Expenditures	PCES Recommended Estimates: Total	PCES / Pool
Images & Videos	Description	IPM
Images & Videos	Name	IPM
Location	County	pool
Location	District	pool
Location	From	pool
Location	Street Name	pool
Location	To	pool
Location	Town/City	pool
Plan Drawings (FALCON)	Description	Falcon
Plan Drawings (FALCON)	Filename	Falcon
Plan Drawings (FALCON)	Last Modified Date	Falcon
Programming	Accomplishment	pool
Programming	Area Location	pool
Programming	Construction Fund Source	pool
Programming	Federal Oversight	pool
Programming	Federal System	pool
Programming	Functional Classification	pool
Programming	Fund Type	pool
Programming	Order Number(s)	Transport
Programming	Program Manager	pool
Programming	Project Status	pool
Programming	Record Type	pool
Programming	Schedule Type	pool
Programming	Sequential Number	pool
Programming	VTA_GF	pool
Programming	VTA_PTF	pool
Programming	Workflow	pool
Project Details	Count Date	pool
Project Details	Length	pool
Project Details	Road System	pool
Project Details	Traffic Count	pool
Project Summary Reports	Author	IPM
Project Summary Reports	Created Date	IPM
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