6. CATEGORIES

Trns.port uses categories to separate items of work into specific groups. Before you can add your items (quantities) and funding, categories must be created.

A separate category must be created for these areas of criteria**:**

NOTE: Field Office is now included in the regular Bid Category (0100)

- o Items having the same Funding Source
- o Utility Relocation, Utility Inspector
- o State Forces
- o Demotion of Buildings (Clearing of Parcels, Closing Wells, Removal of Underground Storage Tanks, Removal of Asbestos)
- o Betterment
- o Lump Sum CEI
- o Contract Requirements
- o Lump Sum Contingency

Categories are identified with a four-digit number. It is imperative that the following numbering scheme be followed:

- o Regular bid items: 0100, 0200, 0300, 0400, etc.
- o Non-bid items (i.e. State Forces, Utility Inspector, Railway): 2000-2999
- o Lump Sum CEI: 3001
- o Contract Requirements: 3002
- o Lump Sum Contingency: 3003

6.1 Adding a Category

To create the category, first locate the project in the Project List. ![icon] Right-click on the project and select **Tabbed Folder Change**. Trns·port displays the tabbed folder. Click on the Categories tab.

The top part of the Categories tab contains a list of all existing categories associated with the project. The bottom part of the Categories tab contains detail information for the category currently selected in the list. To add a category, right-click within the window and select **Add**. Trns·port adds a blank row to the list of categories. You can enter data about the new category into the blank fields displayed in the detail area of the Categories tab.
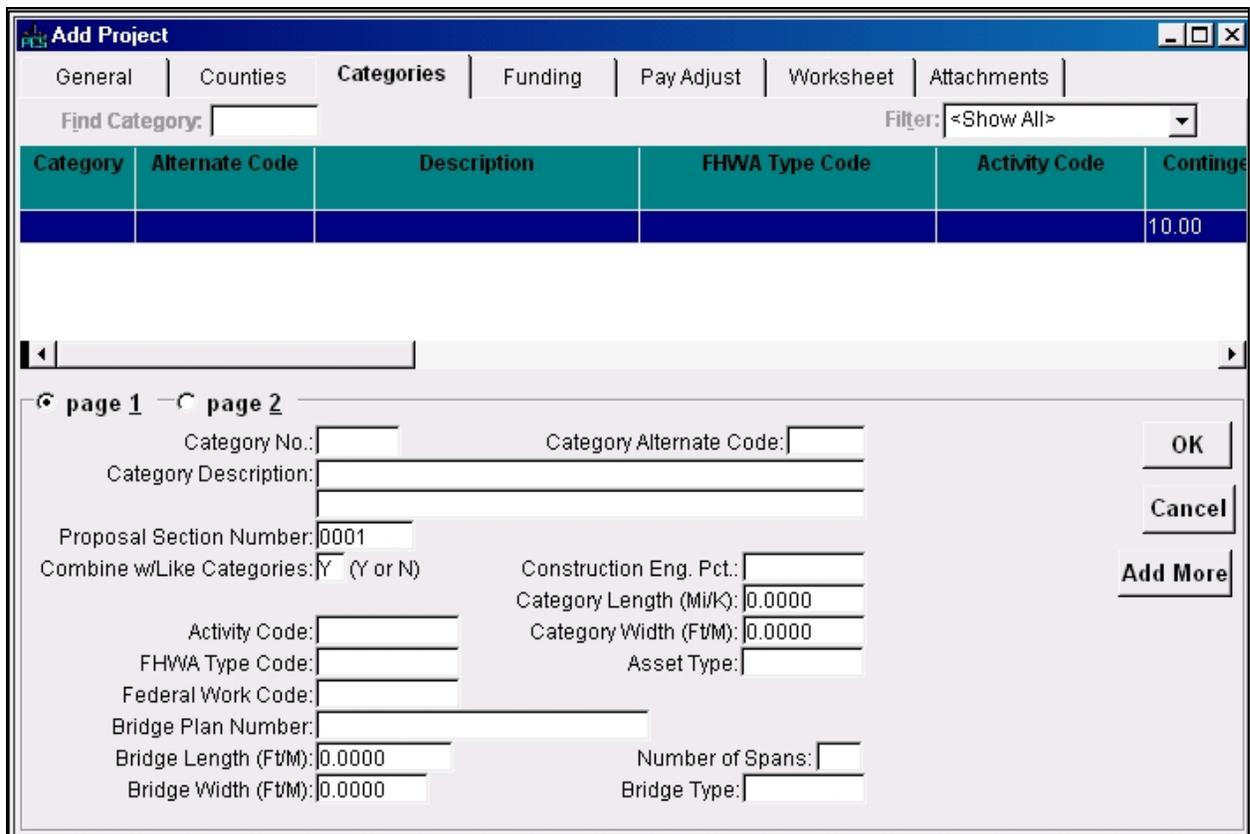
The required fields are: Category No., Category Description

Category No.: Enter the unique 4-digit category number. Use the following format as you number the categories:

Regular bid items including field office in 0100: 0100, 0200, 0300, 0400, etc.

Non-bid items (i.e. State Forces, Utility Inspector, Railway): 2000-2999

Lump Sum CEI (3001)

Contract Requirements (3002)

Lump Sum Contingency (3003)

Note that when the estimate is printed, the categories will be arranged numerically; therefore, some thought should be given to the category numbers assigned.

For Bid Options or Alternates: The Scheduling and Contracts Division plan review section will be responsible for building the bid options/alternates when necessary.

Combine With Like Categories: Defaults to "Y" and should not be changed. Program combines several different categories (as long as the funding source and funding percents are the same) into a single proposal section.

Activity Code: Choose appropriate value from the drop-down menu. This table consists of type of items and/or work to be performed within this category classification. **The Engineering Divisions will almost always use 631 or 731**. Exceptions are as follows: for Utilities, use 656 or 756; for Demolition of Buildings, use 668 or 768. Select other values as appropriate.

FHWA Type Code: Choose appropriate value from the drop-down menu. This table consists of specific Federal Work Type codes.

Federal Work Code: Choose appropriate value from the drop-down menu.

Construction Eng. Pct: The percent that was entered at the Project level (on the General tab) will default to the category level; therefore, this field may be left blank unless a different percent is desired. (See **3.2 Adding a Project** for construction engineering percentages.). **If a CEI percentage is entered at the category level, it overrides the project level.**

Note: If you are creating a category for Lump Sum CEI or Contract Requirements, you must enter 0.00 in this field.

Lump Sum Construction Engineering: You are encouraged to utilize the lump sum construction engineering item code 25580 as a non bid item in category 3001 on your Trns·port estimate to capture your lump sum construction engineering costs. The District Construction or Maintenance Staff can assist you when calculating this amount.
If there is more than one federal project number, the CE cost should be allocated to each federal project. The cost may be divided among other PCN's, if the Project Manager desires.

This lump sum CE amount will be reflected on the Fund Distribution Sheet.

ITEM	DESCRIPTION	UNITS	SPEC YEAR		SPECIFICATIONS
25580	CONSTRUCTION ENGINEERING	TEC	08	Metric	CONST. ENGR.
25580	CONSTRUCTION ENGINEERING	TEC	07	Imperial	CONST. ENGR.

TRNS*PORT Instructions:

1. Set Item Code Table to 08 (Metric) or 07 (Imperial)
2. Set the CE percentage for each project and category to (0) zero
3. Create a category titled "Construction Engineering" for non-bid items with a category number 3001 (See PES Manual Chapter 6)
4. For this category set CE percentage to (0) zero
5. For this category set Contingency percentage to (0) zero
6. Add funds to category (See PES Manual chapter 7)
7. Add standard item number 25580 Construction Engineering (See PES Manual chapter 8)
8. Insert the Total Estimated Cost (TEC) in the Estimated Unit Price field
9. Enter (1) in Estimate Quantity field
10. Select "Y" for Non-Bid Item
11. Select "E" for Source of Price
12. Select "Y" for Estimated Price Lock
13. Assign Line Numbers for Project Item Sequence Number

Contract Requirements:
The contract requirements item was established to capture potential project incentive/bonus payments. This item should **ONLY** be used when there are monetary incentives/bonuses. This amount will be reflected on the fund distribution sheet for budget purposes.

The Contract Requirements amount will be reflected on the Fund Distribution Sheet.

ITEM	DESCRIPTION	UNITS	SPEC YEAR	SPECIFICATIONS
25585	CONTRACT REQUIREMENTS	TEC	08 Metric	CONT. REQ.
25585	CONTRACT REQUIREMENTS	TEC	07 Imperial	CONT. REQ.

TRNS*PORT Instructions:

1. Set Item Code Table to 08 (Metric) or 07 (Imperial)
2. Create a category titled "Contract Requirements" for non-bid items with a category number 3002 (See PES Manual Chapter 6)
3. For this category set Construction Engineering percentage to (0) zero
4. For this category set Contingency percentage to (0) zero
5. Add funds to category (See PES Manual chapter 7)
6. Add standard item number 25585 Contract Requirements (See PES Manual chapter 8)
7. Insert the Total Estimated Cost (TEC) in the Estimated Unit Price field
8. Enter (1) in Estimate Quantity field
9. Select "Y" for Non-Bid Item
10. Select "E" for Source of Price
11. Select "Y" for Estimated Price Lock
12. Assign Line Numbers for Project Item Sequence Number

Category Length (Mi/K): Enter the length of the project in miles (kilometers) represented by the category. Enter length in first category only and leave all others blank, or split the length between categories.

The length of the entire "combined project" is totaled from this field, therefore it is important that the various designers enter the correct length in their categories:

L&D designers will input length of project, excluding length of bridges on mainline.

Bridge designers will input length of bridges that are on the **mainline**. (Lengths of bridges crossing the mainline should not be entered.) In the case of twin bridges, the length should be entered for only one of the bridges.

All other designers will leave this field blank (unless there is no L&D project to which the project will be associated; in that case, follow instructions for L&D designers).

Category Width (Ft/M): Enter the width of the project represented by this category.

Asset Type: Select appropriate asset type for maintenance-funded projects from drop-down menu.

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The next five fields are for bridges/structures only. Do not enter information in these fields unless your project is a bridge project. Trns.port uses the **Bridge Plan Number** field to determine whether the category represents a structure or not.

Bridge Plan Number: Enter the Plan No. If the project is a widening, in addition to the Plan No., enter the four-digit VA Structure Number of the existing bridge.

EXAMPLE: 272-04; Str #1801

Note: If you enter information in this field, it is vital that the next four fields be filled-out. Failure to complete all five fields results in errors in the Site Manager program.

Bridge Length (Ft/M): Enter the length from BEGINNING OF BRIDGE to END OF BRIDGE. This should match the length given on front sheet of the plans. This field may be left at the default value of 0.00 if not applicable.

Bridge Width (Ft/M): Enter out-to-out width of bridge. This should match the overall width shown on front sheet of the plans. This field may be left at the default value of 0.00 if not applicable.

Number of Spans: Enter the number of spans of the structure.

Bridge Type: Select the type of basic principal supporting members of the bridge from the drop-down menu.

Click on the radio button for page 2 of the category.

Contingency Pct: The only exception to this is if the category is **Lump sum CEI, Lump sum Contingency or Contract Requirements – enter 0.00**.

Lump Sum Contingency: Contingency on construction and maintenance contracts is used to capture the potential cost of additional work, unforeseen conditions such as differing site conditions, plan changes etc.   The following items need to be accounted for in your contingency budget for both construction and maintenance contracts including schedule work:

- Fuel Adjustment
- Asphalt Price Adjustment
- Steel Adjustment
- Ride ability

The District Construction or District Maintenance Engineer will provide this cost to the Project Manager. If there is more than one federal project number, the contingency cost should be allocated to each federal project. The cost may be divided among other PCN's, if the Project Manager desires.

This lump sum CE amount will be reflected on the Fund Distribution Sheet.

ITEM	DESCRIPTION	UNITS	SPEC YEAR	SPECIFICATIONS
25590	CONTINGENCY	TEC	08 Metric	CONTING.
25590	CONTINGENCY	TEC	07 Imperial	CONTING.

TRNS*PORT Instructions:

1. Set Item Code Table to 08 (Metric) or 07 (Imperial)
2. Set the Contingency percentage for each category to (0) zero
3. Create a category titled "Contingency" for non-bid items with a category number 3003 (See PES Manual Chapter 6)
4. For this category set Contingency percentage to (0) zero
5. Add funds to category (See PES Manual chapter 7)
6. Add standard item number 25590 Contingency (See PES Manual chapter 8)
7. Insert the Total Estimated Cost (TEC) in the Estimated Unit Price field
8. Enter (1) in Estimate Quantity field
9. Select "Y" for Non-Bid Item
10. Select "E" for Source of Price
11. Select "Y" for Estimated Price Lock
12. Assign Line Numbers for Project Item Sequence Number

Federal Structure ID: Enter the 5-digit HTRIS Structure ID.   This is a unique 5-digit number assigned to the structure and may be found on the first screen of the structure inventory in the HTRIS system. (This is not to be confused with the 4-digit Structure Number assigned by the State of Virginia.) Enter the Structure ID in the first 5 spaces of this field, leaving the remainder of the field blank. (Enter leading zeroes if necessary to fill 5 spaces.)

The District Safety Inspection personnel in the Districts shall be contacted for the Structure ID.

Maint. Act.:   This field is for maintenance-funded projects only. Enter 72000. Leave this field blank if the project is not a maintenance-funded project.

When both pages of the category have been completed, you can click on the ADD MORE button to enter information for another category. Click on the OK button when you have finished.

o   If you have completed all required field criteria satisfactorily, the category(ies) will be added.

o   If a required field was not filled-in or incorrect data entered at a field which is supported with a reference table, a **Warning** or **Error** window will display giving information as to what field was left blank or contains an invalid value:
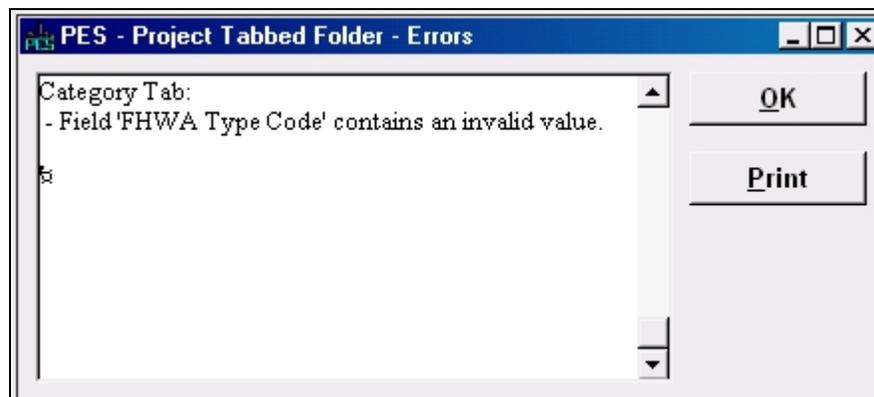
Click on the SAVE icon to enter the category(ies) into the Trns·port database.

6.2 Changing a Category

To change information in a category, first locate the project in the Project List. 📋
Right-click on the project, and select **Tabbed Folder Change**. Click on the Categories tab.   In the
list of categories, select the category you wish to change.   Trns·port displays the Category detail
window in the detail area of the screen.

You can change any of the fields or add information to the blank fields. When you finish making
your changes, click on the OK button.   Click on the SAVE icon 💾 to enter the changes into the
Trns·port database.

6.3 Copying a Category

To copy a category, first locate the project in the Project List. 📋   Right-click on the project and
select **Tabbed Folder Change**. Trns·port displays the tabbed folder. Click on the Categories tab. In
the list of categories, right-click on the category you wish to copy and select **Copy Special**. Trns·port
displays a **Copy Category** window.
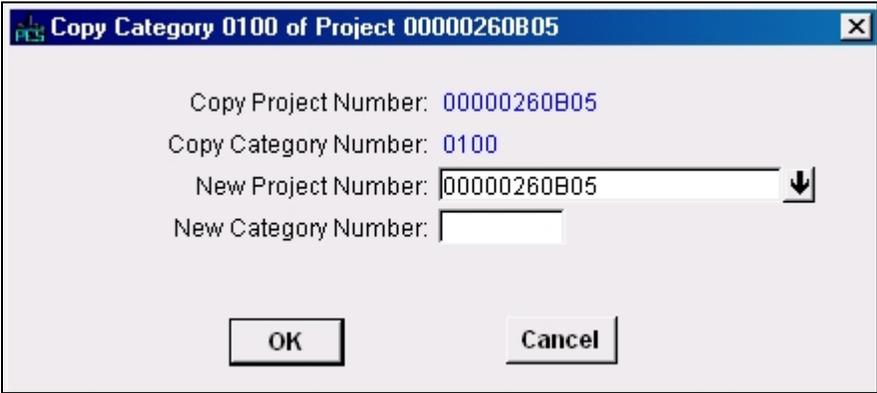
The category may be copied into any existing project in your control group. At the **New Project
Number** field, you may use the drop-down arrow to locate the project you wish to copy to, or type it
in the block. At the **New Category Number** field, enter the category number of the new category.
Be sure to follow the format for numbering categories. Click on the OK button. Click on the SAVE
icon 💾 to enter the changes into the Trns·port database.

6.4 Deleting a Category

When a category is deleted, all funds and items that have been created for that category are also deleted.

To delete a category, first locate the project in the Project List. ▣
Right-click on the project and select **Tabbed Folder Change**. Trns·port displays the tabbed folder window.
Click on the Categories tab. In the list of categories, select the category you wish to delete, right-click and select **Delete**. A **Delete Rows** window will display.
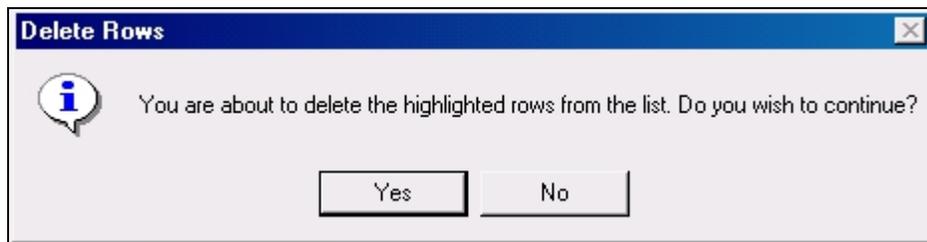
Click YES to confirm the deletion. Another **Delete Rows** window displays, warning that all funds and items associated with the category will be deleted. Click YES to confirm the deletion.

Click on the SAVE icon ▣ to enter the changes into the Trns·port database.