Chapter 10 – Reports

Contents

Users can generate default system and DOT&PF custom reports. These reports can be generated through Global Reports or from reports associated with a specific component and listed in the component action menu. Most reports are role specific and users will generate them from the component action menu. The grid below lists the custom Preconstruction reports and a short description of the report (*Figure 10.1*). The grid on the next page shows each custom Preconstruction report in AASHTOWare Project (AWP) and which role can generate it (*Figure 10.2*).

AWP Area	Report Name	Report Description
Project	Project Engineer's Estimate	Project level engineer's estimate. This report will use the CENG% from Design unless a CENG% from Construction is entered.
	Project Engineer's Estimate-XLS	Project engineer's estimate in XLS format.
	Estimate of Quantities-CAD	XLS export of project items for import to CAD for C - 1 plan sheets.
	Project Validation	Project Level validations not performed by the system project validation.
Proposal	Proposal Engineer's Estimate-Summary	Proposal level engineer's estimate. This report will use the CENG% from Design unless a CENG% from Construction is entered.
	Proposal Engineer's Estimate-Detail	Proposal level engineer's estimate. This report will use the CENG% from Design unless a CENG% from Construction is entered. Includes information at the Project/Category level.
	Proposal Engineer's Estimate-XLS	Proposal level engineer's estimate detail in XLS format.
	Proposal Validation	Proposal level validations not performed by the system proposal validation.
	DBE Goal Set	List of all proposal items and work categories designated as DBE items with min. 3 DBEs certified in selected work categories for the region.
	OJT Goal Set	List of all non-OJT items on a proposal. Used to create OJT Goal.
	Preliminary Project Agreement Estimate	Funding estimate based on the engineer's estimate for a proposal.
	Final Project Agreement Estimate	Funding estimate based on the low bid for a proposal.
	Bid Forms	Report used in advertising a proposal. Matches the AWP Bids file format.
	Addendum/Notice to Bidders Cover Page	Cover page for Addenda and Notices to Bidders.
	Addendum/Notice to Bidders Detail	List of tracked changes to a Proposal when in Advertising workflow phase.
	Bid Tab Analysis	Package of reports necessary for analysis of bids: Low Bid Summary, Bid Tabulation, Bidder Variance, Vendor Ranking.
	Bid Tabulation-XLS	Tabulation of all bids and the engineer's estimate in XLS format.
	Bidder Variance-XLS	XLS format report showing item level bid analysis.
	Contract Status Summary	Summary level report of all contracts and their procurement methods, can be selected for all regions or individual region for a date range.
	Contract Status Detail	Detail level report of all contracts and their procurement methods, can be selected for all regions or individual region for a date range.
	Contract Status-XLS	Summary and detail level report of all contracts and their procurement methods, can be selected for all regions or individual region for a date range, in XLS format.

Figure 10.1

	Constr Contracts Award Info - Date Range	Report showing contract award information for a date range for one region or all regions.
	Constr Contracts Award Info - Date Range - XLS	Report showing contract award information for a date range for one region or all regions, in XLS format
	Constr Contracts Bid Opening - Date Range	Similar to Contr Contracts Award Info report, but also includes info for proposals that have had bid openings, but have not been awarded.
	Bidder Preferences Calculation	Calculation of Bidder's Preferences Amounts for vendors to assist entry of preferences on state-funded projects.
	Plan Holders List	A record of all vendors who registered on a proposal's plan holders list.
	Proposal Pre-Award Estimate for Project Control	Concise project amount information based on the Certified Low Bid, ICAP, and CENG %.
General	Item Usage	Item level report that shows the projects on which an item has been used. Primarily for Module Administrators.
	Item List - XLS	Excel spreadsheet of Item lists.
	Final Project Item Funding Breakout - XLS	XLS format report showing final project item funding information.
Reference Vendor	BidX_Vendupd_DQ	Text file of all vendors with a Bidder ID to be uploaded to Bid Express.

Figure 10.1 (cont.)

AWP Area	Report Name	Component	Project User	Funding User	Proposal User	Letting User	RCCL User	Consultant User	Module Admin	Precon Vendor Admin	Constr View Only User
Project	Project Engineer's Estimate	Project Summary	x	x	x	x		x	x		
	Project Engineer's Estimate-XLS	Project Summary	x	x	x	x		x	x		
	Estimate of Quantities-CAD	Project Summary	x					x	x		
	Project Validation	Project Summary		x	x	x		x	x		
Proposal	Proposal Engineer's Estimate - Detail	Proposal Summary			x	x			x		
	Proposal Engineer's Estimate - Summary	Proposal Summary			x	x			x		
	Proposal Engineer's Estimate - XLS	Proposal Summary			x	x	x		x		
	Proposal Validation	Proposal Summary			x	x			x		
	DBE Goal Set	Proposal Summary					x		x		
	OJT Goal Set	Proposal Summary					x		x		
	Preliminary Project Agreement Estimate	Proposal Summary		x		x			x		
	Final Project Agreement Estimate	Proposal Summary		x	x	x			x		
	Bid Forms	Proposal Summary			x	x			x		
	Addendum/Notice to Bidders Cover Page	Proposal Summary				x			x		
	Addendum/Notice to Bidders Detail	Proposal Summary			x	x			x		
	Bid Tab Analysis	Proposal Summary			x	x			x		
	Bid Tabulation-XLS	Proposal Summary			x	x			x		
	Bidder Variance - XLS	Proposal Summary			x	x			x		
	Contract Status - XLS	Proposal Summary			x	x			x		
	Contract Status Detail	Proposal Summary			x	x			x		
	Contract Status Summary	Proposal Summary			x	x			x		
	Constr Contracts Award Info - Date Range	Proposal Summary			x	x			x		
	Constr Contracts Award Info - Date Range - XLS	Proposal Summary			x	x			x		

Figure 10.2

Constr Contracts Bid Opening - Date Range	Proposal Summary								
Plan Holders List	Proposal Summary			x					
Proposal Pre-Award Estimate for Project Control	Proposal Summary	x	x	x					
Bidder Preferences Calculation	Proposal Vendor			x	x		x		
BidX_Vendupd_DQ	Vendor General Summary						x	x	
Reference Vendor									
Item Usage	Item General	x	x	x		x	x		
Item List - XLS	Item General	x				x	x		
Final Project Item Funding Breakout - XLS	Proposal Summary								x

Figure 10.2 (cont.)

When generating reports, the system has five (5) pages that may or may not require input from users when generating reports:

1. Select Report
2. Select Data
3. Set Parameters
4. Output Options
5. Schedule report

When generating report from Global Actions menu, you will have to always take actions in at least the first three (3) pages. When generating reports from a component, the report and data are usually already selected since you select the report name and the component often provides the data.

10.2 Generating Reports – Global Actions Menu

To generate reports from Global Reports:

1. From any menu, (A) expand the **Global Actions menu** (*Figure 10.3*).
2. (B) Select **Generate Report**.
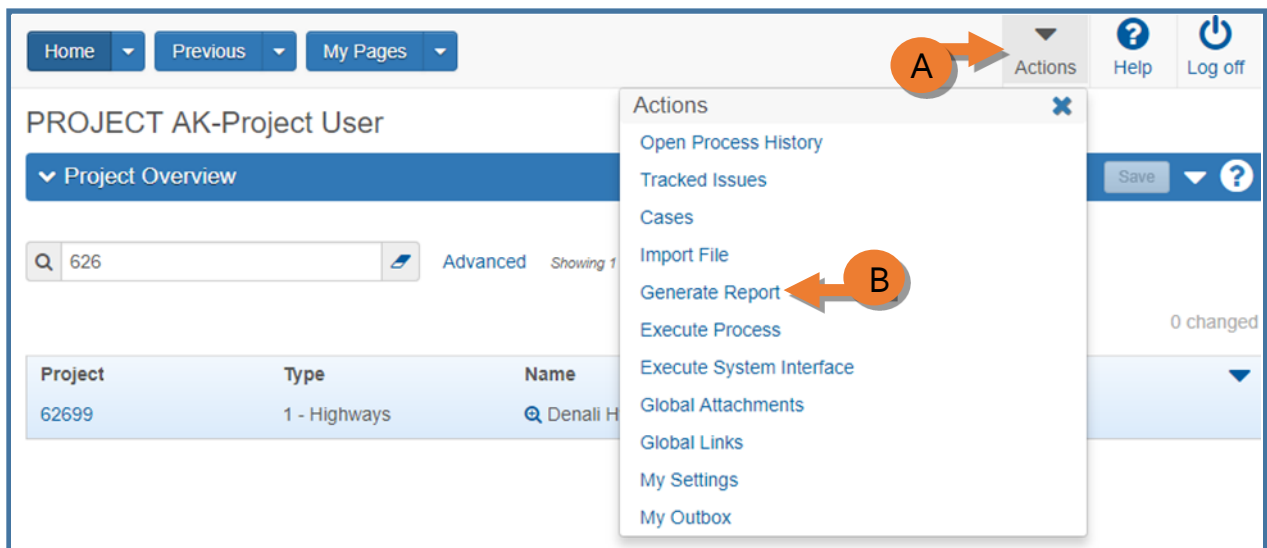
Figure 10.3

3. On Generate Report Select Report - Page 1 of 5 (*Figure 10.4*):
   a. (C) Search for the report you want to generate.
   b. (D) Select the report. The selected report will have a green checkmark next to it.
   c. (E) Click the **Next** arrow to go to page two (2).
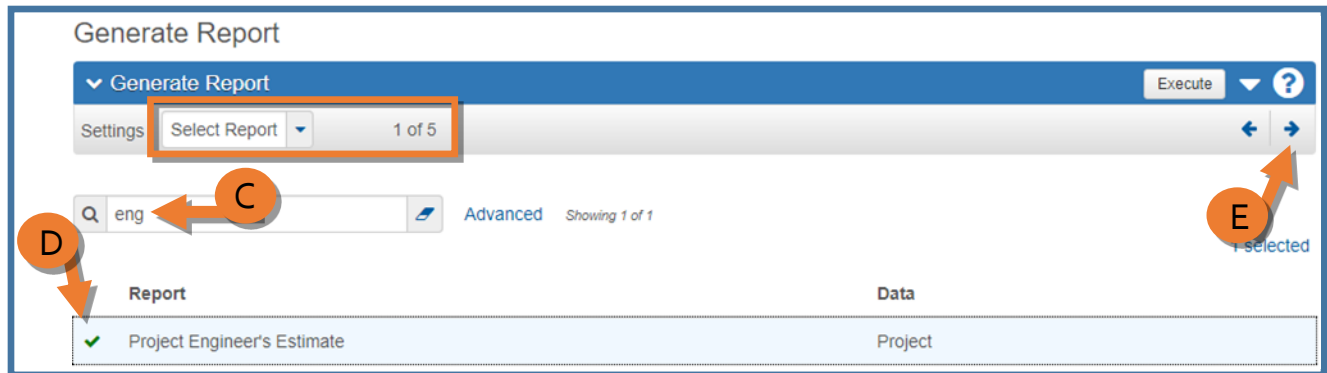
Figure 10.4
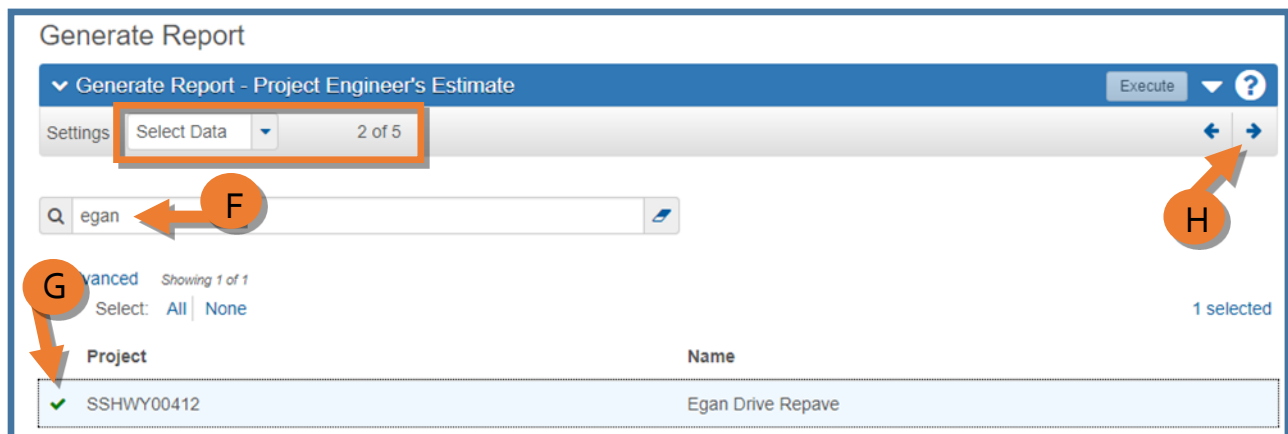
4. On Generate Report Select Data - page 2 of 5 (*Figure 10.5*):
   a. (F) Search for the data for the report you want to run. NOTE: The type of data will vary depending on the report being run.
   b. (G) Select the data to be used for the report. The selected data will have a green checkmark next to it.
   c. (H) Click the **Next** arrow to go to page three (3).

Figure 10.5

5. On Generate Report Set Parameters - page 3 of 5 (*Figure 10.6*):
    a. (I) Set the parameters for the report. The parameters will vary depending on what report you are running. Packages of reports like the Bid Tab Analysis report will allow you to deselect reports if you don't want to run them. Some reports require a description entered as shown below or a date range to be selected.
    b. (J) Click **<Execute>** on this page to immediately generate a PDF version of the report and skip the last two (2) pages, or click the **Next** arrow to go to page four (4).

Figure 10.6

6. On Generate Report Output Options - page 4 of 5 (*Figure 10.7*):

    Output Type – Select "Generate as PDF", this is the default selection.
    Report Layout Source – Select "Custom", this is the default selection.
    a. (J) Click **<Execute>** to generate the report or click the **Next** arrow to go to page five (5). NOTE: if the Generate Available Data Output checkbox is checked, a report containing all the entities, child entities, data types, and data values used to create the base report will be generated. This report format is normally generated by system administrators.

Figure 10.7

7. On Generate Report Schedule Report - page 5 of 5 (*Figure 10.8*):
   a. Alaska DOT&PF does not use the report scheduling functionality of AWP.
   b. (K) Click **<Execute>**.

Figure 10.8

10.3 Generating Reports – Component Actions Menu

Reports can also be generated from component action menus, most often from the Project Summary component or the Proposal Summary component.

To generate from a component:

1. (A) Expand the component action menu (*Figure 10.9*).
2. (B) Select the report you want to generate. Remember, the reports you see in the action menu are determined by the role you are in.
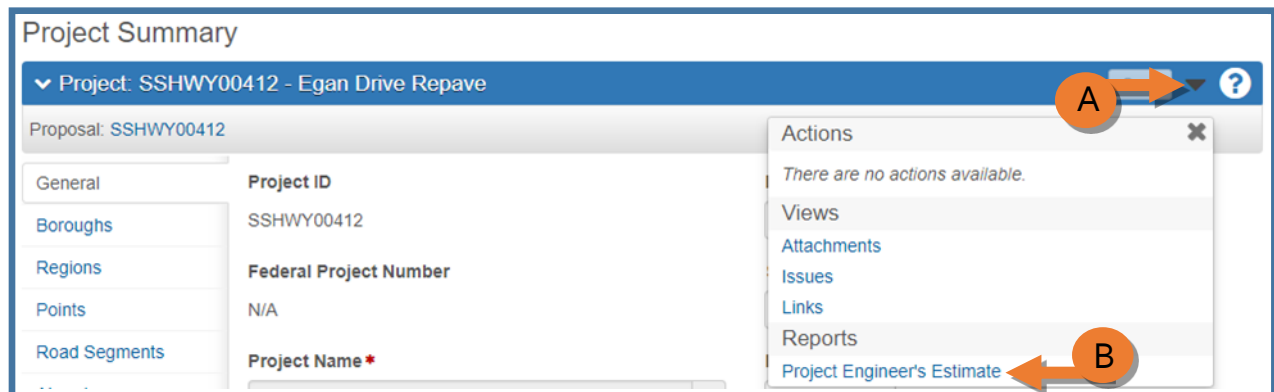

Figure 10.9

3. If a Set Parameters page appears, (C) set the parameters you want for your report (*Figure 10.10*).
   NOTE: Most reports generated from the component will not require you to set parameters. If this is the case, just click <Execute>.
4. (D) Click **<Execute>**.

Generate Report

Generate Report - Project Engineer's Estimate   Execute

Settings   Set Parameters   3 of 5

D

Estimate Description *
Enter the estimate description here (Plans In Hand, Review, Certification, Final, etc.)

Plans in Hand

Show Engineer's Estimate *
Generate the engineer's estimate report for project.

☑

Show Cost Estimate Funding Summary - By Fund & Category *
Generate cost estimate funding summary for project grouped by fund then category.

☐

C

Figure 10.10