1.1 PSA – Populating Project Info

Background:

After the Tentative Advertising Website is populated RFP information the remaining Project level information must be populated to move to the next step.

Roles:

PSA User

Navigation:

Dashboard > Project Overview > Project

1. From the Project Summary enter the **Description of Work.** This information will populate to the Proposal and follow this contract to construction. The Description of Work will also populate to the PSA Calendar. This information can be edited up until award, but it must be correct on the Project and Proposal prior to award and transition to construction.
2. In the financial collapsible populate the **ICAP%**.
3. Scroll down to the PSA collapsible and enter or update any information that was not populated previously (i.e. **ASPS Date**, **Term Agreement**, **Waiver** and **Procurement Officer**).
4. Click **Save**.
5. If the PSA work will occur in a defined Borough (or Boroughs) select the **Boroughs** tab and press **New**. Press enter in the **Borough ID** field (or begin typing borough name) and select the correct borough. Enter the approximate **Percentage** of work occurring in the borough and check the **Primary** box, if appropriate. Repeat this process for as many

Boroughs as need to be entered. Click **Save** If the borough this work will occur in is undefined skip to the next step.
6. The primary region should be populated when advertising the RFP, but in order to populate additional regions select the Regions tab and press **New**. In the **Region ID** field press enter and select the correct region. Repeat as many times as applicable. Click **Save**. The primary region should be the region from which the work is advertised.
7. If applicable select the **Airports** tab, press **New**, begin entering the **Airport ID** and select the correct airport. Repeat as many times as necessary and click **Save**.
8. At the top of the page select the **Categories and Items** quick link and click the **Categories** tab. Press **New** and toggle the **Category ID** to *00BB – Basic Bid* and click **Save**.
9. Select the **Items** tab and click the **New** button.
10. Enter an **Item ID** (click enter in the field to see the choices or begin typing to use the autocomplete) and select it.
    a. If this is a term agreement select the PSA.000.0000 – PSA Term Agreement
11. Populate the **Bid Scheduled Supplemental Description** (this is the description the contractors will see when submitting their proposal).
12. Enter a **Quantity** of 1, a **Project Unit Price** of 1, Toggle the **Bid Requirement Code** to *Fixed* (this will stop the contractor from having to bid on this item) toggle the **Category ID** to **00-BB – Basic Bid** and press **Save**.

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13. At the top of the page click the **Fund Package Overview** quick link. Click the **Select Fund Packages** button and search for and select the fund package **PSA – Professional Services Agreement** and click the **Add Fund Package** button.
14. At the top of the page click the **Funding: Assign to Items** quick link, select the radio button **A** and click **Save**.

Next Steps:

Now it's time to create the Proposal: Use the QRG: *2.0 PSA – Creating a Proposal*