

# User's Manual

State Public Works Board Agenda Items



Specialized Systems Development  
Department of Finance

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## 1. Introduction

### 1.1 Purpose

This document is a user's manual for the State Public Works Board Agenda Items (SPWBAI) application. It is intended to be used by state agency staff to submit an Agenda Item to the Department of Finance's (Finance) Capital Outlay unit. This document is designed to be relevant to Consent Agenda Items.

### 1.2 Scope

The SPWBAI application standardizes and automates the Agenda Item submission process. This system allows any user to create an Agenda Item. The user is then able to submit the created Agenda Item via email to the assigned Finance Capital Outlay analyst.

### 1.3 Phase I Limitation

At this time, the SPWBAI application is limited to projects which have at least one source of funding in the 2016 Budget Act. For all other projects, use the application to get your Agenda Item started to ensure the formatting and the standardized verbiage and sections are correct. Your use of the application will result in an Agenda Item that you can manipulate to add the correct project name and authority.

## 2. Accessing the Application

### 2.1 First-Time Users

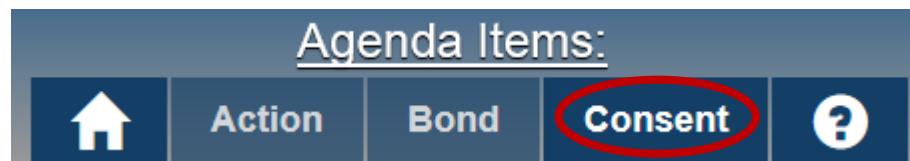
This Internet application resides on the State Public Works Board website ([www.spwb.ca.gov](http://www.spwb.ca.gov)) under "Featured Links."

## 3. Step-By-Step Instructions for Using the Application

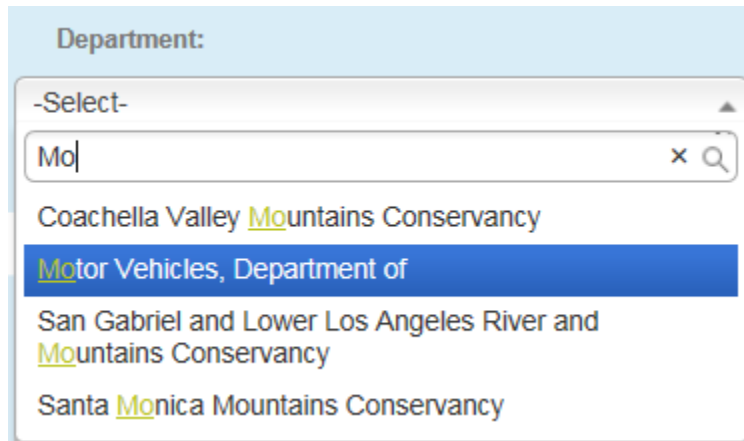
### 3A. Actor: State Agency User

#### 3.1 User Creates a Consent Item

- 3.1.1 User accesses the SPWBAI application and is on the home page.
- 3.1.2 Select "Consent" at the top of the application menu.



- 3.1.3 Select the Department from the drop-down list by either scrolling or typing the name in the search box.



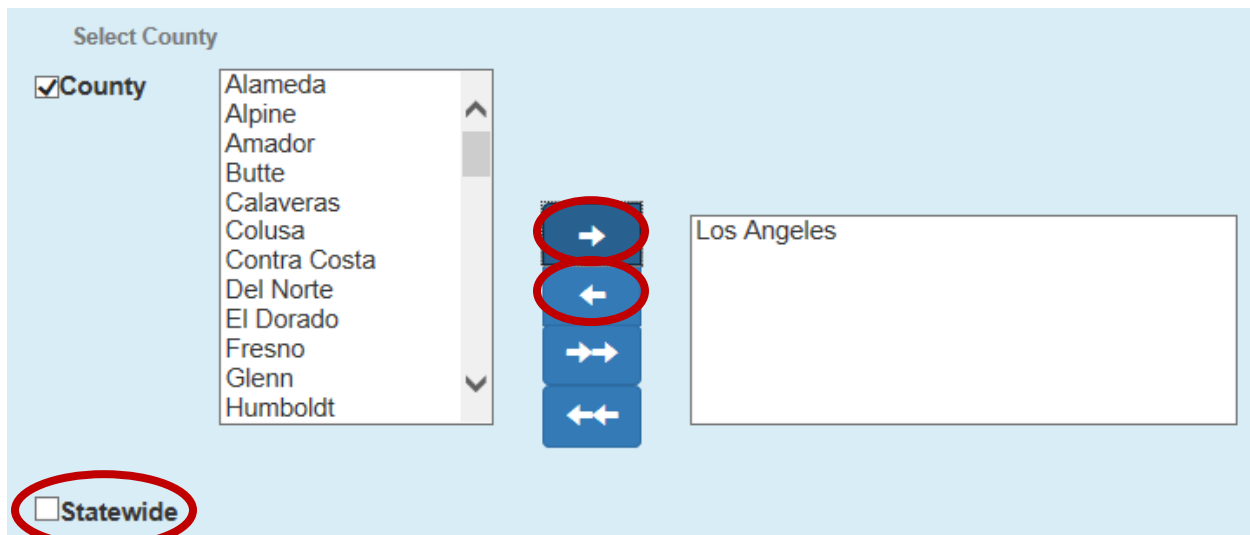
- 3.1.4 Application will display the Department name.

- 3.1.5 Select the project from the drop-down list.

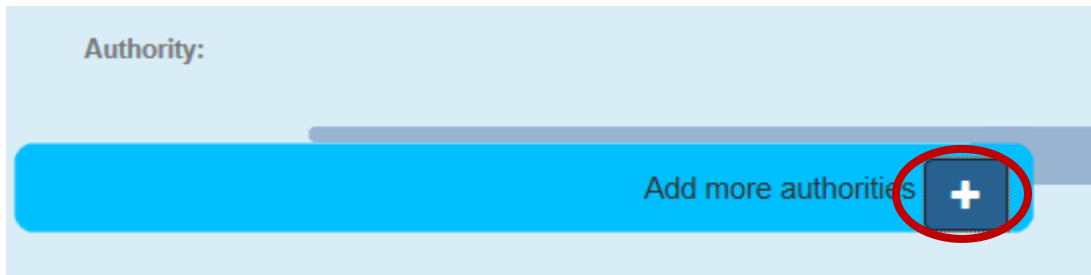


- 3.1.6 Application will display the project name and Authority.

- 3.1.7 Select one or more counties or the statewide option. To add counties, select one or more counties from the scroll list on the left and click the single right arrow button. To remove counties, select one or more counties from the box on the right and click the single left arrow button. The double arrow buttons add and remove all counties.



3.1.8 To include additional Authorities, click the “+” button.



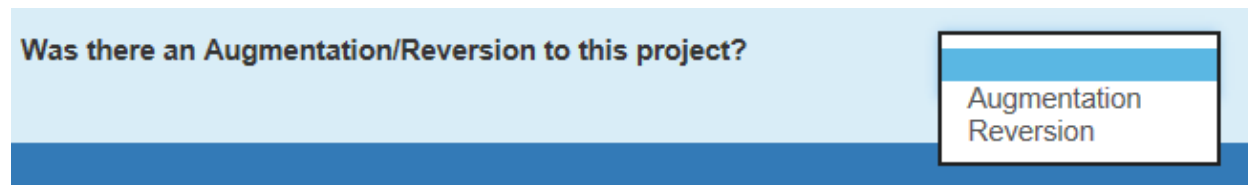
3.1.9 Application will display a pop-up dialog box.

3.1.10 Complete the information and click “Add.”



3.1.11 Application will display the additional Authority.

3.1.12 Select whether this project contains an augmentation or reversion. If neither apply, leave blank.



3.1.13 If augmentation or reversion was selected, application will display information fields requesting the Executive Order number and the augmentation/reversion amount.

3.1.14 Select the Executive Order number from the drop-down list and enter the dollar amount of the augmentation/reversion. To add additional Executive Order numbers and corresponding dollar amounts, click the “+” button.

3.1.15 Application will either increase (augmentation) or decrease (reversion) the “Total authorized project cost.”

3.1.16 Select whether there is a reversion from the Budget Act.

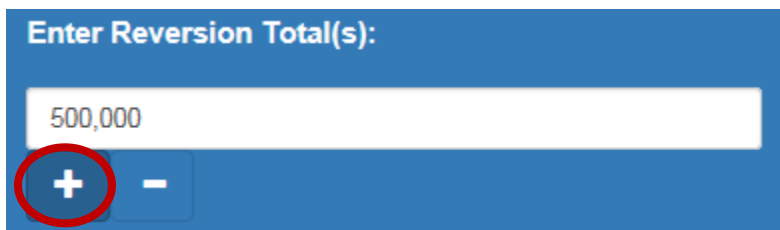
3.1.17 If “Yes” is selected, application will display information fields requesting the Budget Act reversion item number and corresponding dollar amount.

3.1.18 Complete the fields and click “Add reversion.”

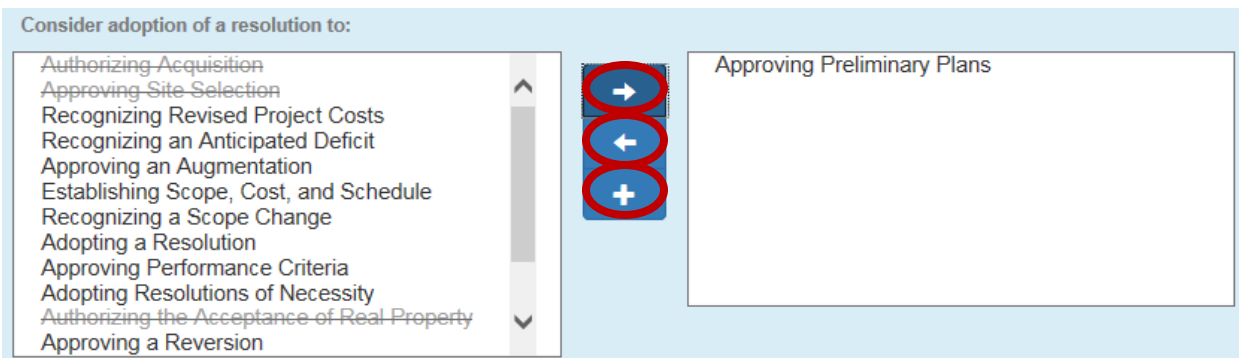
3.1.19 Application will display the Budget Act and reversion Item number in the Authority section and reduce the “Total authorized project cost” by the amount of the reversion.

3.1.20 Select whether there is a reversion on the natural for this project.

- 3.1.21 If “Yes” is selected, application will display a field requesting the reversion dollar amount. Enter the amount. To include additional reversion amounts, click the “+” button.



- 3.1.22 Application will reduce the amount of the “Total authorized project cost” by the amount of the reversion.
- 3.1.23 Select one or more Consider options. To add selections, click one or more Consider options in the left scroll box and click the right arrow button. To remove selections after being added, select one or more Consider options in the right box and click the left arrow button. Once a selection has been added to the box on the right, the incompatible selections on the left will be designated with strikethrough.



- 3.1.24 Application will display the Consider option(s) in the Action Requested and Staff Recommendation sections.
- 3.1.25 To add an option not listed, click the “+” button.

3.1.26 Application will display a pop-up dialog box to add "Other."

Enter value for OTHER:



3.1.27 Enter free-flow text into the text field and click "Add." Otherwise, click "Cancel."

3.1.28 Application will display the custom "Other" Consider option in the Action Requested and Staff Recommendation sections.

3.1.29 Select whether the project is within scope and provide the scope description in the text box.

**Scope Description**

Is this project within scope?

Select  
Yes  
No



- 3.1.30 Select whether the project is within cost and provide the cost explanation in the text box.

- 3.1.31 Select whether there will be any Local costs.

- 3.1.32 If there are Local costs, then the application will display State and Local costs. Otherwise, the application will display only project costs.

- 3.1.33 Complete the cost fields as well as the cost breakdowns.

- 3.1.34 If the “Total estimated project cost” is less than the “Total authorized project cost,” then the application will state that there is a project savings and will prompt the user if they want to enter amounts for a reversion and/or to recognize revised project costs.

- 3.1.35 If the "Total estimated project cost" is less than the "Total authorized project cost," then the application will state that there is a project deficit and will prompt the user if they want to enter amounts for an augmentation and/or to recognize revised project costs.

There seems to be a project deficit. Did you want to enter amounts for an augmentation and/or recognize the revised project costs?

Select  
Yes  
No

Requested augmentation: \$

Recognize revised project costs: \$ 1,000

- 3.1.36 Select the CEQA Type and the corresponding information depending on the option selected.

**CEQA Type**

Determination  
Exemption  
OTHER

- 3.1.37 Depending on the Consider option(s) selected, the application will display either the Real Estate Due Diligence or the Condition of Property sections.
- 3.1.38 If the Real Estate Due Diligence section is displayed, select whether the Summary of Conditions letter has been completed and the corresponding information depending on the option selected.

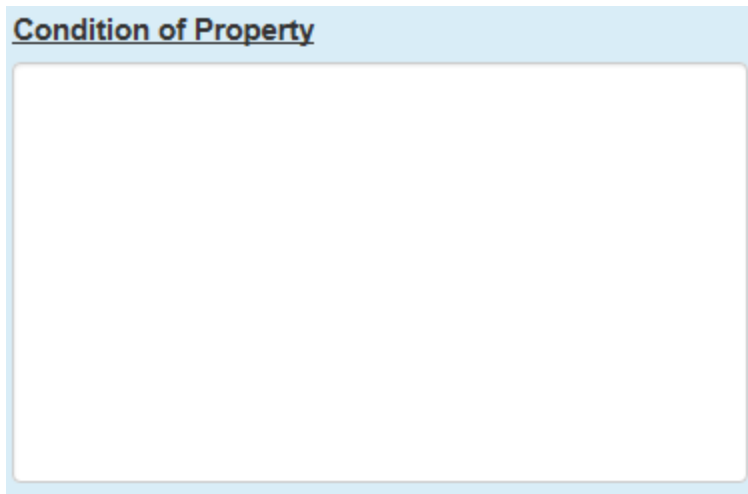
**Real Estate Due Diligence**

Has the Summary of Conditions letter been completed?

Yes, without issues  
Yes, with issues  
No

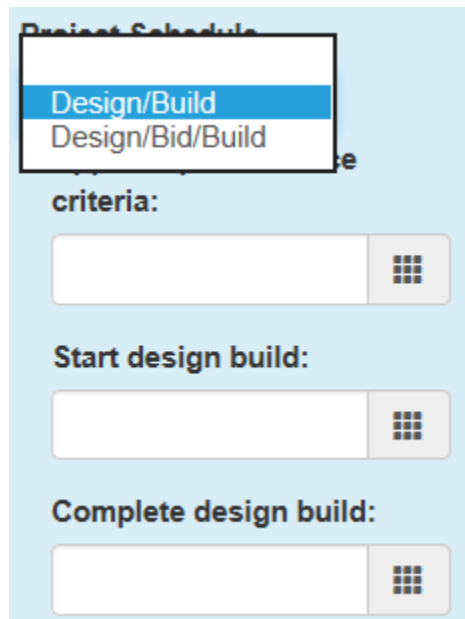
**Explain:**

- 3.1.39 If the Condition of Property section is displayed, provide a description of the condition of the property.



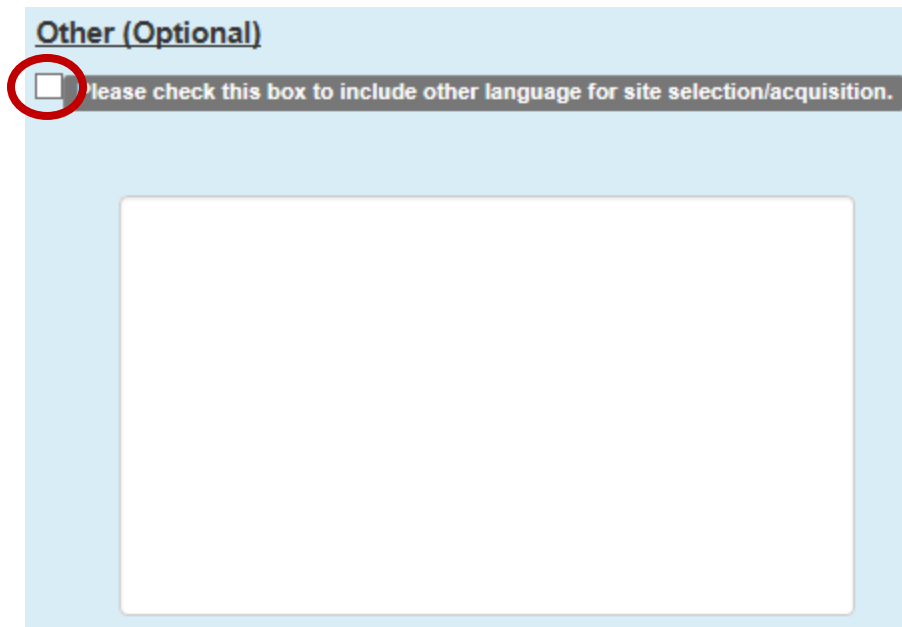
The screenshot shows a light blue header with the text "Condition of Property" in a bold, dark font. Below the header is a large, empty white rectangular box with a thin grey border, intended for a user to enter a description of the property's condition.

- 3.1.40 Select the type of project schedule and complete the corresponding information (the types of project schedules provided in the drop-down list vary depending on the Consider option selected).



The screenshot displays the "Project Schedule" section. At the top, a dropdown menu is open, showing two options: "Design/Build" (highlighted in blue) and "Design/Bid/Build". Below the dropdown, the text "criteria:" is followed by a text input field with a grid icon on the right. Further down, the text "Start design build:" is followed by another text input field with a grid icon. At the bottom, the text "Complete design build:" is followed by a third text input field with a grid icon.

- 3.1.41 Complete the Other section if it applies. Clicking the check box will automatically populate the “Other” language for a site selection/acquisition. User may include additional language if necessary.



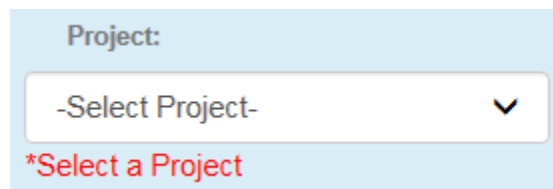
**Other (Optional)**

Please check this box to include other language for site selection/acquisition.

- 3.1.42 Click “Create.”



- 3.1.43 If a required field has not been completed, the application will display an error message next to the required field (see [Section 4](#) for additional information regarding error handling).




Project:

-Select Project-

\*Select a Project

- 3.1.44 Once all corrections have been made and all required fields populated, click “Create.”
- 3.1.45 Application will display a pop-up dialog box confirming the successful creation of the Agenda Item.

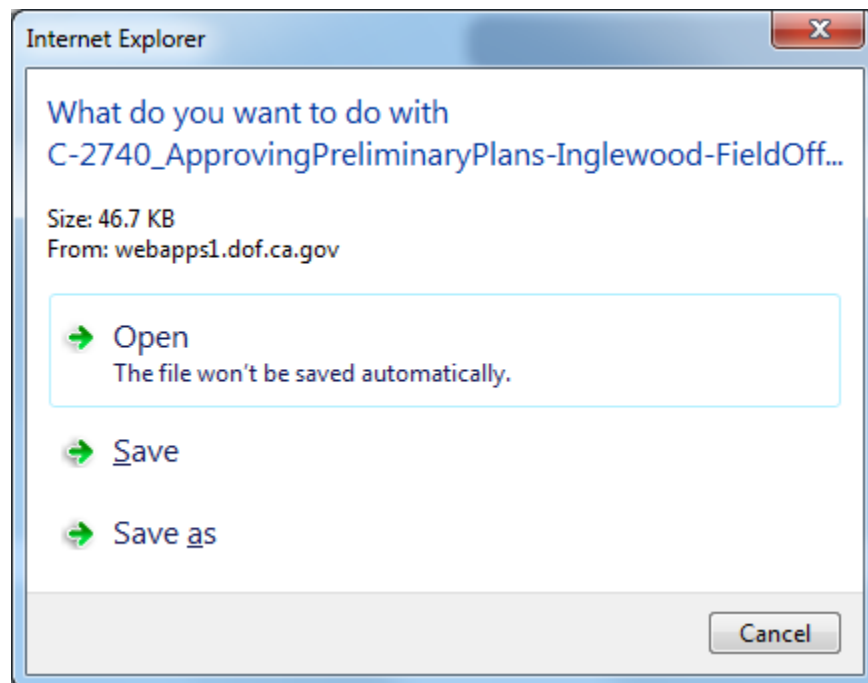
## 3.1.46 Click "Get File."

A green notification bar with the text "Success!" on the left and a close button (X) on the right.

By clicking on the "Get File" button below, you will save the completed Word Document on your computer. Please open it and verify that all entries are correct. When done, please submit it to your Capital Outlay Finance Budget Analyst with any necessary back-up information including the following: CFSS, DF-14D, 3-Page Estimate, Form 22/220, etc.



## 3.1.47 System will display a pop-up asking the user what to do with the file.



## 3.1.48 The application has provided a default file name. If you would like to change the name of the file, click "Save as." To open the file, click "Open."

3.1.49 System will display the Microsoft Word document.

## CONSENT ITEM

### CONSENT ITEM

DEPARTMENT OF MOTOR VEHICLES (2740)  
INGLEWOOD FIELD OFFICE REPLACEMENT  
LOS ANGELES COUNTY

*Authority:* Chapter 10, Statutes of 2015, Item 2740-301-0044(3)  
Chapter 23, Statutes of 2016, Item 2740-301-0044(3)

**Consider approving preliminary plans**

## CONSENT ITEMS

### STAFF ANALYSIS

Department of Motor Vehicles  
Inglewood Field Office Replacement  
Los Angeles County

#### Action Requested

**If approved, the requested action will approve preliminary plans.**

#### Scope Description

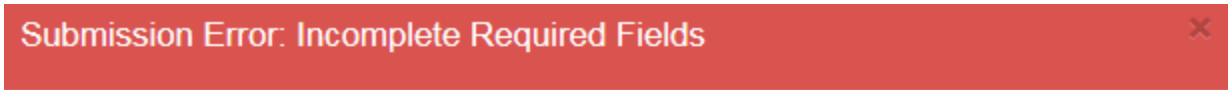
**This project is within scope.** This project consists of the demolition of an existing DMV field office in Inglewood, CA and construction of a new 15,644 square foot (sf), single-story field office on the existing site. The project also includes site work, utilities, walkways, curbs, gutters, signage, landscaping, irrigation, fencing, gates, trash enclosure, site drainage, site lighting, surface parking, attached drive-test canopy, communications, photovoltaic rooftop system and all associated requirements to complete the construction of the facility. The project shall be designed to LEED Silver and will also be a Zero Net Energy (ZNE) pilot project

3.1.50 Verify all of the information is correct including formatting, spacing, etc. After all changes have been made, save the document, and email the Agenda Item to your Capital Outlay Finance Budget Analyst with any necessary backup information including the following: CFSS, DF-14D, 3-page Estimate, Form 22/220, etc.

## 4. Error Handling

### 4.1 Submission Error: Incomplete Required Fields

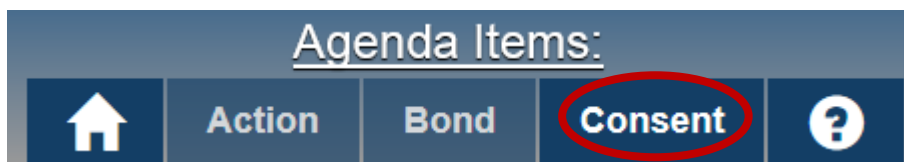
- 4.1.1 If any required fields are incomplete, the application will display a submission error after the user clicks “Create.”



There were errors in your request!

A red button with the word "Close" in white text, circled in blue.

- 4.1.2 Click “Close.”
- 4.1.3 The application’s error handling may have erased some previously completed fields. Review all fields and complete any missing information.
- 4.1.4 Click “Create” and proceed with creating the Item.
- 4.1.5 If the same error re-occurs, click the “Consent” tab at the top of the page to refresh the page and clear previously stored information. Then, recreate the Item.



- 4.1.6 If the same error persists or the application displays any other error, please contact Randy Katz (Randall.Katz@dof.ca.gov) within the Capital Outlay unit with a description of the error and relevant screenshots.