2.3 Proposal Validation

Background:

Proposals must be valid before they can be included in a Letting. Proposals have a validation process that generates a list of warnings about the state of the proposal. There are two validation processes that must be run: the system *Proposal Validation* and the *Proposal Validation* report – each validation checks different fields. Validations check for missing or incomplete information in the proposal and project, but cannot check for accurate entry. Some validation errors relate to fields that don't have information ready to enter yet (i.e. the CENG% from Construction amount). The validations are meant to catch fields that should be completed and are a reminder for information yet to enter.

Roles:

Proposal User, Letting User

Navigation:

Preconstruction > Proposal Overview > Proposal

1. From the Proposal Summary component, expand the component **Action Menu**.
2. Select **Validate Proposal**.
3. A **Proposal Validation Results** window will open in a new tab and will notify you whether this is a valid proposal or list warnings for missing or invalid data.

Note: Zero quantity Contingent Sum items will show up as warnings. These are okay, just make sure they are actually your zero quantity CS items. Each item will show up in two errors, the project item error, and the proposal item error. Fix any other validation errors.

4. Expand the Proposal Summary component **Action Menu**.
5. Under the Reports Section, select **Proposal Validation**.
6. On the Generate Report – Proposal Validation component, click **Execute**.
7. A new tab will open with the Proposal Validation Report and will list whether this proposal is valid, or warnings for missing or invalid data.
8. Correct any errors identified and validate the proposal again.

Next Steps:

Select DBE items on the Proposal. See QRG - *DBE Goal Item Selection*