Wizard Process Guides (July '06)

Questions: Contact Gerry Flood, the Volpe Center, USDOT, at 617-494-3848

Creating a Wizard Project	1) Open the Wizard software 2) Select **Projects>New** on the menu bar a) Alternative method: Click **New** icon under the menu bar 3) The **Create New Project** screen appears. Fill in the fields and click **Next**. There are seven steps to complete. Fields marked with ** are required (cannot advance to next step if the fields are not filled in). a) **Step 1 - Enter New Project Information** i) Project Title—enter a project title. ***This field is required.*** Note: You cannot have two Wizard projects that share the same title. ii) Project Number—enter a project number. This is the lead agency's unique identifier for the project. iii) Project Location—enter the project location. iv) Project Description—enter a brief project description. v) Lead Agency—Identify the lead agency for the project. ***This field is required.*** b) **Step 2 – Enter State Project Manager Information** i) Name—enter the state project manager's name. ***This field is required.*** ii) Mailing Address—enter the project manager's mailing address. iii) City/State/Zip—enter the City, State, and Zip Code for the project manager's address. Click the drop-down menu to choose a State. iv) Email Address—enter the project manager's email address. If an email address is entered, it must be valid (the character @ must appear in the address) to proceed to the next step. c) **Step 3 – Enter FHWA Area Engineer Information** i) Name—enter the name of the project's FHWA Area Engineer. ***This field is required.*** ii) Mailing Address—enter FWHA area engineer's mailing address. iii) City/State/Zip—enter the City, State, and Zip Code for the FHWA area engineer's address. Click the drop-down menu to choose a State. iv) Email Address—enter the area engineer's email address. If an email address is entered, it must be valid (the character @ must appear in the address) to proceed to the next step. d) **Step 4 – Enter FHWA Environmental Manager Information**

	i) Name—enter the FHWA Environmental Manager's name. ***This field is required.*** ii) Mailing Address—enter the environmental manager's mailing address. iii) City/State/Zip—enter the City, State, and Zip Code for the FHWA address. Click the drop-down menu to choose a State. iv) Email Address—enter the environmental manager's email address. If an email address is entered, it must be valid (the character @ must appear in the address) to proceed to the next step. e) **Step 5 – Select all Federal Requirements that May Impact Your Project** i) Select the Federal requirements that the EA or EIS (the project) might impact. After you create the project, the Wizard tracks these requirements along with your EA or EIS. ii) Click **Select All** to include all of the Federal requirements in the project. Use iii) **Clear All** to de-select all checked requirements. Note: Federal requirements can be added or removed from a project as needed on the **Project Requirements Panel**. f) **Step 6 – Select or Add Cooperating or Consulting Agencies** i) Select agencies that might serve as cooperating or consulting agencies to the project. You can later add or remove agencies on the **Overview** Tab. Note: You enter the names of agencies at this step; you designate an agency as "cooperating" or "consulting" on the **Overview** Tab. ii) If this is the first project being entered into the Wizard, click **Add New Agency**. Enter the Agency Name, Contact Name, Telephone Number, and Email Address in the **Enter Agency Information Grid** (the Agency Grid). When finished, click **Save Changes** (if you prefer to add and save agencies one at a time) or **Done** (to save additions all at once). Each agency that you added appears with a checkbox to its left. Click the checkbox next to the agency(s) involved in the project. g) **Step 7 – Select Project Start Date** i) Select a **target start date** for the EA or EIS (the project). If no date is chosen, the Wizard automatically selects the current date as the project's target start date. The Wizard uses the target start date to generate the timeframe for the EA or EIS. ii) **Will this be an**:** Check either Environmental Assessment or Environmental Impact Statement. iii) Click **Create** to create the project. After you click **Create**, the Wizard automatically generates a default timeframe for the EA or EIS. The timeframe for the EA is 12 months; the timeframe for the EIS is 36 months. You can renegotiate this timeframe as needed up to the project's FHWA lock-in date.

Wizard Process Guides—Open / Saving / Deleting a Wizard File

Opening an Existing Wizard Project	1) Select **Projects** on the menu bar. 2) Select **Open**. 3) Select the project you want to open from the list of projects and click **Open**. a) Alternative method: Click the **Open** icon that appears under the menu bar.
Saving a Wizard Project	1) Select **Projects** on the menu bar and select Save. The project will be saved under the name it was given during Project/Create. You can also save a project by clicking on the **Save** icon under the menu bar.
Deleting a Wizard Project	1) Click Projects on the menu bar and select Open. Select the project you want to open from the list of projects and click Delete.

Wizard Process Guides—Exporting/Importing a Wizard Project

Exporting a Wizard Project	1) Open the project you want to export. 2) Select **Projects>Export** on the menu bar. 3) Click **Export**. 4) Open a folder on your computer, name the project file, and click **Save**. 5) The Wizard begins the export process. After the export process is complete, click **Done** to exit. 6) The project file is now available in the computer folder. Attach the project file to an email and send to another Wizard user or exchange the file through removable storage. A Wizard project file has a .wiz file extension.
Importing a Wizard Project	1) Save the Wizard project file you received to a folder on your computer. 2) Open the Wizard. 3) Select **Projects>Import** on the menu bar. 4) Click **Import**. 5) Locate the saved project in the folder. Click **Open**. 6) The Wizard begins the import process. After the import process is complete, click **Done** to exit. 7) Select **Projects>Open** from the menu bar to open the imported file (or click the Open icon under the menu bar). 8) Click **Cancel** prior to initiating the import or export process to cancel the process.

Wizard Process Guides—Renegotiating a Wizard Timeframe

Renegotiating a Wizard Timeframe	1) In the Project Requirements Panel, select the requirement you want to renegotiate. 2) Click the Timeframe Tab. 3) Click the **Steps** view. 4) Click **Renegotiate Timeframe**. 5) The timeframe for the requirement appears. Add or change dates by using the dropdown calendar or by typing the date directly in the field in the mm/dd/yr format. 6) When finished, click **Done**. 7) The Wizard will ask you to enter a reason for the renegotiation in the Reason for Renegotiation text box. Enter the reason and click OK. Note: Document your renegotiations thoroughly. This information can be reviewed on the Renegotiation History report. 8) The Wizard will then ask if you want to print a copy of the timeframe. Click **Yes** if you want to print the timeframe or click **No** if you do not want to print the timeframe. The timeframe can be printed later on the Timeframe report.

Wizard Process Guides—Adding Unique Steps to a Wizard Timeframe

Adding Unique Steps to a Wizard Timeframe	1) In the Project Requirements Panel, select the requirement you want to renegotiate. 2) Click the Timeframe Tab. 3) Click the **Steps** view. 4) Click **Renegotiate Timeframe**. (The timeframe for the requirement appears.) 5) Click **Add Step**. 6) Follow the instructions in the **Add New Step to Requirement** Box. 7) Add one or multiple steps. 8) Click **Done** when you are done adding steps (this ends the Add New Step process). 9) Click **Done** again to end the Renegotiate Timeframe process. 10) Enter a reason for the renegotiation. 11) The Wizard will then ask if you want to print a copy of the Timeframe. Click **Yes** if you want to print the Timeframe or click **No** if you do not want to print the Timeframe. The new step(s) appears in the timeframe and on Wizard reports.

Changing Project Type	1) Open the project. 2) Click the Overview Tab. 3) Click **Change Project Type**. 4) Enter a target start date for the EA or EIS. By default, the target start date that appears is the same as target start date of the former project type. 5) Follow the on-screen guidance. 6) You can also change the project type by going to **Options>Project>Change Type** on the menu bar.

Wizard Process Guides—Adding / Removing Federal Requirements

Adding / Removing Federal Requirements (after Project / Create)	To add a Federal requirement to a project: 1) On the Project Requirements Panel, double-click the requirement to be added to the project. 2) A window appears asking, “Do you want to add this requirement to the project?” Click **Yes** if you would like to add the requirement or No if you would like to cancel the process. To remove a Federal requirement to a project: 1) On the Project Requirements Panel, double-click the requirement to be removed from the project. 2) A window appears asking, “Do you want to delete this requirement from this project?” Click **Yes** if you would like to delete the requirement or No if you would like to cancel the process. Requirements removed from a project can be added back in to the project as needed.

Wizard Process Guides—Working with Cooperating/Consulting Agency Info

Working with Cooperating/Consulting Agency Info	To add an agency to a project already in agency database: 1) Go to the Overview Tab. 2) Click **Add Agency to Project**. 3) Select agencies from this list that you want to add to the project. 4) Click **Done** to add agencies to the project. 5) Click **Save Changes** to save your changes to the project. To add an agency to a project that is NOT in the agency database: 1) Go to **Options>Agency>Add/Modify** on the menu bar. 2) Add the agency name and contact information directly into the agency data grid. 3) Click **Done**. This adds the agency to the agency database. 4) Click Add **Agency to Project** to add the new agency to the project. 5) Select the new agency and click **Done** to add the agency to the project. 6) Then click **Save Changes** to save your changes. To add delete an agency from a project: 1) Go to the Overview Tab. 2) Locate the agency you want to delete in the agency grid. 3) Highlight the row containing the agency and press the DELETE key. 4) This removes the agency from the project but not from the agency database. The agency with its associated contact information will appear in Project/Create next time you create a project. To designate agency type cooperating, consulting, or other: 1) Go to the Overview Tab. 2) Locate the agency name in the agency grid on the Overview Tab. 3) Locate the agency row. 4) Click on dropdown arrow in the **Type** column. 5) Select the agency type. 6) Click **Save Changes.** To change contact information associated with an agency for any given project:

	1) Go to the Overview Tab. 2) Select the field (Contact Name, Phone, Email, Agency Type) in the agency grid and type in new information. 3) Click **Save Changes.** Note: changes to contact information will be saved in the current project only. The original contact information associated with the agency will not change.

Selecting/Generating/ Printing Wizard Reports	The Wizard offers the following reports: ▪ Project Overview—This report displays summary information about a project, including the ▪ target start and end dates, agency and contact information, project duration, and date of the ▪ project requirements' last renegotiation. ▪ Projects List—This report lists all projects (EISs and EAs) you have created in the Wizard. ▪ Project History—This report lists all selected Federal requirements for any given Wizard EIS or EA project. ▪ Project Gantt Chart—This report displays a Gantt chart for the EA or EIS and Federal requirements. ▪ Negotiated Timeframe—This report displays the timeframe for the EA or EIS, or the selected Federal requirement. It lists the lead, cooperating, and consulting agencies involved in the project. ▪ Renegotiation History—This report displays the date(s) and reason(s) for renegotiation for one or multiple requirements. To generate a Wizard report: 1) Select **Reports** on the menu bar and select the type of report you would like to generate. 2) The report appears in a new window (the report window). 3) Use the controls at the top of the report window to scroll through the report. To print a Wizard report (except for Gantt chart): 1) Generate the type of report you would like to print. 2) In the report window, click **Print**. 3) Choose the print commands and print. Reports can also be selected by clicking the dropdown arrow next to the Preview Project Status icon under the menu bar.

Wizard Process Guides—Printing Gantt Charts

Printing Gantt Charts

Gantt charts use a different printing process than the one just described for the other reports:

1) Select **Reports>Project Gantt Chart** from the menu bar.
2) Select the requirement(s) that you want to appear on the Gantt chart.
3) The Gantt chart report appears in a separate window (Gantt chart report window).
4) Select Print.
5) Choose the print commands and print.

Remember: The requirement(s) that you select to view on the Gantt chart, or view then print, must have a timeframe (must have target start and end dates). The Wizard will not display a Gantt chart for a requirement that has an empty timeframe (no dates entered). You can also print a Gantt chart from the Gantt Tab. Select the requirement you want to print and click Print. The requirement displayed in the Gantt chart will be printed.

Gantt Charts Print Options

1) Gantt charts can be printed in Portrait or Landscape format.
2) Gantt charts can only be printed on 8.5” x 11” paper at this time. The chart prints in sequence over multiple pages.
3) For best printing results, use the default Gantt chart Printer Settings. These are:
   a) Width: 725 pixels
   b) Height: 1000 pixels
   c) Scale: 100%
4) Select Timeframe Print Settings to print a subsection of the Gantt chart. Select the Start Date and End Date for the period of the Gantt chart you want to print.

Exporting Reports	The Wizard can export a report to the following file formats: Rich Text Format (RTF), PDF, Plain Text, or HTML. Note: At this time, the Project Gantt chart report cannot be exported to any of these file formats. To export a Project Report: 1) Generate the report. 2) In the report window, select **Export To**. 3) Select the file type for the report. 4) Open a folder on your computer and click **Save**. 5) Enter a file name and click Save. 6) Retrieve the report when needed.