2.1 Creating a Proposal

Background:

A Proposal is one or more projects grouped together for advertising, award and administration. Any project items that are marked to Roll Up into one item for bidding will do so at the Proposal level. There are two ways to create a proposal:

From the controlling project: Following this method pulls information from the project to the corresponding proposal fields (such as, but not limited to the location and primary region). If there will be more than one project included in the proposal, the proposal data may need to be modified to include additional project information and the additional project(s) must be added to the proposal.

From scratch: When creating a proposal from scratch, the Proposal User then imports project data when adding the project(s) to the proposal.

Roles:

Proposal User

Navigation:

Preconstruction > Project Overview

Creating a Proposal from a Project:

Option 1

1. From the Project Overview search for the project to be included in the proposal by entering at least three (3) characters of the Project ID or the Project Name in the search box.
2. Expand the project row **Action Menu**.
3. Select **Create Proposal From Project**.
4. Verify the **Proposal ID** and **Proposal Description** fields and select the **Proposal Type** and **Contract Type**.
5. Click **Save**.

Option 2

1. From the Project Overview component, search for and select your project.
2. Expand the Project Summary component **Action Menu**.
3. Select **Create Proposal**.
4. Verify the **Proposal ID** and **Proposal Description** fields and select the **Proposal Type** and **Contract Type**.
5. Click **Save**.

Creating a Proposal from scratch:

1. From the Proposal Overview component, expand the Proposal component **Action Menu**.
2. Select **Add**.
3. Enter the **Proposal ID** (the proposal ID should be the same as the Project ID on at least one of the projects within the proposal), **Proposal Description, Proposal Type** and **Contract Type**.
4. Click **Save**.

Adding or Editing General Proposal Information:

1. In the General tab, enter or modify the appropriate fields. Keep in mind that fields may be filled out at different times as the proposal progresses through the PS&E phase.

2.1 Creating a Proposal

2. The fields **Proposal ID**, **Federal Project Number**, **State Project Number**, **Proposal Description**, **Primary Borough ID**, **Primary Region ID**, **Proposal Type**, **Contract Type**, **Type of Funding**, and **NOA to DOL** should be populated prior to advertising (see Managing Projects on a Proposal to import information from the controlling project).

Note: When checked the **NOA to DOL** box along with several other criteria addressed later in the letting process will automatically send an NOA to DOL when the Proposal is awarded

3. Click **Save**.

Managing Projects on a Proposal

1. If the project is not already included in the proposal, on the Projects tab, click the **Select Projects** button.
2. Search for and select the project(s) to be added. Projects selected will be noted with a green checkmark.
3. Click the **Add to Proposal** button on the lower right of the selection window.
4. Designate the Controlling Project by checking the **Control Proj** box in the project row.
5. Click **Save**.
6. Expand the row **Action Menu** for the controlling project row.
7. Select **Import Project Data** to pull Project Summary information into the Proposal Summary component.

Adding Proposal Time

1. Every proposal must have a main contract time. In the Time tab, click **New**.

2. From the **Time Type** dropdown, select the appropriate time type (Completion Date, Calendar Days, or Working Days). The time type selection will make either the Completion Date Calendar field required or the Number of Days field required.
3. In the **Liquidated Damages Rate** field, enter the correct liquidated damages rate per day for your proposal.
4. Click the **Completion Date** calendar icon and select the appropriate date or in the **Number of Days** field, enter the number of calendar days in which the contractor has to complete the project.
   a. If your proposal time is calendar days which must be completed before a completion date, select Completion Date as your time type, but input the calendar days in the Number of Days field.
5. Click **Save**.

Managing Proposal Workflow

1. If you created the proposal from the project you may need to only review the workflow. If you created your proposal from scratch, click the Workflow tab.
2. From the **Workflow** dropdown, select **Alaska DOT&PF**.
3. From the **Workflow Phase** dropdown, select the appropriate workflow phase.
4. Click **Save**.

Next Steps:

The proposal is ready to organize the project items and categories into sections. See the QRG – *Generating Proposal Sections*.