3.3 PSA - Creating and Managing Addenda

Background:

An addendum will only be created, and any changes made in AWP once all the pieces of the addendum have been gathered and approved. Because addenda may include plans or spec changes (changes outside of the information entered in AWP Preconstruction), the addenda area of AWP is primarily a mechanism to update the Bid Express ebsx files and a way to update the PSA calendar website to reflect when addenda have been issued.

Roles:

PSA User

Navigation:

Dashboard > Proposal Overview > Proposal

1. On the Proposal Summary component, click the **Addenda** quick link.
2. Click the **New** button.
3. In the **Add/NTB** field, search for and select **Addendum 1** (or whichever number is appropriate).
4. In the **Number of Pages** field, enter the total number of pages of the addendum.
5. From the **Issuing Officer** dropdown, select the appropriate issuing officer for the addendum.
   a. If the Issuing Officer dropdown list needs to be updated, please let a Module Administrator know.
6. Click **Save**.
7. Expand the Addendum Summary **Component Actions Menu**.

8. Select **Open**.
   a. When an addendum is open, AWP tracks any changes made to the proposal or associated project(s).
   b. Jump to Step 9 for the kind of addendum that's being issued (Adding/Modifying items or Postposing a letting). If the addenda is completely outside of AWP, jump to *Approving an Addendum*.

Adding or Modifying Items via Addendum

9. Click the **Proposal** quick link (the blue notification banner should be indicating the Proposal is in the Advertising workflow).
10. Select the **Projects** tab.
11. Click the **Project** link.
12. On the Project Summary component, click the **Categories and Items** quick link.
13. Select the **Items** tab.
14. To modify an item, click the **Expand/Collapse** arrow for the item you want to modify.
15. Make any necessary changes and repeat for any items that require modification.
16. Click **Save**.
17. To add a new item, click the **New** button.
18. In the **Item ID** field, search for and select the item to add.
19. Enter a **Bid Schedule Supplemental Description**, this is the supplemental description the contractor sees.
20. In the **Quantity** field, enter 0.
21. In the **Project Item Unit Price** field, enter 1.
22. From the **Category ID** dropdown, select the category to which the addendum item should be assigned.

23. In the **Proposal Line Number** field, type the appropriate proposal line number (look at the last proposal line item and add an increment of 10).
24. Click **Save**.

Notes:

- If the item should be inserted between two existing items, enter a number that lies between the two existing items line numbers. For example, if the addendum item should be between existing line numbers 110 and 120, enter any number in between those two numbers, like 115.
- If you are unsure which line number to assign, run the Bid Tab Analysis report (from Global Reports) to identify the correct proposal line number to enter.

25. To assign the new item is to a current fund package, click the **Funding: Assign to Items** quick link.
26. Select the radio button associated with the correct fund package.
27. Click **Save**.

Regenerate proposal sections and items.

28. Navigate back to the Proposal, and from the Proposal Summary component, click the **Sections and Items** quick link.
29. Expand the **Component Actions Menu** and select **Auto Generate Sections**.

Postponing a Letting via Addendum

9. From the Addenda summary click the **Proposal** quick link and then the link for the **Bid Letting** to be postponed.
10. In the Bid Letting Summary, expand the **Component Actions Menu**.
11. Select **Add New**.
   a. The Quick Add Bid Letting component will appear.

12. In the **Letting ID** field, enter the old letting ID and add _1 on the end (i.e. NFHWY00404_1).
13. In the **Letting Date** field, click the calendar icon and select the new letting date.
14. In the **Original Letting ID if Postponed or Re-Let** field search for and select the Original Letting ID.
15. In the **Letting Status** field, select **Scheduled** from the dropdown.
16. Enter the **Let Time**, **Letting Location** and **Adv Date**.
17. Click **Save**.
18. From the **Previous** dropdown, go back to the Bid Letting Summary for the letting you are postponing.
19. Click on the **Proposals** tab.
20. Expand the proposal **Row Actions Menu**.
21. Select **Postpone**.
22. Search for and select the new letting you just created. The selected letting will have a green checkmark next to it.
23. Click the **Postpone** button.
   a. A green message bar will appear letting you know the postponement was successful and the proposal will disappear from this letting.
24. Click the **General** tab.
25. From the **Letting Status** dropdown, change the status to **Re-scheduled**.
26. Click **Save**.

Approving an Addendum

9. Navigate to the Proposal and at the top of the page click the **Addenda** quick link.
10. Expand the proposal **Component Actions Menu**.
11. Select **Approve**.

3.3 PSA - Creating and Managing Addenda

Final Addendum Processing

12. Click the **Proposal** quick link at the top of the Addenda page. From the Proposal Summary component expand the proposal **Component Actions Menu**.
13. Select **Addendum/Notice to Bidders Cover Page** report.
14. From the **Addenda Number** dropdown, select the Addendum for which you want to run the report.
15. Click **Execute**.

Upload Addendum to Bid Express

1. If the Addendum is postponing a letting jump to the *Postponing a Letting in BidExpress* section.
2. If the letting was not postponed navigate to the proposal, select the **Component Actions Menu** and click **Export to Bids with Gen**, select the region **Configuration File** and press **Execute**. This will generate the addendum ebsx file to be uploaded to Bid Express.
   a. For more information on this process see QRG – *3.1 PSA - Exporting the Proposal for AWP Bids* .
   b. Notice that the ebsx file now has .001x after it instead of ebsx. This indicates addendum file 001. Every subsequent addendum will be .002x, .003x, etc.
3. From the Process History right click on the **ebsx** addendum link and save to the project folder on the shared drive.
4. Log into Bid Express, www.bidx.com.
5. Click on the **Agecny Admin** button.
6. In the AASHTOWare Project Bids container, click the **Upload AASHTOWare Project Bids Files** link.

7. Click the **Choose File** button and Navigate to the proposal folder on your shared drive and select the ebsx addendum file (ends in .001x, .002x, etc).
8. Click **Open**.
9. Click the **Upload** button.
   a. A green message bar will appear letting you know the ebsx Amendment file was successfully uploaded.
10. Click on the blue **Proposal** link in the success message bar to go to the Proposal.
11. From the proposal page, click the attachments link just below the green header bar at the top of the page.
12. Click the **Choose File** button.
13. Navigate to the file you want to upload, click **Open**.
14. Click the **Upload** button.

Postponing a Letting in Bid Express via Addendum

1. Log onto Bid Express, www.bidx.com.
2. Click on the **Lettings** tab
3. Click the blue **Manage Lettings** button
4. Click the **Create a Letting** button.
5. In the **Letting ID** field, enter the new AWP **Letting ID**.
6. Click in the **Letting Date** field. Select the correct date and time of the new letting (this should match the Letting created in AWP).
7. Click in the **Opening Date** field. Select the same date and time as the Letting Date field.
8. Click in the **Make Letting Visible On Field**. Select the correct date and time to make your new letting visible immediately.
9. In the **District ID** field, enter the region identification. CR, NR, or SR.

10. In the **Description** field, enter the Proposal Name.
11. Click **Save**.
    a. You will be returned to the Manage Lettings page and get a green message bar letting you know the letting was successfully created.
    b. Your new letting will appear in the list.
12. Click on the blue **Letting Date** link.
13. Click the blue **Upload Bids Files** link to upload the proposal's ebsx addendum file.
14. Click the **Browse** button.
15. Navigate to the proposal folder on your shared drive and select the ebsx addendum file (ends in .001x, .002x, etc).
16. Click **Open**.
17. Click the **Upload** button.
    a. A green message bar will appear letting you know the ebsx Amendment file was successfully uploaded.
18. Click on the blue **Proposal** link in the success message bar to go to the Proposal.
19. Now you can attach the compiled addendum PDF. From the proposal page, click the **Attachments** link just below the green header bar at the top of the page.
20. Click the **Add Files** button.
21. Navigate to the file you want to upload, click **Open**.
22. Select the **Addendum** attachment type for your PDF.
23. Click the **Upload** button.

Next Steps:

If you need to answer Bidder Questions on BidX see QRG: *3.4 PSA – Bidder Q&A*

If you are ready to open the proposals see QRG: *4.0 PSA – Proposal Opening*