Chapter 7 – Letting, Addendum & Notice to Bidders

Contents

7.1 Letting

Letting is a term that covers the time when proposals are advertised (let) through bid opening. Before the bid letting (advertisement) takes place, a letting must be created in AASHTOWare Project (AWP) to manage information associated with the letting. Then, a letting must be created in Bid Express. Information in a bid letting includes: the proposal that will be let (including addenda and notices to bidders), vendors that have registered on the Plan Holder's list, and bids that have been submitted for the proposal in the letting. There will always be only one proposal per letting. This chapter covers letting activities up to bid opening. All actions in AWP from letting creation through award will be completed by people logged into AWP in the Letting User role. Only regional contracts staff (AWP Letting Users) will have admin access to Bid Express.

The AWP Letting to Bid Express Letting Process (*Figure 7.1*)

Figure 7.1

7.2 Proposal Validation

Proposals and all associated projects must be valid before they can be included in a Letting (advertised). 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 any missing or incomplete information in the proposal, but do not check if the value in each field is correct as the information may vary greatly based on the type of proposal. Running proposal validation also performs project validations on the associated projects.

To validate a proposal:

1. Log into AWP (see chapter 1).
2. Make sure you are in the ***Letting User*** role.
3. Navigate to Proposal Overview on the dashboard (*Figure 7.2*).
4. (A) Search for and (B) select your proposal.

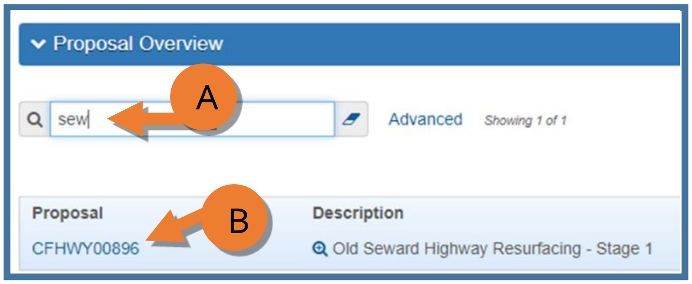


Figure 7.2

5. System validation (*Figure 7.3*):
    a. (C) Expand the Proposal Summary component **action menu** on the right side of the header.
    b. (D) Select **Validate Proposal**.

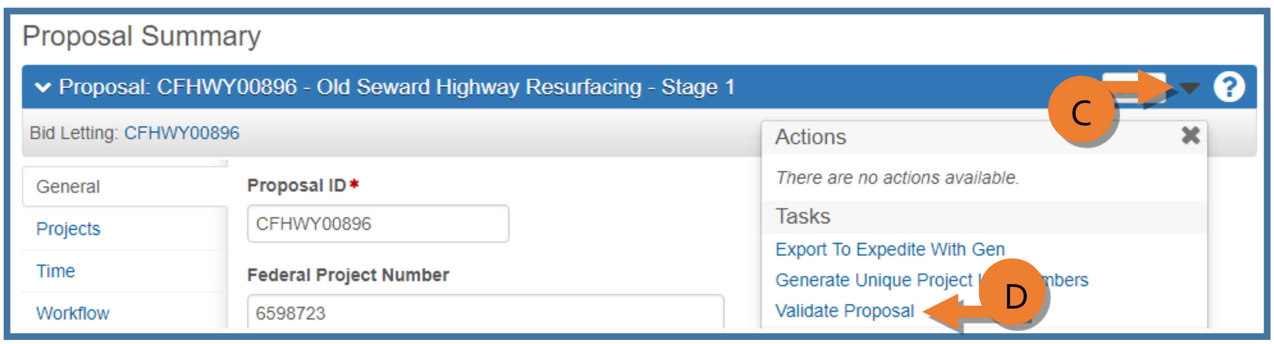


Figure 7.3

    c. A **Proposal Validation Results** window will open in a new tab and will notify you whether this is a valid proposal (*Figure 7.4*) or will list warnings for missing or invalid data (*Figure 7.5*).

NOTE: System Proposal Validation automatically runs system project validations on any associated projects.

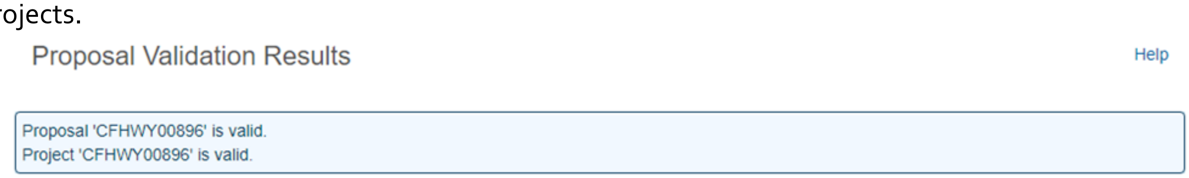


Figure 7.4

Figure 7.5

d. Correct any errors identified (except relating the the NOTE below) and validate the proposal again.

NOTE: Zero quanitity Contingent Sum items (i.e. Withholding, Traffic Price Adjustment, etc.) will appear as validation warnings (*Figure 7.6*). Each zero quantity Contingent Sum item will appear twice – once as a project item validation error and once as a proposal item validation error. If you have zero quantity Contingent Sum items on your project/proposal, double check that the errors correspond only to those items.

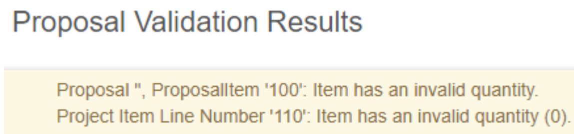


Figure 7.6

6. Report validation (*Figure 7.7*):
   a. (E) Expand the Proposal Summary component **action menu** on the right side of the header.
   b. (F) Select **Proposal Validation** report.

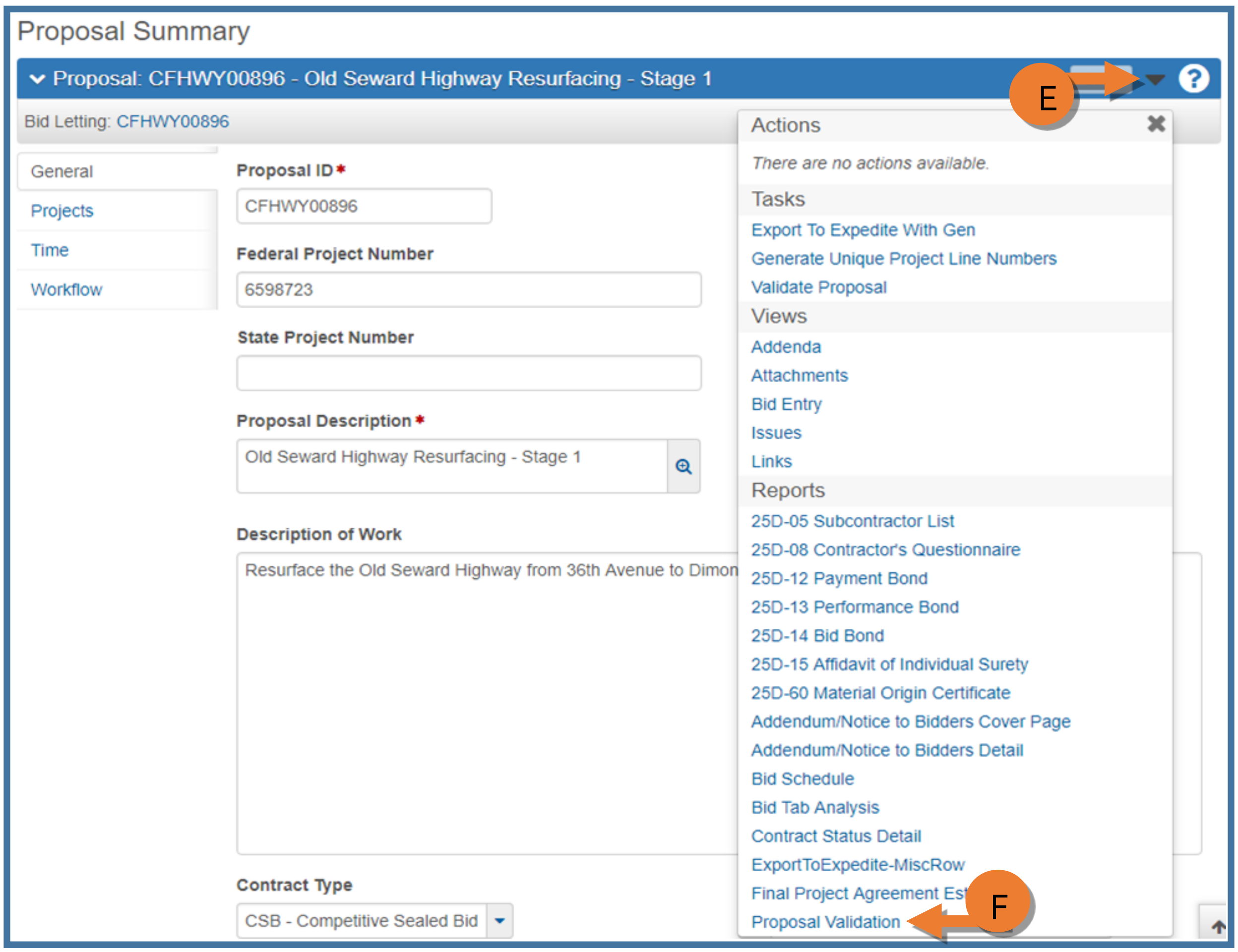


Figure 7.7

c. (G) Click **<Execute>** (*Figure 7.8*).

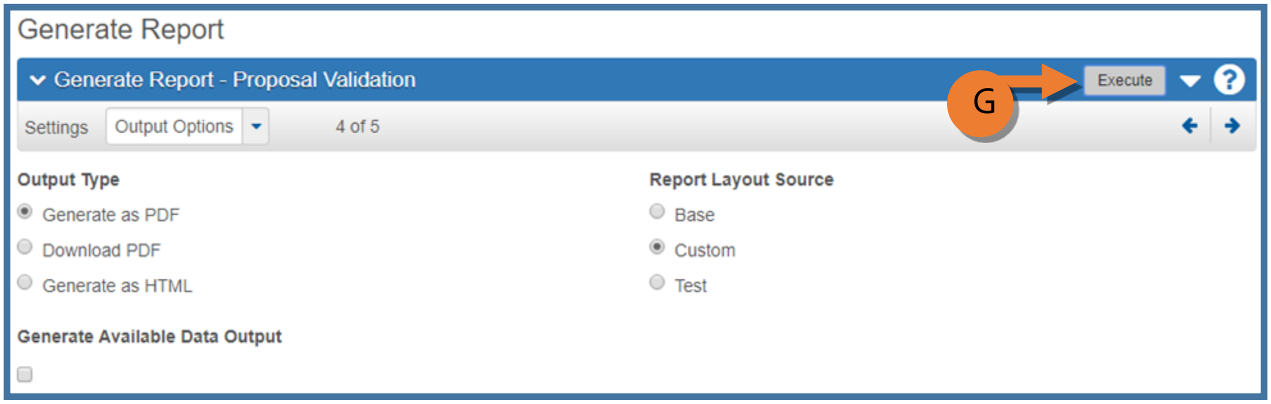
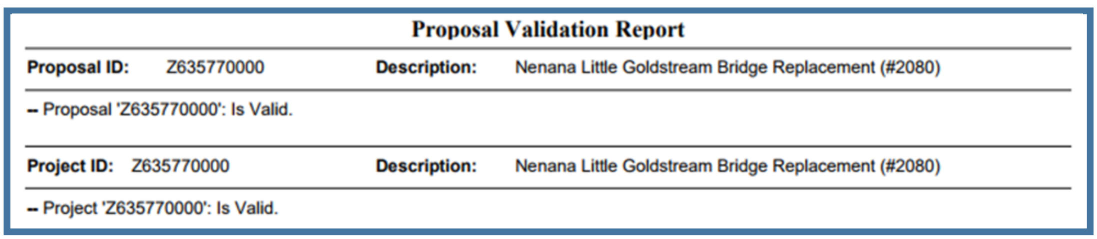


Figure 7.8

d. A new tab will open with the **Proposal Validation Report** and will notify you whether this proposal is valid (*Figure 7.9*) or will list warnings for missing or invalid data (*Figure 7.10*).



Proposal Validation Report

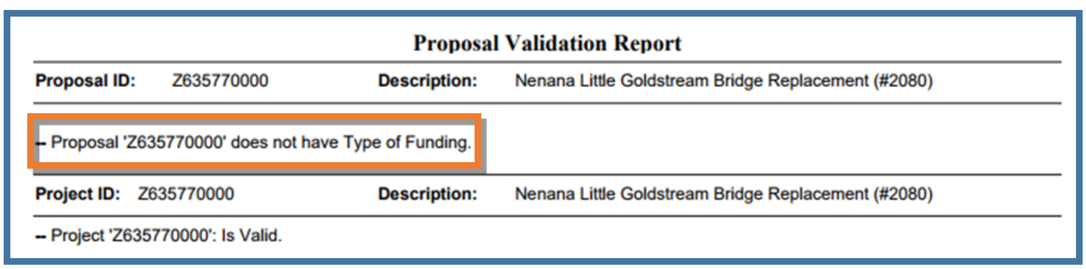
Proposal ID: Z635770000 **Description:** Nenana Little Goldstream Bridge Replacement (#2080)

-- Proposal 'Z635770000': Is Valid.

Project ID: Z635770000 **Description:** Nenana Little Goldstream Bridge Replacement (#2080)

-- Project 'Z635770000': Is Valid.

Figure 7.9



Proposal Validation Report

Proposal ID: Z635770000 **Description:** Nenana Little Goldstream Bridge Replacement (#2080)

-- Proposal 'Z635770000' does not have Type of Funding.

Project ID: Z635770000 **Description:** Nenana Little Goldstream Bridge Replacement (#2080)

-- Project 'Z635770000': Is Valid.

Figure 7.10

7. Correct any errors identified and validate the proposal again.

7.3 Proposal Sort Order (for multi-project proposals)

For Proposals that have multiple projects and each project will have its own item list (items and categories will NOT combine into one single bid schedule), you need to tell AWP which order you want the projects listed on the Bid Forms. The Letting User and Proposal User roles have access to a special field on the Project Category to enter a number in which the project categories will sort at the Proposal level.

(*Figure 7.11*)

1. From the Proposal Summary component, (A) click the **Projects** tab.
2. (B) Click the **Project** link.
3. (C) Click the **Categories and Items** quicklink at the top of the screen (*Figure 7.12*).

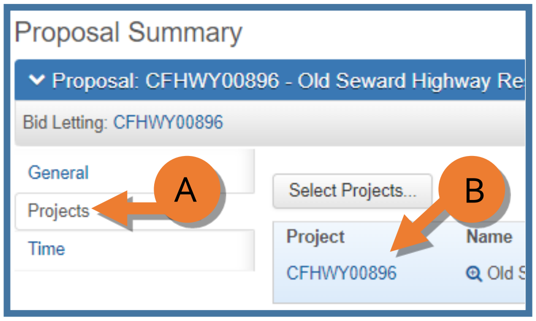


Figure 7.11

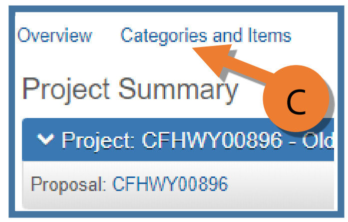


Figure 7.12

(*Figure 7.13*)

4. (D) Click the **Categories** tab.
5. (E) In the **Proposal Sort Order** field, enter the number the project category will appear on the Bid Forms.
6. (F) Click <Save>.
7. Repeat steps 1 – 6 for all projects on the proposal.

NOTE: Remember that this only applies if the Combine Like Categories function is not being used.

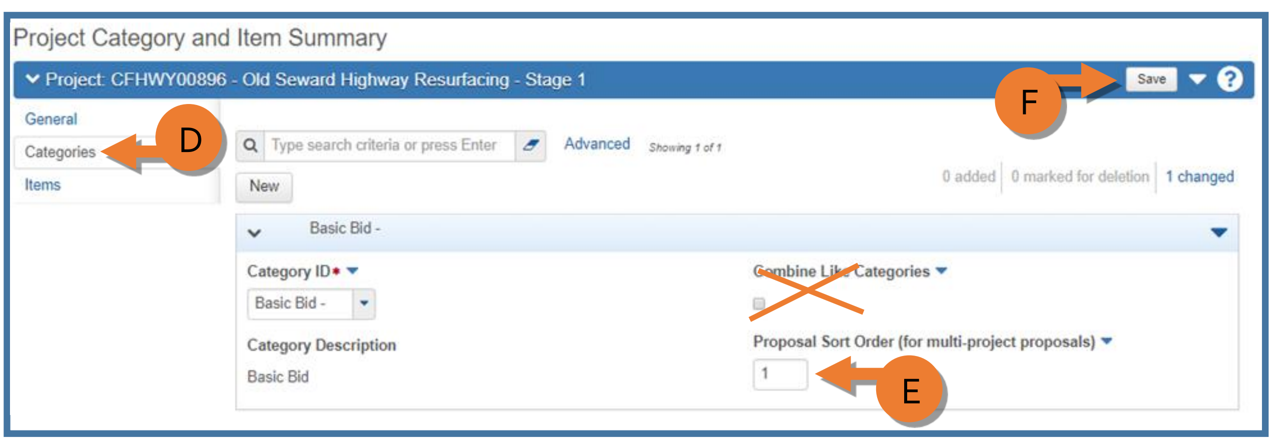


Figure 7.13

7.4 Managing Proposal Workflow

A Workflow is a set of related Workflow Phases during the Project/Proposal/Letting process. A Workflow Phase is a period in the Project/Proposal/Letting process in which data fields may be open to users to add or edit information or in which data fields are locked so users may not add or edit data as appropriate during the Preconstruction process. For example, a Workflow Phase exists for Preconstruction staff to create or edit the Project and Proposal information, but another Workflow Phase exists to lock that same info after Award. ***Proposal Users*** and ***Letting Users*** only have access to change the workflow phase. All other roles have no access to workflow.

Once the proposal and associated project(s) are valid, the proposal workflow phase must be changed to **Assigned to Letting**. The AASHTOWare Project (AWP) Letting can be created well in advance of advertising. When the proposal is ready to advertised, the workflow phase must be changed to **Advertising**. This workflow phase allows Letting Users to create Addenda and Notices to Bidders (and make addenda changes to project and proposal information).

Alaska DOT&PF has eight (8) workflow phases. For descriptions of each of the workflow phases, see chapter two (2).

To update the proposal workflow (*Figure 7.14*):

1. (A) Navigate to the **Workflow** tab on the Proposal Summary component.
2. (B) From the **Workflow Phase** dropdown, select **Assigned to Letting**.
3. (C) Click **<Save>**.

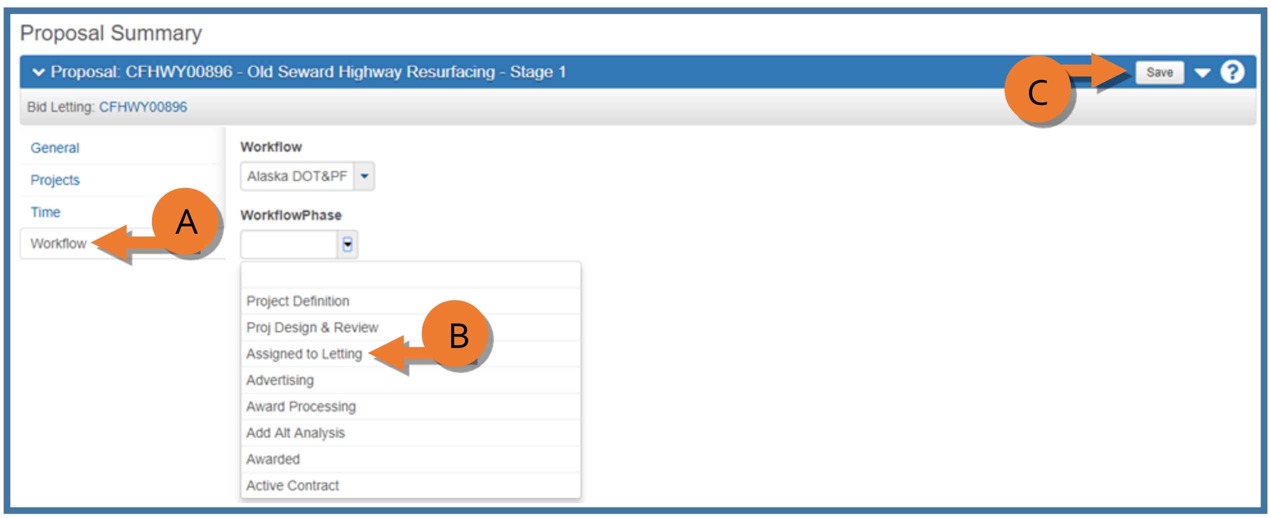


Figure 7.14

7.5 AWP Letting Creation

To create a bid letting:

1. Navigate to the Bid Letting Overview component on the dashboard (*Figure 7.15*).
2. (A) Expand the Bid Letting component **action menu**.
3. (B) Select **<Add>**.

Figure 7.15

The Add Bid Letting page will appear (*Figure 7.16*).

4. (C) In the **Bid Letting ID** field, type the Proposal ID.
   NOTE: A bid letting cannot be created from a proposal as a proposal can be created from a project. All lettings must be created from scratch.
5. (D) Click the **Advertised Date calendar icon** and select the scheduled date of advertisement.
6. (E) Click the **Letting Date calendar icon** and select the scheduled letting date (bid opening date).
7. (F) Click **<Save>**.

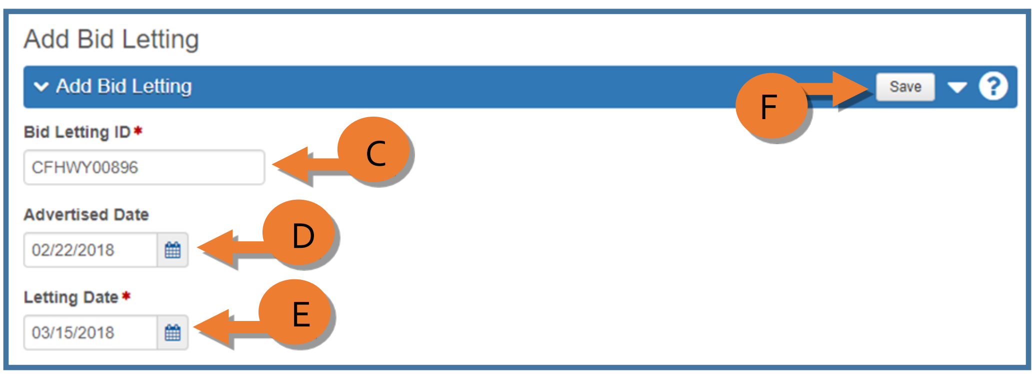


Figure 7.16

The Bid Letting Summary component will appear (*Figure 7.17*).

8. (G) From the **Letting Status** dropdown, select **Scheduled**.
9. (H) In the **Letting Time** field, enter the scheduled time for the letting (2:00pm).
10. (I) From the **Letting Location** dropdown, select the location where the bid opening will take place.
11. (J) Click **<Save>**.

NOTE: The Bid Letting Summary General tab is arranged in four (4) Containers, grouping the fields: Letting, Evaluation, Award, and Miscellaneous. The Letting container includes information necessary for creating a letting, the Original Letting Date field is only populated if the letting date is changed via addendum. Dates in the Evaluation, Award, and Miscellaneous containers will be entered as the proposal progresses through the letting process.

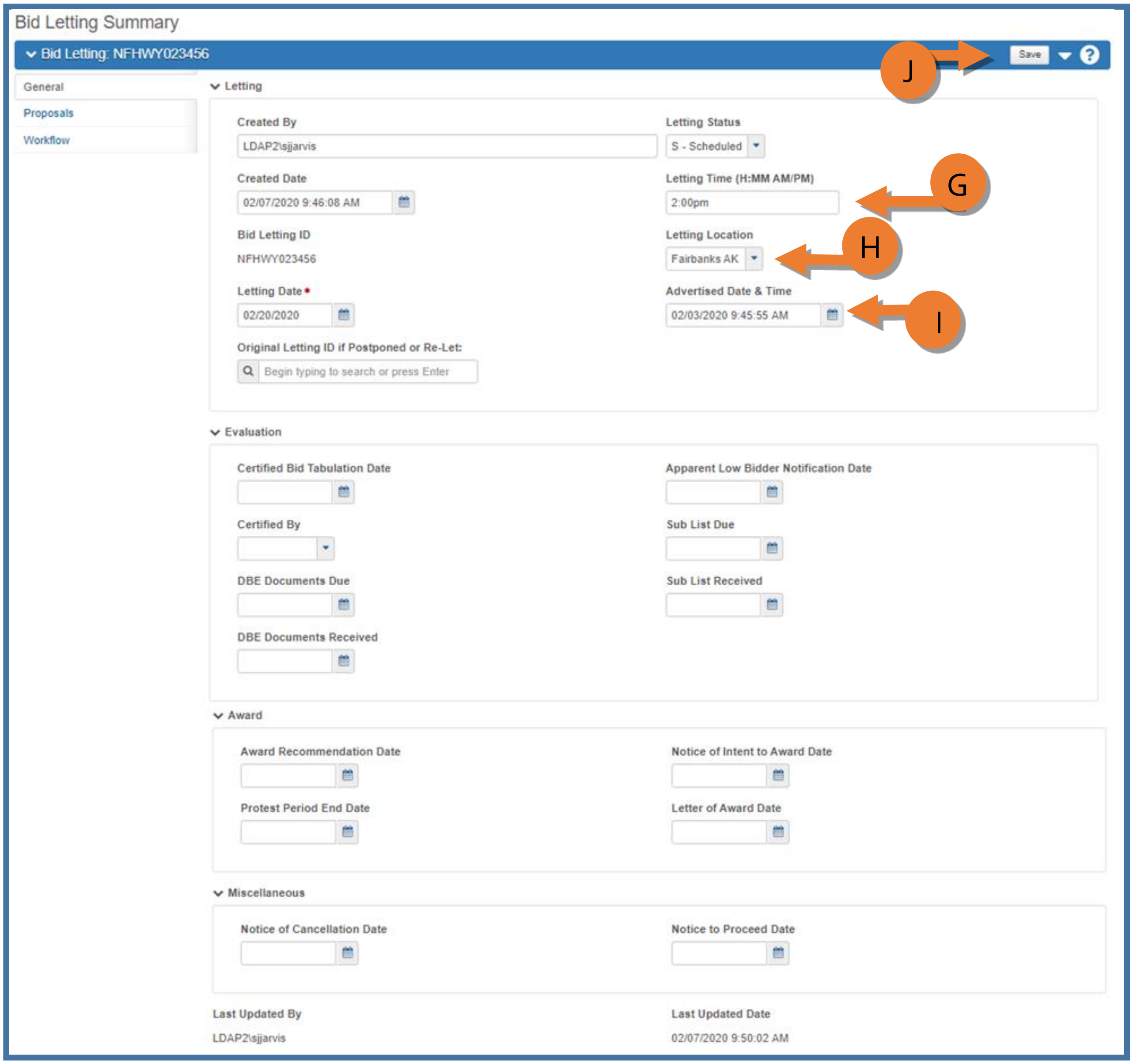


Figure 7.17

To add a proposal to an AWP bid letting:

1. (K) On the Bid Letting Summary component, select the **Proposals** tab (*Figure 7.18*).
2. (L) Click the **<Select Proposals>** button.

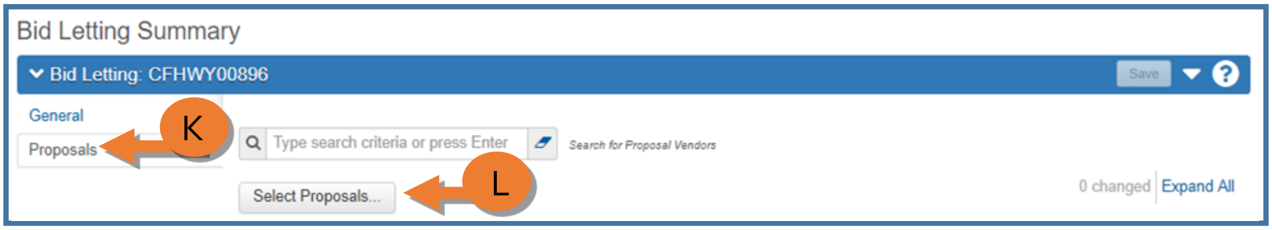


Figure 7.18

(*Figure 7.19*)

3. (M) Search for the proposal you want to add to the letting.
4. (N) Select the proposal. The selected proposal will have a green checkmark next to it. NOTE: Only proposals not already associated to a bid letting will be available to be selected.
5. (O) Click the **<Add to Letting>** button.
6. Click **<Save>**.

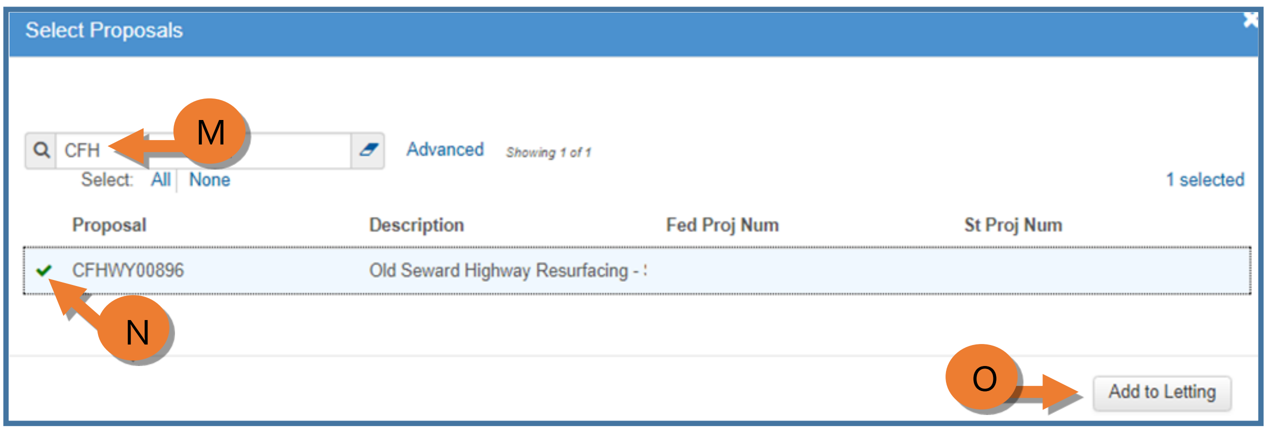
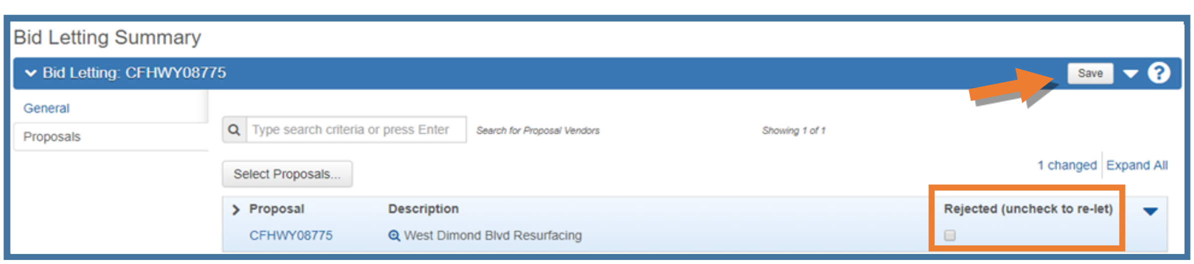


Figure 7.19

NOTE: ***For Re-Let Proposals*** – Sometimes when you go through the Copy Proposal process for re-letting a proposal (Ch 9), the rejected status also copies to the new proposal. For re-lets, make sure the **Rejected** box is unchecked on the proposal row of the Proposals tab of your letting.



To remove a proposal from an AWP bid letting (*Figure 7.20*):

1. (A) Navigate to the **Proposals** tab on the Bid Letting Summary component.
2. (B) Expand the proposal row **action menu**.
3. (C) Select **Remove**.
4. The removal will save automatically.

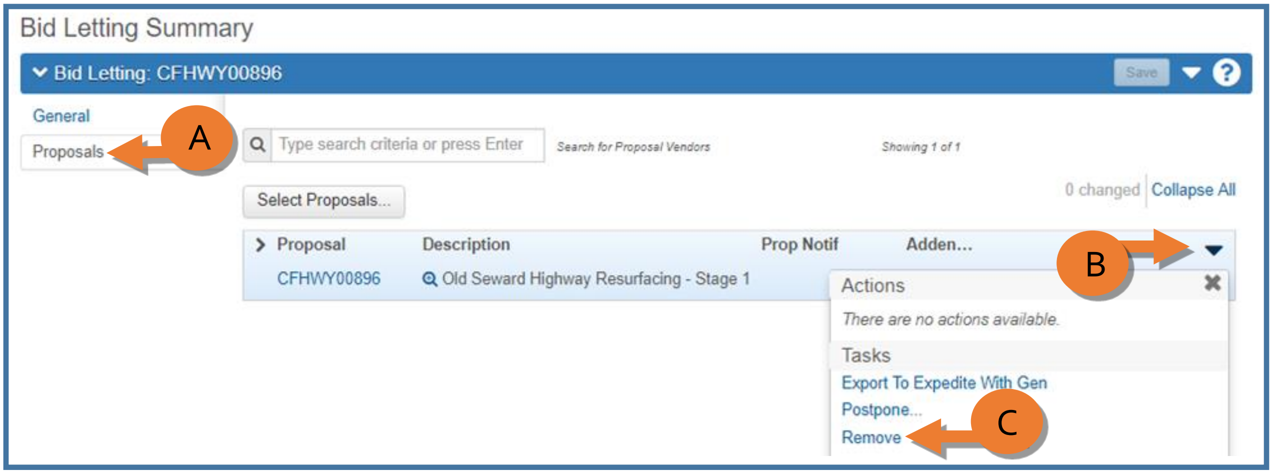


Figure 7.20

7.6 Exporting the Proposal for Use with AWP Bids

AWP Bids is a separate application that interacts with AWP Preconstruction to distribute proposal bid item information and receive item bids electronically. Once proposal item details are finalized and the proposal is ready to be advertised, it can be exported to AWP Bids which is then uploaded to the Letting in Bid Express.

To create the AWP Bids file (Export to Expedite with Gen):

NOTE: There are three different places where you can Export to Expedite with Gen.

Option 1 – Bid Letting Summary component (*Figure 7.21*):

1. (A) On the Bid Letting Summary component, expand the component **action menu**.
2. (B) Select **Export Proposals to Expedite with Gen**.
   NOTE: Most states include several proposals in each bid letting. Exporting Proposals to Expedite with Gen would export all proposals associated with a letting. Alaska DOT&PF only has one proposal per letting, so multiple proposals will not be exported by making this selection.

Figure 7.21

Option 2 – Proposals tab on the Bid Letting Summary (*Figure 7.22*):

1. (A) On the Bid Letting Summary component, click the **Proposals** tab.
2. (B) Expand the proposal row **action menu**.
3. (C) Select **Export to Expedite with Gen**.

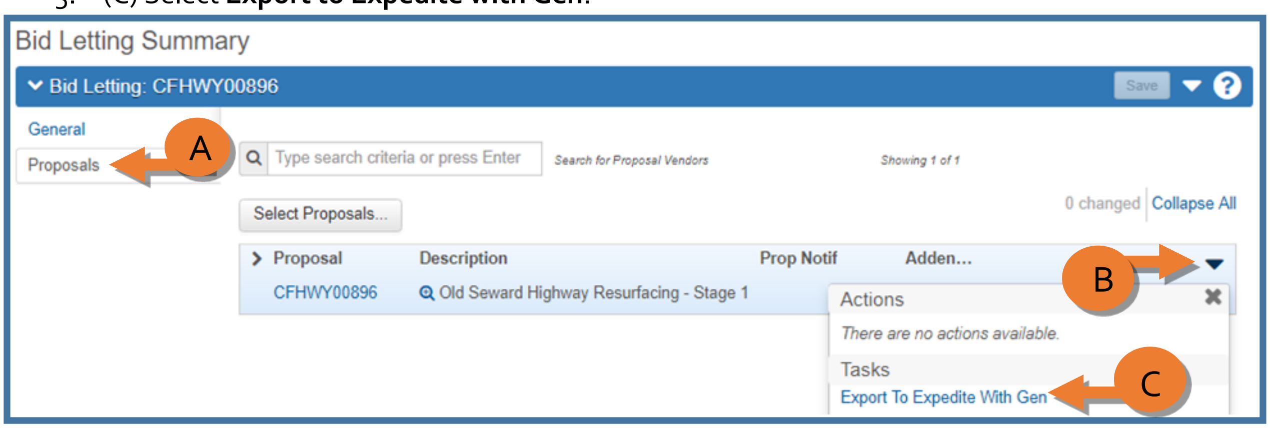


Figure 7.22

Option 3 – Proposal Summary component (*Figure 7.23*):

1. On the Proposal Summary component, expand the component **action menu**.
2. Select **Export to Expedite with Gen**.

Figure 7.23

The configuration file field should default to **gen.cfg**.

3. (C) From the **Configuration File** dropdown, select your region's gen.cfg file. (*Figure 7.24*).
4. (D) Click **<Execute>**.

Figure 7.24

A green message bar will pop up letting you know the export process has begun (*Figure 7.25*).

Figure 7.25

5. (A) Click the global **<Actions>** button (*Figure 7.26*).
6. (B) Select **Open Process History**.
   NOTE: Click the F5 key if needed to refresh the page until the process is complete.

Figure 7.26

There should be four (4) output files (*Figure 7.27*):

- pass2ebs.txt- This information creates the encrypted bids file
  - This does not get saved or posted/uploaded. It is an indicator the export was successful.
- Export.log – This is information on the export process.
  - This does not get saved.
- The proposal ebsx file – This is what is uploaded to Bid Express.
- Error.log – If the export was unsuccessful, this log will provide information.
  - This does not get saved.

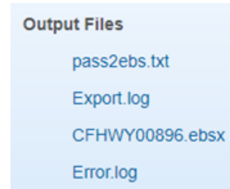


Figure 7.27

*If only the Export.log and the Error.log appear, the export was unsuccessful. Go back to Proposal in AWP and re-validate. If the proposal is valid and the export is unsuccessful a second time, contact a Module Administrator for assistance. If the ebsx file does not generate correctly and you cannot regenerate it, contact an AWP Admin who can delete the ebsx file so you can regenerate it.

7. (C) Right click on the **ebsx file link** (*Figure 7.28*).
8. (D) Select **Save link as…**.

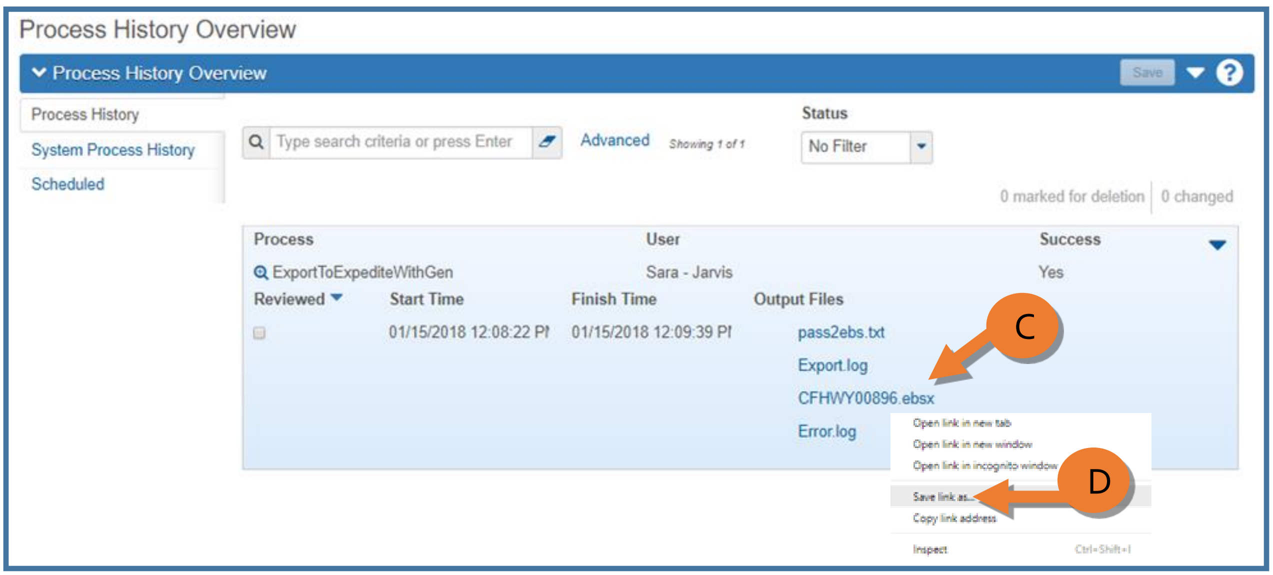


Figure 7.28

9. (E) Navigate to the AWP Bids Project file on your region/section shared drive (*Figure 7.29*). NOTES:
   - It is very important that this file is saved on a shared drive or in another location that is backed up, safe, and available to others in your section.
   - Do <u>*NOT*</u> change the file name. It should be your AWP Proposal ID.
   - Do not change the file type: AASHTOWare Project Bids.
10. (F) Click the **<Save>** button.

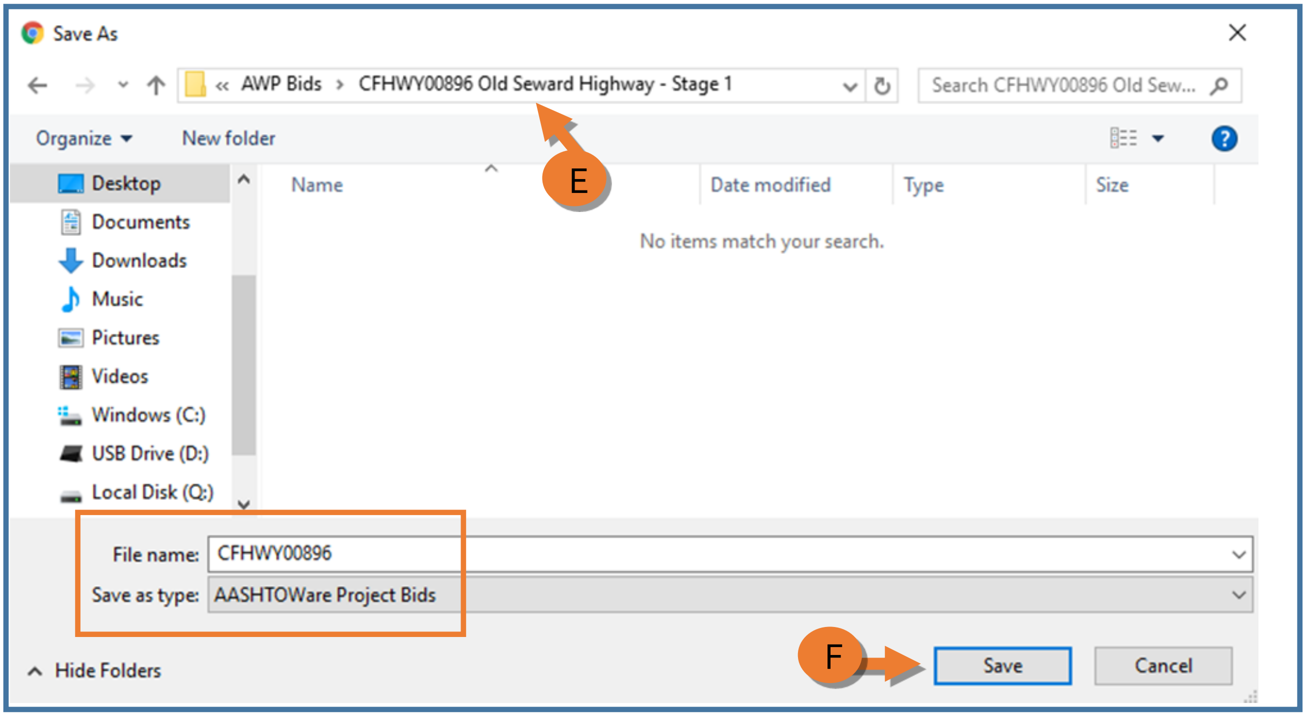


Figure 7.29

The first ebsx file, when uploaded to Bid Express, can only be accessed by Bid Express subscribers. Because Alaska DOT&PF is still allowing "paper" bids, an additional ebsx zip file must be created and attached separately to Bid Express where non-subscribers can access it.

11. Navigate to the folder in which you saved the proposal ebsx file (*Figure 7.30*).
12. (G) **Right click** on the file.
13. (H) Select **Send to**.
14. (I) Select **Compressed (zipped) folder**.

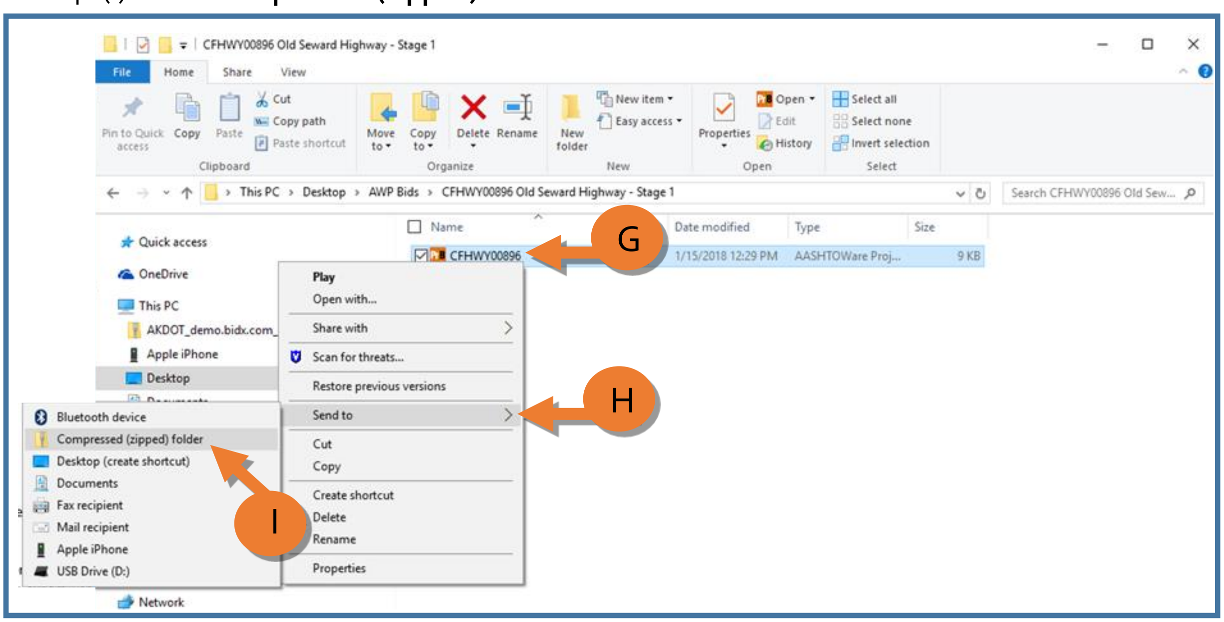


Figure 7.30

This will create a zip folder containing the ebsx file.

15. (J) Add "zip" to the zipped file name (*Figure 7.31*).

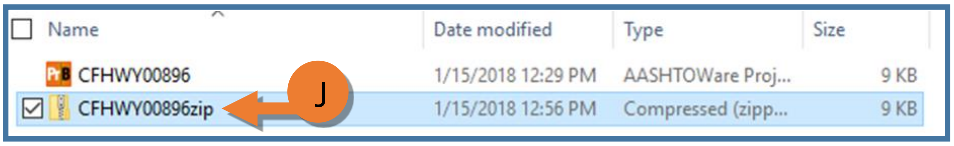


Figure 7.31

Once you have your two ebsx files and all documents to be uploaded to Bid Express, open Bid Express and create the letting.

Additional documents to upload include:

- Plans
- Specs
- Supplemental Information

NOTE: If you need to change your letting date AFTER you generate your EBSX file, but BEFORE you've created your letting in Bid Express, please contact a System Administrator to delete the original EBSX file from AWP.

Always use Internet Explorer with Bid Express

Make sure your Internet Explorer has been configured correctly. See Chapter 1 Getting Started for instructions.

1. (A) Go to www.bidx.com (*Figure 7.32*).
2. (B) Type in your email address.
3. (C) Enter your password.
4. (D) Click the **<Log In>** button.
   NOTE: You do not have to select Alaska DOT&PF from the Select a U.S. Agency dropdown. The system knows from your email address.

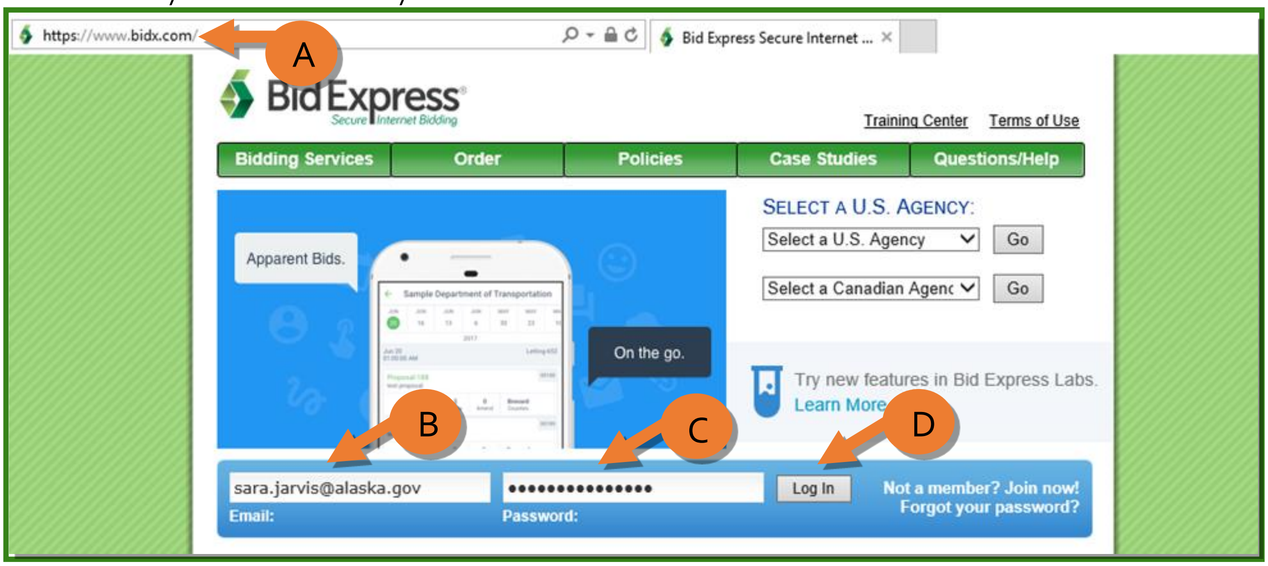


Figure 7.32

5. From the home page, click the **<Admin>** button on the top right of the screen (*Figure 7.33*).

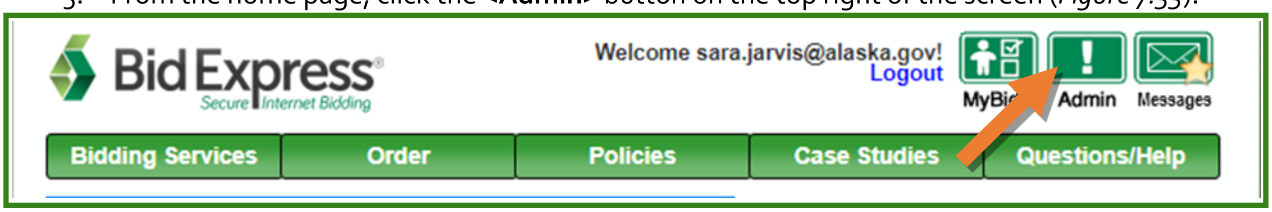


Figure 7.33

This brings you to the Manage Agency page. Notice that there is an "Admin" watermark across your screen indicating that you are in administrator mode.

6. (*Figure 7.34*) In the Letting and Vendor Data section, select **Manage Lettings, Proposals, and Bids**.

Figure 7.34

This brings you to the Manage Lettings page.

7. Click the **<Create a Letting>** button (*Figure 7.35*).

Figure 7.35

The Create a Letting box will appear (*Figure 7.36*).

8. (A) In the **Letting ID** field, enter the AWP Letting ID.
9. (B) Click in the **Letting Date** field. A calendar and time selection area will open. Select the correct date and time of the letting.
10. (B) Click in the **Opening Date** field. A calendar and time selection area will open. Select the same date and time as the Letting Date field.
11. (C) Click in the **Make Letting Visible On field**. This is the Advertised Date. A calendar and time selection area will open. Select the correct date and time for advertisement.
    NOTE: You can create the Bid Express letting well in advance of advertising. The system will hide the letting information for contractors until the Make Letting Visible On date/time.
12. (D) In the **District ID** field, enter the region identification: CR, NR, or SR.
13. (E) In the **Description** field, enter the Proposal Name. (This field cannot be edited later.)
14. Click **<Save>**.

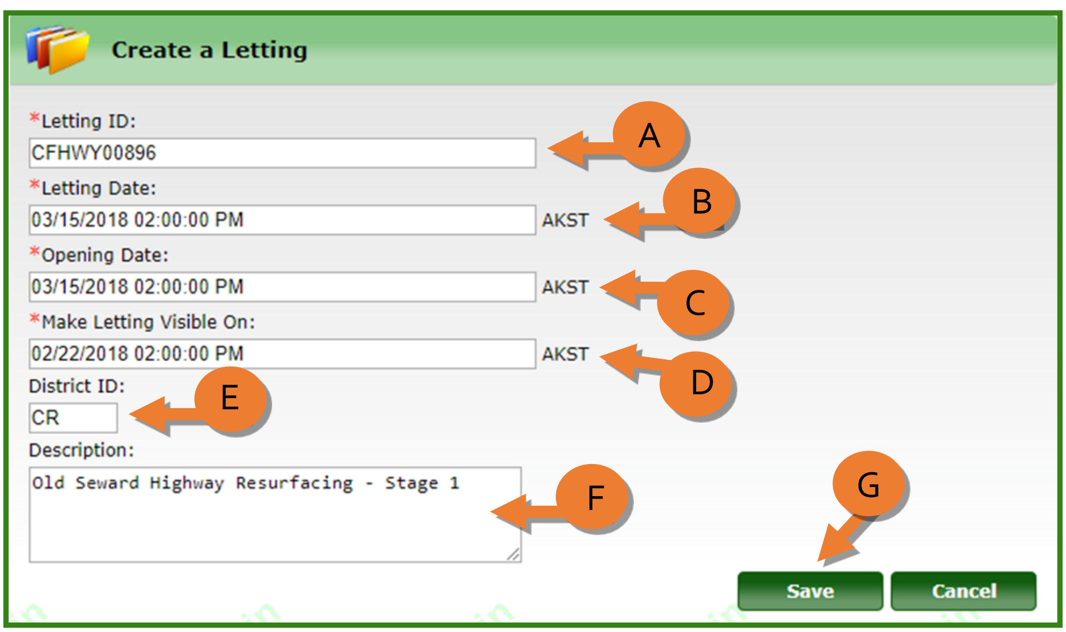


Figure 7.36

You will be returned to the Manage Lettings page and get a green message bar letting you know the letting was successfully created (*Figure 7.37*).

New Letting CFHWY00650 created for 04/19/2018

Figure 7.37

Your letting will appear in the list.

15. Click on the blue **Letting Date link** (*Figure 7.38*).

Status	Letting Date	Letting ID	District ID	Proposals	Delete
Hidden	April 19, 2018 Lake Otis and Tudor Pedestrian Upgrades	CFHWY00650	CR	0	✖

Figure 7.38

16. Click the **Upload Bids Files** link to upload the proposal's ebsx file (*Figure 7.39*).

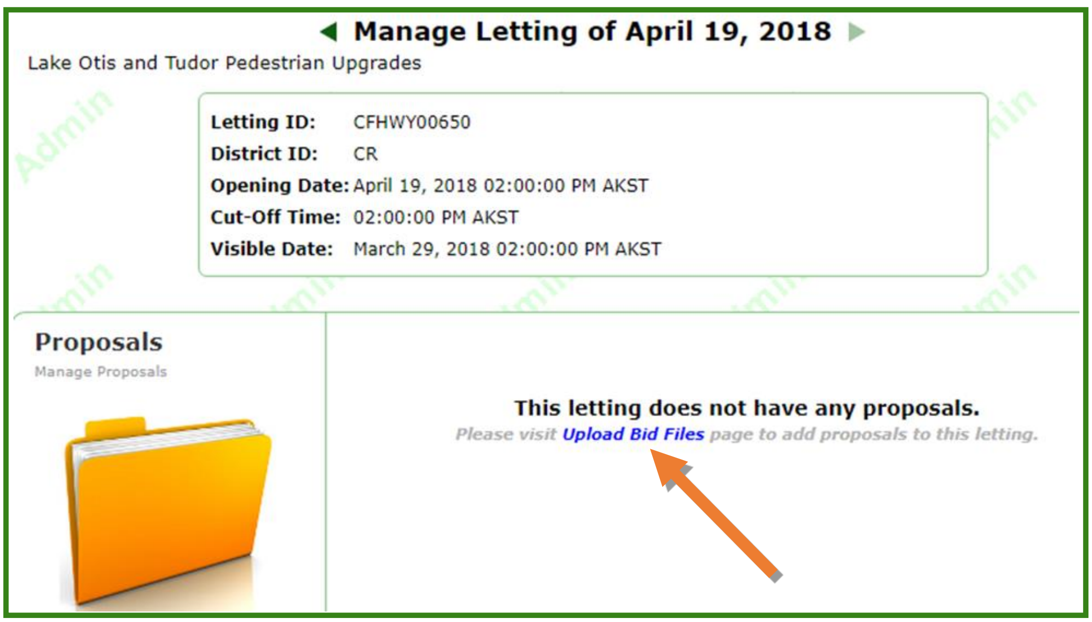


Figure 7.39

17. Click the **<Browse>** button (*Figure 7.40*).

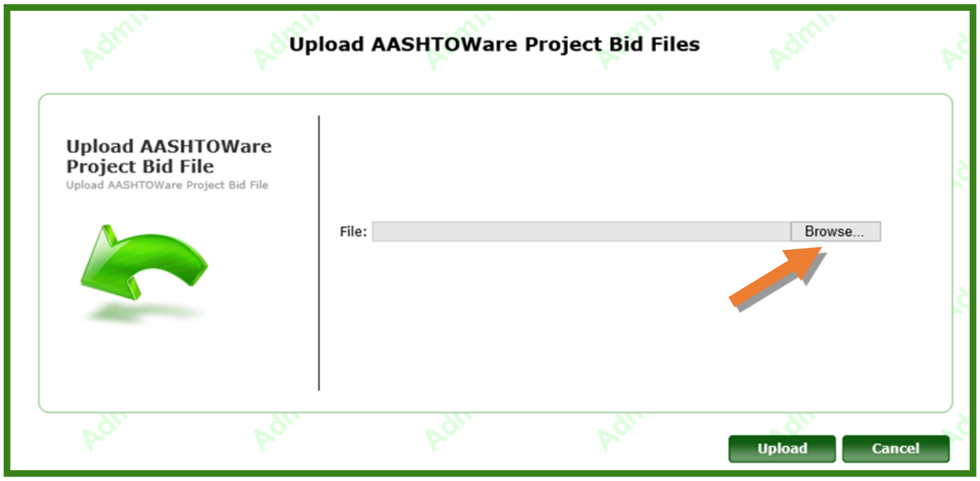


Figure 7.40

18. (A) Navigate to the proposal folder on your shared drive and select the ebsx file (*Figure 7.41*).
19. (B) Click **<Open>**.

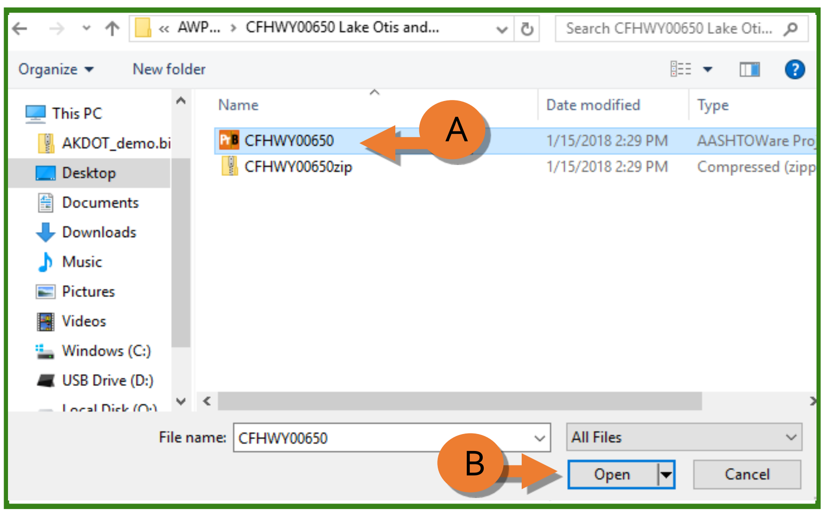


Figure 7.41

20. Click the **<Upload>** button.

A green message bar will appear letting you know the ebsx file was successfully uploaded (*Figure 7.42*).

21. Click on the blue Proposal link in the success message bar to go to the proposal.

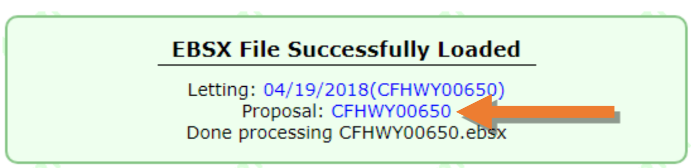


Figure 7.42

Now you can attach the ebsx zip file, bid packet, plans, specs and other necessary documents.

22. (*Figure 7.43*) On the ***proposal*** page, click the **attachments** link just below the green header bar at the top of the page.

Figure 7.43

(*Figure 7.44*)

23. (A) Click the **<Browse>** button.
24. Navigate to the file you want to upload, click **<Open>**.
25. (B) Select the attachment type:
    a. Addendum
    b. Bid Forms EBSX file
    c. Bid Opening Results
    d. Bidder Variance Report
    e. Certified Bid Tabulation
    f. Notice to Bidders
    g. Notice to Proposers
    h. Plans
    i. Specs
    j. Supplemental Information
    k. Unchecked Bid Results
26. (C) Click the **<Upload>** button.
27. Repeat to attach all necessary documents.

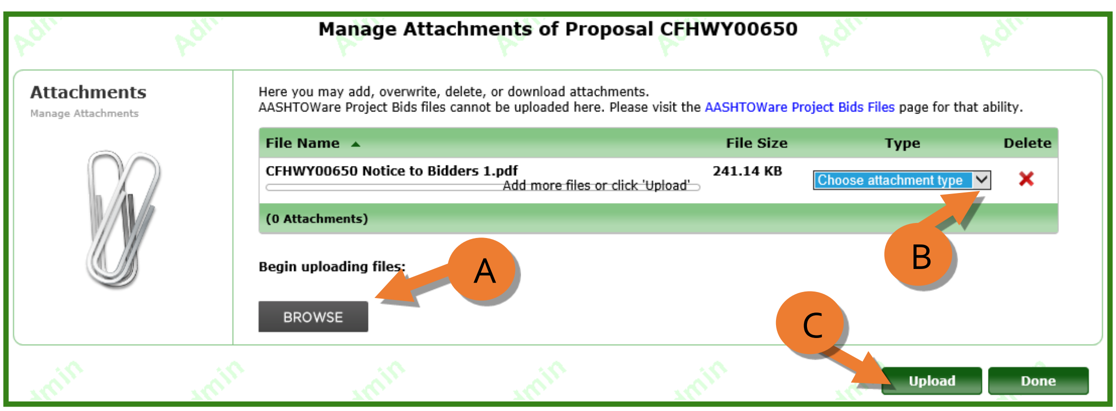


Figure 7.44

To delete an attachment, click on the red X on the attachment row (*Figure 7.45*). You may be asked to confirm the attachment deletion.

Figure 7.45

To check your attachments, from the proposal page, click the **Contractor View** link on the top left under the green header bar. This will show you what the page will look like for contractors once the Make Visible date has been reached (*Figure 7.46*). Contractors without Bid Express accounts will see everything except the item list and original ebsx file (they will see the zipped ebsx files).

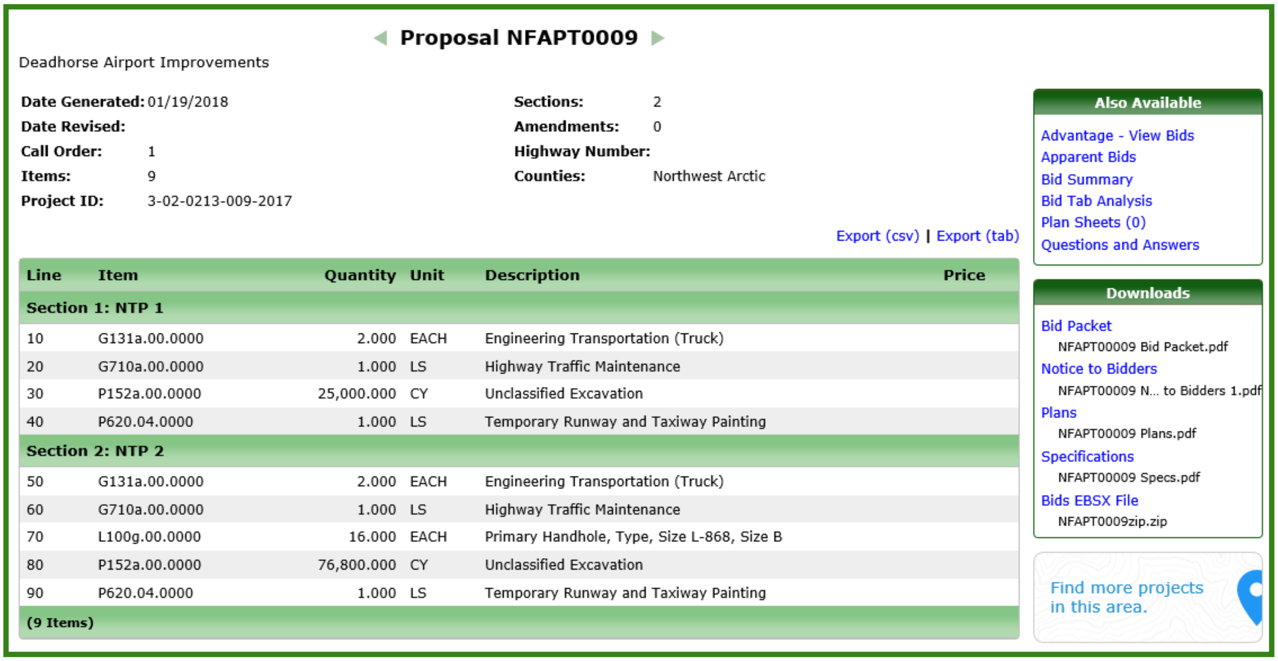


Figure 7.46

To Edit a Letting:

NOTE: If you are postponing a letting by NTB until an Addendum can be issued, see section Postponing a Letting via Notice to Bidders.

1. Navigate to the Manage Letting page for your letting. Click the **Edit Letting** link below the green header bar at the top of the page (*Figure 7.47*).

Figure 7.47

2. Edit any or all of the **Letting Time**, **Opening Date**, or **Make Letting Visible On** fields (see *Figure 7.33*).
3. Click **<Save>**.

A green message bar will appear letting you know the letting has been modified and you are returned to the Manage Letting page (*Figure 7.48*).

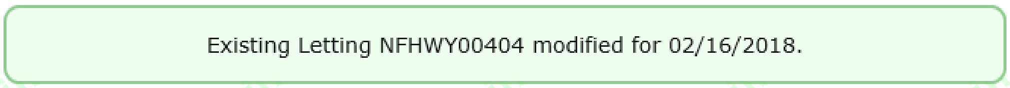


Figure 7.48

Deleting a Letting and/or Proposal:

Lettings that have proposals attached or that are past the letting date cannot be deleted. You can delete the proposal if you need to delete the letting.

To Delete a Proposal:

1. Navigate to the Manage Lettings page.
2. Click the **Letting Date** link for the proposal.
3. Click the red **X** in the Delete column for the proposal you want to delete (*Figure 7.49*).
4. Click **<OK>** to confirm the deletion.

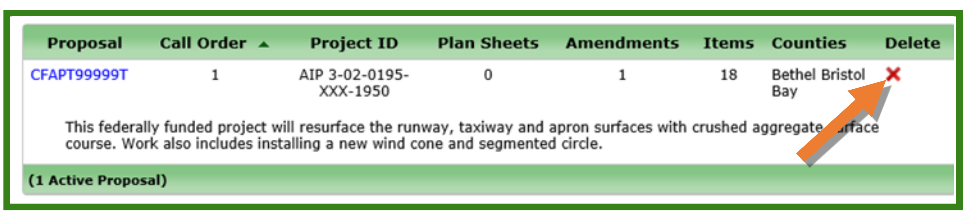


Figure 7.49

To Delete a Letting

1. Navigate to the Manage Lettings page.
2. Click the red **X** in the Delete column for the letting you want to delete (*Figure 7.50*).
3. Click **<OK>** to confirm the deletion.
   You will be returned to the Manage Lettings page.

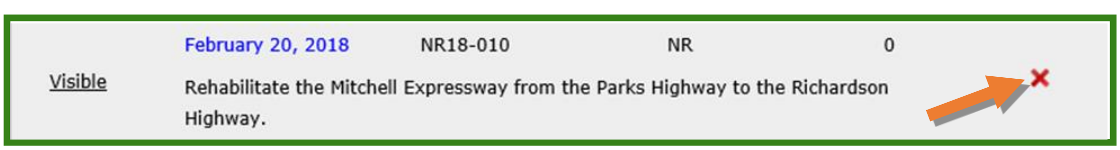


Figure 7.50

7.8 Creating Alerts

Alerts are a means of posting a message on a letting or a proposal visible to all. An alert may contain special information regarding a letting or a proposal.

To Create a Letting Alert:

1. Navigate to the Manage Lettings page.
2. Click the **Letting Date** link for the proposal you want to create an alert for (*Figure 7.51*).

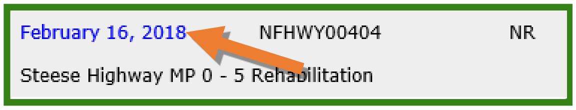


Figure 7.51

3. Click the **Alert** link just below the green header bar at the top of the page (*Figure 7.52*).

Figure 7.52

(*Figure 7.53*)

4. The current date and time will autopopulate in the entry field. Alert text always defaults to red to make it more visible. You may remove or change the date/time information or reformat the text.
5. (A) Enter the additional information about the letting.
6. (B) Click the **<Preview>** button.

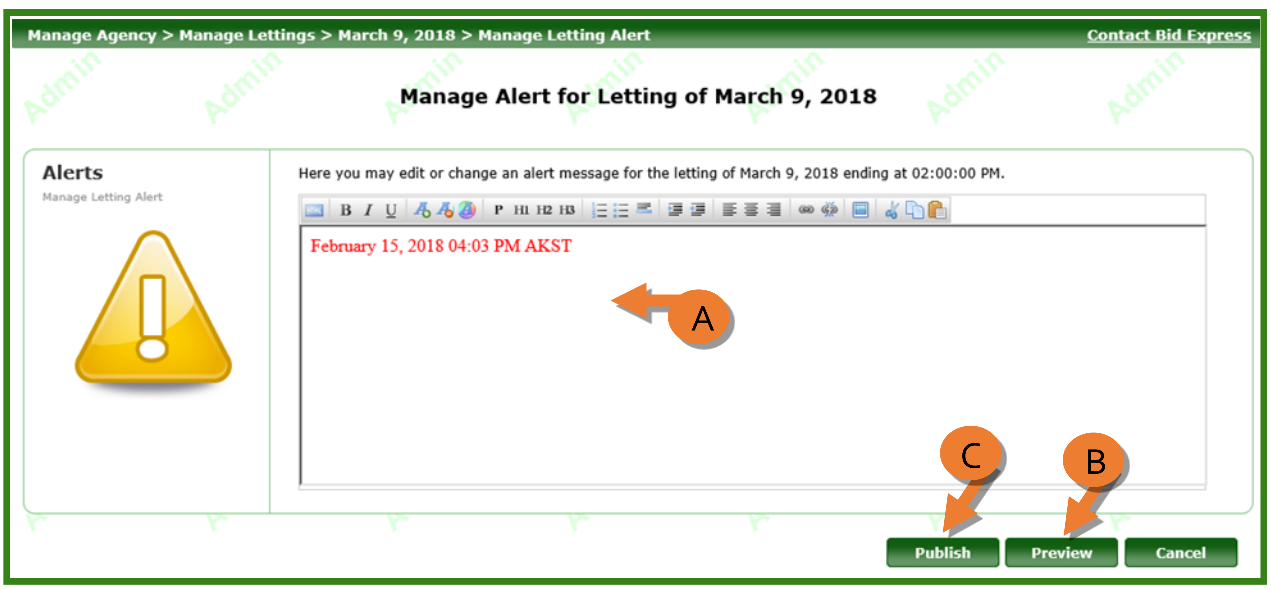


Figure 7.53

A pop up window will appear with the preview (*Figure 7.54*).

7. (C) Close the Preview pop up window and make changes or click **<Publish>** (see *Figure 7.53*). NOTE: You may modify alert information as much as necessary.

Figure 7.54

To Create a Proposal Alert:

1. From the Letting page, click the blue **Proposal ID** link (*Figure 7.55*).

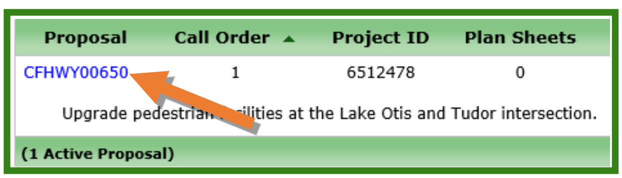


Figure 7.55

2. Click the **Alert** link just below the green header bar at the top of the page (*Figure 7.56*).

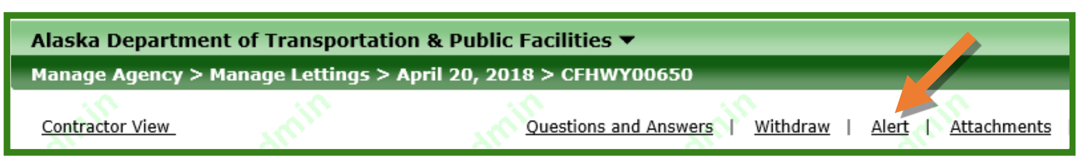


Figure 7.56

(*Figure 7.57*)

8. The current date and time will autopopulate in the entry field. Alert text always defaults to red to make it more visible. You may remove or change the date/time information or reformat the text.
9. (A) Enter the additional information about the letting.
10. (B) Click the **<Preview>** button.

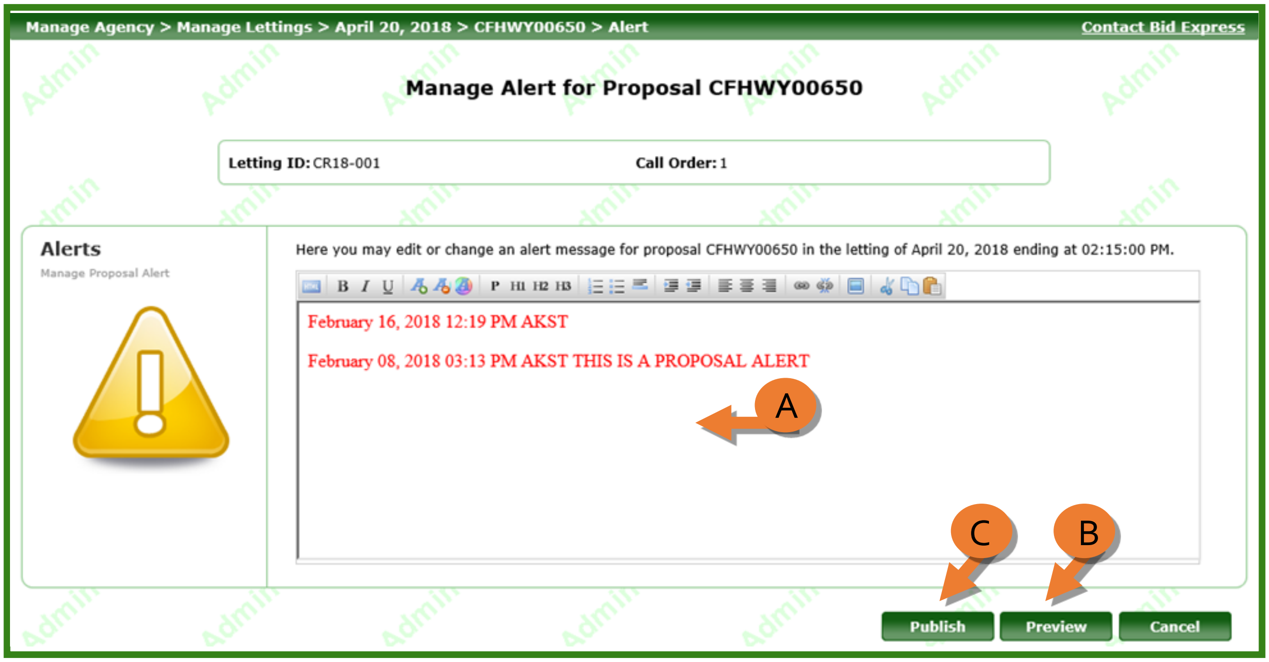


Figure 7.57

A pop up window will appear with the preview (*Figure 7.58*).

11. (C) Close the Preview pop up window and make changes or click **<Publish>** (see *Figure 7.57*). NOTE: You may modify alert information as much as necessary.

Figure 7.58

7.9 Addenda and Notices to Bidders

When the letting is advertised, the **proposal workflow phase** must be changed to **Advertising**. See the Managing Proposal Workflow section earlier in this chapter for instructions. This workflow phase allows Letting Users to create addenda and notices to bidders and make project and proposal level addenda changes. While the proposal is in the Advertising workflow phase, a blue Advertising/Addendum banner will appear at the top of the proposal and associated project screens (*Figure 7.59*).

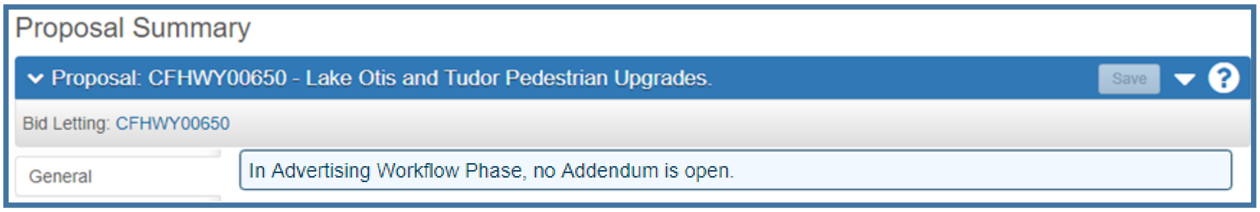


Figure 7.59

After a proposal has been advertised, subsequent changes to proposal information that affect contractor bidding (such as proposal time or items) must be tracked and distributed to bidders. This is accomplished by adding addenda to the proposal. Notices to bidders are created in the addenda area of AWP. The main difference between addenda and notices to bidders in AWP is that addenda require exporting and uploading the addenda ebsx files to Bid Express, whereas notices to bidders do not.

7.10 Creating an Addendum in AWP

Though an addendum can be created by many different people, only those with the Letting User role can create an addendum and make changes to project/proposal information in AWP. An addendum will only be created and any changes made in AWP once all the pieces of the addendum have been gathered and approved/signed. Because each addendum contains different information and may include plans or spec changes (changes outside of the info in AWP Preconstruction), the addenda area of AWP is mainly for creating the cover sheet for the addendum and as a mechanism to update the Bid Express ebsx files. If there are item modifications, see the instructions below.

The Addendum Summary component contains a rolling list of all the addenda and notices to bidders currently recorded for the proposal (*Figure 7.60*). Each row represents one addendum or notice to bidders. You can view information about any addendum in the list, but you can only change information in the most recent addendum. If the most recent addendum has been approved, you cannot change any information in the record.

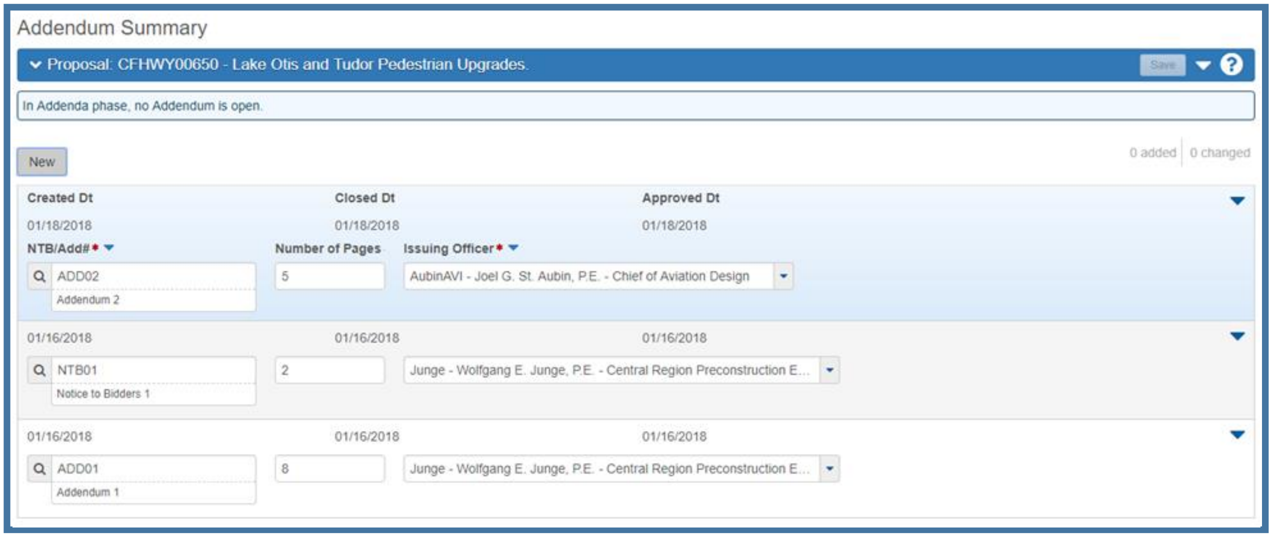


Figure 7.60

To add an addendum:

1. Make sure your addendum documents are compiled and the addendum has been approved/signed. Once an addendum has been approved in AWP it cannot be modified.
2. Make sure your proposal workflow is set to Advertising (the blue notification banner should appear on the proposal and associated project screens).
3. On the Proposal Summary component, click the **Addenda** quick link on top (*Figure 7.61*).

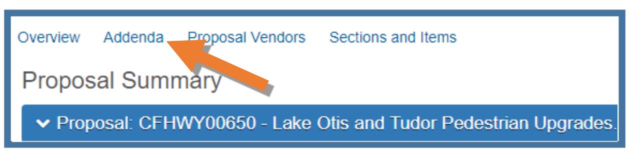


Figure 7.61

(*Figure 7.62*)
NOTE: For your first addendum/NTB, you can begin entering your information into the Addendum/NTB row that is already there. To add additional Addenda or NTBs, first click the **<New>** button.

4. (A) In the **Add/NTB** field, search for and select **Addendum 1** (or whichever is appropriate).
5. (B) In the **Number of Pages** field, enter the total number of pages of the addendum.
6. (C) From the **Issuing Officer** dropdown, select the appropriate issuing officer for the addendum.
   NOTE: If the Issuing Officer dropdown list needs to be updated, please let a Module Administrator know.
7. (D) Click **<Save>**.

Figure 7.62

8. (E) Expand the Addendum Summary component **action menu** (*Figure 7.63*).
9. (F) Select **Open**.

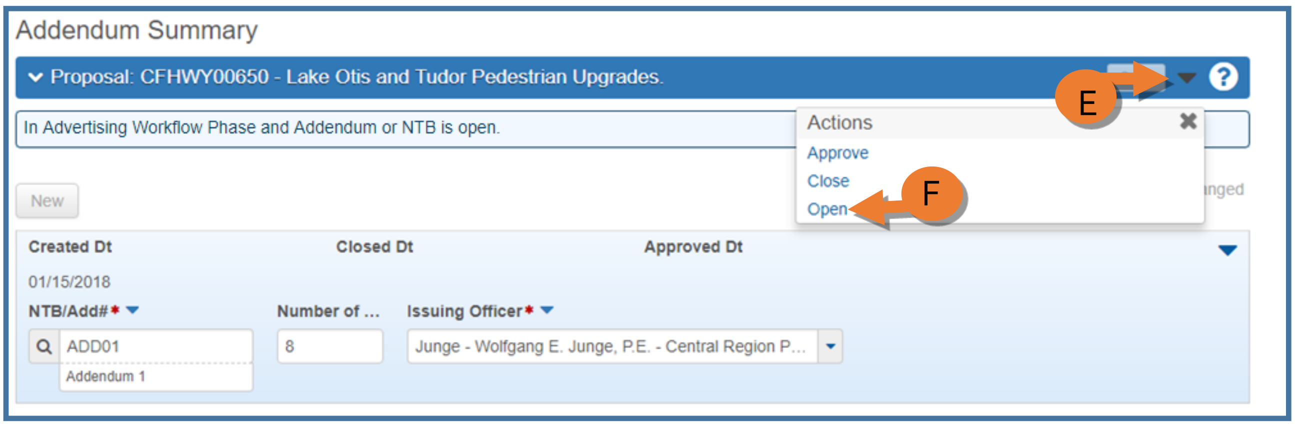


Figure 7.63

A green message bar will appear letting you know an addendum is open (*Figure 7.64*).

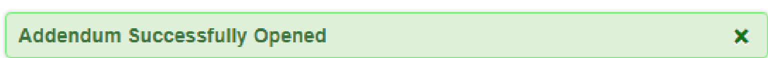


Figure 7.64

When an addendum is open, AWP tracks any changes made to the proposal or associated project(s).

7.11 Modifying General Project or Proposal Information via Addendum

If the addendum is modifying general Project or Proposal information such as Description of Work/Scope, reference chapters three (3) and five (5) for guidance.

7.12 Adding, Deleting, or Modifying Items via Addendum

To access project items:

NOTE: Items cannot be modified or added in the Item Worksheet during Advertising phase.

1. Navigate to the Proposal Summary component for your proposal while in Advertising mode (the blue notification banner should appear).
2. (A) Select the **Projects** tab (*Figure 7.65*).
3. (B) Click the **Project** link.

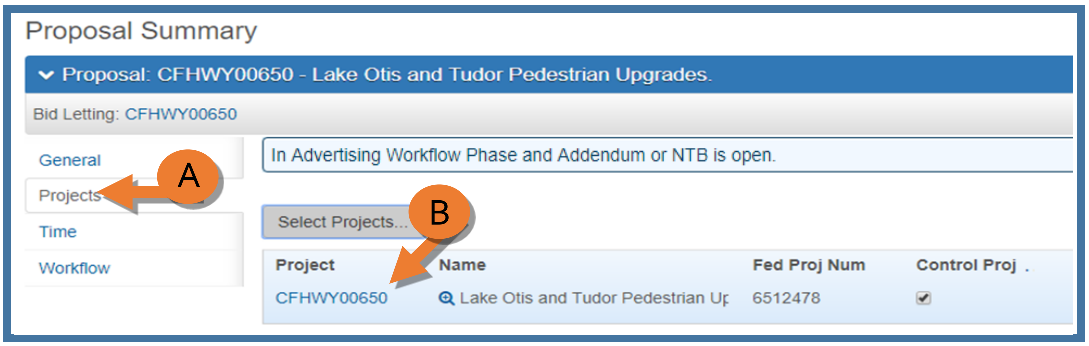


Figure 7.65

4. On the Project Summary component, click the **Categories and Items** quick link (*Figure 7.66*).

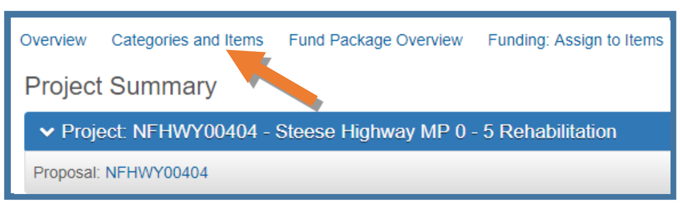


Figure 7.66

5. Select the **Items** tab (*Figure 7.67*).

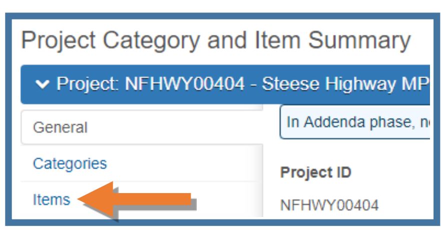


Figure 7.67

To modify an item (*Figure 7.68*):

6. Click the **Expand/Collapse** arrow for the item you want to modify.
7. Make any necessary changes (see Chapter 3 for more info on Project Items)
8. Repeat for all items that require modification.
9. Click **<Save>**.

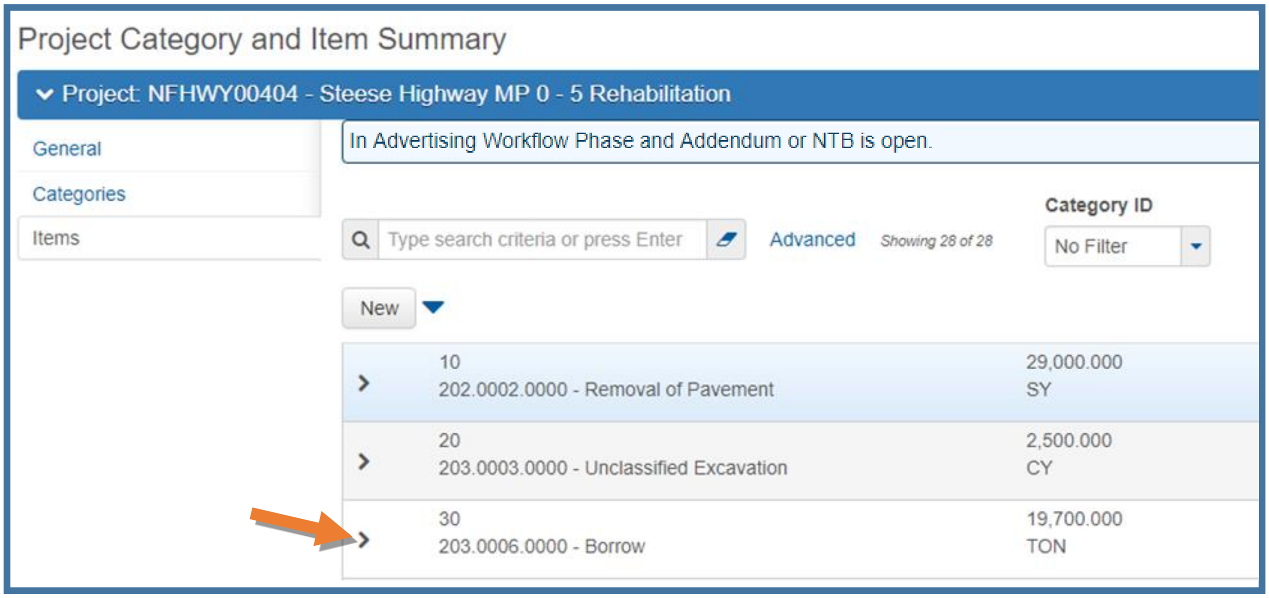


Figure 7.68

To add a new item:

1. Click the **<New>** button (*Figure 7.69*).

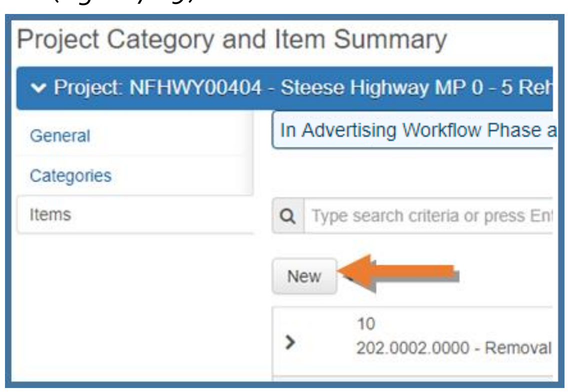


Figure 7.69

(*Figure 7.70*)

2. (A) In the **Item ID** field, search for and select the item you want to add.
3. (B) In the Quantity field, enter the estimated quantity for the addendum item.
4. (C) In the Project Item Unit Price field, enter the estimated unit price for the addendum item.

5. (D) From the Category ID dropdown, select the category to which the addendum item should be assigned.
6. (E) In the **Proposal Line Number** field, type the appropriate proposal line number.
   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 Schedule report (from Global Reports) to identify the correct proposal line number to enter. (See chapter 10 for guidance on running the Bid Schedule report.)
7. Click **<Save>**.

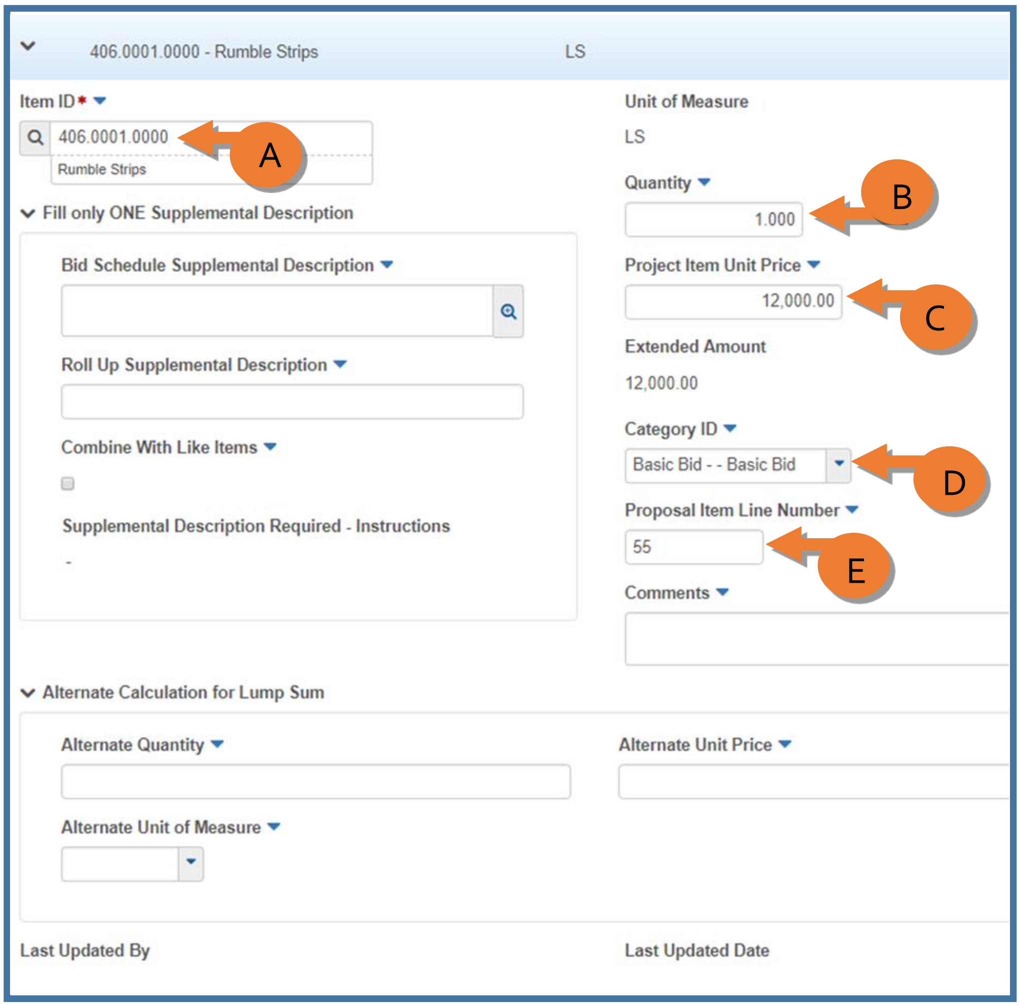


Figure 7.70

If your new item needs its own Fund Package (it has special funding different than the current funding set up for items) click the **Fund Package Overview** quick link on the Project Summary component (*Figure 7.71*) and see chapter 4 for guidance in creating fund packages.

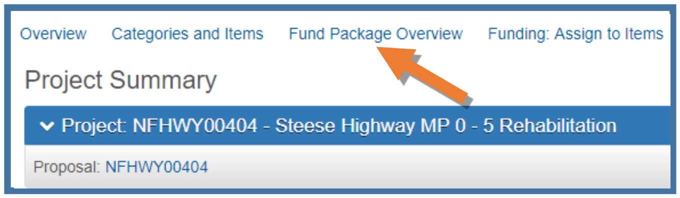


Figure 7.71

If your item is to be assigned to a current fund package:

8. On the top of the Items page, click the **Funding: Assign to Items** quick link (*Figure 7.72*).

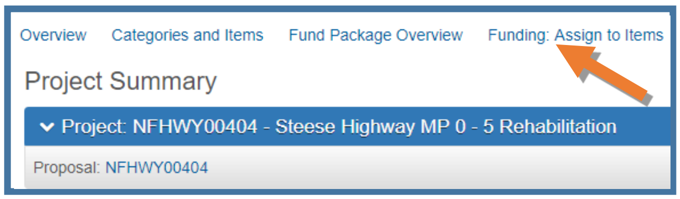


Figure 7.72

NOTES:

- The new item will appear at the bottom of the list. Though you assigned it a Proposal Line Number to make sure it appears in the correct order in the Bid Schedule, the system assigns the next project number. Project items being out of order doesn't matter.
- For more information about assigning fund packages to items, see chapter 4.

9. Select the radio button associated with the correct fund package.
10. Click **<Save>**.

To delete an item (*Figure 7.73*):

1. On the Project Summary component, (A) click the **Items** tab.
2. (B) Expand the item row **action menu**.
3. (C) Select **Delete**.
4. (D) The item record is marked for deletion and users may "undo"  the action until the user clicks **<Save>**.

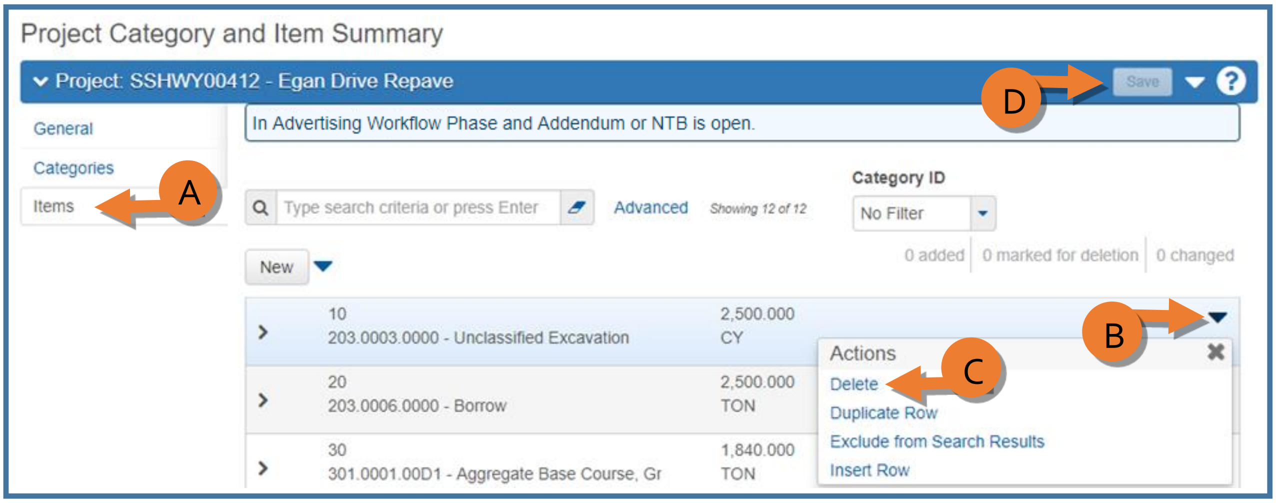


Figure 7.73

Once you have completed all addendum item modifications/additions, you must regenerate your proposal sections and items.

From the Project Category and Item Summary component Items tab, you can navigate to the Proposal Summary two ways:

<u>Option 1:</u>
From your project items page, click the **Previous dropdown** and select the **Proposal Summary** for the proposal you are updating (*Figure 7.74*).

Figure 7.74

<u>Option 2:</u>
From the Funding Assignment component, click the Project quick link (*Figure 7.75*). In the Project Summary component, click the Proposal hypertext link (*Figure 7.76*).

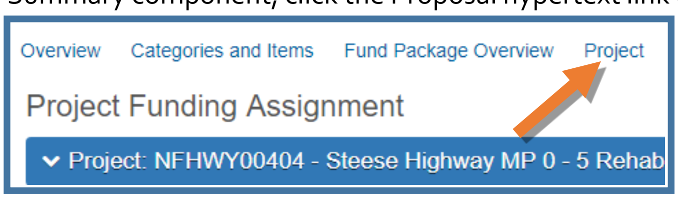


Figure 7.75

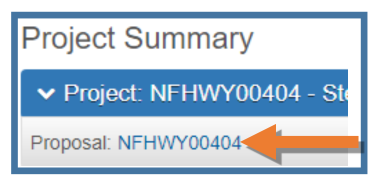


Figure 7.76

On the Proposal Summary component, click the Sections and Items quick link (*Figure 7.77*).

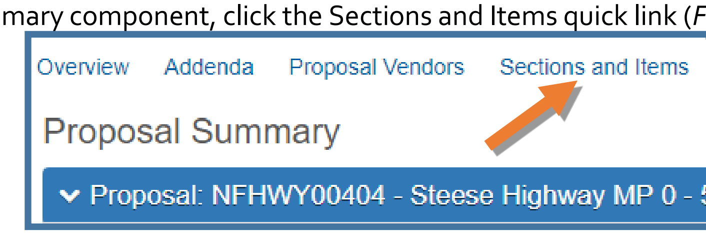


Figure 7.77

(*Figure 7.78*)

1. (A) Expand the component **action menu.**
2. (B) Select **Assign Items to Sections**.

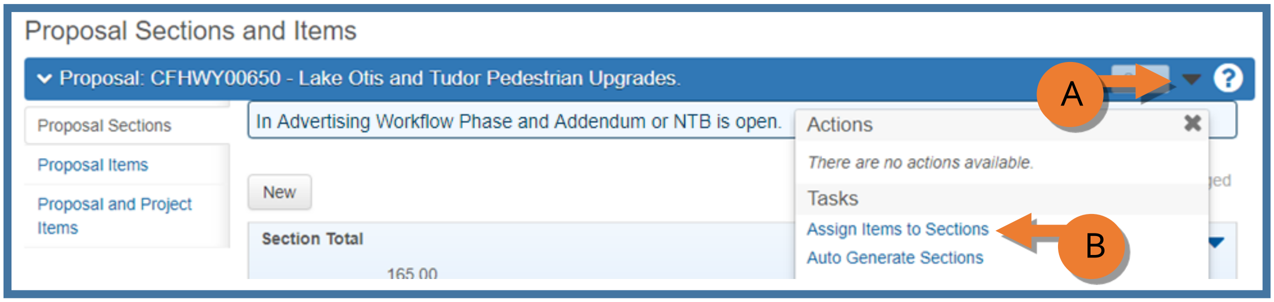


Figure 7.78

Notice in the window to the right side of the screen that Section(s) have been assigned to letter(s) (*Figure 7.79*). Also notice that it is still referencing Project Line numbers, so the new item appears at the bottom.

3. (C) Click the **Expand/Collapse** arrow for the category you just updated.
4. (D) For the new item, click the radio button to assign the item to the appropriate section.
5. (E) Click **<Save>**.

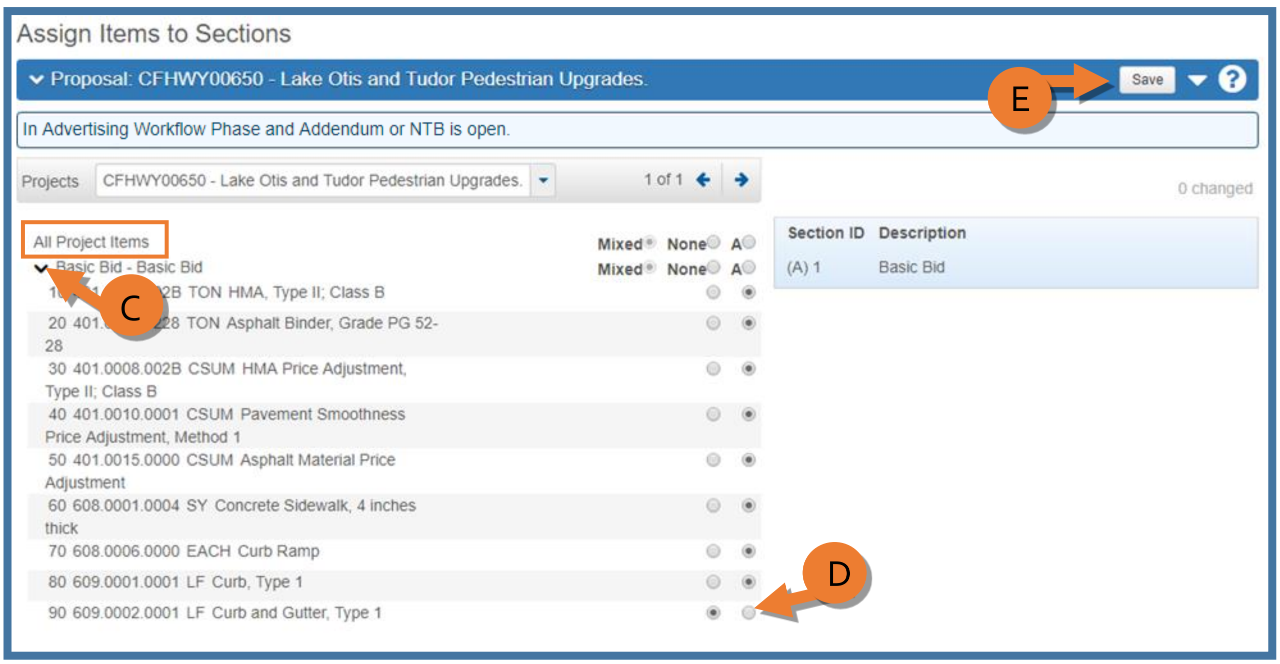


Figure 7.79

7.13 Postponing a Letting via Addendum in AWP

To postpone a letting in AWP via Addendum:

Before completing the following steps, **create and open your AWP Addendum per the previous sections.*

1. Navigate to the Bid Letting Summary component for the letting you want to postpone (*Figure 7.80*).
2. (A) Expand the component action menu.
3. (B) Select **Add New**.

Figure 7.80

The Quick Add Bid Letting component will appear (*Figure 7.81*).

4. (C) In the **Letting ID** field, enter the old letting ID and add _1 on the end (i.e. NFHWY00404_1).
5. (D) In the **Letting Date** field, click the **calendar icon** and select the new letting date.
6. (E) In the **Letting Status** field, select **Scheduled** from the dropdown
7. (F) Click **<Save>**.

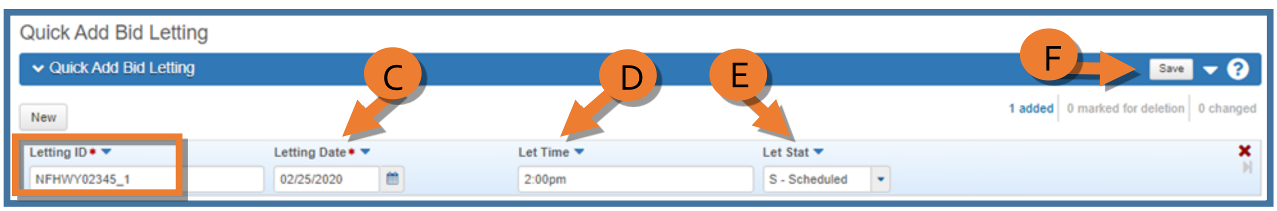


Figure 7.81

8. From the **Previous dropdown**, go back to the Bid Letting Summary for the letting you are postponing (*Figure 7.82*).

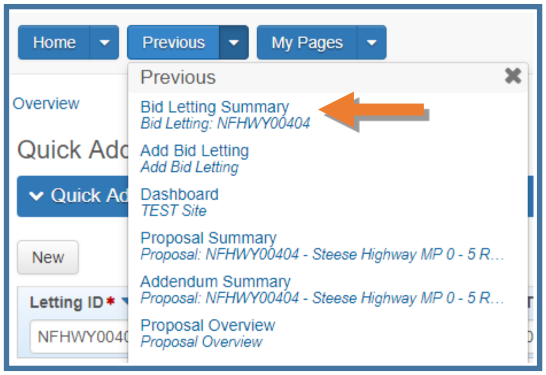


Figure 7.82

9. (G) From the Bid Letting Summary component, click on the **Proposals** tab (*Figure 7.83*)
10. (H) Expand the proposal row **action menu**.
11. (I) Select **Postpone**.

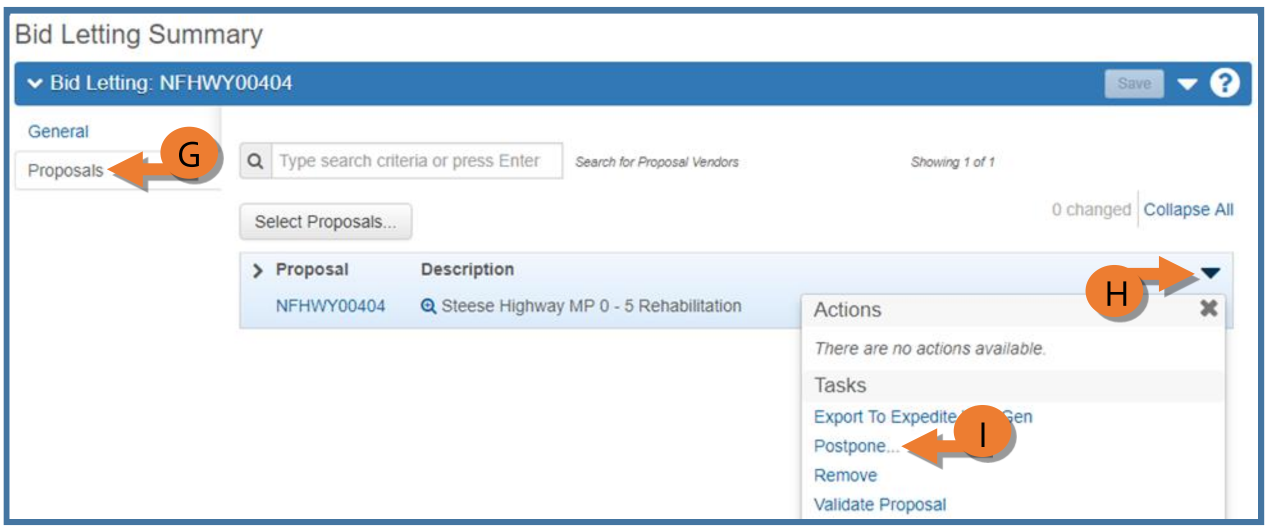


Figure 7.83

12. (J) Search for the new letting you just created (*Figure 7.84*).
13. (K) Select the new letting ID. The selected letting will have a green checkmark next to it.
14. (L) Click the **<Postpone>** button.

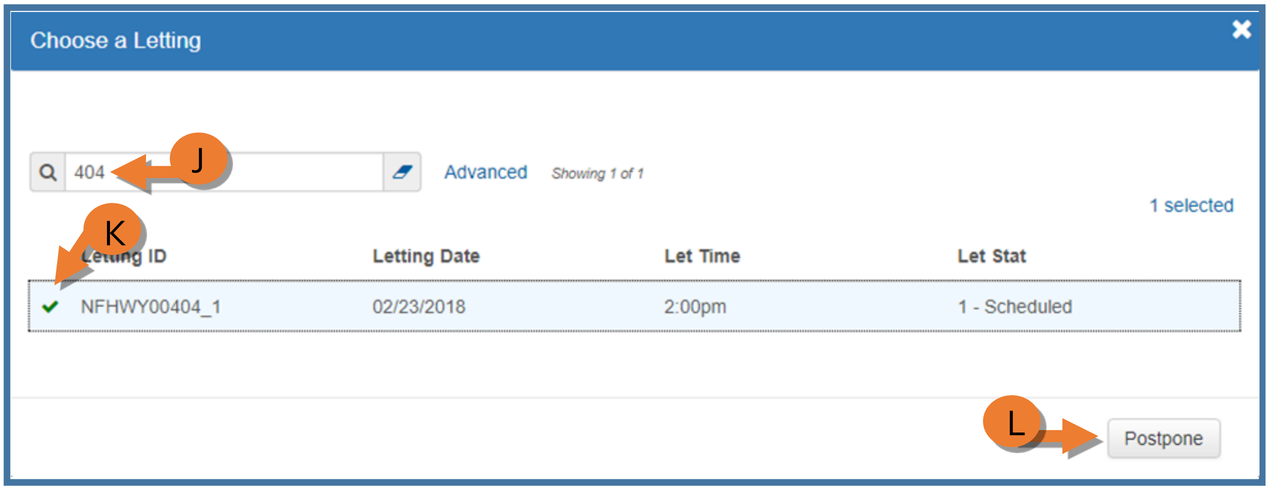


Figure 7.84

A green message bar will appear letting you know the postponement was successful and the proposal will disappear from this letting (*Figure 7.85*).

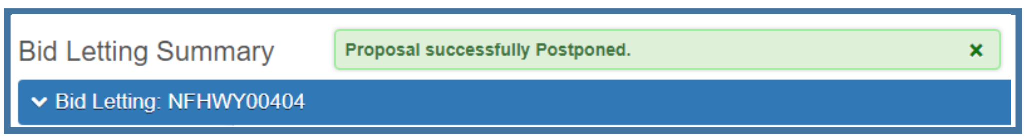


Figure 7.85

15. (M) Click the **General** tab (*Figure 7.86*).
16. (N) From the **Letting Status** dropdown, change the status to **Re-scheduled**.
17. (O) Click **<Save>**.

Figure 7.86

Your new letting has been created and your proposal associated with it.

Approve and Finalize your Addendum per the next sections. Once that is complete and you have your Addendum PDF compiled and your addendum ebsx file and new zip file, you will postpone the letting in Bid Express.

7.14 Approving / Deleting an Addendum in AWP

Once all addendum changes have been made in AWP, check the changes by running the Addenda Detail report. The Proposal Addenda Detail report itemizes all the changes made when an addendum is open. Once you have reviewed all the changes, you can approve the addendum.

*****Before approving the addendum, revalidate your proposal*****

Generating the Proposal Addenda Detail report:

1. Navigate back to the Bid Letting Summary.
2. (A) From the Bid Letting Summary component, select the **Proposals** tab (*Figure 7.87*).
3. (B) Click the **Proposal** link

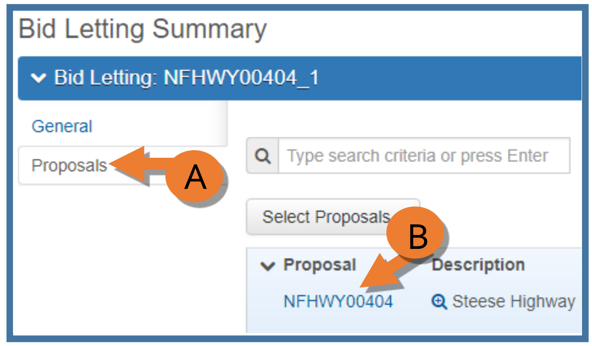


Figure 7.87

4. (C) Expand the Proposal Summary component **action menu** (*Figure 7.88*)
5. (D) Select **Addendum/Notice to Bidders Detail** report.

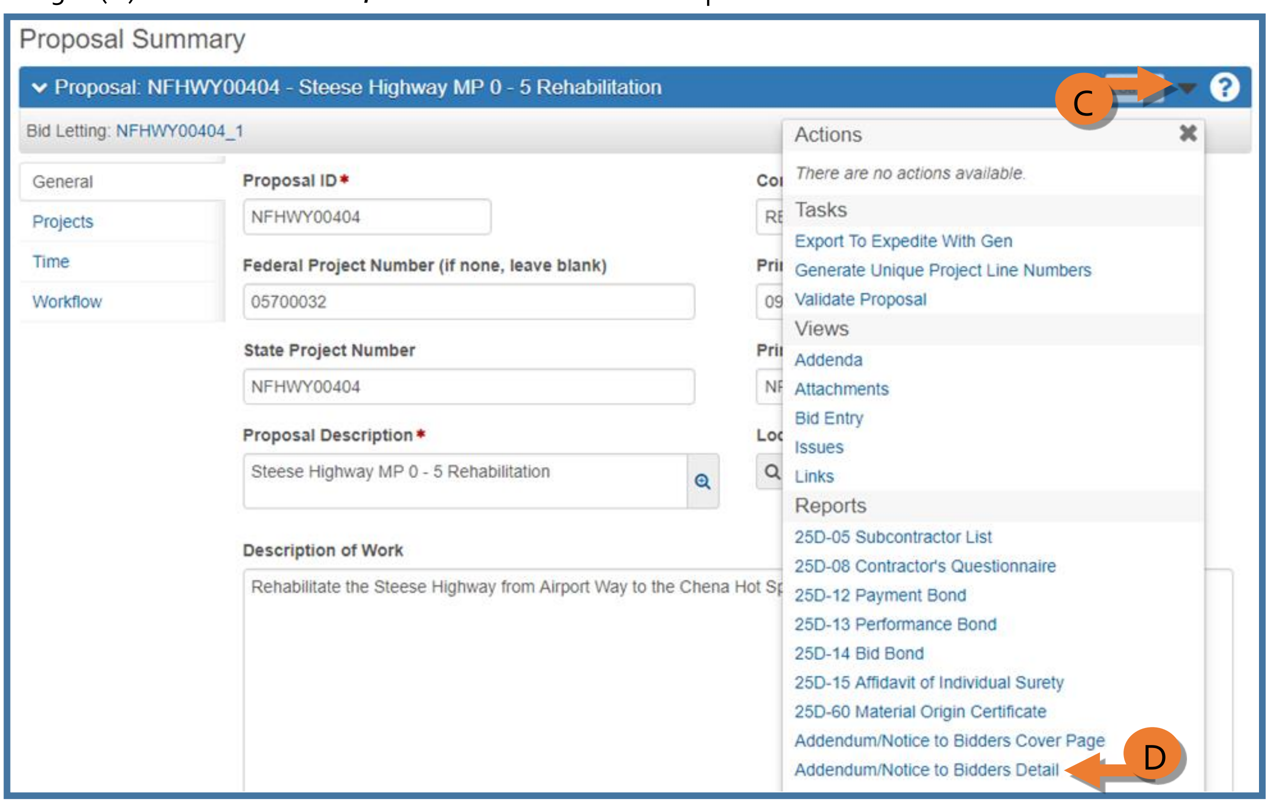


Figure 7.88

6. (E) Click **<Execute>** (*Figure 7.89*).

Figure 7.89

To approve an addendum:

NOTE: You do not need to Close an addendum. When you Approve, it automatically closes it.

1. Return to the Addenda Summary component. You can do this by navigating back to the Proposal Summary component (from the Previous button dropdown) and clicking the **Addenda** quick link (see *Figure 7.61*)
2. (A) Expand the component **action menu** (*Figure 7.90*)
3. (B) Select **Approve**.

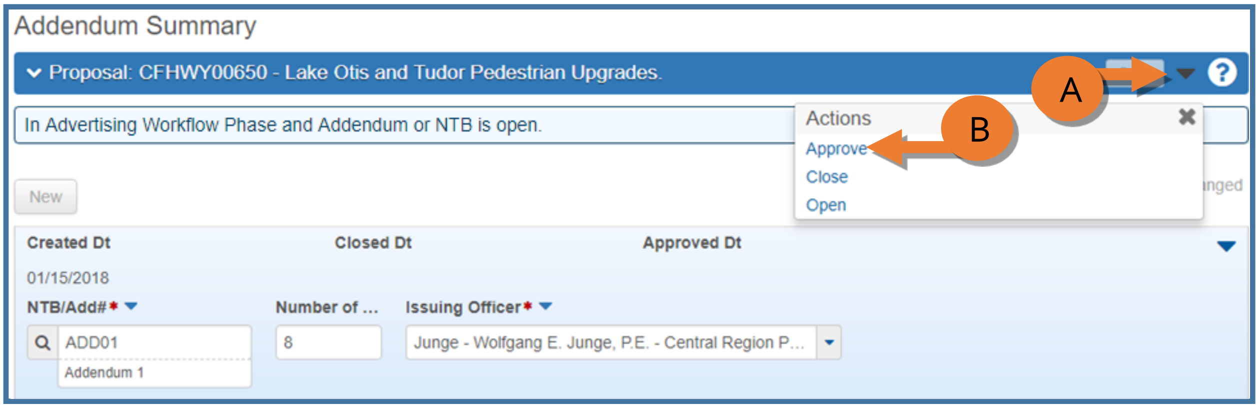


Figure 7.90

You will see a green message bar confirming the addendum has been approved (*Figure 7.91*)

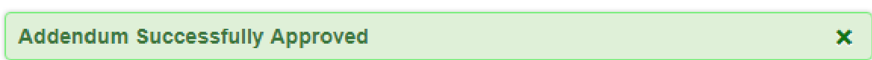


Figure 7.91

To delete an addendum:

> NOTE: You can only delete the most recent addendum or NTB, regardless of whether it is open, closed, or approved. When you delete an addendum, the system resets all proposal and project information to the values that existed before the addendum was added.

1. (A) On the Addendum Summary component, expand the **action menu** (*Figure 7.92*)
2. (B) Select **Delete Latest**.

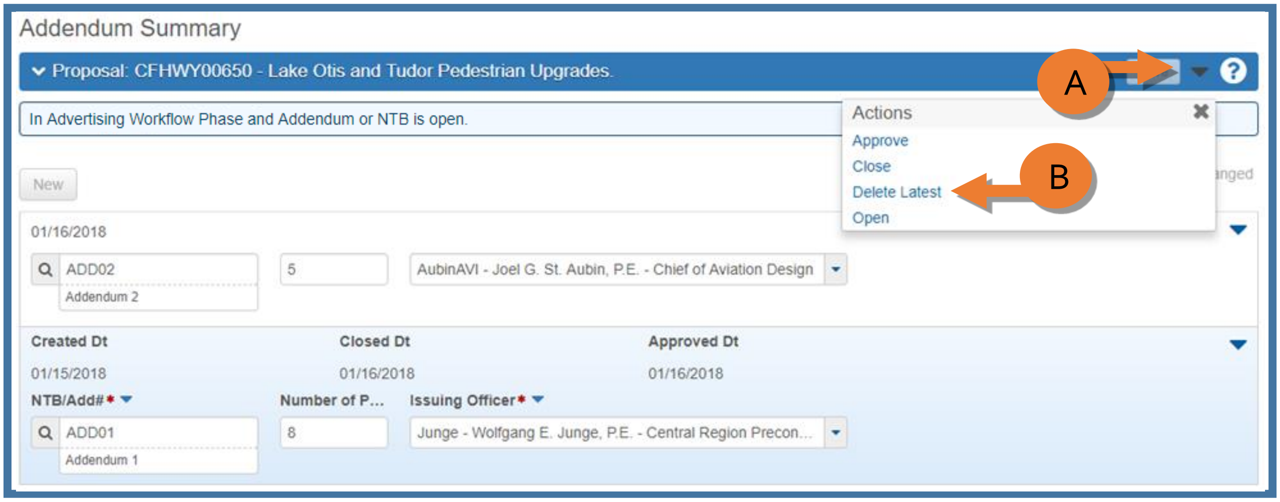


Figure 7.92

You will see a green message bar confirming the addendum has been deleted (*Figure 7.93*)

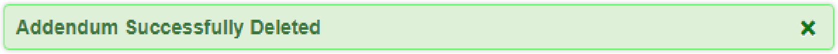


Figure 7.93

7.15 Final Addendum Processing

Generate the Addendum cover page (this is the cover page for your addendum packet):

1. Navigate to the Proposal Summary component. You can click the **Proposal** quick link at the top of the Addenda Summary component page.
   (*Figure 7.94*)
2. (A) Expand the component **action menu**.
3. (B) Select **Addendum/Notice to Bidders Cover Page** report.

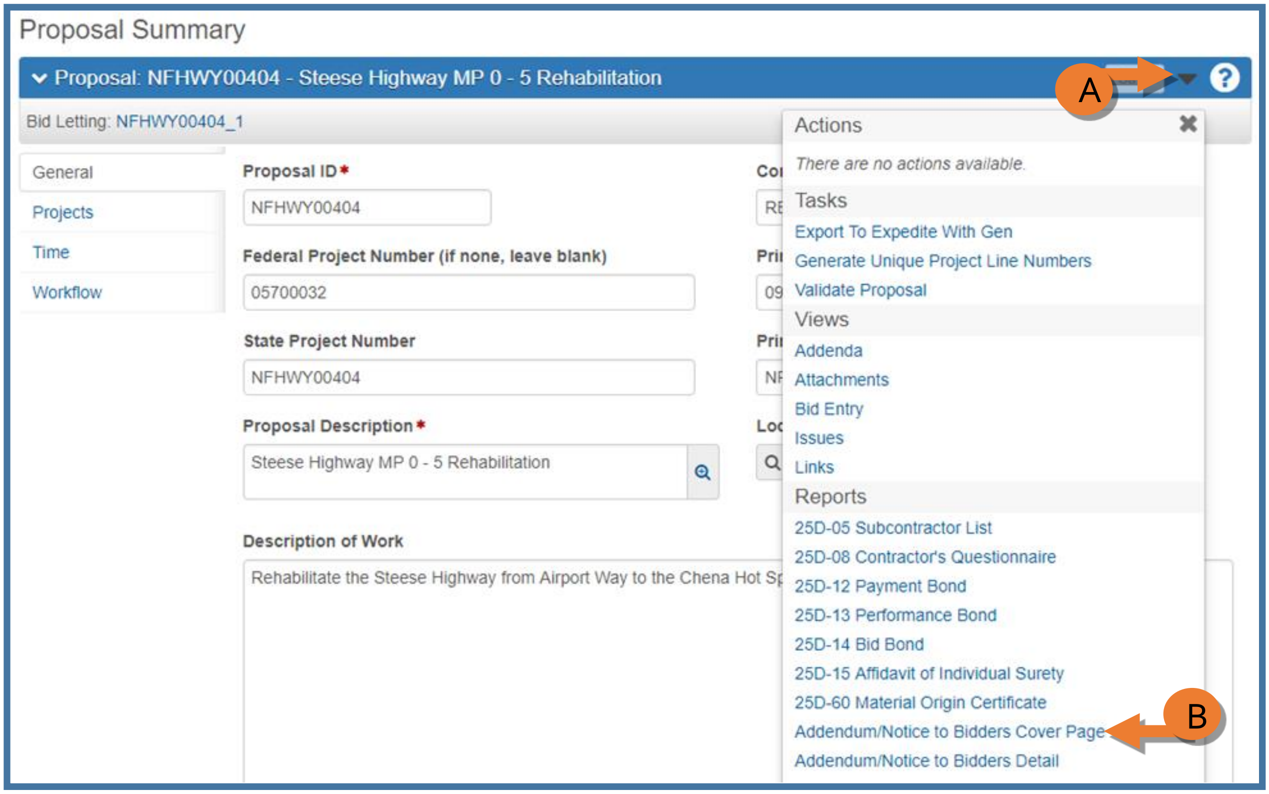


Figure 7.94

   (*Figure 7.95*)

4. (C) From the **Addenda Number** dropdown, select the Addendum you want to run the report for.
5. (D) Click **<Execute>**.

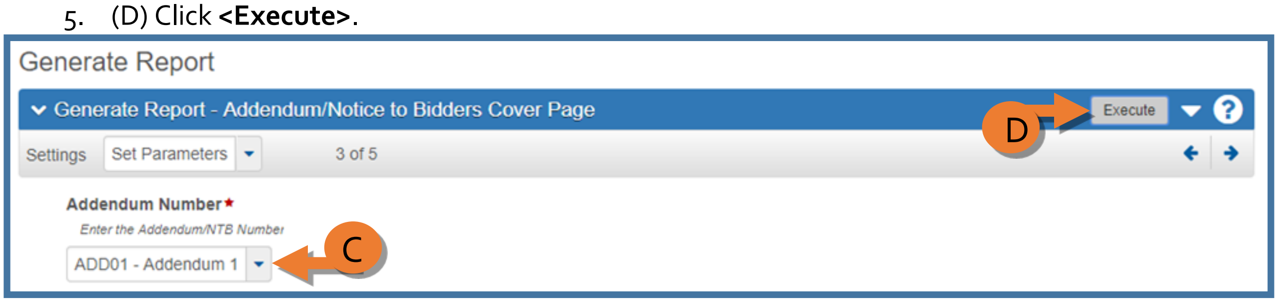


Figure 7.95

Generate the addendum ebsx file and addendum ebsx zip file to be uploaded to Bid Express. Follow the same steps as the ***Exporting the Proposal for Use with AWP Bids*** section.

Notice that the ebsx file now has .001x after it instead of ebsx (*Figure 7.96*). This indicates addendum file 001. Every subsequent addendum will be .002x, .003x, etc.

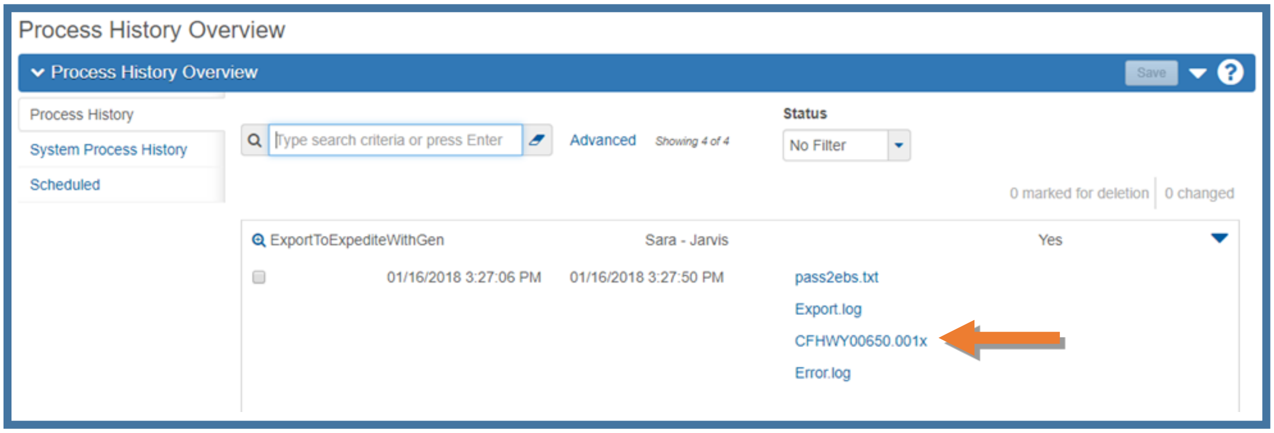


Figure 7.96

1. Right click on the addendum link and save to the project folder on the shared drive (see *Figure 7.28* and *Figure 7.29*).
2. Create a zip folder that contains the addendum file (be sure to add zip to the folder name) (see *Figure 7.30* and *Figure 7.31*).

   *If you are postponing a letting via Addendum, skip to the next section ***Postponing a Letting in Bid Express via Addendum***, otherwise, continue.

3. Log into Bid Express (see *Figure 7.32*).
4. Click on the **<Admin>** button on the top right of the screen (see *Figure 7.33*).
5. Upload the addenda .001x ebsx file (different path than uploading original file).
   a. In the AASHTOWare Project Bids container, click the **Upload AASHTOWare Project Bids Files** link (*Figure 7.97*).

Figure 7.97

6. Click the **<Browse>** button (see *Figure 7.40*)
7. Navigate to the proposal folder on your shared drive and (A) select the ebsx addendum file (ends in .001x, .002x, etc) (*Figure 7.98*).
8. (B) Click **<Open>**.

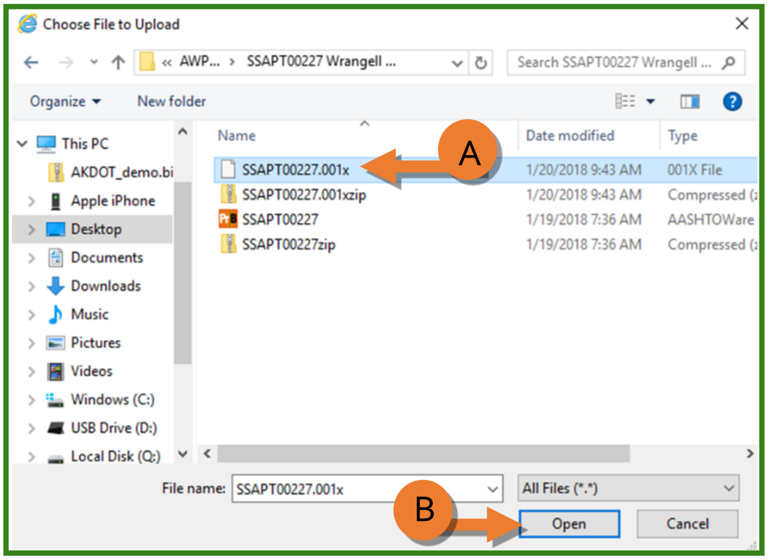


Figure 7.98

9. Click the **<Upload>** button.

A green message bar will appear letting you know the ebsx Amendment file was successfully uploaded (*Figure 7.99*)

10. Click on the blue **Proposal link** in the success message bar to go to the Proposal.

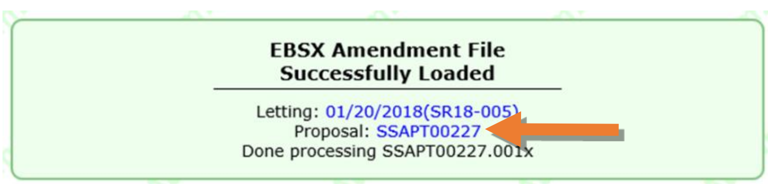


Figure 7.99

Now you can attach the compiled addendum PDF and the new zip file containing the original ebsx and the addendum ebsx file(s).

11. From the proposal page, click the **attachments** link just below the green header bar at the top of the page (*see Figure 7.43*).
    (*Figure 7.100*)
12. (C) Click the **<Choose File>** button.
13. Navigate to the file you want to upload, click **<Open>**.
14. (D) Select the **Bid Forms EBSX** attachment type for your new zip file and the **Addendum** attachment type for your PDF.
15. (E) Click the **<Upload>** button.

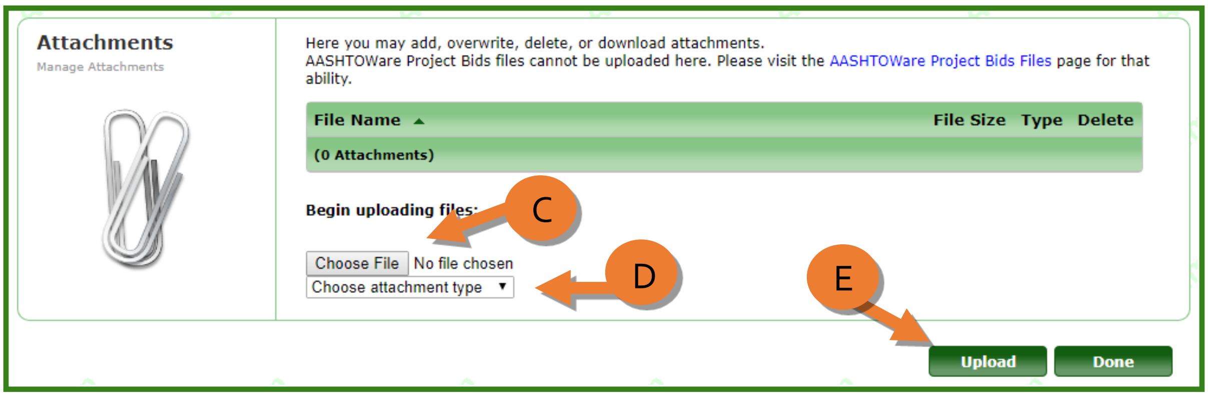


Figure 7.100

7.16 Postponing a Letting in Bid Express via Addendum

1. Log onto Bid Express (see *Figure 7.32*).
2. Click on the **<Admin>** button on the top right of the screen (see *Figure 7.33*).

This brings you to the Manage Agency page. Notice that there is an "Admin" watermark across your screen indicating that you are in administrator mode.

3. In the Letting and Vendor Data section, select **Manage Lettings, Proposals, and Bids** (*Figure 7.101*)

Figure 7.101

This brings you to the Manage Lettings page.

4. Click the **<Create a Letting>** button (*Figure 7.102*).

Figure 7.102

(*Figure 7.103*)

5. (A) In the **Letting ID** field, enter the new AWP Letting ID.
6. (B) Click in the **Letting Date** field. A calendar and time selection area will open. Select the correct date and time of the new letting.
7. (C) Click in the **Opening Date** field. A calendar and time selection area will open. Select the same date and time as the Letting Date field.
8. (D) Click in the **Make Letting Visible On field**. A calendar and time selection area will open. Select the correct date and time to make your new letting visible immediately.
9. (E) In the **District ID** field, enter the region identification. CR, NR, or SR.
10. (F) In the **Description** field, enter the Proposal Name.
11. (G) Click **<Save>**.

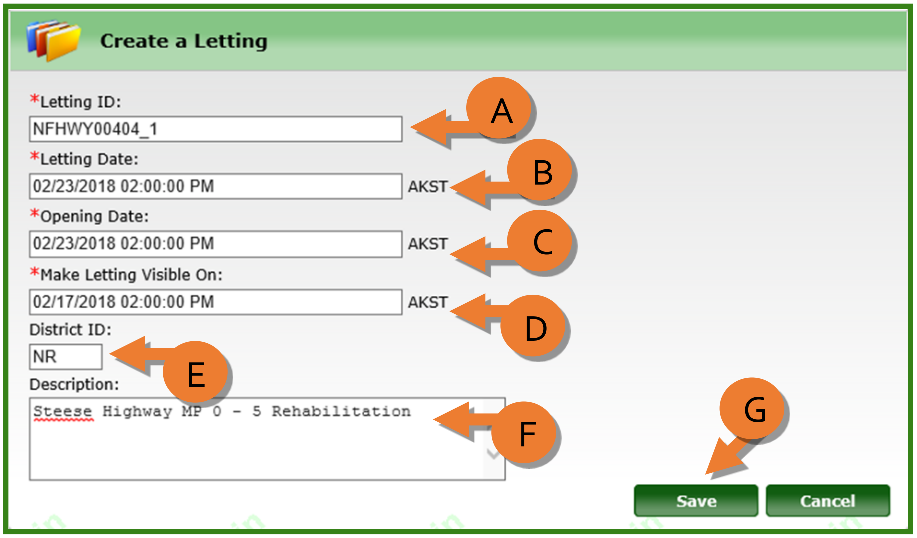


Figure 7.103

You will be returned to the Manage Lettings page and get a green message bar letting you know the letting was successfully created.

Your new letting will appear in the list.

12. Click on the blue **Letting Date link** (*Figure 7.104*).

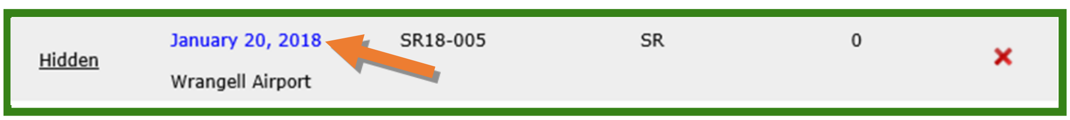


Figure 7.104

13. Click the blue **Upload Bids Files** link to upload the proposal's ebsx addendum file (*Figure 7.105*).

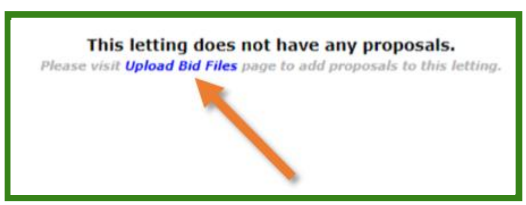


Figure 7.105

14. Click the **<Browse>** button (*Figure 7.106*).

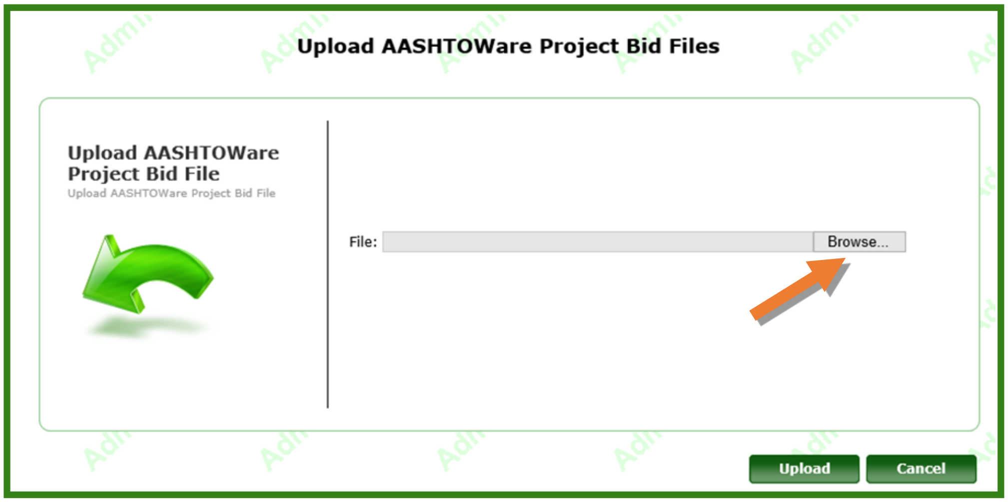


Figure 7.106

15. (H) Navigate to the proposal folder on your shared drive and ***select the ebsx addendum*** file (ends in .001x, .002x, etc) (*Figure 7.107*).
16. (I) Click **<Open>**.

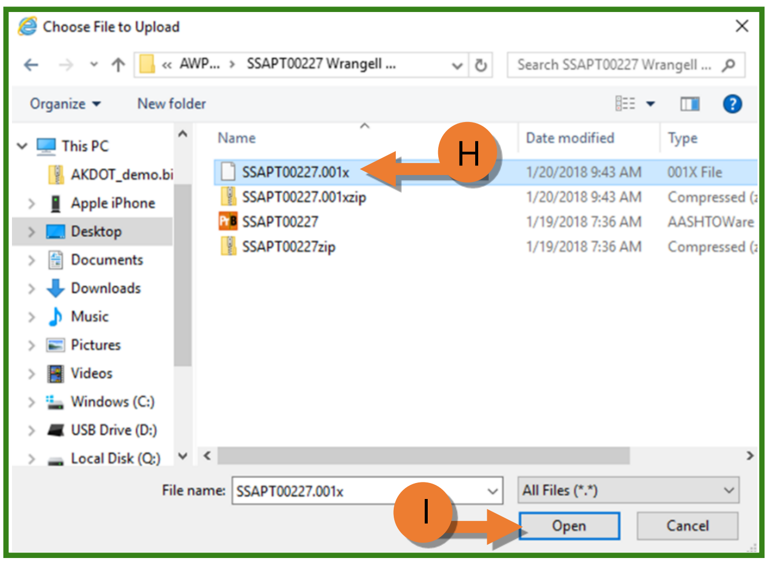


Figure 7.107

17. Click the **<Upload>** button.

A green message bar will appear letting you know the ebsx Amendment file was successfully uploaded (*Figure 7.108*).

18. Click on the blue Proposal link in the success message bar to go to the Proposal.

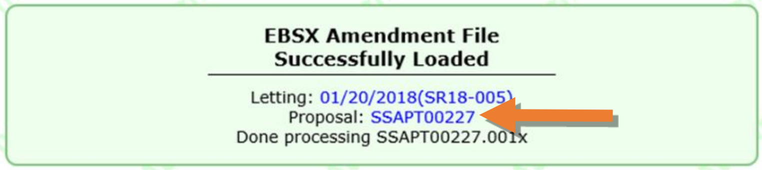


Figure 7.108

Now you can attach the compiled addendum PDF and the new ebsx zip file containing the addendum ebsx file.

From the proposal page, click the **attachments** link just below the green header bar at the top of the page (see *Figure 7.43*).

(*Figure 7.109*)

19. (J) Click the **<Choose File>** button.
20. Navigate to the file you want to upload, click **<Open>**.
21. (K) Select the **Bid Forms EBSX File** attachment type for the zip file and the **Addendum** attachment type for your PDF.
22. (L) Click the **<Upload>** button.

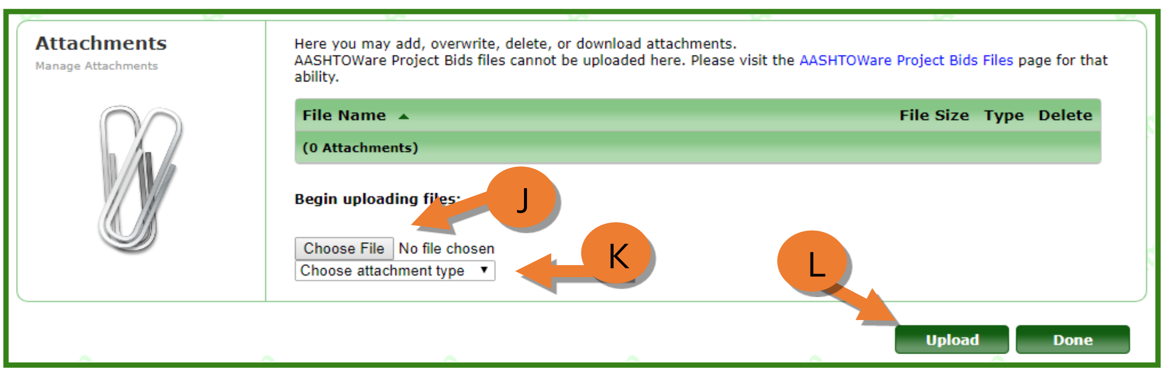


Figure 7.109

If you return to the Manage Lettings area, you can see both the old and new lettings. The old letting no longer has a proposal on it (*Figure 7.110*).

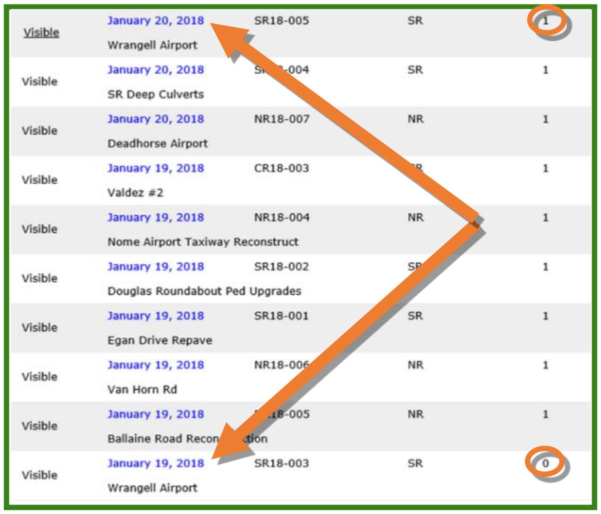


Figure 7.110

If you click on the blue link for the old letting, you will be directed to the new letting for the proposal and can click the blue link to go to the new letting (*Figure 7.111*).

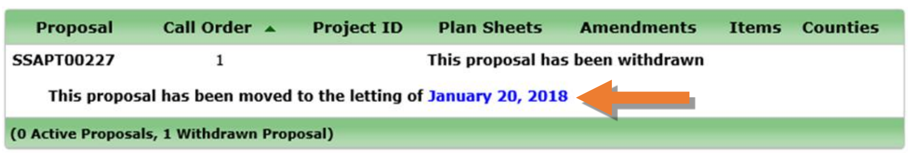


Figure 7.111

7.17 Creating / Issuing a Notice to Bidders

Notices to Bidders (NTB) are created in the AWP Addenda area and follow the same basic process in AWP.

To create a Notice to Bidders:

1. Create a word doc or other file with the actual Notice to Bidders information.
2. Navigate to the Proposal Summary component for the proposal you want to issue an NTB for.
3. Click the **Addenda** quick link on top of the page (see *Figure 7.61*).
   (*Figure 7.112*).
   NOTE: For your first addendum/NTB, you can begin entering your information into the Addendum/NTB row that is already there. To add additional Addenda or NTBs, first click the **<New>** button.
4. (A) In the **Add/NTB** field, search for and select **Notice to Bidders 1** (or whichever is appropriate).
5. (B) In the **Number of Pages** field, enter the total number of pages of the notice to bidders.
6. (C) From the **Issuing Officer** dropdown, select the appropriate issuing officer for the notice.
   NOTE: If the Issuing Officer dropdown list needs to be updated, please let a Module Administrator know.
7. (D) Click **<Save>**.

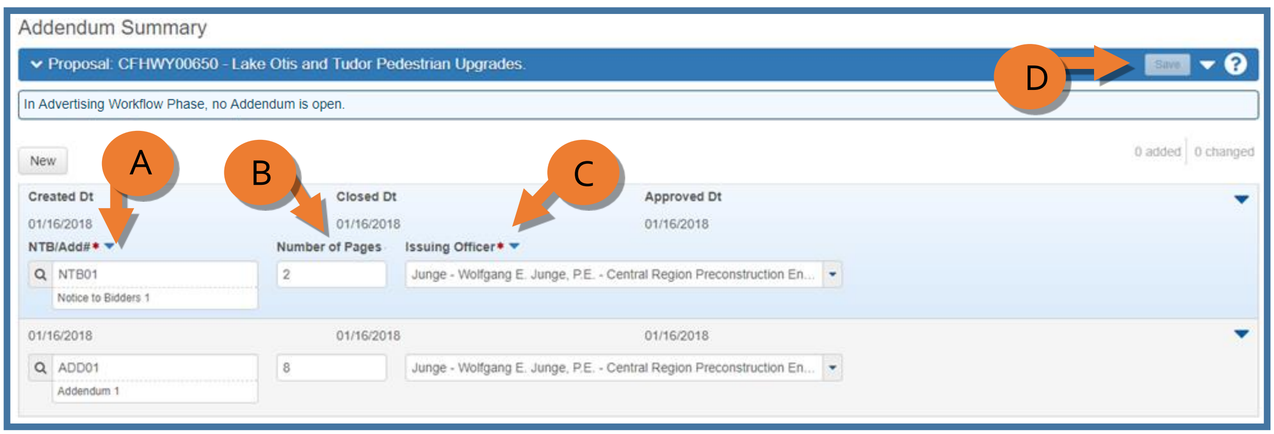


Figure 7.112

8. Expand the Addendum Summary component **action menu** and select **Approve** (see *Figure 7.90*).
   NOTE: There is no need to open an NTB like is necessary with an addendum.

Generate the Notice to Bidders cover page:

9. Navigate to the Proposal Summary component. You can click the **Proposal** quick link at the top of the Addenda Summary component page (*Figure 7.113*).

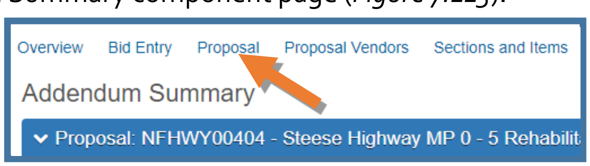


Figure 7.113

10. Expand the component **action menu** and select **Addendum/Notice to Bidders Cover Page** report.
11. (A) From the **Addenda Number** dropdown, select the Notice to Bidders you want to run the report for (*Figure 7.114*).
12. (B) Click **<Execute>**.

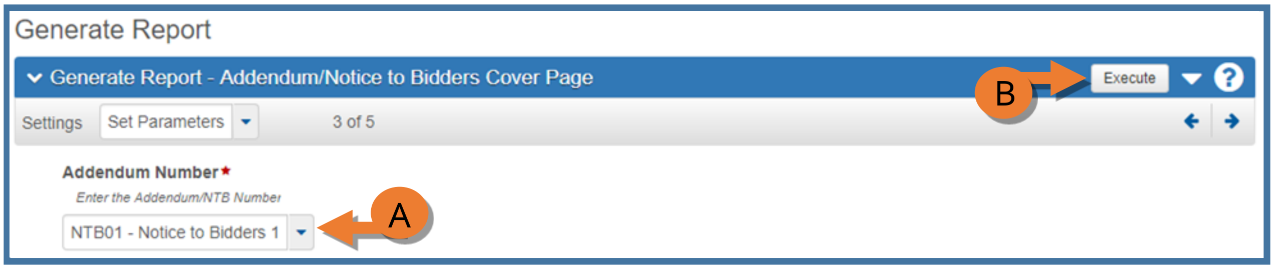


Figure 7.114

This is the cover page for your Notice to Bidders packet.

Attach the NTB PDF file to the proposal in Bid Express.

1. Log into Bid Express (see *Figure 7.32*).
2. Navigate to the **Lettings** tab.
3. Click the blue **Letting Date link** for your letting (*Figure 7.115*).

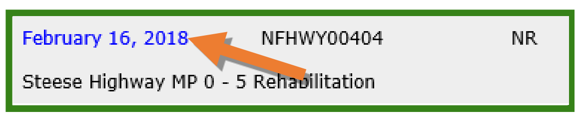


Figure 7.115

4. Click the blue **Proposal link** (*Figure 7.116*).

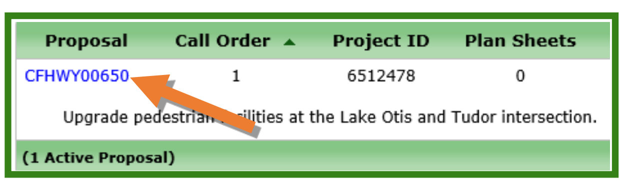


Figure 7.116

5. From the proposal page, click the **attachments** link just below the green header bar at the top of the page (*see Figure 7.43*).
   (*Figure 7.117*)
6. (C) Click the **<Choose File>** button.
7. Navigate to the file you want to upload, click **<Open>**.
8. (D) Select the **Notice to Bidders** attachment type.
9. (E) Click the **<Upload>** button.

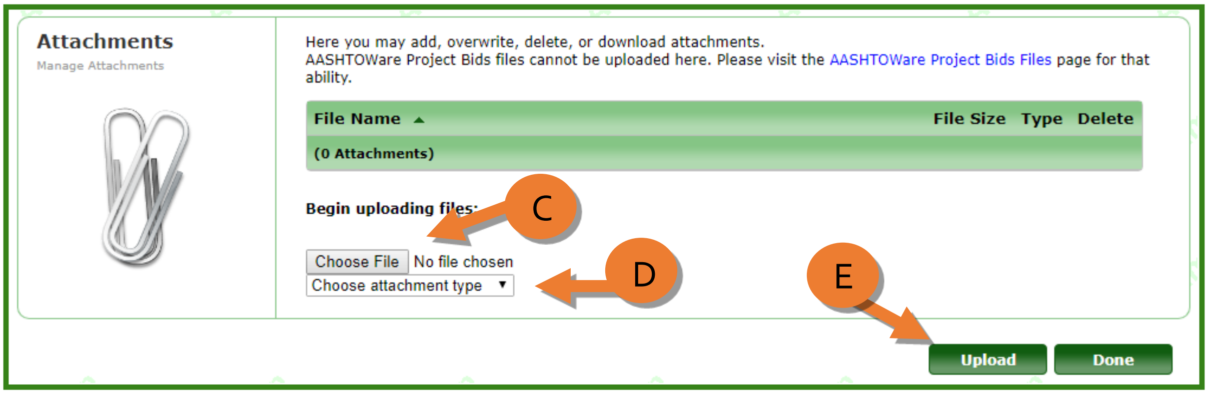

Attachments
Manage Attachments
Here you may add, overwrite, delete, or download attachments.
AASHTOWare Project Bids files cannot be uploaded here. Please visit the AASHTOWare Project Bids Files page for that ability.
File Name
File Size
Type
Delete
(0 Attachments)
Begin uploading files:
C
Choose File
No file chosen
Choose attachment type
D
E
Upload
Done

Figure 7.117

7.18 Postponing a Letting via Notice to Bidders

If you need to quickly postpone a letting by NTB, which will then be postponed officially by Addendum, please follow these steps:

1. Create the NTB document, including your NTB Cover page (see previous section).
2. Log into Bid Express.
3. Click the **Admin** button at the top right of the screen (*Figure 7.118*).

Figure 7.118

4. In the Letting and Vendor Data section, select **Manage Lettings, Proposals, and Bids** (*Figure 7.119*).

Figure 7.119

5. Click the blue **Letting Date** link for the letting you want to postpone by NTB.
6. Click the **Edit Letting** link below the green header bar at the top of the page (*Figure 7.120*).

Figure 7.120

(*Figure 7.121*)

7. (A) Adjust your **Letting Time**.
8. (B) Click in the **Opening Date** field. A calendar and time selection area will open. Select the same date and time as the Letting Date field.
9. (C) In the **Comments** box, add a comment. NOTE: This comment is not visible to contractors.
10. (D) Click **<Save>**.

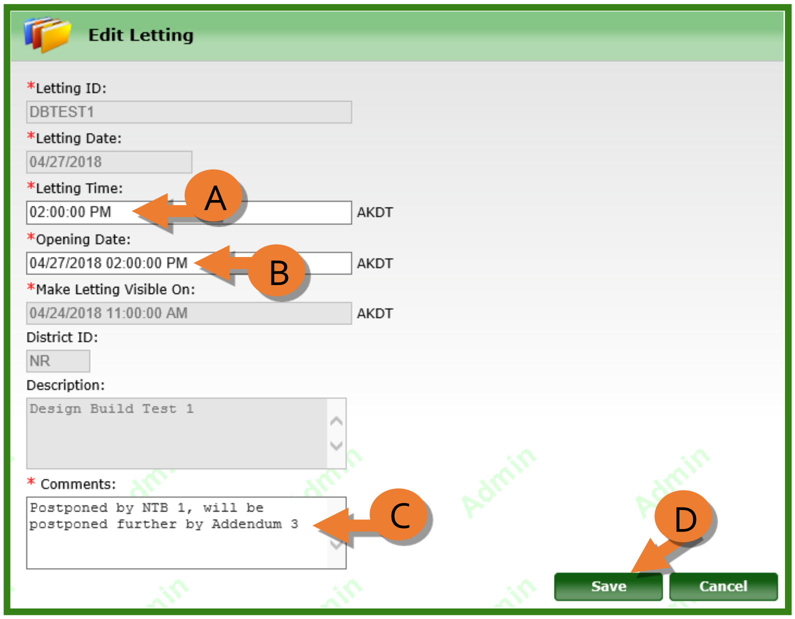


Figure 7.121

11. Attach your NTB PDF document to the Bid Express proposal.

7.19 Notify Plan Holders of Addendum or Notice to Bidders

Once you have issued the Addendum or Notice to Bidders, notify the Plan Holders. AWP will send an automated email out notifying Plan Holders of the amendment.

1. Navigate to the Proposal Summary component **General** tab for your proposal.
2. In the **Proposal Process Notifications** dropdown, select **Notify Plan Holders**.
3. Click **<Save>**.

7.20 Cancelling a Solicitation

Before a bid opening occurs, it may be necessary to cancel the solicitation.

First, you must change the Proposal Workflow phase to Award Processing.

1. Log into AWP (see chapter 1).
2. Make sure you are in the ***Letting User*** role.
3. Navigate to Proposal Overview on the dashboard (*Figure 7.122*).
4. (A) Search for and (B) select your proposal.

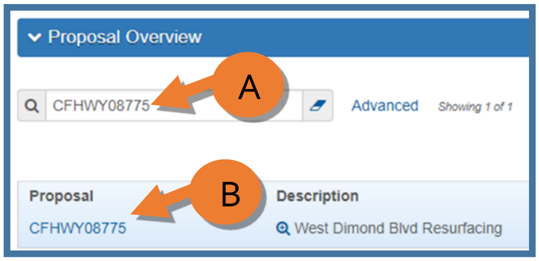


Figure 7.122

(*Figure 7.123*)

5. (C) Navigate to the **Workflow** tab on the Proposal Summary component.
6. (D) From the **Workflow Phase** dropdown, select **Award Processing**.
7. (E) Click **<Save>**.
8. (F) Navigate to the Bid Letting Summary component by clicking the **Bid Letting hyperlink**.

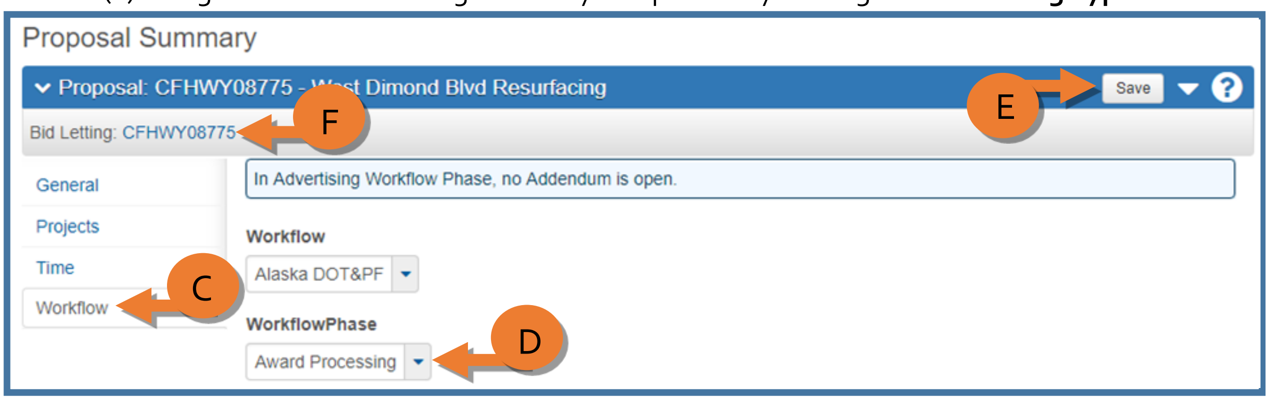


Figure 7.123

9. In the Award container on the Bid Letting Summary component, (G) enter the date the solicitation was cancelled in the **Letter of Award Date** field (*Figure 7.124*).

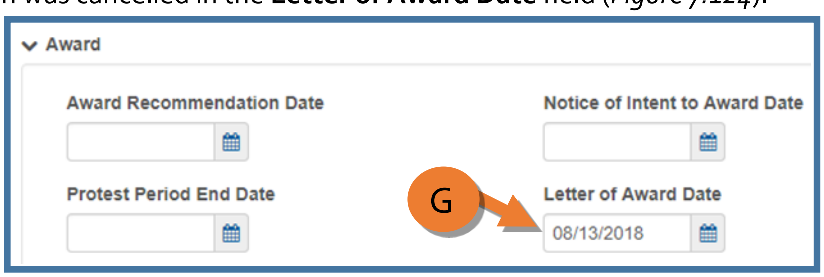


Figure 7.124

10. Click **<Save>**.
11. On the top of the Bid Letting Summary component page, click the **Status** quicklink (*Figure 7.125*).

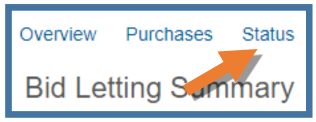


Figure 7.125

(*Figure 7.126*)

12. On the Bid Letting Status component, (H) change the **Letting Status** field to **Solicitation Cancelled**.
13. (I) Click **<Save>**.
14. (J) Expand the Proposal row **action menu**.
15. (K) Click **Reject**.

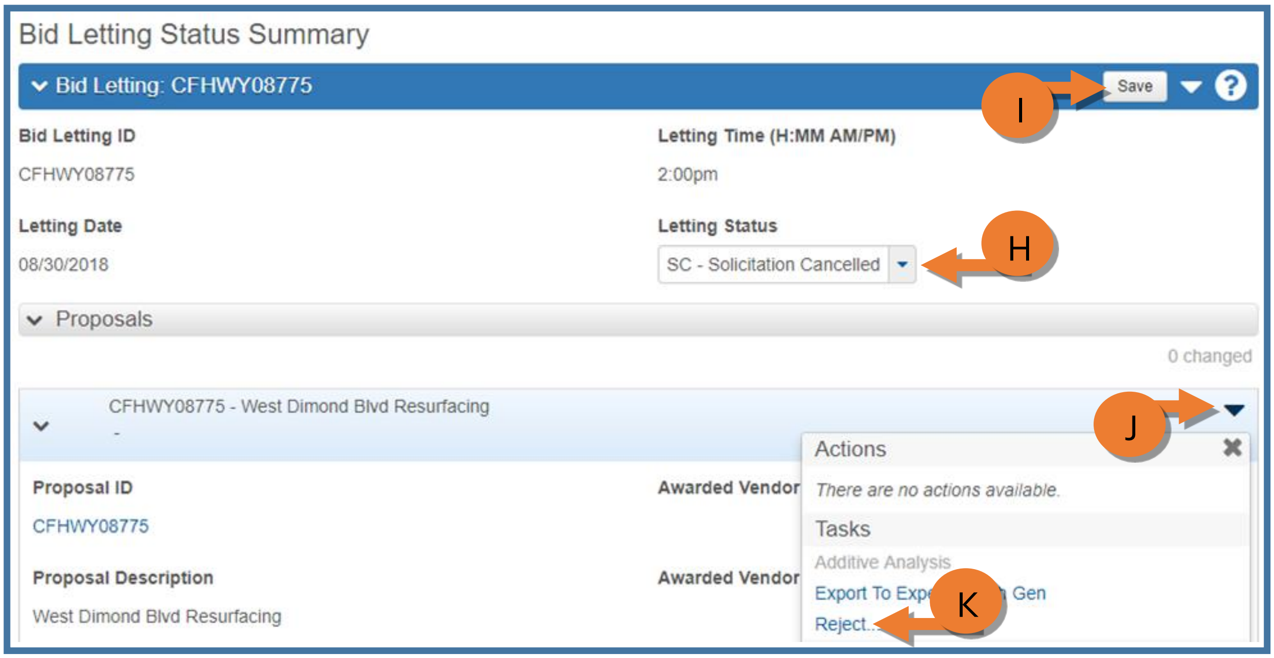


Figure 7.126

A Reject Bids popup window will appear (*Figure 7.127*).

16. (L) Click the **Rejected** checkbox.
17. (M) Click the **<Reject Bids>** button in the lower right of the popup.

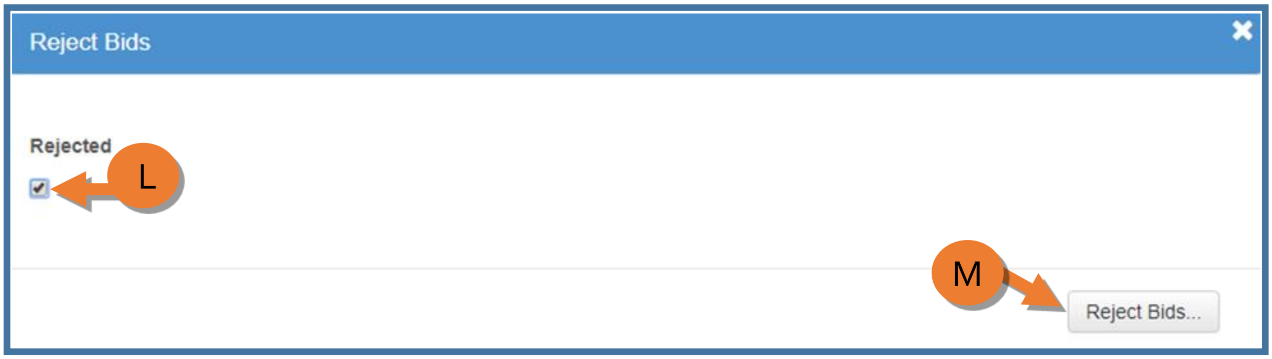


Figure 7.127

Next, you must withdraw the proposal in Bid Express.

18. Go to www.bidx.com and log in (see *Figure 7.32*).
19. Navigate to the Proposal.
20. (N) Click the **Withdraw** link at the top of the Manage Proposal page (*Figure 7.128*).

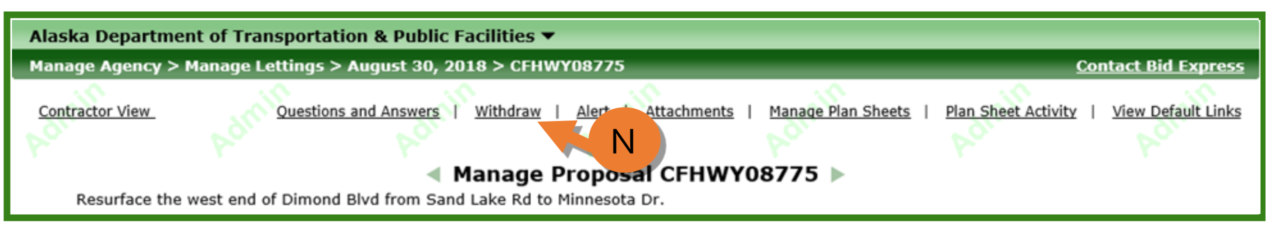


Figure 7.128

The Withdraw Proposal window will appear (*Figure 7.129*).

21. (O) In the **Message** field, type **Solicitation Cancelled**. Anything written in the Message box will appear on the Letting page next to the proposal once it has been withdrawn.
22. (P) Click the **<Withdraw>** button.

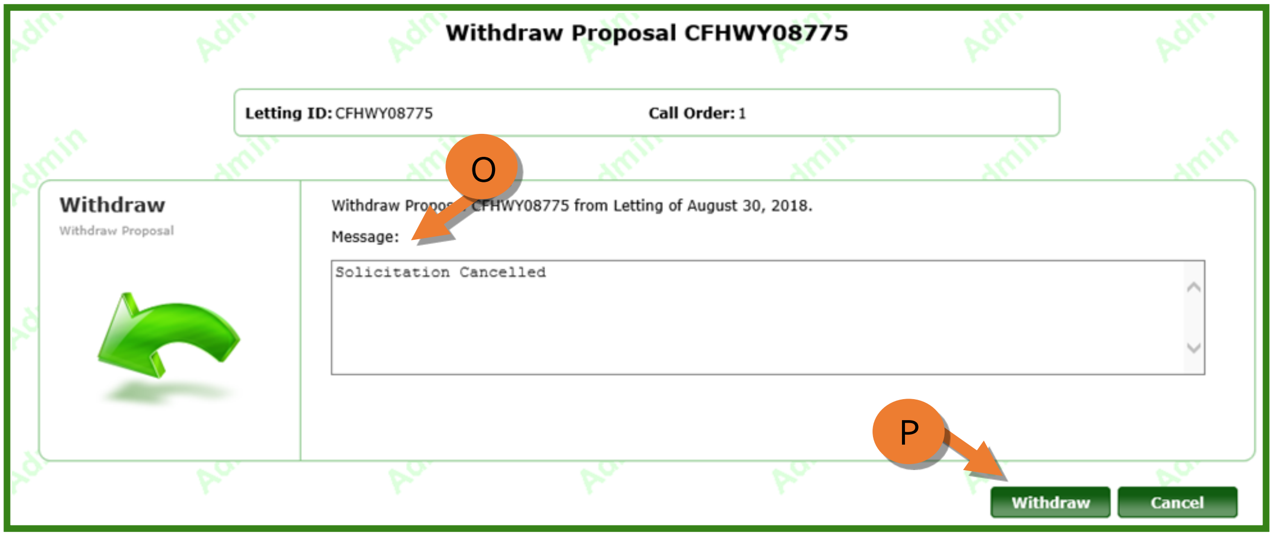


Figure 7.129

You may get a prompt warning you that bids may already be placed on your proposal.

23. Click **<OK>**.

There will be a notice in red at the top of the Manage Proposal page and the contractor view proposal page (*Figure 7.130*).

Figure 7.130

Create Alerts on both the Letting and Proposal page announcing the cancellation of the solicitation.

For cancelled solicitations, reports will show "Solicitation Cancelled" in place of the vendor and no value will appear for the awarded amount.