



4.6 Creating and Managing Addenda

Background:

When the letting is advertised, the **Proposal Workflow Phase** must be changed to **Advertising**. 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.

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.

Roles:

Letting User

Navigation:

Proposal Overview > Proposal > Proposal Summary

1. On the Proposal Summary component, click the Addenda quick link.
2. If there is not already an empty row click the **New** button.
3. In the **Add/NTB** field, search for and select **Addendum 1** (or, without beginning typing, press enter to see all possible selections).
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 **Action Menu**.
8. Select **Open**.
 - a. When an addendum is open, AWP tracks any changes made to the proposal or associated project(s).

Adding or Modifying Items via Addendum

1. Navigate to the Proposal Summary component for your proposal while in Advertising mode (the blue notification banner should appear).
2. Select the **Projects** tab.
3. Click the **Project** link.
4. On the Project Summary component, click the **Categories and Items** quick link.
5. Select the **Items** tab.
6. To modify an item, click the **Expand/Collapse** arrow for the item you want to modify.
7. Make any necessary changes.
8. Repeat for all items that require modification.
9. Click **Save**.
10. To add a new item, click the **New** button.
11. In the **Item ID** field, search for and select the item you want to add.
12. In the **Quantity** field, enter the estimated quantity for the addendum item.



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13. In the **Project Item Unit Price** field, enter the estimated unit price for the addendum item.
14. From the **Category ID** dropdown, select the category to which the addendum item should be assigned.
15. In the **Proposal Line Number** field, type the appropriate proposal line number.
16. 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.
17. If your item is to be assigned to a current fund package, click the **Funding: Assign to Items** quick link.
 18. Select the radio button associated with the correct fund package.
 19. Click **Save**.

Regenerate proposal sections and items.

20. On the Proposal Summary component, click the **Sections and Items** quick link.
21. Expand the **Component Actions Menu** and select **Auto Generate Sections**.
22. Click **Save**.

Postponing a Letting via Addendum

1. Navigate to the Bid Letting Summary component for the letting you want to postpone.
2. Expand the **Component Actions Menu**.
3. Select **Add New**.
 - a. The Quick Add Bid Letting component will appear.
4. In the **Letting ID** field, enter the old letting ID and add **_1** on the end (i.e. NFWY00404_1).
5. In the **Letting Date** field, click the calendar icon and select the new letting date.
6. In the **Original Letting ID if Postponed or Re-Let** field search for and select the Original Letting ID.
7. In the **Letting Status** field, select **Scheduled** from the dropdown.
8. Enter the **Let Time, Letting Location** and **Adv Date**.
9. Click **Save**.
10. From the **Previous** dropdown, go back to the Bid Letting Summary for the letting you are postponing.
11. From the Bid Letting Summary component, click on the **Proposals** tab.
12. Expand the proposal **Row Actions Menu**.
13. Select **Postpone**.
14. Search for and select the new letting you just created. The selected letting will have a green checkmark next to it.
15. 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.
16. Click the **General** tab.



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17. From the **Letting Status** dropdown, change the status to **Re-scheduled**.
18. Click **Save**.

Approving an Addendum

1. From the Bid Letting Summary component, select the **Proposals** tab.
2. Click the **Proposal** link.
3. Expand the Proposal Summary **Component Actions Menu**.
4. Select **Addendum/Notice to Bidders Detail** report.
5. Click **Execute**.
6. Prior to approving the addendum make sure to re-validate your proposal.
7. Return to the Addenda Summary component.
 - a. You can do this by navigating back to the Proposal Summary component (from the Previous button dropdown) and clicking the Addenda quick link.
8. Expand the proposal **Component Actions Menu**.
9. Select **Approve**.

Final Addendum Processing

1. Navigate to the Proposal Summary component.
 - a. You can click the Proposal quick link at the top of the Addenda Summary component page.
2. Expand the proposal **Component Actions Menu**.
3. Select **Addendum/Notice to Bidders Cover Page** report.
4. From the **Addenda Number** dropdown, select the Addendum you want to run the report for.
5. Click **Execute**.

Upload Addendum to Bid Express

1. Generate the addendum ebsx file and addendum ebsx zip file to be uploaded to Bid Express.
 - a. See QRG - *Exporting the Proposal for Use with 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.
2. From the Process History right click on the ebsx addendum link and save to the project folder on the shared drive.
3. Create a zip folder that contains the addendum file (be sure to add zip to the folder name).

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

4. Log into Bid Express, www.bidx.com.
5. Click on the **Agency Admin** tab.
6. 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.
7. Click the **Choose File** button
8. Navigate to the proposal folder on your shared drive and select the ebsx addendum file (ends in .001x, .002x, etc).
9. Click **Open**.
10. Click the **Upload** button.
 - a. A green message bar will appear letting you know the ebsx Amendment file was successfully uploaded.
11. Click on the blue **Proposal** link in the success message bar to go to the Proposal.
12. From the proposal page, click the attachments link just below the green header bar at the top of the page.



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13. Click the **Choose File** button.
14. Navigate to the file you want to upload, click **Open**.
15. Select the **Bid Forms EBSX** attachment type for your new zip file and the **Addendum** attachment type for your PDF.
16. Click the **Upload** button.

Postponing a Letting in Bid Express via Addendum

1. Log onto Bid Express, www.bidx.com.
2. Click on the **Agency Admin** button.
 - a. 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**.
 - a. This brings you to the Manage Lettings page.
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. A calendar and time selection area will open. Select the correct date and time of the new letting.
7. 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. 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. 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 **Choose File** 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.
 - a. Now you can attach the compiled addendum PDF and the new ebsx zip file containing the addendum ebsx file.
 - b. From the proposal page, click the **Attachments** link at the top of the page.
19. Click the **Add Files** button.
20. Navigate to the file you want to upload, click **Open**.
21. Select the **Bid Forms EBSX File** attachment type for the zip file and the **Addendum** attachment type for your PDF.
22. Click the **Upload** button.

Notify Plan Holders of Addendum or Notice to Bidders

1. On the Proposal Summary component, click the **General** tab.



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2. In the **Proposal Process Notifications** dropdown, select *Notify Plan Holders*.
3. Click **Save**.
 - a. The system will send out an email to all proposal vendors notifying them that a notice to bidders or addenda has been issued.

Next Steps:

For additional guidance about the bidding and awarding of contract see QRGs beginning with *5.1 Bidder Q&A* under the Bidding, Awarding and Post-Award sub header.