U.S. Department of Transportation Federal Highway Administration

Acquisitions and e-Bidding Participant Guide

Contents

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2. Introduction to Using the Participant Guide

The Participant Guide helps you get started with the processes of acquisition (or Bidding) and e-Bidding and quickly navigate through the various key processes of each module.

The options selected for use in this guide are for instructional purposes to showcase the entire lifecycle of acquisition and e-Bidding. Field selections, other than the ones used in this guide, could possibly lead to a varied workflow and may not be covered in this guide. For additional information on the application, refer to the User Guide or Masterworks Online Help available with the application.

Note: You may notice screenshots containing information added throughout the document, even in places where a new empty screen would typically be displayed. This practice eliminates the need for multiple images, allowing a single screenshot to convey the essential details required to proceed with the work effectively.

3. Bidding

The Acquisitions or Bidding module provides automation of business processes once the engineer's estimate is moved to the Final Estimate workflow status.

You can create advertisements, initiate estimate updates, create amendments, and publish it to the e-Bidding module. Once the advertisements (or amendments, if available) are published, bidders (contractors) log in to Masterworks e-Bidding module and update their bid information such as bid prices, guarantee, number of days for A+B bidding and submit their bids. After the bid opening date and time have passed, all the submitted bids are available to the acquisitions team to review each bid, tabulate bids, and update incentive amounts.

If necessary, Masterworks also enables you to make changes to the final engineer's estimate in the Bidding module.

You can also import paper bids. Once all the analysis is complete, you can select specific schedules and award the bid.

The functional flow for Bidding module is as follows:

1. 3.1. Advertisement
    a. 3.1.1. Create advertisements
    b. 3.1.2. Publish advertisements
    c. 3.1.3. Cancel advertisements
2. 3.2. Amendment
    a. 3.2.1. Create amendments
    b. 3.2.2. Publish amendments
3. 3.4. Bid Opening and Review
    a. 3.4.1. Review bids
    b. 3.4.2. Import bids
    c. 3.4.3. Award bids

The functional flow for e-Bidding module is as follows:

- 3.3.3. Submit bid responses
- 3.3.4. Modify submitted bid responses
- 3.3.5. Withdraw bids

- 3.3.6. Acknowledge amendments

Bidding Permission Matrix

This section provides information on the roles and corresponding permissions for the respective forms.

Table 1: Table 1 – Advertisement

Role	Create	Edit	View	Delete	Audit Log
Administrator	Yes	Yes	Yes	Yes	Yes
Project Viewer	–	–	Yes	–	–
Design Component Lead	–	–	Yes	–	–
Designer	–	–	Yes	–	–
Lead Designer	–	–	Yes	–	–
Design QA/QC	–	–	–	–	–
Highway Design Manager	–	–	Yes	–	–
Project Manager	–	–	Yes	–	–
A/E Designer	–	–	Yes	–	–
A/E Lead Designer	–	–	Yes	–	–
A/E Manager	–	–	Yes	–	–
Acquisitions	Yes	Yes	Yes	Yes	Yes
Construction Component Lead	–	–	Yes	–	–
Construction Admin Staff	–	–	Yes	–	–
Construction Engineer	–	–	Yes	–	–
Highway Construction Manager/QA QC	–	–	Yes	–	–
Construction Operations Engineer	–	–	Yes	–	–
Inspector	–	–	Yes	–	–
Assistant Project Engineer	–	–	Yes	–	–
Project Engineer	–	–	Yes	–	–
Regional Engineer	–	–	Yes	–	–

Table 2: Table 2 – Amendment

Role	Create	Edit	View	Delete	Audit Log
Administrator	Yes	Yes	Yes	Yes	Yes
Project Viewer	–	–	Yes	–	–
Design Component Lead	–	–	Yes	–	–
Designer	–	–	Yes	–	–
Lead Designer	–	–	Yes	–	–
Design QA/QC	–	–	–	–	–
Highway Design Manager	–	–	Yes	–	–
Project Manager	–	–	Yes	–	–
A/E Designer	–	–	Yes	–	–
A/E Lead Designer	–	–	Yes	–	–
A/E Manager	–	–	Yes	–	–
Acquisitions	Yes	Yes	Yes	Yes	Yes
Construction Component Lead	–	–	Yes	–	–
Construction Admin Staff	–	–	Yes	–	–
Construction Engineer	–	–	Yes	–	–
Highway Construction Manager/QA QC	–	–	Yes	–	–
Construction Operations Engineer	–	–	Yes	–	–
Inspector	–	–	Yes	–	–
Assistant Project Engineer	–	–	Yes	–	–
Project Engineer	–	–	Yes	–	–
Regional Engineer	–	–	Yes	–	–

Table 3: Table 3 – Bid Opening and Review

Role	Create	Edit	View	Delete	Audit Log
Administrator	Yes	Yes	Yes	Yes	Yes
Project Viewer	–	–	Yes (Public projects only)	–	–
Design Component Lead	–	–	Yes (Public projects only)	–	–

Role	Create	Edit	View	Delete	Audit Log
Designer	–	–	Yes (Public projects only)	–	–
Lead Designer	–	–	Yes (Public projects only)	–	–
Design QA/QC	–	–	Yes (Public projects only)	–	–
Highway Design Manager	–	–	Yes (Public projects only)	–	–
Project Manager	–	–	Yes (Public projects only)	–	–
A/E Designer	–	–	Yes (Public projects only)	–	–
A/E Lead Designer	–	–	Yes (Public projects only)	–	–
A/E Manager	–	–	Yes (Public projects only)	–	–
Acquisitions	Yes	Yes	Yes	Yes	Yes
Construction Component Lead	–	–	Yes (Public projects only)	–	Yes
Construction Admin Staff	–	–	Yes (Public projects only)	–	Yes
Construction Engineer	–	–	Yes (Public projects only)	–	–
Highway Construction Manager/QA QC	–	–	Yes (Public projects only)	–	–
Construction Operations Engineer	–	–	Yes (Public projects only)	–	–
Inspector	–	–	Yes (Public projects only)	–	–
Assistant Project Engineer	–	–	Yes (Public projects only)	–	–
Project Engineer	–	–	Yes (Public projects only)	–	–
Regional Engineer	–	–	Yes (Public projects only)	–	–
Construction Inspection A&E Manager	–	–	Yes (Public projects only)	–	–
Inspector A&E	–	–	Yes (Public projects only)	–	–
Assistant Project Engineer A&E	–	–	Yes (Public projects only)	–	–

Role	Create	Edit	View	Delete	Audit Log
Project Engineer A&E	–	–	Yes (Public projects only)	–	–

3.1. Advertisement

An advertisement is a formal and competitive process to solicit bids for the project.

The **Advertisement** form enables you to create advertisements, define advertisement attributes, initiate engineers' estimate updates, and publish the advertisement to the **e-Bidding** module.

You can create only one advertisement for a project. The advertisement process is designed in such a way that multiple bidders can compete for the same advertisement.

You can perform the following tasks:

- 3.1.1. Create advertisements
- 3.1.2. Publish advertisements
- 3.1.3. Cancel published advertisements

3.1.1. Creating an Advertisement

Prerequisites

- The engineer's estimate must be in the **Final Estimate** workflow status.
- The role of the logged-in user must be any of the following:
    - Administrator
    - Acquisition

For more information on role-specific permissions, refer to Table 1 – Advertisement Permission Matrix.

Overview

The Advertisement form enables you to create a new advertisement. You can create only one advertisement for a project.

Steps

1. In the menu **module**, click **Projects**.
   The **PROJECTS** list page is displayed.

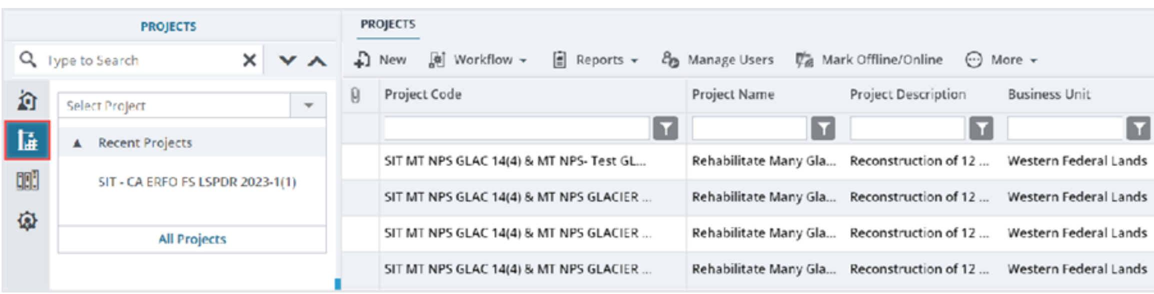


Figure 1: Navigation to Projects Module

2. In the list page, double-click the appropriate project, and then click the project folder to expand it.

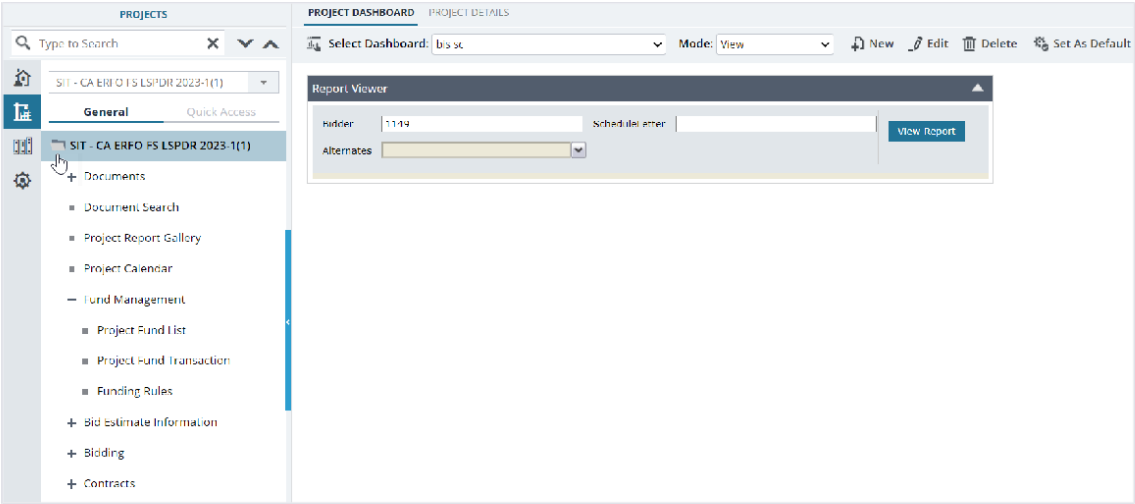


Figure 2: Expanding Projects Folder

3. In the navigation pane, expand **Bidding**, and then click **Advertisement**.
   The **ADVERTISEMENT** list page is displayed.

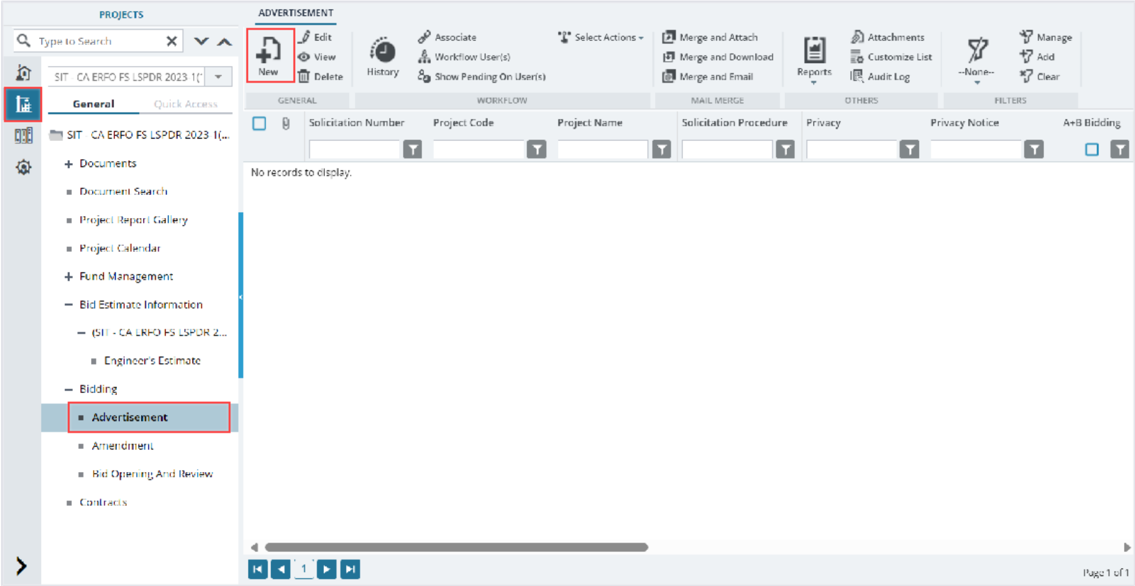


Figure 3: List Page of the Advertisement Form

4. Click **New.**
   The **ADVERTISEMENT** page is displayed.

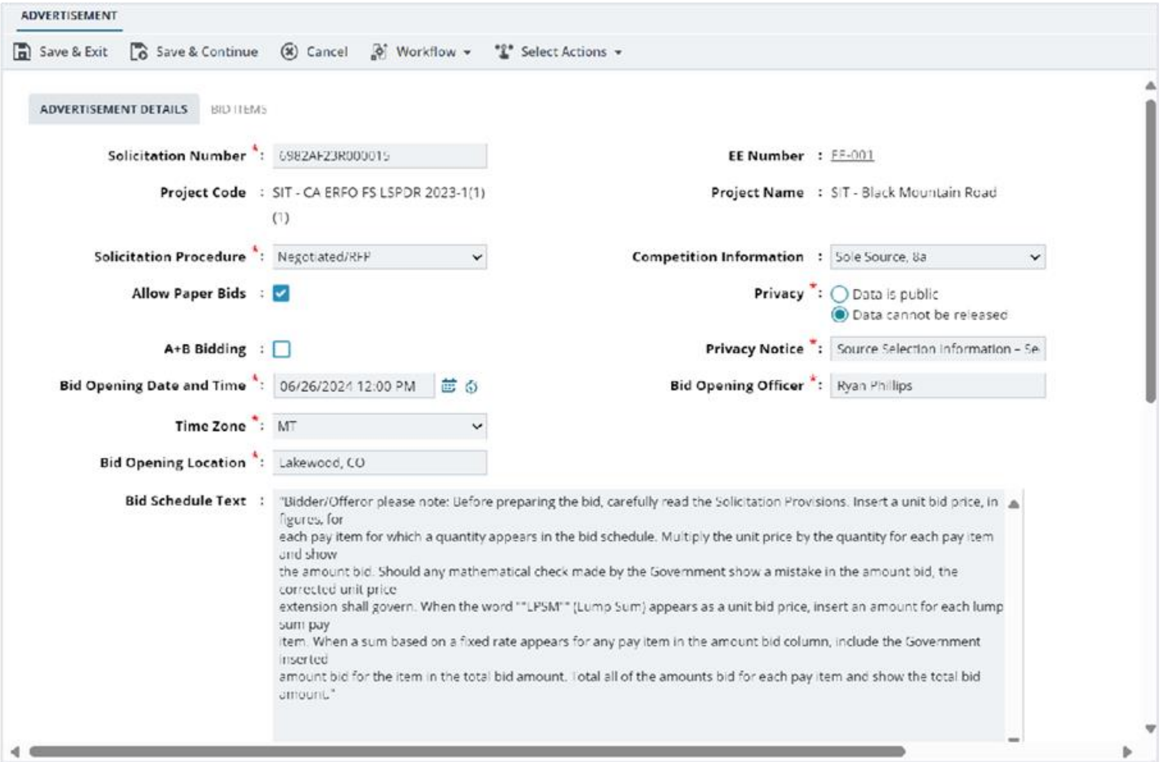


Figure 4: Advertisement

The Advertisement Details tab displays the following information:

Field Name	Description
EE Number	The estimate number of the final engineer's estimate is available as a hyperlink. Upon clicking the link, the engineer's estimate opens in a new tab.
Project Code	The project code of the project.
Project Name	The name of the project.
Bid Schedule Text	The content from the Bid Schedule Text catalog of the library. Note: Optionally, you can change the text as necessary for the specific advertisement

5. Provide the appropriate information in the fields, as described in the following table:

Field Name	Description
Solicitation Number	Enter a unique alphanumeric code to identify the advertisement.
Solicitation Procedure	From the drop-down list, select the appropriate solicitation procedure.

Field Name	Description
	Available options are Design-Build, Letter Contract, Negotiated/RFP, Other, etc. The drop-down list displays the solicitation procedures defined in the Solicitation Procedure catalog of the library.
Allow Paper Bids	Select the check box to enable importing paper bids in the Bid Opening And Review form. For more information on importing paper bids, refer to Section 3.4.2. Importing a Bid.
Competition Information	From the drop-down list, select the appropriate competition information. The available options are Best Value—LPTA, Best Value—Trade Off, Full & Open, Sole Source, 8a, etc. The drop-down list displays the competition information defined in the Competition Information catalog of the library.
Privacy	Select the appropriate option. If the Data cannot be released option is selected, then the Privacy Notice field is displayed. The Privacy Notice field displays a default value. However, you can edit it as necessary. **Note:** For the records selected with the Data cannot be released option, if you perform a Unit Price Search, those records are
A+B Bidding	Select the check box to enable the combination of bid item cost and time component for awarding a bid. • **A** denotes the cost of the actual bid item. • **B** denotes the time component associated with the bid item.
Bid Opening Date and Time	Select the date and time at which the bids received from contractors will be opened for analysis. • Click, and select the date. **Note**: You must select only future dates. • Click, and select the time.
Bid Opening Officer	Enter the name of the bid opening officer.
Time Zone	Select the appropriate time zone. Options available are EST, MT, PST, etc. The drop-down list displays time zones defined in the **Time Zones** catalog of the library. The selected time zone determines when the bid opening date and time have passed. **Note:** The default value is set to the time zone of the division to which the project belongs.
Bid Opening Location	Enter the appropriate location for bid opening.

6. To restrict the solicitation availability to a specific set of contractors, in the **LISTING OF CONTRACTORS ALLOWED TO SUBMIT THE BID** section, perform the following steps:
   a. Click Add.
      The **New LISTING OF CONTRACTORS ALLOWED TO SUBMIT THE BID** dialog box is displayed.

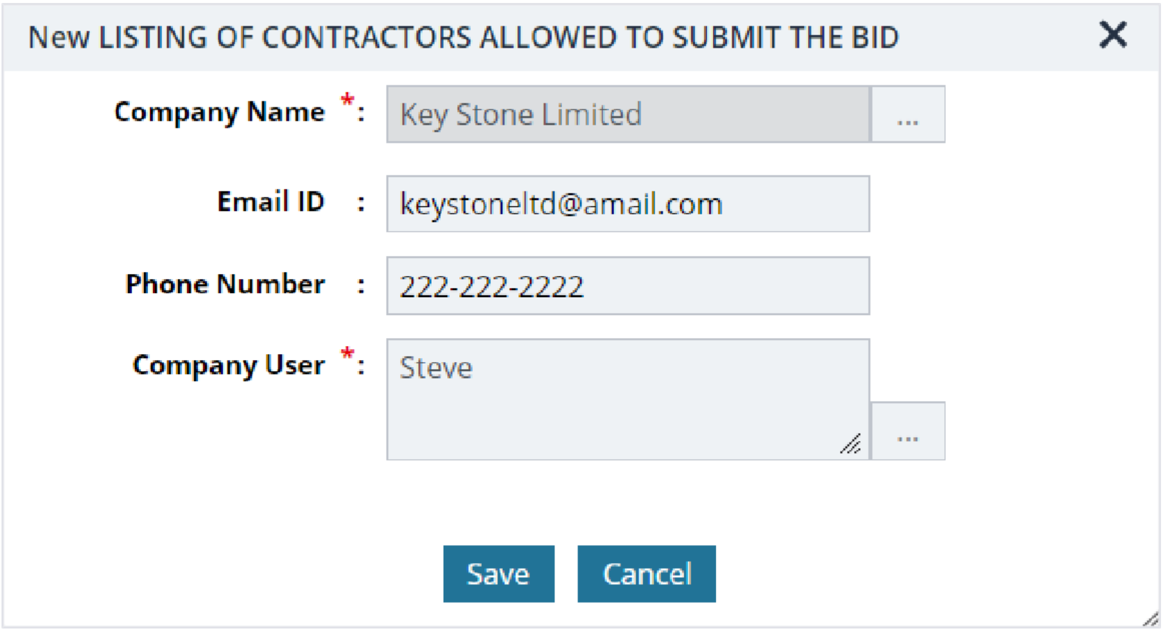
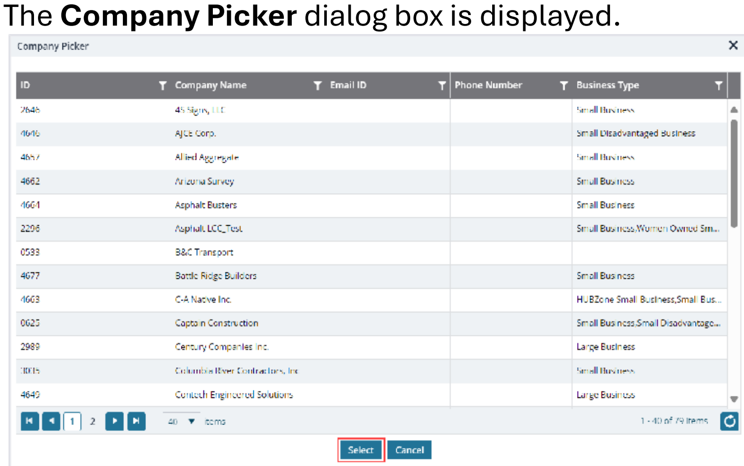
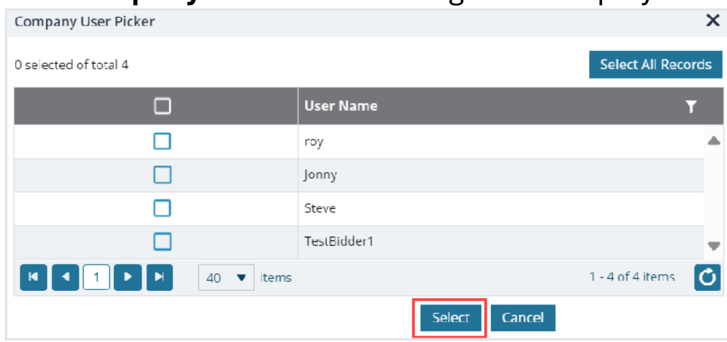


Figure 5: Contractors Allowed to Submit the Bid

   b. Provide the appropriate information in the fields, as described in the following table:

Field Name	Description
Company Name	To select the company name, perform the following steps: i. Click ... The **Company Picker** dialog box is displayed.  *Figure 6: Company Picker Dialog Box*

Field Name	Description
	Available options are active company names defined in the **Contractor Details catalog** of the library. ii. Click the appropriate company, and then click **Select**.
Email ID	Enter the email address of the company.
Phone Number	Enter the contact number of the company.
Company User	To select the users, perform the following steps: a. Click The **Company User Picker** dialog box is displayed.  *Figure 7: Company User Picker Dialog Box* Based on the company selected in the **Company Name** field, the names of the users vary. Available options are active users with the Bidder role defined at the enterprise level. b. Select the check boxes adjacent to the appropriate users, and then click **Select.**

c. Click **Save**.

d. Optionally, perform the following steps, as applicable:

- To edit a record, click the appropriate record, click Edit, and then repeat steps **6b** to **6c**, as applicable.
- To delete a record, click the appropriate record, click **Delete**, and then click **OK**.

7. Optionally, in the **ATTACHMENTS** section, upload or link related files. For information on attachments, refer to Section 4.1. Attachments.

8. To view all the advertisement items, click the **Bid Items** tab.

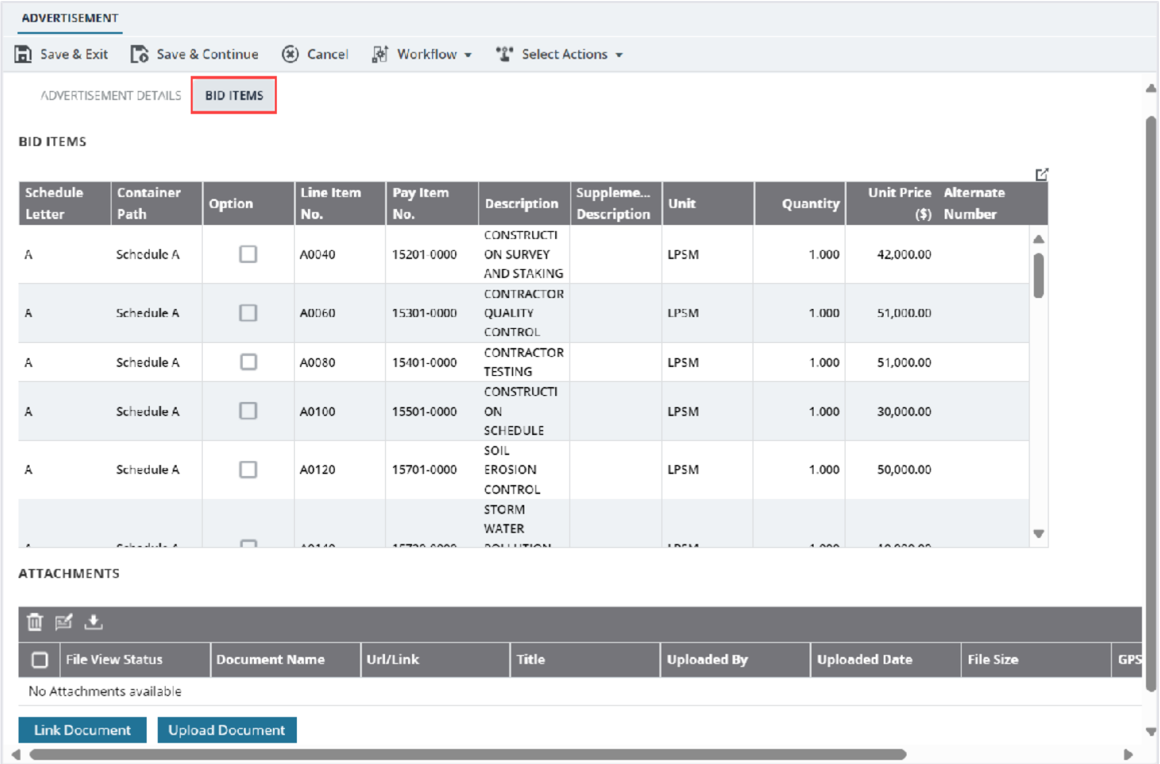


Figure 8: Bid Items Tab

The Bid Items tab displays all the bid items that is published to the E-bidding module.

The following sections are displayed:

Section Name	Description
BID ITEMS	Details of the items from the final engineer's estimate.
A+B BIDDING	This section is available only if the A+B Bidding check box is selected at the Advertisement Details tab.

The **BID ITEMS** section displays the following information:

Note: You cannot make any changes to the items available in the **BID ITEMS** section.

Column Name	Description
Schedule Letter	The schedule letter as defined for the container in the final engineer's estimate.
Container Path	The name of the container as defined in the final engineer's estimate.
Option	The **Pay Item No** defined as Base or Option in the final engineer's estimate. If a Pay Item No is defined as Option, then the checkbox adjacent to the respective pay item is selected.

Column Name	Description
Description	The description of the **Pay Item No** from the final engineer's estimate.
Supplemental Description	The additional description of the **Pay Item No** as defined in the final engineer's estimate.
Unit	The unit of the **Pay Item No** from the final engineer's estimate.
Quantity	The quantity of the **Pay Item No** as defined in the final engineer's estimate.
Unit Price ($)	The unit price of the **Pay Item No** as defined in the final engineer's estimate.
Alternate Number	The sub container name of the **Pay Item No** as defined in the final engineer's estimate.
Description	The description of the **Pay Item No** from the final engineer's estimate.
Supplemental Description	The additional description of the **Pay Item No** as defined in the final engineer's estimate.

9. To add a schedule letter and its attributes, in the **A+B BIDDING** section, perform the following steps:

Note: This section is available only if the A+B Bidding check box is selected at the Advertisement Details tab.

a. Click **Add**.
The New **A+B Bidding** dialog box is displayed.

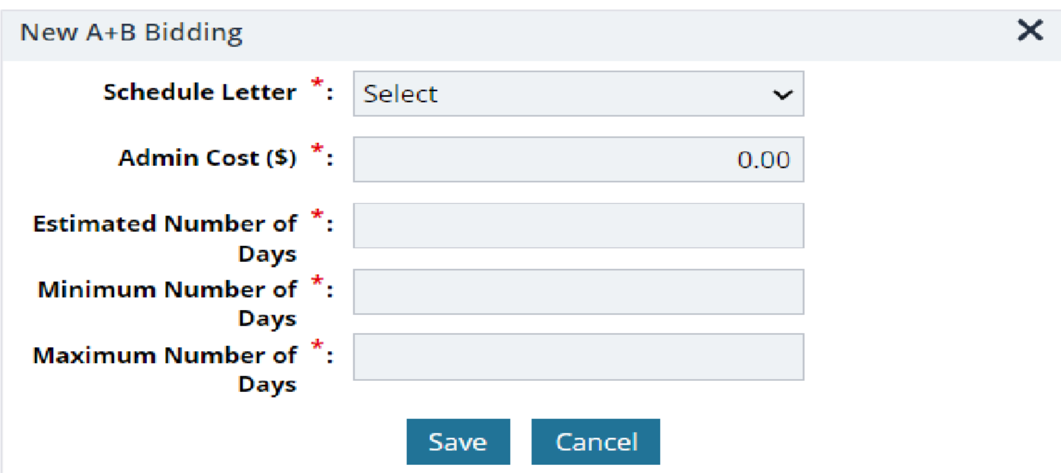


Figure 9: New A+B Bidding Dialog Box

b. Provide the appropriate information in the fields, as described in the following table:

Field Name	Description
Schedule Letter	From the drop-down list, select the appropriate option. Available options are the schedule letters from the final

Field Name	Description
	engineer's estimate. Once a letter is added to this field, you cannot add the same letter again.
Admin Cost ($)	Enter an estimated cost per day.
Estimated Number of Days	Enter the total number of days estimated to complete the work. **Note:** • You must enter positive numbers without decimals. • The number of days must be within the range of the minimum and maximum number of days.
Minimum Number of Days	Enter the minimum number of days required to complete the work. **Note:** • You must enter positive numbers without decimals. • In the e-Bidding module, the bidder must enter the value of the (A+B) Number of Days field greater than or equal to this number.
Maximum Number of Days	Enter the maximum number of days required to complete the work. **Note:** • You must enter positive numbers without decimals. • In the E-bidding module, the bidder must enter the value of the (A+B) Number of Days field lesser than or equal to this number.

c. Click **Save**.
d. Optionally, perform the following steps, as applicable:
   - To edit a record, click the appropriate record, click **Edit**, and then **repeat** steps **9b to 9c**, as applicable.
   - To delete a record, click the appropriate record, click **Delete**, and then click **OK**.

10. Optionally, in the **ATTACHMENTS** section, upload or link related files. For information on attachments, refer to Section 4.1. Attachments.
11. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

3.1.2. Publishing an Advertisement

Prerequisites

The role of the logged-in user must be any of the following:

- Administrator
- Acquisitions

Overview

This section explains the positive and forward workflow actions to reach the Advertisement Published workflow status. To move an Advertisement record through the defined workflow, perform the following steps:

Steps

1. In the module menu, click **Projects**.
   The **PROJECTS** list page is displayed.

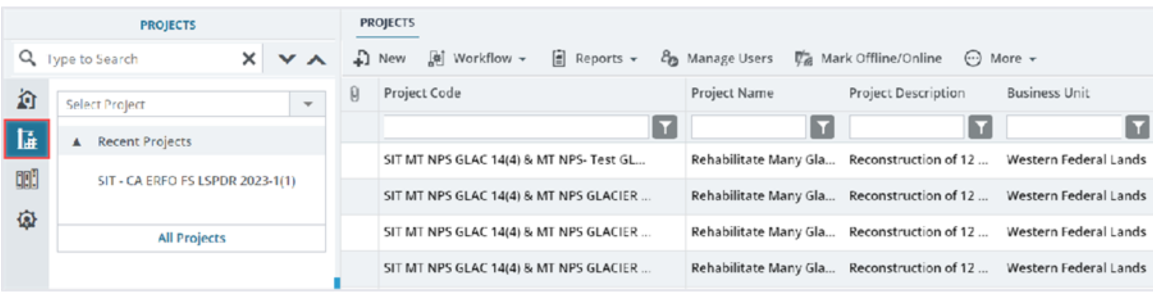


Figure 10: Navigation to Projects Module

2. In the list page, double-click the appropriate project, and then click the project folder to expand it.

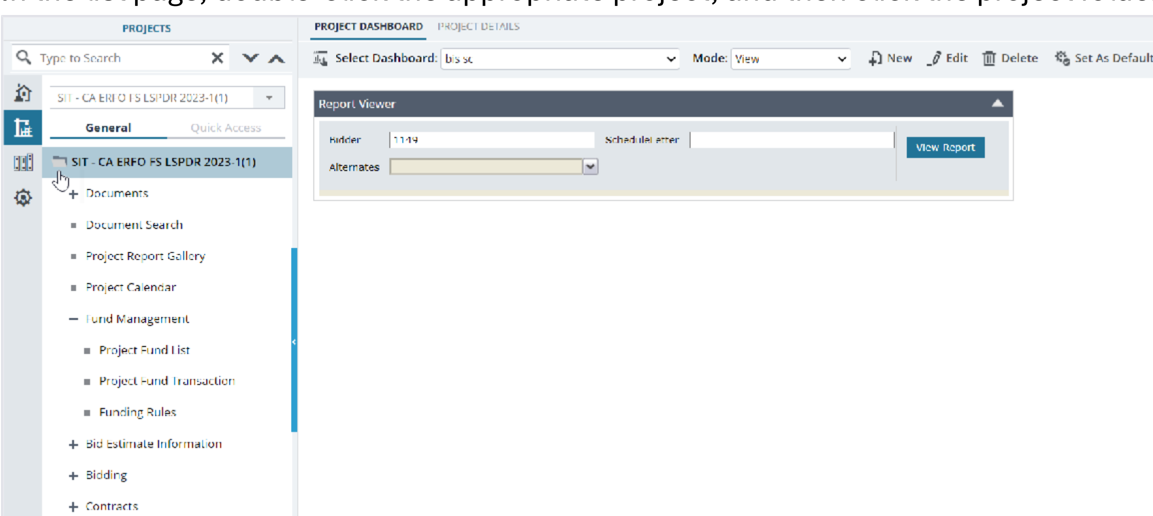


Figure 11: Expanding Projects Folder

3. In the navigation pane, expand **Bidding**, and then click **Advertisement**.
   The **ADVERTISEMENT** list page is displayed.

4. In the list page, select the appropriate record in the **Draft** workflow status, and then click **Select Actions**.

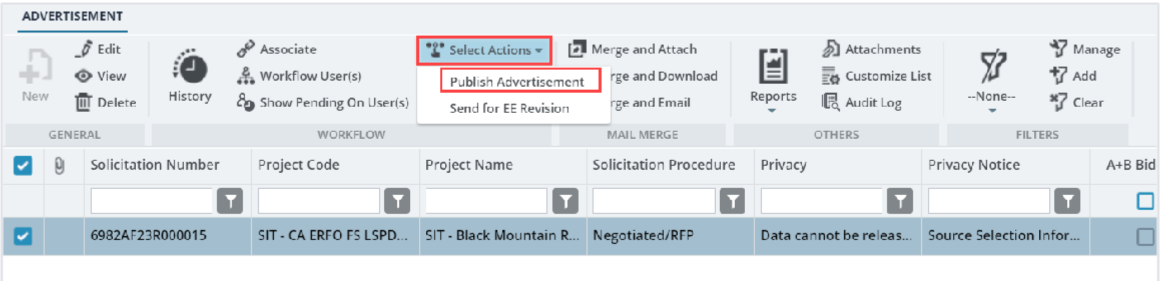


Figure 12: Workflow Action - Publish Advertisement

5. Click **Publish Advertisement**, and in the Masterworks dialog box, click **OK**.
   The record is moved to the **Advertisement** Published workflow status.

3.1.3. Canceling an Advertisement

Prerequisites

The advertisement must be in the Advertisement Published workflow status.

- The bid is not awarded.
- The role of the logged-in user must be any of the following:
  - Administrator
  - Acquisitions

Steps

1. In the module menu, click **Projects**.
   The **PROJECTS** list page is displayed.

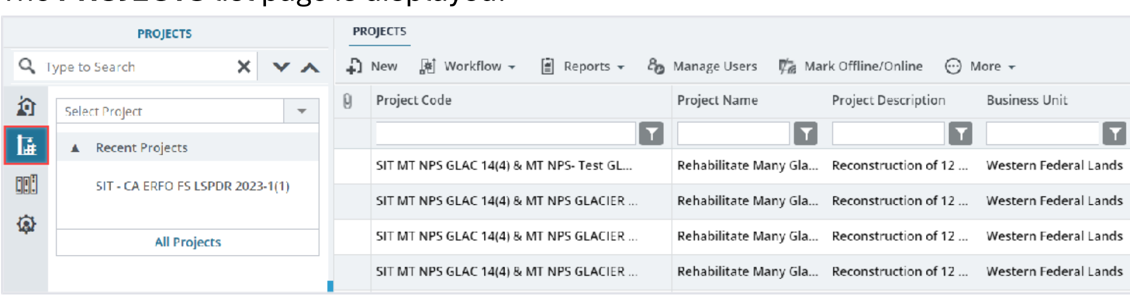


Figure 13: Navigation to Projects Module

2. In the list page, double-click the appropriate project, and then click the project folder to expand it.

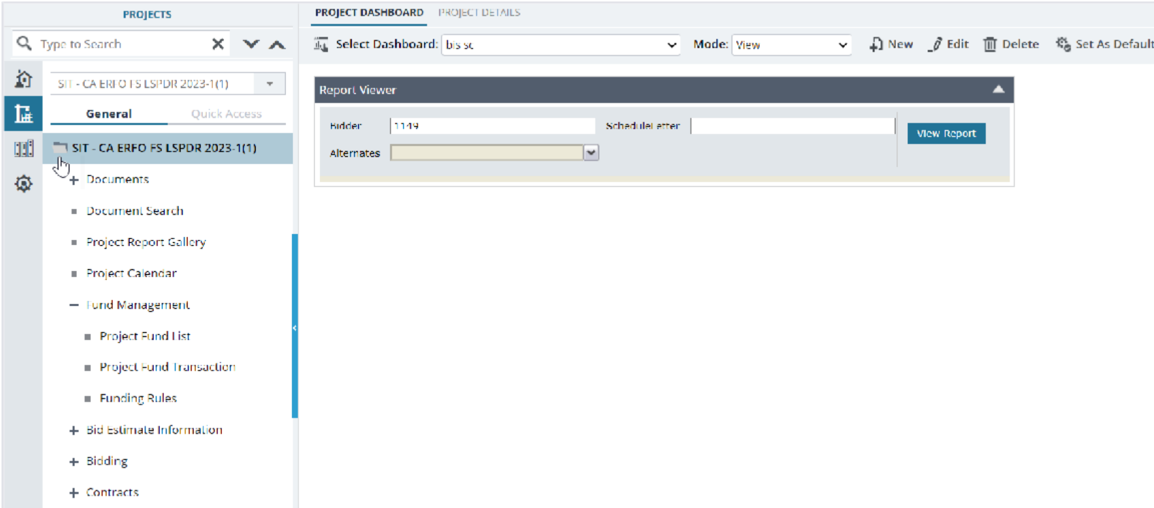


Figure 14: Expanding Projects Folder

3. In the navigation pane, expand **Bidding**, and then click Advertisement.
   The **ADVERTISEMENT** list page is displayed.
4. In the list page, select the appropriate record in the **Advertisement Published** workflow status, and then click **Select Actions**.

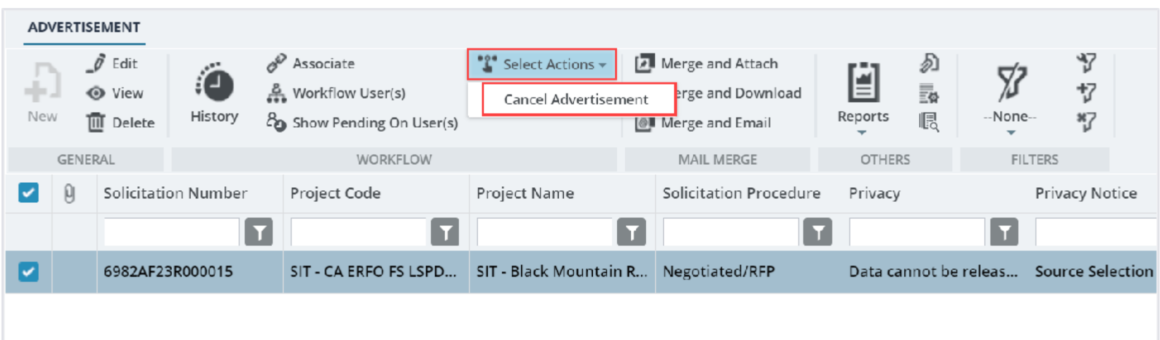


Figure 15: Workflow Action – Cancel Advertisement

5. Click **Cancel Advertisement**, and in the Masterworks dialog box, click **OK**.
   The record is moved to the **Advertisement Canceled** workflow status.
   For more information on the changes after the record is canceled, refer to Section 3.1.4. Advertisement Workflow Status.

3.1.4. Advertisement Workflow Status

The following table provides the workflow status (current and subsequent status) of the **Advertisement** record.

For information on setting a workflow status to the next status, refer to Section 4.3. Workflow Status Transitions.

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
1.	Draft	Administrator Acquisitions	Publish Advertisement	Advertisement Published	After the record is moved to the Advertisement Published workflow status, the following changes occur: The The published advertisement is available in the e-Bidding module. The published advertisement cannot be edited.
			Send for EE Revision	Pending EE Revision	After the record is moved to the **Pending EE Revision** workflow status, the following changes occur: • The previous **Engineer's Estimate** is in the **Final Estimate** workflow status and is automatically moved to the **Archived** workflow status. • A version of the same

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					Engineer's Estimate record is automatically created in the Draft workflow status. • An email is sent to the users assigned the Lead Designer role for the project.
2	Pending EE Revision	<System Automated>	–	EE Updated	Once the newly created Engineer's Estimate version is moved to the Final Estimate workflow status, Masterworks automatically moves the Advertisement record to the **EE Updated** workflow status. **Note:** This workflow action cannot be performed manually. An email is sent to the users assigned to the Acquisition role for the project.
3.	EE Updated	• Administrator • Acquisitions	Publish Advertisement	Advertisement Published	After the record is moved to the Advertisement Published workflow status, the following changes occur: • The published Advertisement is available

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					in the e-Bidding module. • The published advertisement cannot be edited.
			Send for EE Revision	Pending EE Revision	After the record is moved to the **Pending EE Revision** workflow status, the following changes occur: • The previous Engineer's Estimate in the Final Estimate workflow status is automatically moved to the Archived workflow status. • A version of the same Engineer's Estimate record is automatically created in the Draft workflow status. • An email is sent to the users assigned with the Lead

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					Designer role for the project.
4	Advertisement Published	• Administrator • Acquisitions	Cancel Advertisement	Advertisement Canceled	**Note:** You cannot perform this workflow action after a bid is awarded. However, you can perform this workflow action even after the bids (both E-bidding and Paper Bids) have been received in the system and the Bid Opening and Review date is crossed. Upon performing this workflow action, the following changes occur: • Authorized users cannot create any new advertisement records. • In the **e-Bidding** module, the advertised bid appears as read- only and is automatically moved to the **Cancelled**

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					workflow status. • An email is sent to all the bidders whose bid was in the **Bid in Progress** or **Submitted** workflow status. • If the bids are received from a canceled advertisement, then the bids are automatically canceled, and the record is displayed on the Bid • Opening and reviewing the list page in the **Cancelled** workflow status. • The bid associated with the canceled advertisement that is in the Sent to Bidder for Correction workflow status of the **Bid Opening and Review**

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					form is also set to **Cancelled**.

3.1.5. Generating Advertisement Reports

Prerequisites

The role of the logged-in user must be any of the following:

- Administrator
- Acquisitions

Overview

Based on the roles assigned to you, you can generate a report that illustrates various types of information.

Steps

1. In the module menu, click **Projects**.
   The **PROJECTS** list page is displayed.

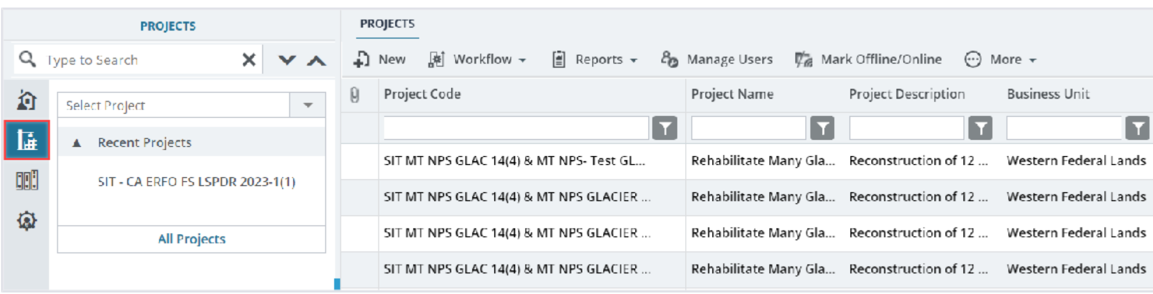


Figure 16: Navigation to Projects Module

2. In the list page, double-click the appropriate project, and then click the project folder to expand it.

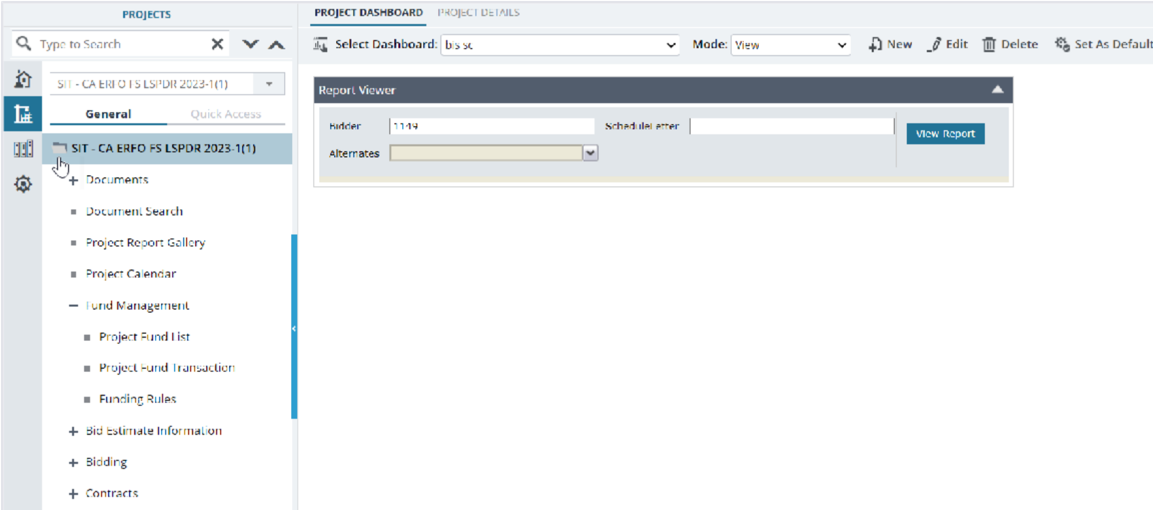


Figure 17: Expanding Projects Folder

3. In the navigation pane, expand **Bidding**, and then click **Advertisement**.
   The **ADVERTISEMENT** list page is displayed.
4. In the list page, click **Reports**, and then click **Bid Schedule Report**.
   The report is generated and displayed.
   For more information on the various report features available, refer to Section [4.2. Standard Report Functions.]

3.2. Amendment

The **Amendment** form enables you to make changes to the published advertisement until the bid opening date and time has passed. You can create an amendment to make changes in the bidding schedule and to modify, add, or delete estimated bid items.

You can create an amendment only after the advertisement is published. The amendment is available to the bidders in the **e-Bidding** module. The bidders must acknowledge the modified items and the updated documents to submit the bid.

You can perform the following tasks:

- 3.2.1. Create amendments
- 3.2.2. Publish amendments

3.2.1. Creating an Amendment

Prerequisites

- The role of the logged-in user must be any of the following:
    - Administrator
    - Acquisitions
- For more information on role-specific permissions, refer to Table 2 – Amendment Permission Matrix.
- The associated advertisement is in the **Advertisement Published** workflow status. For more information on the advertising workflow, refer to Section 3.1.4. Advertisement Workflow Status.
- If there are any prior amendments, then the records must be in the **Amendment Published** workflow status. For more information on the amendment workflow, refer to Section 3.2.3. Amendment Workflow Status.
- The bid opening date and time of the published advertisement or the previously published latest amendment have not passed.

Overview

Until the advertisement is published, the New button is disabled in the Amendment form. You can create only one amendment at a time.

Steps

1. In the module menu, click **Projects**.
   The **PROJECTS** list page is displayed.

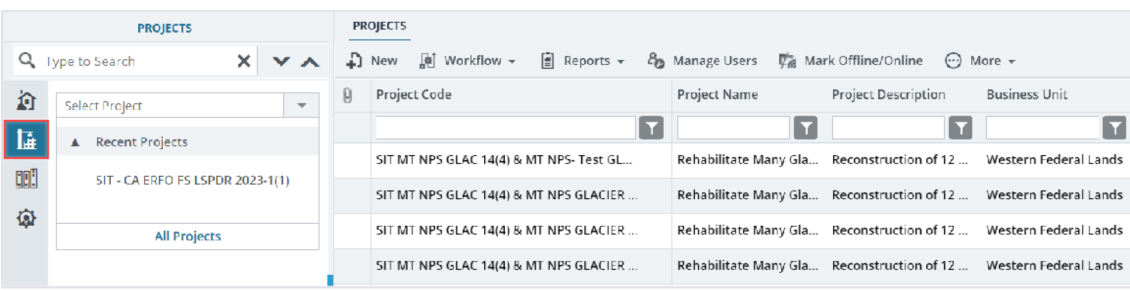


Figure 18: Navigation to Projects Module

2. In the list page, double-click the appropriate project, and then click the project folder to expand it.

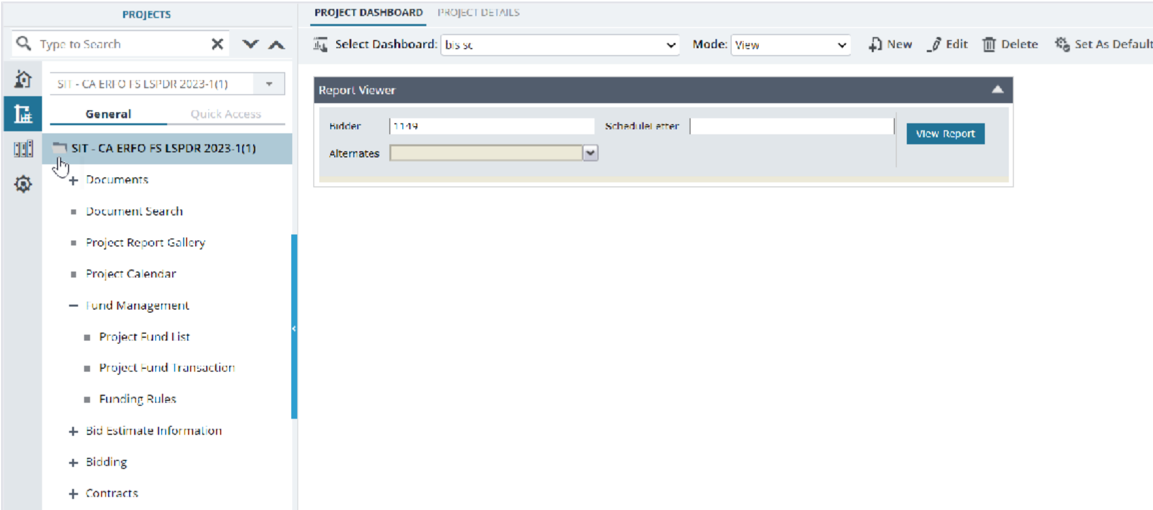


Figure 19: Expanding Projects Folder

3. In the navigation pane, expand **Bidding**, and then click **Amendment**.
   The **AMENDMENT** list page is displayed.

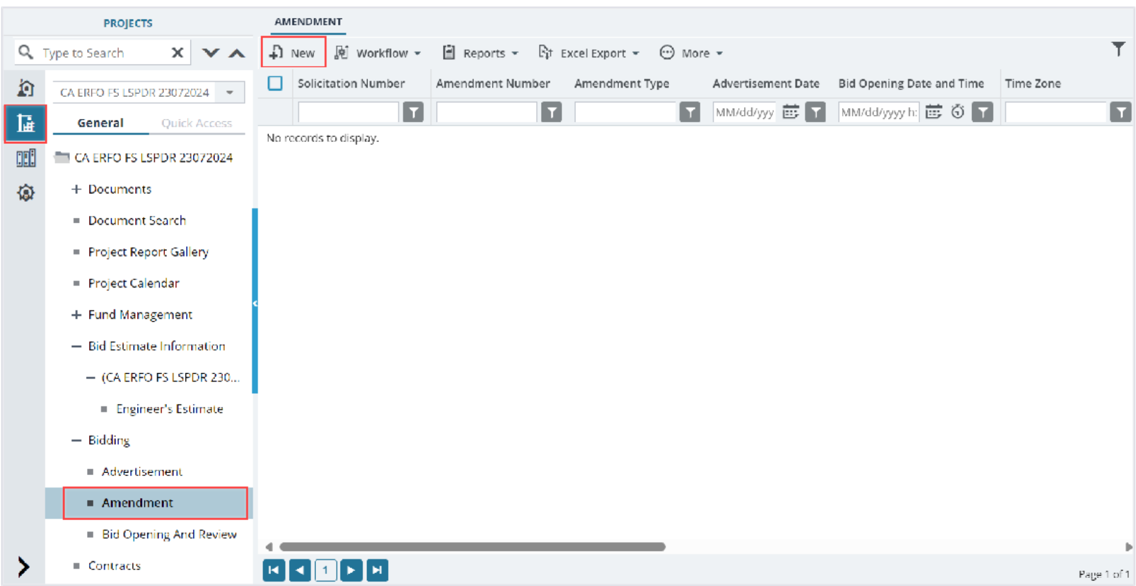


Figure 20: List Page of Amendment Form

4. Click **New**.
   The **AMENDMENT** page is displayed.

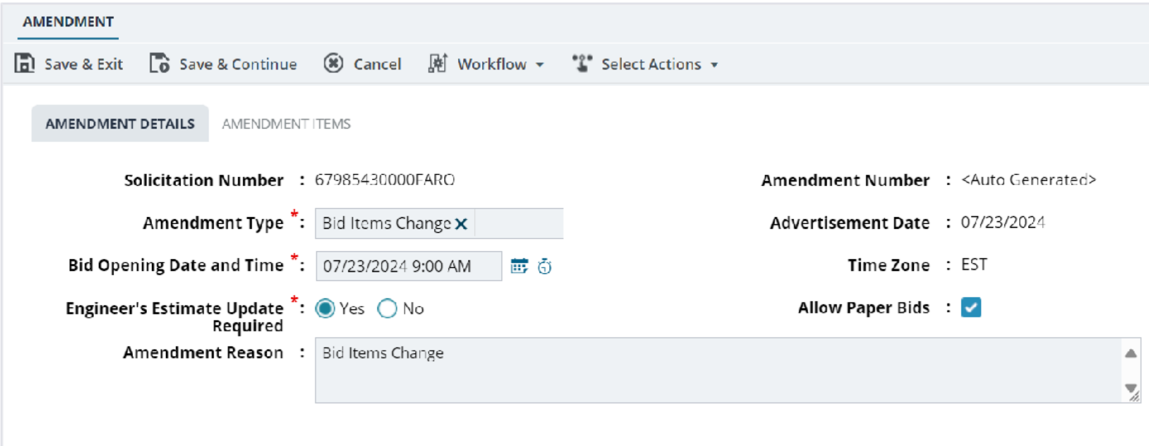


Figure 21: Amendment Details Page

The **Amendment Details** tab displays the following information:

Field Name	Description
Solicitation Number	The solicitation number as defined in the published advertisement.
Bid Opening Date and Time	The date and time as defined in the published advertisement or the latest published amendment, as applicable. **Note:** You can also modify the details with future dates as necessary. For information on entering the details, refer to step 5.
Amendment Number	On saving the record, a unique amendment identification number is automatically generated.
Advertisement Date	The date when the advertisement was published.
Time Zone	The time zone as defined in the published advertisement.
Allow Paper Bids	The check box selection as defined in the published advertisement. **Note:** You can also modify the selection as necessary.

5. Provide the appropriate information in the fields, as described in the following table:

Field Name	Description
Amendment Type	From the multi-select drop-down list, select the amendment type. Available options are Bid Items Change, Administrative Change, and Bid Opening Date Change. The drop-down list displays the active amendment types defined in the Amendment **Types catalog** of the library.
Bid Opening Date and Time	Select the date and time at which the bids received from contractors will be opened for analysis. • Click , and select the date. • Click , and select the time.

Field Name	Description
	Note: The entered date and time must be later than the current date and time.
Engineer's Estimate Update Required	Select the appropriate option, as applicable.
Amendment Reason	Enter the appropriate reason for modifying the published advertisement.

6. If an engineer's estimate is updated due to an amendment, the changes made in the engineer's estimate is available in the **Amendment Items** tab.
   To view the changes made in the engineer's estimate, click the **Amendment Items** tab.

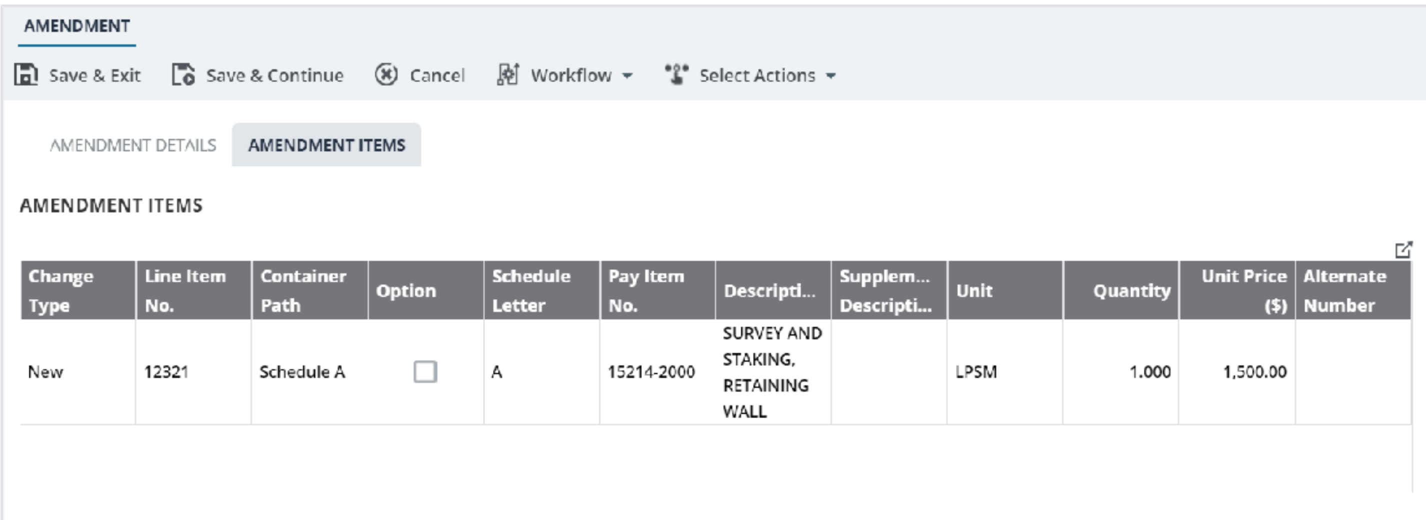


Figure 22:Amendment Items Tab

Note: The **Amendment Items** tab displays relevant information in the **AMENDMENT ITEMS** section only if the **Engineer's Estimate Required** field is selected as Yes and the Amendment record is moved through the **Pending EE Revision** workflow status. For more information on the amendment workflow, refer to Section 3.2.3. Amendment Workflow Status

The **AMENDMENT ITEMS** section displays the following information:

Note: You cannot make any changes to the items available in the **AMENDMENT ITEMS** section.

Column Name	Description
Change Type	Based on the change type of the pay item, the value is displayed. • **New**: A new pay item is added. • **Update**: The quantity of the existing pay item is modified. • **Delete**: The existing pay item is deleted.

Column Name	Description
Line-Item No	The line-item number as defined in the Final Estimate
Container Path	The name of the container as defined in the latest engineer's estimate in the Final Estimate workflow status.
Option	The check box selection is displayed based on whether the Pay Item No is defined as Base or Option in the latest engineer's estimate in the Final Estimate workflow status. If a Pay Item No is defined as Option, then the check box adjacent to the respective pay item is selected.
Schedule Letter	The schedule letter as defined for the container in the latest engineer's estimate in the Final Estimate workflow status.
Pay Item No	The pay item number from the latest engineer's estimate in the Final Estimate workflow status.
Description	The description of the **Pay Item No** from the latest engineer's estimate in the Final Estimate workflow status.
Supplemental Description	The additional description of the **Pay Item No** as defined in the latest engineer's estimate in the Final Estimate workflow status.
Unit	The unit of the **Pay Item No** from the latest engineer's estimate in the Final Estimate workflow status.
Quantity	The quantity of the **Pay Item No** as defined in the latest engineer's estimate in the Final Estimate workflow status.
Unit Price ($)	The unit price of the **Pay Item No** as defined in the latest engineer's estimate in the Final Estimate workflow status.
Alternate Number	The sub container name of the **Pay Item No** as defined in the latest engineer's estimate in the Final Estimate workflow status.

7. Click **Save & Exit** to save the record and return to the list page.
   Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

3.2.2. Publishing an Amendment

Prerequisites

The role of the logged-in user must be any of the following:

- Administrator
- Acquisitions

Overview

This section explains the positive and forward workflow actions to reach the Amendment Published workflow status. To move an Amendment record through the defined workflow, perform the following steps:

Steps

1. In the module menu, click **Projects**.
   The **PROJECTS** list page is displayed.

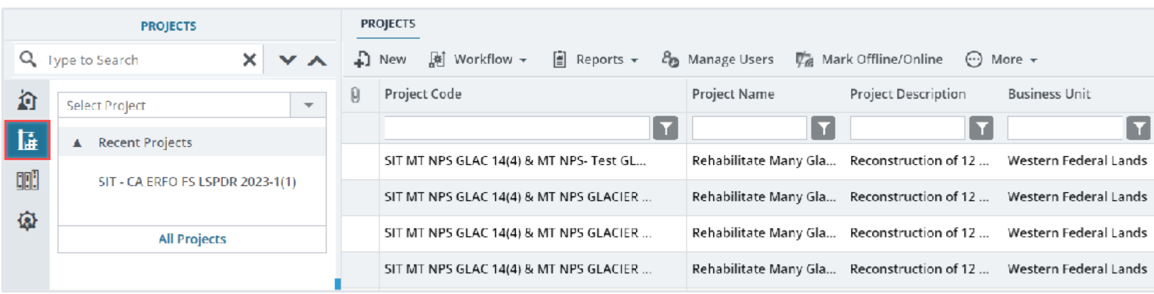


Figure 23: Navigation to Projects Module

2. In the list page, double-click the appropriate project, and then click the project folder to expand it.

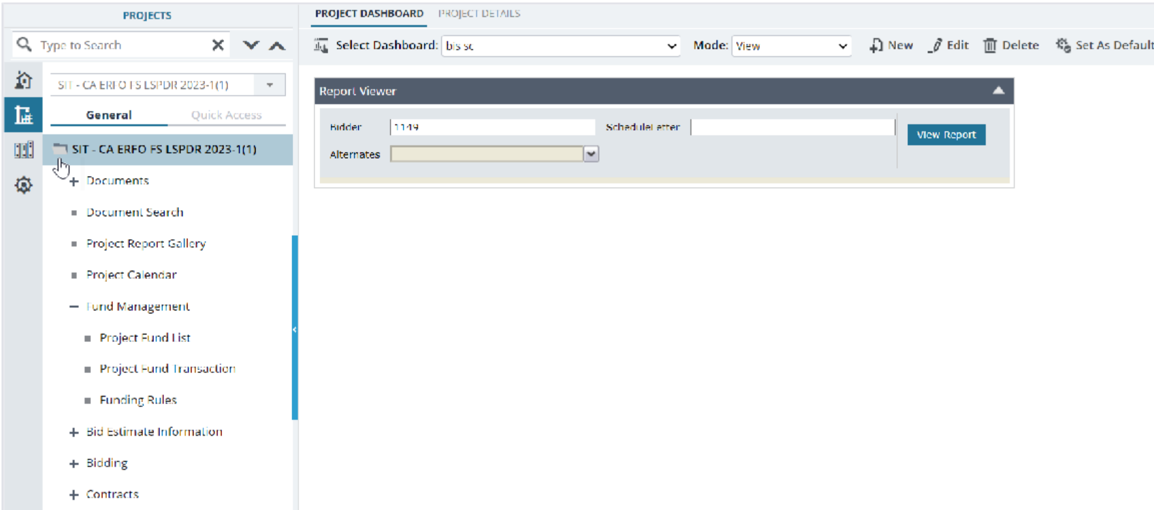


Figure 24:Expanding Projects Folder

3. In the navigation pane, expand Bidding, and then click **Amendment**.
   The **AMENDMENT** list page is displayed.

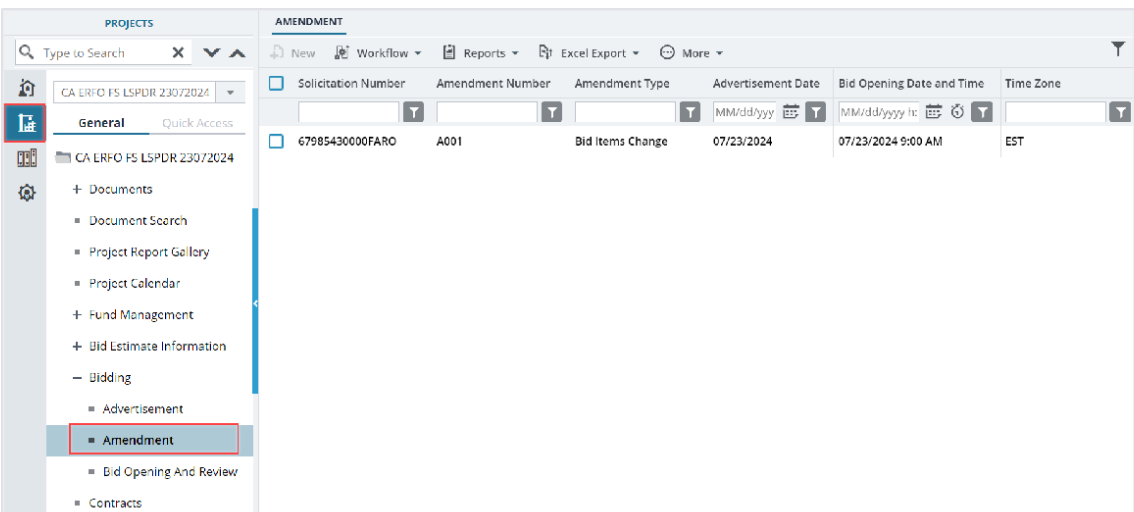


Figure 25: List Page of the Amendment Form

4. In the list page, select the appropriate record in the Draft workflow status, and then click **Select Actions**.

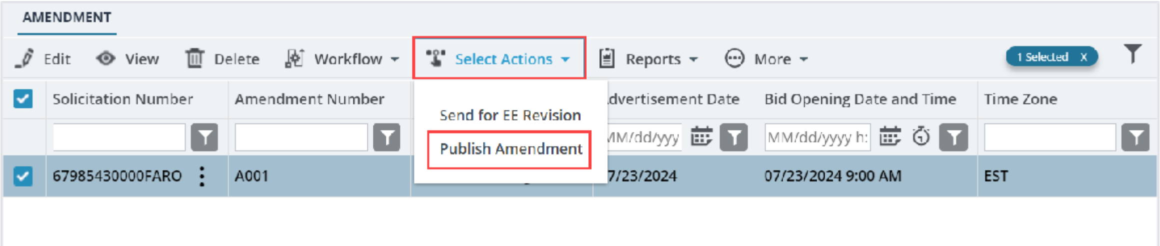


Figure 26: Workflow Action – Publish Amendment

5. Click **Publish Amendment**, and in the Masterworks dialog box, click **OK**.
   The record is moved to the **Amendment Published** workflow status. For more information on the changes after the record is published, refer to Section 3.2.3. Amendment Workflow Status.

3.2.3. Amendment Workflow Status

The following table provides the workflow status (current and subsequent status) of the **Amendment** record.

For information on setting a workflow status to the next status, refer to Section 4.3. Workflow Status Transitions.

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
1	Draft	• Administrator • Acquisitions	Publish Amendment	Amendment Published	To perform this workflow action, ensure the following conditions are met: • The advertisement is not in the Advertisement Canceled workflow status. • The bid opening date and time of the advertisement or the previously published latest amendment have not passed. After the record is moved to the **Amendment Published** workflow status, the following changes occur: • The published amendment is available in the e- Bidding module.

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					• The published amendment cannot be edited. • In the e-Bidding module, the submitted bids are moved to the **Bid in Progress** workflow status and a notification email is sent to all the bidders who have submitted the bid.
			Send for EE Revision	Pending EE Revision	To perform this workflow action, the **Engineer's Estimate Update Required** field must be selected as Yes. You can change the selection of the Engineer's Estimate Update Required field until the record is in the **Draft** workflow status. **Note:** An Amendment record can be resent for EE Revision only once.

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					If there are any further revisions required, then a new Amendment record must created. After the record is moved to the **Pending EE Revision** workflow status, the following changes occur: • The previous Engineer's Estimate in the Final Estimate workflow status is automatically moved to the **Archived** workflow status. • A version of the same Engineer's Estimate record is automatically created in the **Draft** workflow status. • A notification email is sent to the users assigned with the Lead Designer role for the project.

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
2.	Pending EE Revision	<System Automated>	–	EE Updated	Once the newly created Engineer's Estimate version is moved to the **Final Estimate** workflow status, the following changes occur: • The Amendment record is automatically moved to the EE Updated workflow status. • A notification email is sent to the users assigned with the **Acquisitions** role for the project. **Note:** This workflow action cannot be performed manually.
3	EE Updated	• Administrator • Acquisitions	Publish Amendment	Amendment Published	To perform this workflow action, ensure the following conditions are met: • The advertisement is not in the Advertisement Canceled workflow status. • The bid opening date and time of the

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					advertisement or the previously published latest amendment have not passed. After the record is moved to the **Amendment Published** workflow status, the following changes occur: • The published amendment is available in the e-Bidding module. • The published amendment cannot be edited.
			Send for EE Revision	Pending EE Revision	After the record is moved to the **Pending EE Revision** workflow status, the following changes occur: • The previous Engineer's Estimate in the Final Estimate workflow status is automatically moved to the **Archived** workflow status.

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					• A version of the same Engineer's Estimate record is • automatically created in the **Draft** workflow status. • A notification email is sent to the users assigned with the Lead Designer role for the project.

3.3. e –Bidding

The **e-Bidding** module in Masterworks ensures a highly confidential bidding process. Once an advertisement is published, a bid in the Published workflow status is automatically created in the e-Bidding module, soliciting bidders to bid. The bid is displayed in the **CONTRACTOR BIDDING LIST** page.

To access the **e-Bidding** module, bidders must log in to Masterworks using the registered username and password.

Note: To create an account with a Bidder role, refer to Section 3.3.1. Bidder Accounts.

The **e-Bidding** module enables bidders to review published advertisements and bid on them. The bidders can update the bid prices, bid guarantees, and contact information, and submit their bids before the bid opening date and time expires. They can also revise the submitted bids for suggested corrections.

Additionally, published amendments are displayed in the e-Bidding module. The bidder must acknowledge all the amendments before submitting the bid.

Only users with the Bidder role can access all the forms in the e-Bidding module. This ensures the integrity of the entire e-Bidding process and security protocols.

The e-Bidding module enables the bidders to perform the following functions:

- 3.3.3. Submit bid responses
- 3.3.4. Modify submitted bid responses
- 3.3.5. Withdraw bids
- 3.3.6. Acknowledge amendments

3.3.1. Bidder Accounts

You must have an account with the **Bidder** role to submit bids. There are two ways to create a bidder account:

- 3.3.1.1. Self-registering a Bidder Account
- 3.3.1.2. Creating a bidder account by FHWA

After the accounts are created, the users with the Bidder roles can log in to the e-Bidding

module of Masterworks and submit bids.

3.3.1.1. Self-registering a Bidder Account

Overview

You can create your own account to log in to Masterworks and access the e-Bidding module. You can create a new user account through the **New Federal Lands System Bidder link** and enter the personal details. Once you've entered your information and completed the registration, an OTP will be sent to your registered email address. After verifying the email OTP, you'll receive another OTP on your registered phone number. Upon confirming the second OTP, your Masterworks account will be created, and the Bidder role will be automatically assigned to you.

The bidder can now log into Masterworks through a link sent to the email address.

Steps

1. Click the https://fhwatraining1.masterworkslive.com/ link.
2. In the login page, click New Federal Lands System Bidder.

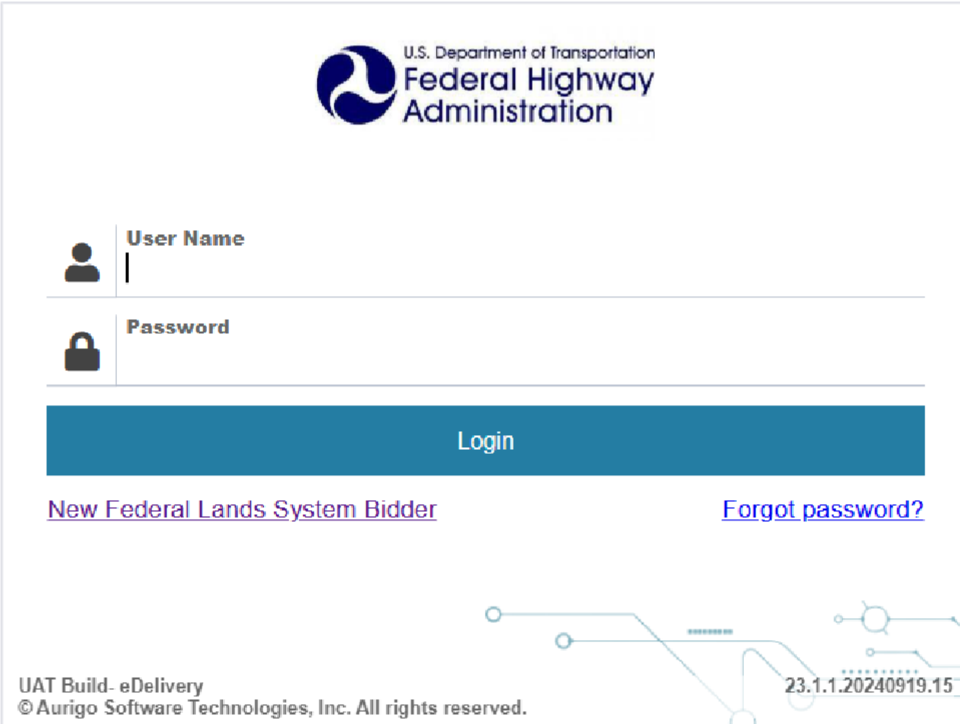


Figure 27: Login Page

The **BIDDER REGISTRATION** page is displayed.

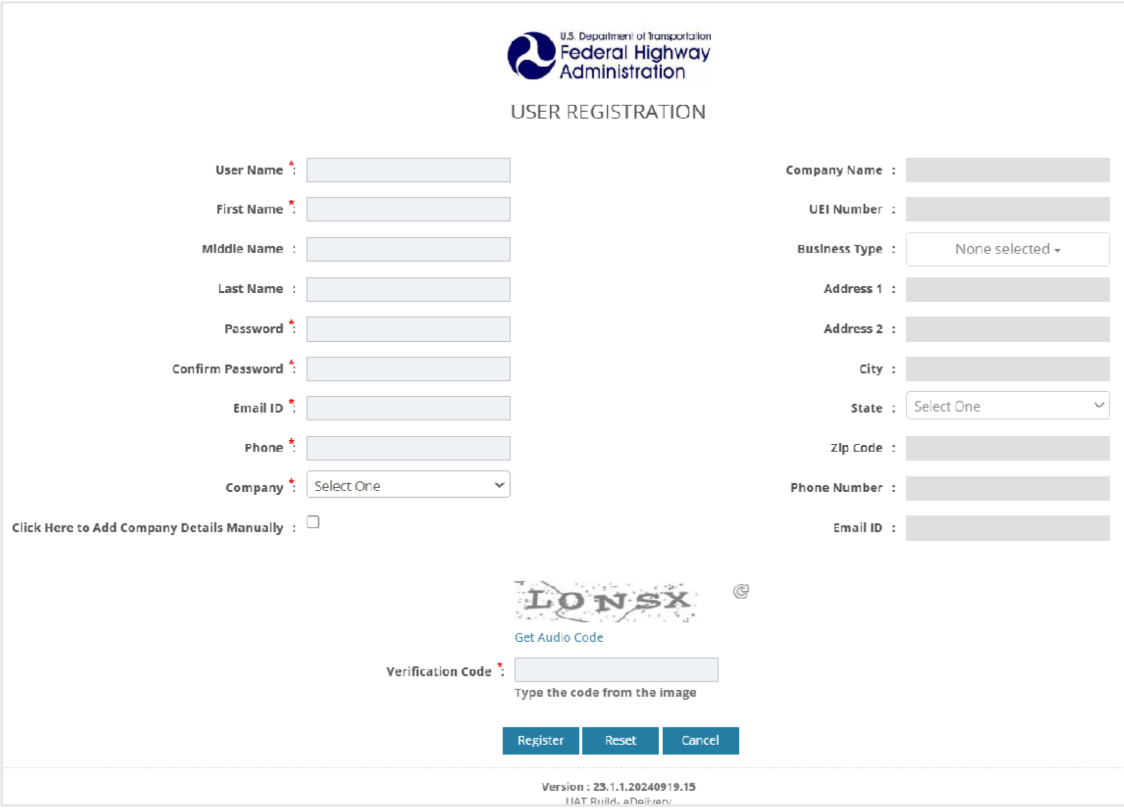


Figure 28: Bidder Registration Page

3. Provide the appropriate information in the fields, as described in the following table:

Field Name	Description
User Name	Enter a unique identification name for the user account. The user name is used to login to the application.
First Name	Enter the first name of the user.
Middle Name	Enter the middle name of the user.
Last Name	Enter the last name of the user.
Password	Enter a password for the user account.
Confirm Password	Enter the same password as entered in the Password field to verify that you have entered correct password.
Email ID	Enter the email address of the user.
Country	Enter the name of the country where the user resides.
Phone	Enter the mobile number of the user. **Note:** Ensure the format of the phone number is xxx- xxx-xxxx
Company	Select the name of the company. Available options are active companies listed in the Contractors library catalog.

Field Name	Description
	Note: The contractors list will not display the names of sub-contractors. Upon selecting the company, the following fields are automatically updated: • Contact • UEI Number • Business Type • Address Line 1 and Line 2 • City, State, Zip Code • Phone Number • Email ID
Click Here to Add Company Details Manually	Select the check box if the company name does not exist in the Company selection field. **Note:** If the check box is selected, then the Company field is hidden.
Company Name	Enter the company name of the user. **Note:** If the company name is being entered manually, then all other details of the company, such as the Contact, UEI Number, Business Type, Address, etc. must be entered manually.
Contact	By default, displays the details based on the selected company. However, you can edit the contact details if you are entering the company details manually.
UEI Number	By default, displays the details based on the selected company. Optionally, you can edit the contact details if you are entering the company details manually.
Business Type	By default, displays the details based on the selected company. Optionally, select the appropriate business type.
Address Line 1, Address Line 2	By default, displays the details based on the selected company. Optionally, enter the address of the user.
City	By default, displays the details based on the selected company. Optionally, enter the name of the city where the user resides.
State	By default, displays the details based on the selected company. Optionally, enter the name of the state where the user resides.

Field Name	Description
Zip Code	By default, displays the details based on the selected company. Optionally, enter the zip code for the address where the user resides.
Phone Number	By default, displays the details based on the selected company. Optionally, enter the mobile number of the company.
Email ID	By default, displays the details based on the selected company. Optionally, enter the email address of the company.

4. In the **Verification Code** field, enter the verification code as displayed.
   Alternatively, perform the following steps, as applicable:
   1. To change the verification code, click
   2. To enable the audio code, click Get Audio Code.
5. Click **Register**.
   Upon clicking **Register**, a page to enter the OTP is displayed.
   Alternatively, perform the following steps, as applicable:
   - To delete all the information entered in the respective fields, click **Reset**.
   - To cancel the registration process, click **Cancel**.
6. Enter the OTP that is sent to the registered email address.
   Note: You can resend the OTP after 9- seconds if you are unable to find the initially sent OTP.
7. Enter the OTP that is sent to the registered phone number.
   Note: Masterworks automatically approves the user with the Bidder role.
   - An external user account with Bidder role is created in the application.
   - If a contractor registers through a manually entered company, a record for the contractor gets created in the Contractor Details library catalog.
   - An email is sent to the registered email address of the user with the link to log in to the Masterworks application.
   - Users wth the Bidder role have access only to the **e-Bidding** module.

3.3.1.2. Creating a Bidder Account by FHWA

Overview

Only users assigned with the Administrator role can create user accounts with the Bidder role.

Steps

1. In the module menu, click **Administration**.
   The **ADMINISTRATION** page is displayed.

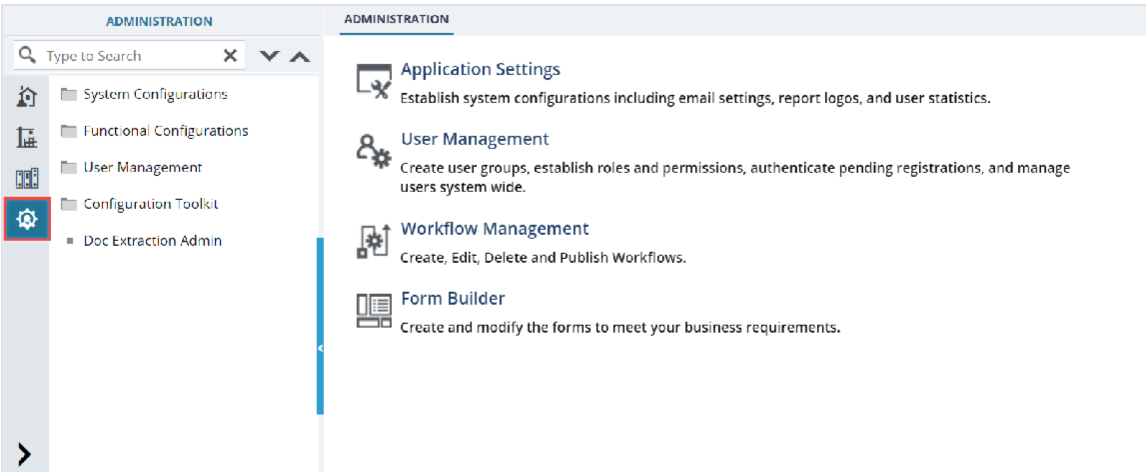


Figure 29: Administration Page

2. In the navigation pane, expand **User Management**, and then click **User Accounts**.

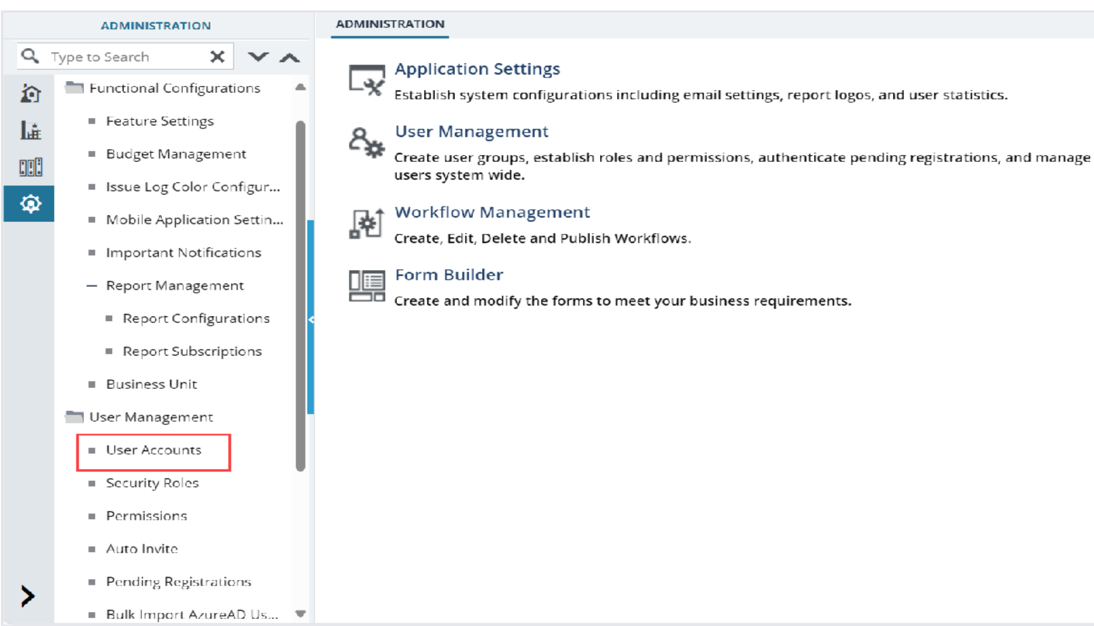


Figure 30: Navigation to User Accounts

The **USER ACCOUNTS** list page is displayed.

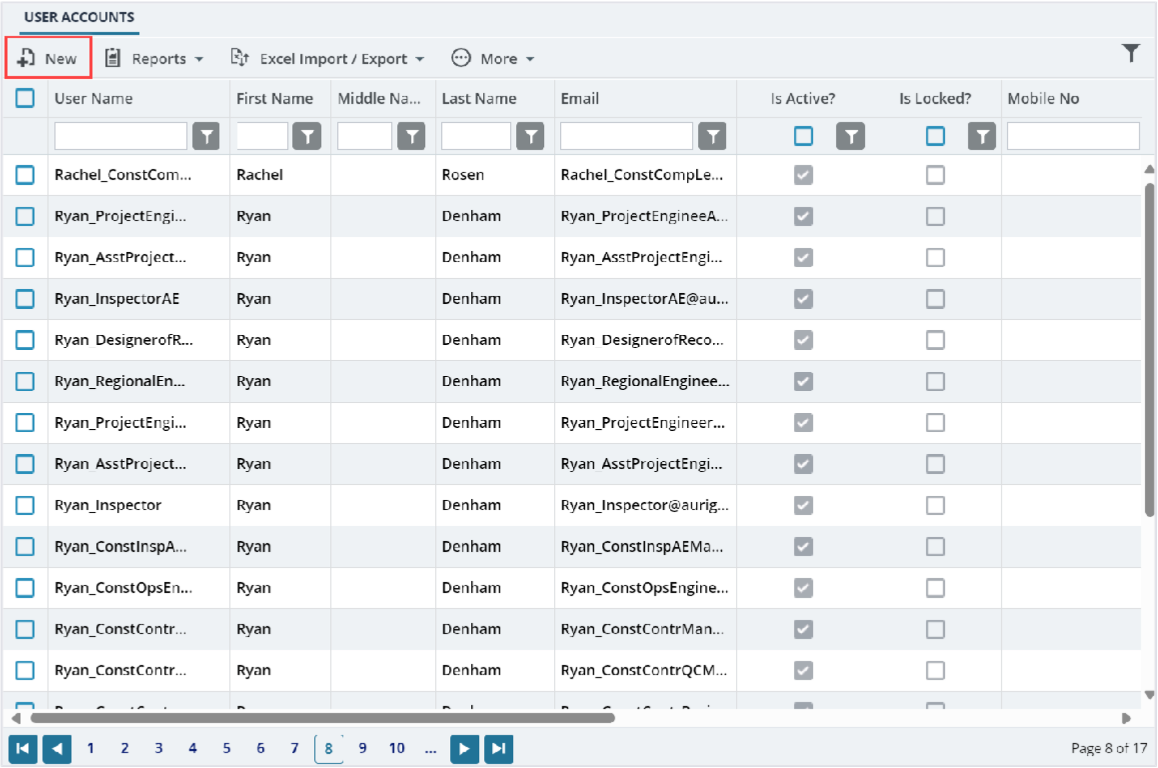


Figure 31: List Page of User Accounts

3. Click **New**.
   The **ADD USER** page is displayed.

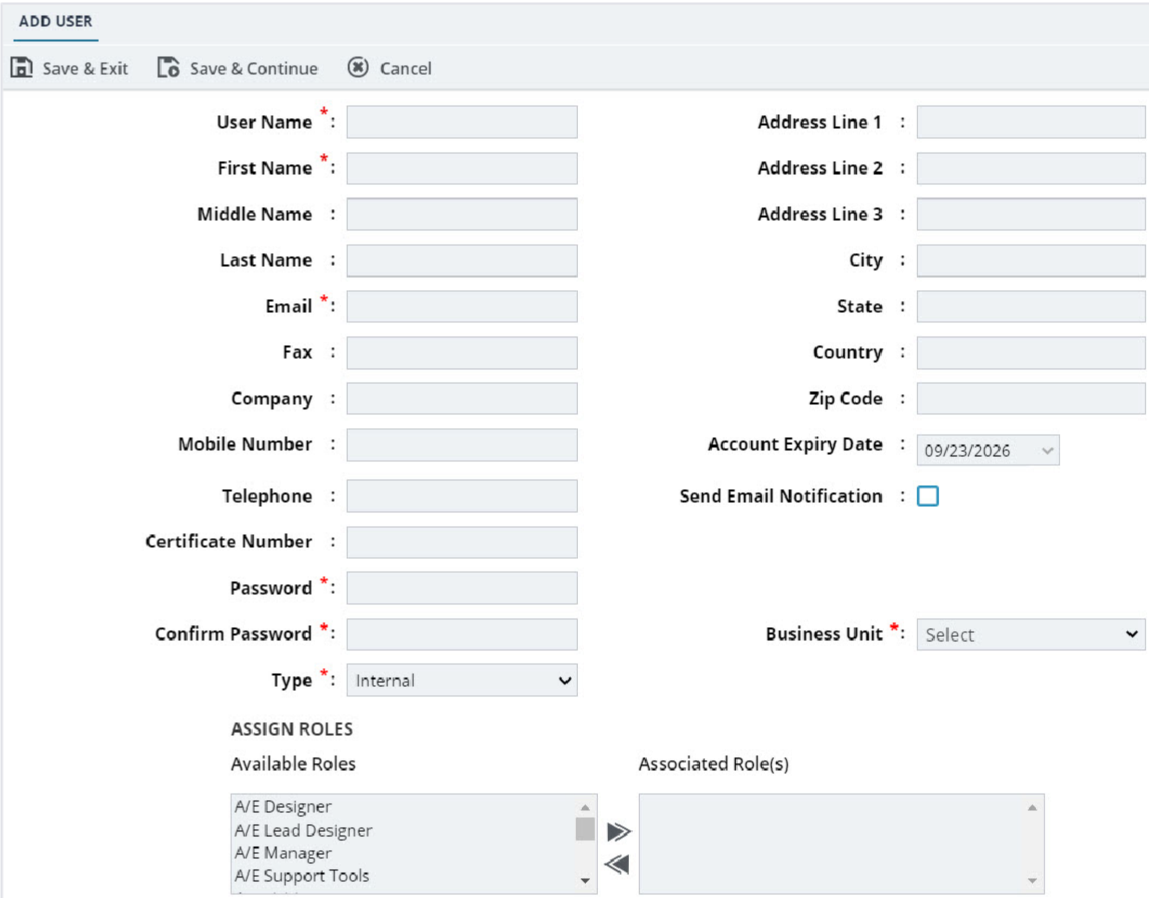


Figure 32: Add User Page

4. Provide the appropriate information in the fields, as described in the following table:

Field Name	Description
User Name	Enter a unique identification name for the user account. The user name is used to log in to the application. **Note:** Once the record is saved, you cannot edit the user name.
First Name	Enter the first name of the user.
Middle Name	Enter the middle name of the user.
Last Name	Enter the last name of the user.
Email	Enter the email address of the user.
Fax	Enter the fax number of the user for facsimile communication.
Company	Enter the company name of the user.
Mobile Number	Enter the mobile number of the user.
Telephone	Enter the telephone number of the user.
Certificate Number	Enter the access certificate number assigned to the user.

Field Name	Description
Type	From the Type drop-down list, select External.
Password	Enter a password for the user account. The password must adhere to the settings as defined in the **AUTHENTICATION & LOGIN SETTINGS** page.
Confirm Password	Enter the same password as entered in the Password field to verify that you have entered the correct password.
Address Line 1, Address Line 2, and Address Line 3	Enter the address of the user.
City	Enter the name of the city where the user resides.
State	Enter the name of the state where the user resides.
Country	Enter the name of the country where the user resides.
Zip Code	Enter the zip code for the address where the user resides.
Account Expiry Date	Enter a date until which the account is valid. The user is denied access to the application after this date.
Send Email Notification	Select the business unit to assign to the user. Available options are Federal Land Highways, Eastern Federal Lands, etc.
Business Unit	The drop-down list displays the active business units defined in the Business Unit form of the Administration module.

5. To assign the Bidder role to the user, in the **ASSIGN ROLES** section, perform the following steps:
   a. In the **Available Roles** box, click **Bidder**.
   b. Click ⯈.
      The **Bidder** role is displayed in the **Associated Role(s)** box.
      The consolidated set of permissions for this role associated with the user account are made available to the user.
6. Click **Save**.
   The user account is created with the Bidder role.

3.3.2. Logging into Masterworks using Credentials – Bidder

Prerequisites

You can access Masterworks using any modern web browser.
It is preferable to use Google Chrome or Microsoft Edge.

Overview

You can log in to Masterworks using your network credentials.

Steps

1. Click the https://fhwamasterworkslive.com/ link.
   The login page is displayed.

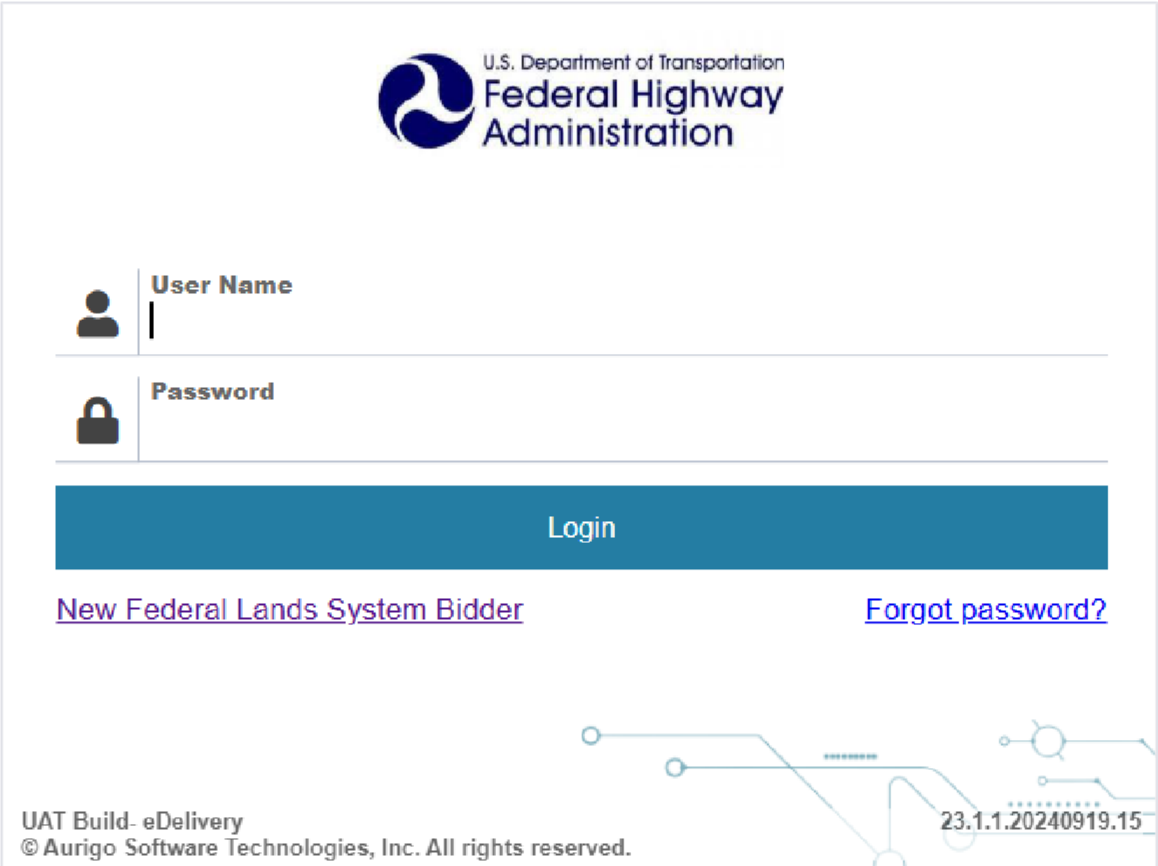


Figure 33: Login Page

2. Enter the **User Name** and **Password**.
3. Click **Login**.

3.3.3. Submitting a Bid Response

Prerequisites

The bid opening date and time have not passed.

Overview

The e-Bidding module enables you to view the advertised bids and submit bid responses.

Steps

1. Log in to Masterworks using your registered username and password.
   The **CONTRACTOR BIDDING LIST** page displays the list of bids assigned to you.

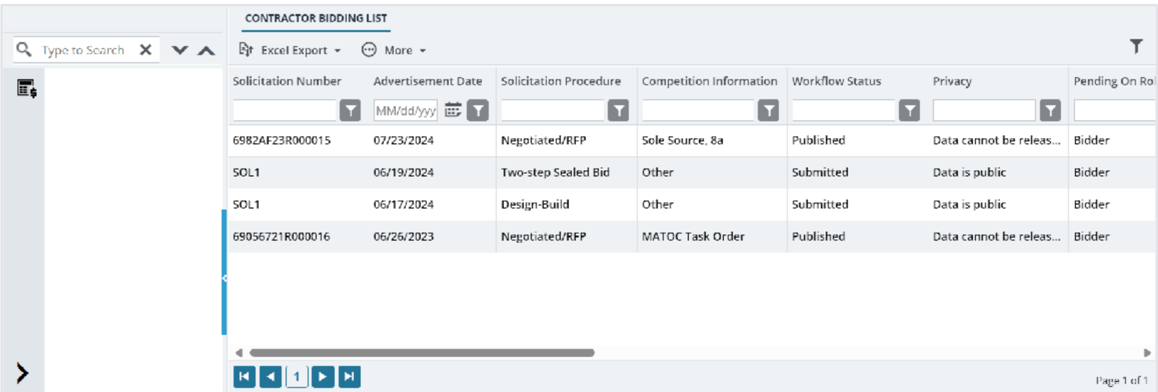


Figure 34: Contractor Bidding List Page

2. To respond to an advertised bid, in the list page, perform the following steps:
   a. Select the appropriate record in the **Published** workflow status, and then click **Select Actions**.

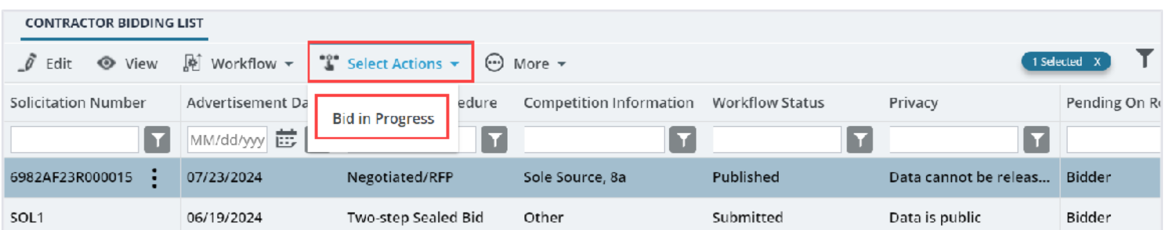


Figure 35: Workflow Action – Bid in Progress

   b. Click **Bid in Progress**, and in the Masterworks dialog box, click **OK**.
      The record is moved to the **Bid in Progress** workflow status.

3. Select the bid, and then click **Edit**.
   The **CONTRACTOR BIDDING LIST** details page is displayed.

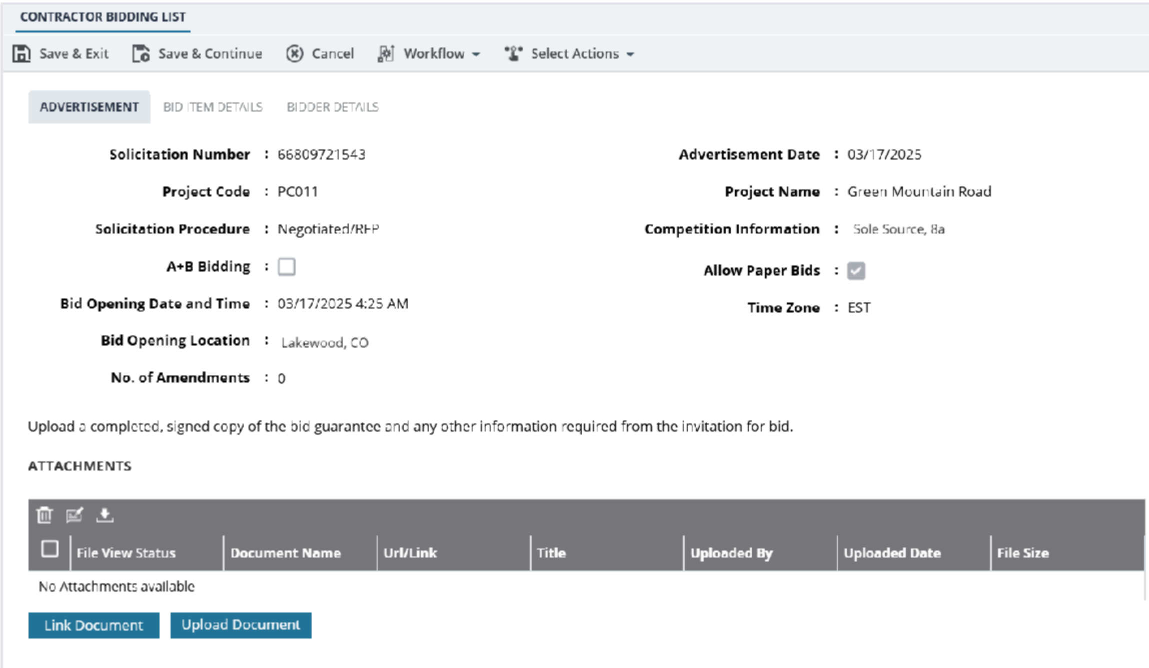


Figure 36: Contractor Bidding List

In the **CONTRACTOR BIDDING LIST** page, the **ADVERTISEMENT** tab displays the following information:

Field Name	Description
Solicitation Number	The unique identifier of the published advertisement.
Project Code	The code of the project.
Solicitation Procedure	The solicitation procedure as defined in the published advertisement.
A+B Bidding	The check box selection as defined in the published advertisement.
Bid Opening Date and Time	The date and time as defined in the published advertisement or the latest published amendment, as applicable.
Bid Opening Location	The location as defined in the published advertisement.
No. of Amendments	The number of amendments published for the associated published advertisement.
Advertisement Date	The date when the advertisement was published.
Project Name	The name of the project.
Competition Information	The competition information as defined in the published advertisement.
Allow Paper Bids	The check box selection as defined in the published advertisement or the latest published amendment, as applicable.
Time Zone	The time zone as defined in the published advertisement.

4. If any amendment is made to the published advertisement, then a hyperlink text is displayed. In the **ADVERTISEMENT** tab, click the hyperlink Click here to acknowledge Amendments before bid submission.
   For information on acknowledging an amendment, refer to Section 3.3.6. Acknowledging Amendment.

Note: You must acknowledge all available amendments to submit a bid response.

5. To edit the bidding details, perform the following steps:
   a. Click the **BID ITEM DETAILS** tab.

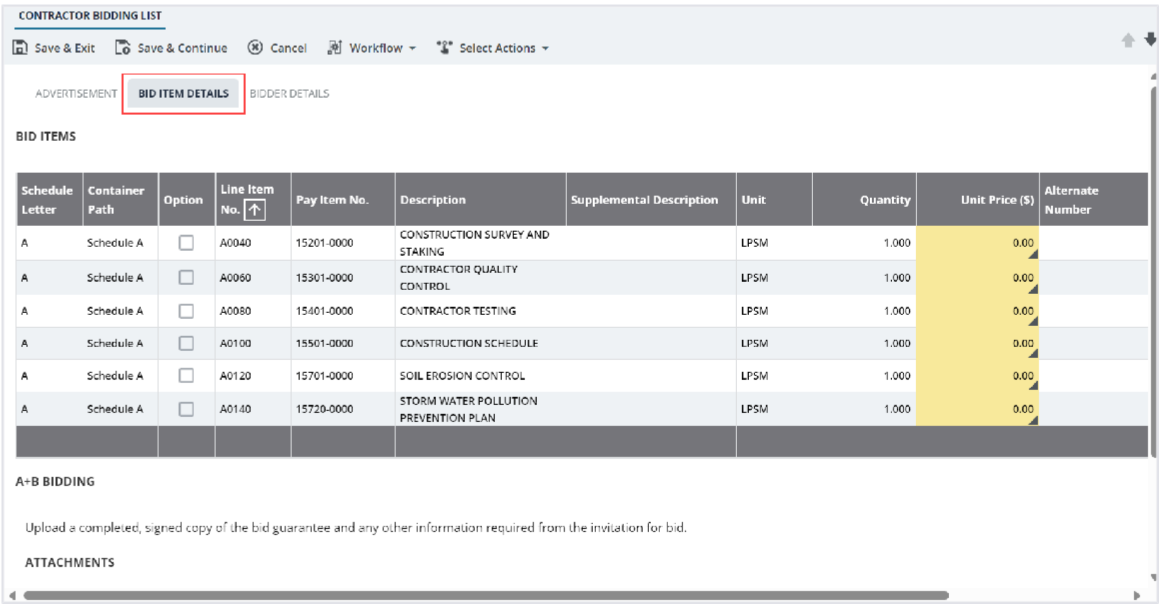


Figure 37: Bid Item Details Tab

The following information is displayed:

Section	Column Name	Description
BID ITEMS	Schedule Letter	The schedule as defined in the final engineer's estimate.
	Container Path	The container name as defined in the final engineer's estimate.
	Option	The check box selection as defined in the final engineer's estimate.
	Line Item No	The line item number as defined in the final engineer's estimate.
	Pay Item No	The pay item number from the final engineer's estimate.
	Description	The description of the Pay Item No from the final engineer's estimate.

Section	Column Name	Description
	Supplemental Description	The supplemental description of the Pay Item No as defined in the final engineer's estimate.
	Unit	The unit of the Pay Item No from the final engineer's estimate.
	Quantity	The quantity of the Pay Item No as defined in the final engineer's estimate. **Note:** The quantity of the item is non-editable if the **Force Quantity** field is selected for the item in the **Standard Items Table** catalog of the library. You can still save the bid without entering quantities.
	Alternate Number	The sub container name of the Pay Item No as defined in the final engineer's estimate.
	Change Type	The value is displayed based on the changes done in the latest final engineer's estimate. Available options are New and Update. • If an item is added through amendment, then the column displays New for the respective item row. • If the quantity of an item is modified through amendment, then the column displays Update for the respective item row.
A+B BIDDING	Schedule Letter	The schedule as defined in the published advertisement.
	Minimum Number of Days	The minimum number of days as defined in the published advertisement.
	Maximum Number of Days	The maximum number of days as defined in the published advertisement.

Note: The A+B BIDDING section is available only if the A+B Bidding check box is selected in the published advertisement.

b. In the BID ITEMS section, in the Unit Price ($) column of the appropriate item row, click and enter the unit price for the bid item.

Note:

- Upon entering the value in the **Unit Price ($)** column for an item row, the Amount ($) column displays the value for the respective item row.

- The unit price of the item is non-editable if the **Force Unit Price** field is selected for the item in the **Standard Items Table** catalog of the library. You can still save the bid without entering the unit price.

c. In the **A+B BIDDING** section, in the **(A+B) Number of Days** * column of the appropriate item row, click and enter the appropriate number of days.

Note: You must enter the value within the range of the minimum and maximum number of days.

6. To edit the bidder details, perform the following steps:
   a. Click the **BIDDER DETAILS** tab.

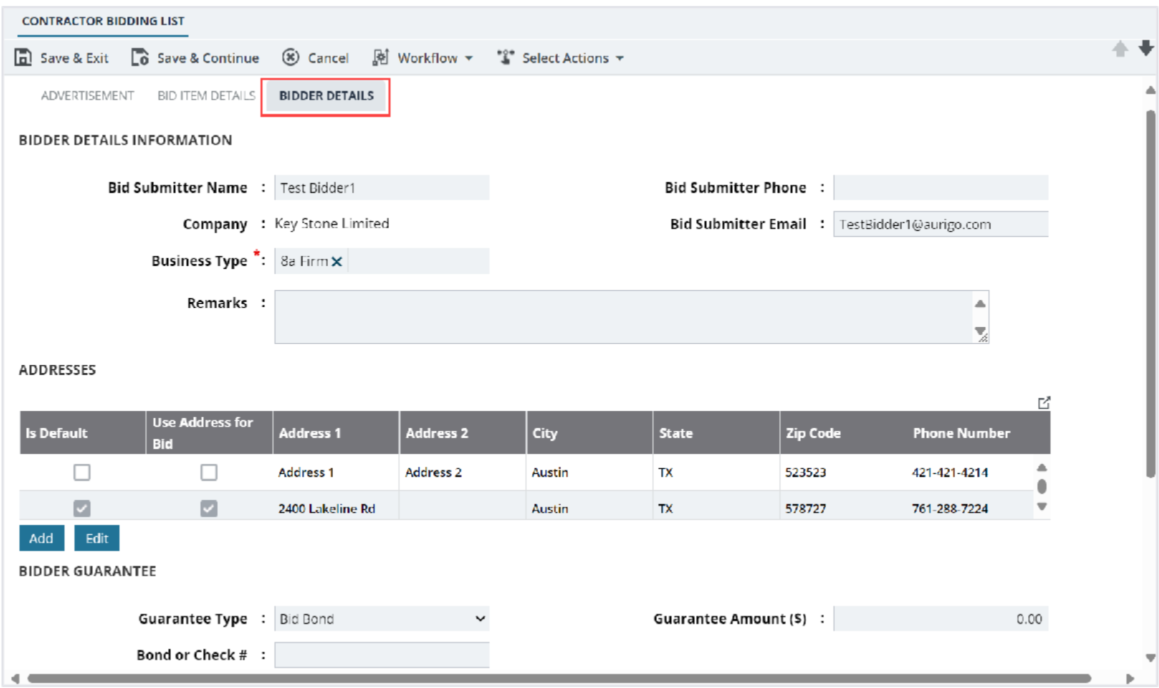


Figure 38: Bidder Details Tab

Section	Field Name	Description
BIDDER DETAILS INFORMATION	Bid Submitter Name	The first name and last name of the logged-in user. Alternatively, you can modify the name as necessary.
	Company	The company of the logged-in user. This company name is displayed in the **Bid Opening and Review** form.
	Business Type	The business type defined in the **Contractor Details** catalog of the library for the company of the logged-in user.

Section	Field Name	Description
		Alternatively, you can modify the business types. Available options are 8a Firm, Emerging Small Business, etc.
	Bid Submitter Phone	The phone number of the logged-in user as defined while creating the user account.
	Bid Submitter Email	The email address of the logged-in user as defined while creating the user account. Alternatively, you can manually enter the email address.
ADDRESSES	Is Default	The check box selection as defined in the **Contractor Details** catalog of the library for the company addresses of the logged-in user.
	Use Address for Bid	The check box selection as defined in the **Contractor Details** catalog of the library for the company addresses of the logged-in user.
	Address 1	The address as defined in the **Contractor Details** catalog of the library for the company addresses of the logged-in user.
	Address 2	The address as defined in the **Contractor Details** catalog of the library for the company addresses of the logged-in user.
	City	The city as defined in the Contractor Details catalog of the library for the company addresses of the logged-in user.
	State	The state as defined in the Contractor Details catalog of the library for the company addresses of the logged-in user.
	Zip Code	The postal code as defined in the Contractor Details catalog of the library for the company addresses of the logged-in user.
	Phone Number	The phone number as defined in the Contractor Details catalog of the library for the company addresses of the logged-in user.

b. In the **BIDDER DETAILS INFORMATION** section, in the Remarks field, enter any remarks about the bidder.

c. To manage addresses, in the **ADDRESSES** section, perform the following steps, as applicable:

- To add an address, perform the following steps:

i. Click **Add**.
The New Addresses dialog box is displayed.

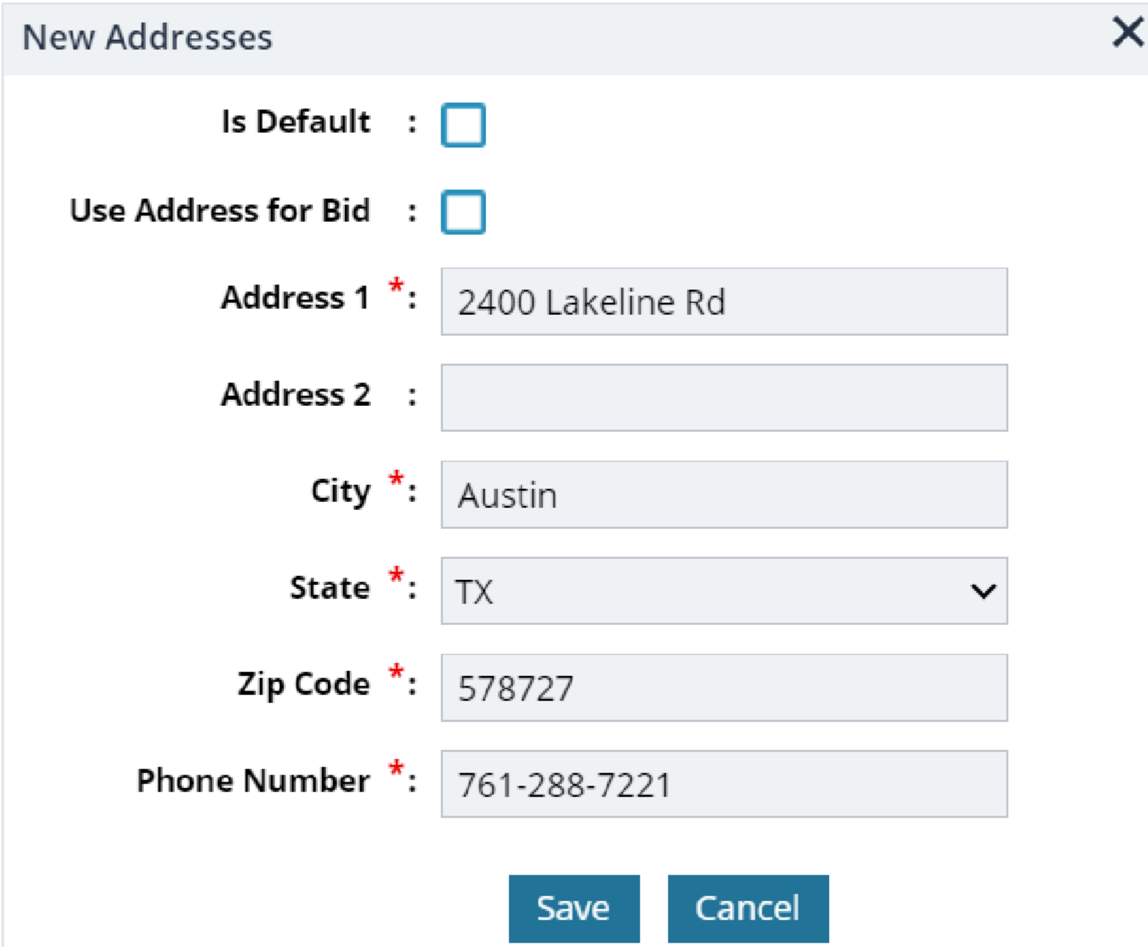


Figure 39: New Addresses Dialog Box

ii. Provide the appropriate information in the fields, as described in the following table:

Column Name	Description
Is Default	Select the check box to ensure the address is marked as default address for the contractor. **Note:** • If this check box is selected, the same address is updated in the Contractor Details catalog of the library. • If you mark more than one address as default, then an error message is displayed while saving the bid response.
Use Address for Bid	Select the check box to ensure the address is used for bidding.

Column Name	Description
	Note: • The default address is automatically selected as Use Address for Bid. However, you can select any other address by selecting this check box. • If you mark more than one address as for bidding, then an error message is displayed while saving the bid response.
Address 1	Enter the address.
Address 2	Enter the address.
City	Enter the city.
State	From the drop-down list, select the state. Available options are AZ, TX, LA, AK, etc. The drop-down list displays the active states defined in the **State/Territory** catalog of the library.
Zip Code	Enter the postal code of the address.
Phone Number	Enter the phone number for the address.

iii. Click **Save**.

- To edit an address, perform the following steps:
  i. Click **Edit**.
  The **Edit Addresses** dialog box is displayed.

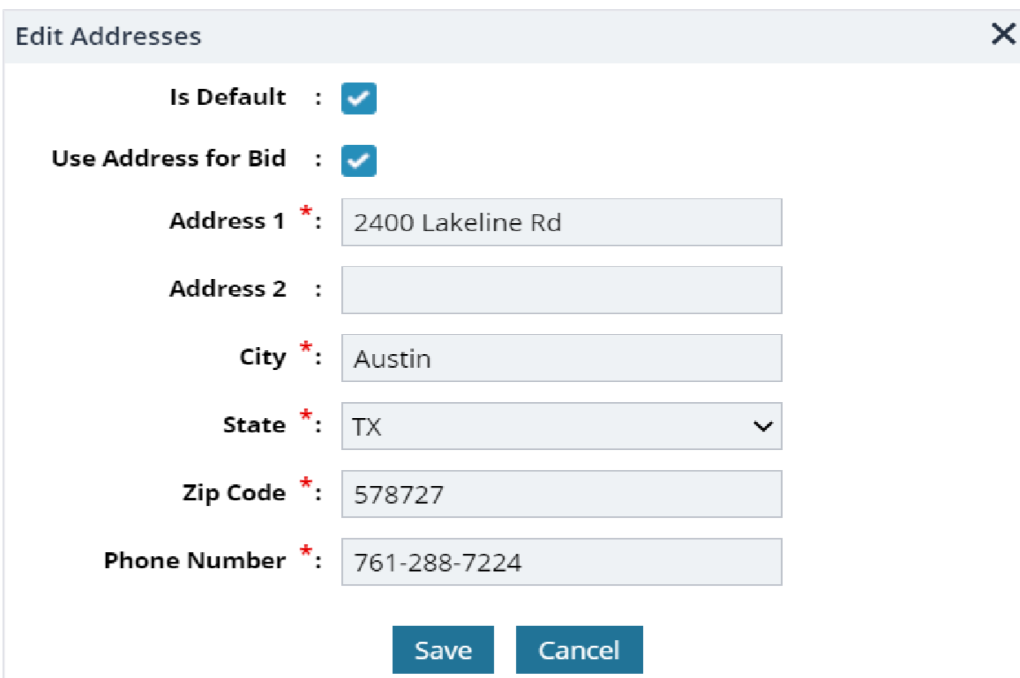


Figure 40: Edit Addresses Dialog Box

ii. Make the necessary changes.

iii. Click **Save**.

d. In the **BIDDER GUARANTEE** section, provide the appropriate information in the fields, as described in the following table:

Field Name	Description
Guarantee Type	From the drop-down list, select the guarantee type. Available options are Bid Bond, Cashiers Check, Irrevocable Letter of Credit, etc. The drop-down list displays the active guarantee types defined in the **Guarantee Type** catalog of the library.
Bond or Check	Enter a unique alphanumeric identifier for the guarantee amount that is submitted along with the bid.
Guarantee Amount ($)	Enter the appropriate guarantee amount for the bid.

7. In the **ATTACHMENTS** section, upload or link files related to the bid guarantee. For information on attachments, refer to Section 4.1. Attachments.
8. Click **Save & Exit** to save the bid response details.
   Alternatively, click **Save & Continue** to save the added details and continue adding more details.
   Click **Cancel** to exit the page.
9. To **submit** the bid, perform the following steps:
   a. In the **CONTRACTOR BIDDING LIST** page, select the appropriate record in the Bid in Progress workflow status, and then click **Select Actions**.

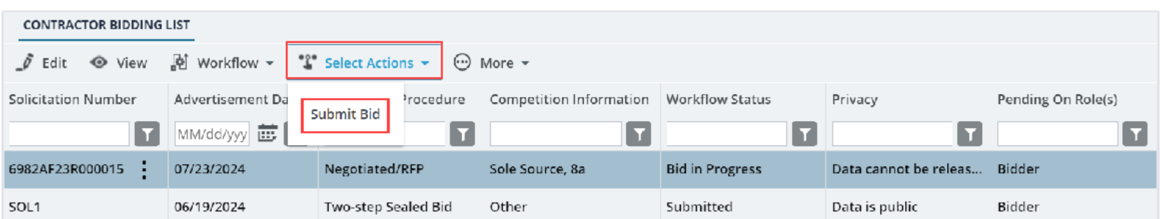


Figure 41: Workflow Action - Submit Bid

   b. Click **Submit Bid**, and in the Masterworks dialog box, click **OK**.
   The bid response is submitted, and the record is moved to the Submitted workflow status.

3.3.4. Modifying a Submitted Bid Response

Prerequisites

- The bid is available in the **Submitted** workflow status.
- The bid opening date and time have not passed.

Steps

1. In the **CONTRACTOR BIDDING LIST** page, select the appropriate record in the Submitted workflow status, and then click **Select Actions**.

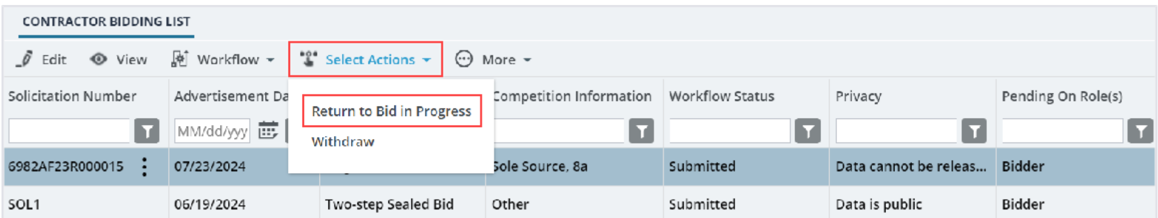


Figure 42: Workflow Action – Return to Bid in Progress

2. Click **Return** to **Bid in Progress**, and in the Masterworks dialog box, click **OK**.
   The record is moved to the **Bid in Progress** workflow status.
3. Select the bid, and then click **Edit**.
   The **CONTRACTOR BIDDING LIST** details page is displayed.

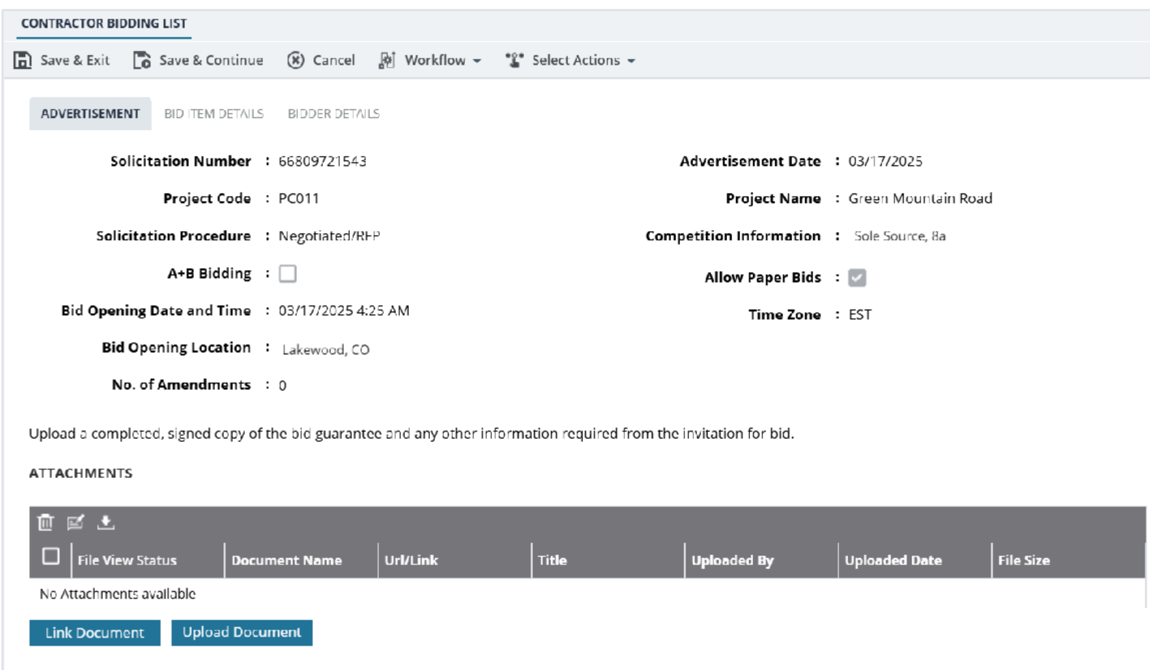


Figure 43: Contractor Bidding List Page

4. To edit the bidding details, refer to Section 3.3.3. Submitting a Bid Response.
5. To edit the bidder details, refer to Section 3.3.3. Submitting a Bid Response.
6. 6.In the **ATTACHMENTS** section, upload or link files related to the bid guarantee. For information on attachments, refer to Section 4.1. Attachments.
7. Click **Save & Exit** to save the bid response details.
   Alternatively, click **Save & Continue** to save the added details and continue adding more details.
   Click **Cancel** to exit the page.

3.3.5. Withdrawing a Bid

Prerequisites

- The bid is available in the **Submitted** workflow status.
- The bid opening date and time have passed.

Steps

1. In the **CONTRACTOR BIDDING LIST** page, select the appropriate record in the Submitted workflow status, and then click Select **Actions**.

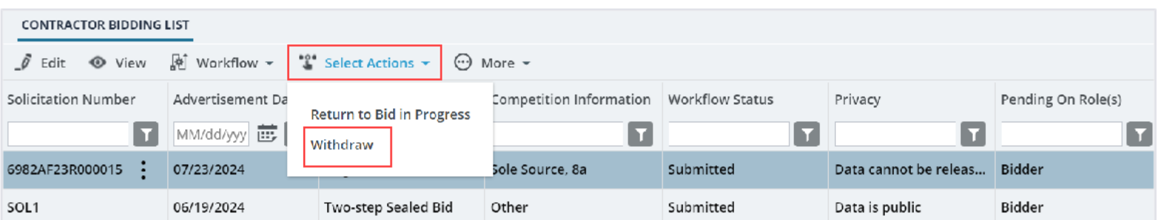


Figure 44: Workflow Action – Withdraw

2. Click **Withdraw**, and in the Masterworks dialog box, click **OK**. The record is moved to the **Withdrawn** workflow status.
   For more information on the changes after the bid is withdrawn, refer to Section 3.3.7. e-Bidding Workflow Status.

3.3.6. Acknowledging Amendment

Prerequisites

- In the **CONTRACTOR BIDDING LIST** page, the value in the **No of Amendments** field for the bid must be greater than 0.
- The bid opening date and time have not passed.

Overview

After the bid is submitted, if any amendments are issued to the published advertisement, Masterworks automatically moves the corresponding bid to the **Bid in Progress** workflow status.

Note: You must acknowledge all the available amendments to submit a bid.

Steps

1. In the **CONTRACTOR BIDDING LIST** page, select the appropriate record in the Bid in Progress workflow status, and then click Amendment.
   Alternatively, perform the following steps:
   a. In the **CONTRACTOR BIDDING LIST** page, select the appropriate record in the **Bid in Progress** workflow status, and then click **Edit**.
      The **CONTRACTOR BIDDING LIST** page displays the number of amendments available and the hyperlink text.

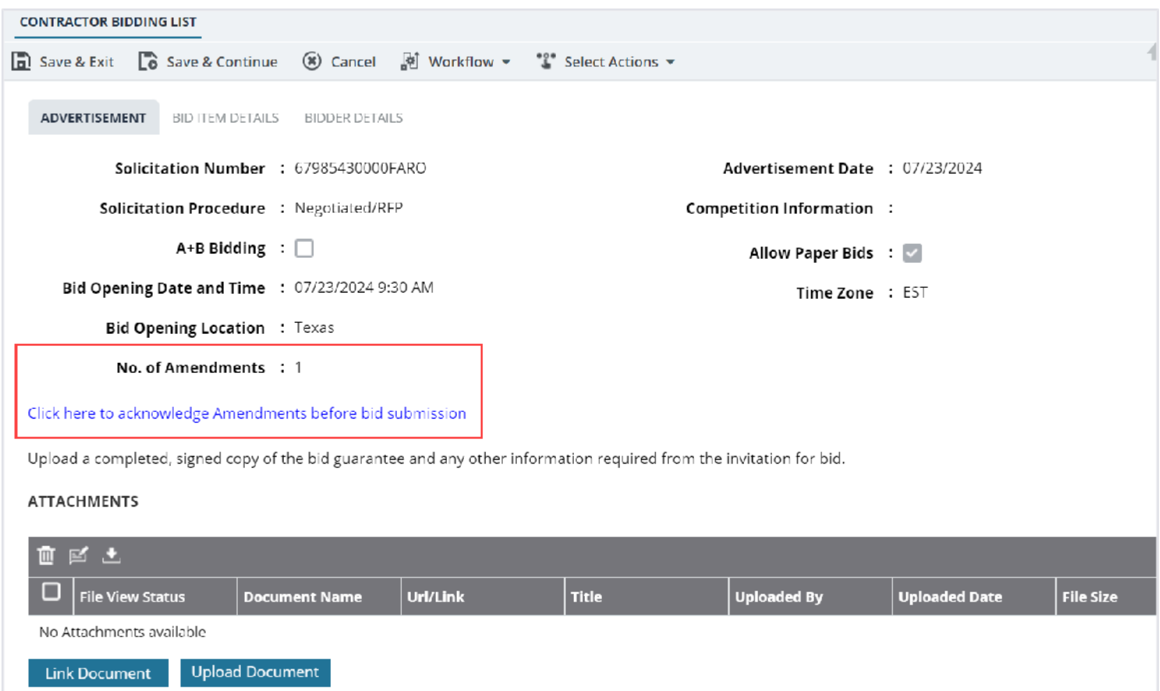


Figure 45: Contractor Bidding List

b. In the **ADVERTISEMENT** tab, click the hyperlink **Click here to acknowledge Amendments before bid submission**.
   The **EBIDDING AMENDMENT** list page displays the amendments associated with the submitted bid.

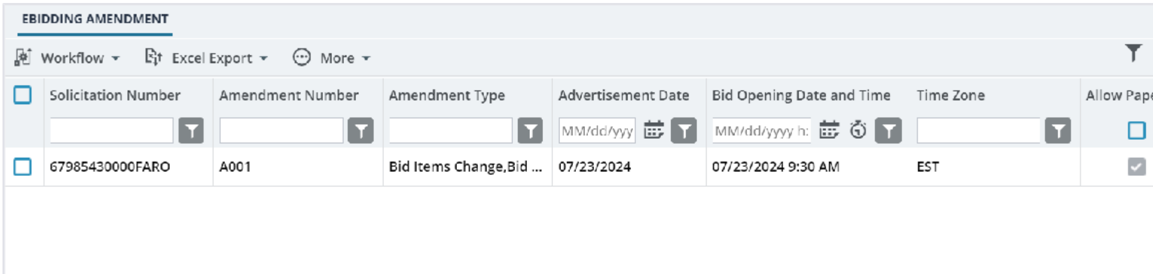


Figure 46: E-bidding Amendment List page

2. To keep yourself updated on the modifications made to the advertised bid and submit a well-analyzed bid response, you must view the amendment before acknowledging it.
   In the list page, select the appropriate record in the **New** workflow status, and then click **View**.
   The **EBIDDING AMENDMENT** page is displayed.

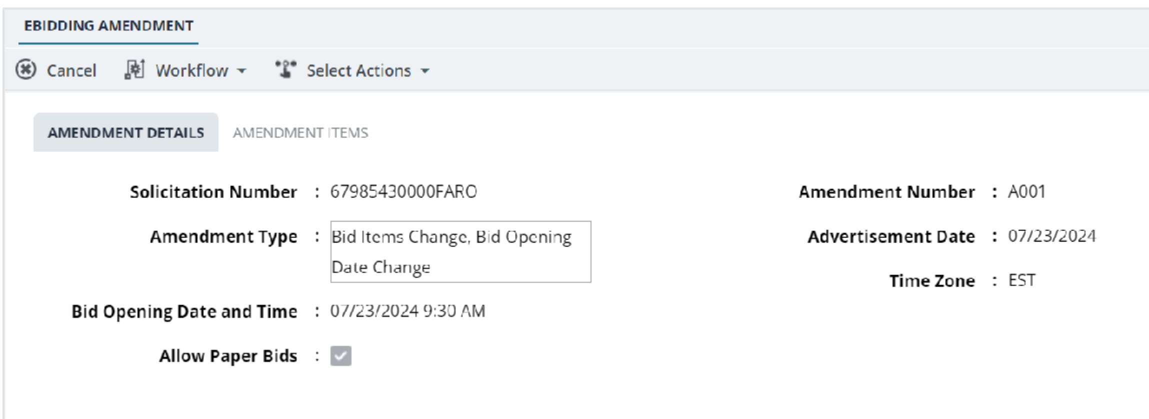


Figure 47: EBidding Amendment Details Page

The **AMENDMENT DETAILS** tab displays the following information:

Field Name	Description
Solicitation Number	The solicitation number of the published advertisement.
Amendment Type	The type of amendment as defined in the amendment.
Bid Opening Date and Time	The date and time as defined in the published amendment.
Allow Paper Bids	The check box selection as defined in the published amendment.
Amendment Number	The unique identifier of the published amendment.
Advertisement Date	The advertisement date as defined in the published advertisement.
Time Zone	The time zone as defined in the published advertisement.

3. To view the amendment items, click the **Amendment Items tab**.

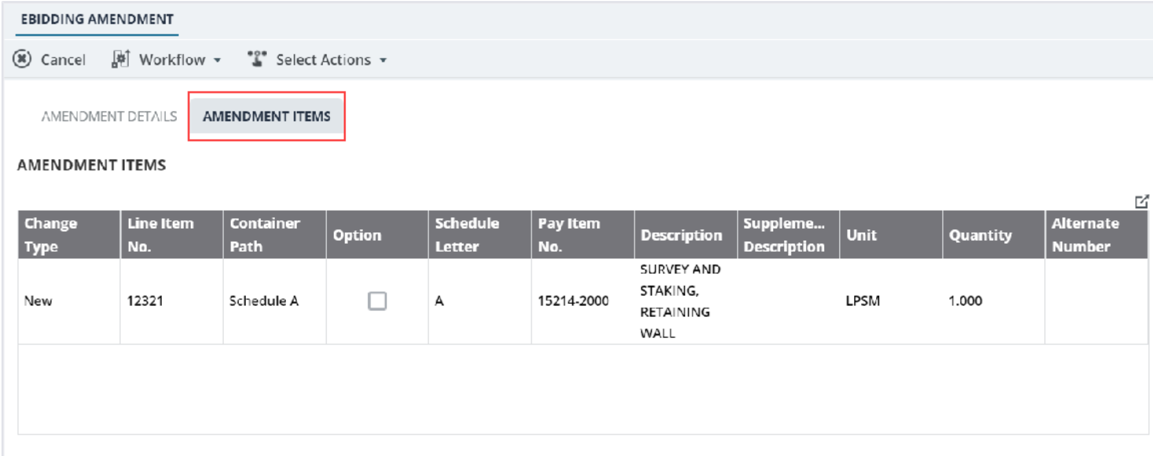


Figure 48: Amendment Items Tab

Column Name	Description
Change Type	Based on the change type of the pay item, the value is displayed. • New: A new pay item is added. • Update: The quantity of the existing pay item is modified. • Delete: The existing pay item is deleted.
Line Item No	The line item number as defined in the final engineer's estimate.
Container Path	The name of the container as defined in the final engineer's estimate.
Option	The check box selection is displayed based on whether the **Pay Item No** is defined as Base or Option in the final engineer's estimate. If a **Pay Item No** is defined as **Option**, then the check box adjacent to the respective pay item is selected.
Schedule Letter	The schedule letter as defined for the container in the final engineer's estimate.
Pay Item No	The pay item number from the final engineer's estimate.
Description	The description of the **Pay Item No** from the final engineer's estimate.
Supplemental Description	The additional description of the **Pay Item No** as defined in the final engineer's estimate.
Unit	The unit of the **Pay Item No** from the final engineer's estimate.
Quantity	The quantity of the **Pay Item No** as defined in the final engineer's estimate.
Unit Price ($)	The unit price of the **Pay Item No** as defined in the final engineer's estimate.
Alternate Number	The sub container name of the **Pay Item No** as defined in the final engineer's estimate.

4. To acknowledge the amendment, perform the following steps:

a. In the list page, select the appropriate record in the New workflow status, and then click **Select Actions.**

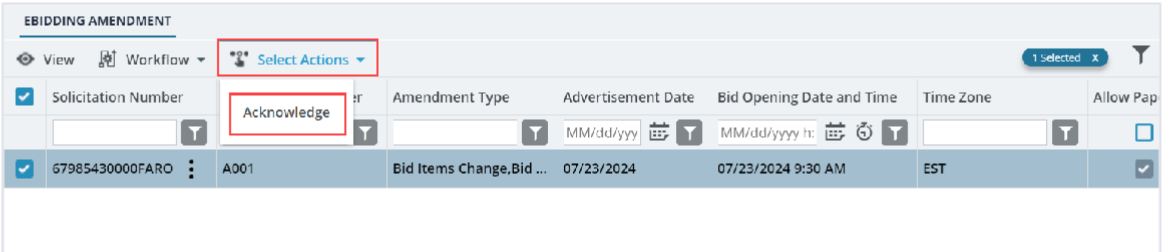


Figure 49: Workflow Action – Acknowledge

b. Click **Acknowledge**, and in the Masterworks dialog box, click **OK**. The record is moved to the Acknowledged workflow status.
You can now click the **e-Bidding** module to return to the **CONTRACTOR BIDDING LIST** page and make the necessary changes. For information on making changes to the bid response record, refer to Section 3.3.3. Submitting a Bid Response.

3.3.7. e-bidding Workflow Status

The following table provides the workflow status (current and subsequent status) of the e-Bidding record. For information on setting a workflow status to the next status, refer to Section 4.3. Workflow Status Transitions.

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
1	Published	Bidder	Bid in Progress	Bid in Progress	–
2	Bid in Progress	Submit Bid		Submitted	To perform this workflow action, ensure the following conditions are met: • All the amendment records are acknowledged. • The bid opening date and time have not passed. • The unit price and quantity are filled for all the bid items. • At least one attachment related

<table>
<tr><th>Phase</th><th>Current Workflow Status</th><th>Action Stakeholders</th><th>Action</th><th>Subsequent Workflow Status</th><th>Comments</th></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td>to bid guarantee is uploaded.</td></tr>
<tr><td rowspan="3">3</td><td rowspan="3">Submitted</td><td>Bidder</td><td>Return to Bid in Progress</td><td rowspan="2">Bid in Progress</td><td>You can perform this workflow action if the bid opening date and time have not passed.
Note: You must acknowledge the available amendments to resubmit the bid.</td></tr>
<tr><td><System Automated></td><td>–</td><td>After the bid is submitted, if any amendments are issued to the associated advertisement, the following changes occur:
The corresponding bid in the e-Bidding module is automatically moved to the Bid in Progress workflow status.
A notification email is sent to all the bidders who have submitted the bid.
Note:
You must acknowledge the available amendments to resubmit the bid.</td></tr>
<tr><td>Bidder</td><td>Withdraw</td><td>Withdrawn</td><td>You can perform this workflow action until the bid opening date and time have passed.
The withdrawn bids are not displayed in the Bid Opening And Review form.
Note: This workflow action</td></tr>
</table>

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					is not reversible.
		<System Automated>	–	Bid Corrections Required	Users assigned with the Acquisitions role can send a received bid for corrections, if required. In the Bid Opening And Review form, if a received bid is moved to the Sent to Bidder for Corrections workflow status, the following changes occur: • The corresponding bid in the e-Bidding module is automatically moved to the Bid Corrections Required workflow status. • A notification email is sent to the bidder who have submitted the bid.
4	Bid Corrections Required	Bidder	Re-submit	Submitted	To perform this workflow action, ensure the following conditions are met: • If any amendment records are available, those are acknowledged • The unit price and quantity are filled for all the bid items.

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					• At least one attachment related to bid guarantee is uploaded or available.

3.4. Bid Opening and Review

Post bid opening date and time, all the submitted bids from the e-Bidding module are available in the Bid Opening And Review form in the Received workflow status.

The Bid Opening And Review form enables you to:

- Analyze the bids received from various bidders
- Update incentive amounts
- Include A+B bidding components
- Import paper bids
- Send the bids received from the e-Bidding module for corrections, if applicable
- Identify the best bidder and award the bid
- Identify schedules, options, and alternates for awarding later during the construction phase

You can perform the following tasks:

- 3.4.1. Review bids
- 3.4.2. Import bids
- 3.4.3. Award bids

3.4.1. Reviewing a Bid

Prerequisites

- The bid is in the **Received** workflow status.
- The role of the logged-in user must be any of the following:
  - Administrator
  - Acquisitions

- Construction Component Lead
  For more information on role-specific permissions, refer to Table 3 – Bid Opening and Review Permission Matrix.

Overview

After the bid opening date and time have passed, the bids received from bidders are available in the Bid Opening And Review form. The **Bid Opening And Review** form enables you to review the received bids.

Steps

1. In the module menu, click **Projects**.
   The **PROJECTS** list page is displayed.

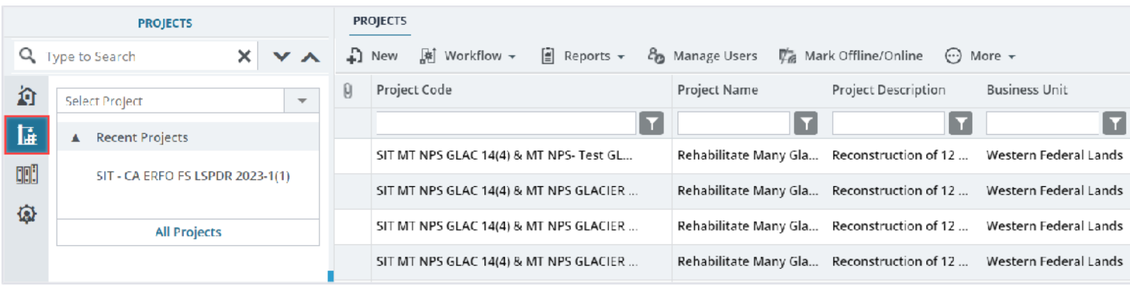


Figure 50: Navigation to Projects Module

2. In the list page, double-click the appropriate project, and then click the project folder to expand it.

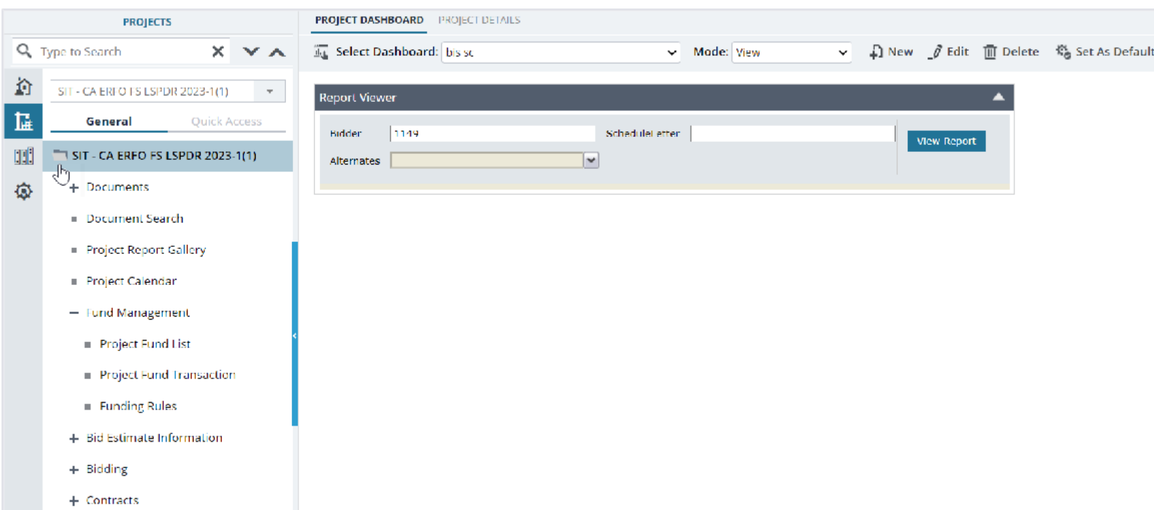


Figure 51: Expanding Projects Folder

3. In the navigation pane, expand Bidding, and then click Bid Opening And Review.
   The **BID OPENING AND REVIEW** list page is displayed.

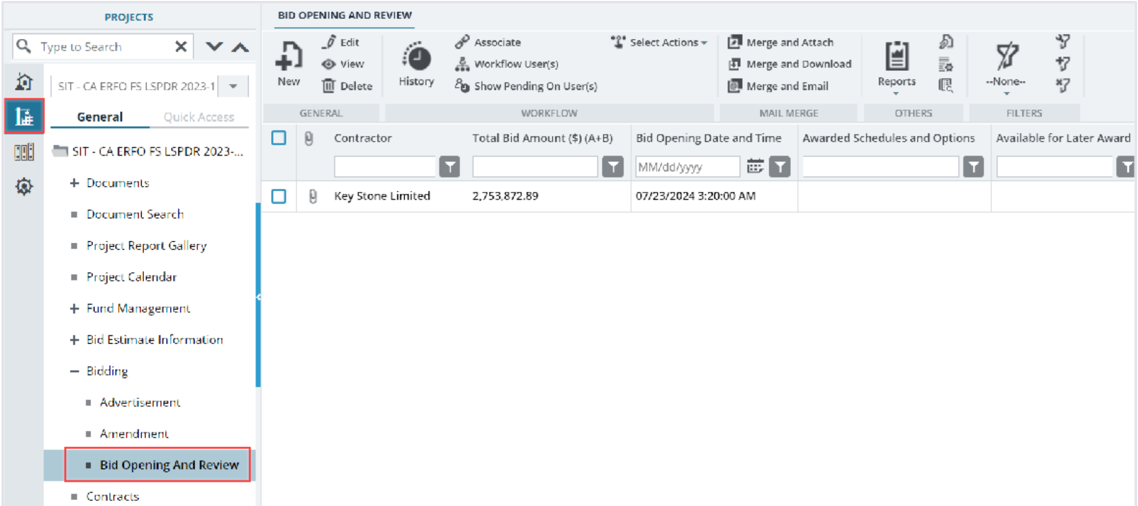


Figure 52: List Page of the Bid Opening And Review Form

4. In the list page, select the appropriate record, and then click **Edit**.

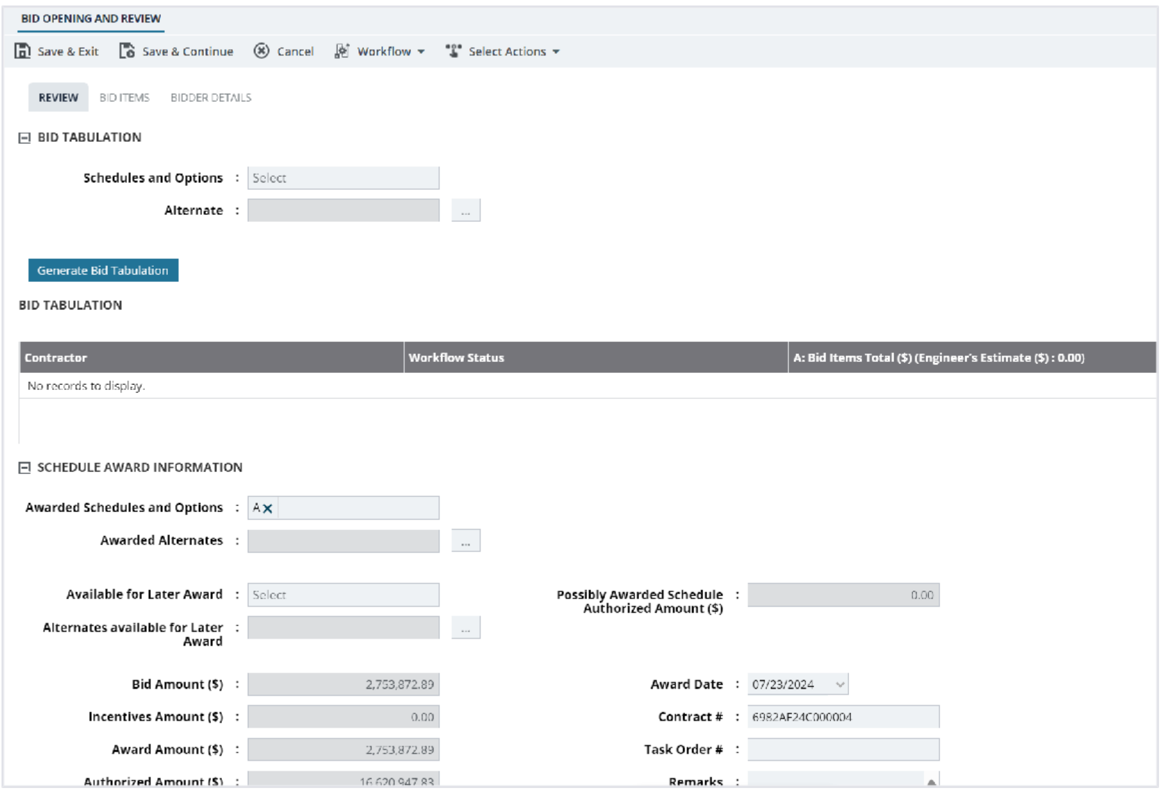


Figure 53: Bid Opening and Review Details Page

The **BID OPENING AND REVIEW** page displays the following information:

Note: This information is reviewed before awarding a bid.

Section Name	Field Name	Description
SCHEDULE AWARD INFORMATION	Bid Amount ($)	Based on the values selected in the **Awarded Schedules and Options** field, it displays the total amount of all bid items for the awarded schedules and options. If alternate containers are available, then only the items added as awarded alternates are considered for this calculation.
	Incentives Amount ($)	Based on the values selected in the **Awarded Schedules and Options** field, it displays the total amount of all ancillary items for the awarded schedules and options. If alternate containers are available, then only the items added as awarded, alternates are considered for this calculation.
	Award Amount ($)	Upon adding the values in the Awarded Schedules and Options field, it displays the total amount of total bid items and incentive items for the awarded schedules and options.
	Authorized Amount ($)	The sum of authorized amounts for all the
	Possibly Awarded Schedule Authorized Amount ($)	Based on the values selected in the Available for Later Award field, it displays the total amount of all bid items and ancillary for the schedules and options available for awarding later.

5. To generate bid tabulation, in the BID TABULATION section, perform the following steps:
a. From the Schedules and Options drop-down list, select the schedules and options. You can select multiple schedules and options. For example, A, B, etc.
b. In the Alternate field, perform the following steps:
   i. Click ...
   The **Alternate** dialog box is displayed.

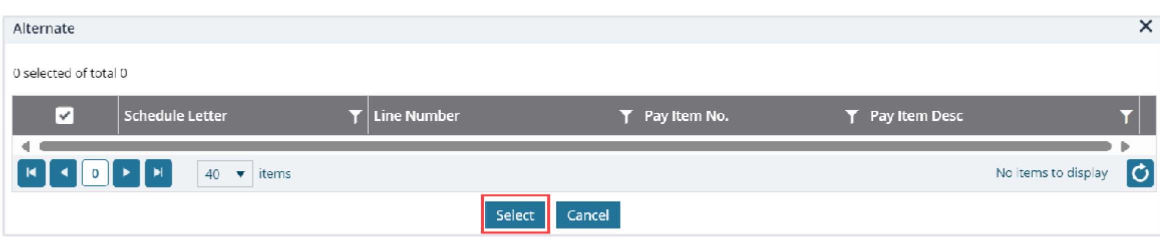


Figure 54: Alternate Dialog Box

Available options are alternates added for the schedules and options in the final engineer's estimate.

ii. Select the appropriate alternatives, and then click **Select.**

Note: If multiple alternates are available for a schedule or option, you can select only one from each category.

c. Click **Generate Bid Tabulation.**

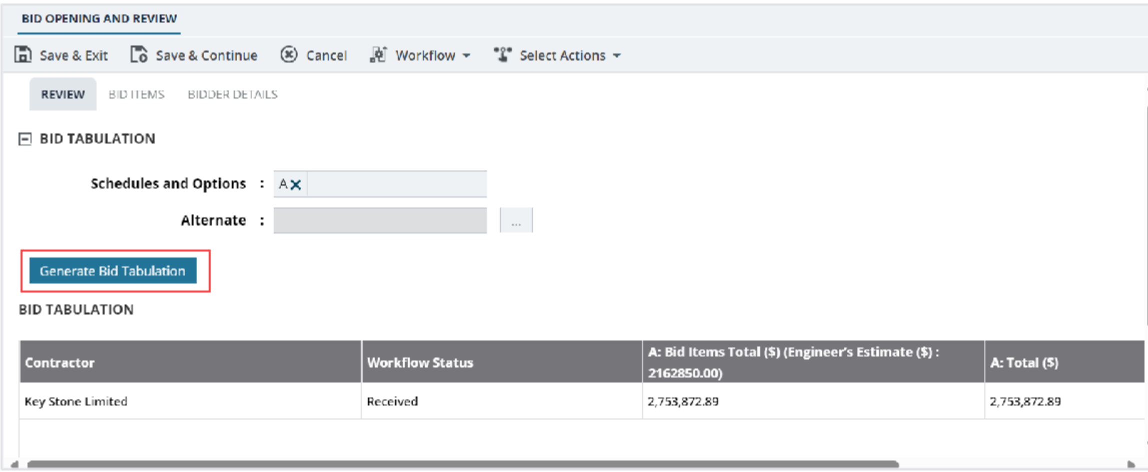


Figure 55: Generate Bid Tabulation Option

The **BID TABULATION** section displays the following information:

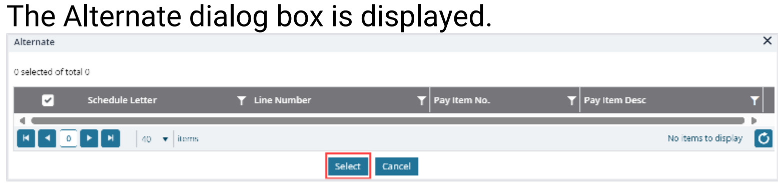
Field Name	Description
Contractor	The list of all the contractors (bidder) who submitted the bid in the grid in individual rows.
Workflow Status	The current workflow status of the bid in the BID OPENING AND REVIEW list page.
<Schedule letter>: Bid Items Total ($) (Engineer's Estimate ($)	The total amount of bid items for the schedule in the final engineer's estimate.
<Schedule Letter>: A+B Cost ($)	The total of A+B Cost for the schedule. **Note:** This column is displayed only if the A+B Bidding check box is selected in the published advertisement.
<Schedule Letter>: Total ($)	The sum of <Schedule letter>: Bid Items Total ($) (Engineer's Estimate ($)) and <Schedule Letter>: A+B Cost ($).
Bid Total ($)	The sum of <Schedule Letter>: Total ($) and <Option>: Total ($).

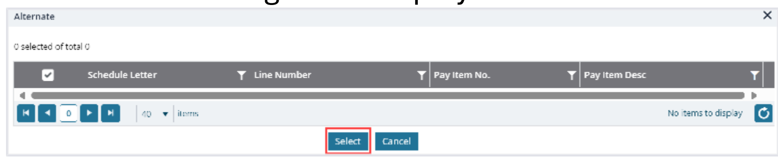
Note:

- The number of columns vary based on the selected schedules and options that are used to generate the bid tabulation.
- You can modify the values in the Schedules and Options and Alternatefields, and regenerate tabulation as required.

6. To define the schedules to be awarded and the schedules to be considered for awarding later, in the **SCHEDULE AWARD INFORMATION** section, provide the appropriate information in the fields, as described in the following table:

Note: The information provided in this section is irrespective of the **BID TABULATION** section. You can choose any combination of schedule letters to award.

Field Name	Description
Awarded Schedules and Options	From the multi-select drop-down list, select the schedules and options. The list displays all schedule letters and options from the final engineer's estimate. **Note:** If a schedule or option is selected as Available for Later Award, then you should not select it for awarding.
Awarded Alternates	To select the awarded alternates, perform the following steps: a. Click The Alternate dialog box is displayed.  *Figure 56: Alternate Dialog Box* The list displays all alternates added for the schedules and options in the final engineer's estimate. b. Select the appropriate alternates, and then click **Select**. The list displays all schedule letters and options from the final engineer's estimate. **Note:** • If multiple alternates are available for a schedule or option, you can select only one from each category. • If an alternate is selected as **Available for Later Award**, then you should not select it for awarding.
Available for Later Award	From the multi-select drop-down list, select the schedules and options for awarding later. The list displays all schedule letters and options from the final engineer's estimate.

Field Name	Description
	Note: If a schedule or option is selected as Awarded Schedules and Options, then you should not select it for awarding later.
Alternates available for Later Award	To select the alternates for awarding later, perform the following steps: a. Click ... The Alternate dialog box is displayed.  *Figure 57: Alternate Dialog Box* The list displays all alternates added for the schedules and options in the final engineer's estimate. b. Select the appropriate alternates, and then click **Select**. The list displays all schedule letters and options from the final engineer's estimate. **Note:** • If multiple alternates are available for a schedule or option, you can select only one from each category. • If an alternate is selected as Awarded Schedules and Options, then you should not select it for awarding later.
Award Date	From the calendar drop-down list, select the date for awarding the bid. **Note:** The date must not be earlier than the bid opening date and time.
Contract	Enter the contract number. **Note:** This contract number information is retrieved to the Contracts module.
Task Order	Enter the task order number. **Note:** This task order number information is retrieved to the Contracts module.
Remarks	Enter any appropriate remark for the bid.

7. To review the bid items, click the **BID ITEMS** tab.

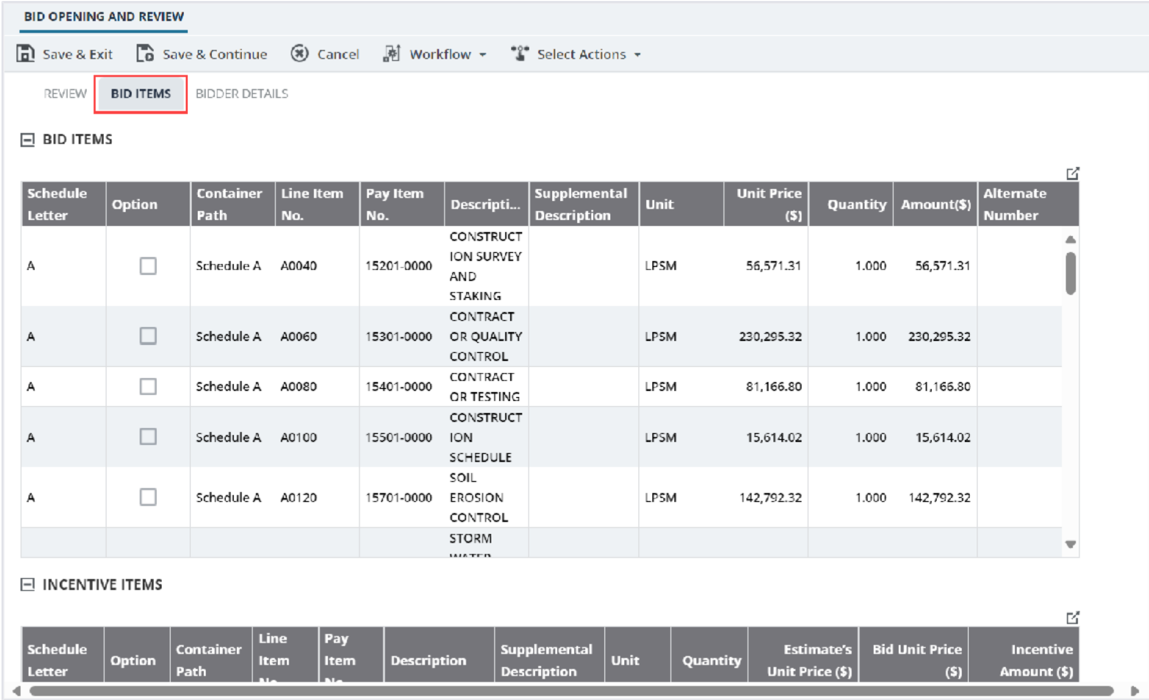


Figure 58: Bid Items Tab

The following information is displayed:

Section	Column Name	Description
Bid items	Schedule Letter	The schedule as defined in the final engineer's estimate.
	Option	The check box selection of the Pay Item No as defined in the final engineer's estimate.
	Container Path	The container name as defined in the final engineer's estimate.
	Line Item No	The line item number as defined in the final engineer's estimate.
	Pay Item No	The pay item number from the final engineer's estimate.
	Description	The description of the Pay Item No from the final engineer's estimate.
	Supplemental Description	The supplemental description of the Pay Item No as defined in the final engineer's estimate.
	Unit	The unit of the Pay Item No from the final engineer's estimate.
	Quantity	The quantity of the Pay Item No as defined in the final engineer's estimate.

Section	Column Name	Description
	Unit Price ($)	The unit price of the Pay Item No as defined in the submitted bid in the e-Bidding module or in the paper bid.
	Amount($)	The amount of the Pay Item No from the submitted bid in the e-Bidding module.
	Alternate Number	The sub container name of the Pay Item No as defined in the final engineer's estimate.
INCENTIVE ITEMS	Schedule Letter	The schedule as defined in the final engineer's estimate.
	Option	The check box selection as defined in the final engineer's estimate.
	Container Path	The container name as defined in the final engineer's estimate.
	Line Item No	The line item number as defined in the final engineer's estimate.
	Pay Item No	The pay item number from the final engineer's estimate.
	Description	The description of the Pay Item No from the final engineer's estimate.
	Supplemental Description	The supplemental description of the Pay Item No as defined in the final engineer's estimate.
	Unit	The unit of the Pay Item No from the final engineer's estimate.
	Quantity	The quantity of the Pay Item No as defined in the final engineer's estimate.
	Estimate's Unit Price ($)	The unit price of the Pay Item No as defined in the final engineer's estimate.
A+B BIDDING	Schedule Letter	The schedule as defined in the published advertisement.
	(A+B) Number of Days Bid	The number of days as defined in the submitted bid in the e-Bidding module or in the paper bid.
	Estimated Number of Days	The estimated number of days as defined in the published advertisement.
	Minimum Number of Days	The minimum number of days as defined in the published advertisement.
	Maximum Number of Days	The maximum number of days as defined in the published advertisement.
	Admin Cost ($)	The admin cost as defined in the published advertisement.
	A+B Cost ($)	Calculated as: Admin Cost ($) x (A+B) Number of Days Bid

Note: The **A+B BIDDING** section is available only if the **A+B Bidding** check box is selected in the published advertisement.

8. To enter the incentive amount for the ancillary items, in the **INCENTIVE ITEMS** section, in the **Bid Unit Price ($)** column of the appropriate item row, click and enter the unit price for the ancillary item. Upon entering the bid unit price, the **Incentive Amount ($)** column is automatically updated with the same bid unit price value for the same item.

   Note: For paper bids, this action is performed while importing the bid.

9. If changes are required in the received bids, you must provide appropriate remarks before sending it to the bidder.
   To enter remarks for bid correction, perform the following steps:
   a. Expand the **BID CORRECTION REMARKS** section.

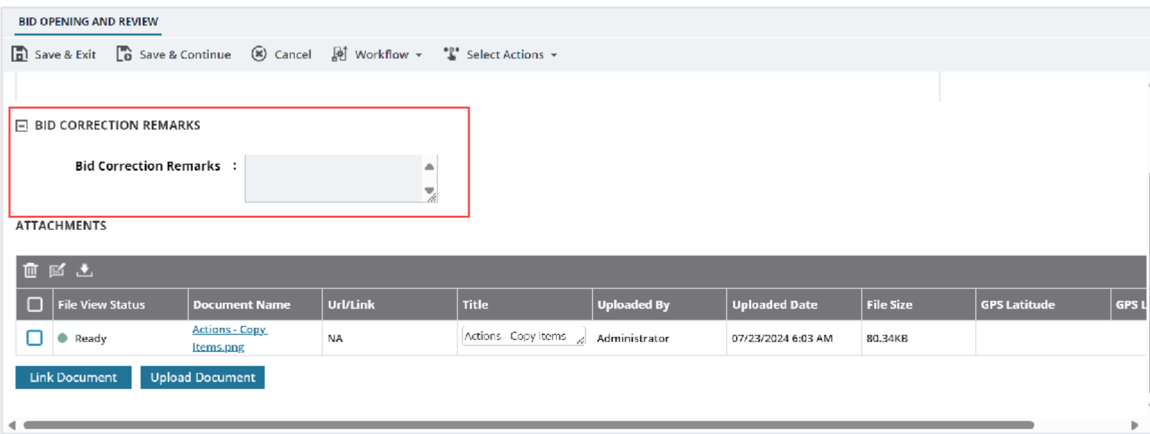


Figure 59: Bid Correction Remarks Section

   b. In the **Bid Correction Remarks** field, enter appropriate remarks to justify the need for bid correction.

10. To review the bidder details, click the **BIDDER DETAILS** tab.

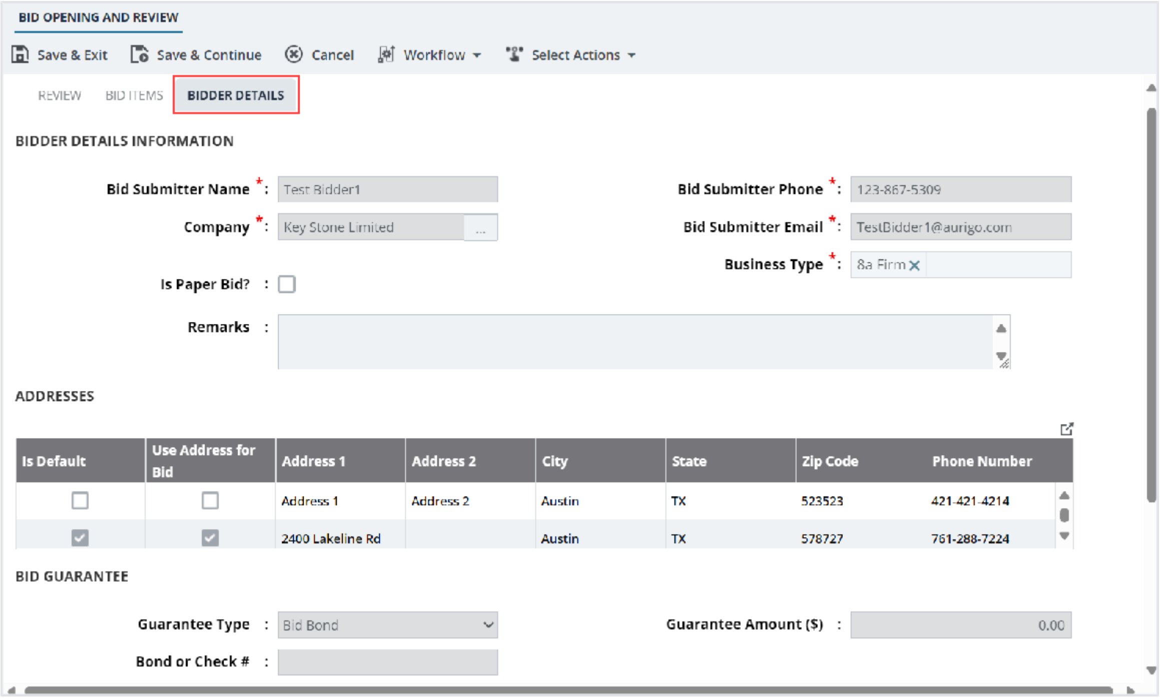


Figure 60: Bidder Details Tab

The following information is displayed:

Section	Field Name	Description
BIDDER DETAILS INFORMATION	Bid Submitter Name	The first name and last name of the bidder as defined in the submitted bid in the e-Bidding module.
	Company	The company of the bidder.
	Is Paper Bid	The checkbox is selected if the bid is imported manually, otherwise, it's blank.
	Bid Submitter Phone	The phone number of the bidder as defined in the submitted bid in the e-Bidding module.
	Bid Submitter Email	The email address of the bidder as defined in the submitted bid in the e-Bidding module.
	Business Type	The business type as defined in the submitted bid in the e-Bidding module.
	Remarks	The additional comments as defined in the submitted bid in the e-Bidding module.
ADDRESSES	Is Default	The check box selection as defined in the Contractor Details catalog of the library for the company addresses of the bidder or the submitted bid in the e-Bidding module, whichever applicable.
	Use Address for Bid	The check box selection as defined in the **Contractor Details** catalog of the library for the

Section	Field Name	Description
		company addresses of the bidder or the submitted bid in the **e-Bidding** module, whichever applicable.
	Address 1	The address as defined in the **Contractor Details** catalog of the library for the company addresses of the bidder or the submitted bid in the **e-Bidding** module, whichever applicable.
	Address 2	The address as defined in the **Contractor Details** catalog of the library for the company addresses of the bidder or the submitted bid in the **e-Bidding** module, whichever applicable.
	City	The city as defined in the **Contractor Details** catalog of the library for the company addresses of the bidder or the submitted bid in the **e-Bidding** module, whichever applicable.
	State	The state as defined in the **Contractor Details** catalog of the library for the company addresses of the bidder or the submitted bid in the **e-Bidding** module, whichever applicable.
	Zip Code	The postal code as defined in the Contractor Details catalog of the library for the company addresses of the bidder or the submitted bid in the e-Bidding module, whichever applicable.
	Phone Number	The phone number as defined in the Contractor Details catalog of the library for the company addresses of the bidder or the submitted bid in the e-Bidding module, whichever applicable.
BID GUARANTEE	Guarantee Type	The guarantee type as defined in the submitted bid in the e-Bidding module or in the paper bid.
	Bond or Check	The unique identifier for the guarantee amount as defined in the submitted bid in the **e-Bidding** module or in the paper bid.
	Guarantee Amount ($)	The guarantee amount as defined in the submitted bid in **the e-Bidding** module or in the paper bid.

11. Optionally, in the **ATTACHMENTS** section, upload or link related files.
    For information on attachments, refer to Section 4.1. Attachments.
12. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

3.4.2. Importing a Bid

Prerequisites

- In the published advertisement, the Allow Paper Bids check box is selected.
- The role of the logged-in user must be any of the following:
    - Administrator
    - Acquisitions

    For more information on role-specific permissions, refer to Table 3 – Bid Opening and Review Permission Matrix.

Overview

In the **Bid Opening and Review** form, you can import a bid manually. The Excel Import / Export feature enables you to manage paper bids. You can upload the updated Excel file with the necessary details directly to the form.

The high-level process for importing a bid is as follows:

1. Add the appropriate bidder information in the respective fields.
2. Save the record.
3. Export the template workbook.
4. Add the appropriate information in the template workbook.
5. Import the updated workbook.
6. Enter the appropriate unit price value for the respective ancillary items.

Steps

1. In the module menu, click **Projects**.
   The **PROJECTS** list page is displayed.

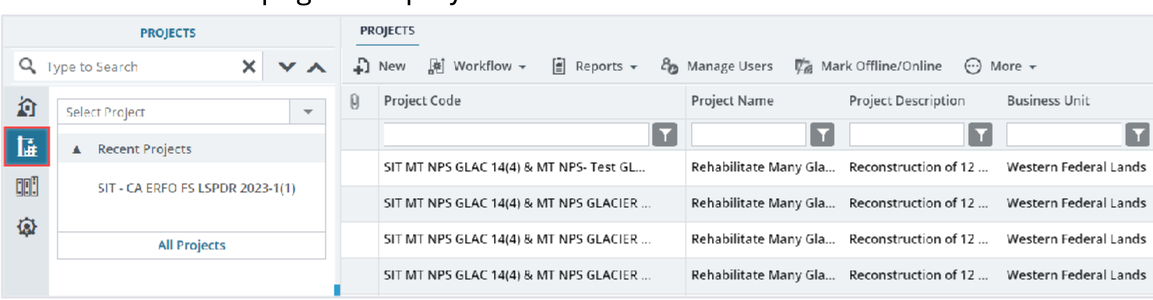


Figure 61: Navigation to Projects Module

2. In the list page, double-click the appropriate project, and then click the project folder to expand it.

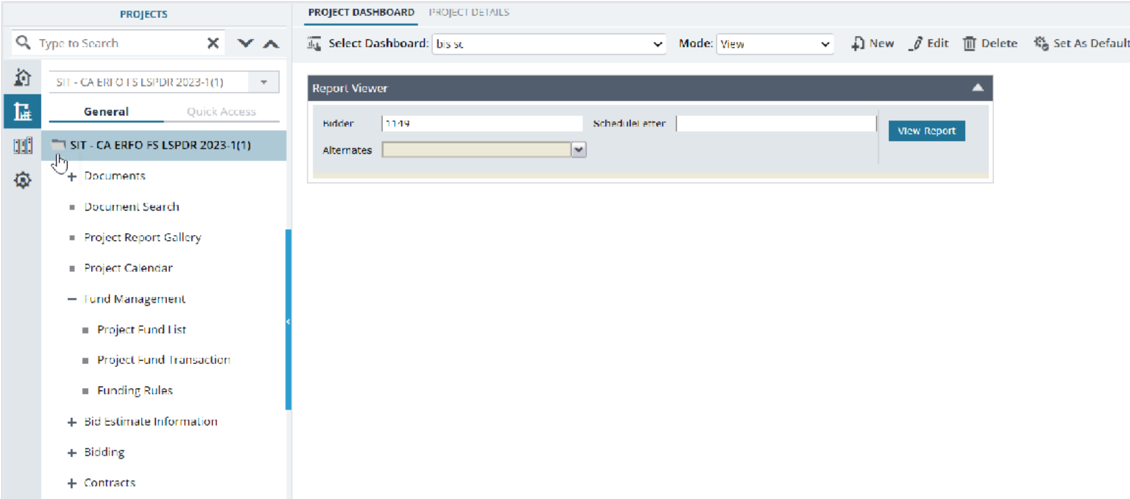


Figure 62: Expanding Projects Folder

3. In the navigation pane, expand Bidding, and then click Bid Opening and Review.
   The **BID OPENING AND REVIEW** list page is displayed.

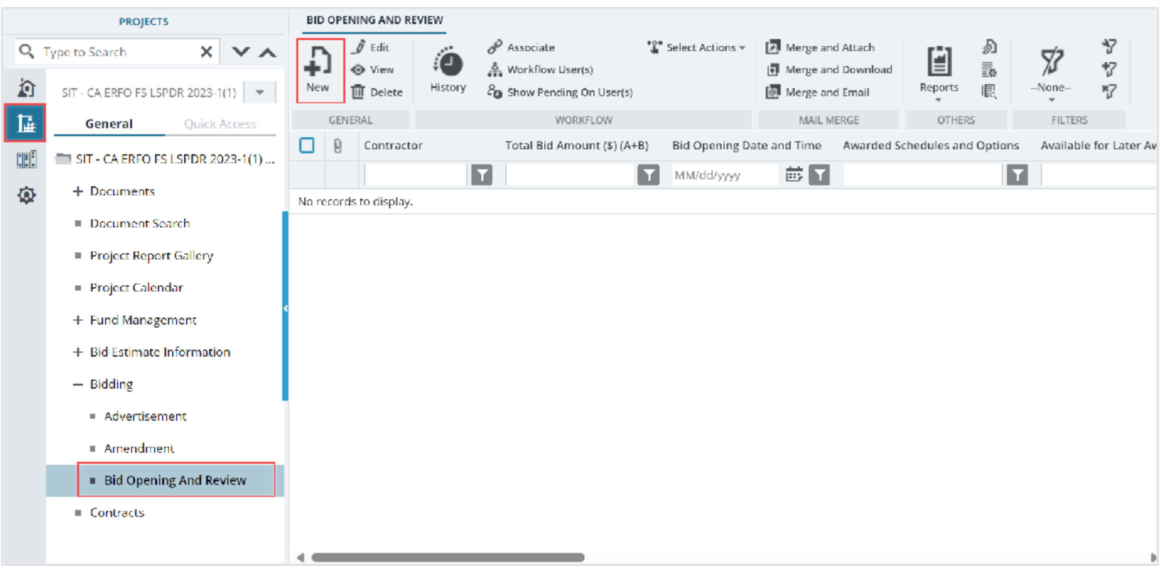


Figure 63: List Page of the Bid Opening and Review Form

4. Click **New.**

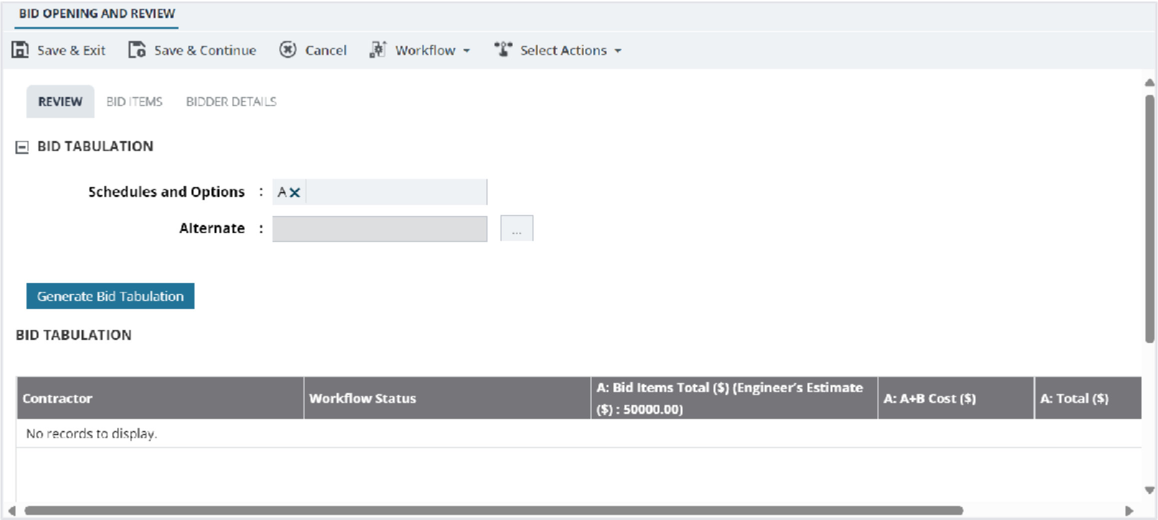


Figure 64: Bid Opening and Review Details Page

The **BID OPENING AND REVIEW** page displays the following information:

Field	Description
Bid Amount ($)	Based on the values selected in the **Awarded Schedules and Options** field, it displays the sum of all bid items for the awarded schedules and options.
Incentives Amount ($)	Based on the values selected in the **Awarded Schedules and Options** field, it displays the sum of all ancillary items for the awarded schedules and options. If alternate containers are available, then only the items added as awarded alternates are considered for this calculation
Award Amount ($)	Upon adding the values in the **Awarded Schedules and Options** field, it displays the sum of total bid items and incentive items for the awarded schedules and options.
Authorized Amount ($)	The sum of authorized amounts for all the **CON** type account codes.
Possibly Awarded Schedule Authorized Amount ($)	Based on the values selected in the **Available for Later Award** field, it displays the sum of all bid items and ancillary for the schedules and options available for awarding later. If alternate containers are available, then only the items added as alternates that are available for awarding later are considered for this calculation.

5. To enter the bidder information, perform the following steps:
   a. Click the **BIDDER DETAILS** tab.

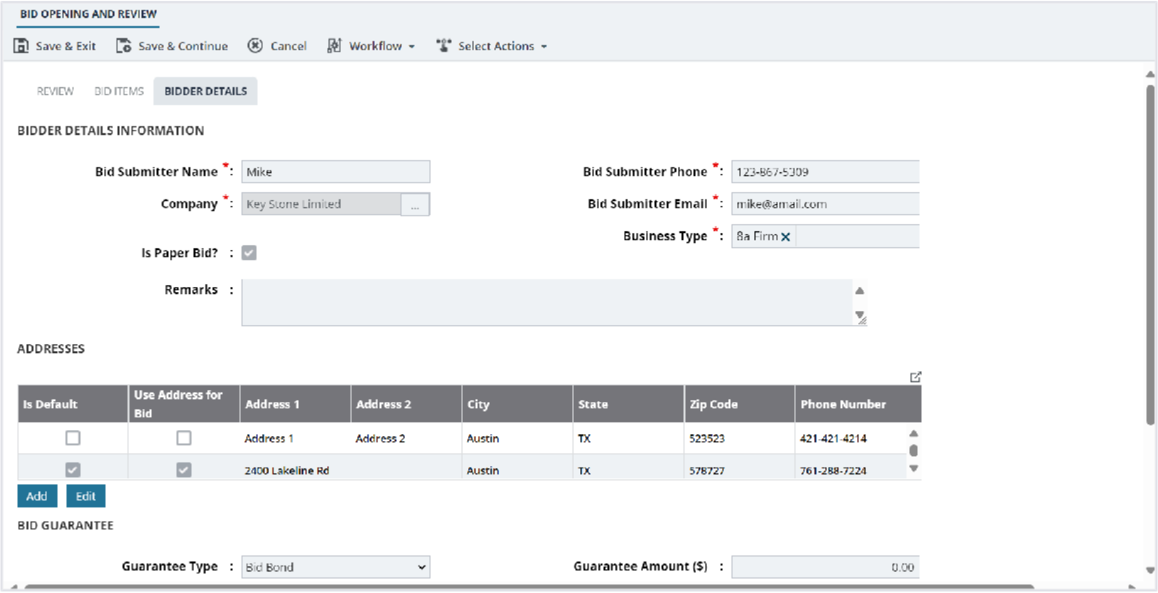
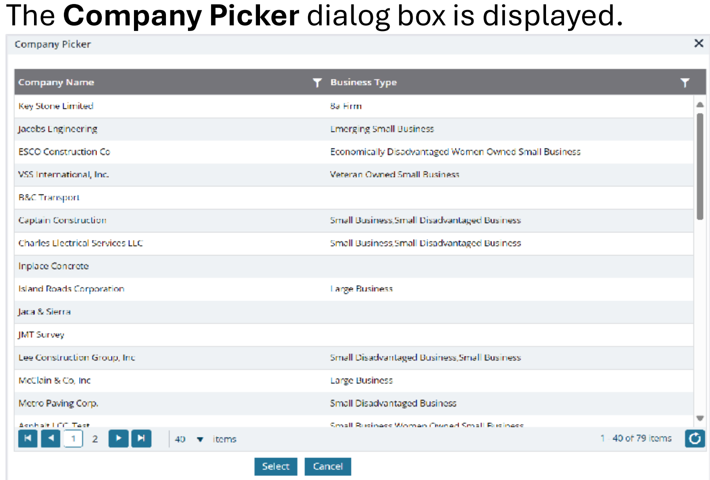


Figure 65: Bidder Details Tab

The **Is Paper Bid** field is checked.

   b. In the **BIDDER DETAILS INFORMATION** section, provide the appropriate information, as described in the following table:

Field	Description
Bid Submitter Name	Enter the first name and last name of the bidder.
Company	To select the company of the bidder, perform the following steps: i. Click [...] The **Company Picker** dialog box is displayed.  *Figure 66: Company Picker Dialog Box*

Field	Description
	Available options are active companies defined in the Contractor Details catalog of the library. ii. Select the appropriate company name, and then click **Select**. Upon selecting the company, the following updates occur: • The **Business Type** field displays the business types as defined in the Contractor Details catalog of the library for the selected company. You can also modify the details as necessary. • The **ADDRESSES** section displays the following information: o **Is Default**: The check box selection as defined in the Contractor Details catalog of the library for the selected company. o **Use Address for Bid**: The check box selection as defined in the Contractor Details catalog of the library for the selected company. o **Address 1**: The address as defined in the Contractor Details catalog of the library for the selected company. o **Address 2**: The address as defined in the Contractor Details catalog of the library for the selected company. o **City**: The city as defined in the Contractor Details catalog of the library for the selected company. o **State**: The state as defined in the Contractor Details catalog of the library for the selected company. o **Zip Code**: The postal code as defined in the Contractor Details catalog of the library for the selected company. o **Phone Number**: The phone number as defined in the Contractor Details catalog of the library for the selected company.
Bid Submitter Phone	Enter the phone number of the bidder.
Bid Submitter Email	Enter the email address of the bidder.
Remarks	Enter additional comments for the bidder.

c. To manage addresses, in the **ADDRESSES** section, perform the following steps, as applicable:

- To add an address, perform the following steps:

i. Click **Add**.

The **New Addresses** dialog box is displayed.

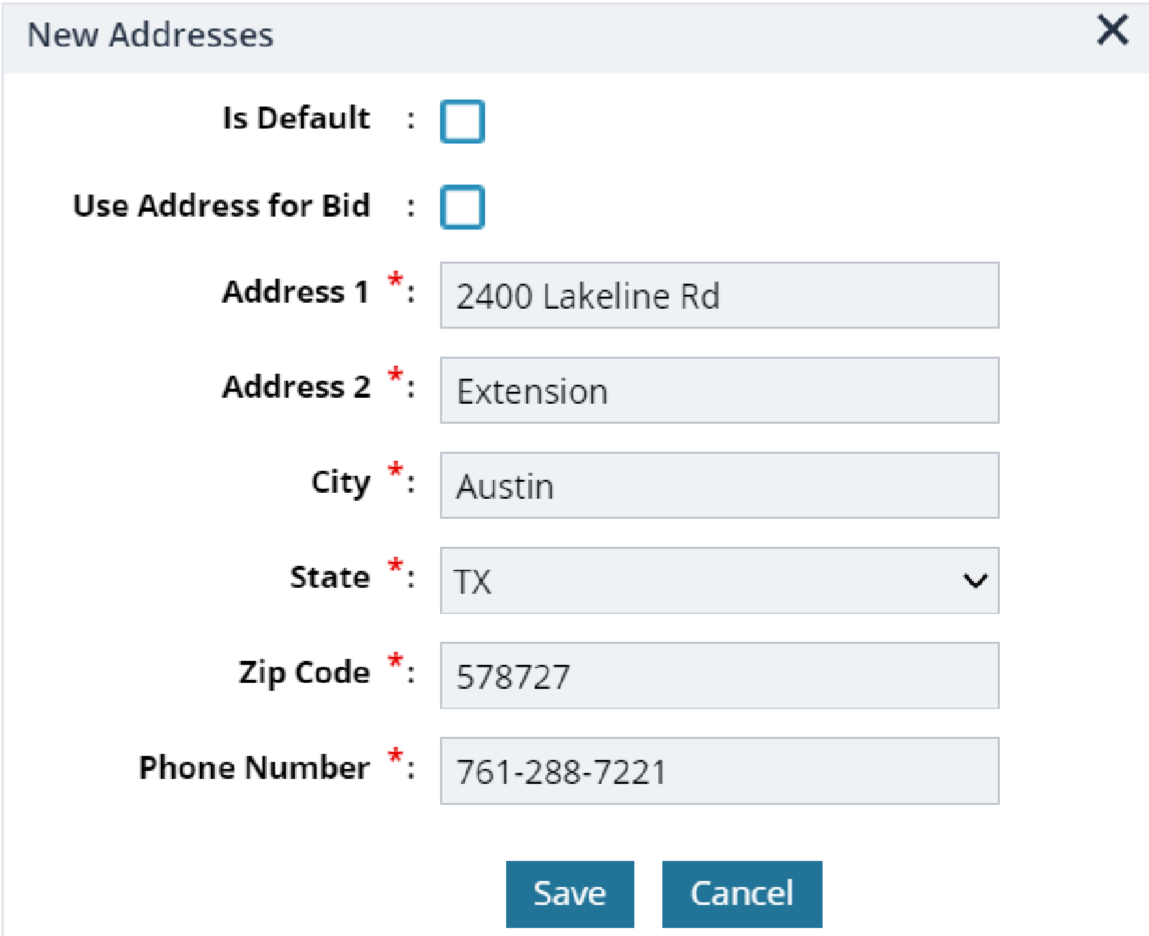


Figure 67: New Addresses Dialog Box

ii. Provide the appropriate information in the fields, as described in the following table:

Column Name	Description
Is Default	Select the check box to ensure the address is marked as the default address for the contractor. **Note:** • If this check box is selected, the same address is updated in the **Contractor Details** catalog of the library. • If you mark more than one address as default, then an error message is displayed upon performing the save action.
Use Address for Bid	Select the check box to ensure the address is used for bidding. **Note:** • The default address is automatically selected as **Use Address for Bid**. However, you can select other address by selecting this check box for that address. • If you mark more than one address to use for bidding, then an error message is displayed upon performing the save action.
Address 1	Enter the address.
Address 2	Enter the address.
City	Enter the city.
State	From the drop-down list, select the state. Available options are AK, AL, IL, TX, etc. The drop-down list displays the active states defined in the State/Territory catalog of the library.
Zip Code	Enter the postal code of the address.
Phone Number	Enter the phone number for the address.

iii. Click **Save.**

- To edit an address, perform the following steps:

i. Click **Edit**
The **Edit Addresses** dialog box is displayed.

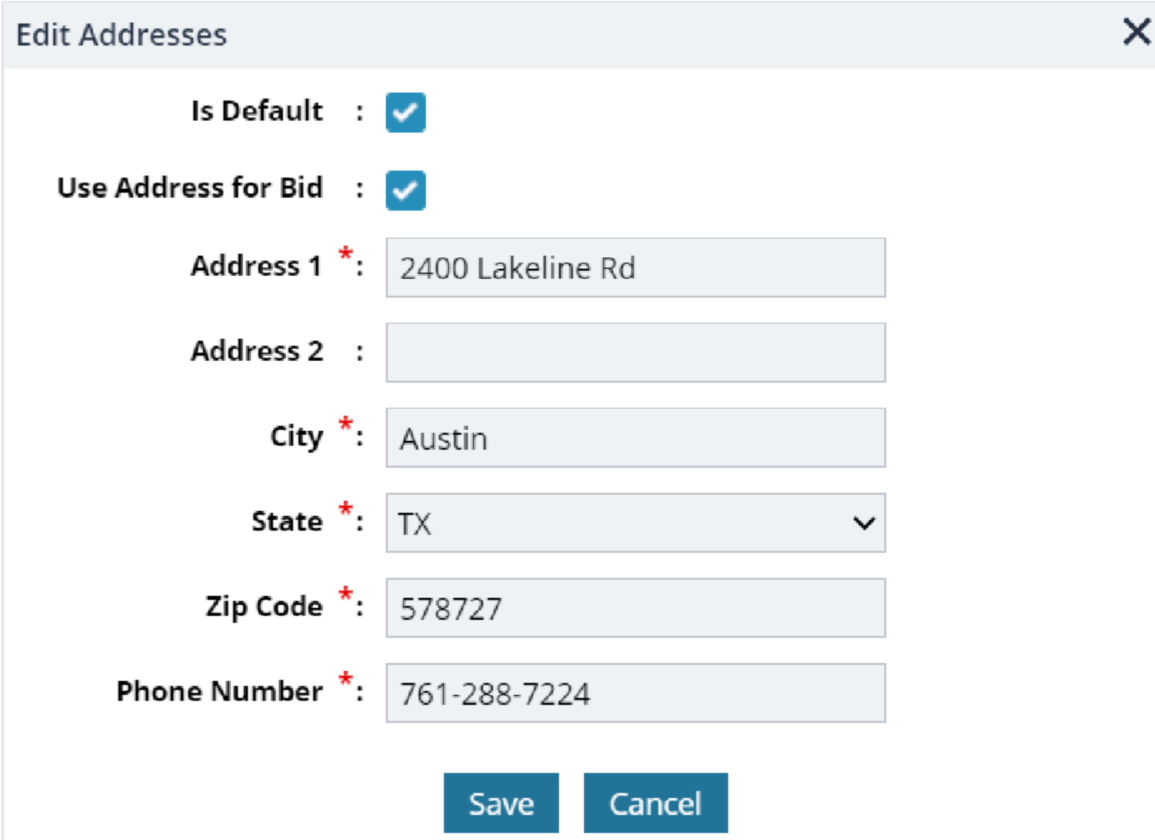


Figure 68: Edit Addresses Dialog Box

ii. Make the necessary changes.
iii. Click **Save**.

6. In the **BID GUARANTEE** section, provide the appropriate information in the fields, as described in the following table:

Field Name	Description
Guarantee Type	From the drop-down list, select the guarantee type. Available options are Bid Bond, Cashiers Check, Irrevocable Letter of Credit, etc. The drop-down list displays the active guarantee types defined in the Guarantee Type catalog of the library.
Bond or Check #	Enter a unique alphanumeric identifier for the guarantee amount that is submitted with the bid.
Guarantee Amount ($)	Enter the appropriate guarantee amount for the bid.

7. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click Cancel to discard the added information and exit the page.

Upon saving the record, all the bid items and its associated information are retrieved from the final engineer's estimate and the published advertisement to the appropriate sections in the **BID ITEMS** tab.

8. To export the Excel template workbook, perform the following steps:
   a. Click the **BID ITEMS** tab.

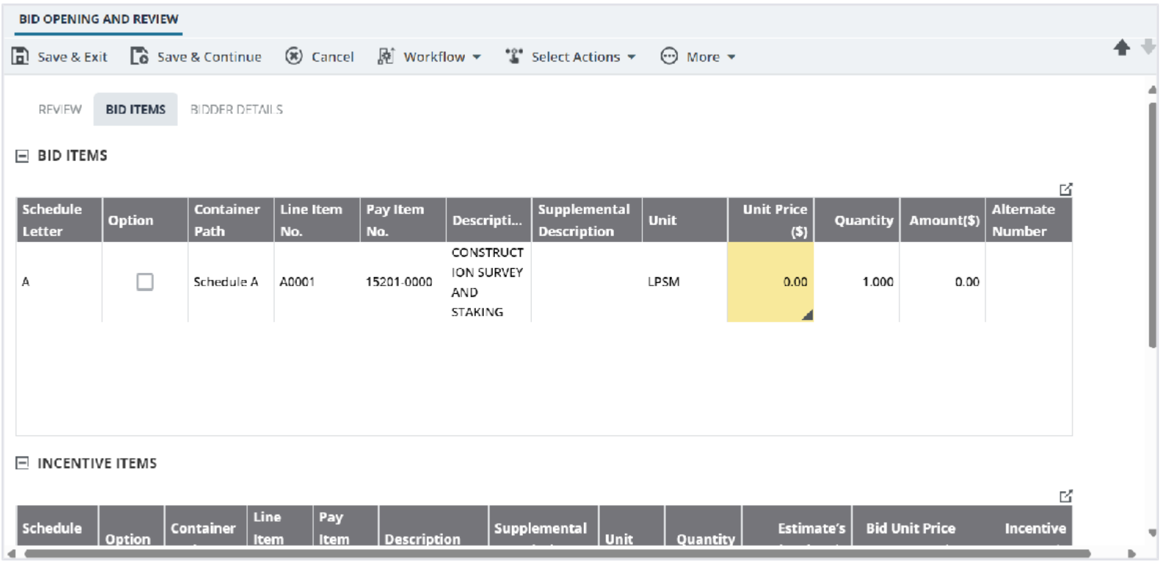


Figure 69: Bid Items Tab

Note: You can export the template from any of the three tabs.

The following information is displayed:

Section	Column Name	Description
BID ITEMS	Schedule Letter	The schedule as defined in the final engineer's estimate.
	Option	The check box selection of the Pay Item No as defined in the final engineer's estimate.
	Container Path	The container name as defined in the final engineer's estimate.
	Line Item No	The line item number as defined in the final engineer's estimate.
	Pay Item No	The pay item number from the final engineer's estimate.
	Description	The description of the Pay Item No from the final engineer's estimate.
	Supplemental Description	The supplemental description of the **Pay Item No.**
INCENTIVE ITEMS	Schedule Letter	The schedule as defined in the final engineer's estimate.
	Option	The check box selection as defined in the final engineer's estimate.

Section	Column Name	Description
	Container Path	The container name as defined in the final engineer's estimate.
	Line Item No	The line item number as defined in the final engineer's estimate.
	Pay Item No	The pay item number from the final engineer's estimate.
	Description	The description of the **Pay Item No** from the final engineer's estimate.
	Supplemental Description	The supplemental description of the **Pay Item No** as defined in the final engineer's estimate.
	Unit	The unit of the Pay Item No from the final engineer's estimate.
	Quantity	The quantity of the **Pay Item No** as defined in the final engineer's estimate.
	Estimate's Unit Price ($)	The unit price of the **Pay Item No** as defined in the final engineer's estimate.
A+B BIDDING	Schedule Letter	The schedule as defined in the advertisement.
	Estimated Number of Days	The estimated number of days as defined in the advertisement.
	Minimum Number of Days	The minimum number of days as defined in the advertisement.
	Maximum Number of Days	The maximum number of days as defined in the advertisement.
	Admin Cost ($)	The admin cost as defined in the advertisement.

b. Click **Excel Import / Export**, and then click **Excel Template with Data**.

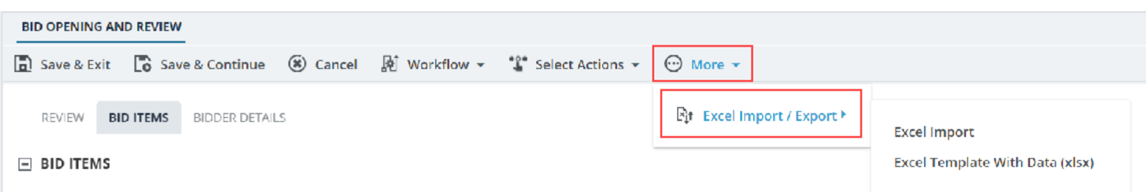


Figure 70: Excel Import / Export

The Excel workbook template is downloaded to the local storage.

c. Open the saved Excel workbook template.

9. In the Excel workbook template, enter the appropriate information in the various columns, as described in the following table:

Sheet	Column	Description
Bid Items	Unit Price ($)	Enter the unit price for each bid item.

Sheet	Column	Description
A+B Bidding	(A+B) Number of Days Bid	Enter the appropriate number of days within the range of the minimum and maximum number of days. **Note:** This sheet is available if A+B Bidding check box is selected in the published advertisement.

10. To import the bid, perform the following steps:
   a. In the **BID ITEMS** tab, click Excel Import / Export, and then click Excel Import. The **IMPORT DETAILS FROM EXCEL FILE** page is displayed.

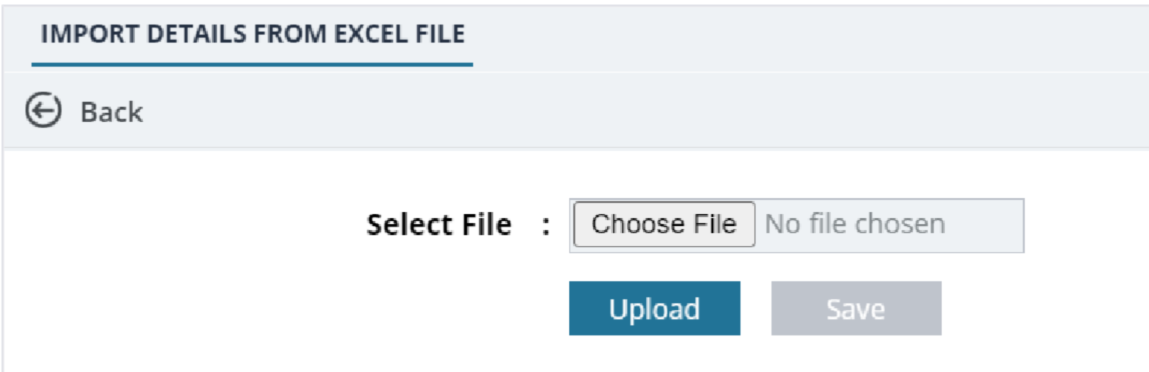


Figure 71: Import Details from Excel File

Note: You can import the workbook from any of the three tabs.

   b. Click **Choose File** to select the Excel workbook with updated information. The **Open** dialog box is displayed.
   c. Select the appropriate Excel workbook, and then click **Open**.
   d. Click Upload to import the information from the Excel workbook to the form.
   e. Click **Save**.
      On successful import, the success message is displayed.
   f. Click **Back.**
      The information in the Excel workbook are uploaded to the respective sections in the **BID ITEMS** tab.
      Additionally, the following updates occur:
      - In the **BID ITEMS** section, the **Amount ($)** column displays the value of each bid item. Calculated as: Quantity x Unit Price ($)
      - In the **A+B BIDDING** section, the **A+B Cost ($)** column displays the cost for each schedule. Calculated as: Admin Cost ($) x (A+B) Number of Days Bid

11. To enter the incentive amount for the ancillary items, in the **INCENTIVE ITEMS** section, in the **Bid Unit Price ($)** column of the appropriate item row, click and enter the unit price for the ancillary item.

Upon entering the bid unit price, the Incentive Amount ($) column is automatically updated with the same bid unit price value for the same item.

12. In the **ATTACHMENTS** section, upload or link files related to the bid guarantee. For information on attachments, refer to Section 4.1. Attachments.

13. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue the same page. Click Cancel to discard the added information and exit the page.

To review the imported bid, refer to Section 3.4.1. Reviewing a Bid.

3.4.3. Awarding a Bid

Prerequisites

- The record is in the **Received** workflow status.
- The role of the logged-in user must be any of the following:
  - Acquisitions
  - Administrator
  - Overview

Awarding is the process of short listing and awarding contracts to the most competitive bid.
The **Bid Opening And Review** form enables you to award the reviewed bids.
For more information on reviewing a bid, refer to Section 3.4.1. Reviewing a Bid.

Steps

1. In the module menu, click Projects.
   The **PROJECTS** list page is displayed.

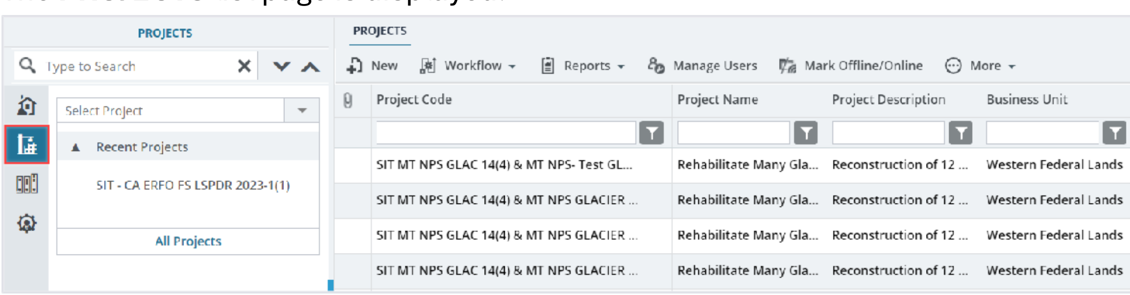


Figure 72: Navigation to Projects Module

2. In the list page, double-click the appropriate project, and then click the project folder to expand it.

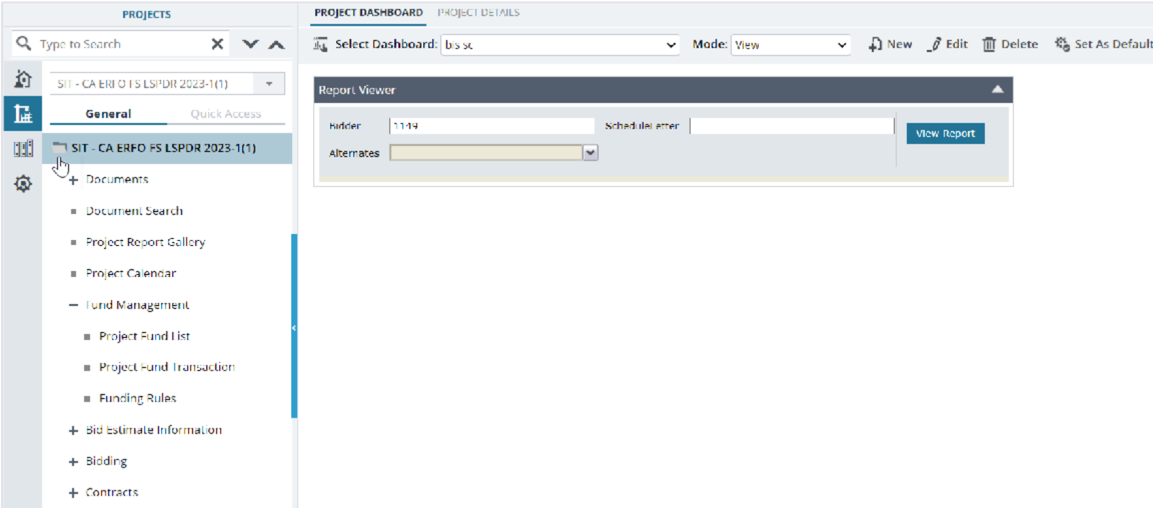


Figure 73: Expanding Projects Folder

3. In the navigation pane, expand Bidding, and then click Bid Opening And Review.
   The **BID OPENING AND REVIEW** list page is displayed.

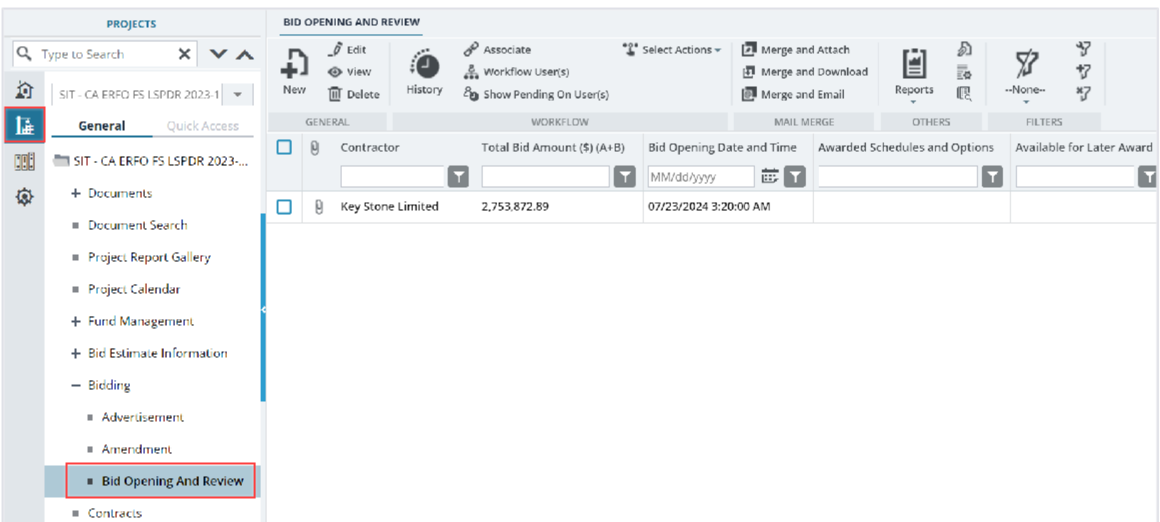


Figure 74: List Page of the Bid Opening and Review Form

4. In the list page, select the appropriate record in the **Received workflow** status, and then click **Select Actions**.

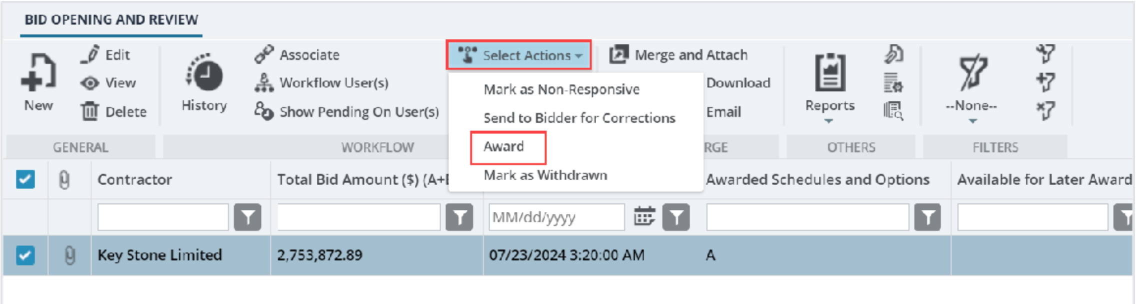


Figure 75: Workflow Action – Award

5. Click **Award**, and in the Masterworks dialog box, click **OK**.
   The record is moved to the Awarded workflow status.

3.4.4. Bid Opening and Review Workflow Status

The following table provides the workflow status (current and subsequent status) of the Bid Opening and Review record.

Note: You can perform workflow actions on the Bid Opening And Review record only if the bid opening date and time have passed.

For information on setting a workflow status to the next status, refer to Section 4.3. Workflow Status Transitions.

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
1	Received	Acquisitions Administrator	Award	Awarded	You can award only one bid in a project. To perform this workflow action, ensure the following conditions are met: • In the **SCHEDULE AWARD INFORMATION** section, the Awarded Schedules and Options, Contract, and Award Date

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					fields are filled. • The Authorized amount must be greater than or equal to the Award Amount. After the record is moved to the Awarded workflow status, the following changes occur: • A notification email is sent to the users assigned with the Lead Designer and Construction Admin Staff role for the project. • The available bids in the Bid Opening And Review form cannot be edited. **Note:** The following Fields remain editable even after the Bid Opening and Review record is awarded: • Award Date • Contract Task # • Order #
			Send to Bidder for Corrections	Sent to Bidder for Corrections	To perform this workflow action,

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					ensure the following conditions are met: • The bid is received through the e-Bidding module. • The Bid Correction Remarks field is not empty. After the record is moved to the Sent to Bidder for Corrections workflow status, the following changes occur: • The corresponding bid in the e-Bidding module is automatically moved to the Bid Corrections Required workflow status. • A notification email is sent to the bidder who have submitted the bid.
			Mark as Non-Responsive	Non-Responsive	–
			Mark as Withdrawn	Withdrawn	You can perform this workflow action only if the bid is manually

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					imported to the Bid Opening And Review form.
2	Sent to Bidder for Corrections	<System Automated>	–	Received	Once the bidder resubmits the bid in the e-Bidding module, the following changes occur: • The corresponding bid in the **Bid Opening And Review** form is automatically moved to the Received workflow status. • A notification email is sent to the users assigned with the Acquisitions role for the project.
3	Non-Responsive	• Acquisitions • Administrator	Move back to Received	Received	–
4	Withdrawn				To perform this workflow action, ensure the following conditions are met: • The bid is manually imported to the Bid Opening And Review form.

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					• No bid is moved to the Awarded workflow status.
5	Awarded	• Acquisitions • Administrator • Construction Component Lead	HideButton	Close	–

3.4.5. Generating Bid Opening and Review Reports

Prerequisites

The role of the logged-in user must be any of the following:

- Administrator
- Acquisitions

Overview

Based on the roles assigned to you, you can generate reports that illustrate various types of information.

Steps

1. In the module menu, click **Projects**.
   The **PROJECTS** list page is displayed.

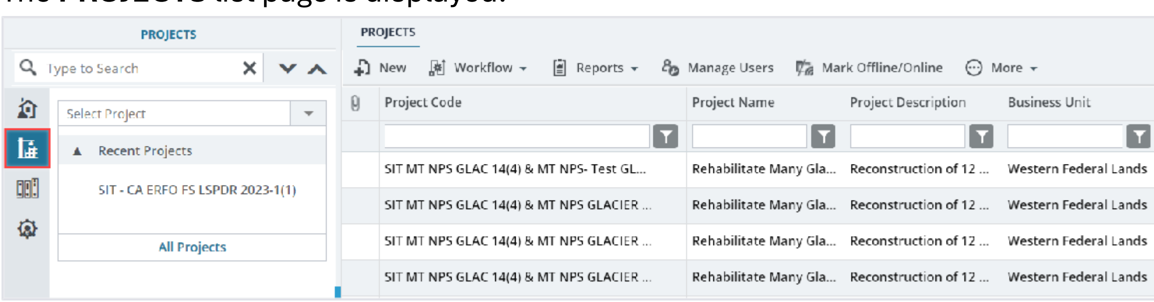


Figure 76: Navigation to Projects Module

2. In the list page, double-click the appropriate project, and then click the project folder to expand it.

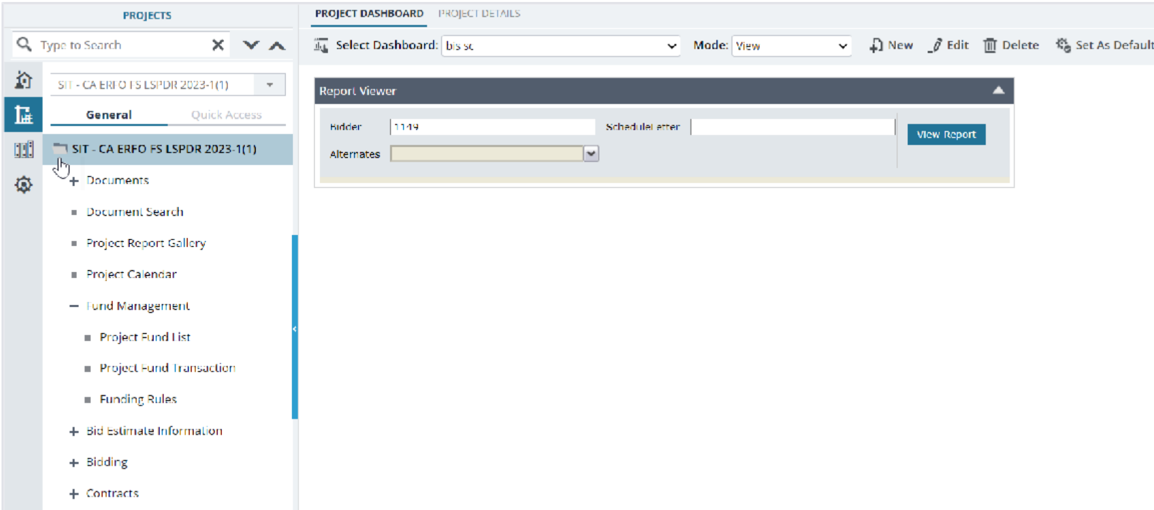


Figure 77: Expanding Projects Folder

3. In the navigation pane, expand Bidding, and then click Bid Opening and Review. The **BID OPENING AND REVIEW** list page is displayed.

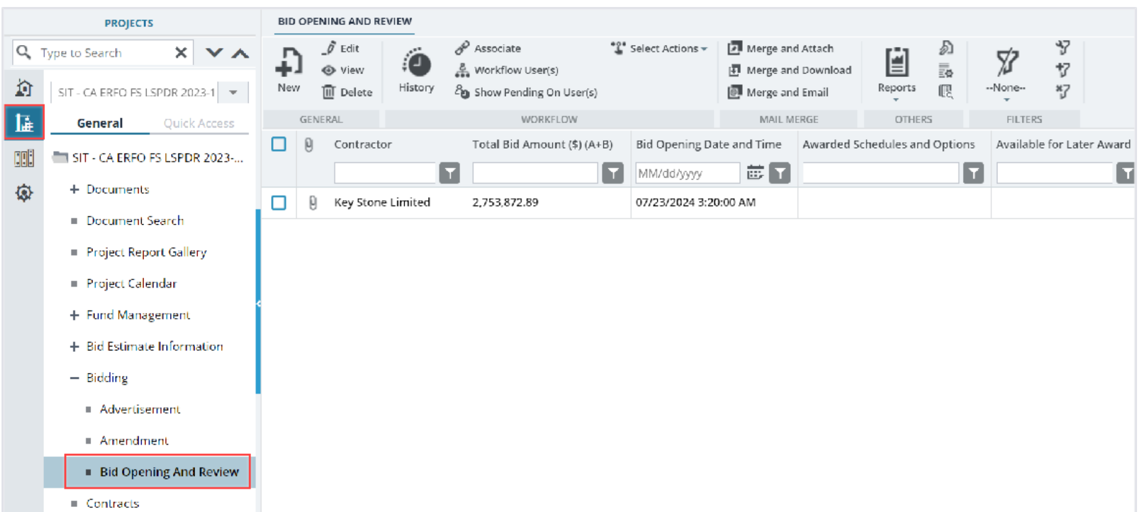


Figure 78: List Page of the Bid Opening And Review Form

4. In the list page, click Reports, and then click the appropriate report.

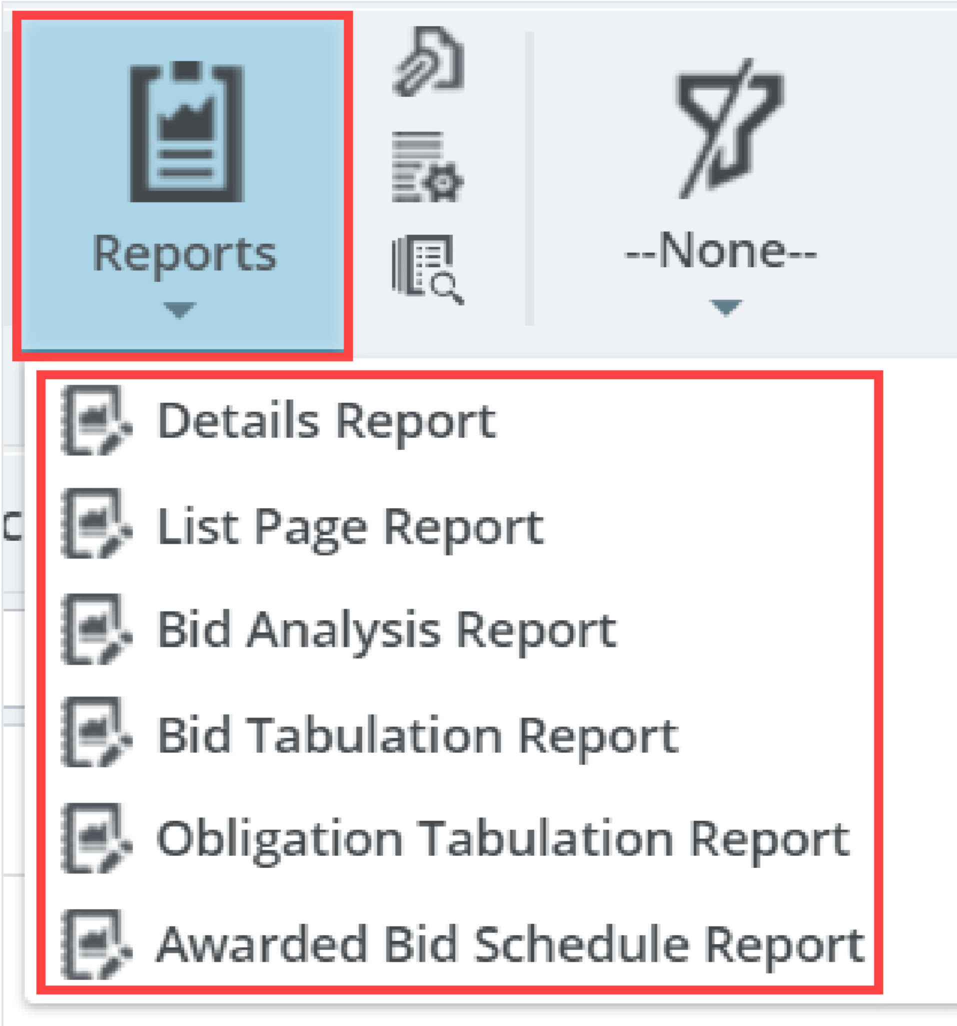


Figure 79: Bid Opening and Review Reports

The report is generated and displayed. You can generate the following reports:

- Awarded Bid Schedule Report
- Bid Tabulation Report
- Obligation Tabulation Report
- Bid Analysis Report

For more information on the various report features available, refer to Section 4.2. Standard Report Functions.

4. Appendix

4.1. Attachments

You can upload or link files in the Documents folders to every record. You can also upload any number of attachments, regardless of size, to a record or while performing workflow actions for a record.
The following sections explain how to upload or link, access, and download attachments in a form or workflow:

- 4.1.1. Attaching a File to a Form
- 4.1.2. Attaching a File to a Workflow
- 4.1.3. Accessing and Downloading Attached Files
- 4.1.4. Deleting Attached Files

You can annotate and delete attachments.

4.1.1. Attaching a File to a Form

You can upload files to a form and link a file in the Documents folders of a form.

Note: The **Upload** and **Link New Document** option is the most preferred and used method to link files to a form by the FLH team.
The **Project Fund List** form is used for illustration purposes.

Uploading Files to a Form

To upload files, perform the following steps in the **ATTACHMENTS** section:

1. Click **Upload Document**.

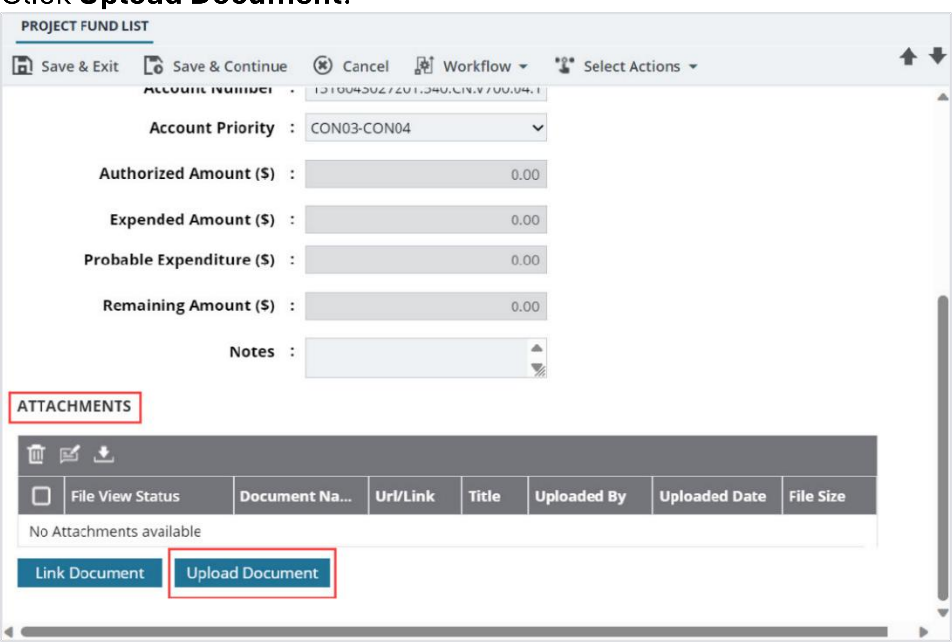


Figure 80: Using Upload Document Option

The **Open** dialog box is displayed.

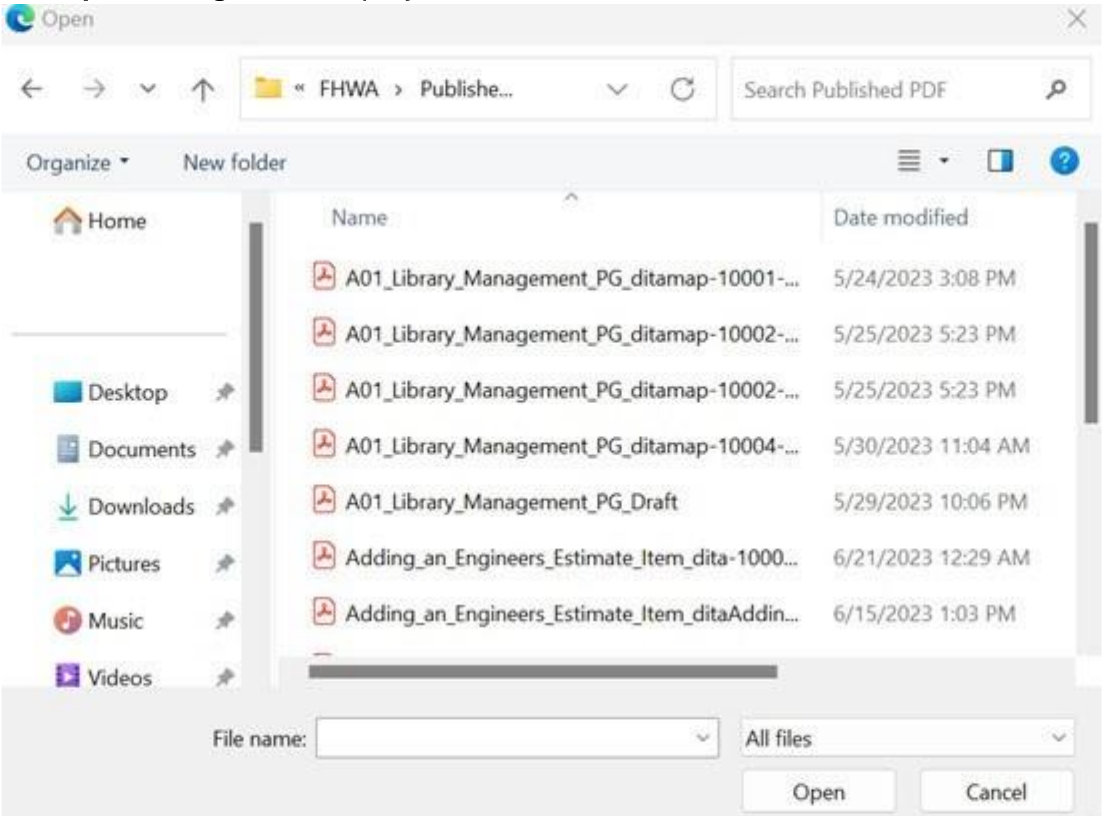


Figure 81: Open Dialog Box

2. To upload a single file, click the appropriate file.
   Optionally, to upload multiple files, press and hold **CTRL**, and then click the appropriate files.

3. Click **Open**.

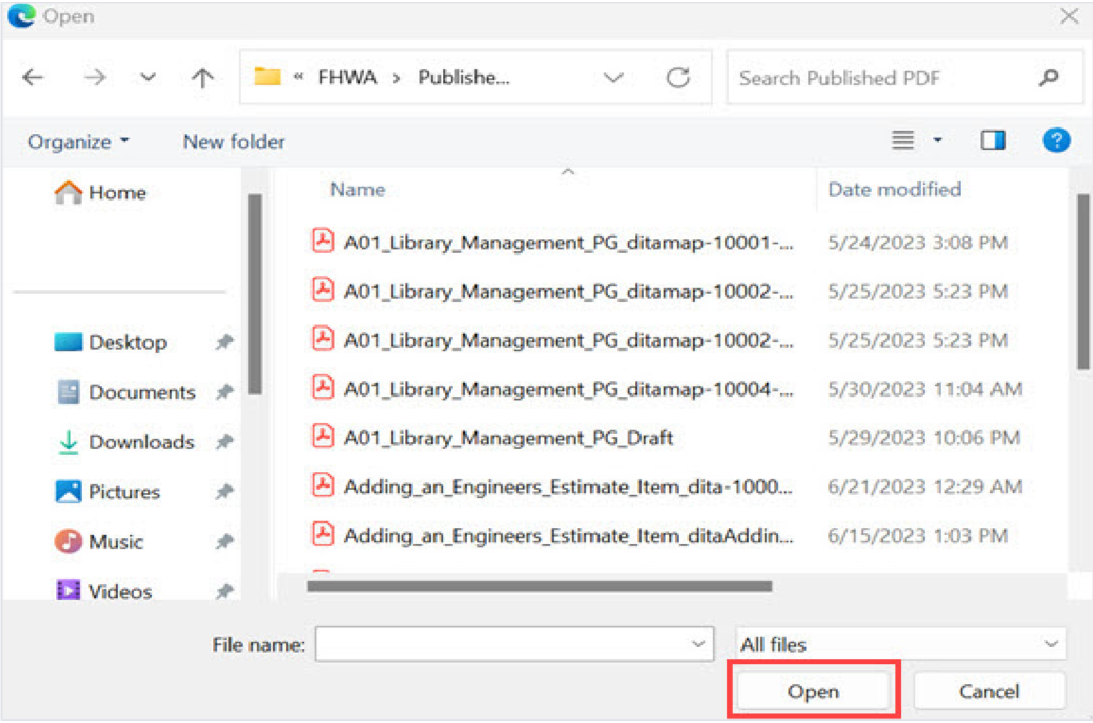


Figure 82: Open Option

The files are uploaded to the form and displayed in the **ATTACHMENTS** section.

4. The name of the file is updated in the **Title** column.
   Optionally, in the **Title** column, enter the tiles for the files attached.

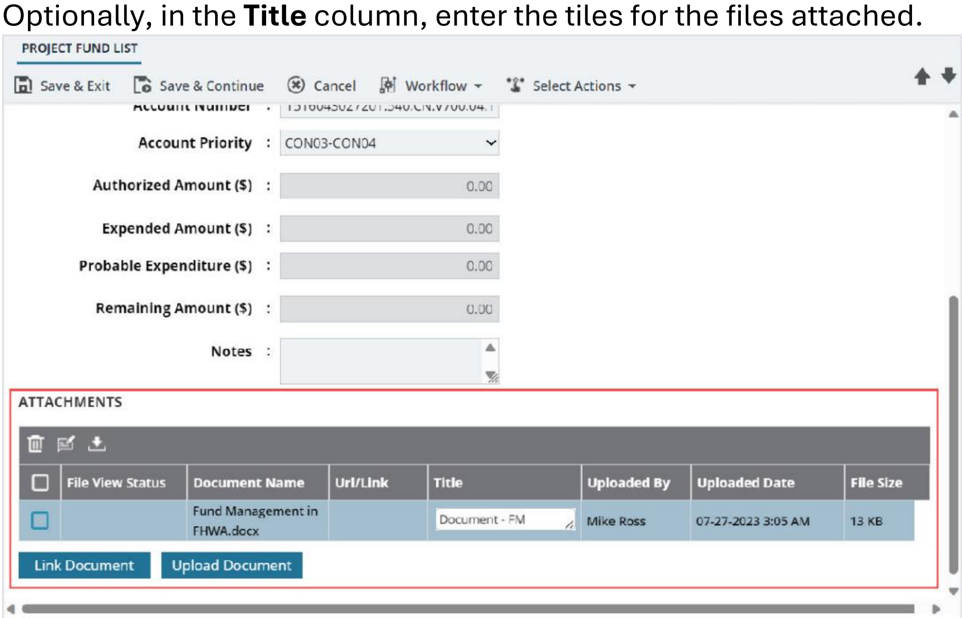


Figure 83: Uploaded File

Linking a File to a Form

You can link a file to a form using any of the following options:

- **Masterworks Document:** This option enables you to link files available in the document folders of a project or contract. The document folders are available based on the selected document folder structure in the **PROJECT DETAILS** page.
  Note: This option helps users avoid uploading the same files multiple times in a project.

- **Upload and Link New Document:** This option enables you to upload new files to the document folders of a project or contract and link them to the respective form. The document folders are available based on the selected document folder structure in the PROJECT DETAILS page.
  Note: This option helps users upload new files into the document folder structure from the respective form without navigating to the document folder.
  The Upload and Link New Document option is the most preferred and used method to link files to a form by the FLH team.

- **External Document:** This option enables you to link files from an external location.

Linking a File to a Form – Masterworks Document Option

To link a file available in the Documents folders, perform the following steps:

1. In the **ATTACHMENTS** section, click **Link Document**.

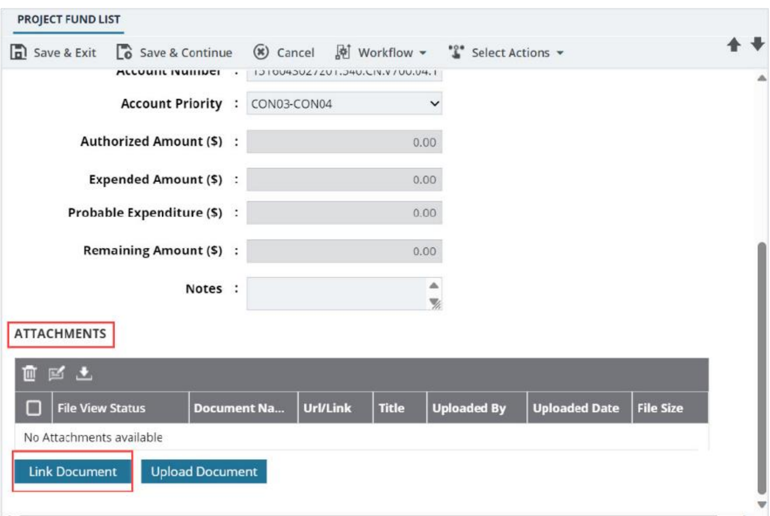


Figure 84 : Using Link Document Option

The **Link Document** dialog box is displayed.

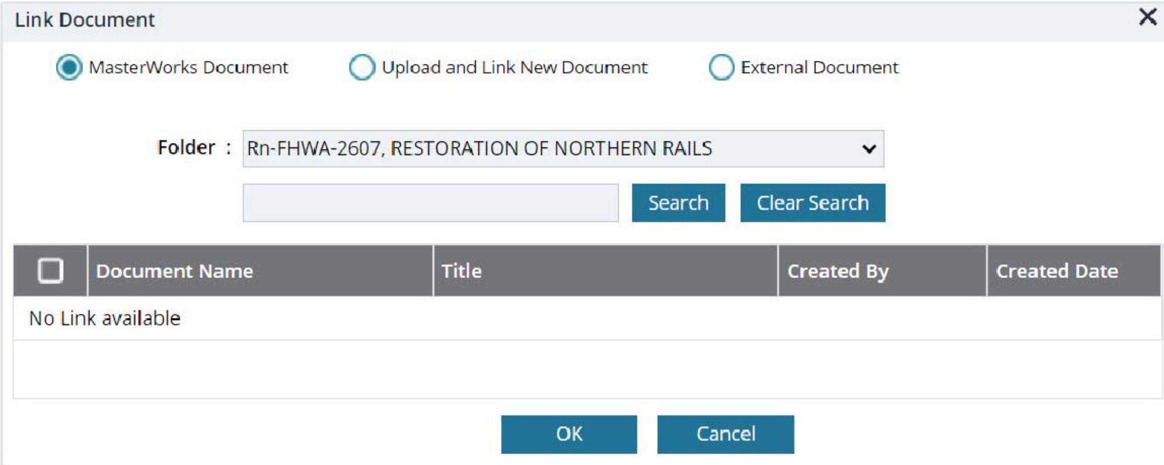


Figure 85: Link Document Dialog Box

2. Click **Masterworks Document**.

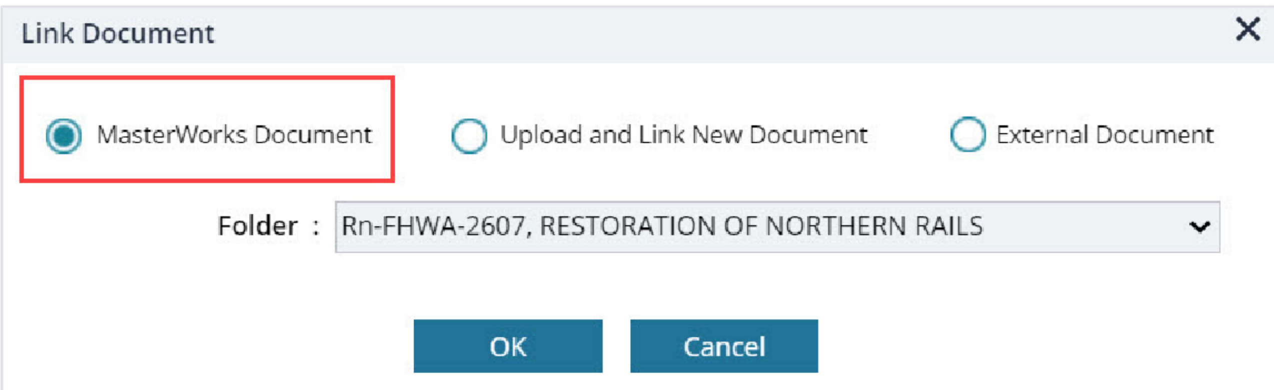


Figure 86: Using Masterworks Document Option

3. In the **Folder** drop-down list, select the appropriate document folder where the files exist. The list of files in that folder is displayed.

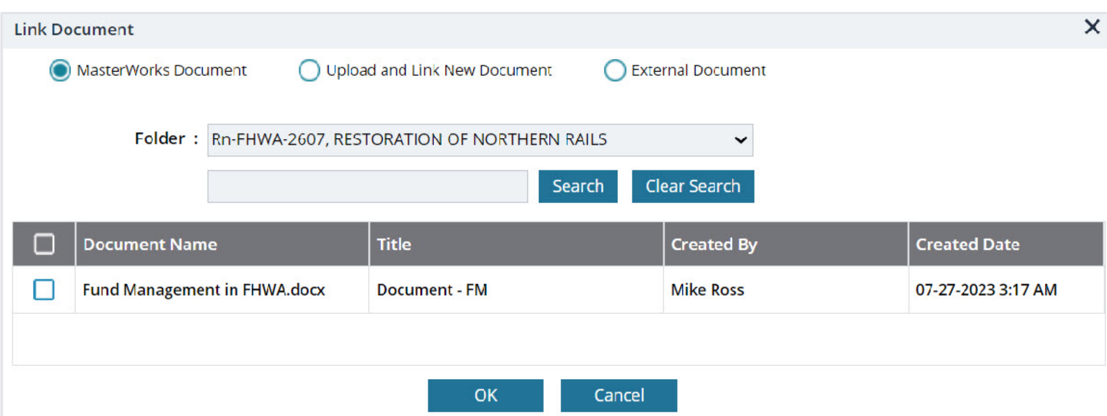


Figure 87: List of Documents

4. Perform any of the following steps, as applicable:
   - From the list of files, select the appropriate files.
   - To search for a file, in the box, enter any search criteria for the file, click **Search**, and then select the appropriate files.

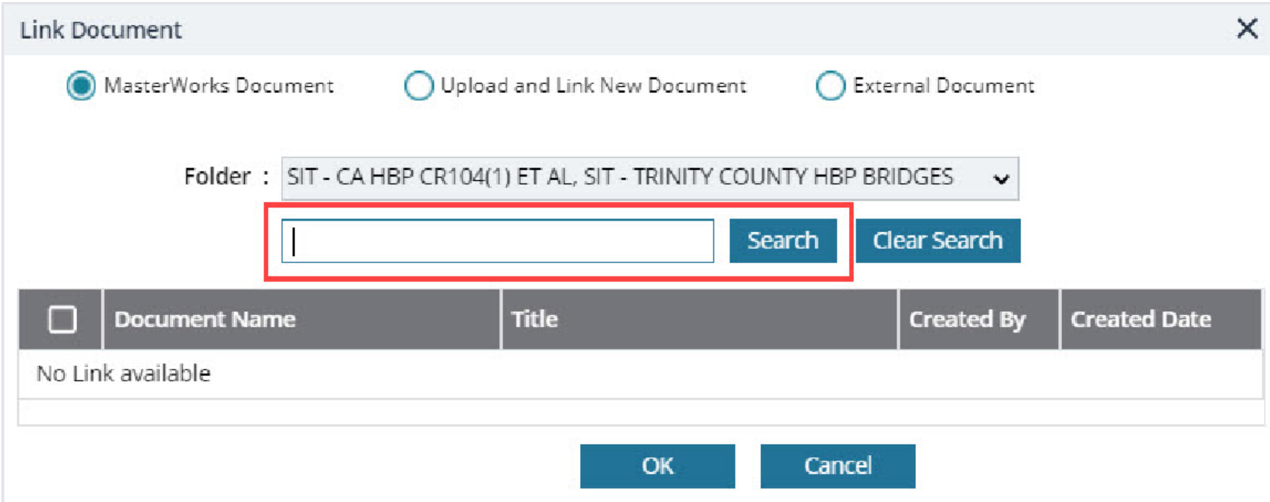


Figure 88: Using Search Option

You can specify search criteria such as the extension of the file type, the date or time the file was uploaded, the name or title of the file, or the username of the user who uploaded the file. Optionally, to view all the files in the selected folder, click **Clear Search**.

5. Click **OK**.
   The files are linked to the form and are displayed in the **ATTACHMENTS** section.

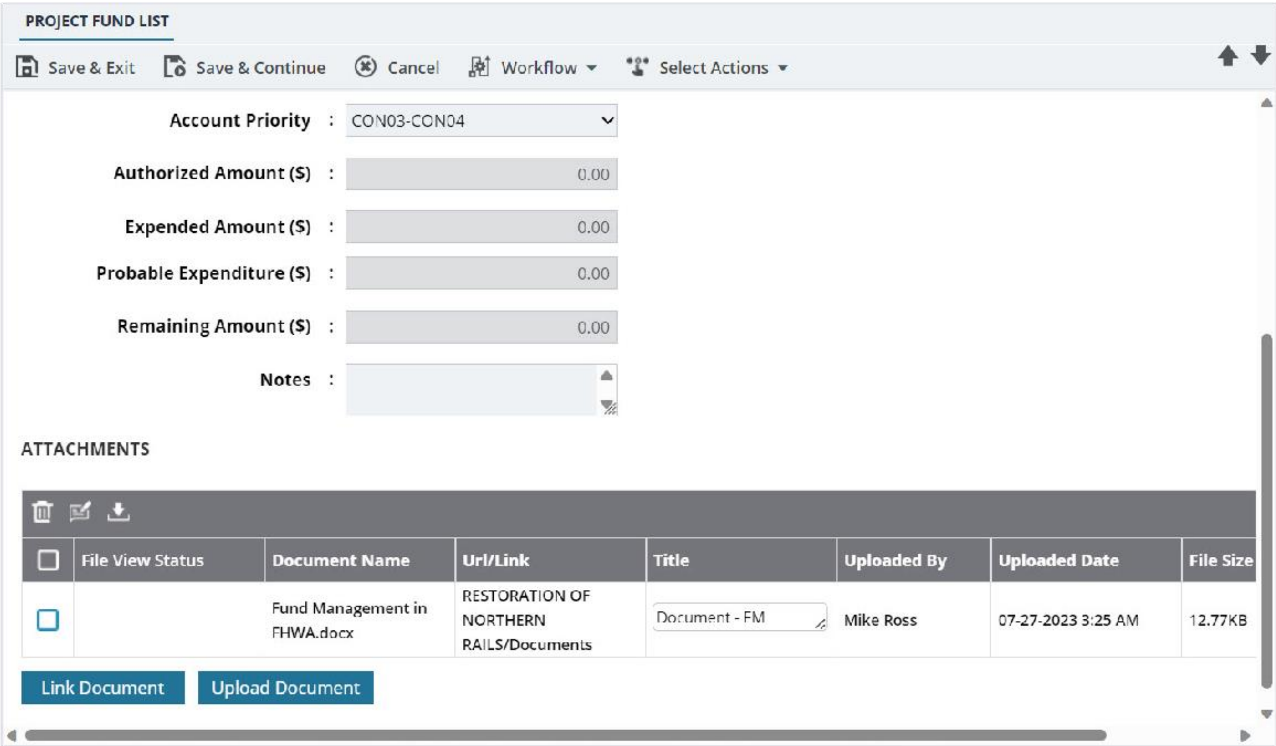


Figure 89: Linked Document

Note: The **Url/Link** column displays the path to the folder where the document is available. You can click the folder path to open the folder.

6. In the **Title** column, enter the titles for the linked files.

Linking a File to a Form – Upload and Link New Document Option

To upload a file to a folder in the Documents folder structure and link the file to the respective form, perform the following steps:

Note: The Upload and Link New Document option is the most preferred and used method to link files to a form by the FLH team.

1. In the **ATTACHMENTS** section, click **Link Document**.

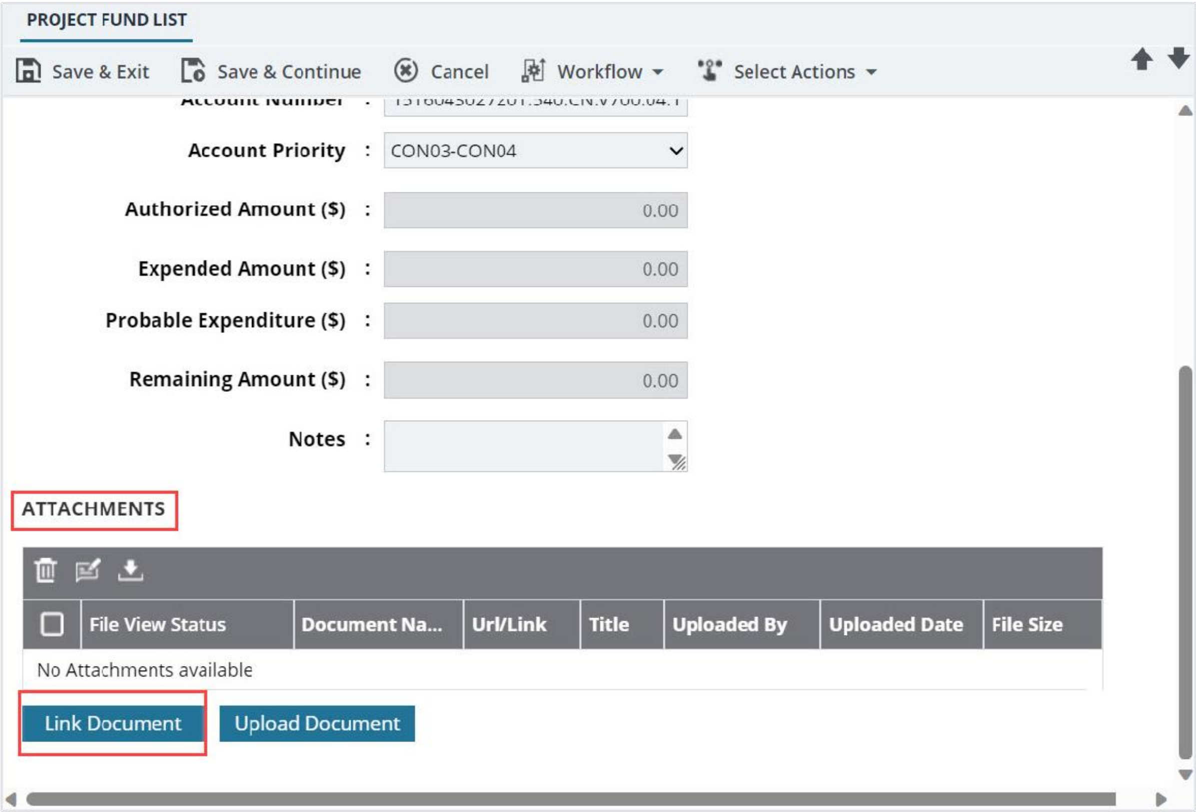


Figure 90: Using Link Document Option

The **Link Document** dialog box is displayed.

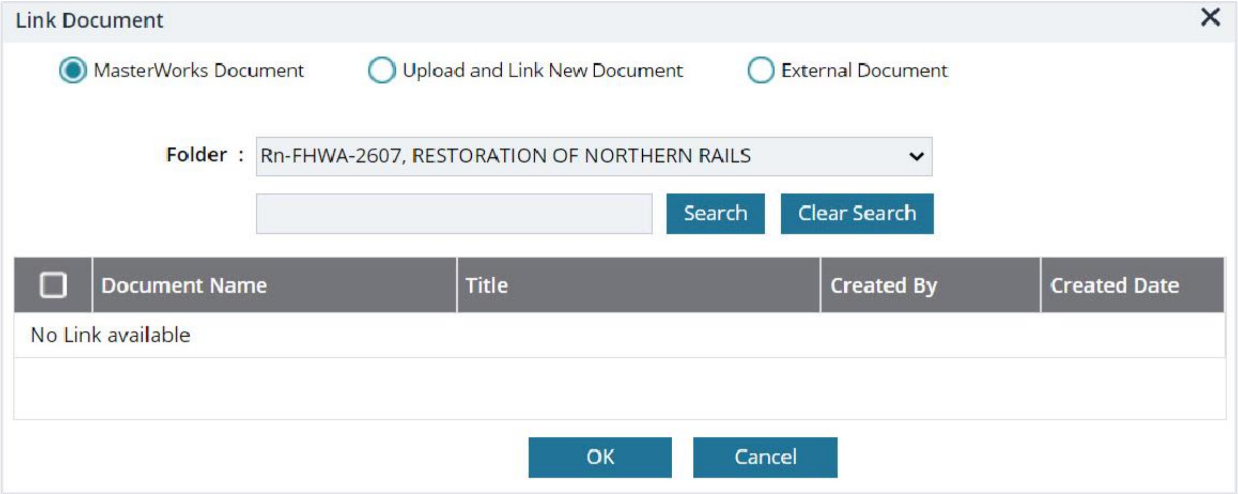


Figure 91: Link Document Dialog Box

2. Click **Upload and Link New Document**.

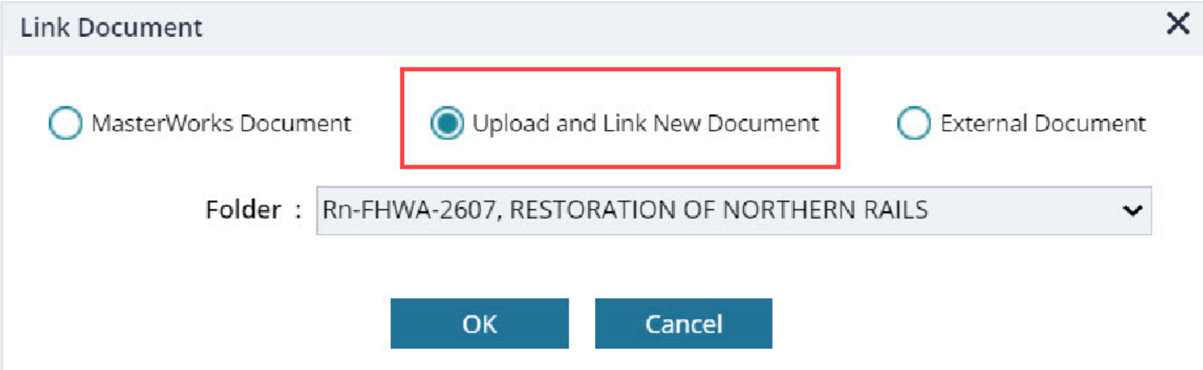


Figure 92: Using Upload and Link New Document Option

3. In the **Folder** drop-down list, select the appropriate folder to upload files.
4. Click **OK**.
   A confirmation dialog box is displayed.
5. Click **OK**.
   The **NEW DOCUMENT** page is displayed.

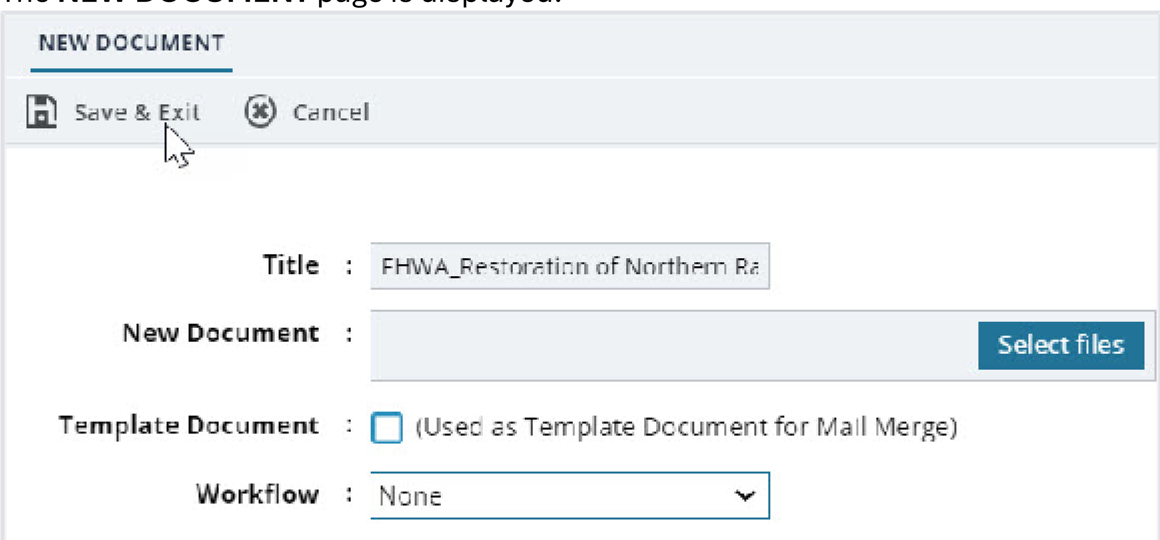


Figure 93: New Document Page

6. To upload files, in the **New Document** section, drag and drop the appropriate files.
   On uploading and saving the files, the files are uploaded to the selected folder in the Folder drop-down list and linked to the respective form.
7. In the **Title** column, enter the titles for the linked files.

Linking a File to a Form – External Document Option

To link a file to an external storage system, perform the following steps:

1. In the **ATTACHMENTS** section, click **Link Document**.

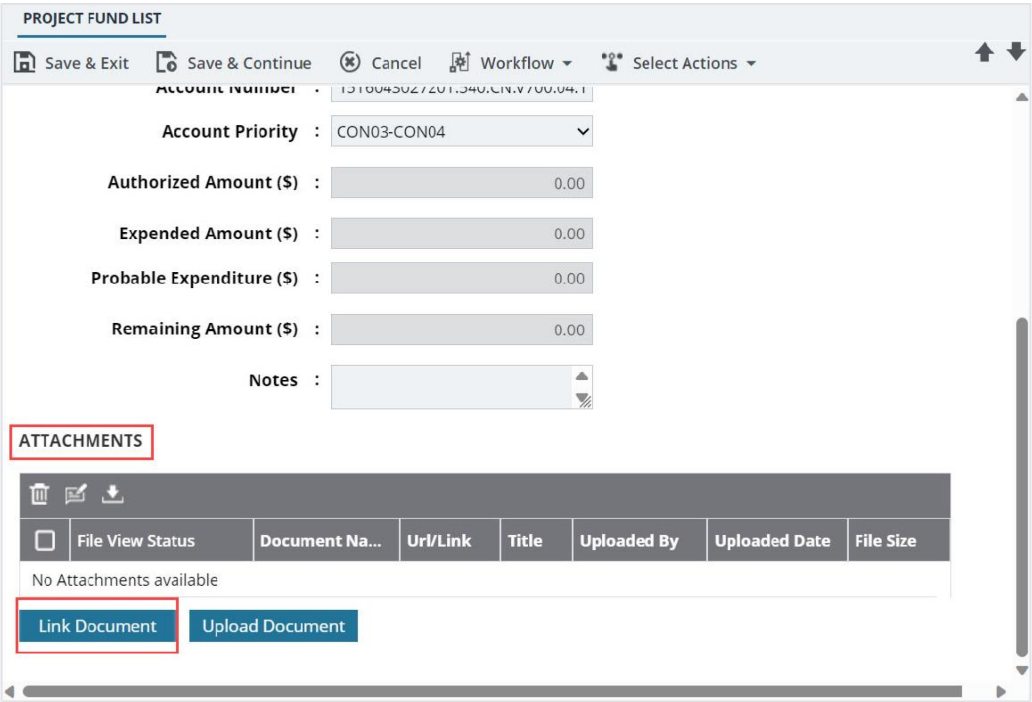


Figure 94: Using Link Document Option

2. Click **External Document**.

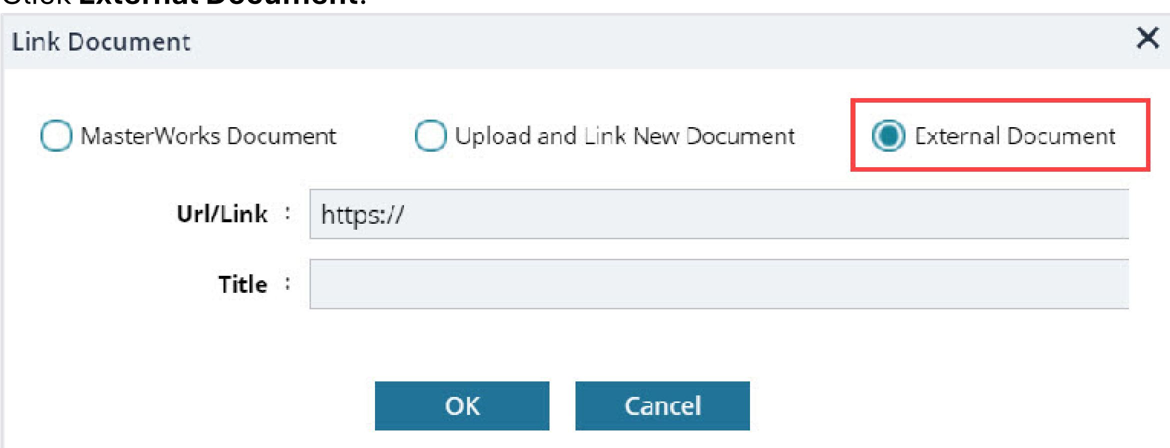


Figure 95: Using External Document Option

3. In the **URL/Link** box, enter the URL to the file in the external storage system.
4. In the **Title** box, enter the title for the linked file.
5. Click **OK**.
   The file is linked to the form and is displayed in the **ATTACHMENTS** section.

4.1.2. Attaching a File to a Workflow

Overview

You can upload files to the specific records of a form while performing a workflow action. The **Project Fund List** form is used for illustration purposes.

Steps

1. In the list page of a form, select the appropriate record.

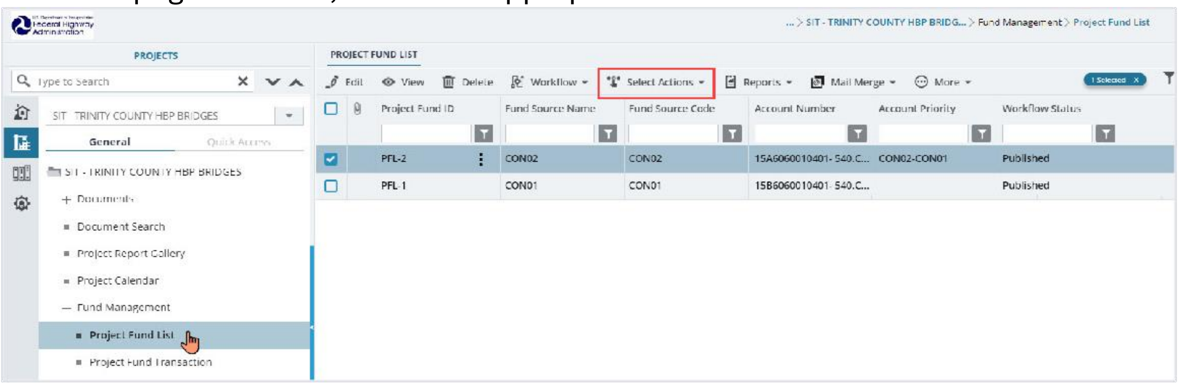


Figure 96: Using Select Actions Option

2. Click **Select Actions**  , and then click the appropriate workflow action.
   The **Masterworks** dialog box is displayed.

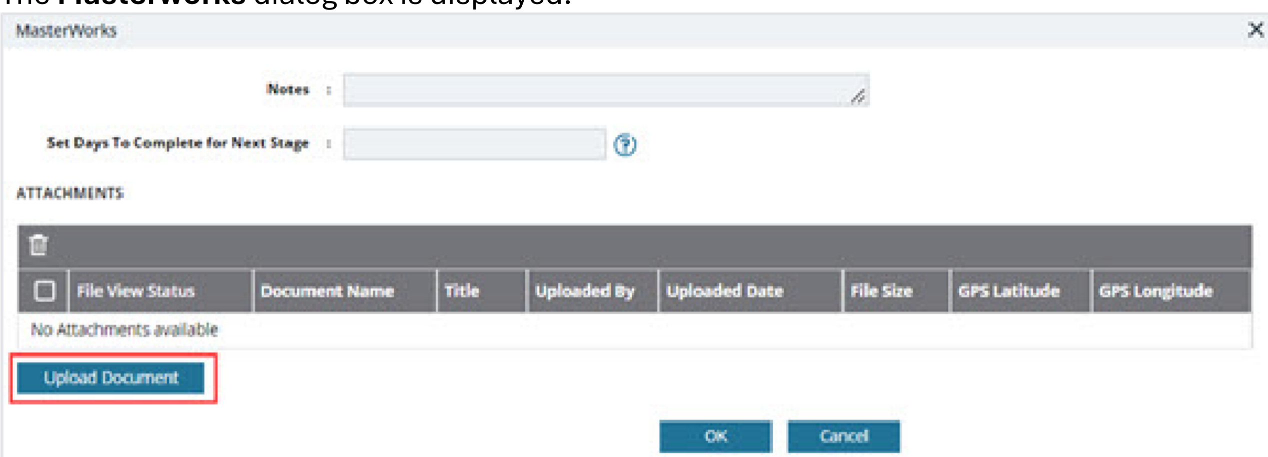


Figure 97: Masterworks Dialog Box

3. In the **ATTACHMENTS** section, click **Upload Document**.
   The **Open** dialog box is displayed.

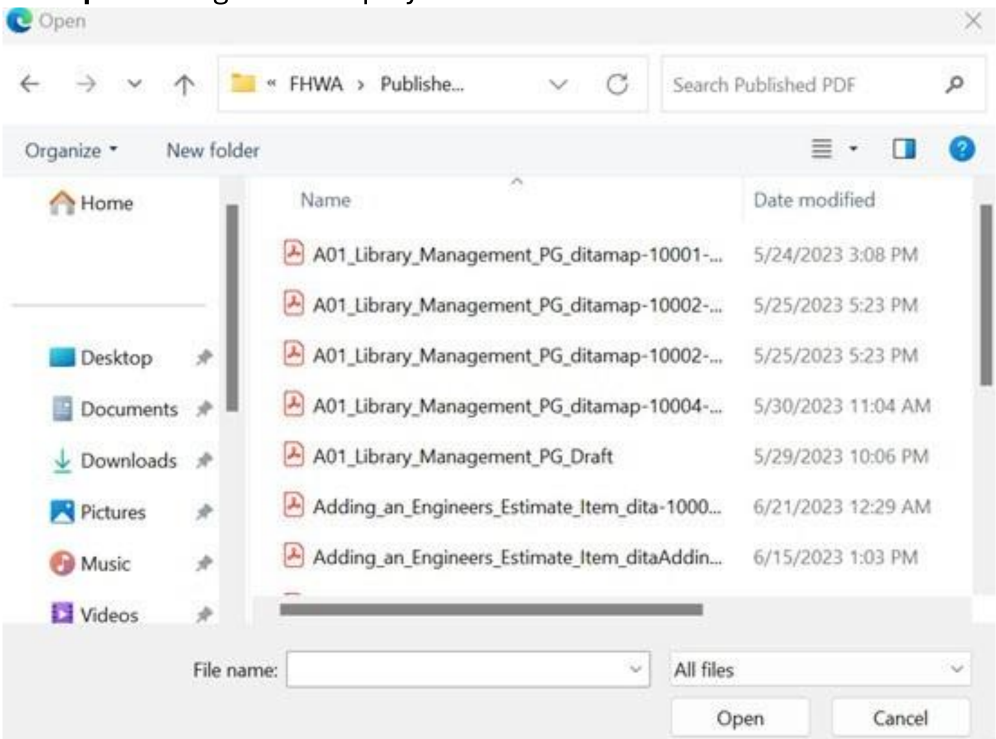


Figure 98:Open Dialog Box

4. To upload a single file, click the required file.
   Optionally, to upload multiple files, press and hold **CTRL**, and then click the required files.

5. Click **Open**.

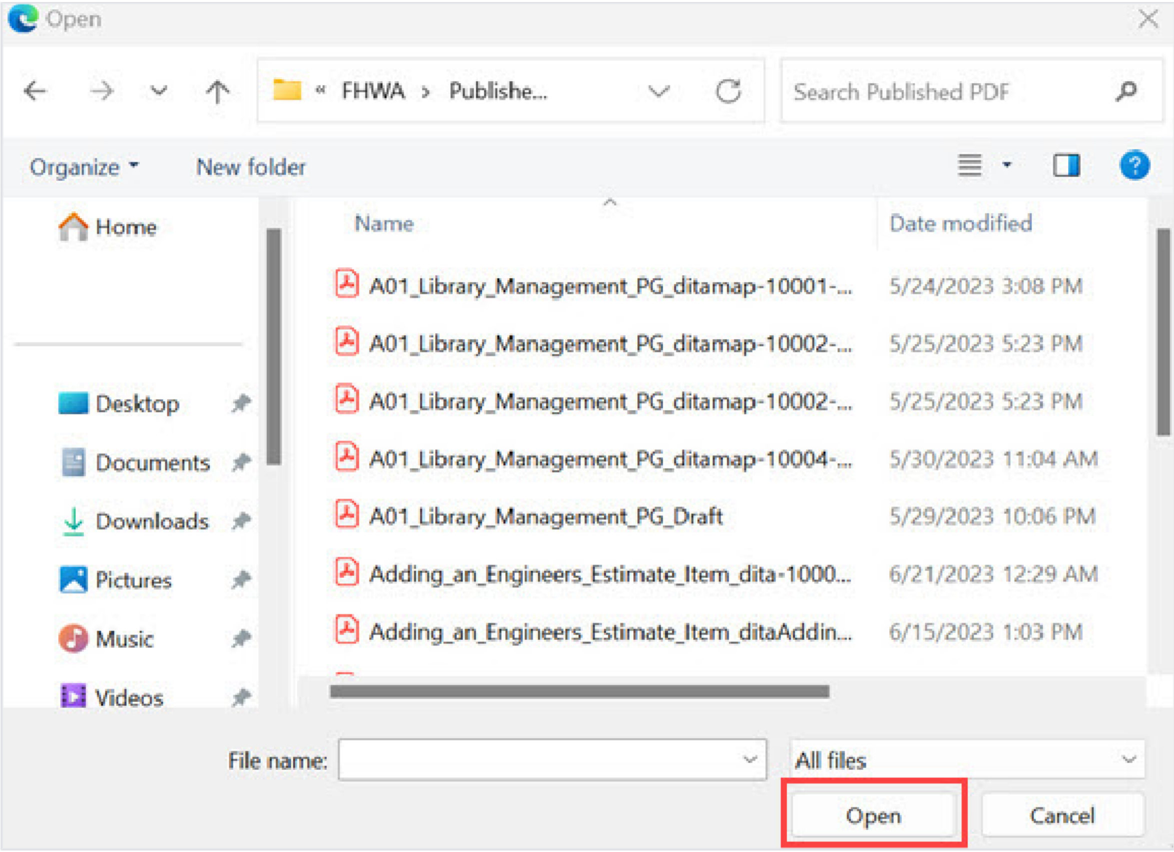


Figure 99: Using Open Option

The name of the file is automatically updated in the Document Name column

6. Optionally, in the **Title** column, enter the title for the attached file.

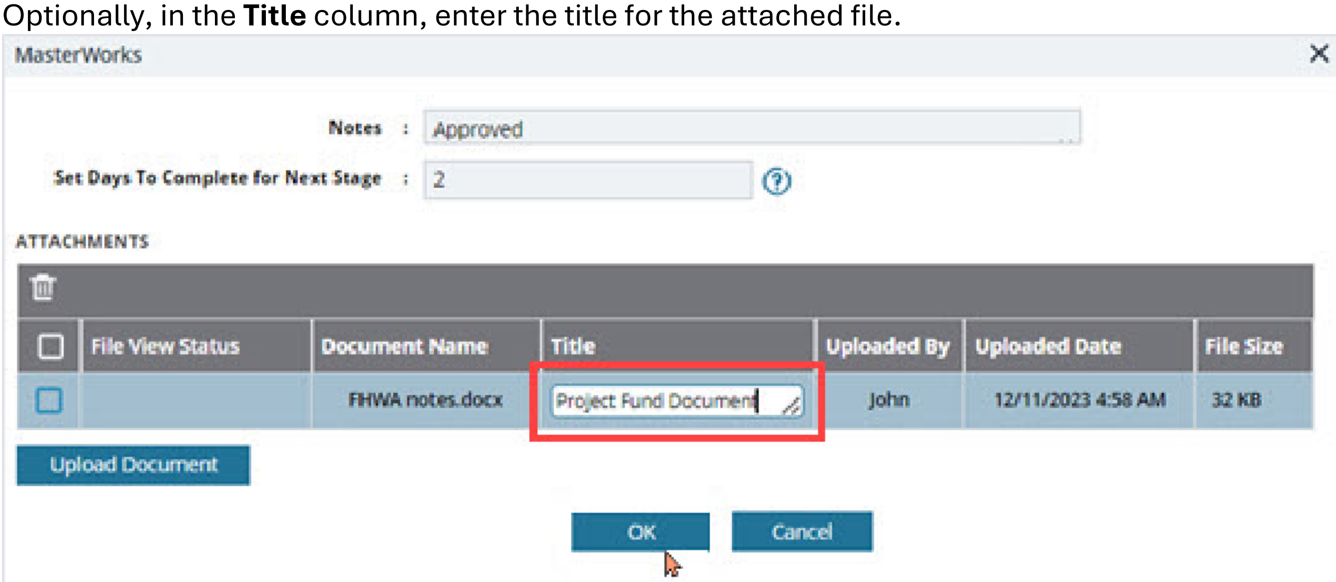


Figure 100: Updating Title for the Attached File

7. Click **OK**.
   You can access the attached file from the **Workflow Status and History** dialog box.
   For more information, refer to Section 4.2.2. Viewing the Workflow History

4.1.3. Accessing and Downloading Attached Files

You can access files that are attached to forms and workflows.
The **Project Fund List** form is used for illustration purposes.

- To access files attached to a form (from the list page):
  1. In the navigation pane, click the required form.
     The form list page is displayed.

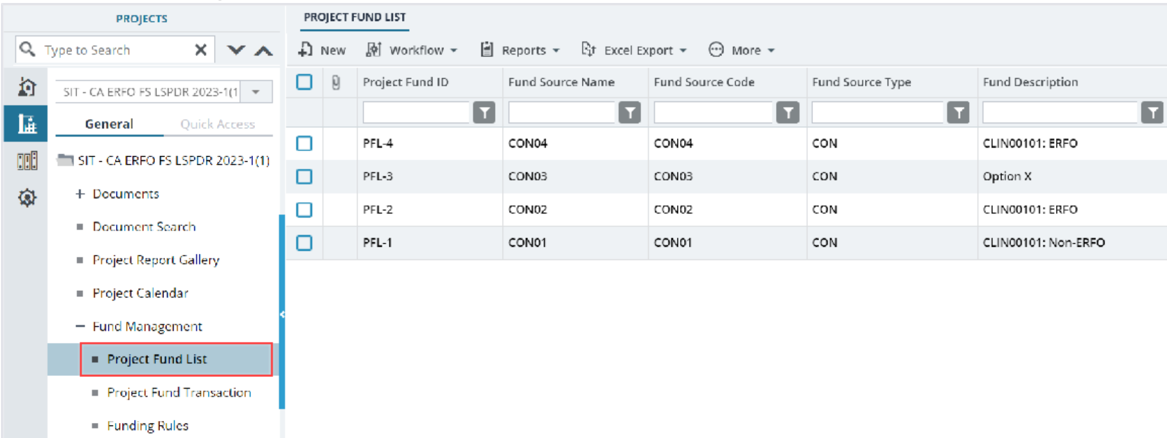


Figure 101: Project Fund List Page

2. Click **More**, and then click **Attachments**.

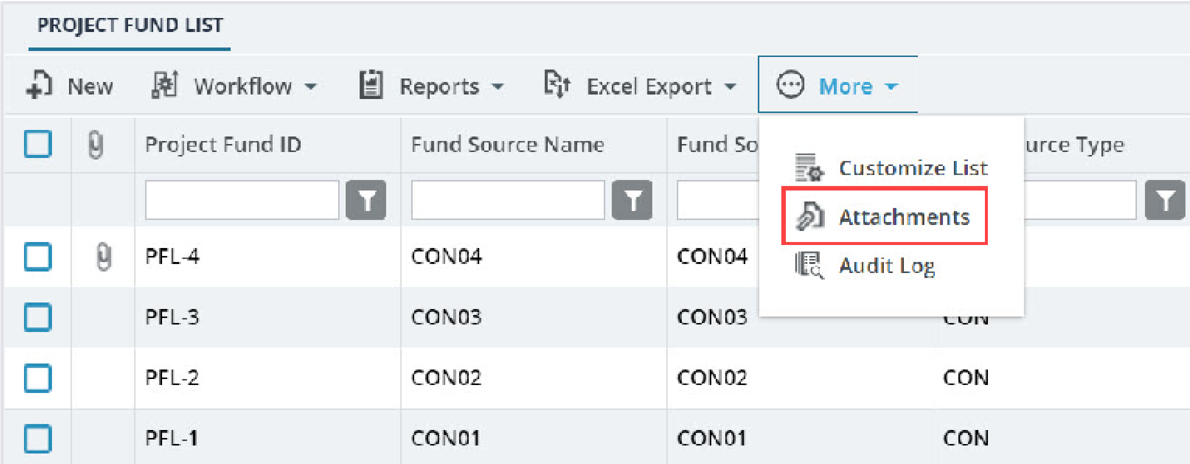


Figure 102: Using Attachments Option

The attachments of all the records are listed.

Figure 103: List of Attachments

Optionally, to view files attached to a record, select the appropriate record and then click **Attachments**.

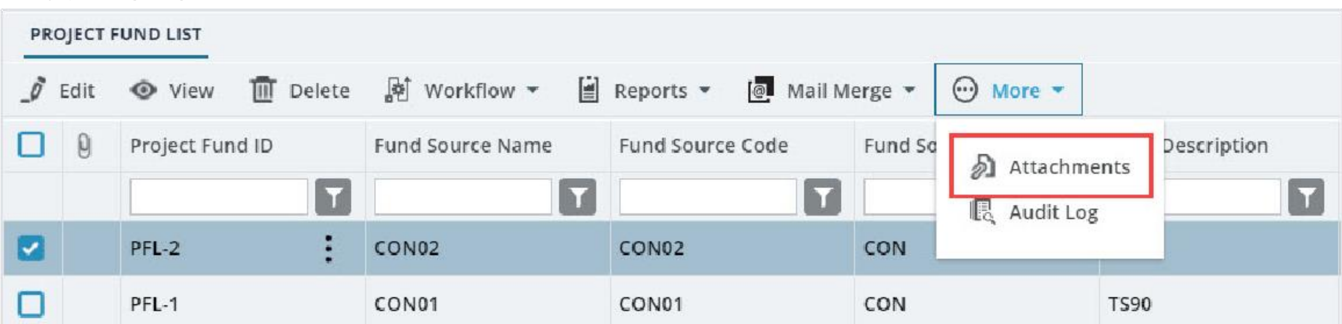


Figure 104: Viewing Files Attached to a Record

- To access and download files attached to a record (from the details page):

1. In the navigation pane, click the appropriate form.
   The form list page is displayed.

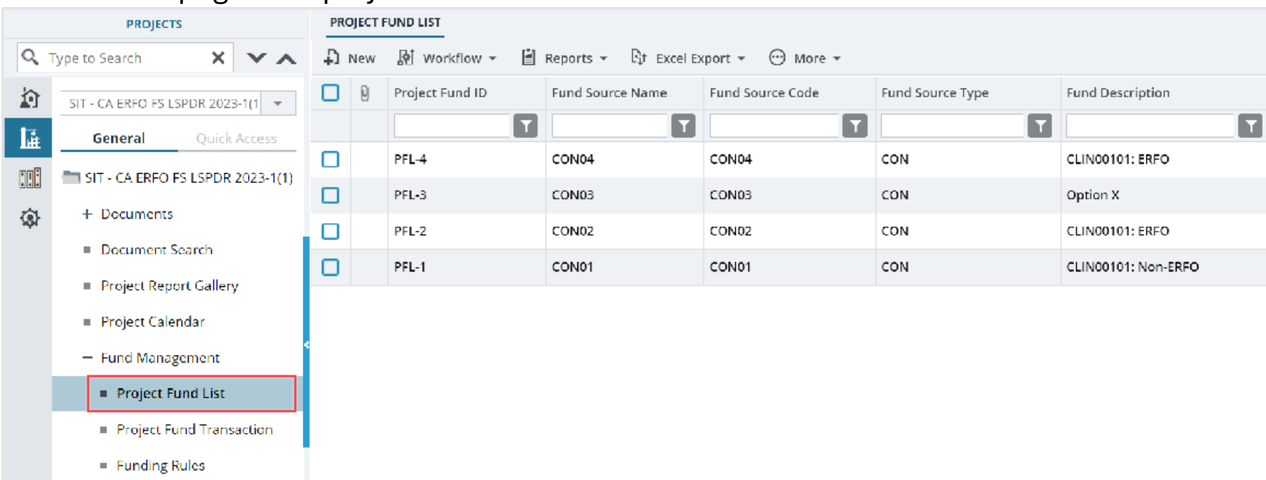


Figure 105: Project Fund List Page

2. In the list page, select the appropriate record, and then click **View**.
   The form details page is displayed.

Figure 106: Using View Option

3. In the **ATTACHMENTS** section, select the appropriate files, and then click .

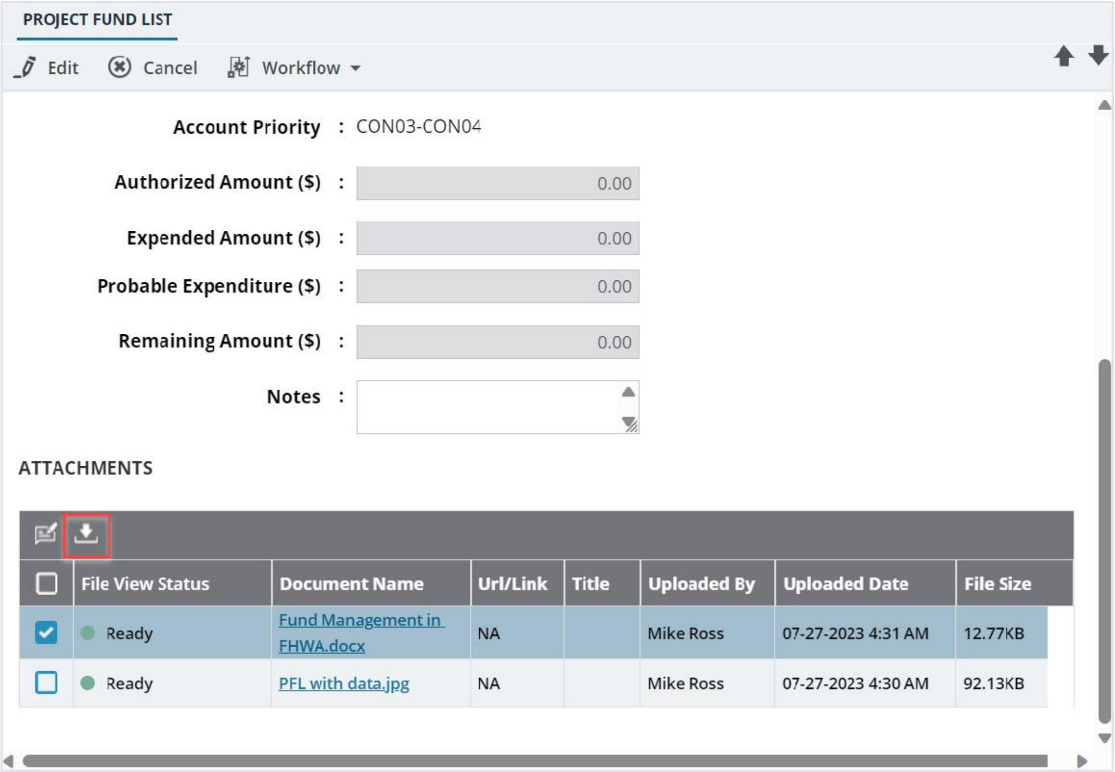


Figure 107:: Project Fund List Page in View Mode

- To access and download files attached to a workflow:
  1. In the navigation pane, click the appropriate form.
     The form list page is displayed.

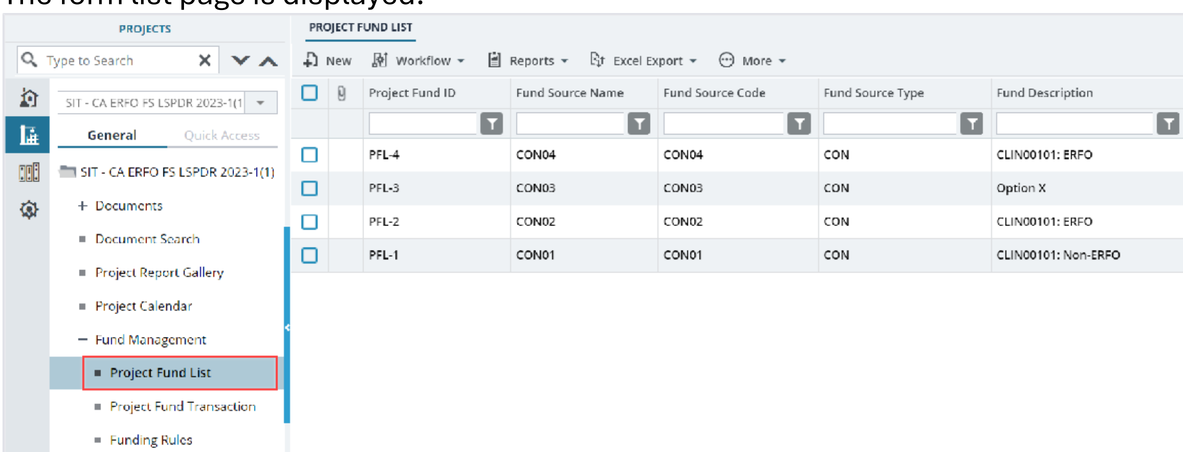


Figure 108: Project Fund List Page

  2. In the list page, select the appropriate record.

3. In the **WORKFLOW** group, click **History**.
   The Workflow Status & History dialog box is displayed.

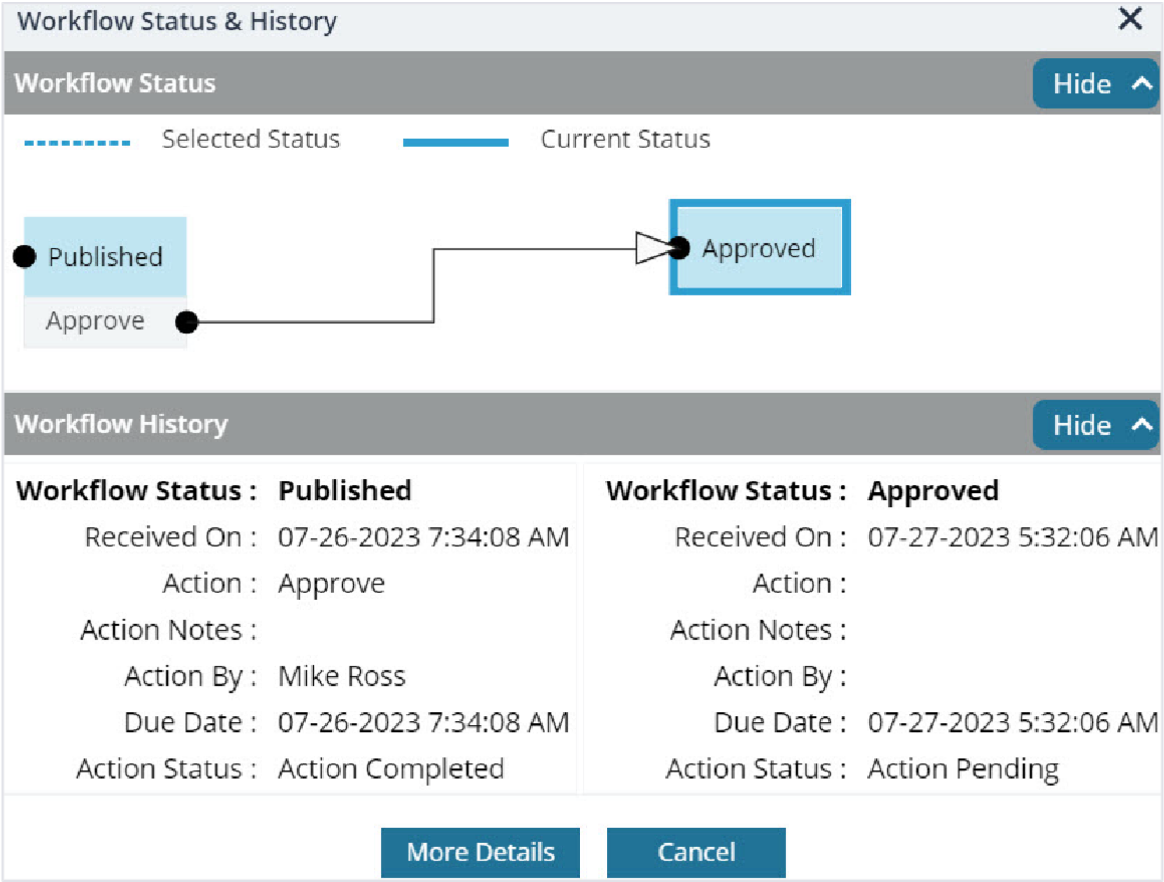


Figure 109: Workflow Status & History Dialog Box

4. To view all the attachments and complete workflow history, click **More Details**. The **History** page is displayed.

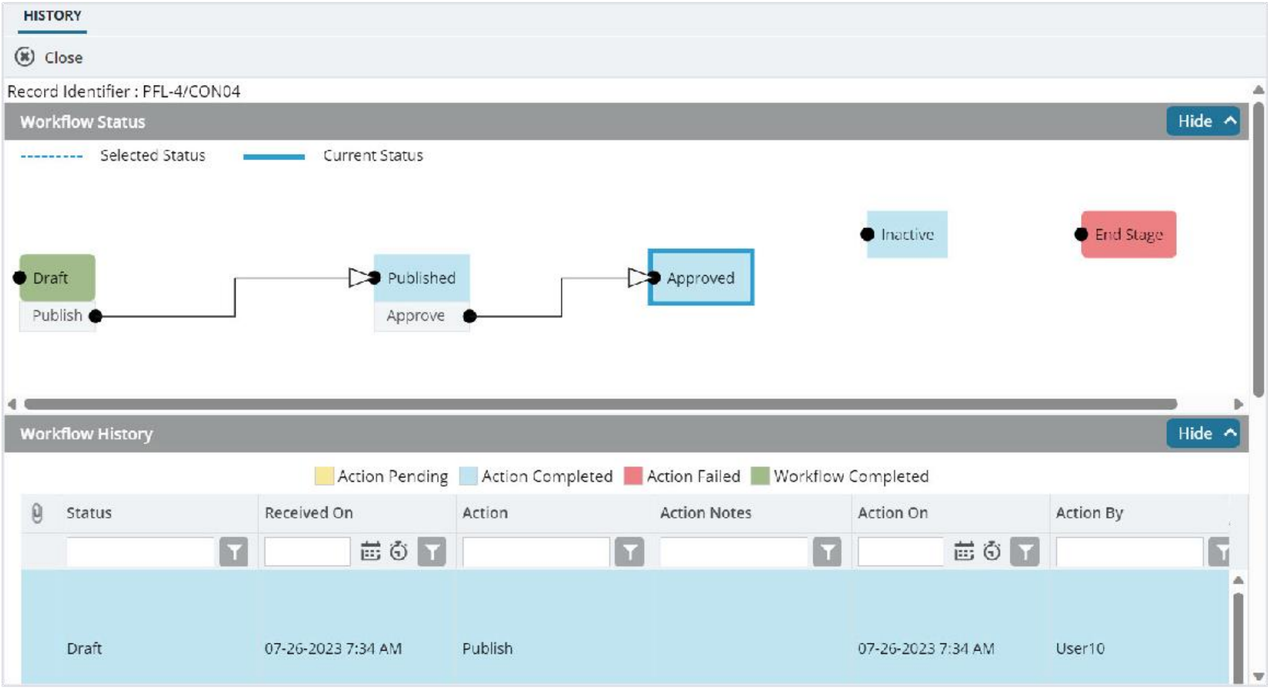


Figure 110:History Page

5. In the **ATTACHMENTS** section, select the appropriate documents, and then click .

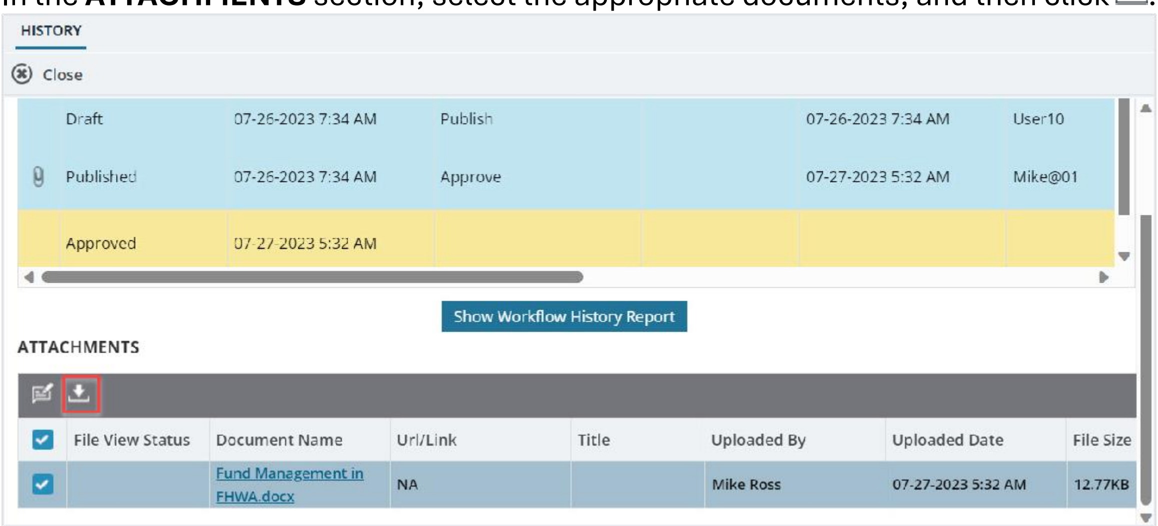


Figure 111: Using Download Option

4.1.4. Deleting Attached Files

Prerequisites

You can delete a file only if you have attached it.

Overview

You can delete files that are attached to forms. You cannot delete files that are attached while performing a workflow action.

The **Project Fund List** form is used for illustration purposes.

Steps

1. To access the appropriate file attached to a form to be deleted, perform the following steps:

    a. In the navigation pane, click the appropriate form.
    The form list page is displayed.

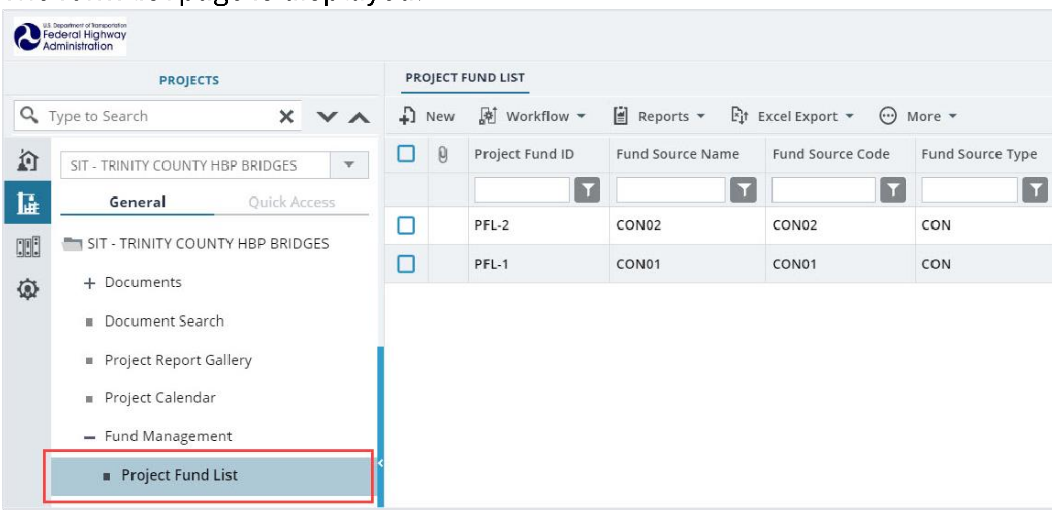


Figure 112: Project Fund List Page

    b. Click **More**, and then click **Attachments**.
    The attachments of all the records are listed.

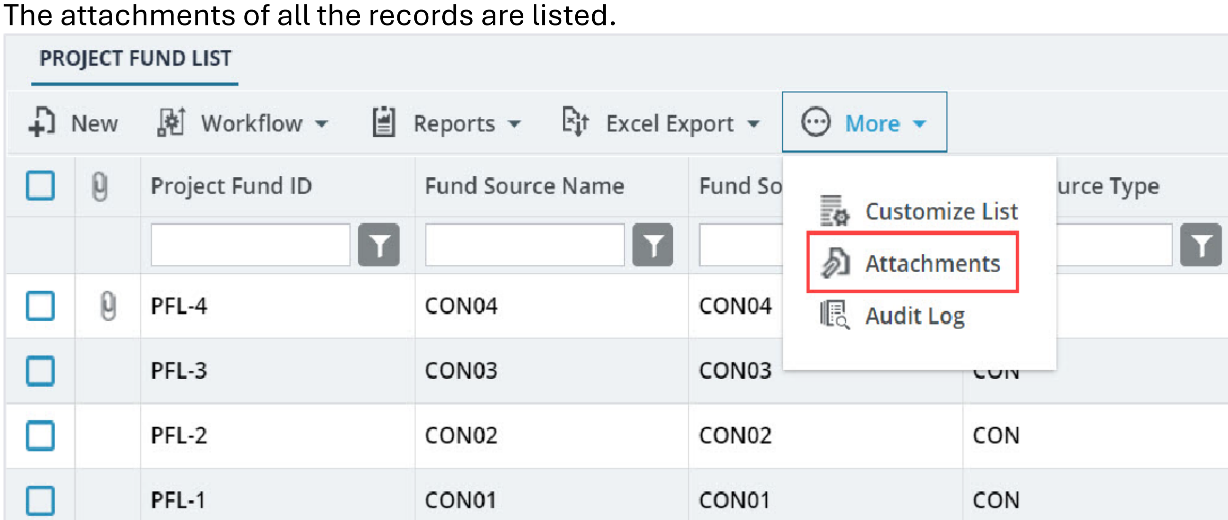


Figure 113: Using Attachments Option

c. Various document management features are available for attachments.

Figure 114: List of Attachments

2. To delete an attachment, select the appropriate file, and then click .

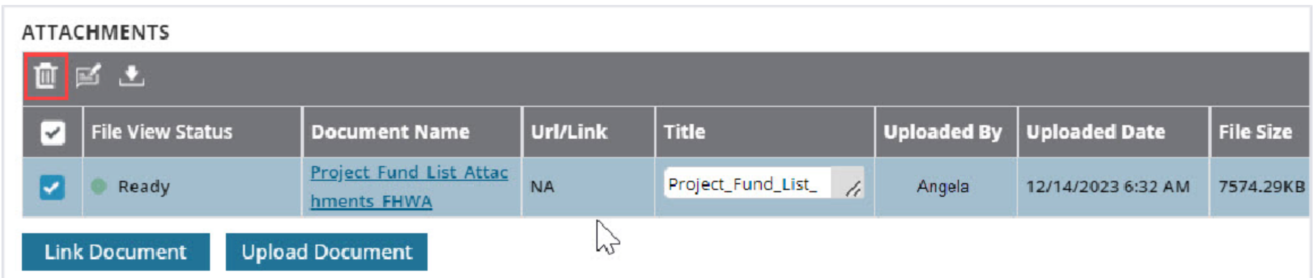


Figure 115: Using Delete Option

4.2. Standard Report Functions

Performing all report-related activities is similar in procedure throughout the application.
All tasks that you can perform are based on the roles assigned to you in a project and the permissions granted to the roles.

For information on roles, refer to **Security Roles** in the **A02 Administrator Guide**.

The standard report functions include the following:

- 4.2.1. Generating and Viewing Reports
    - 4.2.1.1. Generating a report
    - 4.2.1.2. Printing a report
    - 4.2.1.3. Saving a report in various formats
    - 4.2.1.4. Updating report to view the latest information
- 4.2.2. Subscribing to a report

4.2.1. Generating and Viewing Reports

You can generate reports for different information views for all the forms in the application. Masterworks enables you to use report filters to generate reports with specific information.
You can perform the following report functions:

- 4.2.1.1. Generating a report
- 4.2.1.2. Printing a report
- 4.2.1.3. Saving a report in various formats
- 4.2.1.4. Updating report to view the latest information

4.2.1.1 Generating a report

Overview
You can generate various reports that comprise information based on the roles assigned to you and the various projects to which you are invited.
For a few reports, you can use the filter criteria to provide information for the relevant fields and generate the reports.

The **Project Fund List** form is used for illustration purposes.

Steps
1. Perform any of the following steps, as applicable:
   - In the form list page, click **Reports**, and then click the appropriate report.

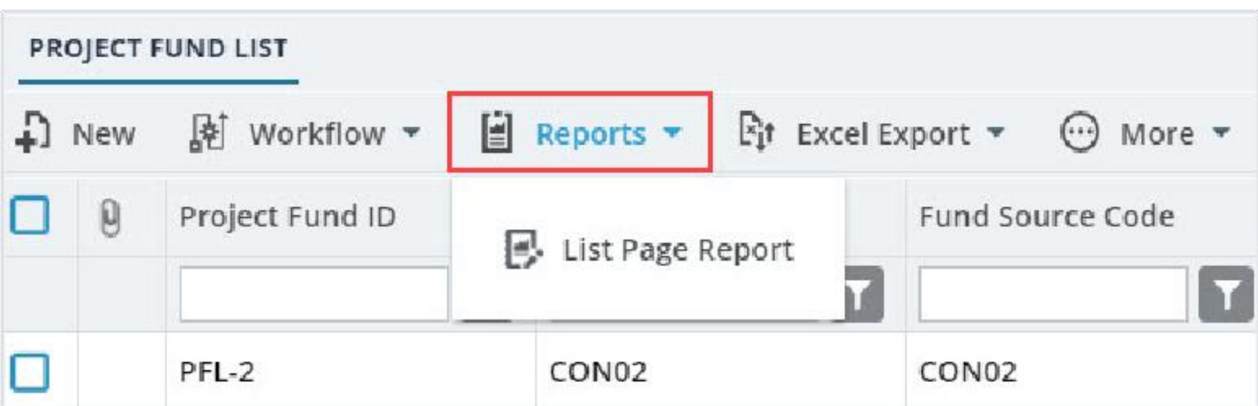


Figure 116: Using Reports Option

- In the project navigation pane, click **Project Report Gallery**, and then double-click the appropriate report.

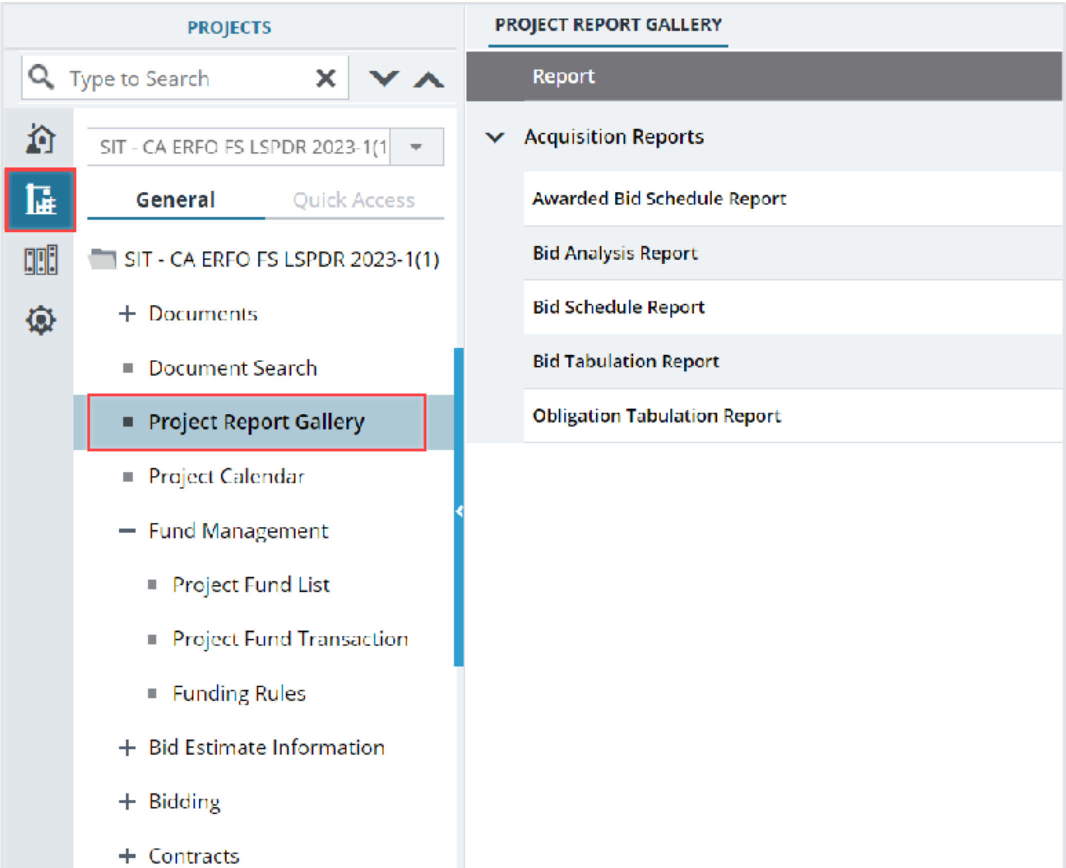


Figure 117: Project Report Gallery Navigation Page

- In the project navigation pane, expand the contract folder, click **Contract Report Gallery**, and then double-click the appropriate report.

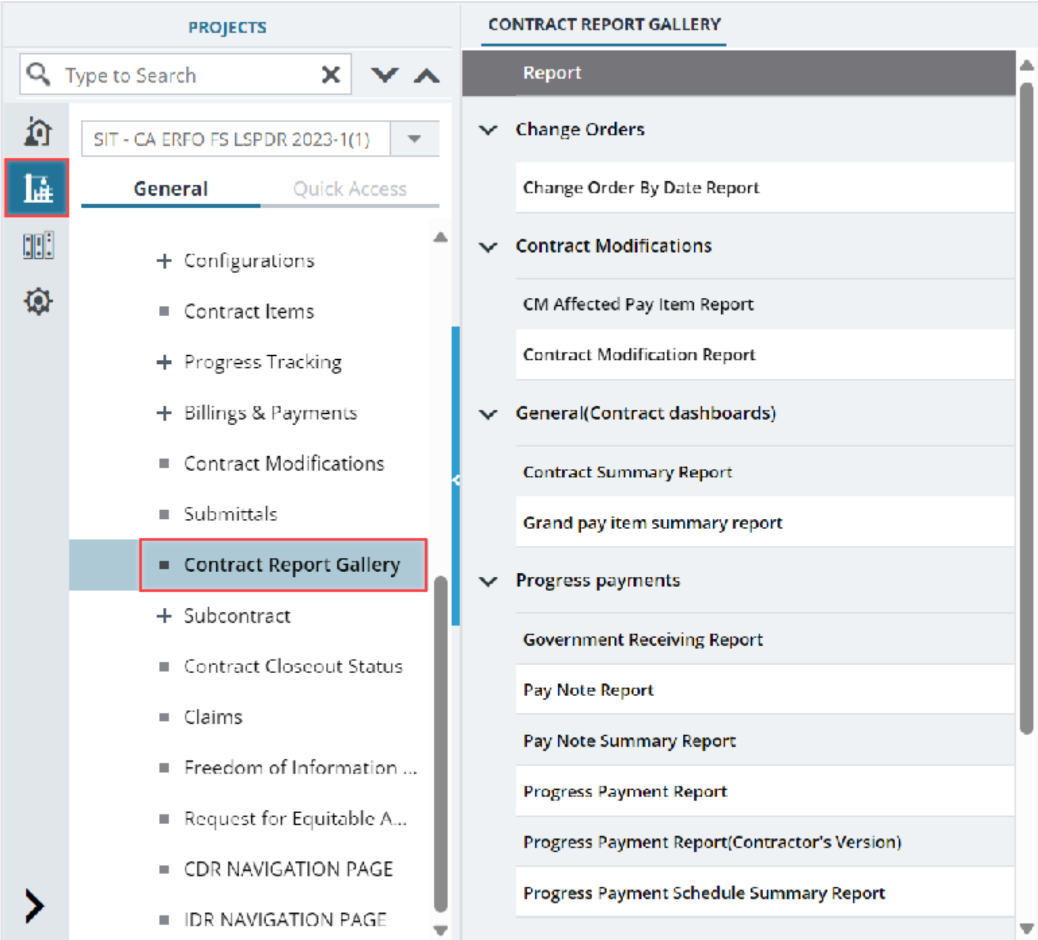


Figure 118: Contract Report Gallery Navigation Page

2. If filtering options are necessary, select the appropriate information in the relevant fields, and then click **View Report**.
   The report is generated and displayed.

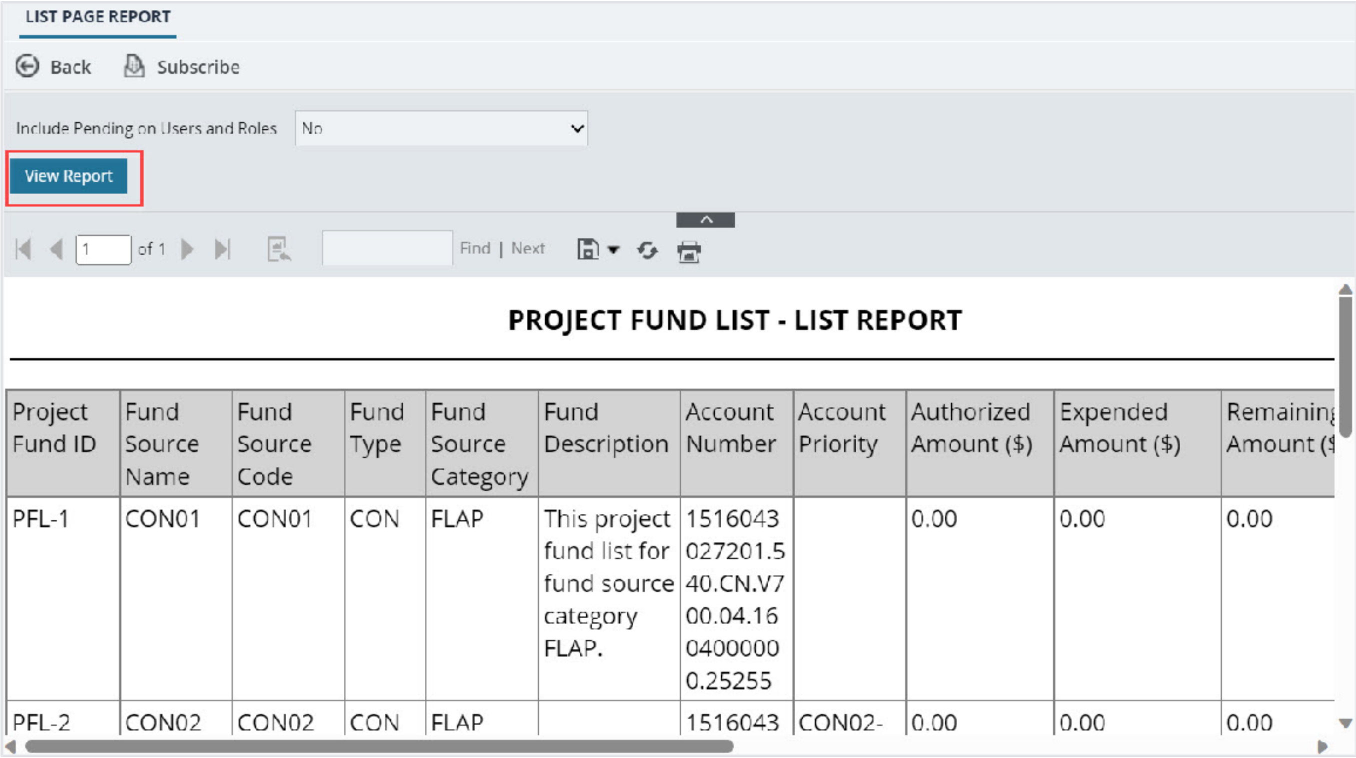


Figure 119: Using View Report Option

4.2.1.2 Printing a Report

Steps

1. Generate the required report.
   For more information, refer to Section 4.2.1.1. Generating a Report.

2. In the report toolbar, click **Print Report** .

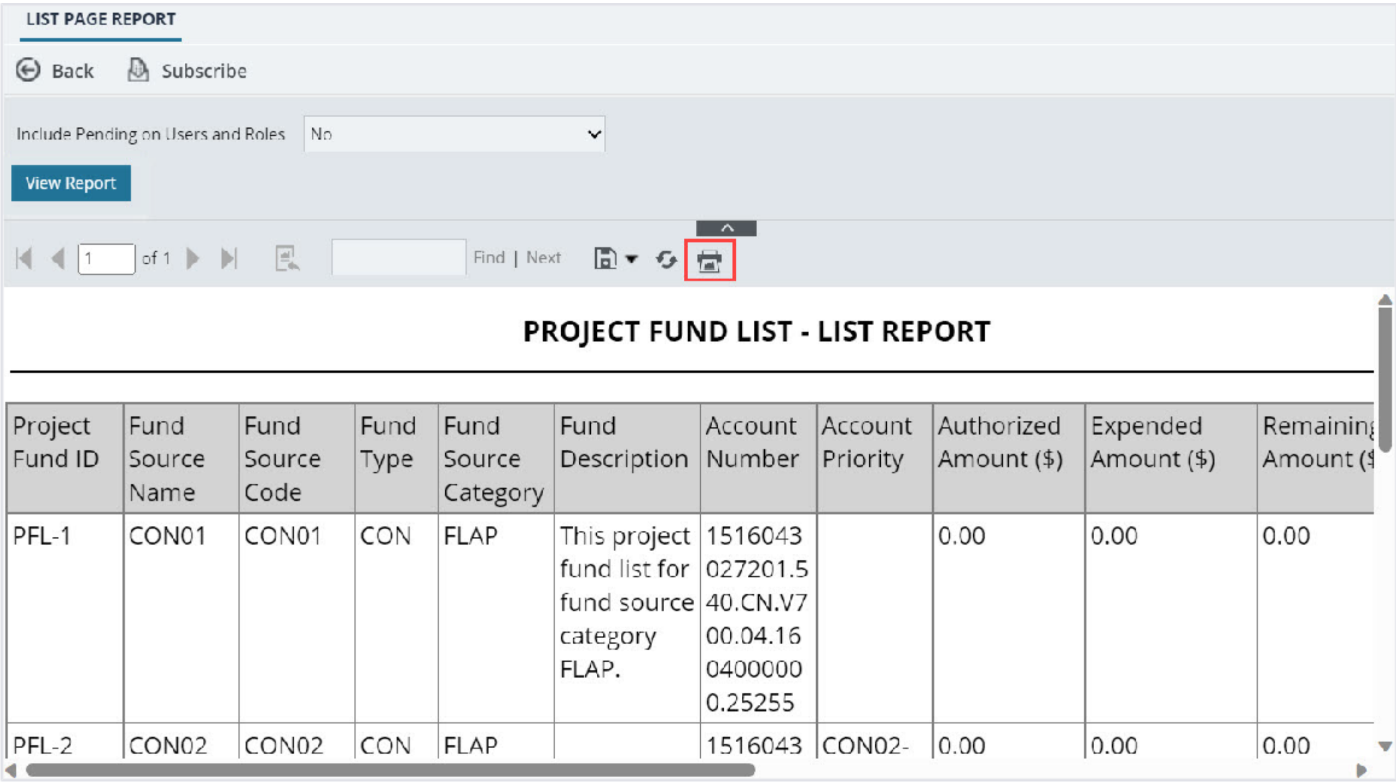


Figure 120: Using Print Report Option

4.2.1.3 Saving a Report

Steps

1. Generate the required report.
   For more information, refer to Section 4.2.1.1. Generating a Report

2. In the report toolbar, click **Export**, and then click the required option.

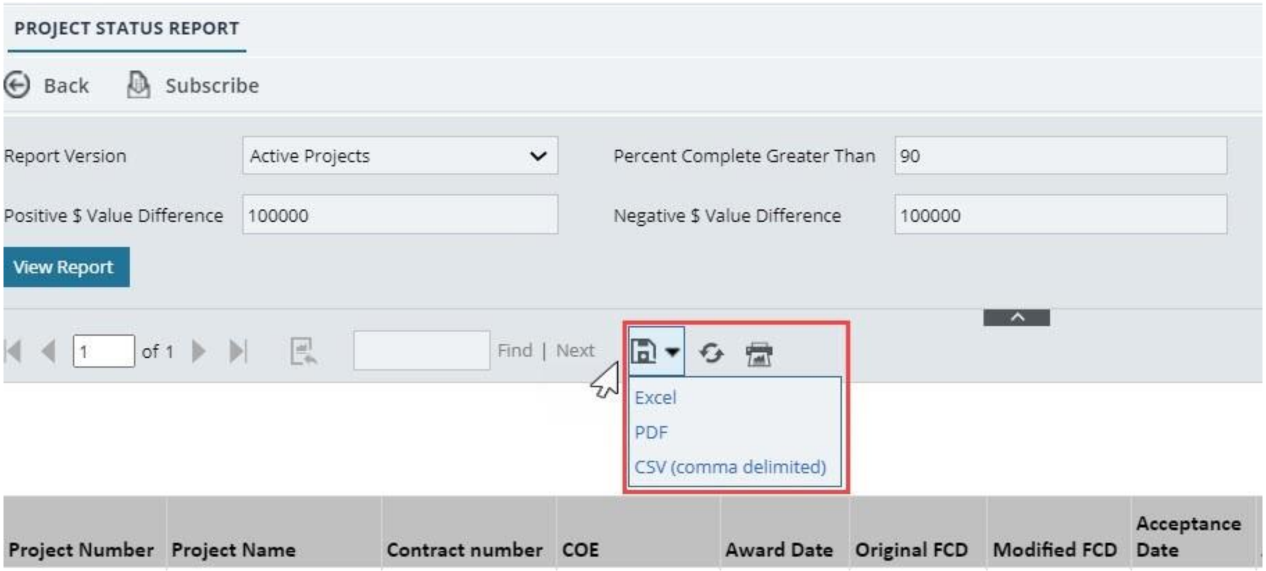


Figure 121: Exporting a Report

4.2.1.4 Viewing Latest Information in a Report

Steps

1. Generate the required report.
   For more information, refer to [Section 4.2.1.1. Generating a Report](#)
2. In the report toolbar, click **Refresh**

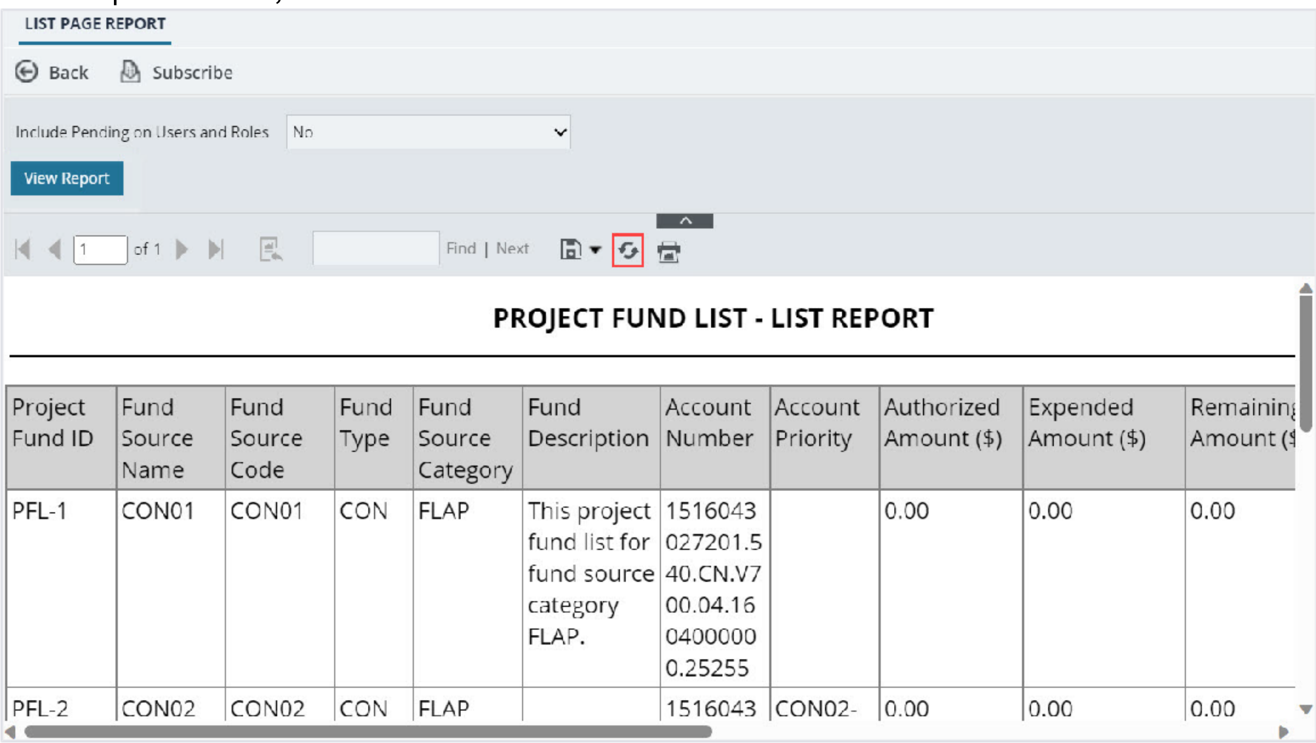


Figure 122: Using Refresh Option

4.2.2. Subscribing to Reports

Prerequisites

- You must have access to the report.
- The logged-in user is assigned with the permission to generate the report.

Overview

You can subscribe to reports, and subscribed reports are delivered to the specified email addresses or saved in the specified file location. You can configure subscriptions so that the reports are delivered periodically in the specified format.

Additionally, you can create multiple subscriptions for a single report with varied subscription options.

You can subscribe to a report using any of the following methods:

- Email: The report is delivered through email to the specified email addresses in the specified formats.
  Note: Only Masterworks registered email address is allowed to receive the subscribed reports.

- File Share: The reports are saved to the specified location in the specified formats

Note: Users with the appropriate permission can subscribe themselves or others to a report. Only users with the **Administrator** role can remove or end an active subscription once it is created.

Steps

1. Open a report, and then click 

.

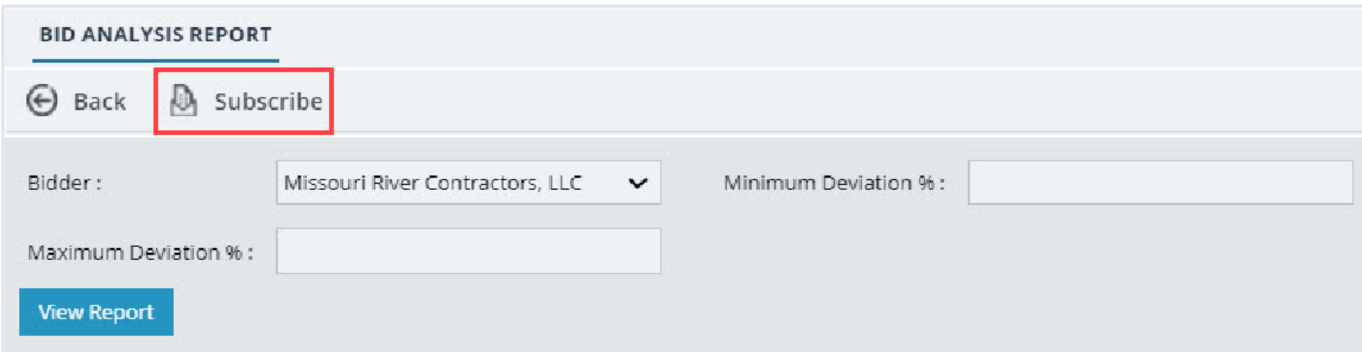


Figure 123: Subscribing a Report

The subscription dialog box is displayed.

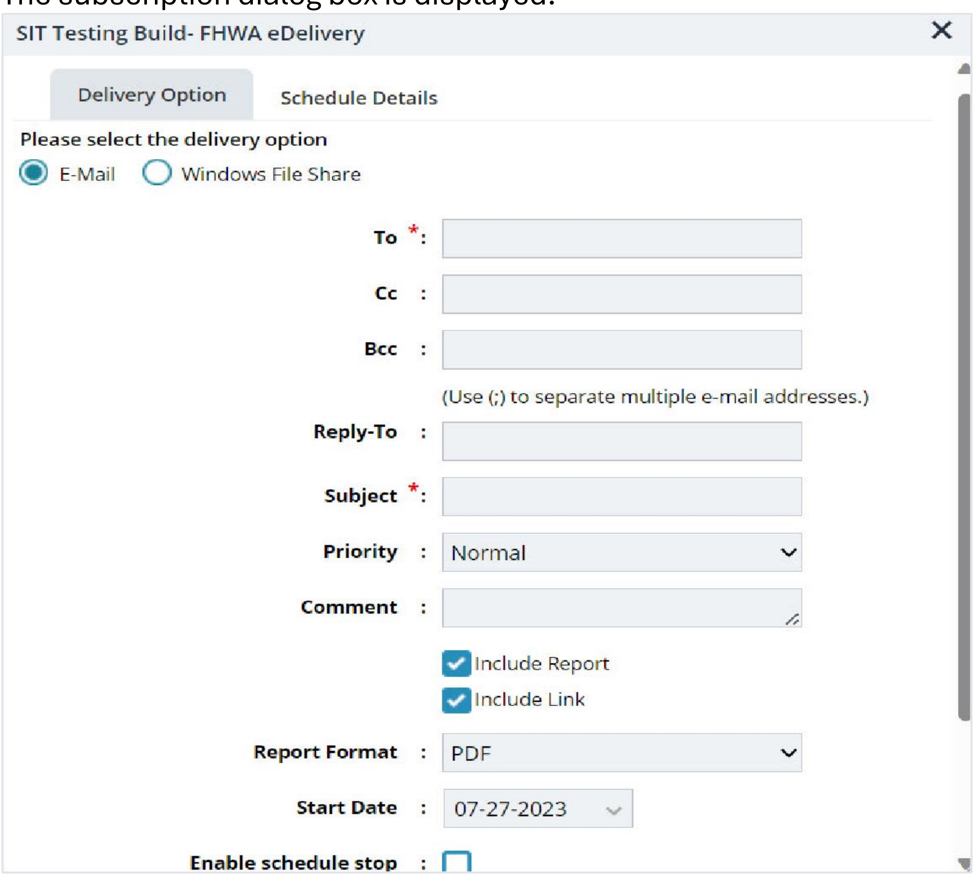


Figure 124: Subscription Dialog Box

Note: To subscribe to a report, you must fill the fields with red asterisks.

2. In the **Please select the delivery option** section, perform either of the following steps, as applicable:
    - Click **E-Mail** to receive the report through email.
    - Click **Windows File Share** to save the report to the specified location.

3. Based on the delivery option selected, perform the following steps:

E-Mail	Windows File Share
a. In the **To** box, enter the email addresses of the recipients of the report. b. In the **Reply-To** box, enter the email addresses of the recipients to whom the reply email must be delivered. c. In the **Subject** box, enter the name of the report or any other appropriate subject for the email. d. From the **Priority** drop-down list, select the priority of the email. If the selected priority is High, the email will be sent as a High Priority notification. e. In the **Comment** box, enter any comment for the email. Comments are included in the body of the email. f. Select the **Include Report** check box to deliver the report in the selected format as an email attachment. g. Select the **Include Link** check box to deliver the link to the report in the report delivery email. The recipient can view the report on the application only if the recipient has the required permissions on the report. h. From the **Report Format** drop- down list, select the format in which the report must be generated and delivered to the specified email addresses. i. From the **Start Date** list, click the date from when the report must be delivered. j. Select the **Stop this schedule on** check box, and then select the date until the report must be delivered.	a. In the **File Name** box, enter the file name for the report. b. Select the **Add** a file extension when the file is created check box to save the report file name with the extension of the file format as required for the report. c. In the **Path** box, enter the path of the shared file location where the report must be saved. **Note**: To configure the shared file location in the application, you must provide the file path location to the **Administrator**. d. From the **Report Format** drop-down list, select the format in which the report must be generated and saved. e. In the **Credentials** used to access the file share section, enter the credentials to access the shared location and save the report. f. From the **Overwrite** options section, click any of the following options: • Overwrite an existing file with a newer version - When saving the report at the file location at the scheduled time, if a file with the same name exists, then the existing file is overwritten by the latest report. • Do not overwrite the file if a previous version exists - When saving the report at the file location at the scheduled time, if a file with the same name exists, then the report is not overwritten by the latest report, and the report is not saved at the file location. • Increment file names as newer versions are added - When saving the report at the file

	location at the scheduled time, if a file with the same name exists, then the latest report is saved with the same name appended with a sequential number. g. From the **Start Date** list, click the date from when the report must be saved. h. Select the **Stop** this schedule on check box, and then select the date up to when the report must be saved at the file location.

4. To set the frequency of report delivery, click the Schedule Details tab.

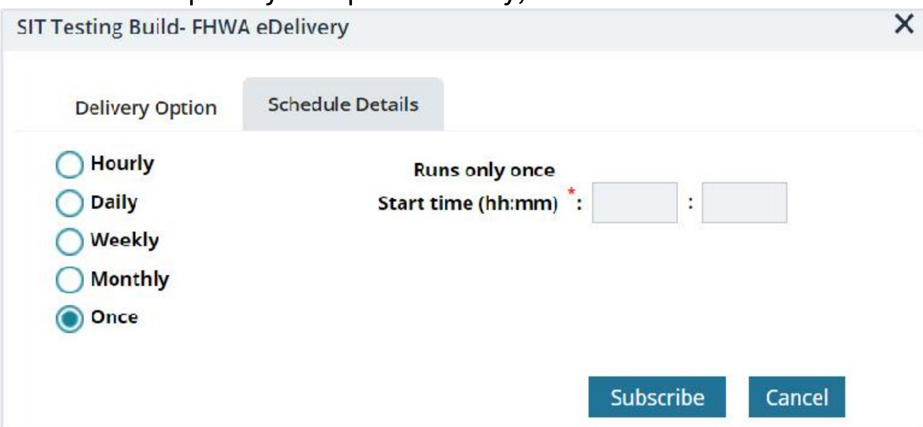


Figure 125: Schedule Details Tab

5. From the delivery frequency options, click the appropriate option:

Option	Description	Steps
Hourly	The report is delivered every preset number of hours.	a. Click **Hourly** in the delivery options list. b. In the **Run the schedule every** section, enter the frequency of report delivery: i. In the **hours** and **minutes** boxes, enter the time period in hours and minutes the report must be periodically delivered. ii. In the **Start time (hh:mm)** box, enter the time (in 24-hour format) the report delivery must begin.
Daily	The report is delivered once on preset days, or periodically as defined.	a. Click **Daily** in the delivery options list. b. In the schedule definition section, enter the frequency of report delivery: • Click **Every Weekday** to get the report delivered on all weekdays, from Monday to Friday. • Click **Repeat after this number of days**, and then, then in the box, enter the number of days

Option	Description	Steps
		to get the report delivered periodically once every specified number of days. c. In the **Start time (hh:mm)** box, enter the time (in 24-hour format) the report must be delivered.
Weekly	The report is delivered every preset number of weeks on preset days of the week.	a. Click **Weekly** in the delivery options list. b. Click **Repeat** after this number of weeks, and then in the box, enter the number of weeks to get the report delivered periodically once every specified number of weeks. c. In the On day(s) section, select the days on which the report must be delivered. d. In the Start time (hh:mm) box, enter the time (in 24-hour format) the report must be delivered.
Monthly	The report is delivered monthly on preset days of a selected week.	a. Click **Monthly** in the delivery options list. b. Select the months when the report must be delivered. c. Click one of the following options to schedule the delivery of the report: • **On week of the month** i. From the list of weeks, select the week the report must be delivered. ii. In the **On day(s)** section, select the days the report must be delivered in the week previously selected. • **On Calendar day(s)** ○ In the box, enter the number of days of the month the report must be delivered, starting from the current day. For example, if the current day is the 12th of a month, and the calendar days set is 10, then the report is sent for 10 days from the 12th of every selected month. d. In the Start time (hh:mm) box, enter the time (in 24-hour format) by when the report must be delivered.
Once	The report is delivered once on the current day.	In the **Start time (hh:mm)** box, enter the time (in 24- hour format) by when the report must be delivered.

6. Click **Subscribe**.
   The report is delivered as scheduled.
   Note: Only users with the **Administrator** role can unsubscribe to reports.

4.2.3. Unsubscribing to Reports

Prerequisites

You are assigned the Administrator role.

Overview

You can stop the delivery of a subscribed report by unsubscribing to that report. Only a user with the Administrator role can delete report subscriptions.

Steps

1. In the module menu, click Administration.
   The **ADMINISTRATION** page is displayed.

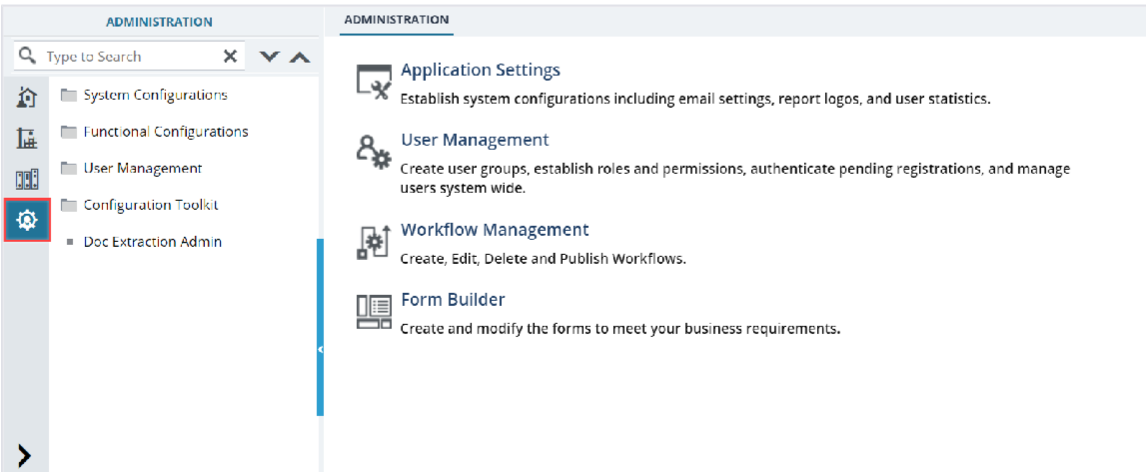


Figure 126: Administration Page

2. In the navigation pane, expand Functional Configurations, expand Report Management, and then click Report Subscriptions.

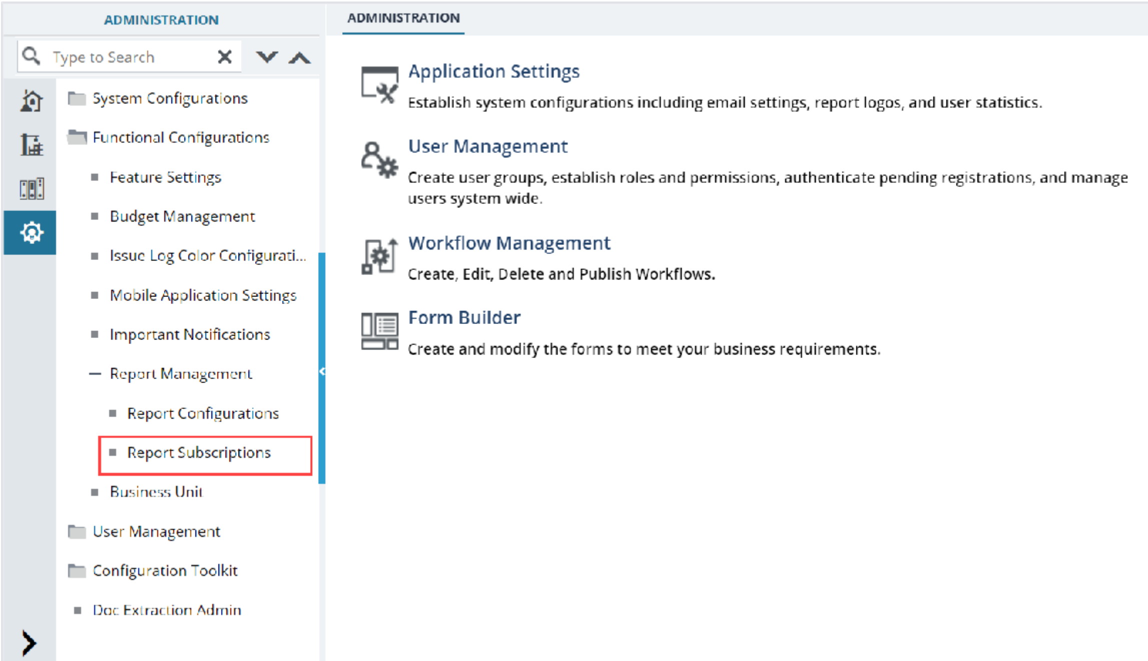
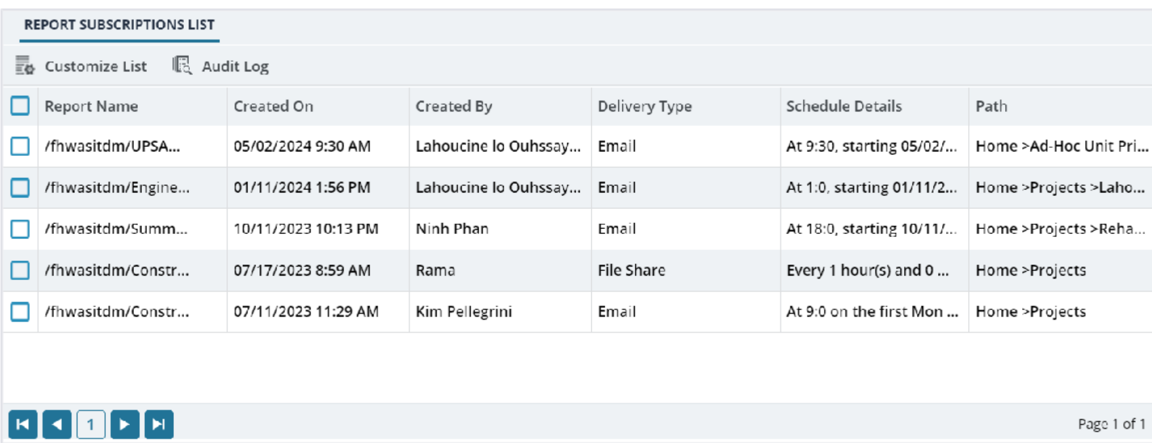


Figure 127: Navigation to Report Subscriptions

The **REPORT SUBSCRIPTIONS LIST** page is displayed.


REPORT SUBSCRIPTIONS LIST

Customize List Audit Log

Report Name	Created On	Created By	Delivery Type	Schedule Details	Path
/fhwasitdm/UPSA...	05/02/2024 9:30 AM	Lahoucine lo Ouhssay...	Email	At 9:30, starting 05/02/...	Home >Ad-Hoc Unit Pri...
/fhwasitdm/Engine...	01/11/2024 1:56 PM	Lahoucine lo Ouhssay...	Email	At 1:0, starting 01/11/2...	Home >Projects >Laho...
/fhwasitdm/Summ...	10/11/2023 10:13 PM	Ninh Phan	Email	At 18:0, starting 10/11/...	Home >Projects >Reha...
/fhwasitdm/Constr...	07/17/2023 8:59 AM	Rama	File Share	Every 1 hour(s) and 0 ...	Home >Projects
/fhwasitdm/Constr...	07/11/2023 11:29 AM	Kim Pellegrini	Email	At 9:0 on the first Mon ...	Home >Projects

Page 1 of 1

Figure 128: Report Subscriptions List Page

3. Select a report subscription, and then click **Delete**.
   A confirmation message is displayed.

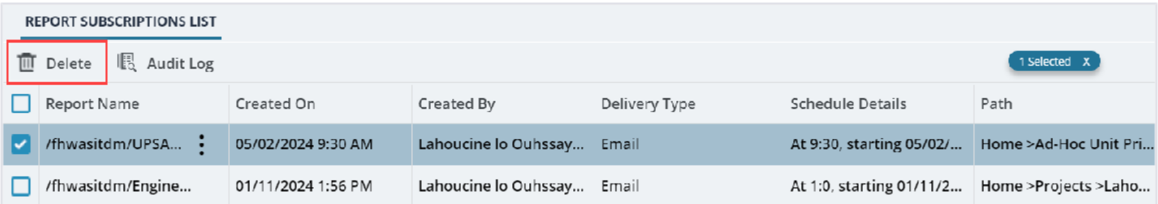


Figure 129: Delete Option

4. Click **OK**.

The selected report subscription is deleted, and delivery of the report is stopped for the user who was subscribed to the report.

4.3. Workflow Status Transitions

A workflow automates a business process for stakeholders to evaluate a form, make decisions, and then take an appropriate action. Workflows comprise various status, and each status is transitioned to the next workflow status through actions taken by stakeholders of the current workflow status. Transitioning a workflow status to the subsequent workflow status is performed in the way of a workflow action.
The following topics describe the various workflow related tasks:

- 4.2.1. Performing Workflow Status Transitions
- 4.2.2. Viewing the Workflow History
- 4.2.3. Selecting Workflow Users
- 4.2.4. Associating a Workflow

4.3.1. Performing a Workflow Action

Prerequisites

- A workflow is associated with the record.
- You are an action stakeholder for a particular status in the workflow.
- You are invited to the project.
- You have editing permission for the form or document.
- A workflow action is pending for you.

Overview

When a workflow action is performed on a record, the record is moved from the current workflow status to the subsequent workflow status. A workflow status is transitioned to the subsequent workflow status based on the workflow action conditions defined.

Steps

1. Open a form list page or document list page.
   Note: You can view the workflow status of a record in the Workflow Status column of the list page.
2. Perform any of the following steps, as applicable:
   - Select the appropriate record.

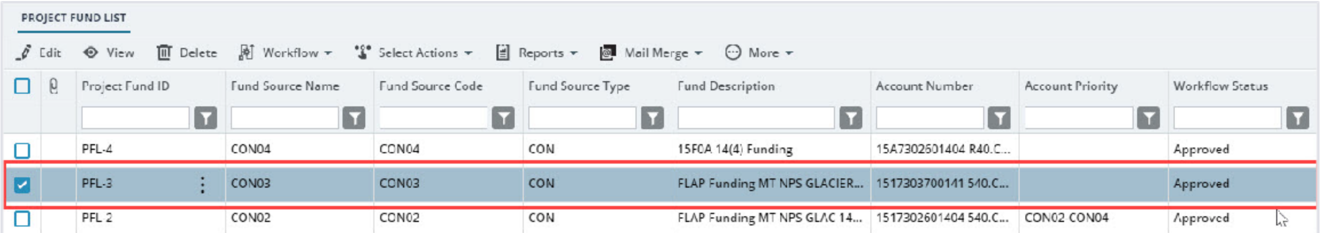


Figure 130:Selecting a Record

   - Select multiple records that are in the same workflow status and have the same workflow associated with them.

Figure 131: Multiple Records with Same Status

- Select the appropriate record, and then click **Edit**.
  The **Project Fund List** page is displayed.

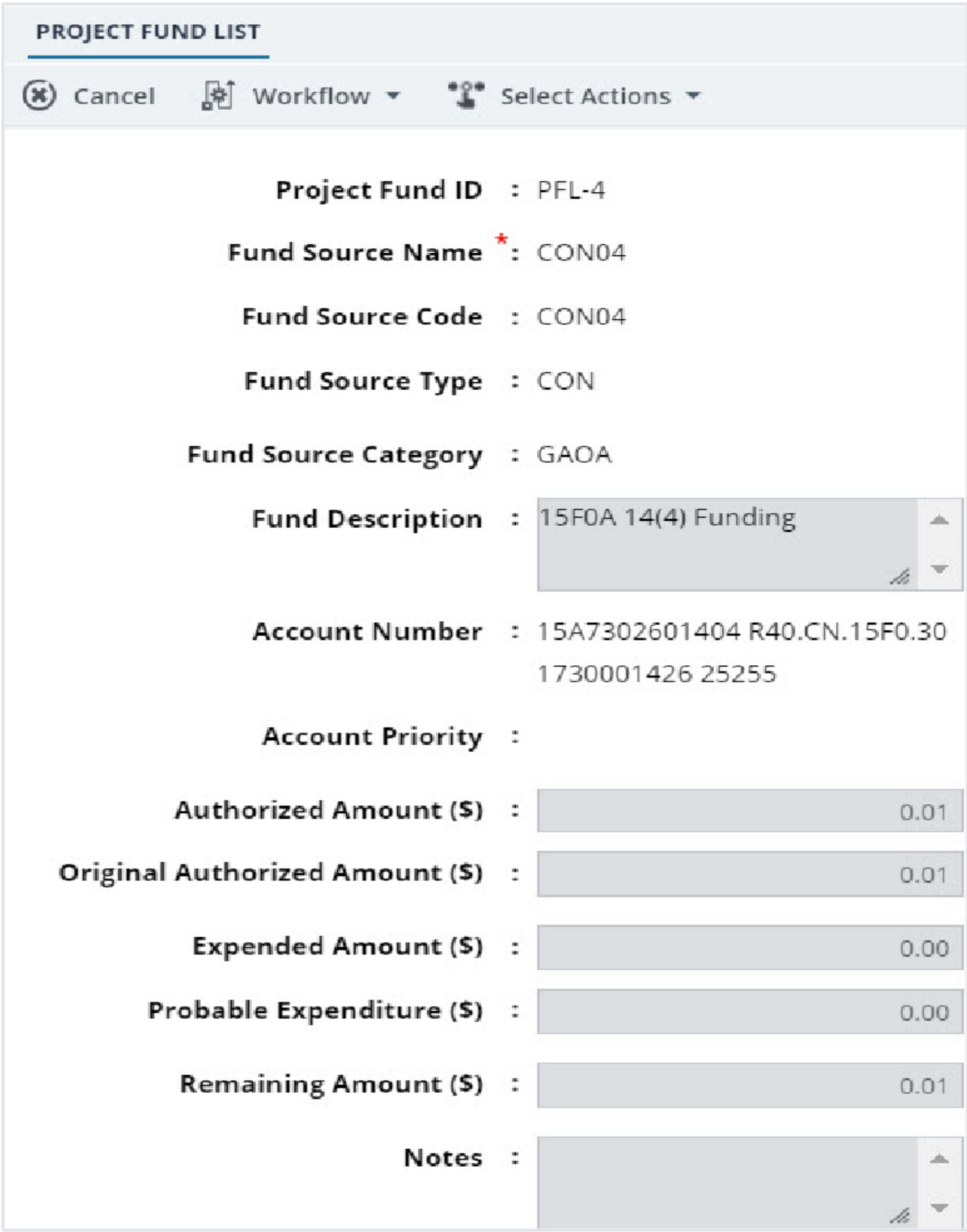


Figure 132: Editing a Record

3. Click **Select Actions**  , and then click the appropriate workflow action.

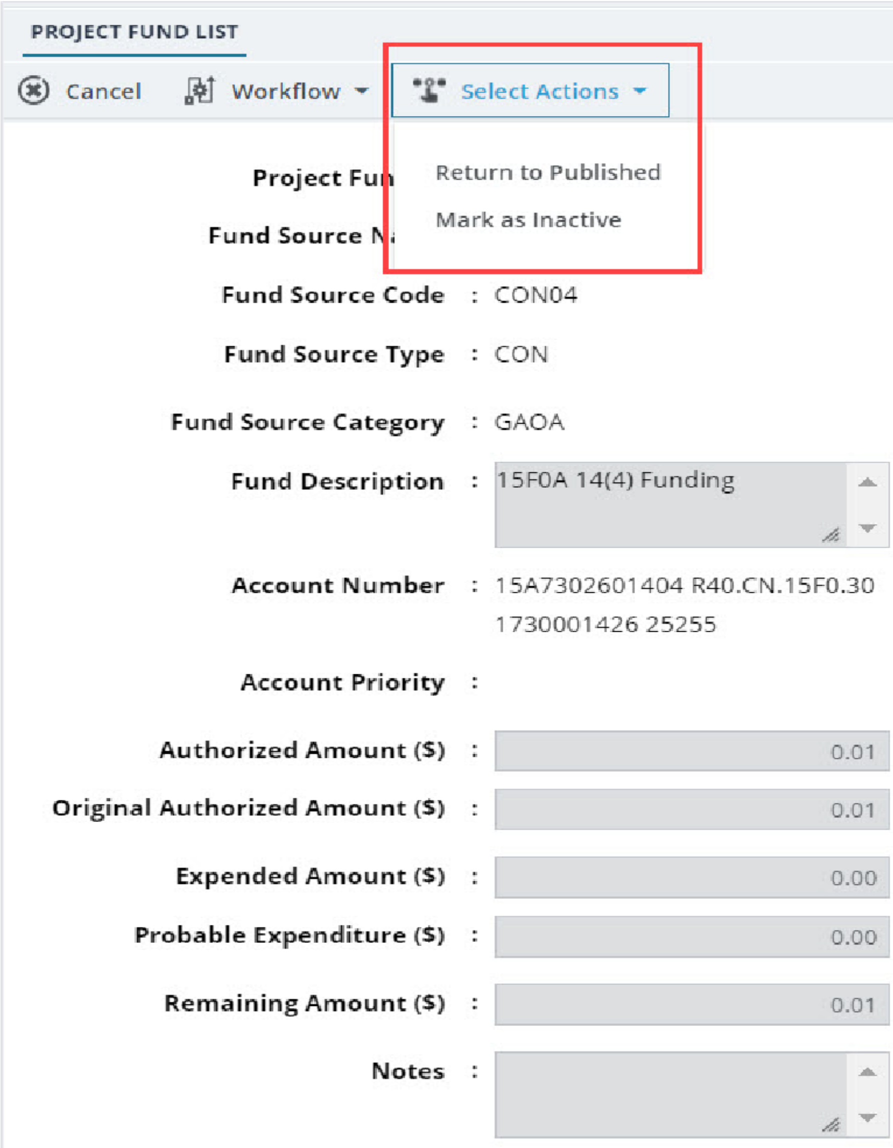


Figure 133: Using Select Actions Option – Details Page

Available actions are based on the definition of the associated workflow.

The **Masterworks** dialog box is displayed.

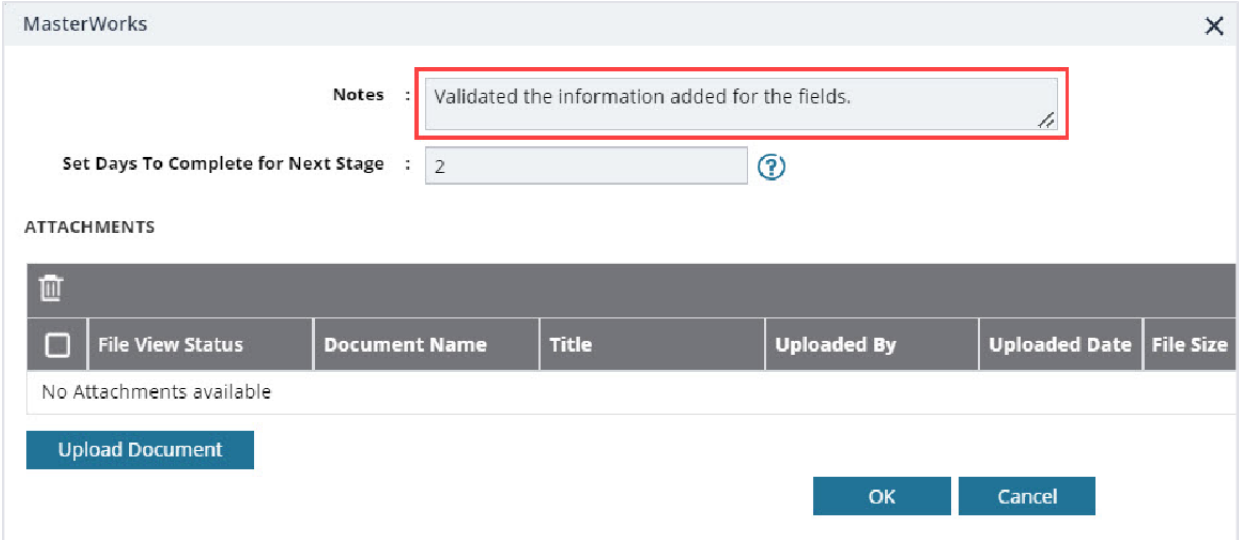


Figure 134:Masterworks Dialog Box

5. Optionally, in the **Notes** field, enter the notes for the workflow transition.
   You can access these notes from the **Workflow History** dialog box.
6. In the **Set Days To Complete for Next Stage** field, enter the number of days by when the workflow action of the next workflow status must be completed.

   Note:
   - The number mentioned in this field determines the due date to complete the workflow action for the next workflow status.
   - If the field is empty, the application applies the default number of days set for the respective workflow.
   - If you want to override the default days set for the respective workflow, you need to enter the appropriate number in this field.

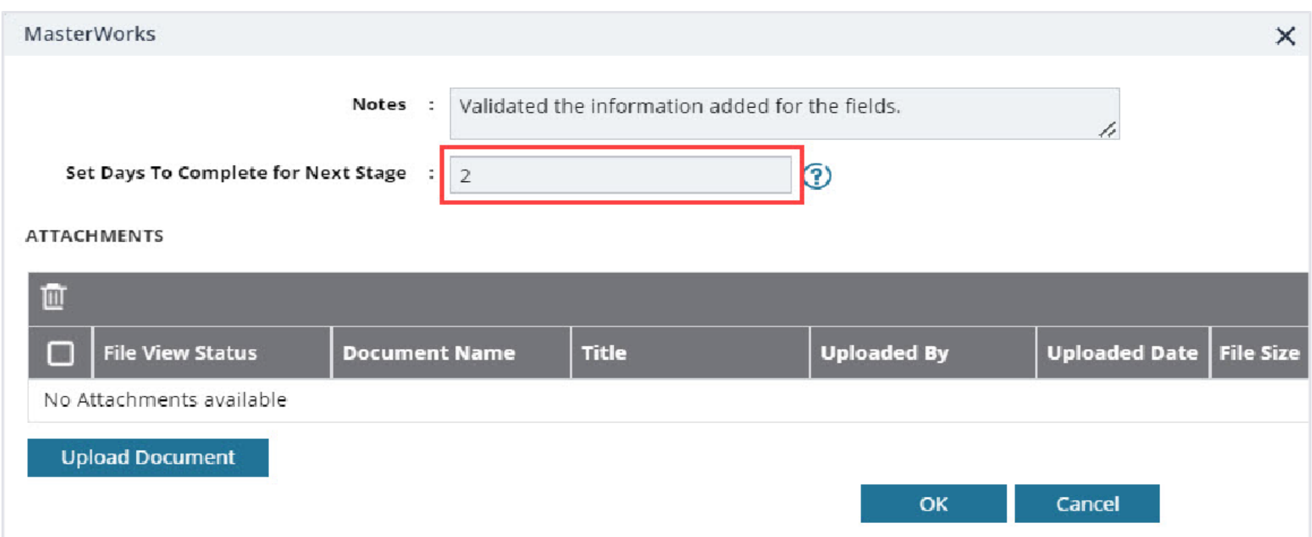


Figure 135:Set Days To Complete for Next Stage

Optionally, in the **ATTACHMENTS** section, you can upload or link related files.
For information on attachments, refer to Section 4.1. Attachments.
You can access these documents from the Workflow History dialog box. For more information, refer to Section 4.3.2. Viewing the Workflow History.

7. Click **OK**.

Note:

- You cannot revert certain workflow status to the previous workflow status.
- You cannot edit or select certain fields in a form based on the current workflow status of the record.

4.3.2. Viewing the Workflow History

Prerequisites
A workflow is associated with the record.

Overview
You can view the business process progression of a record in the workflow history of the record. The following details are available in the workflow history of every record:

- Action taken at every workflow status
- Date the workflow action was performed
- Notes entered when the workflow action was performed
- User name and user ID of the users who performed a workflow action
- Documents attached during workflow transitions

The **Project Fund List** form is used for illustration purposes.

Steps

1. In the list page of a form, select the appropriate record.

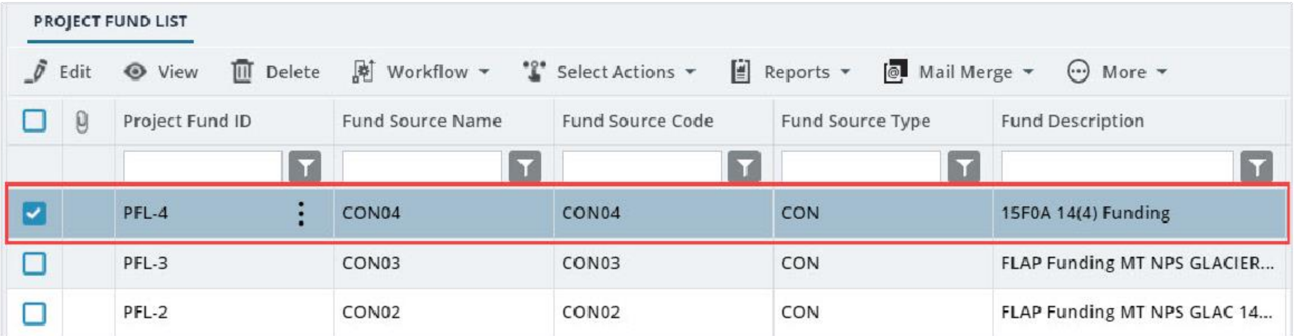


Figure 136: Selecting a Record

2. Click **Workflow**, and then click **History**.

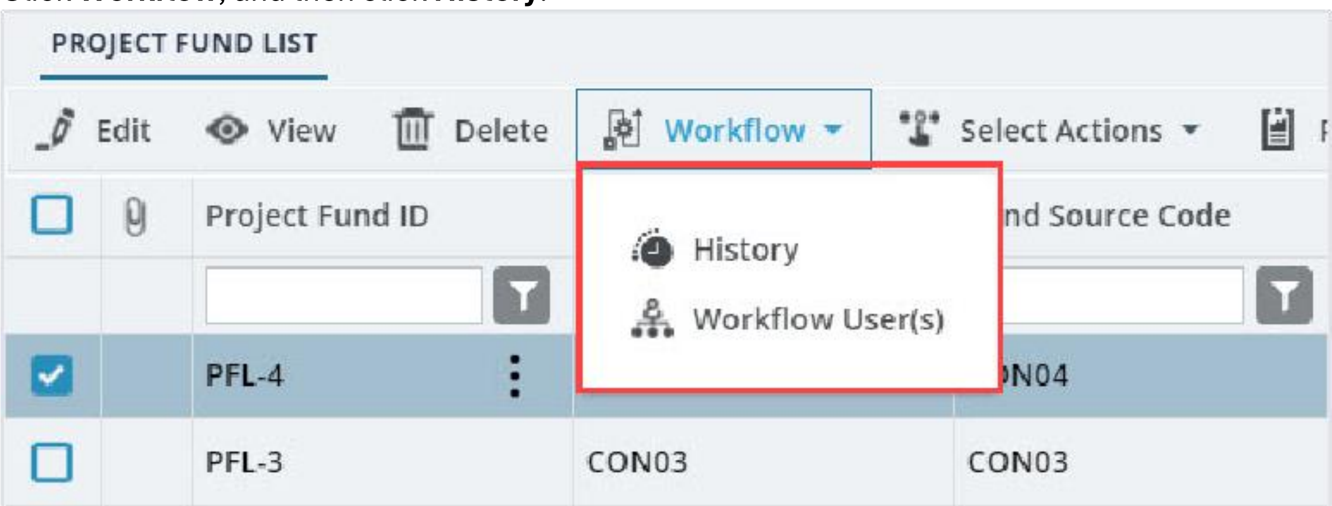


Figure 137: Using History Option

The **Workflow Status & History** dialog box is displayed.

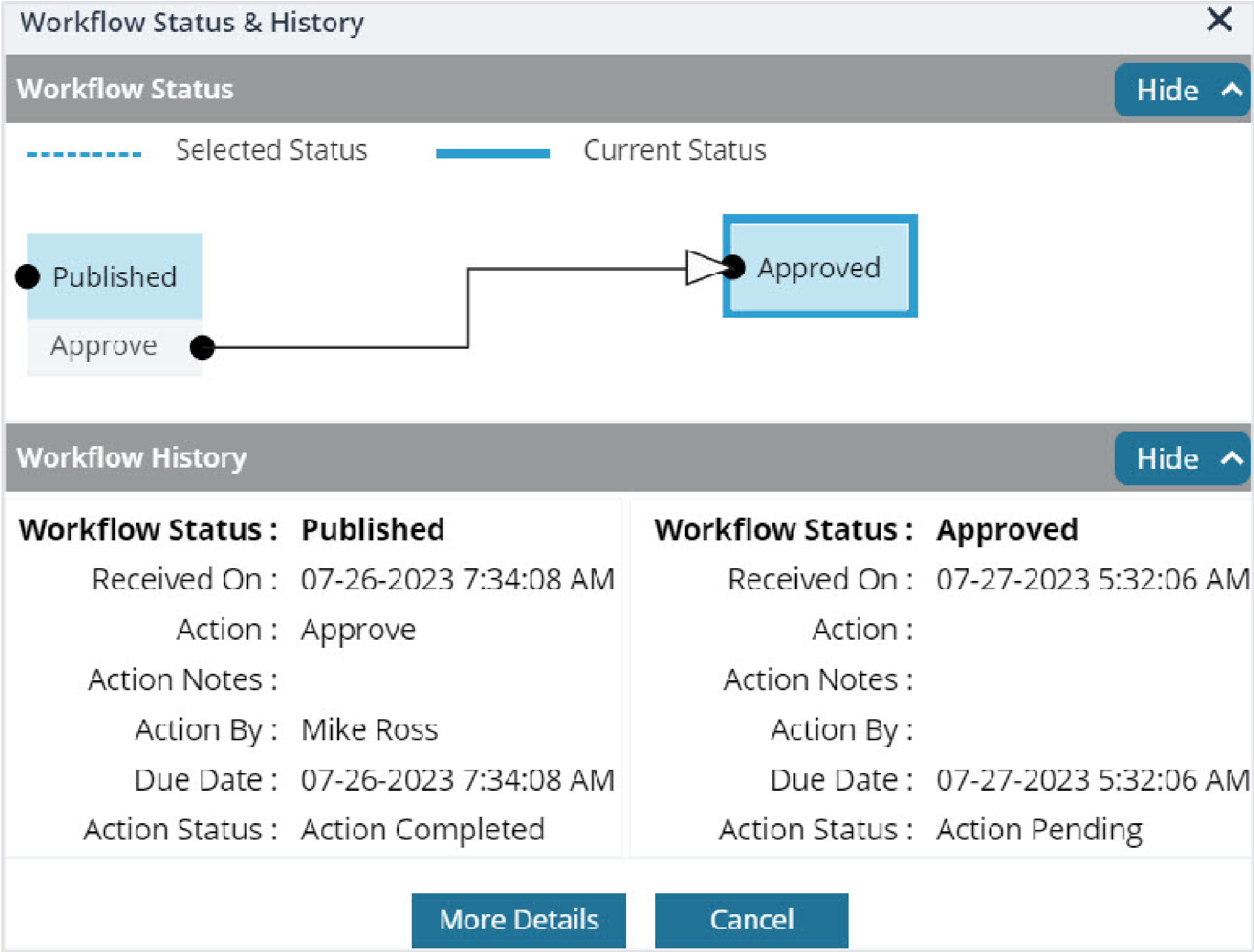


Figure 138: Workflow Status & History Dialog Box

The **Workflow Status** section displays the current and the previous workflow statuses.
The **Workflow History** section displays the details of the workflow statuses.

3. To view the complete workflow history, click **More Details**.

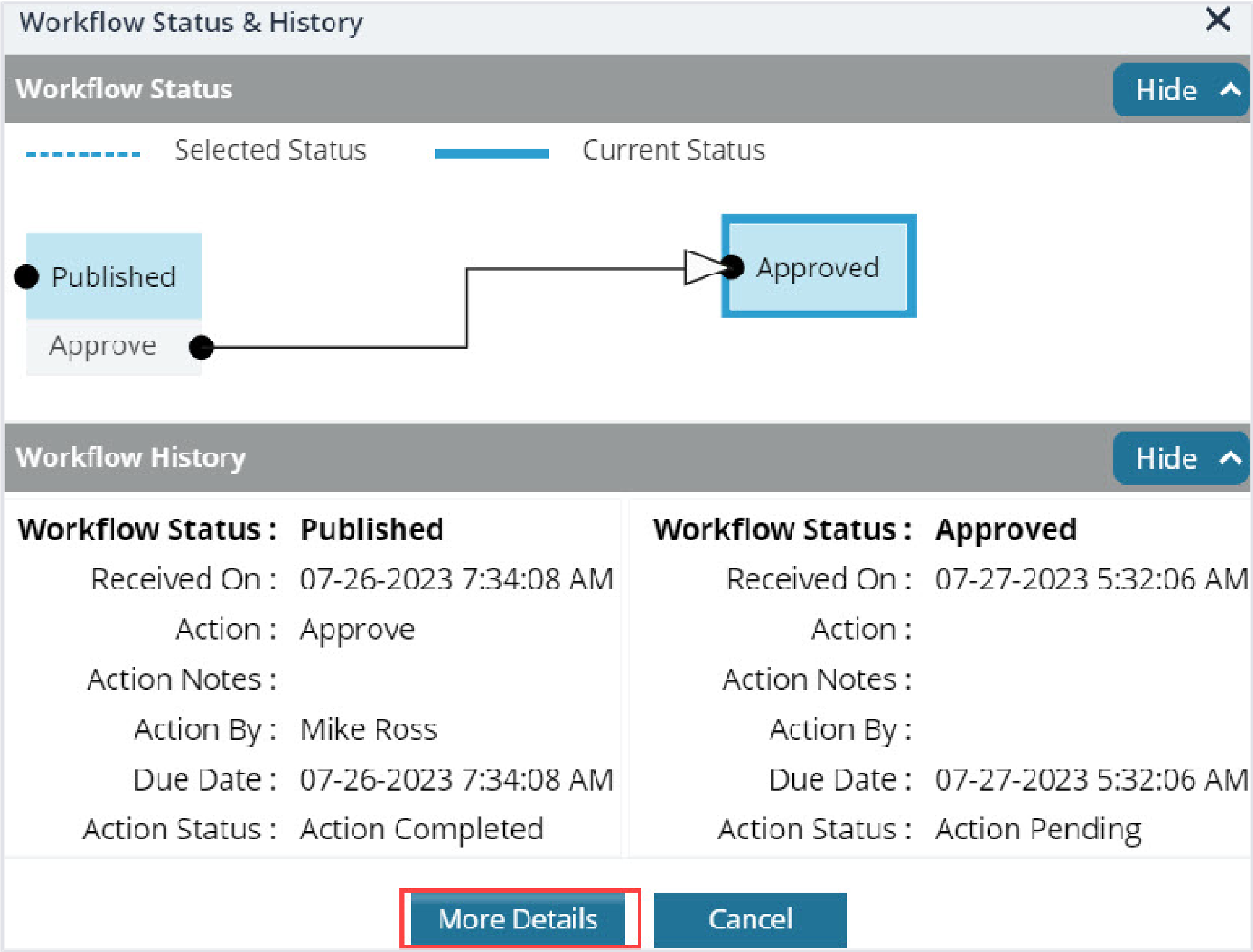


Figure 139: More Details option

The **History** page is displayed.

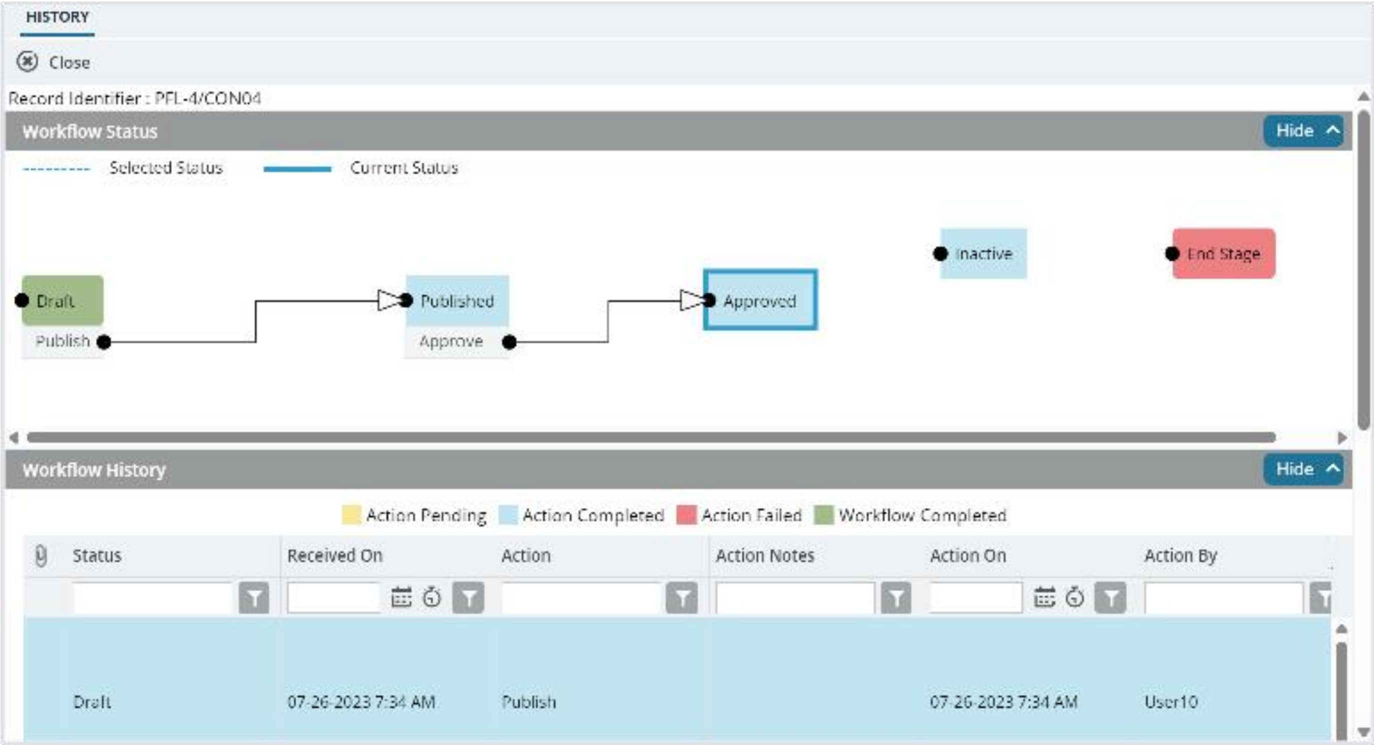


Figure 140: History Page

The **Workflow Status** section displays the progression of the workflow through the various statuses. The **Workflow History** section displays the details associated with each of the workflow statuses. The **ATTACHMENTS** section displays the list of documents attached when users performed workflow actions on the selected record.

4. To view details associated with any of these workflow statuses, click the appropriate workflow transition record in the **Workflow Status** section.

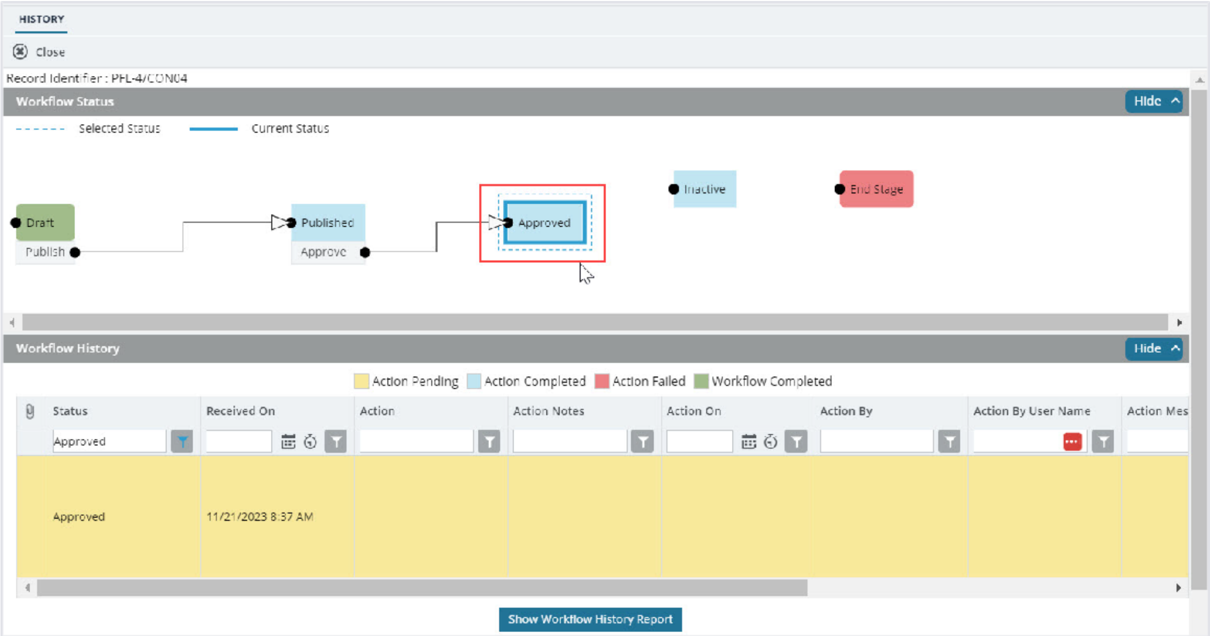


Figure 141: Workflow Status Section

The **Workflow History** section displays the details associated with the selected workflow statuses. The **ATTACHMENTS** section displays the files uploaded during the workflow transition of the selected workflow statuses.

5. To open an attachment, in the **ATTACHMENTS** section, in the **Document Name** column, click the required file name.

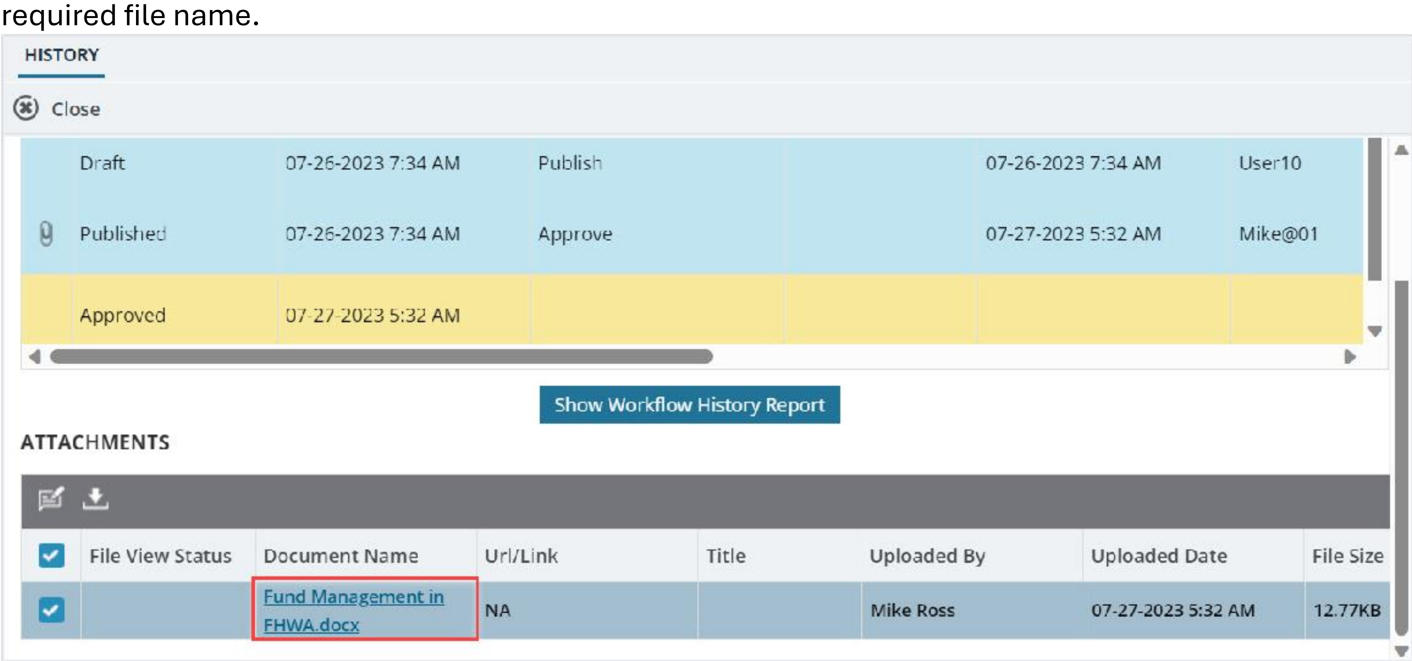


Figure 142: Clicking Document Name

The document is opened in the application viewer.

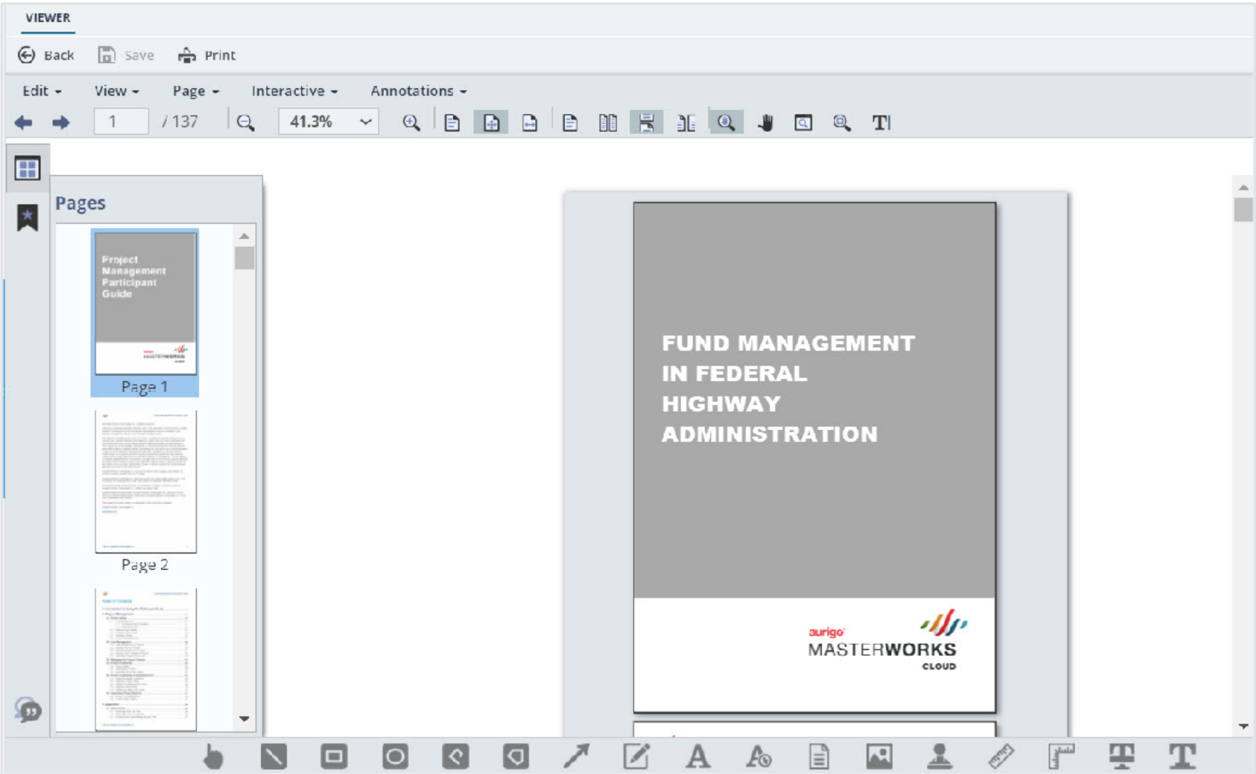


Figure 143: Viewing a Document in the Application Viewer

6. To view the workflow history as a report, click **Show Workflow History Report**.

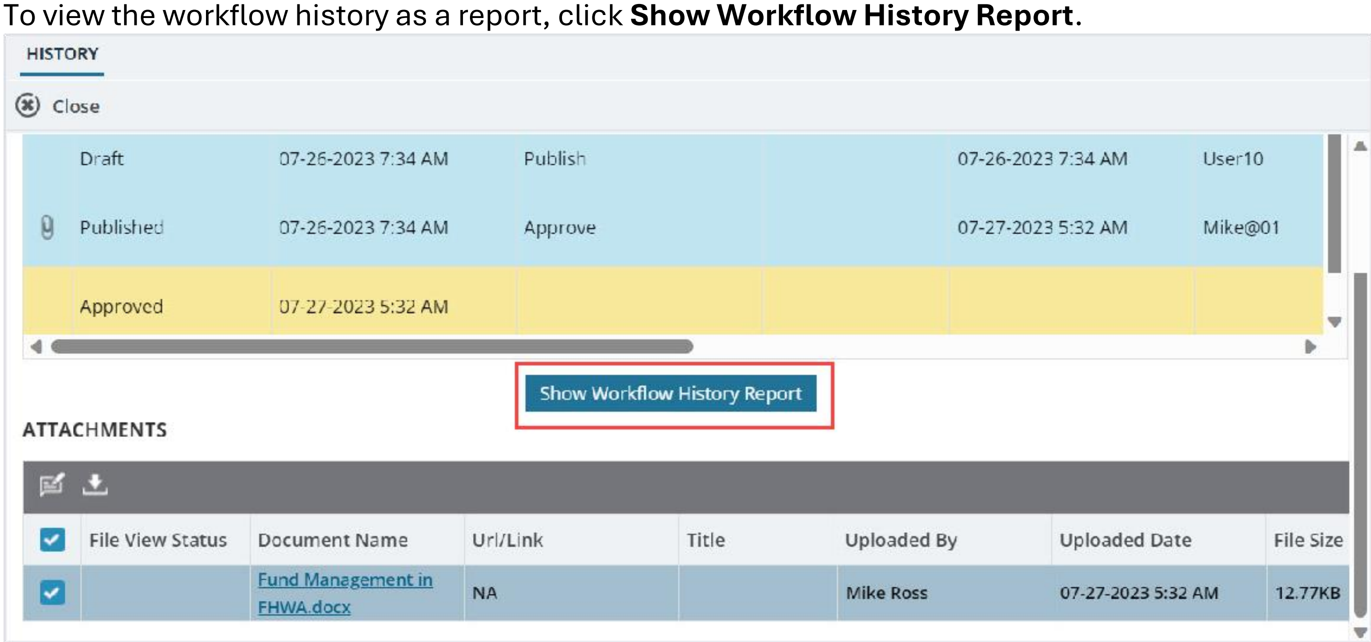
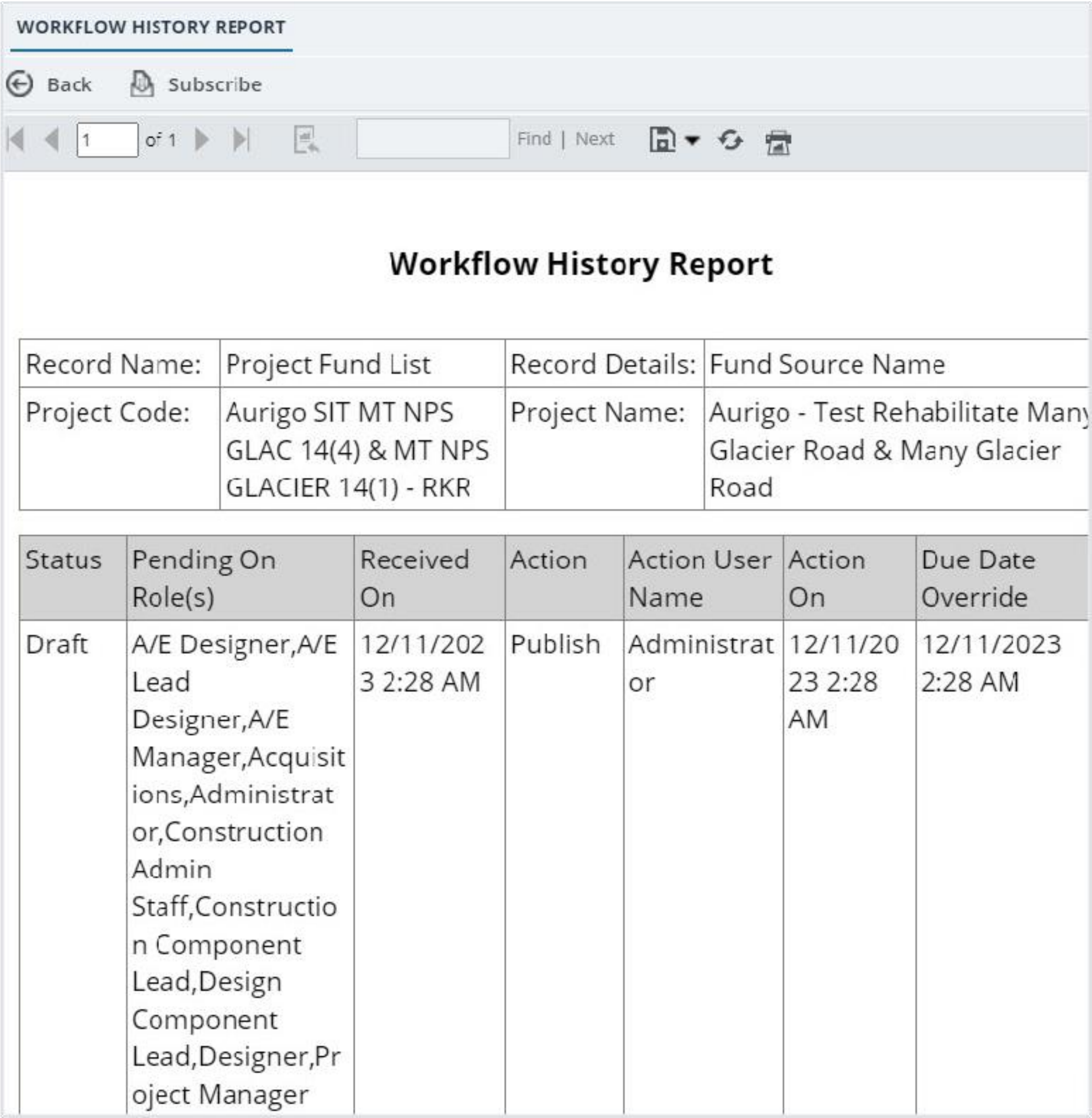


Figure 144: Using Show Workflow History Report Option

The **Workflow History Report** is displayed.



Workflow History Report

Record Name:	Project Fund List	Record Details:	Fund Source Name
Project Code:	Aurigo SIT MT NPS GLAC 14(4) & MT NPS GLACIER 14(1) - RKR	Project Name:	Aurigo - Test Rehabilitate Many Glacier Road & Many Glacier Road

Status	Pending On Role(s)	Received On	Action	Action User Name	Action On	Due Date Override
Draft	A/E Designer,A/E Lead Designer,A/E Manager,Acquisitions,Administrator,Construction Admin Staff,Construction Component Lead,Design Component Lead,Designer,Project Manager	12/11/2023 2:28 AM	Publish	Administrator	12/11/2023 2:28 AM	12/11/2023 2:28 AM

Figure 145: Workflow History Report Page

4.3.3. Selecting Workflow Users

Prerequisites
Workflows are published for the form.

Overview
At any workflow stage, you can select specific users to mandatorily take an action at the defined workflow stage. These selected users must perform an action at the defined workflow stage to move the workflow to the subsequent workflow stage. Only selected workflow users can perform the workflow action.

For document folders in the Document Management module, users selected at a folder level are applicable to all sub-folders and document records within them. Additionally, you can select users at a sub-folder level and at a document record level.
The **Project Fund List** form is used for illustration purposes.

Steps

1. To select users in the workflow of a module or document folder, perform the following steps:
   a. In the list page of a form or the list page of a document folder, click **Workflow**, and then click **Workflow User(s)**.

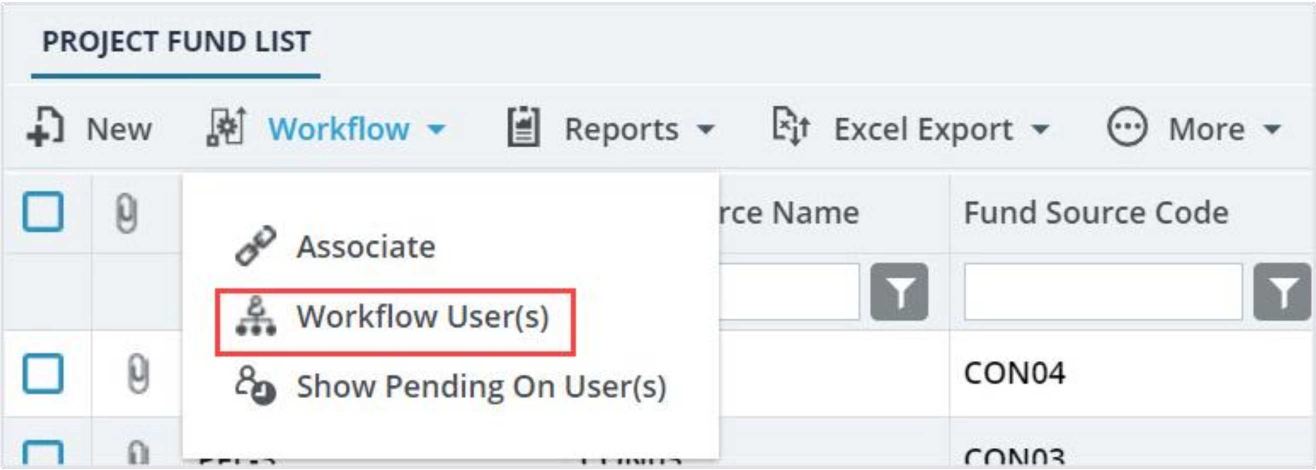


Figure 146: Using Workflow User(s) Option

   b. From the **Available Workflows** drop-down list, select a workflow.
   The published workflows associated with the form are displayed.

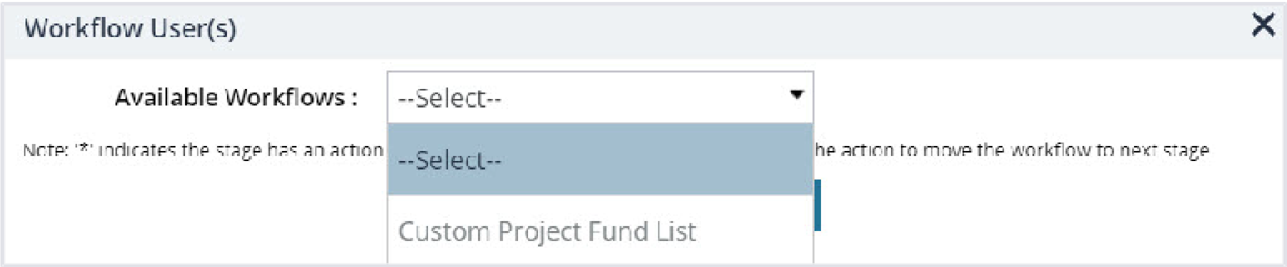


Figure 147: Published Workflows

The **Workflow User(s)** table is displayed.
The list of stakeholders for each stage and role is displayed.

2. Alternatively, to select users in a workflow for a record of a form or a document, perform the following steps:
    - Select a record, click **Workflow**, and then click **Workflow User(s)**.

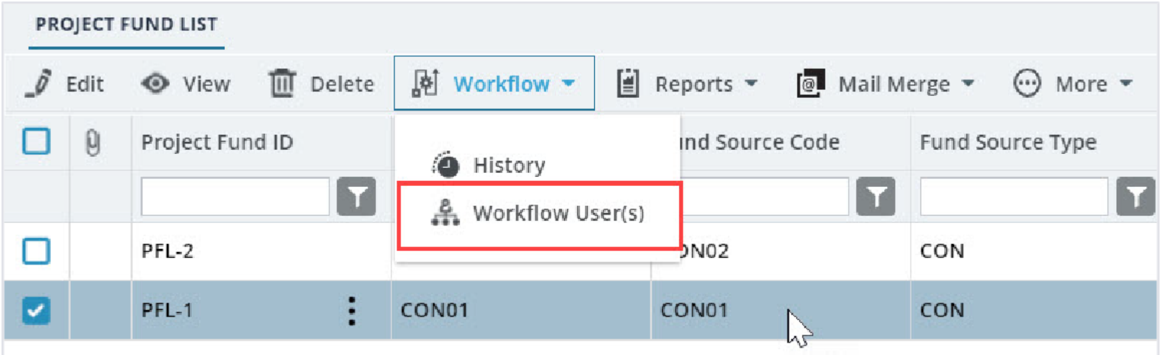


Figure 148: Using Workflow User(s) Option

The **WORKFLOW USER(S)** page with the associated workflow of the record is displayed.

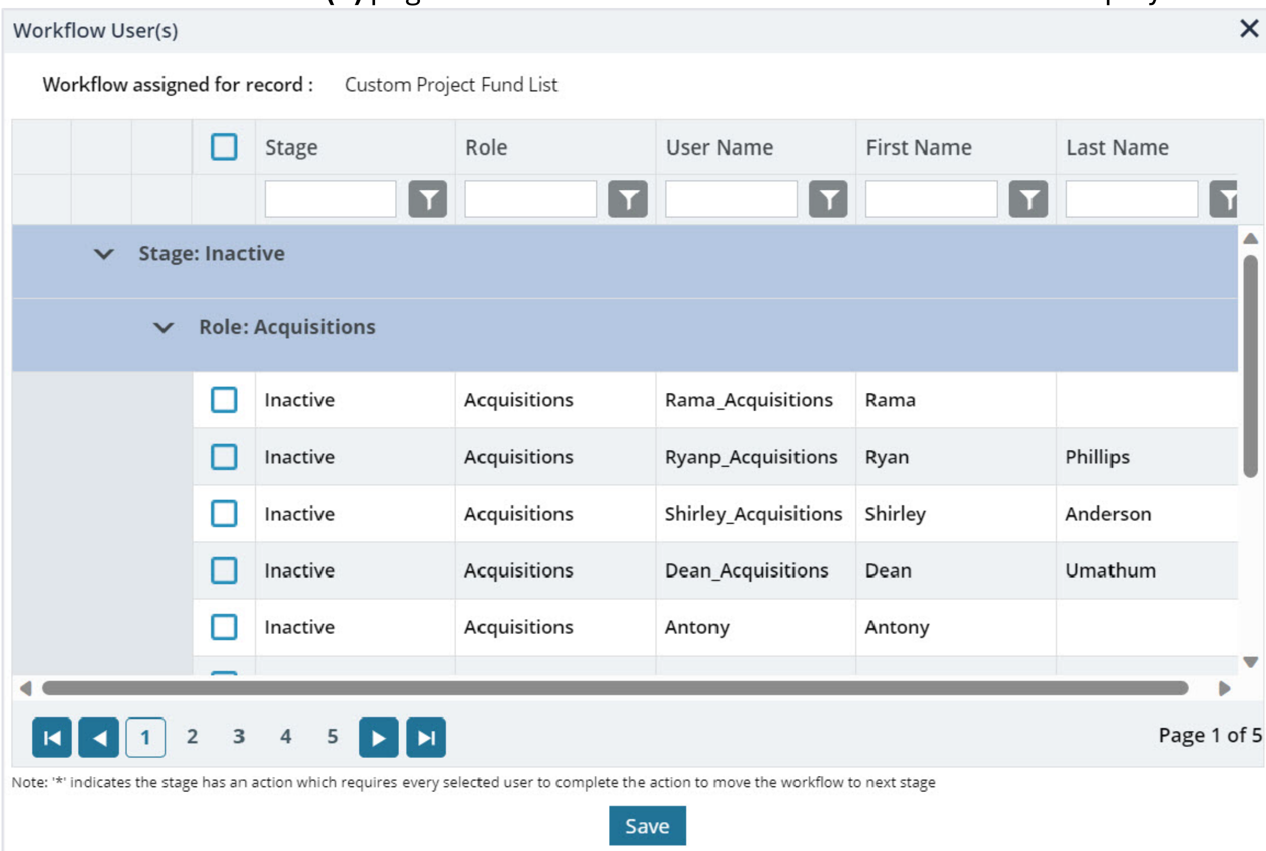


Figure 149: Workflow User(s) Page

Only workflow stages following the current workflow stage are displayed, and the list of stakeholders for each stage is displayed.

3. Select the users for each stage to add to the workflow.

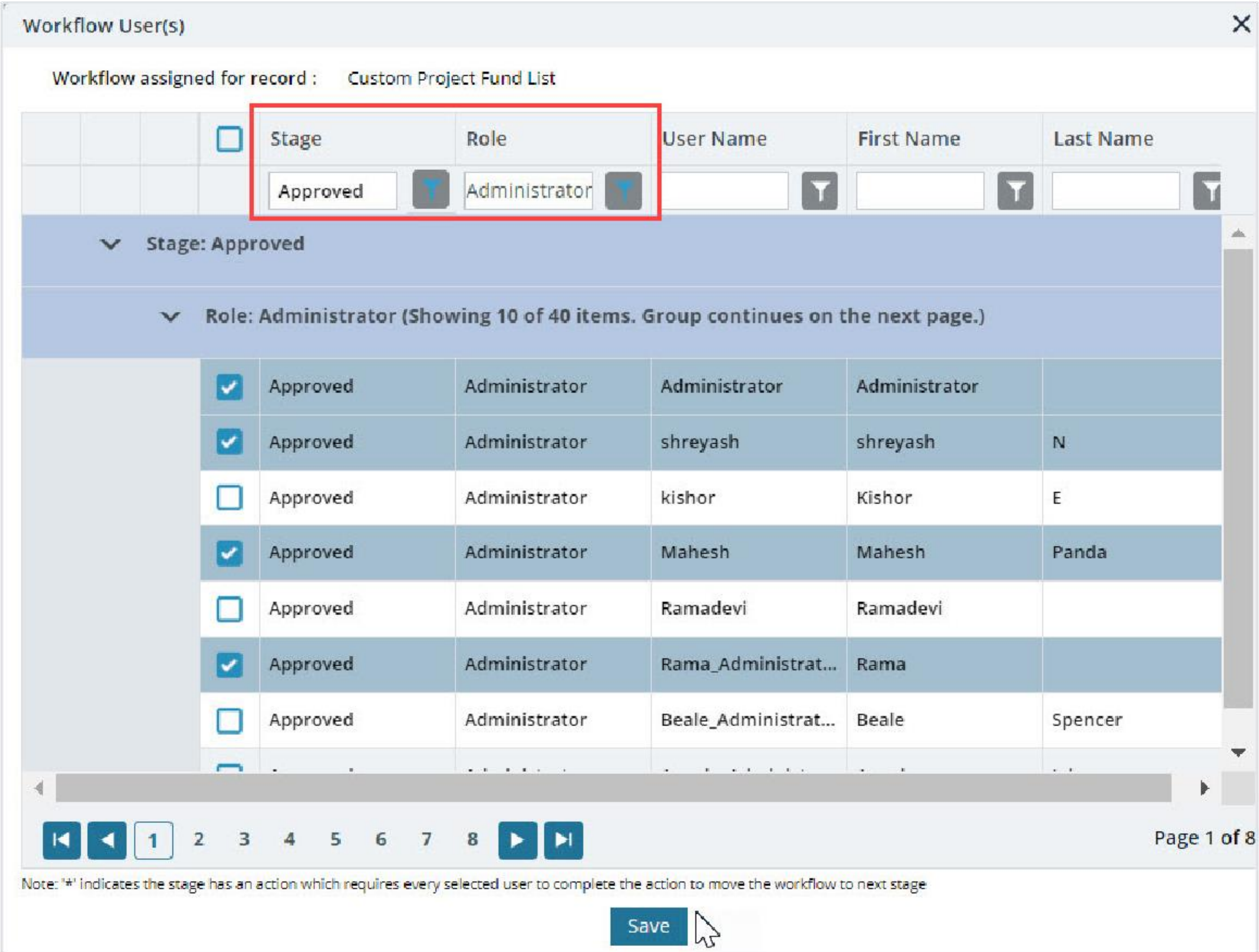


Figure 150: Using Filter Option

Optionally, you can filter the users using the following filters:

- Stage
- Role
- User Name
- First Name
- Last Name

4. Click **Save**.
   Based on the defined workflow, any or all selected users must perform the workflow action on the selected record.
   The **WORKFLOW HISTORY** page displays the workflow actions performed by all users across all stages of the workflow.

4.3.4. Associating a Workflow

Prerequisites

- Workflows are published for the form.
- The logged-in user is assigned Administrator role.

Overview

Once a workflow is published as the default workflow for a form, every record of the form that is created in every project is associated with its default workflow. You can change the default workflow of a form. The newly associated workflow is effective for this form only in this project. New records created for this form in this project are associated with the newly selected workflow.
The **Project Fund List** form is used for illustration purposes.

Steps

1. In the navigation pane, click a form to open.

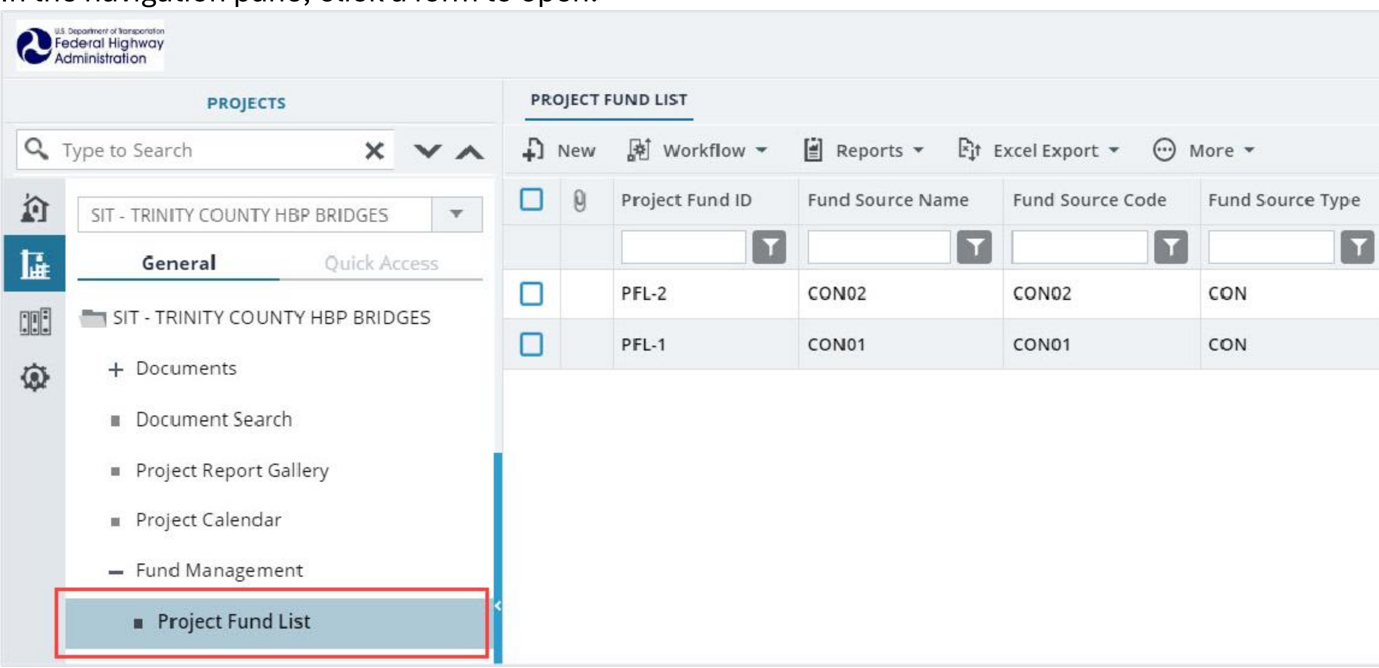


Figure 151: Selecting a Form

2. Click **Workflow**, and then click **Associate**.

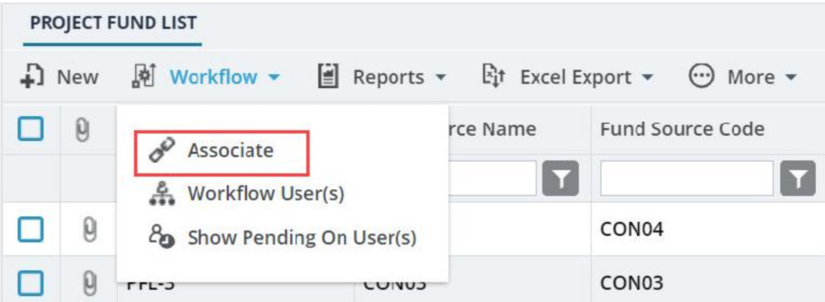


Figure 152: Using Associate Option

The **Workflow Association** dialog box is displayed.

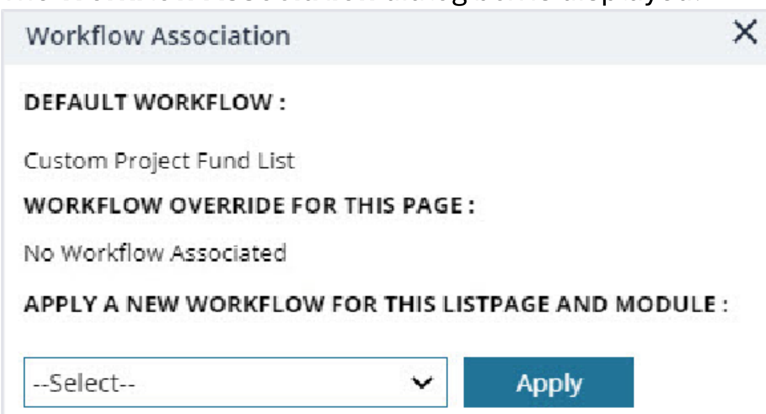


Figure 153: Workflow Association Dialog Box

The **DEFAULT WORKFLOW** section displays the workflow name of the form that is marked as default for the form in the application.

3. To associate a different workflow to the form in the project, from the **APPLY A NEW WORKFLOW FOR THIS LISTPAGE AND MODULE** drop-down box, select the workflow to associate with the form for the project.

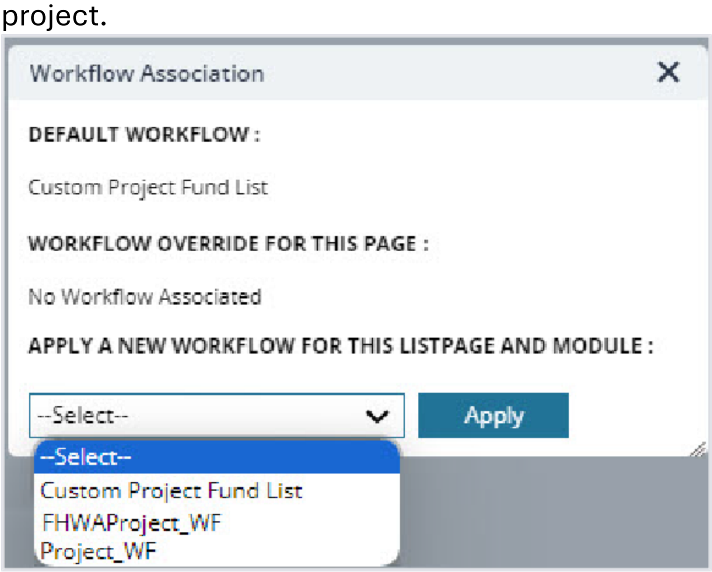


Figure 154: Using Applying a new Workflow for this List Page and Module Option

Available options are the published workflows for the respective form.

Upon selecting the workflow, the **WORKFLOW OVERRIDE FOR THIS PAGE** field displays the current workflow that is associated with the form for the project.

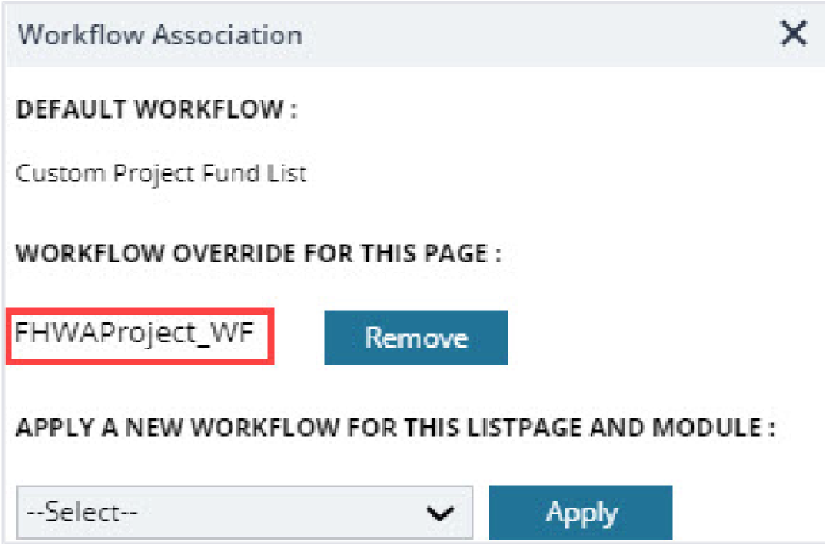


Figure 155: Updated Workflow Override for this Page Field

If no selection is done in the **APPLY A NEW WORKFLOW FOR THIS LISTPAGE AND MODULE** field, then the **WORKFLOW OVERRIDE FOR THIS PAGE** field displays **No Workflow Associated**.

4. Optionally, to reset the workflow of the form for the project to the default workflow as defined for the form in the application, click Remove adjacent to the **WORKFLOW OVERRIDE FOR THIS PAGE** field.

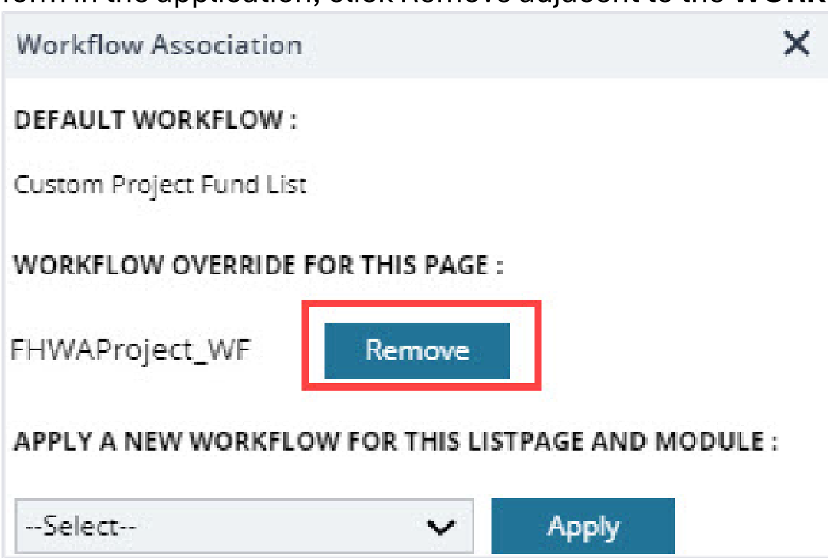


Figure 156: Resetting to Default Workflow

5. Click **Apply** to save the changes.
   The workflow properties are associated with the form.
   The selected workflow is associated with the newly created records of this form within the project.