Federal Highway Administration Acquisition and e-Bidding Participant Guide

# U.S. Department of Transportation Federal Highway Administration

# Acquisitions and e-Bidding Participant Guide



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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. <u>3.1. Advertisement</u>
  - a. 3.1.1. Create advertisements
  - b. <u>3.1.2. Publish advertisements</u>
  - c. <u>3.1.3. Cancel advertisements</u>
- 2. <u>3.2. Amendment</u>

3.

- a. 3.2.1. Create amendments
- b. 3.2.2. Publish amendments
- 3.4. Bid Opening and Review
  - a. 3.4.1. Review bids
  - b. <u>3.4.2. Import bids</u>
  - c. 3.4.3. Award bids

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

- <u>3.3.3. Submit bid responses</u>
- <u>3.3.4. Modify submitted bid responses</u>
- <u>3.3.5. Withdraw bids</u>

• <u>3.3.6. Acknowledge amendments</u>

## **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	-	-	Yes	-	-
Lead					
Designer	-	_	Yes	-	-
Lead Designer	-	_	Yes	-	-
Design QA/QC	-	-	-	-	-
Highway Design	-	-	Yes	-	-
Manager					
Project Manager	-	-	Yes	-	-
A/E Designer	-	_	Yes	-	-
A/E Lead Designer	-	_	Yes	-	-
A/E Manager	-	-	Yes	-	-
Acquisitions	Yes	Yes	Yes	Yes	Yes
Construction	-	-	Yes	-	-
Component Lead					
Construction Admin	-	-	Yes	-	-
Staff					
Construction	-	-	Yes	-	-
Engineer					
Highway	-	-	Yes	-	-
Construction					
Manager/QA QC					
Construction	-	-	Yes	-	-
<b>Operations Engineer</b>					
Inspector	-	_	Yes	-	-
Assistant Project	-	-	Yes	-	-
Engineer					
Project Engineer	-	-	Yes	-	-
Regional Engineer	-	-	Yes	-	-

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### Table 2: Table 2 – Amendment

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

- <u>3.1.1. Create advertisements</u>
- <u>3.1.2. Publish advertisements</u>
- <u>3.1.3. Cancel published advertisements</u>

## 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:
  - o 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.

	PROJECTS	PR	OJECTS	
Q, I	ype to Search 🗙 🗙 🔨	Ð	New 👰 Workflow 🗸 📋 Reports 🛪 👸	Manage Users 🛛 🛱 Mark Offline/Online 💮 More 👻
俞	Select Project	0	Project Code	Project Name Project Description Business Unit
朣	Recent Projects		T	
981			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
989	511 - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
<u>نې</u>	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

Figure 1: Navigation to Projects Module

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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.

	PROJECTS	ADVERTISEMENT						
ব হ	Type to Search X X	New	Associate	Select Actions -	Merge and Attach     Merge and Download     Merge and Email	Reports	-None *7 Clear	
17		GENERAL	WORKELOW		MAIL MERGE	DIHERS	FILTERS	
Liff	General Quick Access	D Solicitati	ion Number Project Code	Project Name	Solicitation Procedure	Privacy	rivacy Notice A	B Bidding
	T SIT - CA ERFO FS LSPDR 2023-1(							
<u>ن</u>	+ Documents	No records to display						
	<ul> <li>Document Search</li> </ul>	no records to display.						
	<ul> <li>Project Report Gallery</li> </ul>							
	<ul> <li>Project Calendar</li> </ul>							
	+ Fund Management							
	<ul> <li>Bid Estimate Information</li> </ul>							
	- (SIT - CA ERFO FS LSPDR 2							
	Engineer's Estimate							
	- Bidding							
	= Advertisement							
	= Amendment							
	<ul> <li>Bid Opening And Review</li> </ul>							
	<ul> <li>Contracts</li> </ul>							
		4	_					Þ
>								Page 1 of 1

Figure 3: List Page of the Advertisement Form

4. Click New.

The **ADVERTISEMENT** page is displayed.

e & Exit [ 👸 Save & Continue	(🕄 Cancel 🙀 Workflow	i → 📲 Select Actions →	
VERTISEMENT DETAILS BID ITEM	5		
Solicitation Number *	0982AF23R000015	EE Number	: <u>FF-001</u>
Project Code	SIT - CA ERFO FS LSPDR 2023	R-1(1) Project Name	: SIT - Black Mountain Road
Solicitation Procedure	Negotiated/RFP	✓ Competition Information	: Sole Source, 8a 🗸 🗸
Allow Paper Bids		Privacy	<ul> <li>Data is public</li> <li>Data cannot be released</li> </ul>
A+B Bidding		Privacy Notice	Source Selection information – Se
Bid Opening Date and Time <sup>4</sup>	06/26/2024 12:00 PM	bid Opening Officer	*: Ryan Phillips
Time Zone *	: MT	~	
Bid Opening Location *	Lakewood, CO		
Bid Schedule Text	Uldder/Offeror please note: figures, for each pay item for which a quard show the amount bid. Should any n corrected unit price extension shall govern. When sum pay item, When a sum based on a inserted amount bid for the item in th amount bid for the item in the amount bid for the item.	Uefore preparing the bid, carefully read the Solicitation Prov antity appears in the bid schedule. Multiply the unit price by mathematical check made by the Government show a mistak in the word ""LPSM"" (Lump Sum) appears as a unit bid price, a fixed rate appears for any pay item in the amount bid colur e total bid amount. Total all of the amounts bid for each pay	isions. Insert a unit bid price, in a the quantity for each pay item en in the amount bid, the insert an amount for each lump mn, include the Government ritem and show the total bid

#### 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
	<u>3.4.2. Importing a Bid.</u>
Composition Information	From the dram down list coloct the environmiste commentition
Competition mormation	information
	The available options are Best Value I PTA Best Value Trade
	Off Full & Open Sole Source 82 etc
	The dron-down list displays the competition information defined
	in the Competition Information catalog of the library
Privacy	Select the appropriate option
l lively	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.
	<b>Note:</b> 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>B</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.
	<ul> <li>Click is, and select the date.</li> </ul>
	Note: You must select only future dates.
	<ul> <li>Click <sup>(i)</sup>, and select the time.</li> </ul>
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.

New LISTING OF CONTRACTORS ALLOWED TO SUBMIT THE BID					
Company Name *:	Key Stone Limited				
Email ID :	keystoneltd@amail.com				
Phone Number :	222-222-2222				
Company User *:	Steve				
	<i>li</i>				
	Save Cancel				

Figure 5: Contractors Allowed to Submit the Bid

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

Field Name	Descri	iption				
Company Name	To sele	To select the company name, perform the following steps:				
	:					
	1.					
		The Compa	any Picker	<sup>,</sup> dialog bo	x is displa	aved.
		Company Picker	-	0		×
					_	
		ID	▼ Company Name	T Email ID	Phone Number	▼ Business Type ▼
		2646	45 Signs, LLC			Small Business
		1616	AJCE Corp.			Small Disadvantaged Business
		4657	Allied Aggregate			Small Business
		4662	Arizona Survey			Small Business
		4664	Asphalt Busters			Small Business
		2296	Asphalu LCC_Test			Small Business/Women Owned Sm
		0533	B&C Transport			
		4677	Battle Ridge Builders			Small Business
		4663	C-A Native Inc.			HUBZone Small Business,Small Bus
		0625	Captain Construction			Small Business,Small Disadvantage
		2989	Century Companies Inc.			Large Business
		3035	Columbia River Contractors, In	¢		Small Business
		4649	Contech Engineered Solutions			Large Business 🖉
			40 🔻 items			1 - 40 of 79 Items 🚺
				Select Cancel		
		F	igure 6: Comp	any Picker D	ialog Box	

Field Name	Description			
	Available options are active company names defined in the			
	Contractor Details catalog of the library.			
	ii. Clic	k the appropriate com	pany, and then click	Select.
Email ID	Enter t	he email address of th	ne company.	
Phone Number	Enter t	he contact number of	the company.	
Company User	To sele	ect the users, perform	the following steps:	
	a.	Click	0 1	
	-	The Company User F	<b>Picker</b> dialog box is o	displaved.
		Company User Picker		×
		0 selected of total 4		Select All Records
			User Name	T
			roy	
			Jonny	
			Steve	
			TestBidder1	-
		<ul> <li>✓ 1</li> <li>✓ 40</li> <li>✓ items</li> </ul>		1 - 4 of 4 items
			Select Cancel	
		Figure 7: Con	npany User Picker Dialog E	lox
		Based on the compar	ny selected in the <b>C</b>	ompany
		Name field, the name	es of the users vary.	
		Available options are	active users with th	e Bidder role
	defined at the enterprise level. b. Select the check boxes adjacent to the appropriate			
	users, and then click <b>Select</b> .			

#### 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 <u>4.1. Attachments</u>.

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

ADVERT	ADVERTISEMENT										
📄 Save	& Exit 🛛 🚺 Save &	Continue (	) Cancel	Workflow -	Select	Actions 👻					
ADVE	RTISEMENT DETAILS	BID ITEMS									
BID ITE	мs										
											2
Schedu Letter	lle Container Path	Option	Line Item No.	Pay Item No.	Description	Suppleme Description	Unit	Quantity	Unit Price (\$)	Alternate Num <b>be</b> r	
A	Schedule A		A0040	15201-0000	CONSTRUCTI ON SURVEY AND STAKING		LPSM	1.000	42,000.00	Í	
A	Schedule A		A0060	15301-0000	CONTRACTOR QUALITY CONTROL		LPSM	1.000	51,00 <b>0.0</b> 0		,
А	Schedule A		A0080	15401-0000	CONTRACTOR TESTING		LPSM	1.000	51,000.00		
A	Schedule A		A0100	15501-0000	CONSTRUCTI ON SCHEDULE		LPSM	1.000	30,000.00		
A	Schedule A		A0120	15701-0000	SOIL EROSION CONTROL		LPSM	1.000	50,000.00		
	Colordado A	_		15700 0000	STORM WATER		10014	1 000	10.000.00		,
ATTACHMENTS											
Ū 🗹	í 🛃										
	ile View Status	Document	Name	Url/Link	Title		Uploaded By	Uploa	ded Date	File Size	
No Attachments available											
Link D	Link Document Upload Document										

#### 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	
	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 <b>Pay Item No</b> 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 <b>Pay Item No</b> from the final engineer's
	estimate.
Supplemental Description	The additional description of the <b>Pay Item No</b> as defined in the final
	engineer's estimate.
Unit	The unit of the <b>Pay Item No</b> from the final engineer's estimate.
Quantity	The quantity of the <b>Pay Item No</b> as defined in the final engineer's
	estimate.
Unit Price (\$)	The unit price of the <b>Pay Item No</b> as defined in the final engineer's
	estimate.
Alternate Number	The sub container name of the <b>Pay Item No</b> as defined in the final
	engineer's estimate.
Description	The description of the <b>Pay Item No</b> from the final engineer's
	estimate.
Supplemental Description	The additional description of the <b>Pay Item No</b> 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.

New A+B Bidding		×
Schedule Letter *:	Select 🗸	
Admin Cost (\$) *:	0.00	
Estimated Number of *: Days		
Minimum Number of : Days		
Maximum Number of *: Days		
	Save Cancel	1

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.		
	<ul> <li>In the e-Bidding module, the bidder must enter the value of the (A+B) Number of Days field greater than or equal</li> </ul>		
	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 <u>4.1. Attachments</u>.
- 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

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

	PROJECTS	PR	DJECTS	
Q,	Type to Search X 🗙 🗙	Ð	New 🙀 Workflow 🗸 🗃 Reports 🗸 🖧	Manage Users 🏿 🦉 Mark Offline/Online 💮 More 🗸
	Select Project	0	Project Code	Project Name Project Description Business Unit
ta.	Recent Projects		T	
001			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
	SIT - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
ø	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

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**.

ADVE		EMENT Edit View Delete	History	Associate Workflow User(s) Show Pending On User(s)	Select Actions  Publish Advertisement Send for EE Revision	Merge and Attach rge and Download rge and Email	Reports	Attachments	t 7/2	♥ Mar ♥ Add ♥ Clea	nage I
G	SENER	LAL		WORKFLOW		MAIL MERGE		OTHERS	FILT	ERS	
<b>~</b>	Q	Solicitatio	on Number	Project Code	Project Name	Solicitation Procedure	Privacy		Privacy Notice		A+B Bid
			Ţ		Ţ	T		T		T	
		6982AF23	R000015	SIT - CA ERFO FS LSPD	SIT - Black Mountain R	Negotiated/RFP	Data car	nnot be releas	Source Selection	Infor	

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.

	PROJECTS	РК	OJECTS	
Q,	ype to Search 🗙 🗙 🔨	Ð	New 🖟 Workflow - 📋 Reports - 🗞	Manage Users 🛛 🏂 Mark Offline/Online 💮 More 👻
	Select Project 💌	0	Project Code	Project Name Project Description Business Unit
朣	Recent Projects		T	
RET	SIT - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
<u>(\$</u> )	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

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**.

AD	/ERTI	ISEMENT										
Nev	v	_∂ Edit ⊙ View Ⅲ Delete	History	Associate Workflow User(s) Show Pending On User(s)	Cancel Advertisen	ient	Merge and Attach erge and Download Merge and Email	Reports	<b>》</b> 副 眼	<b>%</b> None	ኘ 7 7	
	GEN	ERAL		WORKFLOW			MAIL MERGE	OTHERS	5	FILT	ERS	
<b>~</b>	Ø	Solicitati	on Number	Project Code	Project Name		Solicitation Procedure	Privacy		1	Privacy No	tice
			Ţ	T		T				Ţ		
		6982AF23	3R000015	SIT - CA ERFO FS LSPD	SIT - Black Mountain	R	Negotiated/RFP	Data car	nnot be	e releas	Source Sel	ection

Figure 15: Workflow Action – Cancel Advertisement

 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 <u>3.1.4.</u> 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 <u>4.3. Workflow Status</u> <u>Transitions.</u>

Phase	Current	Action	Action	Subsequent	Comments
	Workflow	Stakeholders		Workflow	
	Status			Status	
1.	Draft	Administrator	Publish	Advertisement	After the record is
		Acquisitions	Advertisement	Published	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	Pending EE	After the record is
			Revision	Revision	moved to the
					Pending EE Revision
					workflow status, the
					following changes
					occur:
					<ul> <li>The previous</li> </ul>
					Engineer's
					Estimate is in
					the <b>Final</b>
					Estimate
					workflow
					status and is
					automatically
					moved to the
					Arcnivea
					WORKTLOW
					status.
					• A version of
					the same

Phase	Current	Action	Action	Subsequent	Comments
	Workflow	Stakeholders		Workflow	
	Status			Status	
					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&gt;</system 		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 <b>EE</b> <b>Updated</b> workflow status. <b>Note:</b> 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	<ul> <li>Administrat or</li> <li>Acquisition s</li> </ul>	Publish Advertisement	Advertisement Published	After the record is moved to the Advertisement Published workflow status, the following changes occur: • The published Advertisemen t is available

Phase	Current	Action	Action	Subsequent	Comments
	Workflow	Stakeholders		Workflow	
	Status			Status	
					in the e- Bidding module.
					The published advertisement cannot be
				Developed FF	ealtea.
			Send for EE Revision	Pending EE Revision	After the record is moved to the <b>Pending EE Revision</b> 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
					<ul> <li>An email is sent to the users assigned with the Lead</li> </ul>

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					Designer role for the project.
4	Advertisem ent Published	<ul> <li>Administrat or</li> <li>Acquisition s</li> </ul>	Cancel Advertisement	Advertisement Canceled	project.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
					moved to the <b>Cancelled</b>

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

	PROJECTS	PR	OJECTS			
٩	ype to Search 🗙 🗙 🔨	Ð	New 🖟 Workflow 🗸 📋 Reports 🛪 👸	Manage Users 🛛 🛱 Mai	rk Offline/Online 💮 N	lore 🔻
	Select Project	0	Project Code	Project Name	Project Description	Business Unit
tr.			T	T	T	T
ШÆ	<ul> <li>Recent Projects</li> </ul>		SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
n n P	SIT - CA EREO ES LSPDR 2023-1(1)			nenuointe te interio otem		Tresterin cueror curros
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
(Q)	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands

Figure 16: Navigation to Projects Module

#### Federal Highway Administration

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



Figure 17: Expanding Projects Folder

- In the navigation pane, expand Bidding, and then click Advertisement.
   The ADVERTISEMENT list page is displayed.
- 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 <u>4.2. Standard Report</u>

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:

- <u>3.2.1. Create amendments</u>
- 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 <u>Table 2 Amendment Permission</u> Matrix.
- The associated advertisement is in the Advertisement Published workflow status. For more
  information on the advertising workflow, refer to Section <u>3.1.4. Advertisement Workflow Status.</u>
- 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 <u>3.2.3.</u> 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

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



Figure 18: Navigation to Projects Module

#### Federal Highway Administration

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



Figure 19: Expanding Projects Folder

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

	PROJECTS	AMENDMENT	
Q,	Type to Search 🗙 🗙 🔨	🞝 New 🔊 Workflow 👻 🖹 Reports 🗸 🕃 Excel Export 👻 💬 More 👻	T
	CA ERFO FS LSPDR 23072024 -	Solicitation Number Amendment Number Amendment Type Advertisement Date Bid Opening Date and Time Zone	
朣	General Quick Access	T     T     MM/dd/yyy     T     MM/dd/yyy     T       No records to display,     T     T     T     T	Ţ
	📩 CA ERFO FS LSPDR 23072024		
-{\$}	+ Documents		
	= Document Search		
	= Project Report Gallery		
	= Project Calendar		
	+ Fund Management		
	— Bid Estimate Information		
	- (CA ERFO FS LSPDR 230		
	Engineer's Estimate		
	— Bidding		
	<ul> <li>Advertisement</li> </ul>		
	Amendment		
	Bid Opening And Review		
>	Contracts		Page 1 of 1

Figure 20: List Page of Amendment Form

4. Click New.

#### The **AMENDMENT** page is displayed.

AMENDMENT		
Save & Exit Save & Continue	🛞 Cancel 📓 Workflow 👻 🍄 Select	Actions 🔻
AMENDMENT DETAILS AMENDMENT	ITEMS	
Solicitation Number :	67985430000FARO	Amendment Number : <auto generated=""></auto>
Amendment Type *:	Bid Items Change 🗙	Advertisement Date : 07/23/2024
Bid Opening Date and Time *:	07/23/2024 9:00 AM 📅 🖏	Time Zone : EST
Engineer's Estimate Update *: Required	● Yes 🔵 No	Allow Paper Bids 💠 🔽
Amendment Reason :	Bid Items Change	A
		2

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	The date and time as defined in the published advertisement or the			
Time	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 <b>Types catalog</b> of the library.						
Bid Opening Date and	Select the date and time at which the bids received from contractors						
Time	will be opened for analysis.						
	<ul> <li>Click is, and select the date.</li> </ul>						
	<ul> <li>Click, and select the time.</li> </ul>						

Field Name	Description
	Note: The entered date and time must be later than the current date
	and time.
Engineer's Estimate	Select the appropriate option, as applicable.
Update Required	
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.

AMENDMENT	it <b>[o</b> Sav	e & Continue	🛞 Cancel	户 Workfld	ow <del>-</del> • <u>°</u> • 9	Select Actions	-				
AMENDME	INT DETAILS	AMENDMENT	TEMS								
AMENDMEN	IT ITEMS										
Change Type	Line Item No.	Container Path	Option	Schedule Letter	Pay Item No.	Descripti	Supplem Descripti	Unit	Quantity	Unit Price (\$)	Alternate Number
New	12321	Schedule A		A	15214-2000	SURVEY AND STAKING, RETAINING WALL		LPSM	1.000	1,500.00	

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 <u>3.2.3. Amendment Workflow Status</u>

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	<ul> <li>Based on the change type of the pay item, the value is displayed.</li> <li>New: A new pay item is added.</li> <li>Update: The quantity of the existing pay item is modified.</li> <li>Delete: The existing pay item is deleted.</li> </ul>

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 <b>Pay Item No</b> from the latest engineer's
	estimate in the Final Estimate workflow status.
Supplemental Description	The additional description of the <b>Pay Item No</b> as defined in the
	latest engineer's estimate in the Final Estimate workflow status.
Unit	The unit of the <b>Pay Item No</b> from the latest engineer's estimate in
	the Final Estimate workflow status.
Quantity	The quantity of the <b>Pay Item No</b> as defined in the latest engineer's
	estimate in the Final Estimate workflow status.
Unit Price (\$)	The unit price of the <b>Pay Item No</b> as defined in the latest engineer's
	estimate in the Final Estimate workflow status.
Alternate Number	The sub container name of the <b>Pay Item No</b> 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.

	PROJECTS	PR	OJECTS	
Q,	ype to Search 🗙 🗙 🗙	Ð	New 🖟 Workflow 🗸 📋 Reports 🛪 🗞	Manage Users – 🎼 Mark Offline/Online – 💮 More 👻
	Select Project	0	Project Code	Project Name Project Description Business Unit
ta.	A Recent Projects			
	SIT - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
Ø	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

Figure 23: Navigation to Projects Module

#### Federal Highway Administration

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.

	PROJECTS	AMENDMENT					
С,	Type to Search 🗙 🗙 🔺	🗐 New 📓 Workflow 👻	🗎 Reports 👻 🕃 E	xcel Export 👻 💮 More	e <b>*</b>		T
î	CA ERFO FS LSPDR 23072024	Solicitation Number	Amendment Number	Amendment Type	Advertisement Date	Bid Opening Date and Time	Time Zone
۱.	General Quick Access			T	MM/dd/yyy 😸 📘	MM/dd/yyyy h: 📅 🗿 🍸	<b>T</b>
	CA ERFO FS LSPDR 23072024	67985430000FARO	A001	Bid Items Change	07/23/2024	07/23/2024 9:00 AM	EST
<b>(</b> 3)	+ Documents						
	<ul> <li>Document Search</li> </ul>						
	<ul> <li>Project Report Gallery</li> </ul>						
	<ul> <li>Project Calendar</li> </ul>						
	+ Fund Management						
	+ Bid Estimate Information						
	— Bidding						
	<ul> <li>Advertisement</li> </ul>						
	= Amendment						
	Bid Opening And Review						
	= Contracts						

Figure 25: List Page of the Amendment Form
#### Federal Highway Administration

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

# Select Actions.

AM	ENDMENT						
🌶 Edit 👁 View 🔟 Delete 🕅 Workflow 🗸			🔮 Select Actions 👻	🖹 Reports 👻 💮	1 Selected X	T	
	Solicitation Number	Amendment Number	Send for EE Revision	dvertisement Date	Bid Opening Date and Time	Time Zone	
			Publish Amendment	/M/dd/yyy 📅 🔽	MM/dd/yyyy h: 🗰 🗿 🍸		T
	67985430000FARO	A001		7/23/2024	07/23/2024 9:00 AM	EST	

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 <u>3.2.3</u>. <u>Amendment Workflow Status</u>.

# 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 <u>4.3. Workflow Status</u> <u>Transitions</u>.

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

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					<ul> <li>The published amendment cannot be edited.</li> <li>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.</li> </ul>
			Send for EE Revision	Pending EE Revision	To perform this workflow action, the <b>Engineer's Estimate</b> <b>Update Required</b> 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 <b>Draft</b> workflow status. <b>Note:</b> 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 <b>Pending EE Revision</b> workflow status, the following changes occur: • The previous Engineer's Estimate in the Final Estimate workflow status is automatically moved to the <b>Archived</b> workflow status. • A version of the same Engineer's Estimate record is automatically created in the <b>Draft</b> workflow status. • A notification email is sent to the users assigned with the Lead Designer role
					project.

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
2.	Pending EE Revision	<system Automated&gt;</system 		EE Updated	Once the newly created Engineer's Estimate version is moved to the <b>Final</b> <b>Estimate</b> 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 <b>Acquisitions</b> role for the project. <b>Note:</b> This workflow action cannot be performed manually.
3	EE Updated	<ul> <li>Administrator</li> <li>Acquisitions</li> </ul>	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 <b>Amendment</b> <b>Published</b> 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
					<ul> <li>A version of the same Engineer's Estimate record is</li> <li>automatically created in the <b>Draft</b> workflow status.</li> <li>A notification email is sent to the users assigned with the Lead Designer role for the project.</li> </ul>

# 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 <u>3.3.1. Bidder Accounts</u>.

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:

- <u>3.3.3. Submit bid responses</u>
- <u>3.3.4. Modify submitted bid responses</u>
- <u>3.3.5. Withdraw bids</u>
- <u>3.3.6. Acknowledge amendments</u>

#### 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:

- <u>3.3.1.1. Self-registering a Bidder Account</u>
- <u>3.3.1.2. Creating a bidder account by FHWA</u>

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.

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#### Steps

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

Rederal I Administr	of Transportation Highway ration
User Name	
Password	
Login	
New Federal Lands System Bidder	Forgot password?
O	23.1.1.20240919.15



#### The **BIDDER REGISTRATION** page is displayed.

		0.5. Department of Transportation Federal Highway Administration		
		USER REGISTRATION		
User Name 🕇			Company Name :	
First Name 🗄		]	UEI Number :	
Middle Name :		]	Business Type :	None selected $\star$
Last Name :		]	Address 1 :	
Password *		]	Address 2 :	
Confirm Password *:			City :	
Email ID 🕇		]	State :	Select One
Phone *		]	Zlp Code :	
Company :	Select One		Phone Number :	
Click Here to Add Company Details Manually :			Email ID :	
	Verification Code 🕇	Get Audio Code       Type the code from the image       Register     Reset       Cancel		
		Version : 23.1.1.20240919.15		

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
	<ul> <li>Address Line 1 and Line 2</li> </ul>
	City State Zin Code
	Bhana Number
	• Phone Number
	• Email ID
Click Here to Add Company	Select the check box if the company name does not exist in
Details Manually	the Company selection field.
	<b>Note:</b> If the check box is selected, then the Company field is
	nidden.
Compony Nomo	Enter the company name of the user.
Company Name	Note: If the company name is being entered manually, then
	All other details of the company, such as the Contact, OEI
	manually
Contact	By default, displays the details based on the selected
Contact	company
	Company. However you can edit the contact details if you are entering
	the company details manually
LIFI Number	By default, displays the details based on the selected
GEHNUMBER	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.

USE	USER ACCOUNTS							
Ð	New Reports - Br Excel Import / Export - O More -							
	User Name	First Name	Middle Na	Last Name	Email	Is Active?	Is Locked?	Mobile No
		Ţ	T	<b>T</b>				
	Rachel_ConstCom	Rachel		Rosen	Rachel_ConstCompLe	<b>~</b>		
	Ryan_ProjectEngi	Ryan		Denham	Ryan_ProjectEngineeA			
	Ryan_AsstProject	Ryan		Denham	Ryan_AsstProjectEngi	~		
	Ryan_InspectorAE	Ryan		Denham	Ryan_InspectorAE@au			
	Ryan DesignerofR	Ryan		Denham	Ryan DesignerofReco	~		
	Ryan_RegionalEn	Ryan		Denham	Ryan_RegionalEnginee	<b>V</b>		
	Ryan_ProjectEngi	Ryan		Denham	Ryan_ProjectEngineer	~		
	Ryan AsstProject	Ryan		Denham	Ryan AsstProjectEngi			
	Ryan_Inspector	Ryan		Denham	Ryan_Inspector@aurig	~		
	Ryan_ConstInspA	Ryan		Denham	Ryan_ConstInspAEMa			
	Ryan_ConstOpsEn	Ryan		Denham	Ryan_ConstOpsEngine	~		
	Ryan_ConstContr	Ryan		Denham	Ryan_ConstContrMan	<b>v</b>		
	Ryan_ConstContr	Ryan		Denham	Ryan_ConstContrQCM	2		
-	<b>D D D D D D D D D D</b>	-				-		•
M	I         1         2         3         4         5         6         7         8         9         10          ▶         ▶         ▶         Page 8 of 17							

Figure	31: List	Page of	fUser	Accounts
i igui c	01. 2130	I ugo ol	0301	Accounts

3. Click New.

The **ADD USER** page is displayed.

ADD USER	
Save & Exit Save & Continue 🛞 Can	zel
User Name *:	Address Line 1 :
First Name *:	Address Line 2 :
Middle Name :	Address Line 3 :
Last Name :	City :
Email *:	State :
Fax :	Country :
Company :	Zip Code :
Mobile Number :	Account Expiry Date : 09/23/2026 ~
Telephone :	Send Email Notification 💠 🔲
Certificate Number :	
Password *:	
Confirm Password *:	Business Unit *: Select 🗸 🗸
Type *: Interna	$\checkmark$
ASSIGN ROLES	
Available Roles	Associated Role(s)
A/E Designer	<u>A</u>
A/E Lead Designer A/E Manager	
A/E Support Tools	• • • • • • • • • • • • • • • • • • •

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
Туре	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	Enter the address of the user.
Line 2, and Address Line 3	
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 <a href="https://fhwamasterworkslive.com/link">https://fhwamasterworkslive.com/link</a>.

The login page is displayed.

U.S. Department of Transportation Federal Highway Administration							
User Name							
Password							
Login							
New Federal Lands System Bidder	Forgot password?						
O UAT Build- eDelivery © Aurigo Software Technologies, Inc. All rights reserved.	23.1.1.20240919.15						

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

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

			CONTRACTOR BIDDING LIST						
Q,	Type to Search 🛛 🗙	<b>×</b> ∧	🗊 Excel Export 👻 🕻	💮 Mare 👻					Т
T,			Solicitation Number	Advertisement Date	Solicitation Procedure	Competition Information	Workflow Status	Privacy	Pending On Rol
				MM/dd/yyy 🗰 🍸					
			6982AF23R000015	07/23/2024	Negotiated/RFP	Sole Source, 8a	Published	Data cannot be releas	Bidder
			SOL1	06/19/2024	Two-step Sealed Bid	Other	Submitted	Data is public	Bidder
			SOL1	06/17/2024	Design-Build	Other	Submitted	Data is public	Bidder
			69056721R000016	06/26/2023	Negotiated/RFP	MATOC Task Order	Published	Data cannot be releas	Bidder
									Þ
>									Page 1 of 1

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**.

CONTRACTOR BIDDING	CONTRACTOR BIDDING LIST							
_🖉 Edit 💿 View	🗗 Workflow 👻	Select Actions 👻 Θ	More 👻		1 Sele	ected X		
Solicitation Number	Advertisement Da	Bid in Progress	Competition Information	Workflow Status	Privacy	Pending On Re		
T	MM/dd/yyy				T			
6982AF23R000015	07/23/2024	Negotiated/RFP	Sole Source, 8a	Published	Data cannot be releas	Bidder		
SOL1	06/19/2024	Two-step Sealed Bid	Other	Submitted	Data is public	Bidder		

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.

CONTRACTOR BIDDING LIST					
🚡 Save & Exit 📑 Save & Continue 🛞 Cancel 🖓 Workflow 👻 🍄 Select Actions 👻					
ADVERTISEMENT BID ITEM DETAILS BIDDER DETAILS					
Solicitation Number : 66809721543 Advertisement Date	: 03/17/2025				
Project Code : PC011 Project Name	: Green Mountain Road				
Solicitation Procedure : Negotiated/REP Competition Information	: Sole Source, 8a				
A+B Bidding : Allow Paper Bids	:				
Bid Opening Date and Time : 03/17/2025 4:25 AM Time Zone	: EST				
Bid Opening Location : Lakewood, CO					
No. of Amendments : 0					
Upload a completed, signed copy of the bid guarantee and any other information required from the invitation for bid.					
ATTACHMENTS					
而 ば .*					
File View Status     Document Name     Url/Link     Title     Uploaded By	Uploaded Date File Size				
No Attachments available					
Link Document Upload Document					

#### 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.

#### Federal Highway Administration

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 <u>3.3.6. Acknowledging</u> 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.

CONTRACT											
al Save &	El Save & Exit Lo Save & Continue (8) Cancel 29 Workflow ~ 🐨 Select Actions ~										
ADVERT	ADVERTISEMENT BID ITEM DETAILS BIDDER DETAILS										
BID ITEMS	BID ITEMS										
Schedule Letter	Container Path	Option	Line Item No. 个	Pay Item No.	Description	Supplemental Description	Unit	Quantity	Unit Price (\$)	Alternate Number	
Α	Schedule A		A0040	15201-0000	CONSTRUCTION SURVEY AND STAKING		LPSM	1.000	0.00		
A	Schedule A		A0060	15301-0000	CONTRACTOR QUALITY CONTROL		LPSM	1.000	0.00		
A	Schedule A		A0080	15401-0000	CONTRACTOR TESTING		LPSM	1.000	0.00		
A	Schedule A		A0100	15501-0000	CONSTRUCTION SCHEDULE		LPSM	1.000	0.00		
A	Schedule A		A0120	15701-0000	SOIL EROSION CONTROL		LPSM	1.000	0.00		- 1
A	Schedule A		A0140	15720-0000	STORM WATER POLLUTION PREVENTION PLAN		LPSM	1.000	0.00		
A+B BIDD	A+B BIDDING										
Upload a	Unload a completed signed copy of the bid suscentee and any other information required from the invitation for bid										
		- 12	0	2							
ATTACH	MENTS										
4											h.

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	The supplemental description of the Pay Item			
	Description	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 <b>Standard Items Table</b>			
		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 change			
		done in the latest final engineer's estimate.			
		Available options are New and Update.			
		<ul> <li>If an item is added through</li> </ul>			
		amendment, then the column displays			
		New for the respective item row.			
		<ul> <li>If the quantity of an item is modified</li> </ul>			
		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	The minimum number of days as defined in			
	Days	the published advertisement.			
	Maximum Number of	The maximum number of days as defined in			
	Days	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.

CONTRACTOR BI	DDING LIST							
🔒 Save & Exit	Save & Continue	🛞 Cancel [	耐 Workflow 🔻	🐮 Select Actions 👻				
ADVERTISEMEN	NT BID ITEM DETAILS	BIDDER DETAILS						
BIDDER DETAIL	S INFORMATION							
Bi	d Submitter Name :	Test Bidder1			Bid Submitter P	hone :		
	Company :	Key Stone Limite	ed		Bid Submitter	Email : TestBi	dder1@aurigo.com	
	Business Type *:	8a Firm 🗙						
	Remarks :						-	
ADDRESSES							14	
								ď
ls Default	Use Address for Bid	Address 1	Address 2	City	State	Zip Code	Phone Number	
		Address 1	Address 2	Austin	тх	523523	421-421-4214	
		2400 Lakeline Rd		Austin	тх	578727	761-288-7224	Ŧ
Add Edit								
BIDDER GUARA	NTEE							
	Currentee Turen	Bid Bond	~		Guarantee Amou	nt(S) ;		0.00
	Guarantee Type .	Dia Dona						

Figure 38: Bidder Details Tab

Section	Field Name	Description
BIDDER DETAILS	Bid Submitter Name	The first name and last name of the logged-in
INFORMATION		user. Alternatively, you can modify the name
		as necessary.
	Company	The company of the logged-in user. This
		company name is displayed in the <b>Bid</b>
		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
		<b>Contractor Details</b> 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.

New Addresses	×
ls Default 🛛 🗌	
Use Address for Bid : 🔲	
Address 1 *: 2400 Lakeline Rd	
Address 2 :	
City *: Austin	
State *: TX	~
Zip Code *: 578727	
Phone Number *: 761-288-7221	
Save Cancel	

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:
	<ul> <li>If this check box is selected, the same address is updated in the Contractor Details catalog of the library.</li> </ul>
	<ul> <li>If you mark more than one address as default, then an error message is displayed while saving the bid response.</li> </ul>
Use Address for Bid	Select the check box to ensure the address is used for bidding.

Column Name	Description
	Note:
	<ul> <li>The default address is automatically selected as Use Address for Bid. However, you can select any other address by selecting this check box.</li> <li>If you mark more than one address as for bidding, then an error message is displayed while saving the bid</li> </ul>
Addross 1	Tesponse.
Address I	
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 <b>State/Territory</b>
	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.

Edit Addresses	>	<
ls Default		
Use Address for Bid		
Address 1 *	2400 Lakeline Rd	
Address 2		
City *	Austin	
State *	TX 🗸	
Zip Code *	578727	
Phone Number *	761-288-7224	
	Save Cancel	

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	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 <b>Guarantee Type</b> 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 <u>4.1. Attachments</u>.
- 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**.

CONTRACTOR BIDDING LIST							
_🖉 Edit 💿 View	🛯 Workflow 👻 📲	Select Actions 👻 💮 🛛	More 👻				
Solicitation Number	Advertisement Da	Submit Bid	Competition Information	Workflow Status	Privacy	Pending On Role(s)	
6982AF23R000015	07/23/2024	Negotiated/RFP	Sole Source, 8a	Bid in Progress	Data cannot be releas	Bidder	
SOL1	06/19/2024	Two-step Sealed Bid	Other	Submitted	Data is public	Bidder	

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**.

CONTRACTOR BIDDING LIST							
🖋 Edit 💿 View 😥 Workflow - 📽 Select Actions - 💬 More -							
Solicitation Number	Advertisement Da	Return to Bid in Progress Withdraw	Competition Information	Workflow Status	Privacy	Pending On Role(s)	
6982AF23R000015	07/23/2024		Sole Source, 8a	Submitted	Data cannot be releas	Bidder	
SOL1	06/19/2024	Two-step Sealed Bid	Other	Submitted	Data is public	Bidder	

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.

flow 👻 📲 Select Actions 👻					
	Advertisement Date	03/17/2025			
	Project Name	: Green Mountain Road			
	Competition Information	Sole Source, 8a			
	Allow Paper Bids				
Bid Opening Date and Time : 03/17/2025 4:25 AM Time Zone : EST					
Upload a completed, signed copy of the bid guarantee and any other information required from the invitation for bid.					
r Title	Uploaded By	Uploaded Date	File Size		
	cflow - ** Select Actions -	cflow ~ ** Select Actions ~ Advertisement Date Project Name Competition Information Allow Paper Bids Time Zone rother information required from the invitation for bid.	xflow ▼ Select Actions ▼ Advertisement Date : 03/17/2025 Project Name : Green Mountain Road Competition Information : Sole Source, 8a Allow Paper Bids : Time Zone : EST rother Information required from the invitation for bid.		

Figure 43: Contractor Bidding List Page

- 4. To edit the bidding details, refer to Section <u>3.3.3. Submitting a Bid Response.</u>
- 5. To edit the bidder details, refer to Section <u>3.3.3. Submitting a Bid Response.</u>
- 6. 6. In the **ATTACHMENTS** section, upload or link files related to the bid guarantee. For information on attachments, refer to <u>Section 4.1. Attachments</u>.
- 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**.

CONTRACTOR BIDDING LIST							
_🖉 Edit 💿 View	🕅 Workflow 👻	📽 Select Actions 👻 💮	More 👻				
Solicitation Number	Advertisement Da	Return to Bid in Progress	Competition Information	Workflow Status	Privacy	Pending On Role(s)	
	MM/dd/yyy	Withdraw	U				
6982AF23R000015	07/23/2024		Sole Source, 8a	Submitted	Data cannot be releas	Bidder	
SOL1	06/19/2024	Two-step Sealed Bid	Other	Submitted	Data is public	Bidder	

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 <u>3.3.7. e-Bidding</u> <u>Workflow Status.</u>

# 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.

CONTRACTOR BIDDING LIST								
🗈 Save & Exit 🕞 Save & Continue 🛞 Cancel 📓 Workfle	w 👻 💱 Select Actions 👻							
ADVERTISEMENT BID ITEM DETAILS BIDDER DETAILS								
Solicitation Number : 67985430000FARO	Advertisement Date : 07/23/2024							
Solicitation Procedure : Negotiated/RFP	Competition Information :							
A+B Bidding : 🗌	Allow Paper Bids 💠 🗹							
Bid Opening Date and Time : 07/23/2024 9:30 AM	Time Zone : EST							
Bid Opening Location : Texas								
No. of Amendments : 1								
Click here to acknowledge Amendments before bid submission								
Upload a completed, signed copy of the bid guarantee and any o	, her information required from the invitation for bid.							
ATTACHMENTS								
D         File View Status         Document Name         Url/Link	Title Uploaded By Uploaded Date File Size							
No Attachments available								
Link Document Upload Document								

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.

EBI	DDING AMENDMENT						
<b>M</b>	Workflow 👻 👫 Excel	Export 👻 💮 More 👻					T
	Solicitation Number	Amendment Number	Amendment Type	Advertisement Date	Bid Opening Date and Time	Time Zone	Allow Pape
			T	MM/dd/yyy 🗰 📘	MM/dd/yyyy h: 📅 🗿 🍸	T	
	67985430000FARO	A001	Bid Items Change,Bid	07/23/2024	07/23/2024 9:30 AM	EST	~

Figure 46: E-bidding Amendment List page

 To keep yourself updated on the modifications made to the advertised bid and submit a wellanalyzed 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.

EBIDDING AMENDMENT							
🛞 Cancel 🛛 🗗 Workflow 👻 🍄 Select Actions 👻							
AMENDMENT DETAILS AMENDMENT ITEMS							
Solicitation Number : 67985430000FARO	Amendment Number : A001						
Amendment Type : Bid Items Change, Bid Oper	ning Advertisement Date : 07/23/2024						
Date Change	Time Zone : EST						
Bid Opening Date and Time : 07/23/2024 9:30 AM							
Allow Paper Bids 💠 🔽							

Figure 47: EBidding Amendment Details Page

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.

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

#### Federal Highway Administration

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

EBIDDING AN	IENDMENT									
🙁 Cancel	🖲 Cancel 📲 Workflow 👻 🌋 Select Actions 👻									
AMENDMENT DETAILS AMENDMENT ITEMS										
										ď
Change Type	Line Item No.	Container Path	Option	Schedule Letter	Pay Item No.	Description	Suppleme Description	Unit	Quantity	Alternate Number
New	12321	Schedule A		A	15214-2000	SURVEY AND STAKING, RETAINING WALL		LPSM	1.000	

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 <b>Pay</b>
	Item No is defined as Base or Option in the final engineer's
	estimate.
	If a <b>Pay Item No</b> is defined as <b>Option</b> , 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 <b>Pay Item No</b> from the final engineer's
	estimate.
Supplemental	The additional description of the Pay Item No as defined in the
Description	final engineer's estimate.
Unit	The unit of the <b>Pay Item No</b> from the final engineer's estimate.
Quantity	The quantity of the <b>Pay Item No</b> as defined in the final engineer's
	estimate.
Unit Price (\$)	The unit price of the <b>Pay Item No</b> as defined in the final
	engineer's estimate.
Alternate Number	The sub container name of the <b>Pay Item No</b> 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.** 

EBI	DDING AMENDMENT						
۲	View 🕅 Workflow 🗸	Select Actions 👻				1 Selected	X T
	Solicitation Number	Acknowledge	Amendment Type	Advertisement Date	Bid Opening Date and Time	Time Zone	Allow Pap
		T	Ţ	MM/dd/yyy 🗰 🍸	MM/dd/yyyy h: 😸 🗿 📘		
	67985430000FARO	A001	Bid Items Change,Bid	07/23/2024	07/23/2024 9:30 AM	EST	

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 <u>3.3.3. Submitting a Bid Response</u>.

# 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 <u>Section 4.3. Workflow Status</u> <u>Transitions</u>.

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	<ul> <li>To perform this workflow action, ensure the following conditions are met: <ul> <li>All the amendment records are acknowledged.</li> <li>The bid opening date and time have not passed.</li> <li>The unit price and quantity are filled for all the bid items.</li> <li>At least one attachment related</li> </ul> </li> </ul>

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

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					is not reversible.
		<system Automated&gt;</system 		Bid Corrections Required	is not reversible. 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.
					<ul> <li>A notification email is sent to the bidder who have submitted the bid.</li> </ul>
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
					<ul> <li>At least one attachment related to bid guarantee is uploaded or available.</li> </ul>

# 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:

- <u>3.4.1. Review bids</u>
- <u>3.4.2. Import bids</u>
- <u>3.4.3. Award bids</u>

### 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:
  - $\circ$  Administrator
  - Acquisitions

 Construction Component Lead
 For more information on role-specific permissions, refer to <u>Table 3 – Bid Opening and Review</u> 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.

PROJECTS		PR	PROJECTS				
🔍 Type to Search 🗙 🗙 🔨			🞝 New 👔 Workflow - 🖹 Reports - 🎝 Manage Users 🎼 Mark Offline/Online 💮 More -				
	Select Project 👻	0	Project Code	Project Name	Project Description	Business Unit	
朣	Recent Projects		Y	T	Y	Y	
909	SIT - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	
<u>(s)</u>	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	

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.

	PROJECTS	PROJECT DASHBOARD PROJECT DETAILS
С,	Type to Search 🗙 🗙 🔨	🙀 Select Dashboard: bis sc. 🗸 Mode: View 🗸 💭 New 📝 Edit 🍈 Delete 🦓 Set As Default
	Type to Search  SIT - CA ERFO IS LSPDR 2023-1(1) General Quick Access SIT - CA ERFO FS LSPDR 2023-1(1) COMMENTS Documents Document Search Document Search Project Report Gallery Project Calendar Project Calendar Project Fund Itst Project Fund Iransaction Funding Rules	Image: Select Dashboard: bis sc.     Image: Mode: View     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.       Report Viewer     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.       Report Viewer     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.       Report Viewer     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.       Report Viewer     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.       Report Viewer     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.       Report Viewer     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.       Report Viewer     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.       Report Viewer     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.       Report Viewer     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.       Report Viewer     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.     Image: Select Dashboard: bis sc.       Report Viewer     Image: Select Dash
	+ Bid Estimate Information + Bidding	
	+ Contracts	

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.

	PROJECTS	BID	OPEN	IING AND R	EVIEW									
Q	Type to Search 🗙 🗙 🔨	÷	: נ	🖉 Edit 🏵 View		🔗 Associate	• <u>•</u> •	Select Actions 🕶	Merge and	d Attach d Download		5) Ba	52	ዋ የ
Û	SIT - CA ERFO FS LSPDR 2023-1 💌	Nev	″ 1	🔟 Delete	History	දීල Show Pending On U	er(s)		📴 Merge and	d Email	Reports	R	None	*7
朣	General Quick Access		GENE	RAL		WORKFLOV	í .		MAIL M	ERGE	OTHER	85	FILTERS	
:::	SIT - CA ERFO FS LSPDR 2023		0	Contract	or	Total Bid Amount (	5) (A+B)	Bid Opening Da	ite and Time	Awarded So	hedules an	d Options	Available	e for Later Award
向	+ Documents							MM/dd/yyyy						
NOK.			0	Key Ston	e Limited	2,753,872.89		07/23/2024 3:20	0:00 AM					
	Document Search													
	Project Report Gallery													
	<ul> <li>Project Calendar</li> </ul>													
	+ Fund Management													
	+ Bid Estimate Information													
	— Bidding													
	<ul> <li>Advertisement</li> </ul>													
	Amendment													
	Bid Opening And Review													
	<ul> <li>Contracts</li> </ul>													

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

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

BID OPENING AND REVIEW				
🚯 Save & Exit 🔹 Save & Continue	(ancel 🔄 Workflow	▼ Select Actions ▼		
REVIEW BID ITEMS BIDDER DETAIL	LS			
BID TABULATION				
Schedules and Options :	Select			
Alternate :				
Generate Bid Tabulation				
BID TABULATION				
Contractor		Workflow Status		A: Bid Items Total (\$) (Engineer's Estimate (\$) : 0.00)
No records to display.				
SCHEDULE AWARD INFORMATION	ı			
Awarded Schedules and Options	A×			
Awarded Alternates :				
			_	
Available for Later Award :	Select	Possil	bly Awarded Schedule : authorized Amount (\$)	0.00
Alternates available for Later : Award				
Bid Amount (\$) :	2,753,87	2.89	Award Date : (	17/23/2024 🗸
Incentives Amount (\$) :		0.00	Contract # : e	982AF24C000004
Award Amount (\$) :	2,753,87	2.89	Task Order # :	
Authorized Amount (\$) :	16 620 94	7.83	Remarks :	

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	Bid Amount (\$)	Based on the values selected in the Awarded
AWARD		Schedules and Options field, it displays the
INFORMATION		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	Based on the values selected in the Available for
	Authorized Amount (\$)	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.

Alternate						×
0 selected of tot	al D					
	Schedule Letter	T Line Number	<b>T</b> Pay Item No.	🝸 Pay Item Desc		T
•						Þ
	► ► 40 ▼ items				No items to display	Ċ
		s	elect Cancel			

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.

BID OPENING AND REVIEW									
🚡 Save & Exit 🛛 🚡 Save & Continue 🏵 Cancel	🖉 Workflow 👻 🧣 Select Actions 👻								
REVIEW BID ITEMS BIDDER DETAILS	REVIEW BID ITEMS BIDDER DETAILS								
■ BID TABULATION	E BID TABULATION								
Schedules and Options : A×									
Alternate :									
Generate Bid Tabulation									
BID TABULATION			I						
Contractor	Workflow Status	A: Bid Items Total (\$) (Engineer's Estimate (\$) : 2162850.00)	A: Total (\$)						
Key Stone Limited	Received	2,753,872.89	2,753,872.89						
al m									

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 (\$)</schedule>	The total amount of bid items for the schedule in the
(Engineer's Estimate (\$)	final engineer's estimate.
<schedule letter="">: A+B Cost (\$)</schedule>	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 (\$)</schedule>	The sum of <schedule letter="">: Bid Items Total (\$)</schedule>
	(Engineer's Estimate (\$)) and <schedule letter="">: A+B</schedule>
	Cost (\$).
Bid Total (\$)	The sum of <schedule letter="">: Total (\$) and <option>:</option></schedule>
	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.
	Alternate X
	Sthedule Letter T Line Number T Pay Item No. T Pay Item Desc T
	K O D M 40 - Arms No terrs to display G
	Select Cancel
	Figure 56: Alternate Dialog Box
	The list displays all alternates added for the schedules and
	options in the final engineer's estimate.
	b. Soloot the enprepriate alternates, and then aligh <b>Calent</b>
	b. Select the appropriate alternates, and then click <b>Select</b> .
	final anginaaria astimate
	Inat engineer's estimate.
	• If multiple alternates are available for a schedule or option, you
	can select only one from each category.
	• If an alternate is selected as <b>Available for Later Award</b> , 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	To select the alternates for awarding later, perform the following				
Award	steps:				
	a. Click -				
	The Alternate dialog box is displayed.				
	0 selected of total 0				
	Schedule Letter Y Line Number Y Pay Item No. Y Pay Item Desc Y				
	No ferms to display G				
	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 <b>Select</b> .				
	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.

BID OPENING	AND REVIEW												
Save & Exi	t 🚺 Sav	e & Continue	Cance	l ि∰ Work	cflow 👻 📍	😮 Select Acti	ons 🔻						
REVIEW	BID ITEMS	BIDDER DETA	ULS										
	s												۲ř
Schedule Letter	Option	Container Path	Line Item No.	Pay Item No.	Descripti	Supplemer Description	ntal n	Jnit	Unit Price (\$)	Quantity	Amount(\$)	Alternate Number	
A		Schedule A	A0040	15201-0000	CONSTRUCTION SURVET AND STAKING	T Y	L	PSM	56,571.31	1.000	56,571.31		Î
A		Schedule A	A0060	15301-0000	CONTRACT OR QUALIT CONTROL	Y	L	PSM	230,295.32	1.000	230,295.32		
A		Schedule A	A0080	15401-0000	CONTRACT OR TESTING		L	PSM	81,166.80	1.000	81,166.80		
A		Schedule A	A0100	15501-0000	CONSTRUC ION SCHEDULE	т	L	PSM	15,614.02	1.000	15,614.02		
A		Schedule A	A0120	15701-0000	SOIL EROSION CONTROL		L	PSM	142,792.32	1.000	142,792.32		
					STORM								Ŧ
INCENTIV		ontainer Li	ine Pay		. Su	pplemental			. Estin	nate's Bid	Unit Price	Incenti	Ľí ve
Letter	Option Pa	ath It	em Item	Descrip	tion De	scription	Unit	Quant	ity Unit Pri	ice ( <b>\$</b> )	(\$)	Amount	(\$)

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	The supplemental description of the Pay Item
	Description	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				
Section INCENTIVE ITEMS		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	The supplemental description of the Pay Item				
	Description	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	The number of days as defined in the				
	Bid	submitted bid in the e-Bidding module or in				
		the paper bid.				
	Estimated Number of	The estimated number of days as defined in				
	Days	the published advertisement.				
	Minimum Number of	The minimum number of days as defined in				
	Days	the published advertisement.				
	Maximum Number of	The maximum number of days as defined in				
	Days	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.

BID OPENING AND REVIEW							
🚡 Save & Exit 🛛 🚡 Save & Continue 🛞 Cancel	🕅 Workflow 👻 🍟	Select Actions 👻					
BID CORRECTION REMARKS		7					
Bid Correction Remarks :							
	7						
ATTACHMENTS							
俞 🗹 🕹							
File View Status     Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size	GPS Latitude	GPS L
Ready <u>Actions - Copy</u> <u>Items.png</u>	NA	Actions - Copy Items	Administrator	07/23/2024 6:03 AM	80.34KB		
Link Document Upload Document							

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.

BID OPENING AND	REVIEW							
🔒 Save & Exit 🛛 🗌	Save & Continue	🏽 Cancel 🔤	Workflow 👻	Select Actions 👻				
REVIEW BID II	TEMS BIDDER DETAIL	LS						
BIDDER DETAILS INFORMATION								
Bid	Submitter Name *:	Test Bidder1			Bid Submitter P	hone *: 123-8	67-5309	
	Company *:	Key Stone Limited			Bid Submitter	Email *: TestB	dder1@aurigo.com	
		_			Business	Type *: 8a Fir	m <b>X</b>	
	Is Paper Bid? :							
	Remarks :						* *	
ADDRESSES							~~	
								Ľ
ls Default	Use Address for Bid	Address 1	Address 2	City	State	Zip Code	Phone Number	
		Address 1	Address 2	Austin	тх	523523	421-421-4214	-
~	<b>V</b>	2400 Lakeline Rd		Austin	ТХ	578727	761-288-7224	Ŧ
BID GUARANTEE								
	Guarantee Type :	Bid Bond	~		Guarantee Amou	nt (\$) :	(	0.00
	Dand an Charle #	Diaborid	-					
	Bonu of Check # :							

Figure 60: Bidder Details Tab

The following information is displayed:

Section	Field Name	Description	
<b>BIDDER DETAILS</b>	Bid Submitter Name	The first name and last name of the bidder as	
INFORMATION		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 <b>e-Bidding</b> 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 <b>e-Bidding</b>			
		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 <b>e-Bidding</b>			
		module, whichever applicable.			
	City	The city as defined in the <b>Contractor Details</b>			
		catalog of the library for the company addresses of			
		the bidder or the submitted bid in the <b>e-Bidding</b>			
		module, whichever applicable.			
	State	The state as defined in the <b>Contractor Details</b>			
		catalog of the library for the company addresses of			
		the bidder or the submitted bid in the <b>e-Bidding</b>			
		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 <b>e-Bidding</b>			
		module or in the paper bid.			
	Guarantee Amount (\$)	The guarantee amount as defined in the submitted			
		bid in <b>the e-Bidding</b> module or in the paper bid.			

- 11. Optionally, in the **ATTACHMENTS** section, upload or link related files. For information on attachments, refer to Section <u>4.1. Attachments</u>.
- 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:
  - $\circ$  Administrator
  - Acquisitions
     For more information on role-specific permissions, refer to <u>Table 3 Bid Opening and Review</u> <u>Permission Matrix</u>.

#### 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.

PROJECTS		PR	DJECTS	
🔍 Type to Search 🗙 🗙 🗙		Ð	New 📲 Workflow 🛪 📳 Reports 🛪 🖓	Manage Users 🛛 🛱 Mark Offline/Online 💮 More 👻
	Select Project 👻	0	Project Code	Project Name Project Description Business Unit
讘	Recent Projects		Y	
ent			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
SIT - CA ERFO FS LSPDR 2023-1(1)			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

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.

BID OPENING AND REVIEW	
🚡 Save & Exit 📑 Save & Continue 🛞 Cancel 🏚 Workflow 👻	📽 Select Actions 👻
REVIEW BID ITEMS BIDDER DETAILS	î
E BID TABULATION	
Schedules and Options : A 🗙	
Alternate :	
Generate Bid Tabulation BID TABULATION	
Contractor Workflow Status	A: Bid Items Total (\$) (Engineer's Estimate (\$) : 50000.00) A: A+B Cost (\$) A: Total (\$)
No records to display.	
4	

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
	<b>Options</b> 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
	<b>Options</b> 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
	<b>Options</b> 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 <b>CON</b> type account
	codes.
Possibly Awarded Schedule	Based on the values selected in the <b>Available for Later Award</b>
Authorized Amount (\$)	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.

BID OPENING AND REVIEW							
🚡 Save & Exit 📑 Save & Continue	🛞 Cancel 📓	Workflow 👻 🍟	Select Actions 🝷				
REVIEW BID ITEMS BIDDER DETA	ul.s						
BIDDER DETAILS INFORMATION							
Bid Submitter Name 🍍	: Mike			Bid Submitter Ph	none : 123-867-53	309	
Company *	Key Stone Limited			Bid Submitter E	mail *: mike@ama	ail.com	
ls Paper Bid?				Business 1	Type : 8a Firm 🗙		
Remarks	:					•	
ADDRESSES							
Is Default Use Address for Bid	Address 1	Address 2	City	State	Zip Code	Phone Number	<u></u>
	Address 1	Address 2	Austin	тх	523523	421-421-4214	
	2400 Lakeline Rd		Austin	тх	578727	761-288-7224	
Add Edit							
BID GUARANTEE							
Guarantee Type	Bid Bond	*		Guarantee Amour	nt (\$) :	0.00	

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	Descri	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				
		Company Name	T Business Type		
		Key Stone Limited	8a Firm		
		Jacobs Engineering	Emerging Small Business		
		ESCO Construction Co	Economically Disadvantaged Women Owned Small Business		
		vss international, inc.	vereran cuwhed small Business		
		Captain Construction	Small Desiness Small Disarbantaned Breiness		
		Charles Electrical Services ELC	Small Business Small Disadvantaged Business		
		Inplace Concrete			
		Island Roads Corporation	Large Business		
		Jaca & Sierra			
		JMT Survey			
		Lee Construction Group, Inc	Small Disadvantaged Business, Small Business		
		McClain & Co, Inc	Large Business		
		Metro Paving Corp.	Small Disadvantaged Business		
			Small Businese Women Owned Small Businese 1 - 40 of 79 items		
		Select	Cencel		
		Figure 66: Com	pany Picker Dialog Box		

Field	Description				
	<ul> <li>Available options are active companies defined in the Contractor Details catalog of the library.</li> <li>ii. Select the appropriate company name, and then click Select. Upon selecting the company, the following updates occur:</li> <li>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.</li> <li>The ADDRESSES section displays the following information:</li> </ul>				
	<ul> <li>Is Default: The check box selection as defined in</li> </ul>				
	the Contractor Details catalog of the library for the selected company.				
	<ul> <li>Use Address for Bid: The check box selection as defined in the Contractor Details catalog of the library for the selected company.</li> </ul>				
	<ul> <li>Address 1: The address as defined in the Contractor Details catalog of the library for the selected company.</li> </ul>				
	<ul> <li>Address 2: The address as defined in the Contractor Details catalog of the library for the selected company.</li> </ul>				
	<ul> <li>City: The city as defined in the Contractor Details catalog of the library for the selected company.</li> </ul>				
	<ul> <li>State: The state as defined in the Contractor Details catalog of the library for the selected company.</li> </ul>				
	<ul> <li>Zip Code: The postal code as defined in the Contractor Details catalog of the library for the selected company.</li> </ul>				
	• <b>Phone Number</b> : 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.

New Addresses		×
Is Default :		
Use Address for Bid :		
Address 1 *:	2400 Lakeline Rd	
Address 2 *:	Extension	
City *:	Austin	
State *:	TX 🗸	
Zip Code *:	578727	
Phone Number *:	761-288-7221	
	Save Cancel	

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:		
	<ul> <li>If this check box is selected, the same address is updated in the Contractor Details catalog of the library.</li> </ul>		
	<ul> <li>If you mark more than one address as default, then an error message is displayed upon performing the save action.</li> </ul>		
Use Address for Bid	Select the check box to ensure the address is used for bidding.		
	Note:		
	• The default address is automatically selected as <b>Use Address for Bid</b> . However, you can select other address by selecting this check box for that address.		
	<ul> <li>If you mark more than one address to use for bidding, then an error message is displayed upon performing the save action.</li> </ul>		
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.

Edit Addresses		×
ls Default :		
Use Address for Bid :		
Address 1 *:	2400 Lakeline Rd	
Address 2 :		
City *:	Austin	
State *:	TX 🗸	
Zip Code *:	578727	
Phone Number *:	761-288-7224	
	Save Cancel	

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.

BID OPENING	S AND REVIEW												
🗟 Save & Ex	kit 🚺 Sav	e & Continue	( Cancel	┣Î Workfl	low 👻 🐮	Select Actions 🔻	💮 More	•				4	• +
REVIEW	BID ITEMS	BIDDER DETAI	s										i
🖃 BID ITEN	IS										r2		
Schedule Letter	Option	Container Path	Line Item No.	Pay Item No.	Descripti	Supplemental Description	Unit	Unit Price (\$)	Quantity	Amount(\$)	Alternate Number		
A		Schedule A	A0001	15201-0000	CONSTRUCT ION SURVEY AND STAKING		LPSM	0.00	1.000	0.00			
													1
Schedule	Option C	ontainer Ite	e Pay m Item	Descripti	on	lemental Unit	Quantit	Estima	ite's Bid U	nit Price	Incentive		4

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	The supplemental description of the Pay Item No.
	Description	
INCENTIVE	Schedule Letter	The schedule as defined in the final engineer's estimate.
ITEMS	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 <b>Pay Item No</b> from the final
		engineer's estimate.
	Supplemental	The supplemental description of the Pay Item No as
	Description	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 <b>Pay Item No</b> as defined in the final
		engineer's estimate.
	Estimate's Unit	The unit price of the <b>Pay Item No</b> as defined in the final
	Price (\$)	engineer's estimate.
A+B BIDDING	Schedule Letter	The schedule as defined in the advertisement.
	Estimated	The estimated number of days as defined in the
	Number of Days	advertisement.
	Minimum	The minimum number of days as defined in the
	Number of Days	advertisement.
	Maximum	The maximum number of days as defined in the
	Number of Days	advertisement.
	Admin Cost (\$)	The admin cost as defined in the advertisement.

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

BID OPENING AND REVIEW										
🖺 Save & Exit 📑 Save & Continue 🛞 Cancel 🧟 Workflow 🗸 🍄 Select Actions 🔻 💬 More 🗸										
REVIEW BID ITEMS BIDDER DETAILS	Et Excel Import / Export ► Excel Import									
BID ITEMS	Excel Template With Data (xlsx)									

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.

IMPORT DETAILS FROM EXCEL FILE	
Back	
Select File	Choose File No file chosen Upload Save

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 <u>4.1. Attachments</u>.

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 <u>3.4.1. Reviewing a Bid.</u>

## 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:
  - $\circ$  Acquisitions
  - o Administrator
  - o 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 <u>3.4.1. Reviewing a Bid.</u>

#### Steps

1. In the module menu, click Projects.

The **PROJECTS** list page is displayed.

	PROJECTS	PR	DJECTS	
Q,	Type to Search 🗙 🗙 🔨	Ð,	New 🖟 Workflow 🗸 📋 Reports 🛪 🗞	Manage Users 🏿 🖗 Mark Offline/Online 💮 More 👻
	Select Project	0	Project Code	Project Name Project Description Business Unit
擂	Recent Projects			
800			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
	STI - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
ø	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
	J		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

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.

	PROJECTS	BID C	PENING AND	REVIEW									
۹ ۵	Type to Search X X	P New	_∮ Edit ⊕ View ∭ Delete	History	Associate Workflow User(s) Show Pending On User(s)	• <b>2</b> *	Select Actions 🕶	Merge and Merge and Merge and	d Attach d Download d Email	Reports	2 52 10	None	マ ヤ ヤ
讘	General Quick Access	(	GENERAL		WORKFLOW			MAIL M	ERGE	OTHER	S	FILTERS	
	SIT - CA ERFO FS LSPDR 2023		0 Contrac	tor	Total Bid Amount (\$) (/	A+B)	Bid Opening Da	ite and Time	Awarded 5	chedules an	d Options	Available	e for Later Award
\$	+ Documents		C Key Sto	ne Limited	2,753,872.89		07/23/2024 3:20	0:00 AM					
	Document Search												
	Project Report Gallery												
	<ul> <li>Project Calendar</li> </ul>												
	+ Fund Management												
	+ Bid Estimate Information												
	— Bidding												
	<ul> <li>Advertisement</li> </ul>												
	<ul> <li>Amendment</li> </ul>												
	Bid Opening And Review												
	Contracts												

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** 

Ac	tio	ns.											
B	ID OP	ENING AND I	REVIEW										
	<b>D</b> lew	_Ø Edit	History	<ul> <li>         Associate Associate Workflow User(s) Age Show Pending On User(s)         </li> </ul>		Select Actions - Mark as Non-Res Send to Bidder fo	Merge an ponsive or Corrections	d Attach Download Email	Reports	2 14 15 16	None	ያ 4 2 2	
	GEI	NERAL		WORKFLOW		Award Mark as Withdraw	810	RGE	OTHER	15	FILTERS		
~	U U	Contrac	tor		.i	MM/dd/yyyy		Awarded S	chedules and			e for Lat	er Awar
-	6	Key Stor	ne Limited	2,753,872.89		07/23/2024 3:2	0:00 AM	А					

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 <u>4.3. Workflow Status</u> <u>Transitions.</u>

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 <b>SCHEDULE</b> <b>AWARD</b> <b>INFORMATION</b> section, the Awarded Schedules and Options, Contract, and Award Date

Phase	Current Workflow	Action Stakeholders	Action	Subsequent Workflow	Comments
	Status			Status	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&gt;</system 		Received	Once the bidder resubmits the bid in the e-Bidding module, the following changes occur: The corresponding bid in the <b>Bid</b> <b>Opening And</b> <b>Review</b> 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	<ul><li>Acquisitions</li><li>Administrator</li></ul>	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
					<ul> <li>No bid is moved to the Awarded workflow status.</li> </ul>
5	Awarded	<ul> <li>Acquisitions</li> <li>Administrator</li> <li>Construction Component Lead</li> </ul>	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.

	PROJECTS	PR	DJECTS	
Q,	Type to Search 🗙 🗙 🔨	Ð	New 🙀 Workflow 🗸 📋 Reports 🛪 🗞	Manage Users 🛛 🛱 Mark Offline/Online 💮 More 👻
	Select Project 👻	0	Project Code	Project Name Project Description Business Unit
挿	Recent Projects		T	
en 1			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
SIT - CA ERFO FS LSPDR 2023-1(1)			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
Ø	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

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.

	PROJECTS	BID OF	PENING AND R	EVIEW									
م 1	Type to Search X X	₽ New	_Ø Edit ⊗ View Î Delete	History	Associate	•°	Select Actions 🛩	<ul> <li>Merge and</li> <li>Merge and</li> <li>Merge and</li> <li>Merge and</li> </ul>	d Attach d Download d Email	Reports	2 2 2	None	9 7 7
L.	General Quick Access	GE	ENERAL		WDRKFLOW			MAIL M	ERGE	OTHERS	i	FILTERS	i
::::	SIT - CA ERFO FS LSPDR 2023		) Contract	tor	Total Bid Amount (\$	) (A+B)	Bid Opening Da	ite and Time	Awarded Se	chedules and	Options	Availabl	e for Later Award
۹	+ Documents		[] Key Ston	e Limited	2,753,872.89		07/23/2024 3:20	0:00 AM					
	Document Search												
	Project Report Gallery												
	<ul> <li>Project Calendar</li> </ul>												
	+ Fund Management												
	+ Bid Estimate Information												
	— Bidding												
	<ul> <li>Advertisement</li> </ul>												
	<ul> <li>Amendment</li> </ul>												
	Bid Opening And Review												
	<ul> <li>Contracts</li> </ul>												

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 <u>4.2. Standard Report</u> <u>Functions.</u>

# 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:

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

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**.

Account Priority : CON03-CON04 Authorized Amount (S) : 0.00 Expended Amount (S) : 0.00 Probable Expenditure (S) : 0.00 Remaining Amount (S) : 0.00 Notes : 0.00 Notes : 0.00 File View Status Document Na Url/Link Title Uploaded By Uploaded Date File Size No Attachments available	
Account Priority :   Authorized Amount (\$) :   Expended Amount (\$) :   Probable Expenditure (\$) :   Probable Expenditure (\$) :   Remaining Amount (\$) :   Notes :	ALLOUIL NUMBER
Authorized Amount (\$) : 0.00   Expended Amount (\$) : 0.00   Probable Expenditure (\$) : 0.00   Remaining Amount (\$) : 0.00   Notes : 0.00	Account Priority
Expended Amount (S) : 0.00 Probable Expenditure (S) : 0.00 Remaining Amount (S) : 0.00 Notes : 0.	Authorized Amount (\$)
Probable Expenditure (\$) : 0.00   Remaining Amount (\$) : 0.00   Notes : 0.00   ATTACHMENTS	Expended Amount (\$)
Remaining Amount (\$) :       0.00         Notes :	Probable Expenditure (\$)
ATTACHMENTS	Remaining Amount (\$)
ATTACHMENTS	Notes
Im     <	ATTACHMENTS
File View Status         Document Na         Url/Link         Title         Uploaded By         Uploaded Date         File Size	ê ≤ ±
No Attachments available	File View Status Docu
Link Document Upload Document	No Attachments available

Figure 80: Using Upload Document Option

#### The **Open** dialog box is displayed.

rganize • New	folder				≣• □	
A Home		Name	^		Date modified	
		A01_Library_Managem	nent_PG_ditamap-1	0001	5/24/2023 3:08 PM	Ŭ.
		A01_Library_Managem	nent_PG_ditamap-1	0002	5/25/2023 5:23 PN	li 1
E Desktop		A01_Library_Managem	nent_PG_ditamap-1	0002	5/25/2023 5:23 PN	Č.
Documents 🖋		A01_Library_Managem	nent_PG_ditamap-1	0004	5/30/2023 11:04 A	М
🛓 Downloads  🖈		A01_Library_Managem	nent_PG_Draft		5/29/2023 10:06 P	М
Pictures 🖉		Adding_an_Engineers_	Estimate_Item_dita	-1000	6/21/2023 12:29 A	М
🚱 Music 🛛 🖈	•	Adding_an_Engineers_	Estimate_Item_dita	Addin	6/15/2023 1:03 PM	t)
Videos 🖋		7		_		
Fil	le name:			All files		- 24

#### 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.

$\rightarrow \sim 1$	r 📜 «	FHWA > Publishe V C Search	Published PDF	
Drganize 👻 Ne	ew folder		≣ • □	
A Home		Name	Date modified	
		A01_Library_Management_PG_ditamap-10001	5/24/2023 3:08 PM	
	- 1	A01_Library_Management_PG_ditamap-10002	5/25/2023 5:23 PM	
E Desktop	*	A01_Library_Management_PG_ditamap-10002	5/25/2023 5:23 PM	
Documents	*	A01_Library_Management_PG_ditamap-10004	5/30/2023 11:04 AM	
🛓 Downloads	*	A01_Library_Management_PG_Draft	5/29/2023 10:06 PM	
🔀 Pictures	*	Adding_an_Engineers_Estimate_Item_dita-1000	6/21/2023 12:29 AM	
🕑 Music	*	Adding_an_Engineers_Estimate_Item_ditaAddin	6/15/2023 1:03 PM	
🚺 Videos	*			
	File name:	All file	s	
		c	Open Cancel	

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.

Save & Exit	ave & Continue	🙁 Cancel 🙀	Workflow - 🏦 Sele	ect Actions 👻		
ALLU		1010040027201.040	J.C.N.V/UU.U4.1			
Acco	ount Priority :	CON03-CON04	~			
Authorized	i Amount (\$) :		0.00			
Expended	Amount (\$) :		0.00			
Probable Exp	enditure (\$) :		0.00			
Remaining	g Amount (\$) :		0.00			
	Notes :		*			
TACHMENTS			M			
Ì 🖬 🛨						
File View Status	Document Na	me Uri/Link	Title	Uploaded By	Uploaded Date	File Size
	Fund Managem FHWA.docx	ent in	Document - FM	/ Mike Ross	07-27-2023 3:05 AM	13 KB
Link Document	Upload Documen	t				

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.

Link Document			×
MasterWorks Document	O Upload and Link New Document	External Document	
Folder : Rn-FHWA	-2607, RESTORATION OF NORTHER	N RAILS 🗸	
		Search Clear Search	
Document Name	Title	Created By	Created Date
No Link available			
	ОК	Cancel	

#### Figure 85: Link Document Dialog Box

#### 2. Click Masterworks Document.

Link Document		>	×
MasterWorks Document	O Upload and Link New Document	O External Document	
Folder : Rn-FH	WA-2607, RESTORATION OF NORTHERN	I RAILS 🗸	
	OK Cancel		

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.

Link Document			×	
MasterWorks Document     O Upload and Link New Document     O External Document				
Folder :       Rn-FHWA-2607, RESTORATION OF NORTHERN RAILS         Search       Clear Search				
Document Name	Title	Created By	Created Date	
Fund Management in FHWA.docx	Document - FM	Mike Ross	07-27-2023 3:17 AM	
OK Cancel				

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.

Link Document			×		
MasterWorks Document	O Upload and Link New Document	O External Document			
Folder : SIT - CA HBP CR104(1) ET AL, SIT - TRINITY COUNTY HBP BRIDGES 🗸					
	S	Gearch Clear Search			
Document Name	Title	Created By	Created Date		
No Link available					
OK Cancel					

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.

PROJECT FUND LIST	ontinue 🛞 Cance	। 🎦 Workflow 👻	🗳 Select Actions 👻			++
Account Pri	ority : CON03-CO	N04 🗸				A
Authorized Amour	nt (S) :	0.00				
Expended Amour	nt (S) :	0.00				
Probable Expenditur	re (\$) :	0.00				
Remaining Amour	nt (\$) :	0.00				
N	lotes :	▲ %:				
ATTACHMENTS						
ñ 🗹 土						
File View Status	Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size
	Fund Management in FHWA.docx	RESTORATION OF NORTHERN RAILS/Documents	Document - FM	Mike Ross	07-27-2023 3:25 AM	1 <b>2.77</b> KB
Link Document Upload	Document					

#### 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.

- PROJECT FUND LIST Save & Exit Save & Continue 🐮 Select Actions 👻 🛞 Cancel 🛛 🕅 Workflow 👻 Account Number . 1010045027201.040.019.7700.04.1 Account Priority : CON03-CON04 ~ Authorized Amount (\$) : 0.00 Expended Amount (\$) : 0.00 Probable Expenditure (\$) : 0.00 Remaining Amount (\$) : 0.00 ۸ Notes : V ATTACHMENTS 前 🗹 土 **File View Status** Url/Link Title Uploaded By Uploaded Date File Size Document Na...  $\square$ No Attachments available Upload Document Link Document Figure 90: Using Link Document Option
- 1. In the ATTACHMENTS section, click Link Document.

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

Link Document			×
MasterWorks Document	O Upload and Link New Document	C External Document	
Folder : Rn-FHW/	A-2607, RESTORATION OF NORTHERN F	RAILS V	
	Se	arch Clear Search	
Document Name	Title	Created By	Created Date
No Link available			
	ОК	Cancel	

Figure 91: Link Document Dialog Box

#### Federal Highway Administration

2. Click Upload and Link New Document.

Link Document		×
O MasterWorks Document	OUpload and Link New Document	O External Document
Folder : Rn-FH	NA-2607, RESTORATION OF NORTHER	N RAILS 🗸
	OK Cancel	

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.

NEW DOCUMENT		
Save & Exit 🛞 Canc	21	
43		
Title	EHWA Restoration of Northern Ra	
New Document		Select files
Template Document	Oused as Template Document for Mail Merge)	
Workflow	None 🗸	
	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 dropdown 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**.

Save & Exit	Save & Continue	🛞 Cancel	Morkflow	- ' <u>'</u>	Select Actio	ns 🔻	-	1
	Account Number .	13100430272	01.340.011.9700.0	4.1				
	Account Priority :	CON03-CON04	4	~				
Aut	horized Amount (\$) :		0.	.00				
Ex	pended Amount (\$) :		0.	.00				
Proba	ble Expenditure (\$) :		0.	.00				
Ren	naining Amount (\$) :		0.	.00				
	Notes :			▲ ▼/				
TTACHMENTS								
🖻 🗹 土								
File View	/ Status Docume	nt Na Url/	Link Title	Uploa	ided By L	Jploaded Date	File Size	
No Attachment	s available	5.40						
Link Docume	nt Upload Docume	ent						

Figure 94: Using Link Document Option

#### 2. Click External Document.

Link Document	×	
O MasterWorks Docume	ent Oupload and Link New Document Octavenal Document	
Url/Link:	https://	
Title :		
	OK Cancel	

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

'Select Actions -, and then click the appropriate workflow action. 2. Click Select Actions

asterWorks							
	Notes :				1.		
Set Days To Complete fo	r Next Stage :		1				
ACHMENTS							
1				<i></i>		-	da -
The second s	Document Name	Title	Uploaded By	Uploaded Date	File Size	GPS Latitude	GPS Longitude
File View Status	Discuttering training		and the second se		and the second second second		

Figure 97: Masterworks Dialog Box

3. In the ATTACHMENTS section, click Upload Document.



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**.

**Federal Highway** 

Administration

rganize * New fold	er	≣ • □
A Home	Name	Date modified
	A01_Library_Management_PG_ditamap-10001	5/24/2023 3:08 PM
	A01_Library_Management_PG_ditamap-10002	5/25/2023 5:23 PM
🔲 Desktop 🛛 🖈	A01_Library_Management_PG_ditamap-10002	5/25/2023 5:23 PM
📔 Documents 🖈	A01_Library_Management_PG_ditamap-10004	5/30/2023 11:04 AM
🛓 Downloads 🏾 🖈	A01_Library_Management_PG_Draft	5/29/2023 10:06 PM
🚬 Pictures 🛛 🖈	Adding_an_Engineers_Estimate_Item_dita-1000	6/21/2023 12:29 AM
🕑 Music 🛛 🖈	Adding_an_Engineers_Estimate_Item_ditaAddin	6/15/2023 1:03 PM
🚺 Videos 🛛 🖈		
File na	ame: V All files	

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.

and the second sec						
Set Days To Complete for Next Stage : 2			0			
CHMENTS						
File View Status	Documer	nt Name	Title	Uploaded By	Uploaded Date	File Size
	FHWA	notes.docx	Project Fund Document	John	12/11/2023 4:58 AM	32 KB

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 <u>Section 4.2.2</u>. <u>Viewing the Workflow History</u>

# 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.

	PROJECTS	PRO	DJECT F	UND LIST				
Q,	Type to Search 🗙 🗙 🔨	Ð	New	🕅 Workflow 👻 🗎	Reports 👻 🗄 Excel Ex	port 🔹 💮 More 👻		
Ŷ	SIT - CA ERFO FS LSPDR 2023-1(1 🔻		0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description
١.	General Quick Access			T	T	T	T	<b>T</b>
000				PFL-4	CON04	CON04	CON	CLIN00101: ERFO
	511 - CA ERPO PS LSPDR 2023-1(1)			PFL-3	CON03	CON03	CON	Option X
<b>(</b> \$}	+ Documents			PFL-2	CON02	CON02	CON	CLIN00101: ERFO
	Document Search	-						
	Project Report Gallery	U		PFL-1	CONDI	CONUT	CON	CLINUUTUT: NON-ERFO
	Project Calendar							
	<ul> <li>Fund Management</li> </ul>							
	Project Fund List							
	Project Fund Transaction							
	<ul> <li>Funding Rules</li> </ul>							

Figure 101: Project Fund List Page

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2. Click More, and then click Attachments.

PRO	OJECT F	UND LIST			
÷D	New	函 Workflow - 🗐	Reports 👻 🖓t Excel Ex	kport 👻	💮 More 👻
	9	Project Fund ID	Fund Source Name	Fund So	Customize List
	0	PFL-4	CON04	CON04	Re Audit Log
		PFL-3	CON03	CON03	CON
		PFL-2	CON02	CON02	CON
		PFL-1	CON01	CON01	CON

Figure 102: Using Attachments Option

#### The attachments of all the records are listed.

PR	DJECT FUND LIST DOCUME	NTS									
€											
	Record Identifier	Document Name	Version	Url/Link	Title	Туре	Size	Created On			
	Ţ	T			T			MM/dd/ 🔠 🗿 🔽			
	PFL-2 / CON02	Project_Fund_List_Att achments_FHWA	1		Angela	PDF	7574.29 KB	12/14/2023 6:32 AM			

Figure 103: List of Attachments

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

PR	ОЈЕСТ И	FUND LIST					
_0	Edit	💿 View 🔟 Delete	🖟 Workflow 👻 📋	Reports 👻 🧧 Mail M	erge 💌	💮 More 🔻	
	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund So	Attachme	Description
		PFL-2	CON02	CON02	CON		
		PFL-1	CON01	CON01	CON		TS90

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.

	PROJECTS	PRO	JECT F	UND LIST					
Q,	Type to Search 🗙 🗙 🔨	🞝 New 🕅 Workflow - 🖆 Reports - 🥄 t Excel Export - 😁 More -							
þ	SIT - CA ERFO FS LSPDR 2023-1(1 💌		0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description	
14	General Quick Access			T	T	<b>T</b>	T		
rn:	SIT - CA FREQ ES I SPDR 2023-1(1)			PFL-4	CON04	CON04	CON	CLIN00101: ERFO	
	1511 - CA ERFO FS LSPDR 2023-1(1)			PFL-3	CON03	CON03	CON	Option X	
<b>Q</b>	. + Documents			PFL-2	CON02	CON02	CON	CLIN00101: ERFO	
	Document Search			PFL-1	CON01	CON01	CON	CLIN00101: Non-ERFO	
	Project Report Gallery								
	Project Calendar								
	<ul> <li>Fund Management</li> </ul>								
	Project Fund List								
	<ul> <li>Project Fund Transaction</li> </ul>								
	= Funding Rules								

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.

PRO	DJEC⊤ F	UND LIST				
_0	Edit	💿 View 🔟 Delete	🖟 Workflow 👻 📽	Select Actions 👻 📓 R	Reports 👻 🙋 Mail Mer	ge 🔹 💮 More
	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description
			T	T		
	0	PFL-4	CON04	CON04	CON	

Figure 106: Using View Option

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

Edit 🛞 Cancel	層 Workflow	•					+
Ac	count Priority :	CON03-CON0	)4				
Authorize	ed Amount (\$) :			0.00			
Expende	ed Amount (\$) :			0.00			
Probable E	kpenditure (\$) :			0.00			
Remainir							
	Notes :			<b>A</b> <b>y</b> /			
TACHMENTS							
2			-				
File View Statu	is Docume	nt Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size
🔽 🖲 Ready	<u>Fund Mar</u> <u>FHWA.do</u>	nagement in cx	NA		Mike Ross	07-27-2023 4:31 AM	12.77KB
			NIA		Mike Ross	07-27-2023 4·30 AM	92 13KB

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.
	pugo io uiopiuyou.

	PROJECTS	PRO	PROJECT FUND LIST							
Q,	Type to Search 🗙 🗙 🔨	Ð,	🞝 New 📓 Workflow - 📓 Reports - 🕃 Excel Export - 😁 More -							
	SIT - CA ERFO FS LSPDR 2023-1(1 💌		0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description		
臣	General Quick Access			T	T	T	T	T		
en B				PFL-4	CON04	CON04	CON	CLIN00101: ERFO		
	SIT - CA ERFO FS LSPDR 2023-1(1)			PFL-3	CON03	CON03	CON	Option X		
<b>Q</b>	+ Documents			PFL-2	CON02	CON02	CON	CLIN00101: ERFO		
	Document Search			PFL-1	CON01	CON01	CON	CLIN00101: Non-ERFO		
	Project Report Gallery	_								
	Project Calendar									
	<ul> <li>Fund Management</li> </ul>									
	Project Fund List									
	<ul> <li>Project Fund Transaction</li> </ul>									
	Funding Rules									

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.

Workflow Status & H	listory		×						
Workflow Status			Hide 🔨						
Selected	Status Cur	rent Status							
Published     Approve									
Workflow History									
Workflow Status :	Published	Workflow Status :	Approved						
Received On :	07-26-2023 7:34:08 AM	Received On :	07-27-2023 5:32:06 AM						
Action :	Approve	Action :							
Action Notes :		Action Notes :							
Action By :	Mike Ross	Action By :							
Due Date :	07-26-2023 7:34:08 AM	Due Date :	07-27-2023 5:32:06 AM						
Action Status :	Action Completed	Action Status :	Action Pending						
	More Details	Cancel							

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.

HISTORY					
() Close					
Record Identifier : PFL-4/CON04					
Workflow Status					Hide 🔨
Selected Status	Current Status				
• Draît Publish •	Publisher Approve	•	Approved	• Inactive	• End Stage
Workflow History					Hide 🔨
	Action Pending	Action Completed	Action Failed Workflow	Completed	
() Status	Received On	Action	Action Notes	Action On	Action By
T	t d T	T	T	1 0 T	T
Draft	07-26-2023 7:34 AM	Publish		07-26-2023 7:34 AM	User10
		Figure 110:History	Page		

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

) (1	Draft	07-26-2023 7:34 AM	Publich		07-	26-2023 7-34 AM	Licer10				
0	Published	07-26-2023 7:34 AM	Approve		07-	27-2023 5:32 AM	Mike@01				
	Approved	07-27-2023 5:32 AM									
Show Workflow History Report											
			Show Wor	rkflow History Repor	t						
ITA			Show Wor	rkflow History Repor	t						
FTA	CHMENTS	Document Name	Show Wor Url/Link	rkflow History Repor	t Uploaded By	Uploaded Da	ate File				

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.

PRO	PROJECT FUND LIST											
Ð,	New	🗗 Workflow 👻 📋	Reports 👻 🛱 Excel Ex	(port 🔻	💮 More 🔻							
	Ø	Project Fund ID	Fund Source Name	Fund So	Customize List							
	ρ	PFL-4	CON04	CON04	Attachments							
		PFL-3	CON03	CON03								
		PFL-2	CON02	CON02	CON							
		PFL-1	CON01	CON01	CON							

Figure 113: Using Attachments Option

c. Various document management features are available for attachments.

PRO	DJECT FUND LIST DOCUME	NTS										
€	) Back 💮 More 🔻											
	Record Identifier	Document Name	Version	Url/Link	Title	Туре	Size	Created On				
	T				T	T		MM/dd/ 🔠 🗿 🔽				
	PFL-2 / CON02	Project_Fund_List_Att achments_FHWA	1		Angela	PDF	7574.29 KB	12/14/2023 6:32 AM				

Figure 114: List of Attachments

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

A	ATTACHMENTS											
	~	File View Status	Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size				
		Ready	Project Fund List Attac hments FHWA	NA	Project_Fund_List_	Angela	12/14/2023 6:32 AM	7574.29KB				
	Link Document Upload Document											



# 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:

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

# 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:

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

#### 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.

	PROJECTS	PROJECT REPORT GALLERY
٩,	Type to Search 🗙 🗙 🔨	Report
	SIT - CA ERFO FS LSPDR 2023-1(1 🔻	✓ Acquisition Reports
<b>I</b> ≩	General Quick Access	Awarded Bid Schedule Report
	SIT - CA ERFO FS LSPDR 2023-1(1)	Bid Analysis Report
۲	+ Documents	Bid Schedule Report
	Document Search	Bid Tabulation Report
	Project Report Gallery	Obligation Tabulation Report
	Project Calendar	
	<ul> <li>Fund Management</li> </ul>	
	Project Fund List	
	Project Fund Transaction	
	Funding Rules	
	+ Bid Estimate Information	
	+ Bidding	
	+ Contracts	

Figure 117: Project Report Gallery Navigation Page

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

	PROJECTS	co	NTRACT REPORT GALLERY
9	Type to Search 🗙 🗙 🔨		Report
	SIT - CA ERFO FS LSPDR 2023-1(1)	~	Change Orders
讘	General Quick Access		Change Order By Date Report
:::	▲ Configurations	~	Contract Modifications
٩	Contract Items		CM Affected Pay Item Report
	+ Progress Tracking		Contract Modification Report
	+ Billings & Payments	¥	General(Contract dashboards)
	Contract Modifications		Contract Summary Report
	<ul> <li>Submittals</li> </ul>		Grand pay item summary report
	Contract Report Gallery	~	Progress payments
	+ Subcontract		Government Receiving Report
	<ul> <li>Contract Closeout Status</li> </ul>		Pay Note Report
	<ul> <li>Claims</li> </ul>		Pay Note Summary Report
	Freedom of Information		Progress Payment Penort
	Request for Equitable A		Program Dumont Donart/Contractor/e Version)
	CDR NAVIGATION PAGE		riogress rayment report contractor's versiony
>	IDR NAVIGATION PAGE		Progress Payment Schedule Summary Report

Figure 118: Contract Report Gallery Navigation Page

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

LIST PAGE REPORT         Isst page REPORT         Isst page REPORT         Include Pending on Users and Boles       Nn         View Report         Image: Strain and Boles       Nn         Image: Strain and Boles       Nn       Image: Strain and Boles         Image: Strain and Boles       Nn       Image: Strain and Boles       Nn         Image: Strain and Boles       Nn       Image: Strain and Boles       Nn         Image: Strain and Boles       Nn       Image: Strain and Boles       Nn         Project       Fund       Fund       Fund       Expended       Remaining Amount (\$)         Project       Fund       Source       Fund       Description       Number       Priority       Amount (\$)       Amount (\$)         PFL-1       CON01       CON1       CON       FLAP       This project       1516043       0.00       0.00       0.00       0.00       0.00       0.00       0.00       0.00       0.00       0.00       0.00	The repo	he report is generated and displayed.									
Include Pending on Users and Roles       No         View Report         Image: Subscribe       Image: Subscribe         View Report       Image: Subscribe         Image: Subscribe       Image: Subscribe         Project       Fund       Next       Image: Subscribe         Project       Fund       Source       Fund       Fund       Description       Account       Account       Authorized       Expended       Remaining         Project       Fund       Source       Type       Source       Description       Number       Priority       Amount (\$)       Amount (\$)       Amount (\$)         PFL-1       CON01       CON01       CON       FLAP       This project       1516043       0.00       0	LIST PAGE F	LIST PAGE REPORT									
Include Pending on Users and Roles       No         View Report         I of 1       I of 1 <thi 1<="" of="" th="">       I of 1       <thi 1<="" of="" th="">       I of 1       I of 1</thi></thi>	🕒 Back	D Subscrib	e								
Project Fund ID       Fund Source Name       Fund Code       Fund Type       Fund Source Category       Fund Description Fund ID       Account Number       Authorized Priority       Expended Amount (\$)       Remainin Amount (\$)         PFL-1       CON01       CON01       CON       FLAP       This project fund source Category       1516043 027201.5 40.CN.V7 00.04.16 0400000       0.00       0.00       0.00       0.00	Include Pending on Users and Roles No.										
PROJECT FUND LIST - LIST REPORTProject Fund IDFund Source CodeFund TypeFund Source CategoryFund DescriptionAccount NumberAuthorized PriorityExpended Amount (\$)Remaining Amount (\$)PFL-1CON01CON01CONFLAPThis project fund list for Category1516043 027201.5 40.CN.V7 00.04.160.000.000.00		of 1 🕨 🌢			Find   Ne:	d 🗎 🕶 🚱					
Project Fund Fund NameFund Source CodeFund TypeFund Source CategoryFund DescriptionAccount 	PROJECT FUND LIST - LIST REPORT										
PFL-1         CON01         CON         FLAP         This project fund list for category         1516043 027201.5         0.00         0.00         0.00         0.00           0.00         0.	Project Fund ID	Fund Source Name	Fund Source Code	Fund Type	Fund Source Category	Fund Description	Account Number	Account Priority	Authorized Amount (\$)	Expended Amount (\$)	Remaininį Amount (§
0.25255	PFL-1	CON01	CON01	CON	FLAP	This project fund list for fund source category FLAP.	1516043 027201.5 40.CN.V7 00.04.16 0400000 0.25255		0.00	0.00	0.00
PFL-2 CON02 CON02 CON FLAP 1516043 CON02- 0.00 0.00 0.00	PFL-2	CON02	CON02	CON	FLAP		1516043	CON02-	0.00	0.00	0.00

Figure 119: Using View Report Option

### 4.2.1.2 Printing a Report

#### Steps

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

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

LIST PAGE	LIST PAGE REPORT									
🕞 Back	💩 Subscrib	)e								
Include Pend	ing on Users an	d Roles No			~					
View Report										
1	of 1 🕨 🌢			Find   Ne	d <b>⊡ - 5</b>					
				PF	ROJECT FUN	ID LIST -	LIST REF	PORT		Î
Project Fund ID	Fund Source Name	Fund Source Code	Fund Type	Fund Source Category	Fund Description	Account Number	Account Priority	Authorized Amount (\$)	Expended Amount (\$)	Remaininį Amount (\$
PFL-1	CON01	CON01	CON	FLAP	This project fund list for fund source category FLAP.	1516043 027201.5 40.CN.V7 00.04.16 0400000 0.25255		0.00	0.00	0.00
PFL-2	CON02	CON02	CON	FLAP		1516043	CON02-	0.00	0.00	0.00

Figure 120: Using Print Report Option

# 4.2.1.3 Saving a Report

#### Steps

- 1. Generate the required report. For more information, refer to <u>Section 4.2.1.1. Generating a Report</u>
- 2. In the report toolbar, click **Export**, and then click the required option.

PROJECT STATUS REP	ORT							
🕞 Back 💩 Sub	scribe							
Report Version	Active Projects	~	Per	rcent Con	nplete Greater T	han 90		
Positive \$ Value Differen	ce 100000		Nej	gative \$ \	alue Difference	100000		
View Report								
┥ ┥ 📘 of 1 🕨		Find	Next	<b>)</b> • (	> 🚍		^	
			٩ ٦٦	Excel				
			C	CSV (com	ma delimited)			
Project Number Proj	ject Name	Contract number	COE		Award Date	Original FCD	Modified FCD	Acceptance Date

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 <u>Section 4.2.1.1. Generating a Report</u>
- 2. In the report toolbar, click Refresh 🤷

LIST PAGE R	LIST PAGE REPORT									
🕒 Back	🛯 Subscrib	e								
Include Pendi	ng on Users an	d Roles No			~					
View Report										
1	of 1 🕨 🌢	<u>a</u>		Find   Nex	d <b>⊡ - 5</b>					
	PROJECT FUND LIST - LIST REPORT									
Project Fund ID	Fund Source Name	Fund Source Code	Fund Type	Fund Source Category	Fund Description	Account Number	Account Priority	Authorized Amount (\$)	Expended Amount (\$)	Remaininį Amount (§
PFL-1	CON01	CON01	CON	FLAP	This project fund list for fund source category FLAP.	1516043 027201.5 40.CN.V7 00.04.16 0400000 0.25255		0.00	0.00	0.00
PFL-2	CON02	CON02	CON	FLAP		1516043	CON02-	0.00	0.00	0.00

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

Subscribe

BID ANALYSIS REPORT	cribe		
Bidder :	Missouri River Contractors, LLC 🗸	Minimum Deviation % :	
Maximum Deviation % :			
View Report			

Figure 123: Subscribing a Report

#### The subscription dialog box is displayed.

SIT Testing Build- FHWA eDe	livery	×
Delivery Option Sch	hedule Details	1
Please select the delivery optic	on Share	
	то *:	
	Cc :	
	Bcc :	
	(Use (;) to separate multiple e-ma <b>Reply-To</b> :	ail addresses.)
	Subject *:	
	Priority : Normal	~
c	Comment :	1
	Include Report	
Repor	rt Format : PDF	~
S	tart Date : 07-27-2023 v	
Enable sche	dule stop : 🗍	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:

000 011	the delivery option beteeted, perform the	1011011	
	E-Mail		Windows File Share
а.	In the <b>To</b> box, enter the email	a.	In the File Name box, enter the file name
	addresses of the recipients of the		for the report.
	report.	b.	Select the <b>Add</b> a file extension when the file
b.	In the <b>Reply-To</b> box, enter the email		is created check box to save the report file
	addresses of the recipients to whom		name with the extension of the file format
	the reply email must be delivered.		as required for the report.
с.	In the <b>Subject</b> box, enter the name of	с.	In the <b>Path</b> box, enter the path of the
	the report or any other appropriate		shared file location where the report must
	subject for the email.		be saved.
d.	From the <b>Priority</b> drop-down list, select		<b>Note</b> : To configure the shared file location
	the priority of the email. If the selected		in the application, you must provide the file
	priority is High, the email will be sent as		path location to the <b>Administrator</b> .
	a High Priority notification.	a.	From the <b>Report Format</b> drop-down list,
e.	In the <b>Comment</b> box, enter any		select the format in which the report must
	included in the body of the email	0	be generated and saved.
f	Select the <b>Include Pepert</b> check bey to	е.	share section, enter the credentials to
1.	deliver the report in the selected format		access the shared location and save the
	as an email attachment		report
ø	Select the <b>Include Link</b> check box to	f	From the <b>Overwrite</b> options section click
0.	deliver the link to the report in the		any of the following options:
	report delivery email. The recipient can	•	Overwrite an existing file with a newer
	view the report on the application only		version - When saving the report at the file
	if the recipient has the required		location at the scheduled time, if a file with
	permissions on the report.		the same name exists, then the existing file
h.	From the Report Format drop- down		is overwritten by the latest report.
	list, select the format in which the	•	Do not overwrite the file if a previous
	report must be generated and delivered		version exists - When saving the report at
	to the specified email addresses.		the file location at the scheduled time, if a
i.	From the <b>Start Date</b> list, click the date		file with the same name exists, then the
	from when the report must be		report is not overwritten by the latest
	delivered.		report, and the report is not saved at the
j.	Select the <b>Stop this schedule on</b>		file location.
	Check box, and then select the date	•	Increment file names as newer versions are
	until the report must be delivered.		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 <b>Start Date</b> list, click the date
from when the report must be saved.
h. Select the <b>Stop</b> 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.

Testing build- Privi	Cedenvery	
Delivery Option	Schedule Details	
O Hourly	Runs only once	
O Daily	Start time (hh:mm) *: :	
O Weekly		
O Monthly		
Once		
	Subscribe	Cancel
	Subscribe	CallCel

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

Option	Description	Steps
		to get the report delivered periodically once every specified number of days. c. In the <b>Start time (hh:mm)</b> 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.	<ul> <li>a. Click Weekly in the delivery options list.</li> <li>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.</li> <li>c. In the On day(s) section, select the days on which the report must be delivered.</li> <li>d. In the Start time (hh:mm) box, enter the time (in 24-hour format) the report must be delivered.</li> </ul>
Monthly	The report is delivered monthly on preset days of a selected week.	<ul> <li>a. Click Monthly in the delivery options list.</li> <li>b. Select the months when the report must be delivered.</li> <li>c. Click one of the following options to schedule the delivery of the report: <ul> <li>On week of the month</li> <li>i. From the list of weeks, select the week the report must be delivered.</li> <li>ii. In the On day(s) section, select the days the report must be delivered in the week previously selected.</li> <li>On Calendar day(s)</li> <li>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 12<sup>th</sup> 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.</li> </ul> </li> <li>d. In the Start time (hh:mm) box, enter the time (in 24-hour format) by when the report must be delivered.</li> </ul>
Once	The report is delivered once on the current day.	In the <b>Start time (hh:mm)</b> 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.





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

RE	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			
м						Page 1 of 1			

Figure 128: Report Subscriptions List Page

3. Select a report subscription, and then click **Delete**.

A confirmation message is displayed.

	REPORT SU	BSCRIPTIONS LIST					
1	🕅 Delete	🖳 Audit Log					1 Selected X
C	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
C	/fhwasi	tdm/Engine	01/11/2024 1:56 PM	Lahoucine lo Ouhssay	Email	At 1:0, starting 01/11/2	Home >Projects >Laho



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
- <u>4.2.2. Viewing the Workflow History</u>
- <u>4.2.3. Selecting Workflow Users</u>
- <u>4.2.4. Associating a Workflow</u>

# 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:

Se	elect the appropriate record.										
PR	ојест р	UND LIST									
_0	Edit	📀 View 🔟 Del	ete	🕅 Workflow -	Select Actions 👻 📲 🛛	Reports 👻 🙋 Mail Me	rge 🕶 💮 More 🕶				
	0	Project Fund ID		Fund Source Name	Fund Source Code	Fund Source Type	Fund Description	Account Number	Account Priority	Workflow Status	
			T			T		T			T
		PFL-4		CON04	CON04	CON	15FCA 14(4) Funding	15A7302501404 R40.C		Approved	
		PFL-3	:	CON03	CON03	CON	FLAP Funding MT NPS GLACIER	1517303700141 540.C		Approved	
		PFL 2		CON02	CON02	CON	FLAP Funding MT NPS GLAC 14	1517302601404 540.C	CON02 CON04	Approved	17

Figure 130:Selecting a Record

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

PROJECT FUND LIST									
	9	Project Fund ID	A Arrachments	Fund Source Code	Fund Source Type	Fund Description	Account Number	Account Priority	Workflow Status
			39 Accounteres	<b>T</b>	<b>T</b>		T		
		PFL 4	CON04	CON04	CON	15F0A 14(4) Funding	15A7302601404 R40.C		Approved
		PFL-3	CON03	CON03	CON	FLAP Funding MT NPS GLACIER	1517303700141 540.C		Approved
		PFL 2	CON02	CON02	CON	FLAP Funding MT NPS GLAC 14	1517302601404 540.C	CON02 CON04	Approved
		PFL-1	CON01	CON01	CON	FLTP Funding MT NPS GLAC 14(	1517302601404 540.C	CON01-CON02-CON04	Approved

Figure 131: Multiple Records with Same Status

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

PROJECT FUND LIST	
🏵 Cancel 📑 Workflow 👻 📽	Select Actions 🔻
Project Fund ID	: PFL-4
Fund Source Name	*: CON04
Fund Source Code	: CON04
Fund Source Type	: CON
Fund Source Category	: GAOA
Fund Description	: 15F0A 14(4) Funding
Account Number	: 15A7302601404 R40.CN.15F0.30 1730001426 25255
Account Priority	1211
Authorized Amount (\$)	: 0.01
Original Authorized Amount (\$)	: 0.01
Expended Amount (\$)	: 0.00
Probable Expenditure (\$)	: 0.00
Remaining Amount (\$)	: 0.01
Notes	:

Figure 132: Editing a Record

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

PROJECT FUND LIST	
🕄 Cancel 📑 Workflow 👻 🙄	Select Actions 🔻
Project Fun <sup>Re</sup> Fund Source N	eturn to Published lark as Inactive
Fund Source Code	: CON04
Fund Source Type	: CON
Fund Source Category	: GAOA
Fund Description	: 15F0A 14(4) Funding
Account Number	: 15A7302601404 R40.CN.15F0.30 1730001426 25255
Account Priority	:
Authorized Amount (\$)	: 0.01
Original Authorized Amount (\$)	: 0.01
Expended Amount (\$)	: 0.00
Probable Expenditure (\$)	: 0.00
Remaining Amount (\$)	: 0.01
Notes	:
	li 🔻

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.

MasterWorks				×
Notes	· Validated th	ne information added for	the fields.	11
Set Days To Complete for Next Stage	: 2		0	
ATTACHMENTS				
Ū				
File View Status Docume	nt Name	Title	Uploaded By	Uploaded Date File Size
No Attachments available				
Upload Document				
			ОК	Cancel

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.
- 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.

MasterWorks					×		
Set Days To Complete for Ne	Notes : Validated to	he information added for	the fields.	4			
ATTACHMENTS							
Ē							
File View Status	Document Name	Title	Uploaded By	Uploaded Date	File Size		
No Attachments available							
No Attachments available							

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 <u>Section 4.1. Attachments</u>. You can access these documents from the Workflow History dialog box. For more information, refer to <u>Section 4.3.2. Viewing the Workflow History</u>.

## 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.

PR	PROJECT FUND LIST								
_0	Edit	💿 View 🔟 Delete	🛃 Workflow 👻 背	Select Actions 👻 📓	Reports 👻 👩 Mail Mer	rge 🕶 💮 More 🕶			
	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description			
		T	Т	T	T	T			
		PFL-4	CON04	CON04	CON	15F0A 14(4) Funding			
		PFL-3	CON03	CON03	CON	FLAP Funding MT NPS GLACIER			
		PFL-2	CON02	CON02	CON	FLAP Funding MT NPS GLAC 14			

Figure 136: Selecting a Record

2. Click Workflow, and then click History.

PR	ојест	FUND LIST		
_0	Edit	📀 View 🔟 Delete	💽 Workflow 👻	🕻 Select Actions 👻 🕌 🖡
	9	Project Fund ID	History	nd Source Code
		PFL-4		N04
		PFL-3	CON03	CON03

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.
#### Federal Highway Administration

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

Workflow Status & H	istory		×					
Workflow Status			Hide 🔺					
Selected Status Current Status								
Published     Approve								
Workflow History			Hide 🔨					
Workflow Status :	Published	Workflow Status :	Approved					
Received On :	07-26-2023 7:34:08 AM	Received On :	07-27-2023 5:32:06 AM					
Action :	Approve	Action :						
Action Notes :		Action Notes :						
Action By :	Mike Ross	Action By :						
Due Date :	07-26-2023 7:34:08 AM	Due Date :	07-27-2023 5:32:06 AM					
Action Status :	Action Completed	Action Status :	Action Pending					
	More Details	Cancel						

Figure 139: More Details option

## The **History** page is displayed.

HISTORY						
() Close						
Record Ideni	ifier : PFL-4/CON04					
Workflow	Status					Hide 🔨
Draft Publish	Selected Status	Current Status	•	Approved	• inactive	• End Stage
Workflow	History					Hide ^
		Action Pending	📕 Action Completed 📕	Action Failed 📃 Workflow	Completed	
0 State	JS	Received On	Action	Action Notes	Action On	Action By
		iii 6 🔽		7	10 T	
Draf	L	07-26-2023 7:34 AM	Publish		07-26-2023 7:34 AM	User10
			Figure 140: His	tory 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.

HIST	TORY							
3	Close							
Recor	d Identifier : PFL-4/CON04							
	rkflow Status							Hide ^
	Selected Status	Current Status						
• Dr Pu	att	Published Approve		Approved	<ul> <li>Inactive</li> </ul>	End Stage		
+								×
Wor	kflow History							Hide 🔺
			Action Pending 📃 Acti	on Completed 📕 Action F	ailed 📕 Workflow Comple	ted		
9	Status	Received On	Action	Action Notes	Action On	Action By	Action By User Name	Action Mes
	Approved	i 0 T	T	T	to T	Υ		
	Approved	11/21/2023 B:37 AM						
$ \mathbf{T} $								•
				Show Workflow History Rep	ort			

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.

HIST	ORY						
я) с	lose						
	Draft	07-26-2023 7:34 AM	Publish		07-2	6-2023 7:34 AM	User10
0	Published	07-26-2023 7:34 AM	Approve		07-2	7-2023 5:32 AM	Mike@01
	Approved	07-27-2023 5:32 AM					
4 @				)			Þ
			Show We	orkflow History Repo	ort		
ATTA	ACHMENTS						
ø	*						
~	File View Status	Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size
		Fund Management in FHWA.docx	NA		Mike Ross	07-27-2023 5:32	AM 12.77KB

Figure 142: Clicking Document Name



#### The document is opened in the application viewer.

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

IISTO	DRY						
) cl	ose						
	Draft	07-26-2023 7:34 AM	Publish		07-26	-2023 7:34 AM Use	-10
0	Published	07-26-2023 7:34 AM	Approve		07-27	-2023 5:32 AM Mik	:@01
	Approved	07-27-2023 5:32 AM					
4 📾							Þ
ATTA	CHMENTS		Show Wo	orkflow History Repo	prt		
	Ľ						
~	File View Status	Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Siz
		Fund Management in FHWA.docx	NA		Mike Ross	07-27-2023 5:32 AM	12.77K

Figure 144: Using Show Workflow History Report Option

## The **Workflow History Report** is displayed.

WORKFLO	W HISTORY	REPORT							
Back	D Subs	cribe							
∢ ∢ [1	of 1 🕨	)		Find   Next	<b>.</b> •	•	đ		
			Workflo	ow Histo	ory Re	port			
Record	Name:	Project Fu	nd List	Record D	etails:	Fund	Source Na	me	
Project	Project Code: Aurigo SIT GLAC 14(4 GLACIER 1		MT NPS ) & MT NPS 4(1) - RKR	Project Name:		Aurigo Glacie Road	Aurigo - Test Rehabilitate Many Glacier Road & Many Glacier Road		
Status	Status Pending On Role(s)		Received On	Action	Action User Name		Action On	Due Date Override	
Draft	A/E De Lead Design Manag ions,Ac or,Con Admin Staff,Co n Com Lead,D Compo Lead,D oject N	signer,A/E er,A/E er,Acquisit dministrat struction onstructio ponent esign onent esigner,Pr lanager	12/11/202 3 2:28 AM	Publish	Admir or	histrat	12/11/20 23 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.

Workflow User(s)				×
Available Workflows :	Select	٠		
Note: '*' indicates the stage has an action	Select		he action to move the workflow to next stage	
	Custom Project Fund List		1	

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).

PROJECT	FUND LIST			
_Ø Edit	💿 View 🔟 Delete	Workflow -	📋 Reports 👻 📴 Mail M	lerge 🔹 💮 More 🔹
9	Project Fund ID	History	nd Source Code	Fund Source Type
	PFL-2		)N02	CON
	PFL-1	CON01	CON01	CON

Figure 148: Using Workflow User(s) Option

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

Workflow User(s)						×
Workflow assigned	ed for r	ecord : Custom Proje	ect Fund List			
		Stage	Role	User Name	First Name	Last Name
			T		T	
✓ Stage	: Inact	ive				Î
~	Role:	Acquisitions				
		Inactive	Acquisitions	Rama_Acquisitions	Rama	
		Inactive	Acquisitions	Ryanp_Acquisitions	Ryan	Phillips
		Inactive	Acquisitions	Shirley_Acquisitions	Shirley	Anderson
		Inactive	Acquisitions	Dean_Acquisitions	Dean	Umathum
		Inactive	Acquisitions	Antony	Antony	
4	-					
	2 3	4 5 🕨 🕅				Page 1 of 5
Note: '*' indicates the stage	e has an	action which requires every se	elected user to complete the a	action to move the workflow t	o next stage	

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.

Workflow User(s)					×
Workflow assigned for	record : Custom Proj	ect Fund List			
	Stage	Role	User Name	First Name	Last Name
	Approved	Administrator	T	T	T
✓ Stage: App	roved				<b>^</b>
✓ Role	: Administrator (Show	ving 10 of 40 items. (	Group continues on t	he next page.)	
	Approved	Administrator	Administrator	Administrator	
	Approved	Administrator	shreyash	shreyash	N
	Approved	Administrator	kishor	Kishor	E
	Approved	Administrator	Mahesh	Mahesh	Panda
	Approved	Administrator	Ramadevi	Ramadevi	
	Approved	Administrator	Rama_Administrat	Rama	
	Approved	Administrator	Beale_Administrat	Beale	Spencer
4					•••
	4 5 6 7	8			Page 1 of 8
Note: '*' indicates the stage has an	action which requires every s	elected user to complete the	action to move the workflow t	o next stage	

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.

C A	ederal Highway Idministration							
	PROJECTS		PR	OJECT	FUNDLIST			
٩,	C Type to Search X V 🔨			♪ New 🕅 Workflow - 🗎 Reports - Èt Excel Export - ⊙ More				More 💌
	SIT - TRINITY COUNTY HBP BRIDGES	•		0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type
蕌	General Quick A	lccess			T		Ţ	T
008				PFL-2	CON02	CON02	CON	
		000			PFL-1	CON01	CON01	CON
٢	+ Documents							
	Document Search							
	<ul> <li>Project Report Gallery</li> </ul>							
	<ul> <li>Project Calendar</li> </ul>							
	🗕 Fund Management							
	Project Fund List	Ś						

Figure 151: Selecting a Form

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



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

Workflow Association			×
DEFAULT WORKFLOW :			
Custom Project Fund List			
WORKFLOW OVERRIDE FO	R THIS PAGE :		
No Workflow Associated			
APPLY A NEW WORKFLOW	FOR THIS LIS	TPAGE AND MOD	ULE :
Select	~	Apply	
Figure 153: Workflo	ow 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.

Workflow Association			×
DEFAULT WORKFLOW :			
Custom Project Fund List			
WORKFLOW OVERRIDE F	OR THIS PAGE :		
FHWAProject_WF	Remove		
APPLY A NEW WORKFLO	W FOR THIS LIST	PAGE AND M	ODULE :
Select	~	Apply	

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.

Workflow Association			×
DEFAULT WORKFLOW :			
Custom Project Fund List			
WORKFLOW OVERRIDE FO	R THIS PAGE :		
FHWAProject_WF	Remove		
APPLY A NEW WORKFLOW	FOR THIS LIST	PAGE AND M	ODULE :
Select	~	Apply	

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.