Lettings

This document provides information about the Lettings portion of web Preconstruction, (PrP) including tasks, processes and activities—whether seen or hidden. The user's role along with workflow and phase determine what can be viewed and the actions that can be taken.

Quick Links to access subjects within this document Include:

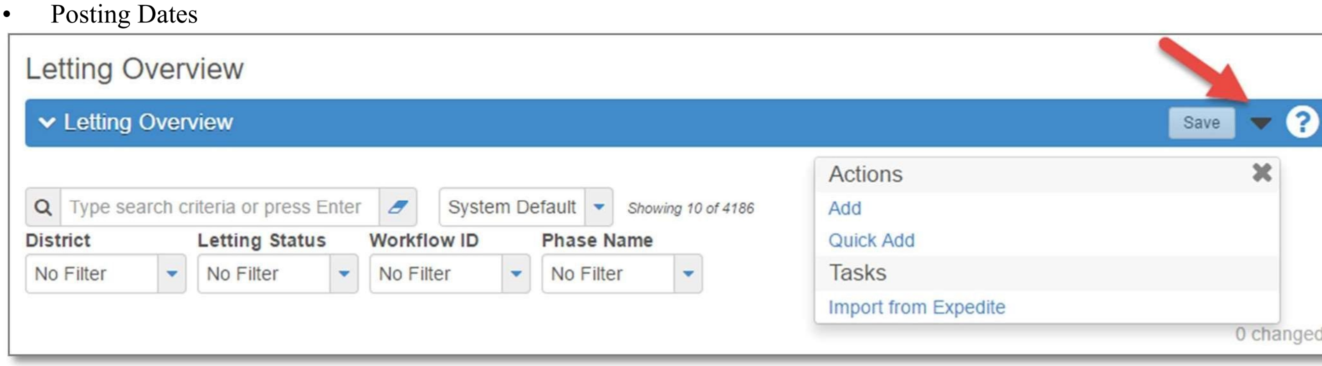
- Lettings and Proposals
- Letting Workflow and Phases
- Letting Proposals
- Working Outside of Preconstruction
- Addenda
- Special Purpose Bid Entry
- Re-Letting

Florida Department of Transportation (FDOT) receives bids for competitively bid proposals at a bid letting. The time and place of the bid letting is published in the letting's Bid Solicitation Notice(s), (Notice to Contractors). Lettings are held on a scheduled basis, and bidders, their authorized agents, and other interested parties are invited to be present.

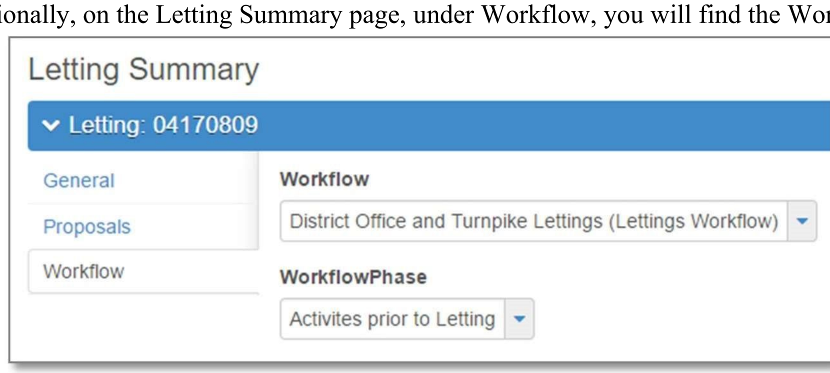
Lettings and Proposals

Before the bid letting takes place, a bid letting row must be created in the system to manage all information associated with the letting. Some of the information available via a bid letting row includes:

- Letting ID
- District
- Letting Status
- Letting Date and Time
- Posting Dates



Additionally, on the Letting Summary page, under Workflow, you will find the Workflow and "WorkflowPhase".

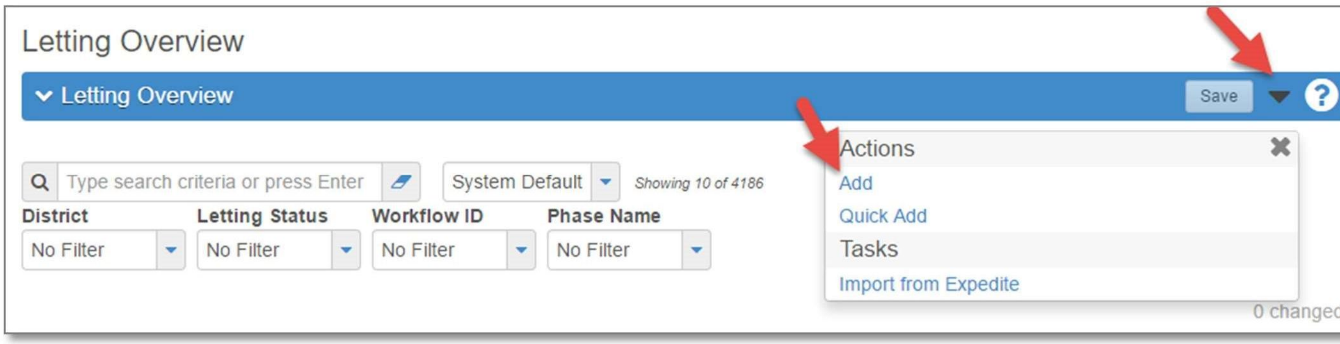


Note: Only Workflows containing the word "Lettings" are used for Lettings.
Note: Please see the Training Documents addressing MMOAs for all information pertaining to Maintenance Resident Yard/Operation Center handling of this specific type of contract.

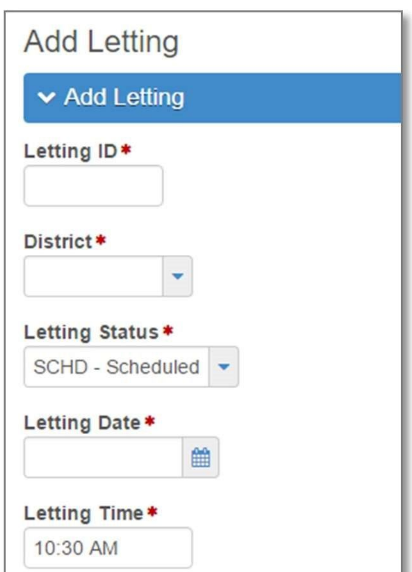
Lettings

The Letting Overview component is the gateway to managing all information in a bid letting. This includes proposals associated to the letting, their statuses, number of addenda, bidders and their bids that have been submitted for those proposals can also be accessed. To access the Letting Overview component, click the “Lettings” link in the Preconstruction Component.

To add a single Letting, select Add using the Action button at the end of the Component bar as shown.



Complete the information in the fields below. Change the Letting Time, (if necessary); however, the Letting Status is always going to be “SCHD – Scheduled” at the beginning of the process.



Note: Please note the red asterisk (*) that denotes required fields. The system will not save data if a required field is blank.

Lettings

Letting ID is a unique identifier for a specific letting and shall follow the naming convention below:

Central Contracts Office Lettings — (CTYYMMDD) the first two spaces are “CT”, the next two digits “YY” denote the year, the next two “MM” indicate the month, and the last two “DD” reference the day. (Example: CT171225).

District Office Contracts Office Lettings — (DDYYMMDD) the first two spaces are the district “DD", the next two digits “YY” denote the year, the next two “MM” indicate the month, and the last two “DD” reference the day. (Example: 01171231).

Letting Date can be selected using that field’s calendar.

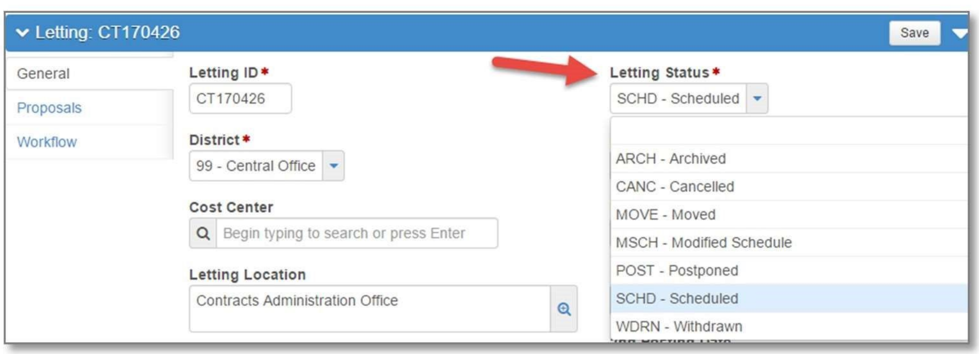
Change the Letting Time if necessary but the Letting Status is always going to be “SCHD Scheduled” at the beginning of the process.

When data has been entered, click the “Save” button and the system will display a message to confirm that your changes were saved.

The Letting Statuses typically used by the department include:

- Scheduled (SCHD) - The Letting has been created with a future date and time identified.
- Move (Move) – The Letting’s originally scheduled date and time have been changed.
- Archived (ARCH) – All activity associated with the Letting has been completed.
- Cancelled (CANC) – The department has determined prior to the scheduled date/time the Letting will not be held. If all proposals for a Scheduled Letting have been removed or moved to another Letting its status must be changed to **Cancelled**.

Questions about Letting Status should be directed to the Central Office Contracts Administration Office.



Letting Workflow and Phases

The next step is to set the Letting’s Workflow and “WorkflowPhase”:

The Letting Workflow choices are either “Central Office Lettings" or “District Office or Turnpike Lettings", and the initial phase description is always “Activities prior to the Letting.”

Lettings

When the message “There are unsaved changes" appears, click the “Save” button.

Note: Never use a Workflow for a Letting that does not have the word “Lettings.”

Workflow and “WorkflowPhase”:

A Workflow is a set of relationships between tasks and the order in which those tasks are performed throughout the lifecycle of an agency project, proposal, or contract or in this instance a letting. Regardless of the Contract Type of the Proposal(s) attached to a Letting one should never use a Workflow that does not have the word “Letting” for a Letting’s Workflow.

A “WorkflowPhase” within a Workflow can be considered a required step to move the agency project, proposal, contract or letting towards its desired result. Several activities may occur within a “WorkflowPhase”. The “WorkflowPhase” are as follows:

- Pre-Letting — Activities prior to the Letting
- Letting — Receive Bids
- Post-Letting — Activities following receipt of Bids
- Closed — Letting has occurred
- Historical — Letting Archived; all preconstruction activity has been completed including transfers to DSS and Site Manager

It should be noted that the Phase Description (See Bolded Text Above) is what appears in the Phase dropdown list.

Once the Letting has been given the “WorkflowPhase” Activities prior to the Letting”, the Posting Dates should be added to the Letting General Screen. These are the dates the department will publicly declare its intent on Proposals within the Letting (either Award to a Bidder or All Bids Rejected).

While the District Field is required, the Cost Center Field can be used for Lettings associated with MMOAs.

If none of the Proposals attached to a Letting have been advertised — that Letting can be edited by the following steps:

- Open the Letting via the Letting Overview Page.
- Open from the Actions menu on the Letting’s row.

Lettings

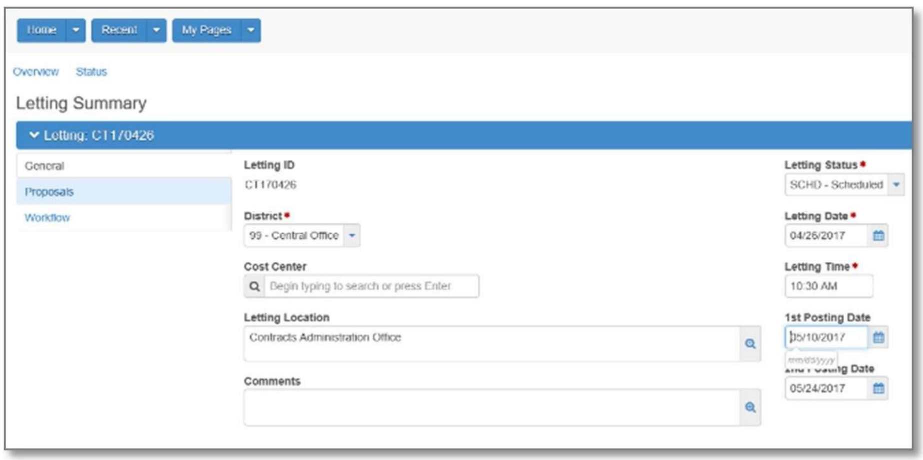
- The Letting Summary component opens on the General tab, which allows view or change of information in these fields:
  - Letting Date
  - Letting Time
  - Letting Status
  - Location
  - Comments
- Click in a field to add, change, or delete information as needed. When you are finished making changes, click the Save button. The system displays a message to confirm that your changes were saved in the database.

> Note: See Role Help "Moving Proposals to Another Letting" for steps to move an "Advertised Proposal".

Letting Proposals

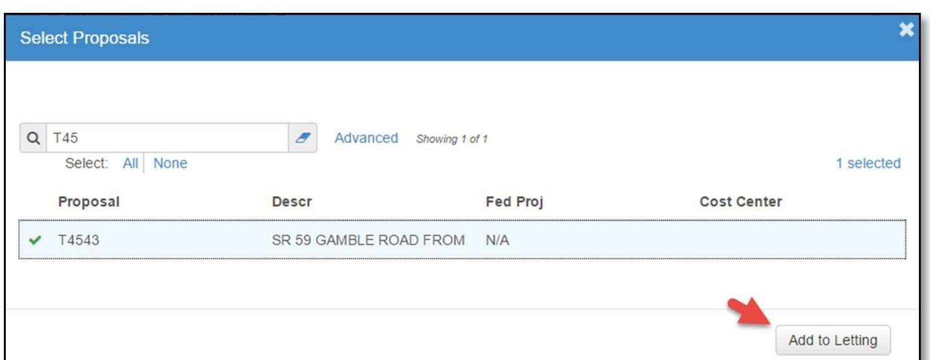
To add one or more proposals to a bid letting, perform the following steps:

1. Click the Proposals tab on the Letting Summary



2. Click the Select Proposals button

3. The system displays a modal window for selecting proposals.



4. Type Criteria in the Quick Find search box that matches the Proposal you want to add or click "Show first 10". The system lists all proposals that meet your search criteria and are not currently attached to a Letting. Click each proposal you want to attach to the Letting, (note the Green Checkmark beside each selected proposal). To clear a selection click the proposal again.

5. Click "Add to Letting" and then the "Save" button.

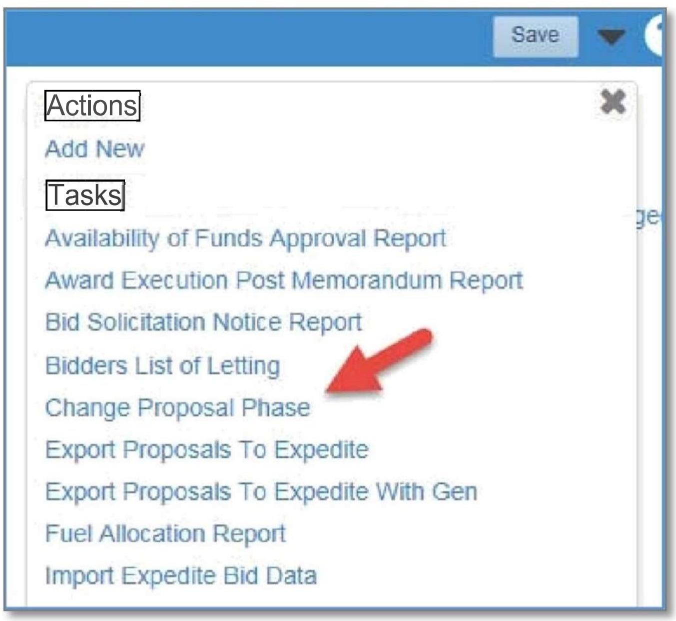
The system closes the modal window and takes Proposals tab of the Letting Summary with the new proposals added to the list.

CAO Staff MUST PERFORM the "Auto Generate Sections" and "Assign Items to Sections" processes after attaching any Proposals to a Letting before commencing with any further steps such as generating a "Notice to Contractors (BSN)" or performing the "Export Proposal to Bids" process. This is critical-because omitting this step runs a risk that proposal level data not match the project level data.

Refer to the Role Help "Generate Sections and Assign Items to Sections"

After those steps are completed Proposals attached to a Letting should then be given the "WorkflowPhase" Advertised."

This can be done individually or by Groups (District Let Maintenance Contracts or District Let Construction Contracts) by accessing that feature from the Letting Actions button.



This feature can also be used when there are groups of Proposals with the same Phase change happening concurrently, (example: "Bids Received.")

Once the Advertised Phase is assigned, the Proposals' Item Line Numbers are fixed by the System. After this, any updates or changes must be done by Addendum.

Additionally. the Proposals placed in the Advertised Phase must have the "Proposal Letting Status" field populated with the "00-Advertised" selection from the field's drop-down selections as well selecting the appropriate date in the "Status Date" field.

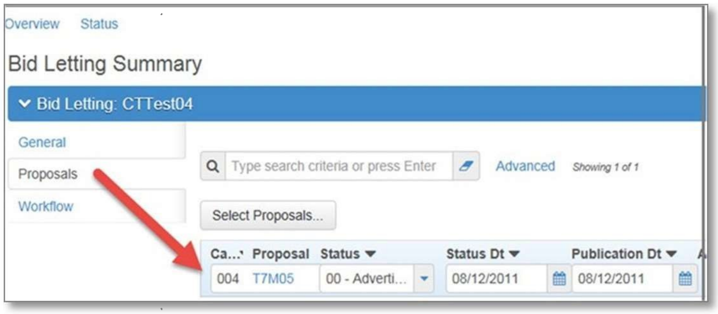
When all the Proposals have been attached to a Letting to be included in the first advertisement, they will be assigned Call Order Numbers by the application when all changes are saved. This number sequence will not be modified once the advertisement is published. Call Order Numbers are unique three-digit sequential numbers used to order Proposals within a Letting. Proposals in subsequent advertisements for the Letting will be assigned Call Order Numbers commencing immediately after the last previously assigned Call Order Number within that Letting.

Lettings

The “Proposals" tab on the Letting Summary contains a rolling list of all the proposals currently associated with the bid letting. Each row contains an Actions button, the number of addenda, and current values for the following fields:

- Call — Letting Call Order Number
- Proposal — Proposal Identifier Number which is a “Quick Link" to access more information.
- Prop Stat — Current Status of the Proposal, (examples: Advertised, Addenda, Awarded Executed, etc.). The Status and Status Date information populates the same fields on the Proposal General screen when saved. * Publication Date — Appears on the Notice to Contractors, (BSN) which will include the Proposal

To access more information about a proposal, click the Proposal link in the appropriate row.

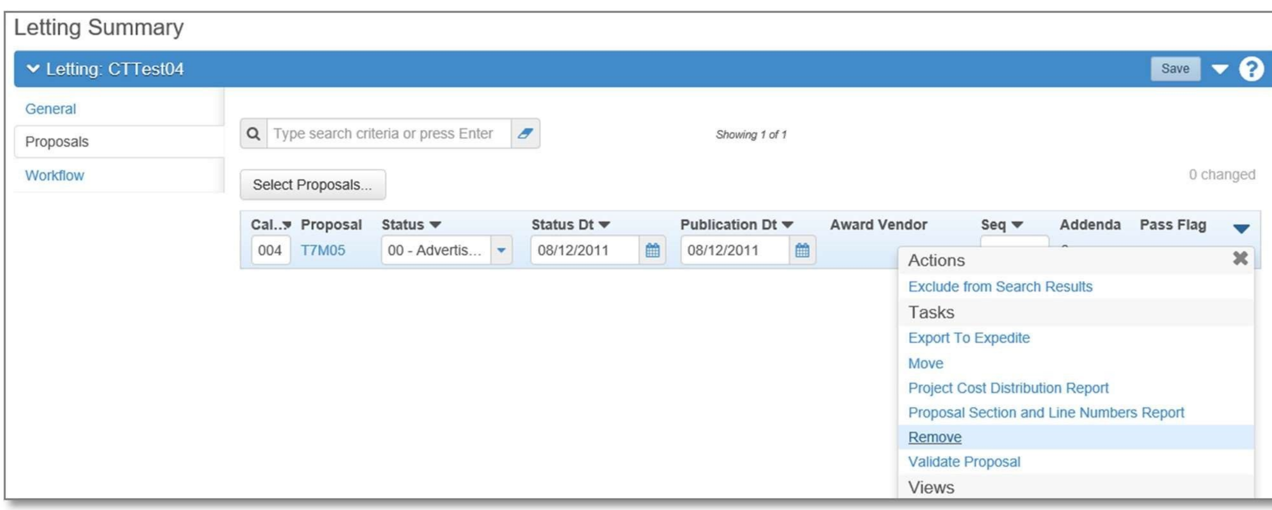


It should be noted that the requirements for a Proposal to be published on the Bid Question and Answer Site are:

- Attached to a Scheduled Letting in the Letting Phase “Activities prior to the Letting”
- The Proposal’s Phase must be “Advertised”
- The Proposal’s Letting Status must be “Advertised” with the Status Date field showing yesterday’s date or earlier.
- The Publication Date’s field must show yesterday’s date or earlier.

A proposal can be removed from a Letting that has not occurred. Check with the Central Contracts Administration Office if the proposal has already been advertised prior to commencing.

To remove a proposal, select Remove from the Actions menu on the Proposal’s row.



WORKING OUTSIDE OF PRECONSTRUCTION

Once the proposal item details are finalized, they can be transferred to Bids in a comma-separated value file.

The Contracts Office will fill orders for Bidding Documents associated with Advertised Proposals utilizing the Contract Proposal Processing Application (CPP), Bidding Documents including the Plans, Specifications Packages and the Bid Proposal. Once CPP approves the Proposal issuance, the system automatically makes the Vendor "Valid for Bidding."

At this point, it becomes necessary to address a couple of tasks that are done outside wt. Preconstruction. These involve:

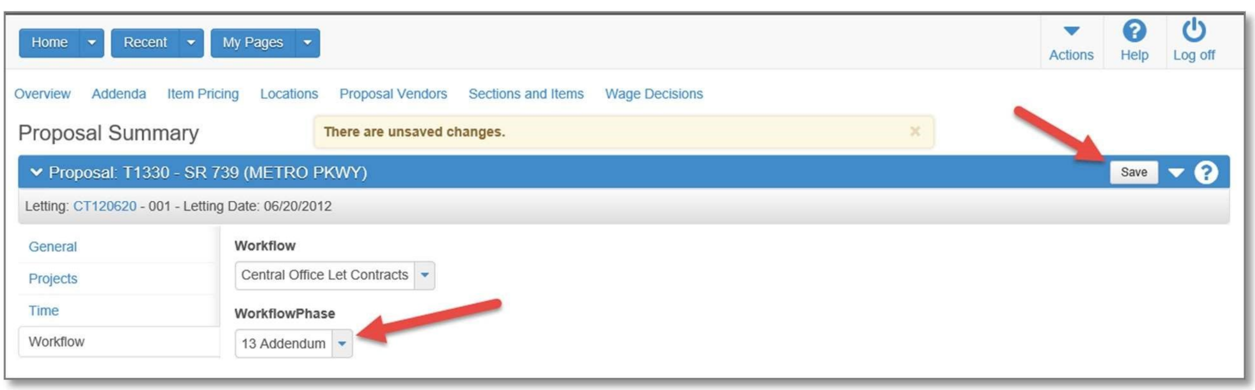
Export Proposal to **Bids**
CPP Online Ordering system.

Instructions on how to export the proposal to Bids can be found on the HOME Page of PrP. Click on the link for steps to transfer to Bids. Refer to the "CPP Manual" available on the "Instruction Guides" section of the Contracts Administration Infonet site for information about that Application.

Addenda

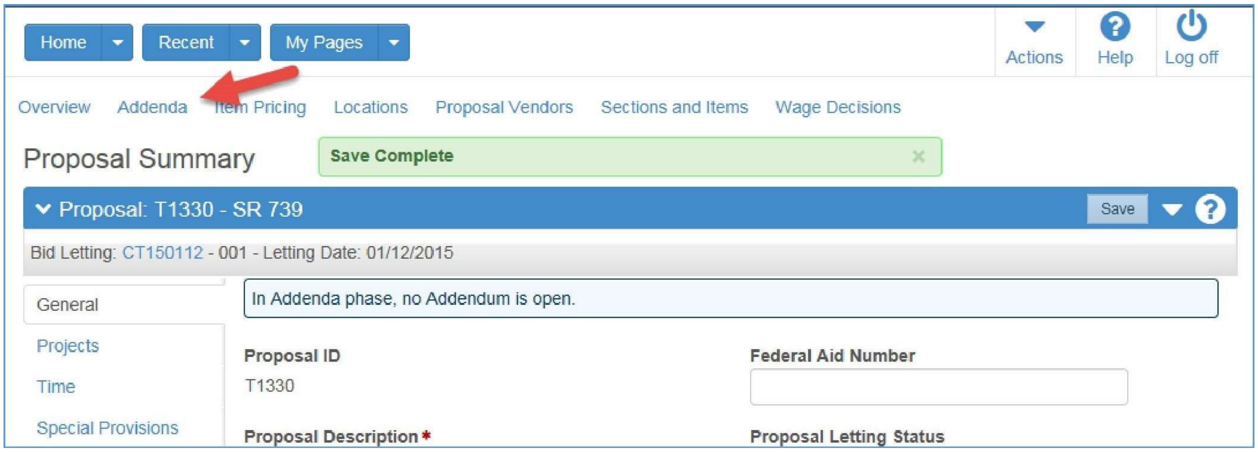
After a proposal has been advertised, subsequent changes to proposal information that effect contractors' bidding (such as contract time, items, or special provisions) must be tracked and distributed to the proposal holders. This is accomplished by adding an Addendum to the proposal. An Addendum allows modifications directly into the system to the proposal information before the bid letting. The addendum must be provided to plan holders as soon as possible so they can incorporate the changes into their bids as well as acknowledge the receipt of the addenda.

Before an addendum can be added to a proposal, the proposal must be in the Addendum "WorkflowPhase". This means that the proposal has been set to a phase called Addendum. You can set the phase on the Workflow tab of the Proposal Summary and then click the Save button.

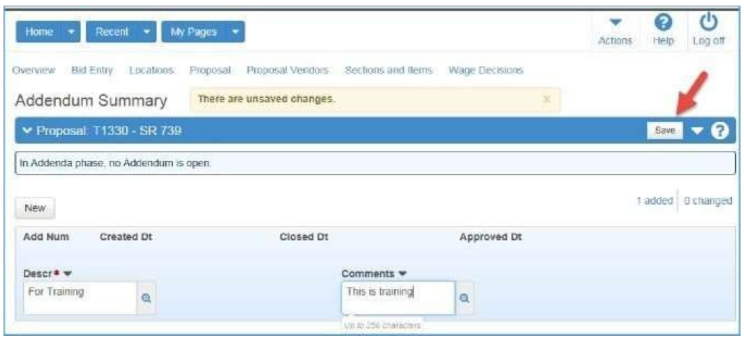


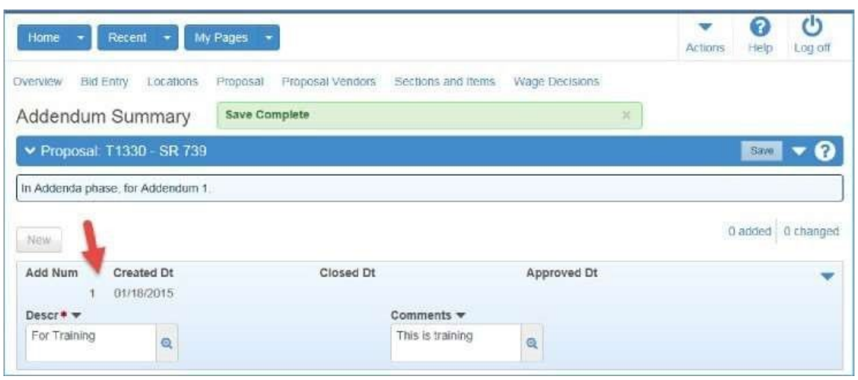
To create an Addendum record:

Click Addenda.



Then Click Save.

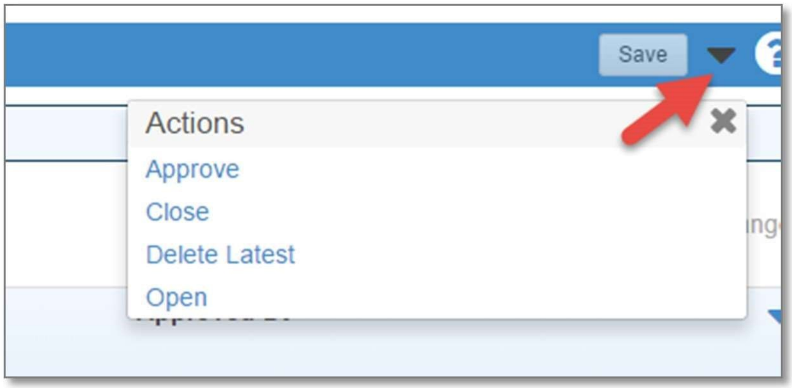




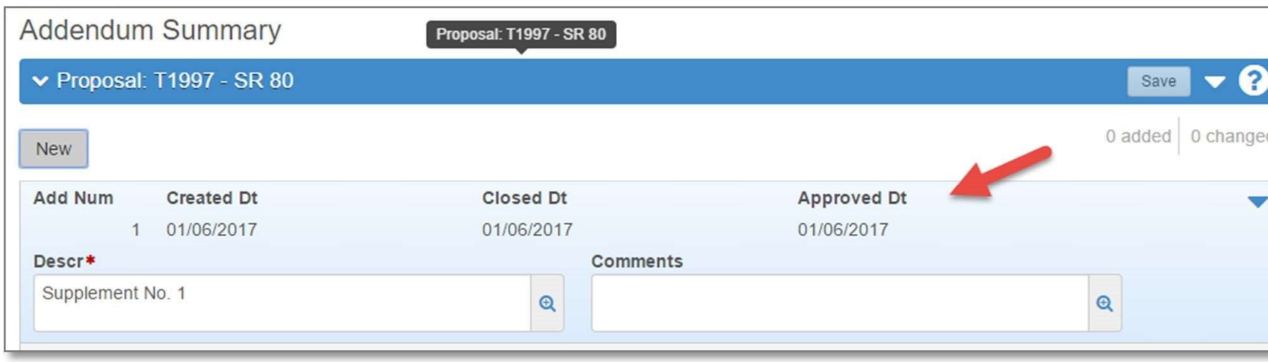
Note: After the Save completes, the Application assigns ADD Num. and Created Dt.

Once the proposal is in the Addendum Phase and you have added an addendum, the system makes a virtual copy (called a snapshot) of the proposal, and keeps that copy as a record of the proposal before any addenda changes are made. At this point, you can make changes to the proposal.

When you are finished entering all the changes pertaining to a given addendum, the addendum should be Closed and then Approved by clicking the appropriate link.

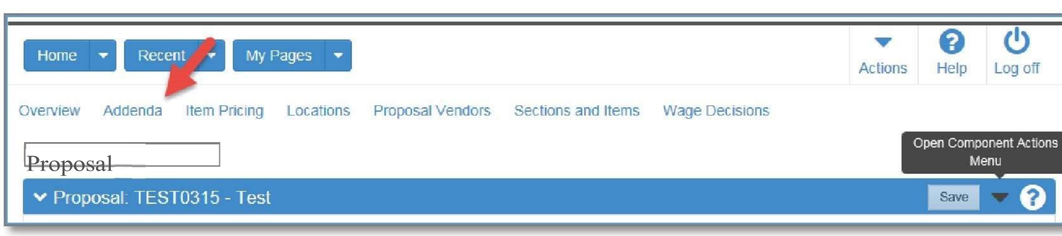


Note the dates that are System Supplied when each step is accomplished. Once approved, an addendum cannot be reopened or changed.



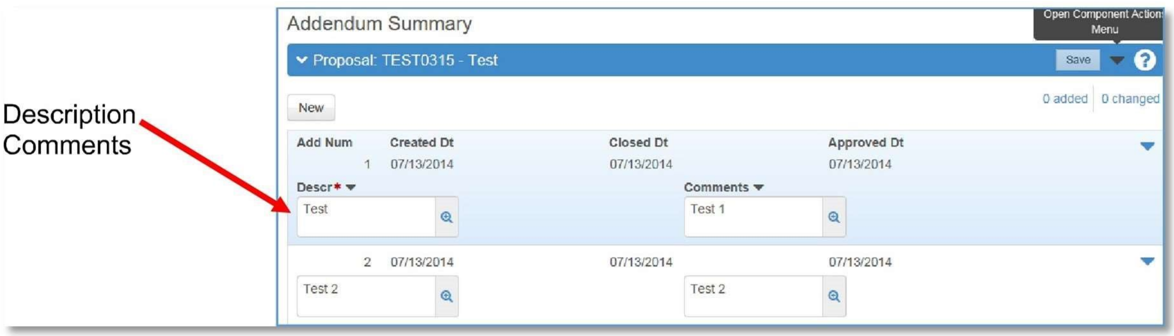
If a new addendum is added by clicking the “New" button, the system takes another snapshot of the proposal. All changes to the proposal that were made in between the two snapshots are recorded automatically and associated with the previous addendum. This process repeats each time a new addendum is added to the proposal, enabling all changes made to a proposal in the addenda phase to be linked to a specific addendum.

The Addendum Summary component contains a rolling list of all the addenda currently recorded for the proposal. To access the Addendum Summary component, click the Addenda Quick Link on the Proposal Summary page.



Each row represents one addendum. You can view information about any addendum in the list but you can only change information in the most recent addendum. If the most recent addendum has been approved, you cannot change any information in the record.

To view or maintain an addendum record, click anywhere in the addendum’s row. The system highlights the row in blue and displays information in labeled fields. Prior to Approval you can view or change information in these fields:



When you are finished making changes to the addendum, click the Save button. The system displays a message to confirm that your changes were saved in the database.

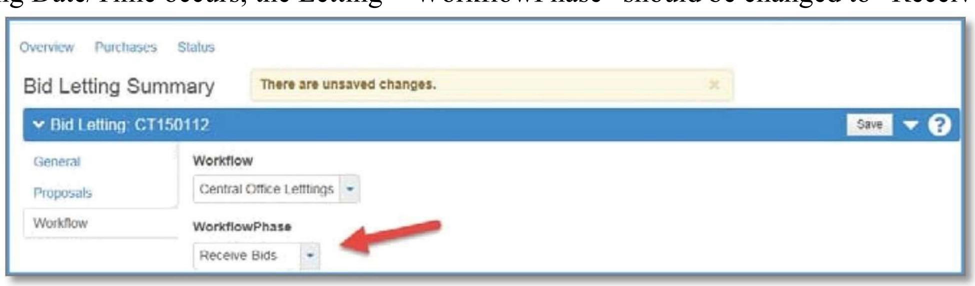
Several business rules apply to adding addenda to a proposal:

- You cannot add an addendum unless the proposal has been set to the correct phase. The “WorkflowPhase” must be set to Addendum before details regarding the addendum can be entered.
- After the first addendum has been added, you can only add subsequent addenda, if all previous addenda have been approved.

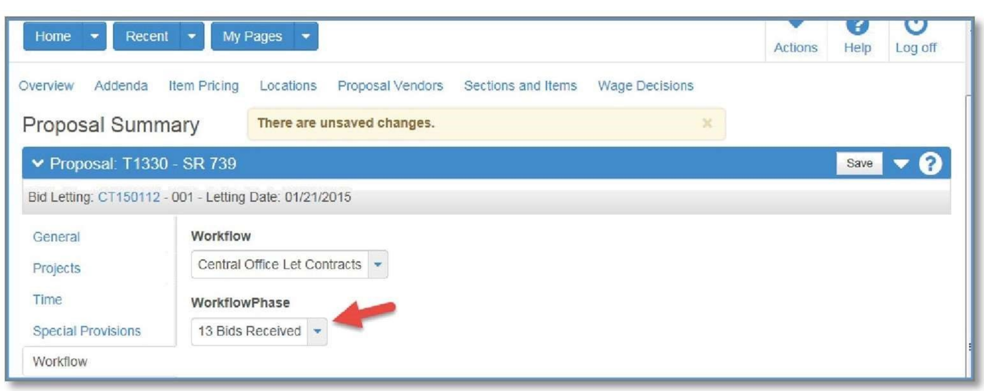
Note: If a new Addendum is necessary follow the process to open the Addendum Summary and click the New Button.

Letting Date/Time

When the Scheduled Letting Date/Time occurs, the Letting’ “WorkflowPhase” should be changed to “Receive Bids”.



All the Proposals’ “WorkflowPhase” should be changed to “Bids Received."
NOTE: This is an opportunity to use the Group Phase Change feature discussed earlier.



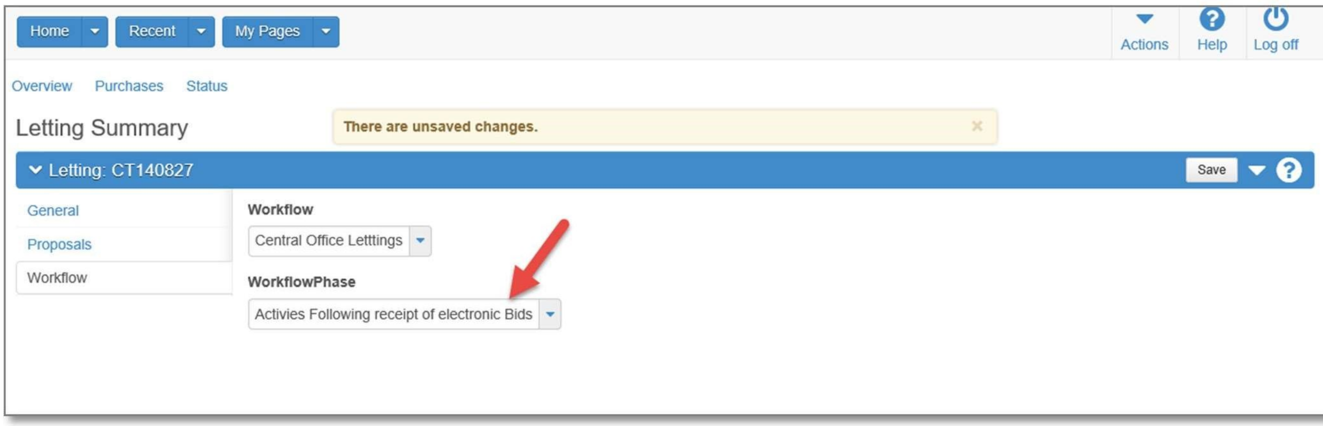
Lettings

The bids for the Advertised Proposals that have been electronically submitted can then be downloaded via Import Bids Data process to Preconstruction or manually entered.

Note: Interfaces such as Bid Express Load Bids are addressed in other materials.

Post-Letting Activities

When all bids for the Letting's Proposals have been received, the Letting's "WorkflowPhase" should be changed as follows:



Bids are then processed and the Technical Review and Awards Committees will review and provide managerial direction for any identified issues.

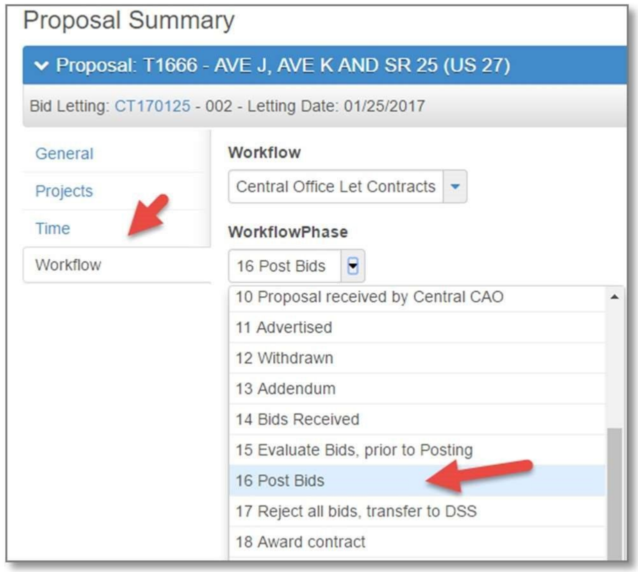
The Bid Tab Analysis/Bid Tab Edit reports are key during this process. Running Bid Tab Edit will determine whether a Bid(s) is Valid and will mark the Bid appropriately.

Note: Ensure the Bid Type and the Bid Status fields are correctly populated for all bidders.

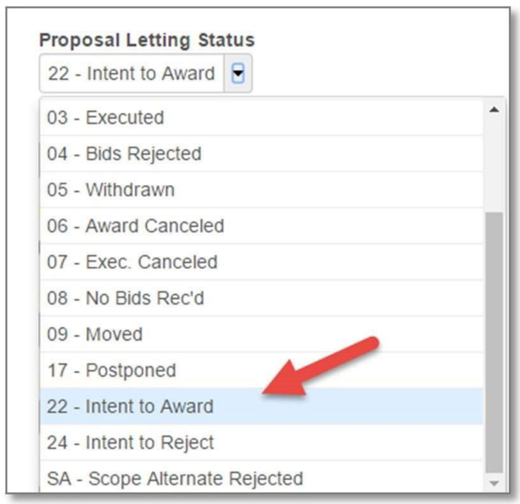
Posting

After the Tech/Award Committee Meetings, the department's public declaration of intent, (to either award a contract or reject all bids on a proposal) regarding a Letting's Proposals occurs. This process is known as Posting and is based upon the requirements of Chapter 120 F.S.

The Proposals that are being posted should be placed in the "WorkflowPhase" Post Bids" and the posting activities should be accomplished.



This includes placing each Proposal when it is being posted in the Correct Status (either "Intent to Award" or "Intent to Reject") and populating the Status Date Field and Posting Date Field with the Posting Date.



The intended actions can be taken after the Posting period concludes if no Administrative Protests are filed.

For additional assistance in related areas, please see the links to Role Help topics below:

Withdraw an Advertised Proposal
Award Proposal Steps
Execute Contract Steps
Reject Bids Steps

Re-Letting

All requests for re-letting are to be made to the Central Contracts Administration Office which will handle the process and advise all affected parties.

The following applies to the Re-Let Process:

The system creates a new proposal that is identical to the proposal being re-let, including its associated projects, with these exceptions:

- It must be assigned a new Proposal ID.
- The Version Number of each associated project is automatically increased by an increment of 1, and the Version Date is set to the current date.

After creating the proposal copy, the system marks the re-let proposal as Rejected in the current bid letting, if necessary.

> Note: Proposals in a "WorkflowPhase" with the Addenda rule cannot be re-let (you can change a proposal's phase on the Proposal details page).

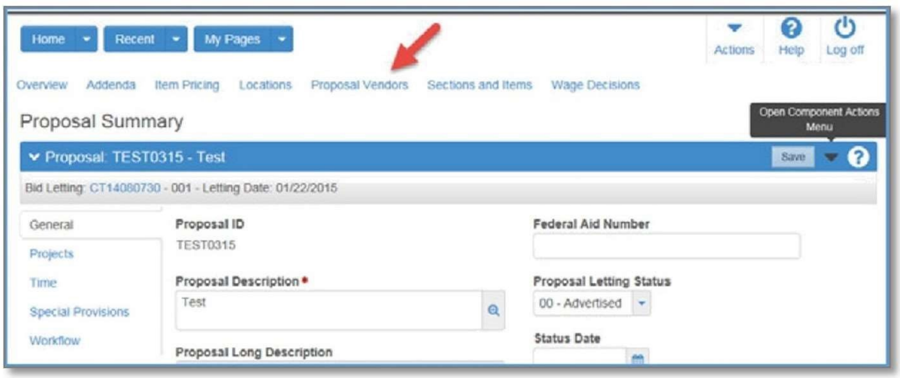
SPECIAL PURPOSE BID ENTRY

To enter bid information for a proposal, select Bid Entry from the Actions menu on the proposal's row. It should be noted the Proposal Holders must have previously been associated to the Proposal.

> Note: This is utilized only if Bid Express or the Bid Load to Preconstruction processes are not used. An example of this is entering the Price Proposal amounts submitted for Design Build.

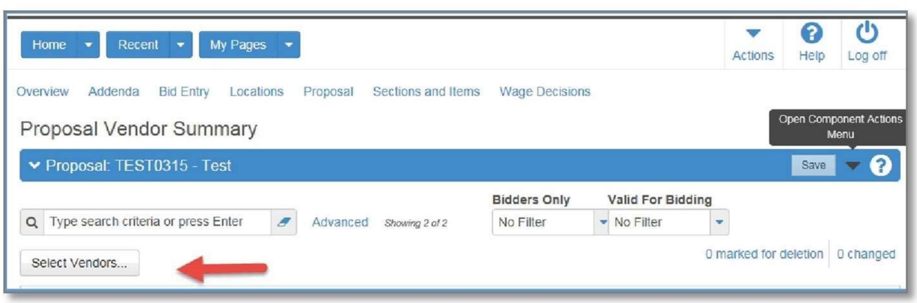
The first step is to add bidders for the proposals in the bid letting following the actions below:

1. From the Proposal General Tab click Proposal Vendors.

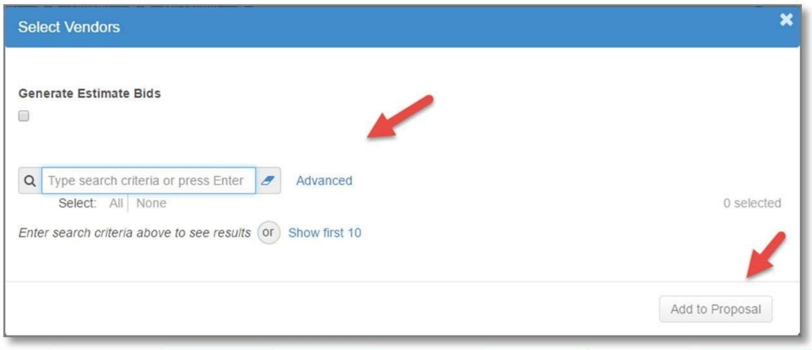


The system displays a modal window for locating and adding reference vendors.

2. Click the Select Vendors button.



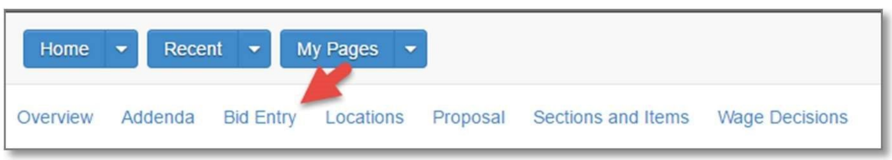
3. In the Select Vendors modal window, first locate the vendor you want to add as a bidder by typing criteria in the Quick Find search box or by clicking Show first 10. The system lists all the vendors that meet your search criteria.



4. Click the row for each vendor you want to add. The system adds a green checkmark beside each vendor record you choose and shades the row blue. To cancel a selection, click the selected row again.

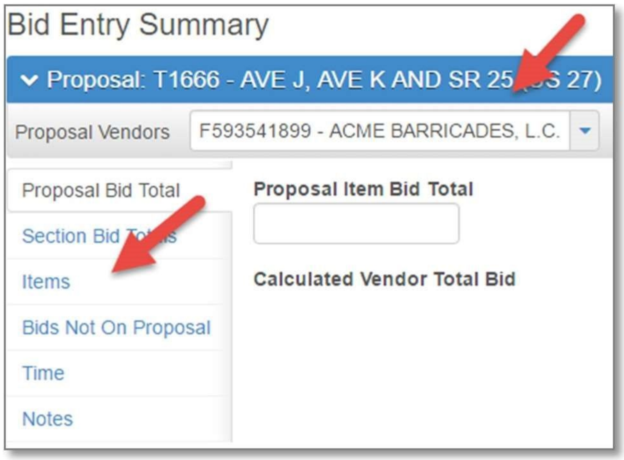
5. Click the Add to Proposal button. The system closes the modal window and takes you to the Bidder/Quote Summary with the new bidders added to the list.

6. To enter bid information for a Vendor associated to a Proposal, place Proposal in the Bids Received Work Flow Phase and then select Bid Entry from the Actions menu on the Proposal's row.



7 . Select the Vendor from the Bid Entry Screen dropdown menu.

8 . Click the Items Tab and enter the Vendor's Bid for each Item's Unit Price and Extended Amount.



9. After this process is complete, verify the Section Bid Total are correct and enter the Proposal Item Bid Total in the field shown above.

10. Follow the standard process steps performed prior to the Tech/Award Committee meeting for the subject letting from this point forward.