

Lettings and Design-Build Proposals

This document provides information about the Lettings portion of web Preconstruction, (PrP) including tasks, processes and activities related to handling Design-Build, (D/B) Proposals.

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](#)

(Place cursor on a line item above, press Control Key and left click cursor)

Florida Department of Transportation (FDOT) receives Design-Build bids/price proposals at the time and place published in the Design Build Ads, (Notices to Contractors/ Consultants) as well as the published “Schedule of Events.”

Lettings

Lettings are held on a scheduled basis, and bidders/proposers, their authorized agents, and other interested parties are invited to be present. D/B Proposals are typically attached to a Letting that does not contain other Contract Types.

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

Letting Overview

▼ Letting Overview

Save ?

Q Type search criteria or press Enter System Default Showing 10 of 4186

District	Letting Status	Workflow ID	Phase Name
No Filter	No Filter	No Filter	No Filter

Actions

- Add
- Quick Add
- Tasks
- Import from Expedite

0 changed

Additionally, on the **Letting Summary** page, you will find the Workflow and Workflow/Phase.

Letting Summary

▼ Letting: 04170809

General

Proposals

Workflow

Workflow

WorkflowPhase

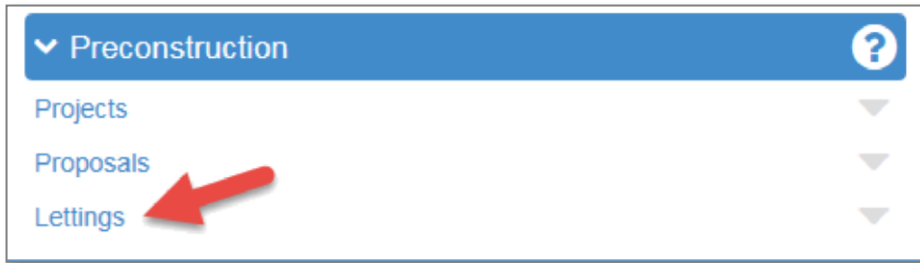
District Office and Turnpike Lettings (Lettings Workflow)

Activites prior to Letting

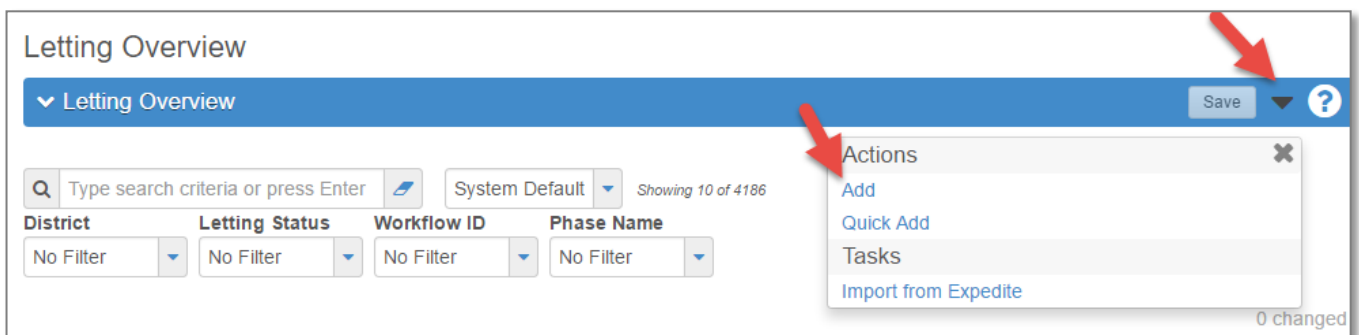
Note: Only Workflows containing the word “Lettings” are used for Lettings containing Design-Build Proposals.

Lettings and Design-Build Proposals

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 or proposers and their submittals 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.

Add Letting

▼ Add Letting

Letting ID *

District *

Letting Status *

Letting Date *

Letting Time *

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

Lettings and Design-Build Proposals

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

Note: Currently Design Build Proposals are handled by the Districts.

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 the field's calendar.

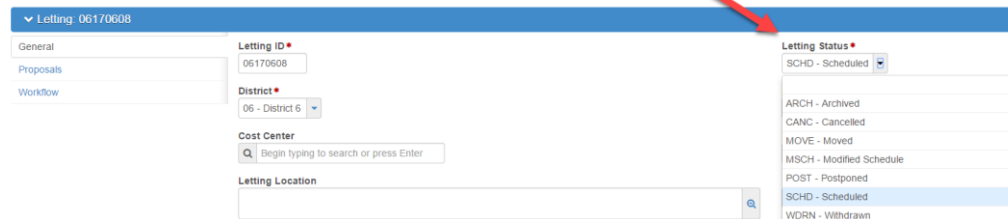
Change the Letting Time if necessary but the Letting Status is always going to be “SCHD Scheduled” at the beginning of the process.

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 a Scheduled Letting has all advertised proposals removed or moved to another Letting – that Letting’s status must be changed to **Cancelled**.

Letting Summary



The screenshot shows the 'Letting Summary' form. A red arrow points to the 'Letting Status' dropdown menu, which is currently set to 'SCHD - Scheduled'. The dropdown menu is open, showing a list of status options: ARCH - Archived, CANC - Cancelled, MOVE - Moved, MSCH - Modified Schedule, POST - Postponed, SCHD - Scheduled (highlighted), and WDRN - Withdrawn. The form also includes fields for Letting ID (06170608), District (06 - District 6), Cost Center (with a search bar), and Letting Location (with a search bar).

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

Lettings and Design-Build Proposals

LETTING WORKFLOW AND PHASES

The next step is to set the Letting's Workflow and Phase:

The **Letting** Workflow choice is "District Office or Turnpike Lettings", and the initial phase description is always "Activities prior to the Letting."

[Overview](#) [Purchases](#) [Status](#)

Letting Summary

▼ Letting: 06170515	
General	Workflow
Proposals	District Office and Turnpike Lettings (Lettings Workflow)
Workflow	WorkflowPhase
	Activities prior to Letting

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 Phase:

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 **never** use a Workflow that does not have the word "**Letting**" for a **Letting's Workflow**.

A **Phase** within a Workflow can be considered a required step to move the agency project, proposal, contract or letting towards its desired final result. Several activities may occur within a Phase. The Phases for the "District Office or Turnpike Lettings" Letting Workflow is 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 of all the Proposals associated to that Letting on "Letting Day."**

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 Workflow Phase "Activities prior to the Letting", the Posting Dates should be added to the Letting General Screen. The department will publicly declare its intent on Proposals within the Letting on one of these dates.

Letting Status *	SCHD - Scheduled
Letting Date *	06/08/2017
Letting Time *	11:00 AM
1st Posting Date	06/20/2017
2nd Posting Date	07/05/2017

Lettings and Design-Build Proposals

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

- Select the Letting via the Letting Overview Page.
- Select **Open** from the **Actions** menu on the Letting's row.
- The **Letting Summary** component opens on the General tab, which allows you to view or change 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".

Lettings and Design-Build Proposals

LETTING PROPOSALS

Design-Build Proposals are divided into two groups in PrP:

1.) Design-Build Low Bid

The Design-Build **Low Bid** Workflow for those type of Proposals has the following Phases that fall within the responsibility of the Design Build Contracting Office:

- *Received by DB Contracting Office
- *Advertisement
- *Addendum
- *Withdrawn
- *Technical and Bid Price Proposals due in District Office
- *Posting of Department's Intended Decision to Award
- *Reject and pass to DSS
- *Award Contract
- *Execute Contract

It is the responsibility of the staff handling these type of Design-Build Proposals to update the Workflow Phase of the Proposal appropriately as it progresses along the published "Schedule of Events".

And

2.) Design Build – All Types except Low Bid

The Design Build **All Types except Low Bid** Workflow has the following Phases that fall within the responsibility of the Design Build Contracting Office:

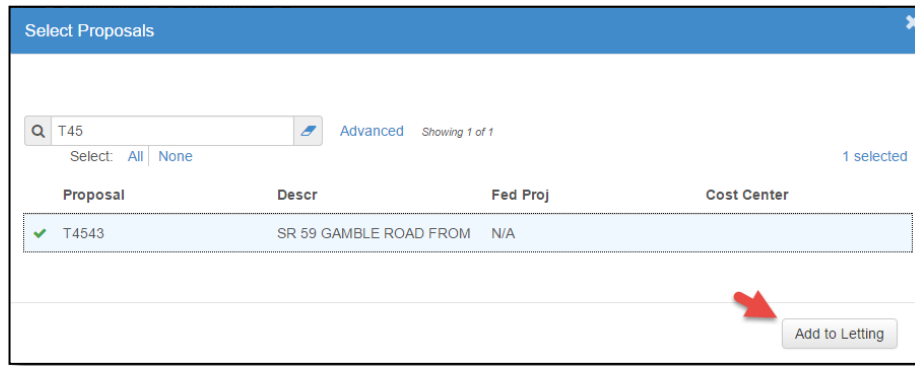
- *Received by DB Contracting Office
- *Advertisement
- *Addendum
- *Letters of Interest for Phase 1 due in District Office
- *Shortlist Posting
- *Technical Proposals due in District Office
- *Price Proposals due in District Office
- *Withdrawn
- *Posting of Department's Intended Decision to Award
- *Reject and pass to DSS
- *Award Contract
- *Execute Contract

It is the responsibility of the staff handling these type of Design-Build Proposals to update the Workflow Phase of the Proposal appropriately as it progresses along the published "Schedule of Events".

Lettings and Design-Build 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.

After those steps are completed Proposals attached to a Letting should then be given the Workflow Phase “Advertised” or “Advertisement.”

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.

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

Lettings and Design-Build Proposals

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

Overview Purchases Status

Letting Summary

▼ Letting: 06170515

General

Proposals

Workflow

Select Proposals...

Call	Proposal	Status	Status Dt	Publication Dt
001	E6K57	00 - Advertised	02/27/2017	02/27/2017

It should be noted that the requirements for a Design Build 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” or “Advertisement”.
- 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.

Letting Summary

▼ Letting: 06170608

General

Proposals

Workflow

Select Proposals...

Call	Proposal	Status	Status Dt	Publication Dt	Award Vendor	Seq	Addenda	Pass Flag
001	E6L45-R0		04/18/2017	04/27/2017				
002	E6K90		04/18/2017	04/27/2017				

Open Row Actions Menu

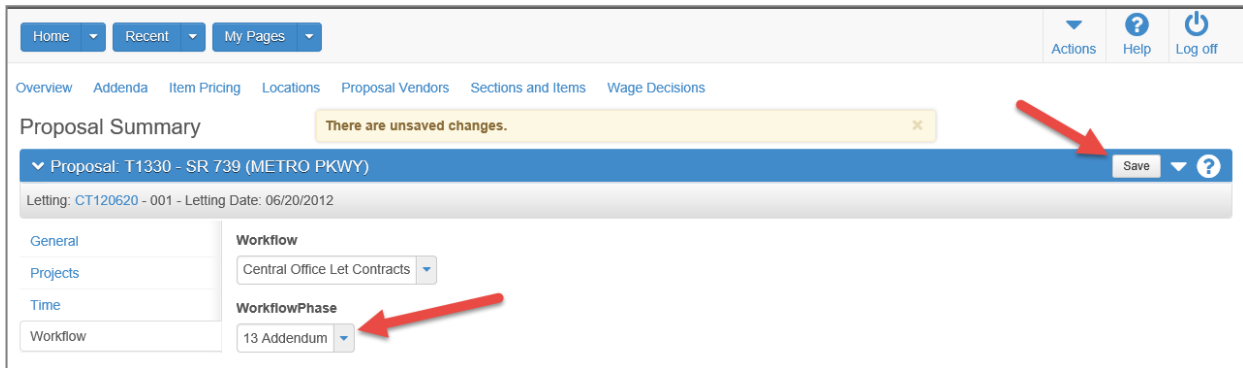
- Actions
- Exclude from Search Results
- Tasks
- Check Out Proposal To Estimator
- Export Proposal To Estimator
- Export To Expedite
- Hello World
- Move
- Print Proposal Ids
- Project Cost Distribution Report
- Proposal Section and Line Numbers Report
- Remove

Lettings and Design-Build Proposals

Addenda

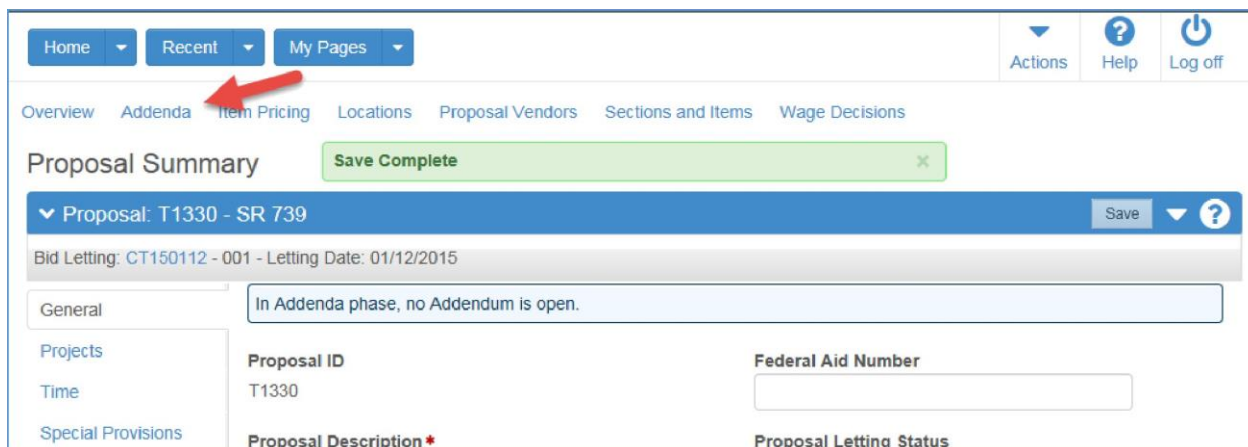
After a Design- Build proposal has been advertised, subsequent changes to proposal information that effect Bidders/Proposers must be tracked and distributed to these parties. This is accomplished by adding an Addendum to the proposal. An Addendum allows modifications directly into the system to the proposal information before the bid letting.

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



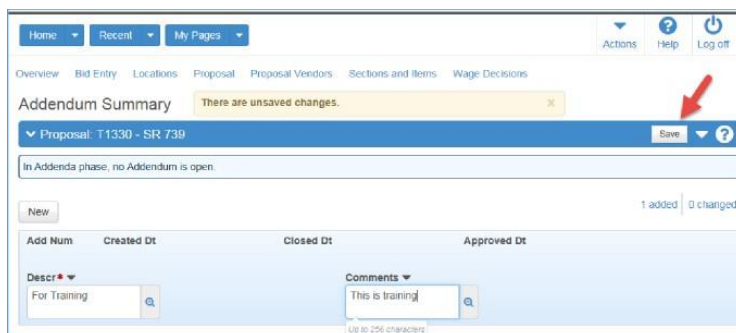
The screenshot shows the 'Proposal Summary' page for 'Proposal: T1330 - SR 739 (METRO PKWY)'. The 'Workflow' tab is selected, and the 'WorkflowPhase' is set to '13 Addendum'. A red arrow points to the 'Save' button in the top right corner. A yellow banner at the top indicates 'There are unsaved changes.'

To create an Addendum record:
Click Addenda.



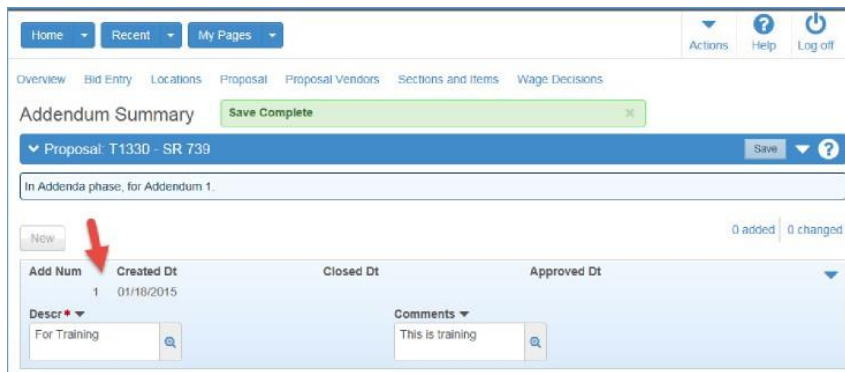
The screenshot shows the 'Proposal Summary' page for 'Proposal: T1330 - SR 739'. The 'Addenda' tab is selected, and a green banner at the top indicates 'Save Complete'. A red arrow points to the 'Addenda' tab. The page shows the 'Bid Letting: CT150112 - 001 - Letting Date: 01/12/2015' and a message 'In Addenda phase, no Addendum is open.'

Then Click Save.



The screenshot shows the 'Addendum Summary' page for 'Proposal: T1330 - SR 739'. A red arrow points to the 'Save' button in the top right corner. The page shows a message 'In Addenda phase, no Addendum is open.' and a table with columns: Add Num, Created Dt, Closed Dt, Approved Dt, Descr, and Comments. The 'Descr' field contains 'For Training' and the 'Comments' field contains 'This is training'.

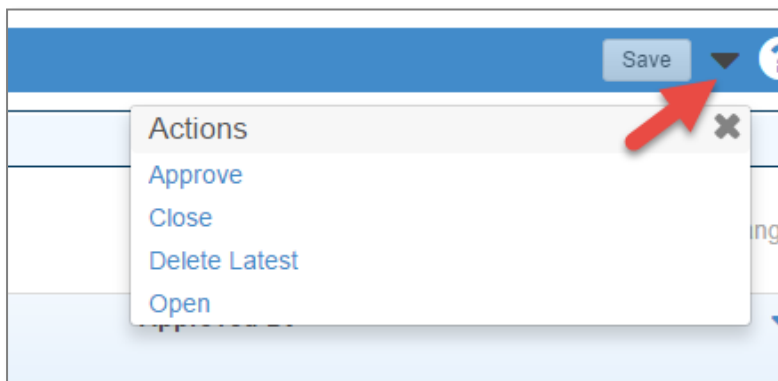
Lettings and Design-Build Proposals



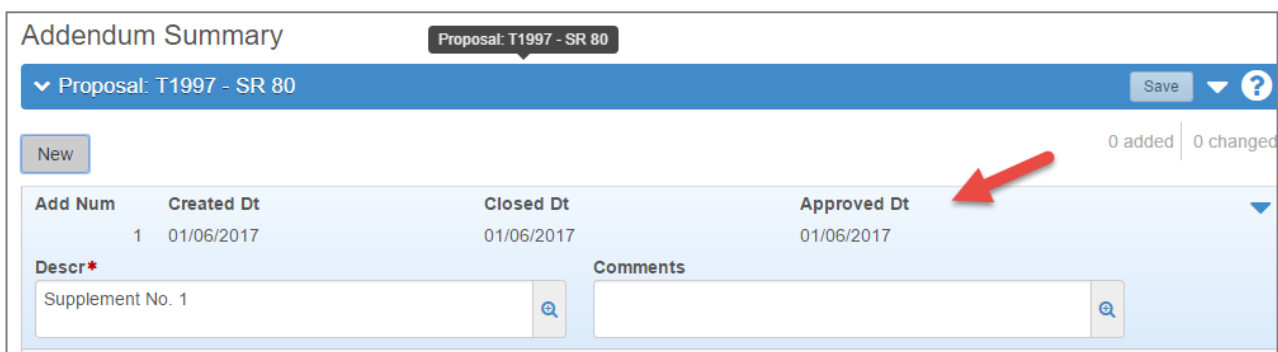
Note: After the Save completes, the Application assigns ADD Num. and Created Dt.

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.



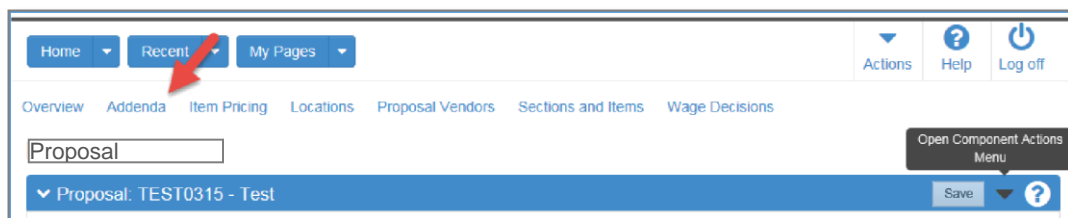
Note the dates that are System Supplied when each step is accomplished. Once approved, an addendum cannot be reopened or changed.



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.

Lettings and Design-Build Proposals

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:

A screenshot of the 'Addendum Summary' form. At the top, it says 'Addendum Summary' and 'There are unsaved changes.' Below this is a header for 'Proposal: E6TEST - STATEWIDE DESIGN CES' with a 'Save' button. A 'New' button is on the left. The main area contains a table with columns: 'Add Num', 'Created Dt', 'Closed Dt', and 'Approved Dt'. The first row is highlighted in blue and contains 'Test 1'. To the right of the table, there are fields for 'Description Comments' and 'Test 1'. A red box highlights the 'Description Comments' field.

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 Phase must be set to **ADDENDA** 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.

Lettings and Design-Build Proposals

Letting Date/Time

When the Scheduled Letting Date/Time occurs, the Letting' Workflow Phase should be changed to the Receive Bids statement.

[Overview](#) [Purchases](#) [Status](#)

Letting Summary

▼ Letting: 06170608

General

Proposals

Workflow

Workflow

District Office and Turnpike Lettings (Lettings Workflow) ▼

WorkflowPhase

Activites prior to Letting ▼

Activites prior to Letting

Letting

Activities following receipt of electronic Bids

Post Letting Activities

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 Work Flow Phase "Post Bids" and the posting activities should be accomplished.

Workflow

Design Build (All types except Low Bid) ▼

WorkflowPhase

08 Technical Proposals due in District Office

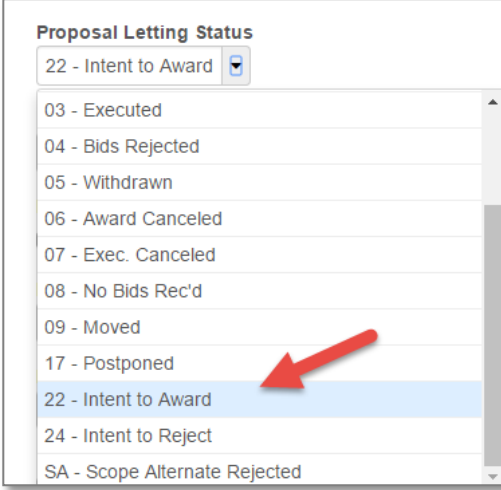
09 Price Proposals due in District Office

10 Withdrawn

11 Posting of Department's intended decision to Award

Lettings and Design-Build Proposals

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.



Proposal Letting Status

22 - Intent to Award

03 - Executed

04 - Bids Rejected

05 - Withdrawn

06 - Award Canceled

07 - Exec. Canceled

08 - No Bids Rec'd

09 - Moved

17 - Postponed

22 - Intent to Award

24 - Intent to Reject

SA - Scope Alternate Rejected

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:

[Award Proposal Steps](#)

[Execute Contract Steps](#)

[Reject Bids Steps](#)

Lettings and Design-Build Proposals

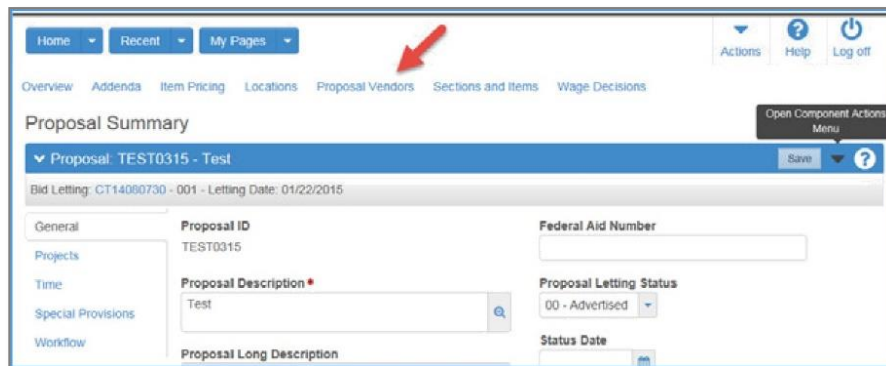
SPECIAL PURPOSE BID ENTRY (INCLUDES DESIGN-BUILD PROPOSALS WHERE ELECTRONIC BIDDING IS NOT USED)

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 Expedite 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:

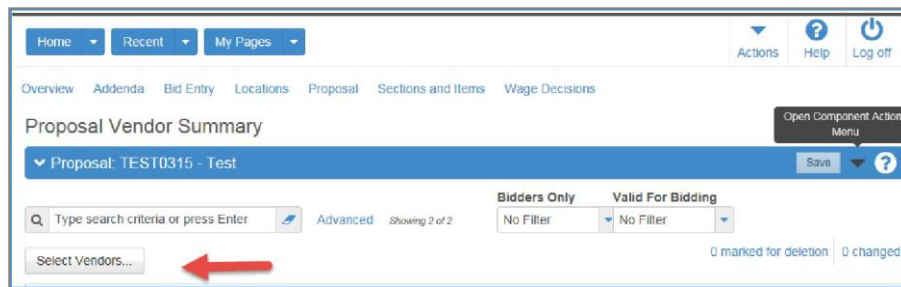
1. From the Proposal General Tab click Proposal Vendors.



The screenshot shows the 'Proposal Summary' page for 'Proposal: TEST0315 - Test'. The 'Proposal Vendors' tab is selected in the top navigation bar, indicated by a red arrow. The page displays various fields for proposal details, including 'Proposal ID', 'Proposal Description', 'Federal Aid Number', 'Proposal Letting Status', and 'Status Date'.

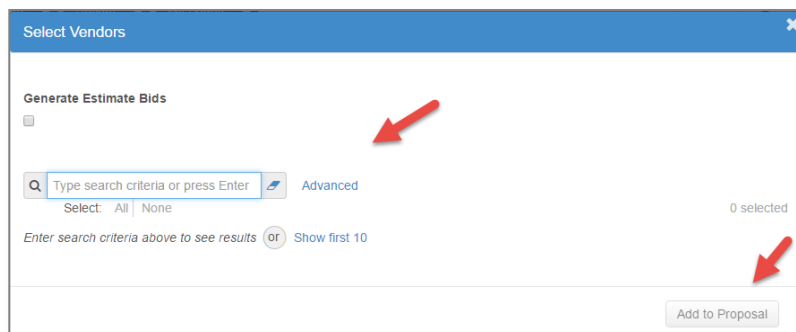
The system displays a modal window for locating and adding reference vendors.

2. Click the Select Vendors button.



The screenshot shows the 'Proposal Vendor Summary' page for 'Proposal: TEST0315 - Test'. The 'Select Vendors...' button is highlighted with a red arrow. The page includes a search bar, filters for 'Bidders Only' and 'Valid For Bidding', and a 'Show first 10' option.

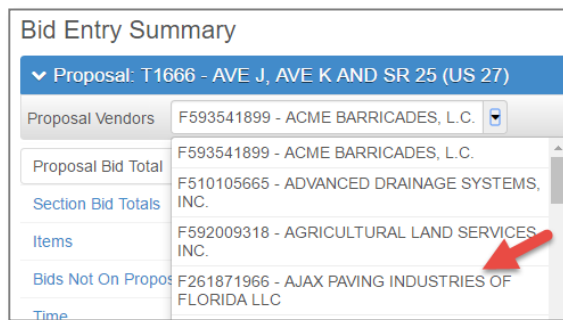
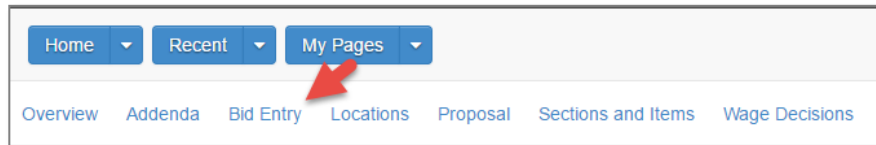
3. In the Select Vendors modal window, first locate the vendor you want to add as a bidder by typing criteria in the Quick Find search box or by clicking Show first 10. The system lists all the vendors that meet your search criteria.



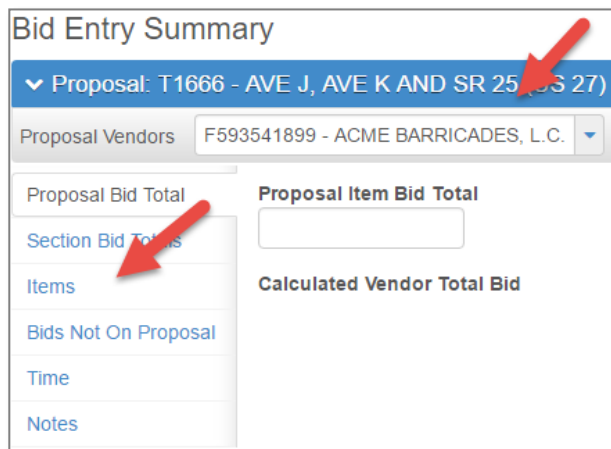
The screenshot shows the 'Select Vendors' modal window. The search box is highlighted with a red arrow, and the 'Show first 10' button is also highlighted with a red arrow. The window includes a search bar, filters, and a list of vendors.

Lettings and Design-Build Proposals

- 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.
- 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.
- 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.



- Select the Vendor from the Bid Entry Screen dropdown menu.
- Click the Items Tab and enter the Vendor's Bid for each Item's Unit Price and Extended Amount.



- After this process is complete, verify the Section Bid Total are correct and enter the Proposal Item Bid Total in the field shown above.
- Follow the standard process steps performed prior to the Tech/Award Committee meeting for the subject letting from this point forward.