

User's Guide to APA

Automated
Proposal
Application

Maintained by the Contract Standards and Development Unit

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Preface

This user guide provides user's step-by-step instructions for the initial set up and use of the Automated Proposal Application (APA) web based line up sheet used in the creation of NCDOT highway construction proposals. The Contract Standards and Development Unit maintains the APA and a library of provisions used in the General, Roadway and Standard Provision sections of the proposal. Division personnel and other responsible units are asked to supply and maintain project specific provisions and guidance in addition to these standard provisions maintained by the Contract Standards and Development Unit. Any provisions or suggestions for improvement can be directed to specs@ncdot.gov.

The APA provides a simple solution for uploading project information, using the current standard provisions and guidance, inserting project specific provisions, providing a consistent look in proposals, and sharing project information between districts, divisions and Raleigh; as well as MPO's, RPO's, cities, towns and private engineering firm contractors tasked with compiling proposals using NCDOT managed State and Federal funding. The user can customize the line up sheet by specifying if the project is for general highway construction, resurfacing projects, small business projects, etc.

The program automatically formats the proposal into Times New Roman font and single spaced paragraphs. The headings and page numbers for the proposal are automatically supplied. A Table of Contents is created using the formatted headings of the provision titles in the General Section and using the unit titles.

APA highlights project specific data (red text, "tags") in the saved proposal for quick review. Project data used through the proposal is either uploaded automatically or only entered once. Location-specific data like address or Proposal Engineer's name can be customized for each proposal as needed. Other pre-populated information is aligned with the advertisement date set for the project.

Once a proposal is saved, it can be called up using the contract number, TIP number, Description, or WBS number. APA checks for updates automatically and replaces the lineup sheet on your Desktop with the latest guidance. If you return to a saved project, the project will automatically include the latest asphalt, fuel and steel prices inserting the correct values based on the advertisement date, provision guidance, and provision file updates in your previously saved project will also be available. If funding changes you may change the project between funding sources (state or federal) and the provisions will update accordingly to reflect that change removing those that are unapplicable and adding the new provisions that are applicable to that funding source for the project edited.

APA is a tool to quickly create and review proposals in a standard format using the latest data available. Your feedback is essential to make this tool efficient! Please send comments to specs@ncdot.gov.

Chapter 1: Getting Started (One Time Only)

Topics you will learn in this chapter:

- ✓ Automated Proposal Application (APA) Access Process.
- ✓ Opening APA.

Automated Proposal Application (APA) Access Process

In order to use APA, you must be an NCDOT employee, have an NCID, and request permission to access the system. Chrome or Edge or acceptable browsers for this application. In order to be part of the user list, please follow the instructions on this website <https://connect.ncdot.gov/resources/Specifications/Pages/APA.aspx> Feel free to email specs@ncdot.gov if you have any questions. This is a one-time activity and should not need to be repeated.

Internal NCDOT employees, to include embedded consultants, steps required to access the system:

Fill out and submit the form on this website

<https://connect.ncdot.gov/resources/Specifications/Pages/APA.aspx>.

APA Access Form

*Last Name

*First Name

*Business NCID Username
Be sure this is a Business NCID and not an Individual NCID (State & Local NCIDs will also work)

*Full Company Name
Internal NCDOT users can put NCDOT for company name.

*Email
Please enter valid email address: name@example.com

Once you have received confirmation with an introductory email that you have permission, you may access the application by clicking on "Launch APA".

APA

Click the button below to launch the Automated Proposal Application.

If you have access issues with APA, please contact specs@ncdot.gov.

External to NCDOT employees steps required to access the system:

You will need to have a Business NCID available to share or acquire a Business NCID. Follow the instructions on this site to obtain a Business NCID. <https://connect.ncdot.gov/resources/Specifications/Pages/APA.aspx>.

External Users - Get Access - NCID

New External Users will need a **BUSINESS NCID** to sign in. An individual NCID will not work properly for access to NCDOT Connect websites. Follow these steps to get your NCID and access to the **Automated Proposal Application (APA) Site**. *Internal NCDOT users can proceed directly to the form below.*

If you do not have a Business NCID or it is expired:

1. Click this link to get your business NCID - <https://connect.ncdot.gov/getaccount/>
2. Please check your email to complete the registration process or you will have to re-register again after 3 days. Follow the link in the email to confirm your email address.
3. Make sure the above steps are completed prior to sending the request via the form below.
4. Once your NCID is synced and added to the DOT site you will receive another email letting you know you have been added and You must then follow the link in the email to change your password **BEFORE YOU CAN ACCESS** the DOT site.

(Note: Step 4 above happens after you receive confirmation of the permission request form below being completed for APA access.)

Next fill out and submit the form on this website

<https://connect.ncdot.gov/resources/Specifications/Pages/APA.aspx>.

Chapter 1: Getting Started

APA Access Form

*Last Name

*First Name

*Business NCID Username

Be sure this is a Business NCID and not an Individual NCID (State & Local NCIDs will also work)

*Full Company Name

Internal NCDOT users can put NCDOT for company name.

*Email

Please enter valid email address: name@example.com

Submit

You will receive a notification similar to what you see below.

----- Forwarded Message -----

From: ncid_notifications@nc.gov <ncid_notifications@nc.gov>

To: "loana [REDACTED]"

Sent: Sunday, September 17, 2023 at 07:17:05 AM EDT

Subject: Change your NCID account password

Hello loana [REDACTED]

This is an automated message sent by the myNCID Self-Service system. Please do not reply to this message.

You have been added to the DOT AD group.

Before you access the DOT AD application, please go to <https://myncid.nc.gov/> and change your password.

Thank you.

As well as another notification with an introductory email that you have permission, you may access the application by clicking on "Launch APA" as well as instruction processes.

APA

Click the button below to launch the Automated Proposal Application.

Launch APA

Reminder Complete Step 4 of the earlier set of instructions as noted below.

External Users - Get Access - NCID

New External Users will need a **BUSINESS NCID** to sign in. An individual NCID will not work properly for access to NCDOT Connect websites. Follow these steps to get your NCID and access to the **Automated Proposal Application (APA) Site**. *Internal NCDOT users can proceed directly to the form below.*

If you do not have a Business NCID or it is expired:

1. Click this link to get your business NCID - <https://connect.ncdot.gov/getaccount/>
2. Please check your email to complete the registration process or you will have to re-register again after 3 days. Follow the link in the email to confirm your email address.
3. Make sure the above steps are completed prior to sending the request via the form below.
4. Once your NCID is synced and added to the DOT site you will receive another email letting you know you have been added and You must then follow the link in the email to change your password **BEFORE YOU CAN ACCESS** the DOT site.

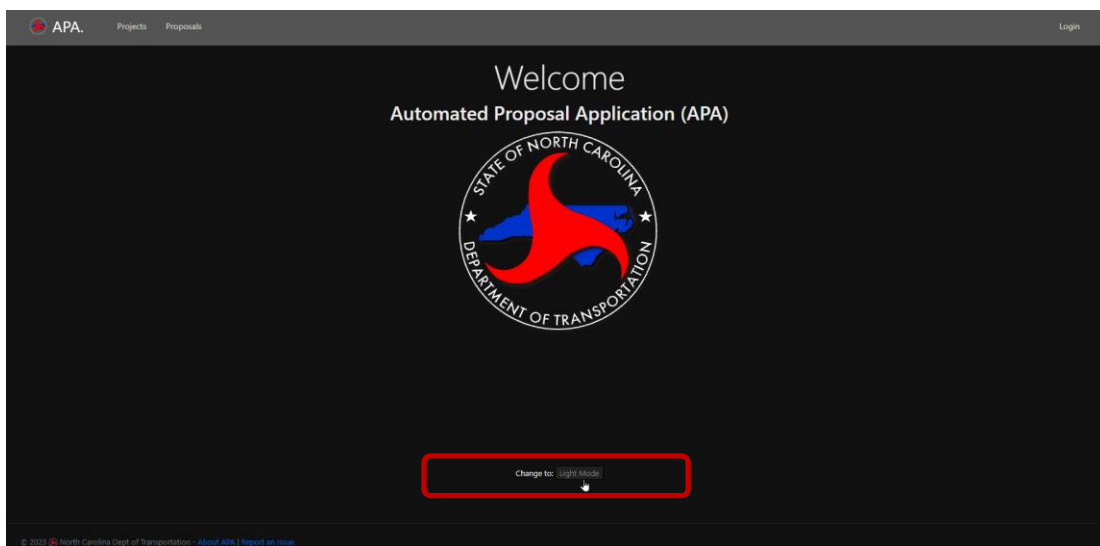
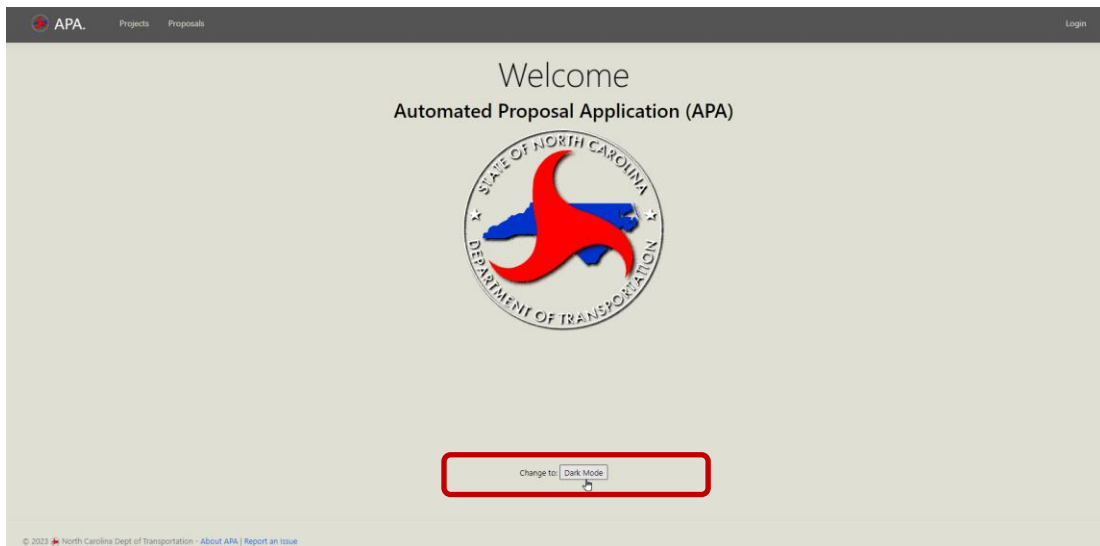
However, if you still have questions on your NCID, please contact the NCDIT Service Desk at any time by calling 800-722-3946. You can also chat live weekdays from 8 a.m. to 5 p.m. with an NCDIT Service Desk specialist at <https://it.nc.gov/support/chat>. If you have access issues with APA, please contact specs@ncdot.gov.

Chapter 1: Getting Started

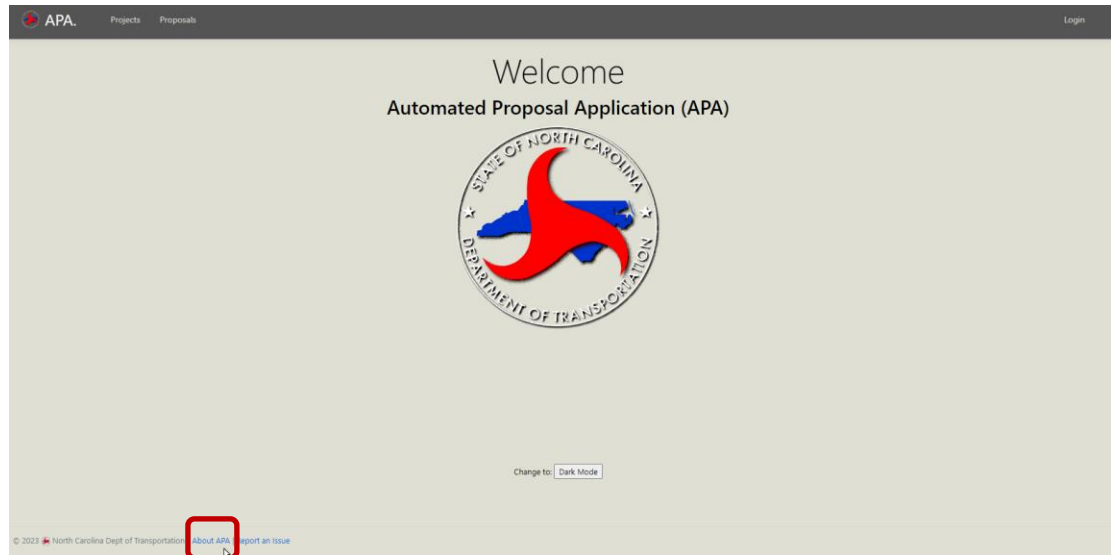
Opening APA

Congratulations, you have APA access <https://engblp.services.ncdot.gov/EAD/APA> and you have become a registered user, and your Word template is ready to create a proposal!

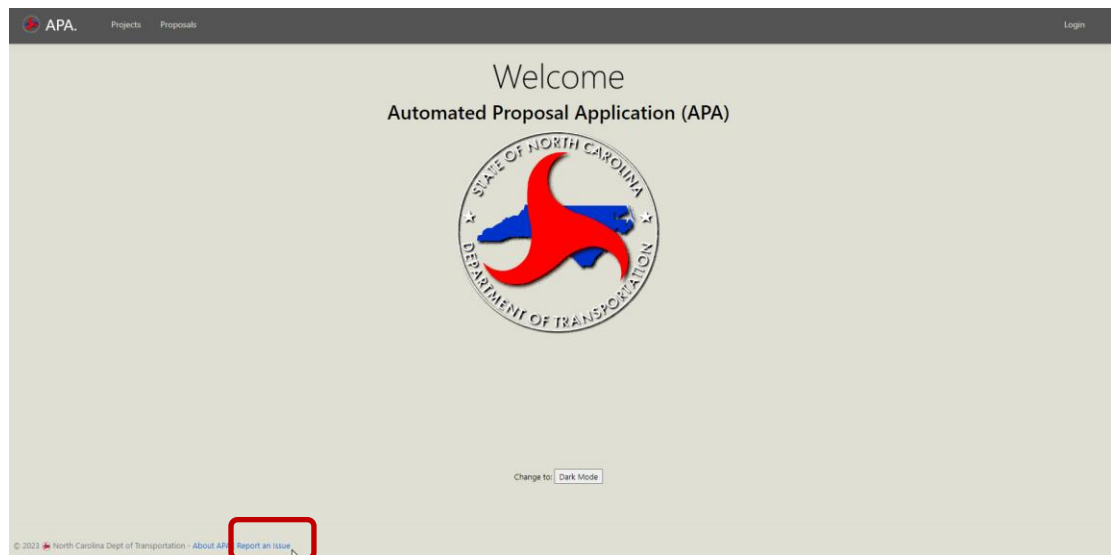
The first step is to choose your view. You have the option to choose "Dark Mode" to change the look of the tool. The outcomes of selected dark mode is noted below. You will need to choose your mode type prior to logging in. Simply select "Light Mode" to change back to the initially displayed view.



The Automated Proposal Application (APA) can be found at this website <https://engblp.services.ncdot.gov/EAD/APA> without entering the home page. "About APA" will indicate who should use the application as well as permission and access process in case an individual locates the APA program prior to identifying the APA landing page with the permission instruction direction.

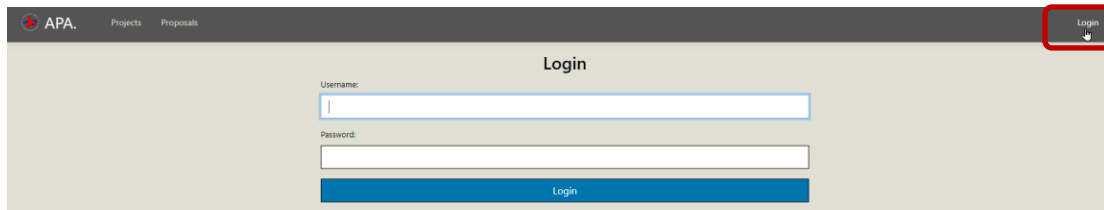


To the right of "About APA" is "Report an Issue", this provides instructions on who to contact if you have an issue with a provision, system performance, permission issues, or general questions about APA but first it directs you to the landing page where more information is available such as these instructions.



Chapter 1: Getting Started

By selecting "Login" in the upper right hand corner, this will move you to the following screen.

A screenshot of the APA (Automated Proposal Application) login interface. The top navigation bar includes the APA logo and links for 'Projects' and 'Proposals'. A 'Login' button with a mouse cursor is highlighted in the top right corner. The main content area is titled 'Login' and contains two input fields: 'Username' and 'Password'. Below these fields is a blue 'Login' button.

- Internal NCDOT employees, to include embedded consultants, use your login and password you use to get into your computer.
- External to NCDOT employees use your Business NCID and Business NCID Password.

If you have issues accessing or using the Automated Proposal Application, please contact specs@ncdot.gov.

Chapter 2:

Using APA

Topics you will learn in this chapter:

- ✓ APA Overview.
- ✓ Projects Page
- ✓ Proposal Page
- ✓ Inserting Special Provisions.
- ✓ Updates.

APA Overview

Order

APA is designed to follow the finished proposal which mirrors the Standard Specifications, the Roadway Standard Drawings, and the Master Pay Item List. If you add project specific provisions, please add them consistently with the order the items would appear in the Standard Specifications and/or the Master Pay Item List.

Engineering Judgment

As with all things related to highway construction, no tool or system replaces your engineering judgment. The explanations are made for use with Central (Raleigh) let projects and may not always apply to Division or District or Local Government proposals. There are provisions specific to each entity and others aligned with all proposal types. The links to the Master Pay Item list are available when the provision references a pay item.

Automation

Fuel price, asphalt price, and steel price adjustments are automatically updated based on the advertisement date of the project. These price adjustments will not be allowed to be overrode by the user. The only way to adjust those values are to change the

Chapter 2: Using APA

advertisement date on the project. If the provision for fuel, asphalt, or steel is not included in the proposal then these values in turn will not be included.

The typical provisions used on every project are automatically included; however, each provision must be reviewed to determine relevance for the work of the project. If there are provisions automatically included that are going through a period of an update, you may see multiple versions of the same provision selected, you will need to ensure only the provision with the let date of interest is included and change the other provision to do not include.

There are inputs that could be repeated in various portions of the proposal, APA is set up so you only have to select or key the value one time to reduce potential for error/inconsistency. An example is County, once selected (single or multiple counties) when you create a Project it will appear at the top of the pages of the proposal and in various provisions where appropriate.

Updates

APA will provide you all the current and any upcoming provisions that have been defined. Typically updated or new provisions introduced are provided two months prior to the letting. Once the period of letting has past and a new version has been introduced, historical provisions will be archived. For all let projects the output will continue to retain the version of the provision utilized no matter if there is an update or if that provision has been obsoleted for some reason. Please ensure you check the system for the latest updates including new provisions, updated guidance, and program revisions every time APA is used for new project and proposal development. Use the "Save" button to save the data for APA projects and proposals processes, however you will also note each entry is being saved.

The provision files on the APA are maintained by Contract Standards and Development Unit and will be kept up to date. The special provision inserts which you add to the APA proposal are your responsibility to maintain. If you use a provision frequently, please send it to specs@ncdot.gov. Adding frequently used provisions to the APA system is quick and easy.

Access

Because these proposals may represent highway construction contracts that have not been advertised, there is a certain level of security associated with APA. Users have to be on a registered user list, data files are protected as each user will only see what they are managing or if the managed project or proposal is in the purview of the user they will be able to view but not edit the project or proposal with the exception of the

Proposal notes fields to provide feedback/input. If you have any issues seeing a project or proposal that is in your purview, please email specs@ncdot.gov.

When you initially view the projects and proposals list it will be set-up to show you what you can edit that is actively being worked. You can use the functions available to change views as needed. You can also search on key terms to narrow to the Project or Proposal of interest. The views available are "Show Only Active" and "Showing All". "Show Only Active" will be what you can see when you first enter the Automated Proposal Application that you can edit or view that are active. "Active" means that not all of the following criteria are satisfied: Let Date is past "today's date", Proposal Stage is not in a "Reviewer" level stage, or you do not have a Generated Proposal yet available. Once all those criteria are met, the project will move to "Showing All" view only.

Each group that logs in will see different content within the system, restricted to what you have permission to review or edit. In the following pages edit and view permissions will be described.

Edit and View Access is set-up as follows:

Central Proposal Staff Super-users – Will be able to view and edit all Projects and Proposals, deleting Projects and Proposals upon request, change provisions available, provide supporting information that will be helpful in provision selection, and grant users proper access to the system.

Central Proposals Staff – Will be able to edit all proposals managed by the Central office and view all other proposals.

Division and embedded Consultant/Private Engineering Firm (PEF) Proposals Staff – Will be able to edit all Projects and Proposals managed by that specific Division and be able to view all Projects and Proposals managed by Local Government Agencies or Contractors/PEFs within that specific Division.

Local Government Agency Proposals Staff – Will be able to edit all Projects and Proposals managed by that specific Local Government Agency and be able to view all Projects and Proposals managed by Contractors/PEFs for that Local Government Agency.

Non-embedded Consultant/Private Engineering Firm (PEF) Proposals Staff – Will be able to edit all proposals managed by that specific Consultant/Private Engineering Firm and will not be able to view any additional Projects or Proposals.

If you have "View Access" you will be able to add "notes" to the overall proposal and at the provisions level (go to "Proposals" page, "View Proposal" to find those fields). Ensure you indicate in the Overall Proposal which provisions need reviewed by the

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“Editing” party. The “Editing party” may be listed with contact information in the overall proposal note field, ensure you contact them if you have feedback and that information is so provided. When you have edit access you have full rights to that project and proposal for all changes required to finalize the proposal. The Alternate Delivery Unit will have full access even in view permission, however.

You can further narrow what you see by using the “Advanced Search” icon. You can narrow to what you can “edit”, “view”, or even use this function to find specific proposals that you are editing as well based on the information you know about that proposal. All possible options will be listed in each drop down menu, but you can only view those in your purview, if select an option that isn’t in your purview then you will see there are no records to show you due to your permissions. For example, if I am not responsible for Alamance County then I won’t be able to view any Alamance County proposals. If you would like to see only those that you are editing use Advance Search to change “Managed By” to your group (i.e. if Division 5, select Division 5; City of Raleigh select that option). Close, Clear Search, and Search are available as functions to select. Close will exit without the search, Clear Search will clear your selections, Search will search for what you selected.

Advanced Search ×

Project Description, Contract/TIP/WPB #, Project Type

Proposal For

Managed By

Project Type

Division

County (select multiple via Ctrl/Shift + Click)

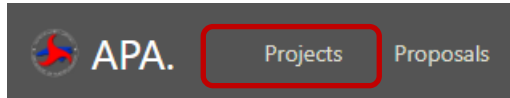
Alamance
Alexander
Alleghany

Projects Page

The first question the user must answer when starting APA is what is found on the "Projects" page of the website.

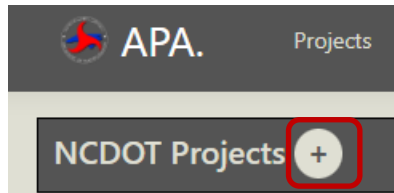
To add a new project:

Go to the "Projects" tab on APA



The next step your options are to start with a new project being developed. This will be described first. The second is Cloning which will be described following that option.

To do this Select the "+" icon at the top of this page.



Key in the data described below. The default values will be different for you based on your permissions. Also the Advertisement and Let Date default to the date you created the new proposal, just override those dates and make the appropriate default value edits. As mentioned above, most users will have your Division and County list required display at the beginning, it will be 0 for users that may be working projects for various Divisions.

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Create Project

Project Description	Advertisement Date
<input type="text"/>	<input type="text" value="09/21/2023"/>
Contract Number (or other unique ID for LGAs)	Let Date
<input type="text"/>	<input type="text" value="09/21/2023"/>
Managed By	Proposal For
<input type="text" value=".Central"/>	<input type="text" value=".Central"/>
TIP Number	Project Type
<input type="text"/>	<input type="text" value="All Division Let Provisions"/>
WBS Number	Division Number
<input type="text"/>	<input type="text" value="0"/>
Project Counties	<input type="checkbox"/> Federally Funded?
<input type="checkbox"/> Durham <input type="checkbox"/> Franklin <input type="checkbox"/> Granville <input type="checkbox"/> Person <input type="checkbox"/> Vance <input type="checkbox"/> Wake <input type="checkbox"/> Warren	
<input type="button" value="Show All Counties"/>	
<input type="button" value="Create"/>	
Back to Projects List	

It includes the following information:

Project Description - Include any description details that you would like to include to remind yourself what the project is about so you can recall the project for current or future project and proposal work reference.

Contract Number (or other unique ID for LGAs) – Key the contract number or if there is not a contract number with your processes this field is repurposed for LGAs to include whatever identifier that would be valuable to note at the top of the proposal pages in the page header.

Managed By – This field will be automatically populated based on APA permission set-up. i.e. .Central, .AlternateDelivery, .TurnpikeAuthority, .Division XX, .City of XXXXX, Contractor XXX. Where XX is the Division number 1 through 14, and XXXXX is the city. Contractor XXX is the contractor name.

TIP Number – This field is to populate the TIP identifier if applicable, otherwise key N/A

WBS Number – This field is to populate the WBS Number identifier, otherwise key N/A

Project Counties – The default will be to show the County listing for the Division in which you physically reside, if you need additional Counties for your Project change use the “Show All Counties” button below the list to find additional counties required for this project scope. The managing Division should be the Division selected. Based on county selection there are certain provisions that are auto-selected as “include” or “do not include”.

Advertisement Date – Key the date in which you are going to advertise this project. Defaults to today’s date when initially opened to create a new project.

Let Date – Key the date in which you are going to let this project. Defaults to today’s date when initially opened to create a new project.

Proposal For – Based on APA set-up this field will be defaulted to your location (Division, Local Government Agency) or will be a drop down with additional options to select the appropriate Division and/or Local Government Agency you are completing the Project and Proposal for. Central, Turnpike Authority, and Alternative Delivery should select the Division location so that Division can be aware (view) the Project and Proposal in development.

Project Type – Select the type of project you are working for that proposal. There is a list of project types available based on your APA set-up. Examples are general construction or resurfacing project type. Note the indicator of “Raleigh Let” or “Division Let” or “Local Government Agency” appears on the left side of the designation. If a specific unit has a modified provision set there is a designation for that unit instead of this structure. If you are working on a project that is not easily categorized, you may choose “ALL Provisions” where you will get to see every standard provision programmed into APA. If you do choose “ALL Provisions,” conflicting and otherwise mutually exclusive provisions will be automatically selected, and you will need to remove these duplicated, conflicting provisions manually by ensuring not more than one are in an “include” state for your proposal. Based on your APA set-up your list will be narrowed to the options available to you to select. Project type is a critical factor to what coversheets, forms, and provisions will be displayed as options in your proposal as well as which are auto-selected as “include” based on this input.

Division Number – Based on APA set-up your Division will display based on where you reside, however if you are APA set-up could require you to work a Project and Proposal for all Divisions or Divisions and Local Government Agencies

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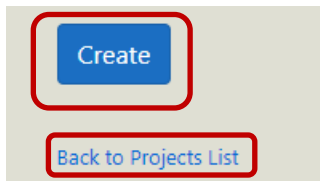
then the default is 0 and it must be changed to the appropriate Division. By selecting the appropriate location on "Proposal For" this will change the 0 default to the appropriate Division once you select and exit the "Proposal For" field. This field is restrict to 1 through 14.

Federally Funded? – Check the box if this Project and Proposal is being funded with Federal dollars. Leave unchecked if State funded. If for some reason funding changes, you may check or uncheck to manage the provisions displayed for that proposal. This field is another critical factor to what provisions will be displayed as options in your proposal, and certain provisions displayed as auto-selected as "include".

"Create" icon – Creates the Project with the information you entered.

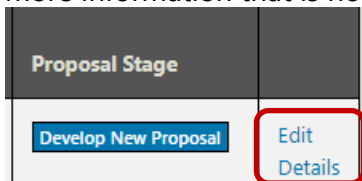
"Back to Projects List" icon – Allows you to not save what you have entered.

Select "Create" when complete and save interest or "Back to Projects List" if you do not want to save what you input.



Now that the project is initially created. The Projects page will have your project information.

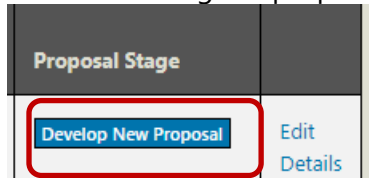
You may also "Edit" the project at any point, if you are managing this project. You will only see "Details" if you have view rights only which shows you a more information that is not available on the Projects page listing.



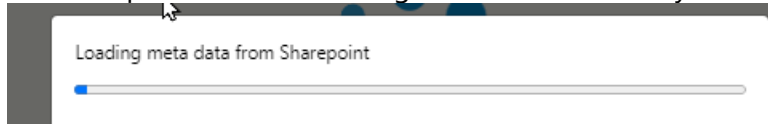
You will also see "Clone" following these options, that is the alternative for new project development, which will be described later. This option will not be available when you have "View" rights only.



“Develop New Proposal” is the first step that starts the Proposals tab, unless you “Clone” a project (which will be described shortly). When you are ready to start building the proposal select that icon, “Develop New Proposal”.



After you select “Develop New Proposal” you will see a status bar noting the progress of this development. As you complete actions you will see a status bar or a quick transition throughout the functionality of APA.



After completed, select the “Create” icon on the “Create Proposal” screen that initially gets created, “Create Proposal” is followed by several of the fields you added to the Projects page and a couple additional fields of Proposal Stage of “Draft Proposal Reviewer 1” default and a Note field for the overall proposal. Do not make any initial changes on this pop up screen, just select “Create”.



Also on the “Projects” page, you should be aware of the following:

In the “Proposal Stage” column field for your project after you have initially created your proposal. If you have already selected that icon, you will see a link to the proposal in development titled as the current review stage selected on the proposal page. The reviewer could be a different individual, or your pass of the provision work. There are also indicators for “Draft Proposal Reviewer 3”, “Advertised Proposal”, and “Final Let Proposal”



“Edit” will return you to the initial project page set-up page for you to complete any edits required. For example, if there is a funding state “State” to “Federal” or vice versa, you can edit and check or uncheck that field. You do not have to delete and recreate the project due to changes such as this. The provisions will align with your “Project” set-up selection.

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Draft Proposal
Reviewer 1

Edit
Details

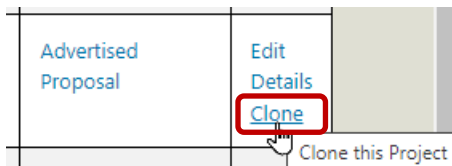
"Details" provides you a few additional details on this project compared to what you can see on the landing page.

Draft Proposal
Reviewer 1

Edit
Details

The alternative to creating a project (+ icon) is to "Clone" a project you have already created.

Most likely you would only want to clone a proposal that has been advertised or final let stage as you have completed all the work for not only the projects page but also the proposals page, which will be discussed next. You would also only want to clone a project that is for the same "Proposal For", "Project Type", "County", "Funding Source (Federal or State)" of interest as you can't change those values when you initially clone the project and make some edits. As mentioned in the last column of the Projects page you will see that there is "Edit", "Details" and "Clone". In this instance instead of clicking the + icon, you will select "Clone" of the project you would like to "Clone" that is very similar to the one you are currently working on.



When you clone the project the same information displays, with a few exceptions.

"Project Description", "Contract Number", "TIP Number", and "WBS Number" text adds "Copy of" prior to what was input for the project you originally selected to Clone. The "Advertisement Date" and "Let Date" will be the date you created the Clone. You can change only those fields prior to selecting the "Clone" icon. You can see in the screen shot below those circled are the only fields you can edit prior to cloning that project. Select "Clone" when you are done editing; if you changed your mind, "Back to Projects List" will cancel the clone.

Clone Project

Project Description: Copy of JUST A TEST DELETE ME PRIOR TO OFFICIAL LAUNCH. | Advertisement Date: 11/16/2023

Contract Number (or other unique ID for LGAs): Copy of CTESTING | Let Date: 11/16/2023

Managed By: .Division 05 | Proposal For: .Division 05

TIP Number: Copy of ALLDivProv | Project Type: All Division Let Provisions

WBS Number: Copy of AllDivProv | Division Number: 5

Project Counties (Div 5):

- Alamance
- Alexander
- Alleghany
- Anson
- Ashe
- Avery
- Beaufort
- Bertie
- Bladen
- Brunswick
- Buncombe

Federally Funded?

Show Division Only

Clone

[Back to Projects List](#)

In regard to cloning, after you begin editing your proposal and you discover the funding source changes (state to federal or vice versa) or if you need to change the county list, you may change those but only after you begin editing your proposal. Do not make those changes on the initial clone, make at least a few changes on the proposal prior to editing the project for those changes. In this instance the “Proposal Stage” is not initially the “Develop a New Proposal” but it will be the Proposal Stage cloned. “Advertised Proposal” or “Final Let Proposal” will need to be changed to “Draft Proposal Reviewer 1” when you first enter the proposal, by selecting that link or editing on the Proposals page which will be described next.

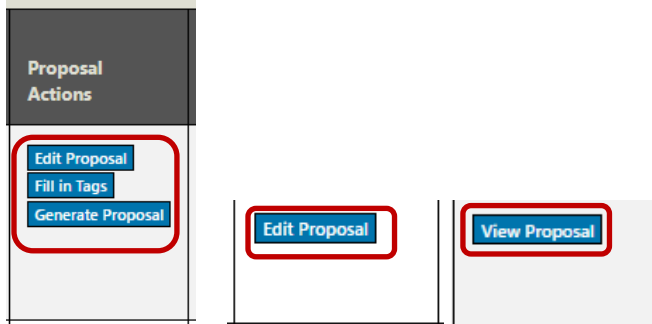
Proposals Page

APA’s Proposals landing page has many of the same features as the Projects landing page.

1. This page is searchable as well as mentioned earlier in this document. Can search by WBS Number, Contract Number, TIP Number, Description, etc.
2. It has a listing by proposal of key information about that proposal listed to include Generated Project Name (which includes the Contract Number (or LGA number of interest), TIP, and WBS. It has the Proposal Stage (Draft Proposal Reviewer #, Advertised, Let status), Note for the overall proposal, Advertisement Date, Let Date, Creation Date, Last Updated Date, Proposal Actions, Document Link if you have “Generated Proposal” at least one time.
3. The proposal will not be displayed until you complete all the steps of the prior section of instructions.

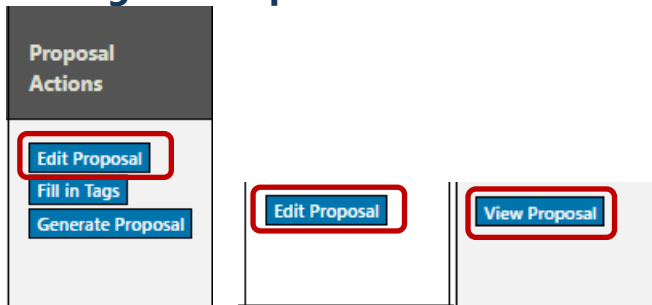
Proposal Landing Page Actions

This set of buttons under "Proposal Actions" will be critical to the development process. If you see "Edit Proposal", "Fill in Tags", and "Generate Proposal" it means you have begun provision selection, if you see ""Edit Proposal" only then you have just completed the prior section of instructions only and have not begun the proposal selection process. If you see "View Proposal" it means you only have "view" rights, where you can only make comments in the proposal when you enter "View Proposal" and review what another "Managing By" group has completed for that proposal that is being worked for you ("Proposal For").



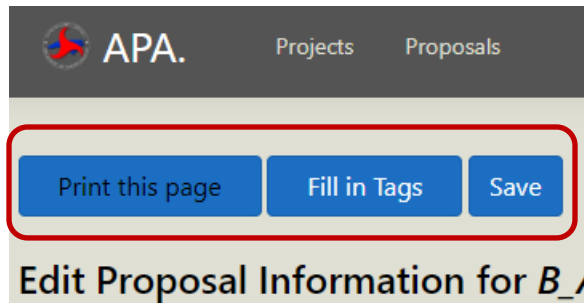
If you see a word file in the next column following "Proposal Actions" clicking that file is the same as the "Generate Proposal" action which send the proposal to your "C" drive, "Downloads" folder for movement and placement in an appropriate archive location.

Editing the Proposal



This button will open up the page for your project for the initial provision selection or to return to make further edits or in the "View Proposal" instance you can only edit the comments at the overall proposal or provision level. After selecting that icon you will enter a screen that has a list of provisions based on the "Project Type" and "Federal/State funding selection" and some additional information. If you are returning you will see the selections made.

At the top you will see a few options, "Print this page", "Fill in Tags", and "Save".



“Save” will save your selections and inputs to date, however as you key and leave fields of selection or input you will note that the system is “saving” each change. This “Save” icon is also at the bottom of the provision listing. After the “Save” icon there may be a provision that needs inserted. This will be covered in a later section of this document.

“Fill in Tags” will provide you a list of inputs to fill in based on your provision selection. Some of those fields will be auto-populated based on inputs already provided or systematically generated based on your advertisement date; while others you will need to fill in manually. We will look at this further later on in these instructions. Not all provisions have input fields so those provisions will not be represented on this list.

“Print this page” – Opens up a window to print or save your listing of provisions and any notes and if you decided to “Include”, “Do not include”, or if it remains a “?” on deciding to include it or not. The “Print” option will print the file or open up the “Destination” with the arrow to select “Save as PDF” instead. This action changes the “Print” icon to a “Save” icon. Cancel in all instances will leave this screen, just select “Cancel” and “x” of the print view to return to the “Edit Proposal Information” page.

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PRINT OPTION:

9/25/23, 9:08 AM about:blank

Project Description [ALL RALEIGH LET PROVIS]
Contract Number (or other unique ID for LGAs) [ALL RALEIGH LET PROVIS]
TIP Number [ALL RALEIGH LET PROVIS]
WBS Number [ALL RALEIGH LET PROVIS]
Creation Date [9/17/2023]
Last Updated Date [9/25/2023]
Proposal Stage [Draft Proposal Reviewer 1] Saved
Note [] Saved

Include-	Special Provision	Notes
[?]	A.01C_Updated_June_2023_Letting : Cover for Division Let (no SBE) Division projects non-SBE.	[] Saved
[?]	B.01C_Updated_January_2024_Letting : First Page of Proposal for Division Let (bond) Projects that need a first page of the proposal that is Division Let and has a bond requirement. Starting January 2024 this provision has been modified to the 2024 Standard Specifications.	[] Saved
[?]	B.01C_Updated_October_2023_Letting : First Page of Proposal for Division Let (bond) Projects that need a first page of the proposal that is Division Let and has a bond requirement.	[] Saved
[?]	B.01D_Updated_January_2024_Letting : First Page of Proposal for Division Let (Nonbond) Projects that need a first page of the proposal that is Division Let and does not have a bond requirement. Starting January 2024 this provision has been modified to the 2024 Standard Specifications.	[] Saved
[?]	B.01D_Updated_June_2023_Letting : First Page of Proposal for Division Let (Nonbond) Projects that need a first page of the proposal that is Division Let and does not have a bond requirement.	[] Saved
[?]	C.01A : Table of Content for Division Let - Paper Bids Projects that require a Table of Content for Division Let Paper Bids	[] Saved
[?]	C.01A_Updated_June_2023_Letting : Table of Content for Division Let - Paper Bids Projects that require a Table of Content for Division Let Paper Bids	[] Saved
[?]	C.01B_Updated_June_2023_Letting : Table of Content for Central Let and Division Let Electronic Bids Projects that require a Table of Content for Central Let and Division Let Electronic Bids	[] Saved

about:blank 1/31

Print 16 sheets of paper
Destination CSD330480 on DOT-C
Pages All
Copies 1
Layout Portrait
Color Color
More settings

Print Cancel

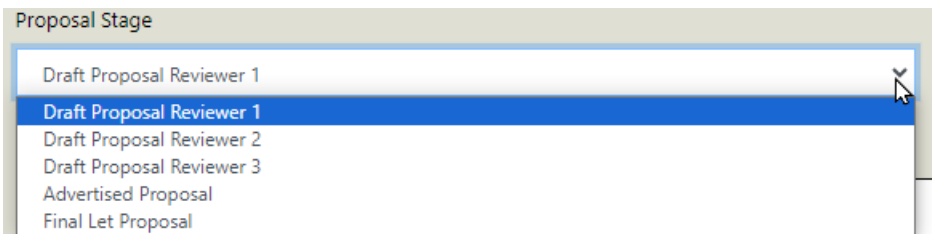
SAVE OPTION:

Print 31 pages
Destination Save as PDF
Pages All
Layout Portrait
More settings

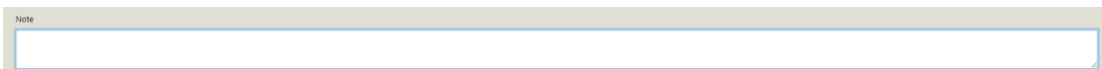
Print 16 sheets of paper
Destination CSD330480 on DOT-C
Pages CSD330480 on DOT-CCPT01.dot.nc.net
TSD210789 on DOT-CCPP10.dot.nc.net
CS265024 on dot-ccpp10
Save as PDF
Save Cancel

Following these options, there is a summary of what you saw on the Proposals landing page at the top which is locked from changes unless you go to the "Projects" page to make an appropriate edit for those fields. The fields include "Project Description", "Contract Number (or other unique ID for LGSs), TIP Number, WBS Number, Creation Date, and Last Updated Date.

This is followed by "Proposal Stage" that where you indicate the appropriate proposal stage. This is to keep track of your passes, or if you have a hierarchy of reviewers to finalize a proposal with the Draft Proposal Reviewer 1, 2, and 3 statuses. When you finalize for advertisement, you can change to "Advertised Proposal" and then finally when it is let "Final Let Proposal". This action locks down the proposal so there will not be a change when a provision is obsoleted or updated to hold the provisions you utilized for that proposal. Remember when you have cloned a project the initial proposal stage will be what the cloned project was when you initially cloned it (Advertised Proposal or Final Let Proposal), change the Proposal Stage to "Draft Proposal Reviewer 1" upon initially entry as you start the review process.



"Note", input field, follows this field. This is a note available for the full proposal and any reminders or reviewer communication you would like to note, what is keyed here will be displayed on the Proposal Page for your searching needs. If you would like those with "view" access with comments on the proposal to reach out to you via email and/or phone on any feedback they may have on the proposal being developed please key your name and appropriate contact method in this overarching proposals "Note" input field.

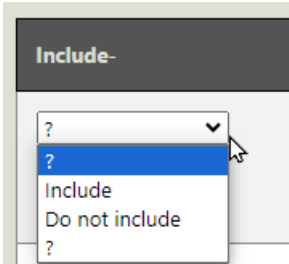


Following this field, you will see the following columns, "Include", "Special Provision" and "Notes".



"Include" is where you make a decision on if the "Special Provision" should be included. Most provisions will be default to "?", while some will be "Include" if it should be used for "All projects" or the County this proposal is for, others will be "Do not include" for the county defined provisions and the county is not selected.

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For example due to this being the header of the General Section, this provision below will be set to "Include" for all proposal types.

Include-	Special Provision	Notes
Include	SP01 G000_Updated_July_1995_Letting : PROJECT SPECIAL PROVISIONS - General <small>All projects; Use this as starter for "General Section".</small>	

"Special Provision" will have a link (blue text) when selected it will generate a download that can be found on your "C Drive" "Downloads" folder where you can review that provision further to make a better decision to include or not. If you open a provision file using the blue link available you will note there may be indicators that start with "Ç". The C-cedilla, "Ç", is a Latin script letter which indicate the locations where the tag values you key will be placed in the proposal. We will discuss those "Ç" tags further in the Fill in Tags section of this document.

SP01 G000_Updated_July_1995_Letting : PROJECT SPECIAL PROVISIONS - General <small>All projects; Use this as starter for "General Section".</small>

The "Provision Title" and "Reason for Use", can also assist in your selection process.

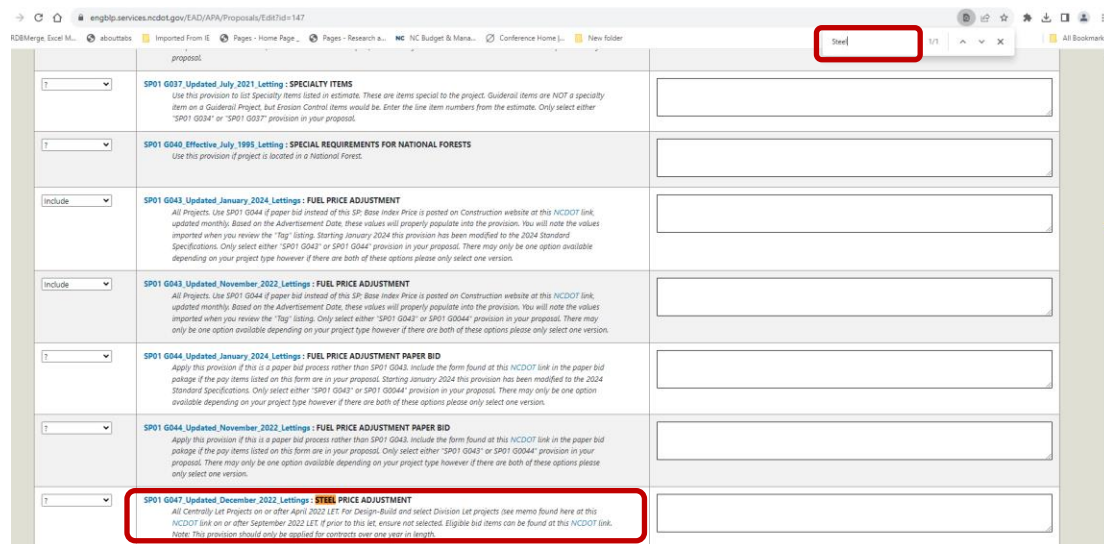
SP01 G000_Updated_July_1995_Letting : PROJECT SPECIAL PROVISIONS - General <small>All projects; Use this as starter for "General Section".</small>

You may see links to additional documents in the "Reason for Use" to provide further direction for your selection needs. You may also see more than one active provision ensure you select the correct version for your proposal.

<p>SP01 G043_Updated_January_2024_Lettings : FUEL PRICE ADJUSTMENT</p> <p>All Projects. Use SP01 G044 if paper bid instead of this SP; Base Index Price is posted on Construction website at this NCDOT link, updated monthly. Based on the Advertisement Date, these values will properly populate into the provision. You will note the values imported when you review the "Tag" listing. Starting January 2024 this provision has been modified to the 2024 Standard Specifications. Only select either "SP01 G043" or SP01 G044" provision in your proposal. There may only be one option available depending on your project type however if there are both of these options please only select one version.</p>
<p>SP01 G043_Updated_November_2022_Lettings : FUEL PRICE ADJUSTMENT</p> <p>All Projects. Use SP01 G044 if paper bid instead of this SP; Base Index Price is posted on Construction website at this NCDOT link, updated monthly. Based on the Advertisement Date, these values will properly populate into the provision. You will note the values imported when you review the "Tag" listing. Only select either "SP01 G043" or SP01 G044" provision in your proposal. There may only be one option available depending on your project type however if there are both of these options please only select one version.</p>
<p>SP01 G044_Updated_January_2024_Lettings : FUEL PRICE ADJUSTMENT PAPER BID</p> <p>Apply this provision if this is a paper bid process rather than SP01 G043. Include the form found at this NCDOT link in the paper bid package if the pay items listed on this form are in your proposal. Starting January 2024 this provision has been modified to the 2024 Standard Specifications. Only select either "SP01 G043" or SP01 G044" provision in your proposal. There may only be one option available depending on your project type however if there are both of these options please only select one version.</p>
<p>SP01 G044_Updated_November_2022_Lettings : FUEL PRICE ADJUSTMENT PAPER BID</p> <p>Apply this provision if this is a paper bid process rather than SP01 G043. Include the form found at this NCDOT link in the paper bid package if the pay items listed on this form are in your proposal. Only select either "SP01 G043" or SP01 G044" provision in your proposal. There may only be one option available depending on your project type however if there are both of these options please only select one version.</p>

"Notes" filed will allow you at the provision level to create any notes. You may want to note who and when you made the decision to include or note, why you decided to include it, perhaps you are missing information and you may want to note who is expected to provide it to you to make a proper decision. This note field is what is valuable to you and your team during proposal development, or for future reference. As a reminder at the provision or overall proposal level notes can be edited by those with "edit" and "view" access authority.

Keep in mind that this list of provisions is searchable. Select "Ctrl"+"F", then key the topic of interest, hit "Enter" and you can see the word is highlighted by the provisions that have that key word searched for. Below "steel" is searched.



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If you have view only rights, you will note the selection options are shaded where you do not have rights. As you can see below I can't change the Proposal Stage, or if I should include or not the provision, but I can add notes at the top and at the provision level.

Include	Special Provision	Notes
<input type="checkbox"/>	A 01C, Updated, June, 2023, Letting : Cover for Division Let (no SBE) <small>Division projects non-SBE. Only select one provision that starts with the letter 'A'. There are 'A 01C, A 01D, A 01E, A 01F, A 01I, A 01J, A 01K, A 01L, A 01M, A 01N, A 01O, A 01P, A 01Q, A 01R, A 01S, A 01T, A 01U, A 01V, A 01W, A 01X, A 01Y, A 01Z' versions available depending on project type selected, there may only be one option available depending on your project type however if there are multiple please only select one version.</small>	<input type="text"/>

There are "Note" fields available at the provision level, as noted above in the last column. If slightly modifying the standard provision you would want to note you aren't selecting that provision but replacing that provision with the one inserted right below it.

Filling in Tags

Proposal Actions

- Edit Proposal
- Fill in Tags**
- Generate Proposal

APA. Projects Proposals

Print this page **Fill in Tags** Save

Edit Proposal Information for B_A

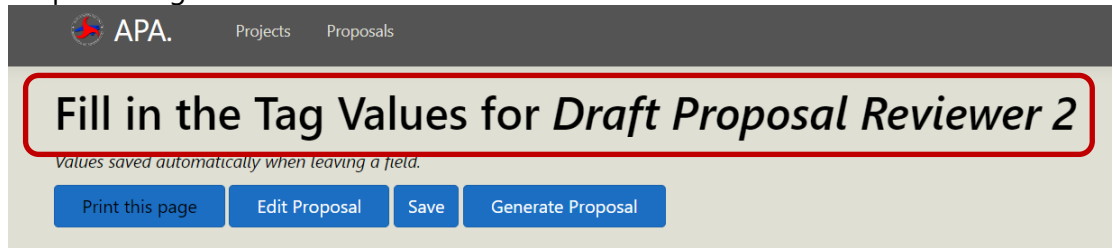
Edit Proposal **Fill in Tags**

Generate Final Proposal Word Document

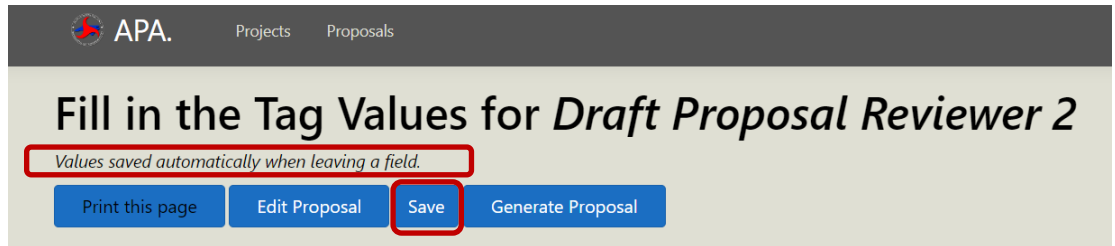
This button will provide you all input fields required for the proposals you selected. It can be found on the Proposals page, Edit Proposal, and Generate Proposal Page. Again, not all proposals have input fields, and the ones that do are drawn from inputs you already provided when you developed the project, the set-up of your group, or are automatically generated based on the advertisement date, while others will have to be populated on a provision basis.

After selecting "Fill in Tags" you will enter the "Fill in Tags" landing page.

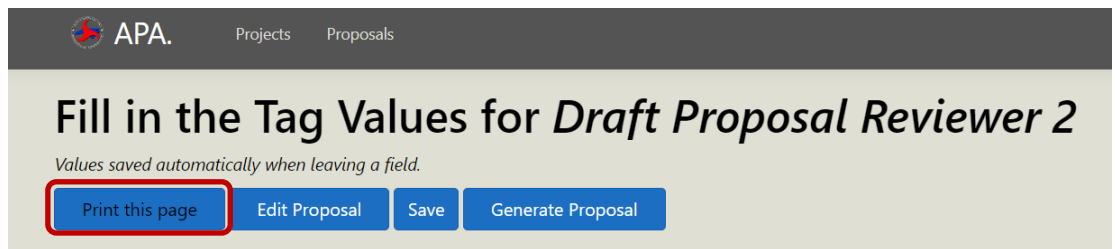
You will see at the top it will say "Fill in Tag Values for" followed by the Proposal Stage value.



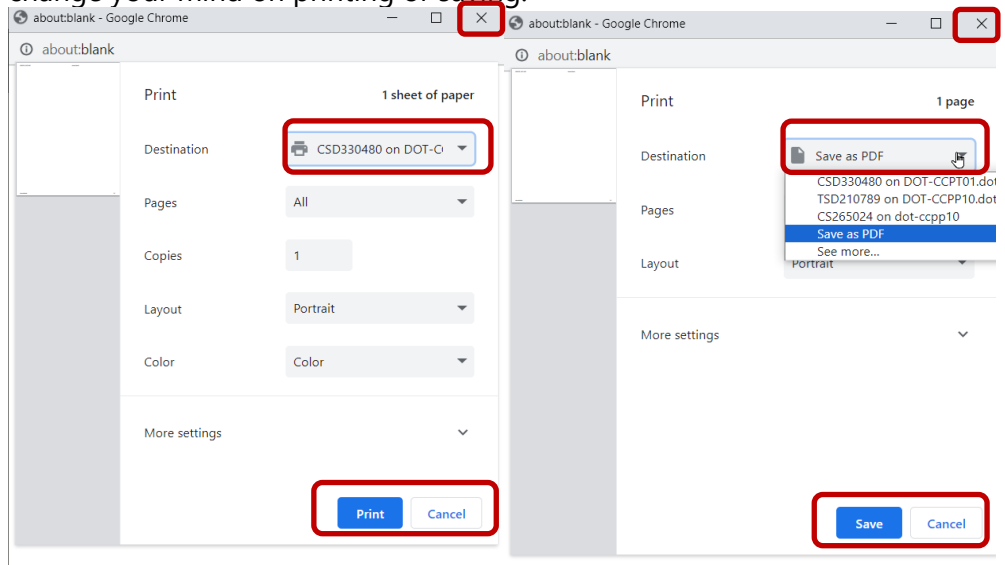
There is a note "Values saved automatically when leaving a field" however there is also a "Save" button for use.



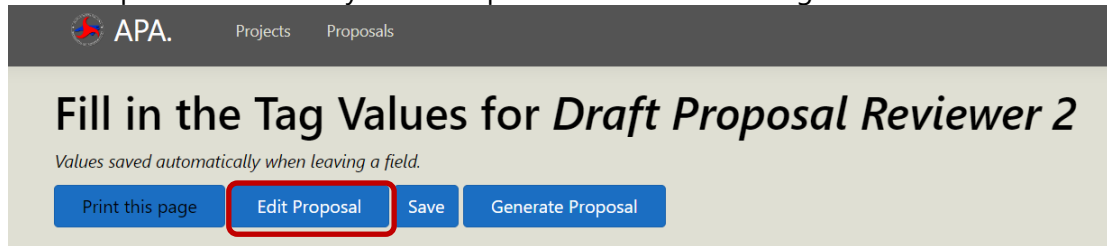
This page also has an option to print or save this page, which operates the same way as "Print this page" on the "Edit Proposal" page



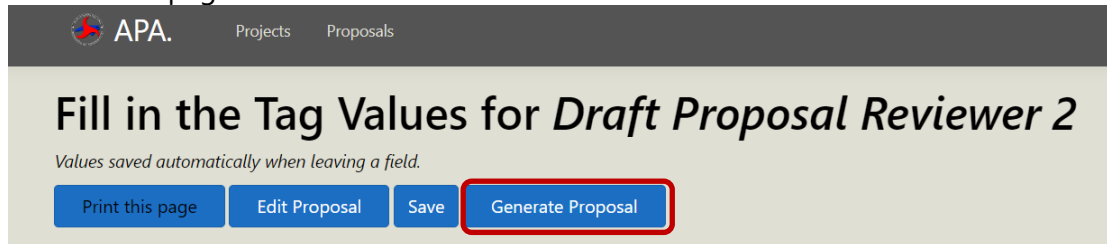
You can "Save as PDF", change to printer of interest or cancel or "x" to exit if change your mind on printing or saving.



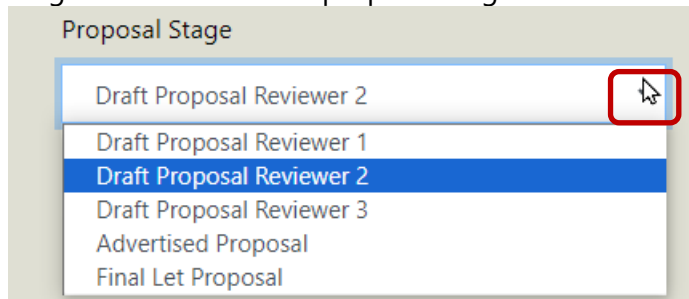
“Edit Proposal” will return you to the provision selection listing.



“Generate Proposal” will move you to the next step in the process, among other ways to get to that screen such as the Proposals landing page. We will discuss that page later in this document.



Below this information is some information about your proposal, to include “Project Description”, “Contract Number (or other unique ID for LGAs), TIP Number, WBS Number, Creation Date, Last Updated Date, and Proposal Stage. You can edit the proposal stage on this screen as well.



The requirements for this page are to populate values, and make sure the values automatically populated for your proposal are appropriate.

From Special Provision Document:	Field	Value
Generic	Location	<input type="text"/>
A 01C_Updated_June_2023_Letting Cover for Division Let (no SBE)	Proposal Type (ID/IQ PROPOSAL or PROPOSAL)	<input type="text"/>

Some of the input values will be restricted to an integer (where the field is restricted to a whole number), date (where the field is restricted to a calendar date), or currency input (where the input is still an integer but the output is in dollar format, those tag field descriptions will indicate no need to key the \$ in the field as a reminder) . Others are text fields where you have more input capability, you can add multiple paragraphs leaving a space between each

paragraph and if this requires a large amount of text you can expand the input field so you can see all text keyed. To expand the field hover in the bottom right hand corner, hold your left mouse button, and drag and drop to where you can see all text keyed. You will note in the example below I have two paragraph separated by a single space, this is exactly how the output will come across where this "Location" input is required if keyed in this fashion.

Generic	Location:	Paragraph 2 is this
Generic	Location:	Paragraph 1 is this. Paragraph 2 is this.

It is important you populate all fields provided, otherwise there will be a blank location where that input was located, however for tables in the provision you may leave those tag input fields blank and those rows in the table will be deleted (an example is Major Contract Items). These locations that may or may not be filled out will have text indicating "If not applicable, leave blank.", if you do not see text of this premise review your project for fields you should leave blank or populate. Ideally you would want to fill out all tags prior to generating your proposal, however if you need to view the proposal to date as an interim review step just be aware of those you did not key. There are "Generic" labeled provisions that go to multiple provisions and if they only are aligned with a single provision you will see the indicator for the

From Special Provision Document:	Field	Value
Generic	Location	<input type="text"/>
A 01C_Updated_June_2023_Letting Cover for Division Let (no SBI)	Proposal Type (ID/IQ PROPOSAL or PROPOSAL)	<input type="text"/>
From Special Provision Document:	Field	Value
SP01 G028_Updated_February_2002_Letting MAJOR CONTRACT ITEMS	Major Contract Item 3 (Note: Using Percent Run Estimate, begin by selecting items who's percentage is 10%+ of project total and working down to achieve a total of 20-30% (ideally) of the project. Lower percentage items, down to 3%, may be used. (DOT NOT USE: LUMP SUM ITEMS, WELDED STEEL PIPE, ASPHALT BINDER MIX ITEMS, DRILLED PIER and ALL PILE ITEMS, ASPHALT LEVELING COURSE, PRE-SPLITTING ROCK ITEMS, OR MILLING ASPHALT PAVEMENT. OKAY TO USE: ULTRA-THIN and APPLICATION MATERIAL, SPECIALTY ITEMS)) (Key the line number, 3 spaces, then the Description i.e. 176 Reinforced Concrete Deck Slab) IF NOT APPLICABLE TO HAVE A 3rd ITEM LEAVE BLANK.	<input type="text"/>

You will note there is a link to the provision so you can view it to better understand where the input value will reside in the text. By selecting the link, the file will go to your "C Drive" "Downloads" folder for review.

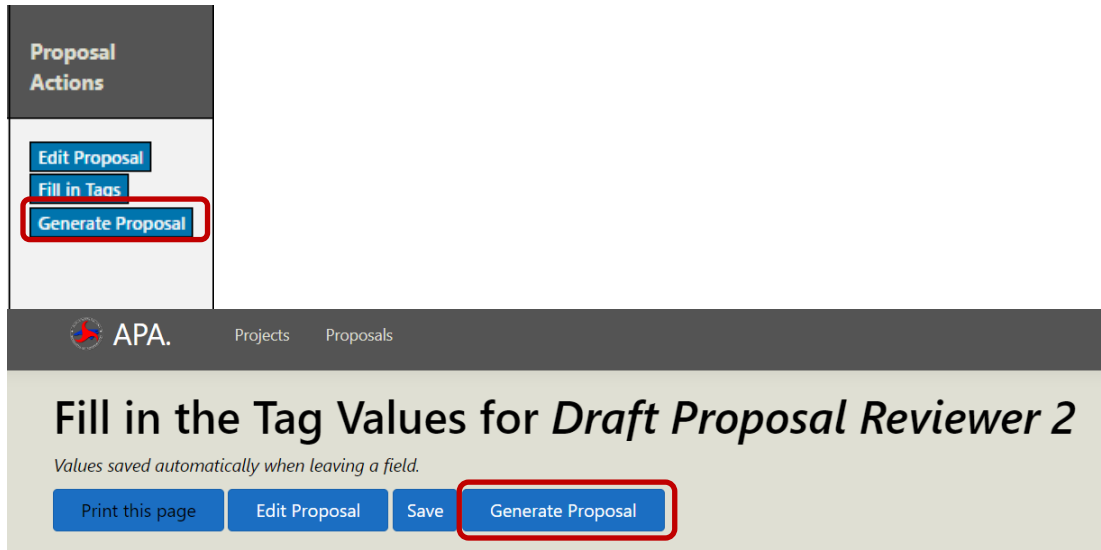
From Special Provision Document:	Field	Value
SP01 G028_Updated_February_2002_Letting MAJOR CONTRACT ITEMS	Major Contract Item 3 (Note: Using Percent Run Estimate, begin by selecting items who's percentage is 10%+ of project total and working down to achieve a total of 20-30% (ideally) of the project. Lower percentage items, down to 3%, may be used. (DOT NOT USE: LUMP SUM ITEMS, WELDED STEEL PIPE, ASPHALT BINDER MIX ITEMS, DRILLED PIER and ALL PILE ITEMS, ASPHALT LEVELING COURSE, PRE-SPLITTING ROCK ITEMS, OR MILLING ASPHALT PAVEMENT. OKAY TO USE: ULTRA-THIN and APPLICATION MATERIAL, SPECIALTY ITEMS)) (Key the line number, 3 spaces, then the Description i.e. 176 Reinforced Concrete Deck Slab) IF NOT APPLICABLE TO HAVE A 3rd ITEM LEAVE BLANK.	<input type="text"/>

If you open a provision file using the blue link available you will note there are indicators that start with "Ç". The C-cedilla, "Ç", is a Latin script letter which indicate the locations where the tag values you key will be placed in the proposal. If you leave the tag blank it will remove "Ç" value so ensure you only do not populate all tag values with the exception of those indicating an option to leave it blank in the field description. Below is an example of a place that has an indication of it being "blank".

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From Special Provision Document:	Field	Value
SP01 G028_Updated_February_2002_Letting MAJOR CONTRACT ITEMS	Major Contract Item 3 (Note: Using Percent Run Estimate, begin by selecting items who's percentage is 10% - of project total and working down to achieve a total of 20-30% (ideally) of the project. Lower percentage items, down to 3%, may be used. (DOT NOT USE: LUMP SUM ITEMS, WELDED STEEL PIPE, ASPHALT BINDER MIX ITEMS, DRILLED PIER and ALL PILE ITEMS, ASPHALT LEVELING COURSE, PRE-SPLITTING ROCK ITEMS, OR MILLING ASPHALT PAVEMENT. OKAY TO USE: ULTRA-THIN ASPHALT PAVEMENT.) IF NOT APPLICABLE TO HAVE A 3rd ITEM LEAVE BLANK.	<input type="text"/>

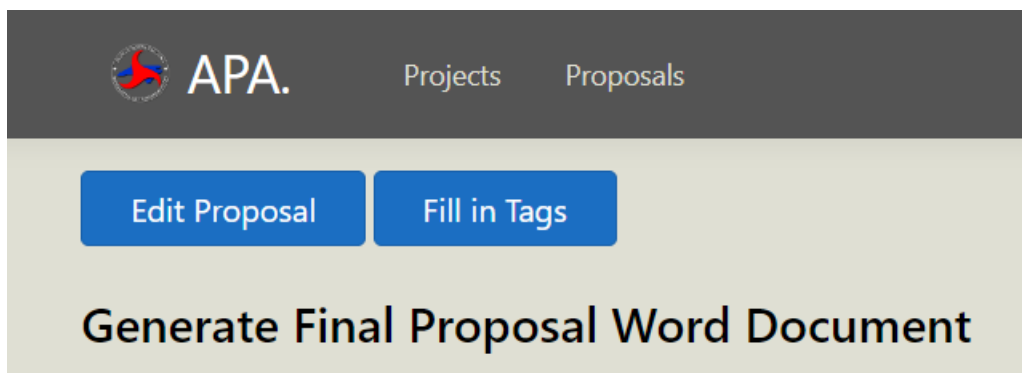
Generating the Proposal



The screenshot shows a sidebar on the left with the heading "Proposal Actions" and three buttons: "Edit Proposal", "Fill in Tags", and "Generate Proposal". The "Generate Proposal" button is highlighted with a red border. Below this is a navigation bar with the APA logo and "Projects Proposals" text. The main content area has the heading "Fill in the Tag Values for *Draft Proposal Reviewer 2*" and a sub-heading "Values saved automatically when leaving a field." Below this are four buttons: "Print this page", "Edit Proposal", "Save", and "Generate Proposal". The "Generate Proposal" button is highlighted with a red border.

This button will create a Word® document for you to edit. The headers, format, etc. have been enhanced to provide you a proposal that requires minor edits and a consistent product for NCDOT funded proposals. The output like all other items, when Generated will go to your "C Drive" and "Downloads" folder for relocating to an appropriate location. The "Generate Proposal" site will provide you the list of provisions you are including for one more quick review.

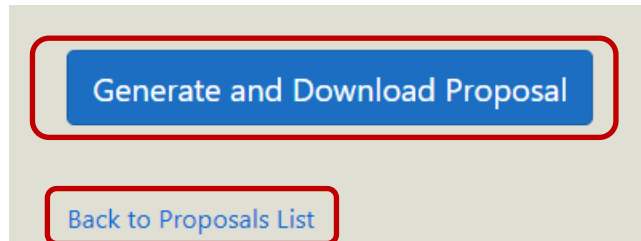
At the top of the page you will see an option to return to "Edit Proposal" and "Fill in Tags", followed by an indication that you are going to "Generate Final Proposal Word Document".



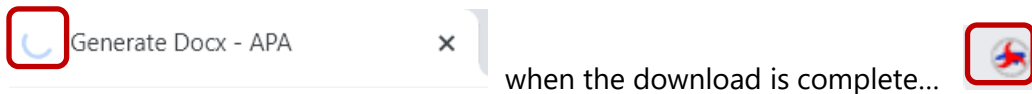
The screenshot shows a navigation bar with the APA logo and "Projects Proposals" text. Below this are two buttons: "Edit Proposal" and "Fill in Tags". Below these buttons is a large heading "Generate Final Proposal Word Document".

This is followed by information about the Proposal to include "Proposal Output Filename", "Name", "Proposal Stage" status, the "Note" field for the proposal overall, "Creation Date", "Last Updated Date", and "Project".

This is followed by "Proposal Provisions" which lists each provision you selected. After your review, select "Generate and Download Proposal", found at the bottom of this page. Along with a method to exit the proposal and return to the "Proposals" landing page.



You can tell "Generating" is occurring as the browser tab will show a circle with a line that rotates around that circle loading, when it stops and returns to the NCDOT seal the proposal is available on your "C Drive" "Downloads" folder. You may have a message in the upper right hand corner that asks if you want to open the downloaded file as well depending on your browser settings.

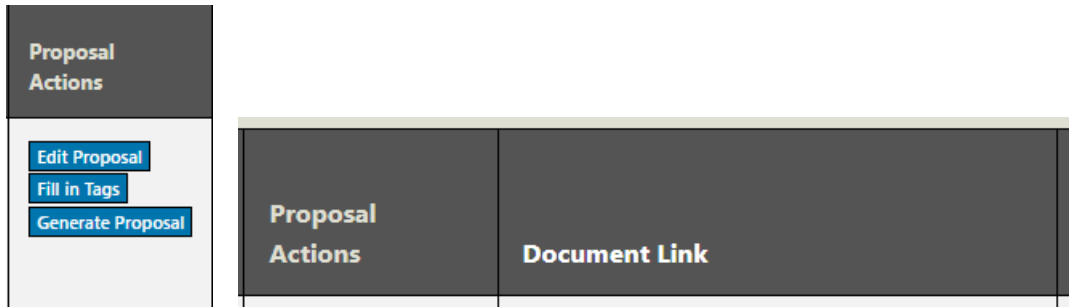


Also you will see a status bar, while the spiral icon is spinning at the top and it will disappear and the NCDOT seal will be displayed once completed as well.



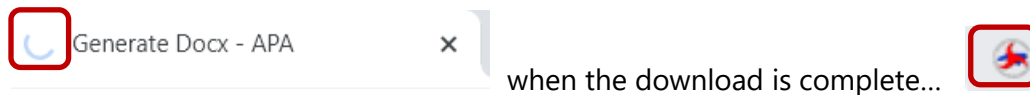
The file name for your Word document will be the combination of the Contract ID (or LGA unique ID), Tip No., and County. If you do not have a TIP number you can either replace that field with another identifier or leave it blank. You will find these values at the top of the pages of your proposal above each provision selected to exclude the cover sheets and Table of Content provisions.

One other way to Generate the Proposal are found on the Proposals page after you have generated at least 1 proposal. To the right of "Proposal Actions" There is "Document Link" column as shown below.



Like "Edit Proposal" only being in "Proposal Actions" until you start the provision selection process, this "Document Link" field is blank until you generate the proposal at least 1 time. After generating once, you will see a "Document Link" column with a word file instead of a blank field. By selecting this file, this generates the proposal as well and you will find the generated file in your "Downloads" folder.

Again you will see the icon change when you click on the file to regenerate it.



Also you will see a status bar, while the spiral icon is spinning at the top and it will disappear and the NCDOT seal will be displayed once completed as well.



If more than one Proposal is downloaded and remains in your Downloads folder it will be numbered with a "(#)" after the file name displayed in the "Document Link" column.

Inserting Project Specific Provisions

Prior to Generating your proposal you may have some provisions specific to your project that should not be in a unit specific sealed portion of your proposal, this system does provide you the capability to insert provisions into the proposal.

To do this first you need to go to the NCDOT Preconstruction site for your project.

The Preconstruction Website can be found on the Automated Proposal Application (APA) Home page under "Provision Links", this location also has links to the 2024 and 2018 Standard Specifications listing as well however APA stores both versions in its archives for reference via the links provided in APA provision and tag listings.

<https://connect.ncdot.gov/resources/Specifications/Pages/APA.aspx>

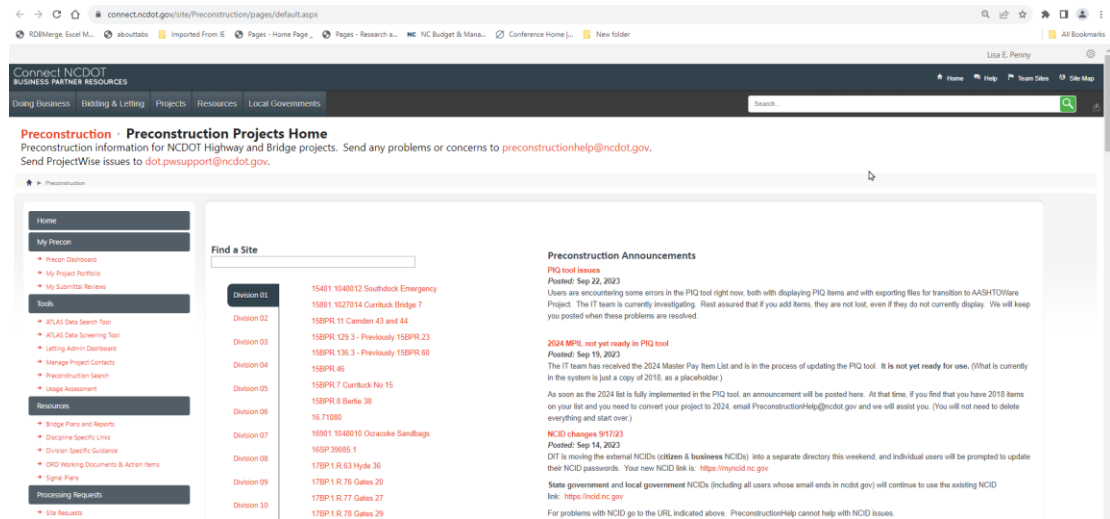
Provision Links

[2024 Standard Provision](#)
[2024 Standard Provision Page](#)

[2018 Standard Provisions](#)
[2018 Standard Provisions page](#)

[Preconstruction Project Provisions](#)
 Permissions required to access this site.

The "Preconstruction Project Provisions" link takes you to this website <https://connect.ncdot.gov/site/Preconstruction/pages/default.aspx>. If you do not have access to this site, please contact specs@ncdot.gov



Use "Find a Site" to search for the WBS, TIP of interest or the Division links to find projects available for that Provision by scrolling through the list. If you do not find your project, it is acceptable for Local Government Agencies to add their projects to this site, it may be you only utilize the "Special Provisions" site from this listing for APA purposes, however.

When you enter the project, you will see the following initial project set-up listing.

Chapter 2: Using APA

Disciplines & Team Collaboration

- General
- Disciplines
- Collaboration
- LET Preparation
- Post LET
- ATLAS Tools

Select "LET Preparation", then "Special Provisions".

- LET Preparation

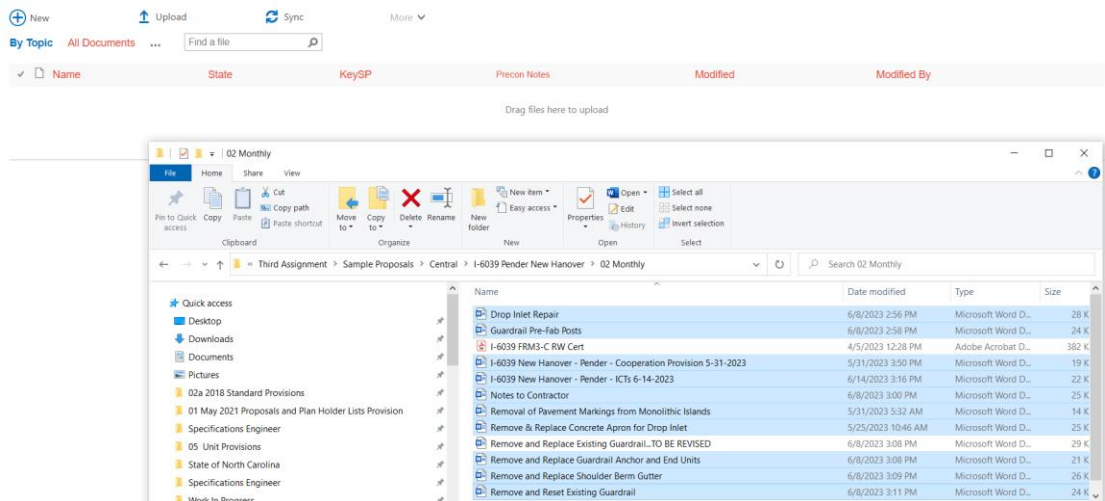
NOTICE: Design Bid Build projects will be locked at final turn in for plan checking and finalization. Contact finalplans@ncdot.gov (central let) or Division PM for changes while locked.

- [Final Plans \(0\)](#)
- [Final Plans Structures \(0\)](#)
- [Special Provisions \(0\)](#)

To load project specific provisions you have two options to complete that action.

Option 1:

Drag and drop or upload the provisions for that project to this site.



After this loads you will see them available for use.

SP Topic : (10)



Drop Inlet Repair ✳



Guardrail Pre-Fab Posts ✳



I-6039 New Hanover - Pender - Cooperation Provision 5-31-2023 ✳



I-6039 New Hanover - Pender - ICTs 6-14-2023 ✳



Notes to Contractor ✳



Removal of Pavement Markings from Monolithic Islands ✳



Remove & Replace Concrete Apron for Drop Inlet ✳



Remove and Replace Guardrail Anchor and End Units ✳

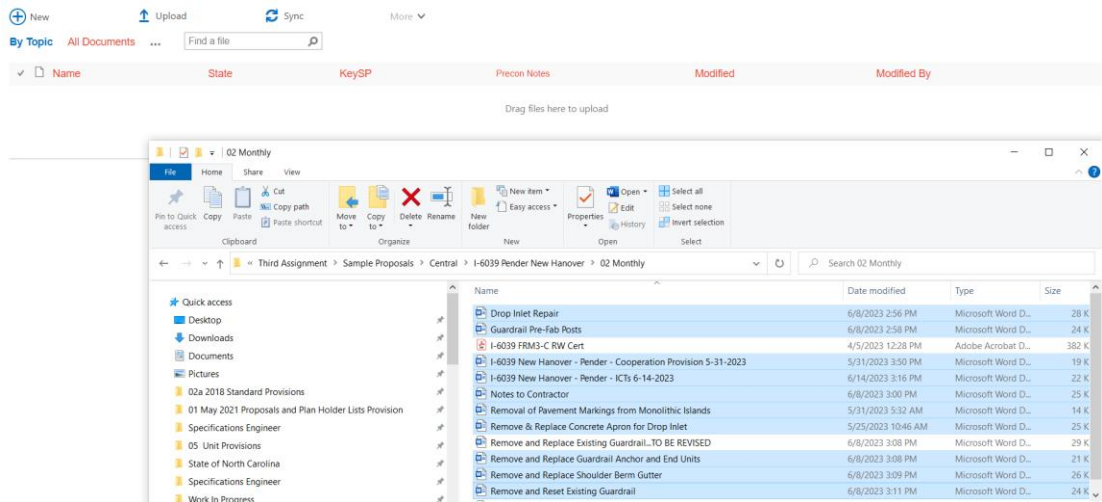


Remove and Replace Shoulder Berm Gutter ✳



Remove and Reset Existing Guardrail ✳

You have to fill out the properties of each provision inserted and check it in if you drag and drop them into the provision folder.



Chapter 2: Using APA

▲ SP Topic : (10)



Drop Inlet Repair ✱



Guardrail Pre-Fab Posts ✱



I-6039 New Hanover - Pender - Cooperation Provision 5-31-2023 ✱



I-6039 New Hanover - Pender - ICTs 6-14-2023 ✱



Notes to Contractor ✱



Removal of Pavement Markings from Monolithic Islands ✱



Remove & Replace Concrete Apron for Drop Inlet ✱



Remove and Replace Guardrail Anchor and End Units ✱



Remove and Replace Shoulder Berm Gutter ✱

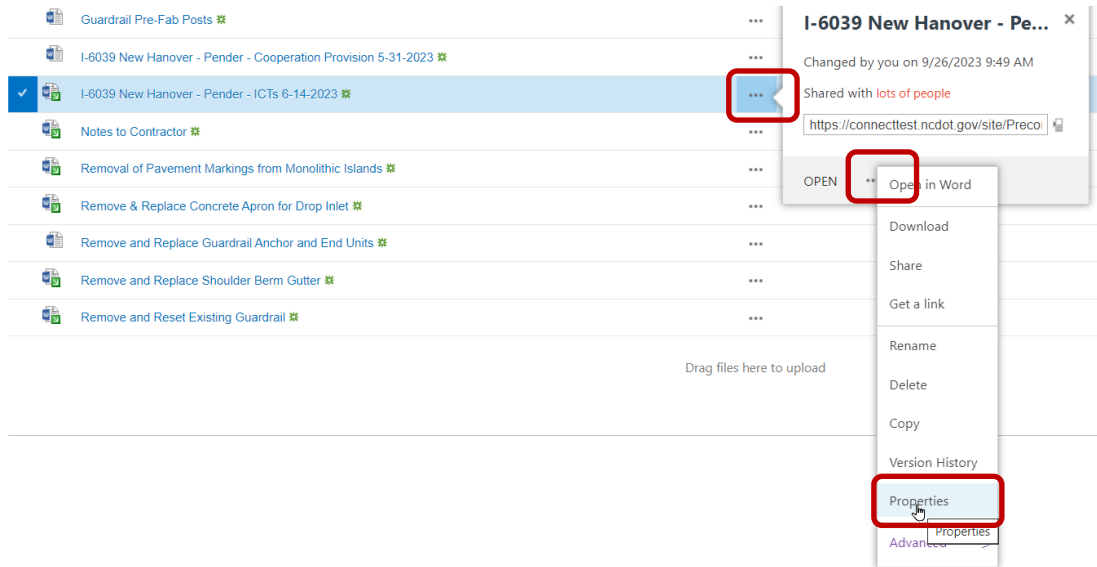


Remove and Reset Existing Guardrail ✱

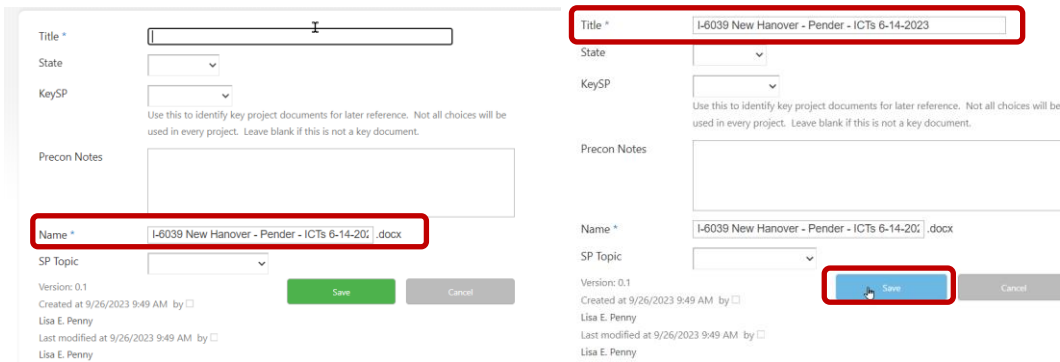
If you use this option you will need to ensure all the files dropped in are “checked in”, you will tell it is not checked by seeing the little arrow by the word icon.



For those instances, you will need to select the triple dot (...), then triple dot again (...), then Properties.



Copy "Name" to "Title" and "Save".



Then select the triple dot (...), then triple dot again (...), then Advanced, then "Check In".

Chapter 2: Using APA

The screenshot shows a document management interface. At the top, there are buttons for 'New', 'Upload', 'Sync', and 'More'. Below these is a search bar and a 'SAVE THIS VIEW' button. The main area is a table of documents with columns for 'Name', 'State', 'KeySP', 'Precon Notes', and 'Modified'. The document 'I-6039 New Hanover - Pender - ICTs 6-14-2023' is selected. A context menu is open over this document, showing options like 'OPEN', 'Open in Word', 'Download', 'Share', 'Get a link', 'Rename', 'Delete', 'Copy', 'Version History', 'Properties', and 'Advanced'. The 'Check In' option is highlighted with a red box. A secondary menu is also visible, showing options like 'Shared With', 'Compliance Details', 'Check In', 'Workflow history', 'Schedule Workflows', 'Follow', 'Discard Check Out', and 'Workflows'.

Then select "Ok"

Retain Check Out

Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.

Retain your check out after checking in?

Yes No

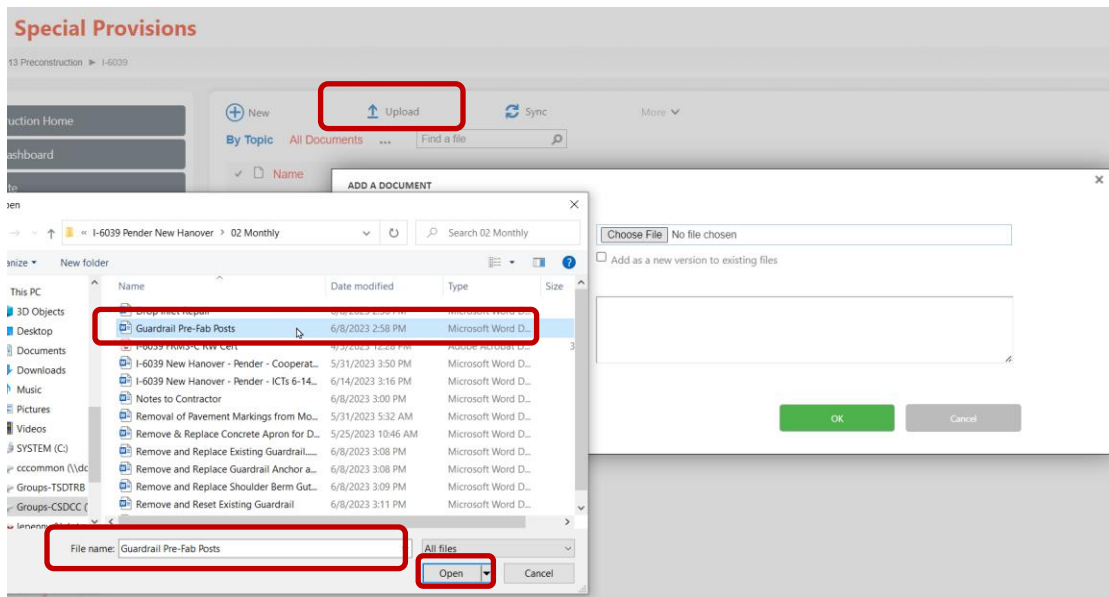
Comments

Type comments describing what has changed in this version.

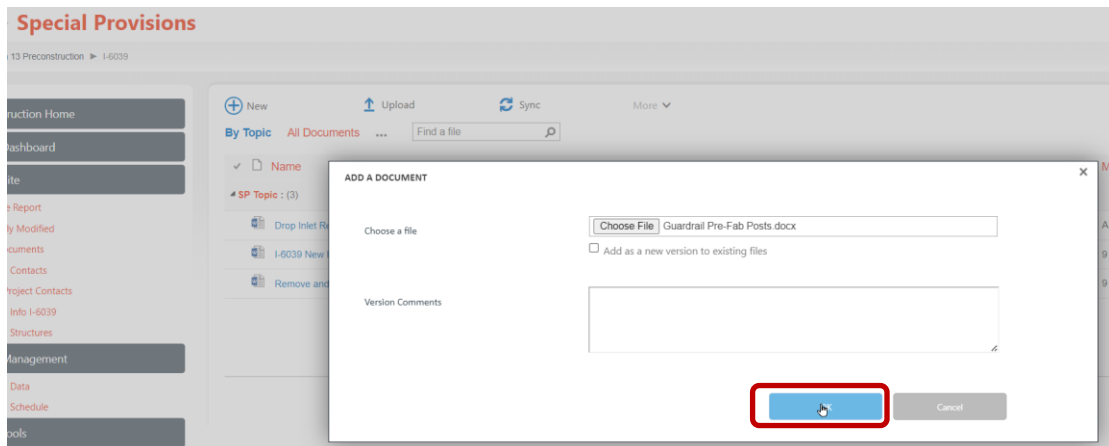
Comments:

Option 2:

The alternative is, "Upload", "Choose File", select your file of interest", select "Open".



Select "Ok".



Then copy "Name" to "Title" field and "Check In". Those are the only required fields.

Chapter 2: Using APA

ADD A DOCUMENT

EDIT

Check In Cancel Paste Copy Delete Item

Commit Clipboard Actions

i The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

Title *

State

KeySP

Use this to identify key project documents for later reference. Not all choices will be used in every project. Leave blank if this is not a key document.

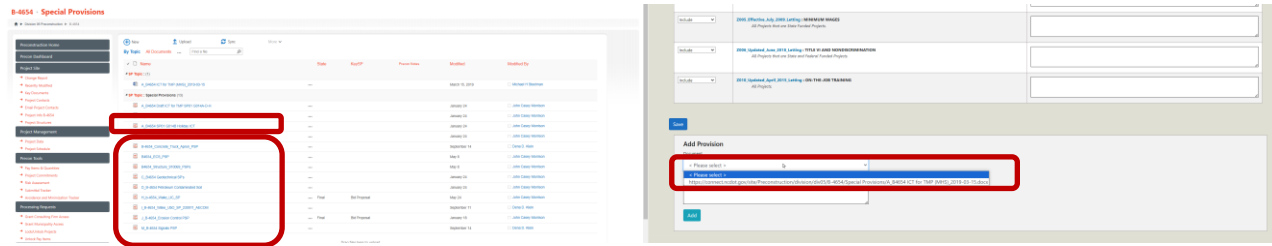
Precon Notes

Name * .docx

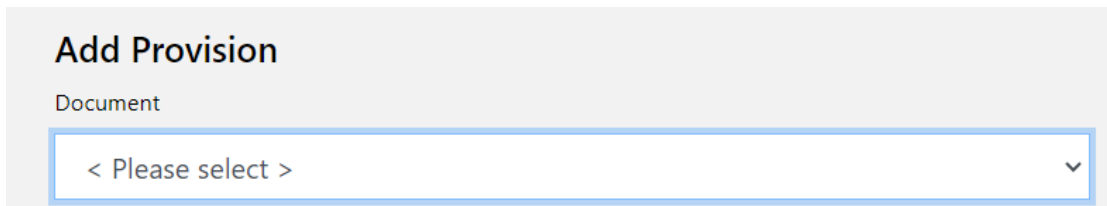
SP Topic

Version: 0.1
Created at 9/26/2023 9:46 AM by
Lisa E. Penny
Last modified at 9/26/2023 9:46 AM by
Lisa E. Penny

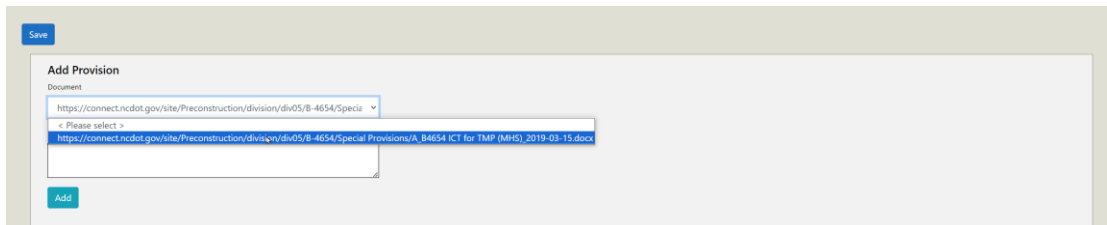
After you complete this action, return to your proposal for this project. Now that they are on this site, they will be displayed at the bottom of your "Edit Proposal" page for your project proposal. If PDF files are on this site, they will not be an option to insert, only Word files will be allowed for insertion. Bundle the other required sealed provisions in a DocuSigned document, this system will not be able to manage those other portions. In the example below, there is one word file, thus only one word file shows up on the "Add Provisions" listing. The PDF's in the larger box on the left are segments of the proposal that would be downloaded and DocuSigned in the appropriate order. You may find PDF's that should be Word files and included, download convert to word and reupload for it to be displayed on the listing or ask for the word file to be posted. Project provisions should be created using the template files and instructions.



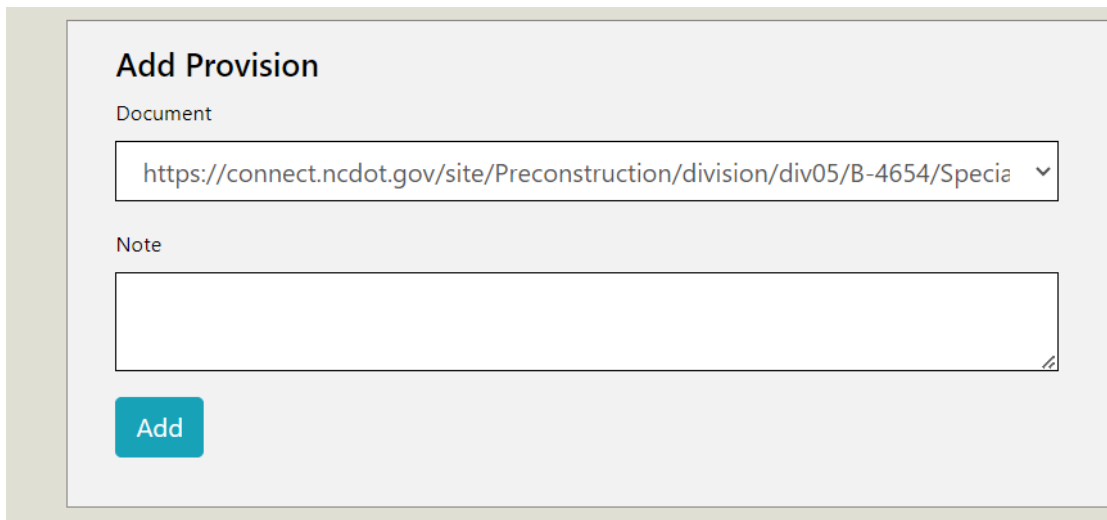
This is an example of an “Edit Proposals” page, following the list of provisions and the save icon you will have different views. If you have a word file in this folder structure archive and it is not already added to the proposal then you will see “Add Provision”



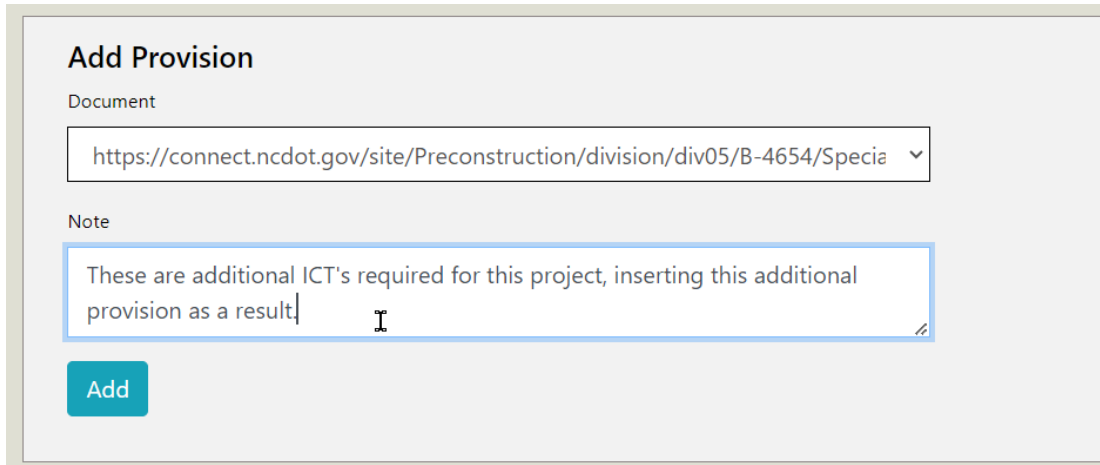
By selecting the error you will see the list of provisions that need inserted, followed by a note field and “Add” button. There could be one or multiple on the Preconstruction site for this project. This example there is only 1 word file available.



You select the project specific provision you need to insert.



You can add “Notes”.



Add Provision

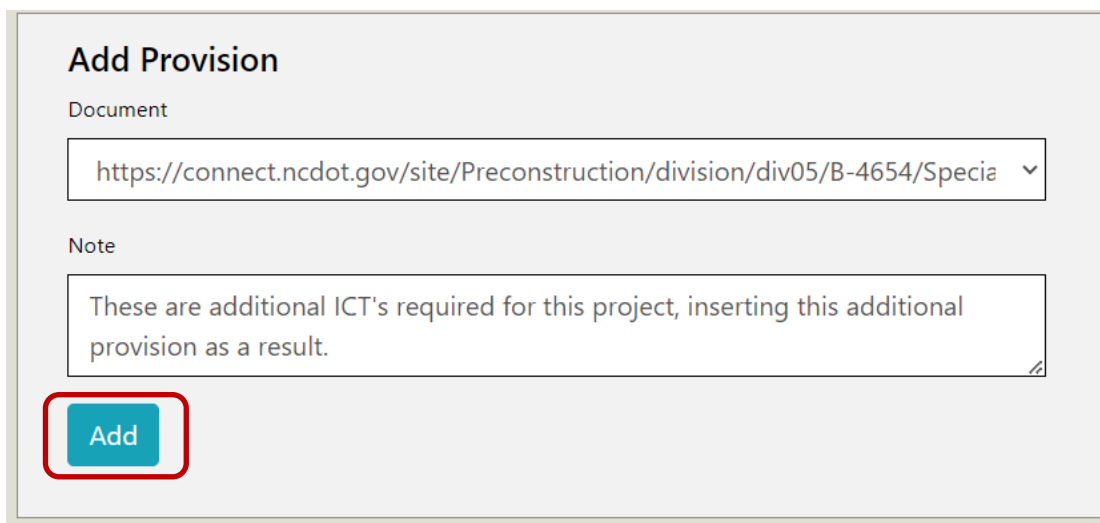
Document

▾

Note

Add

Then select "Add".



Add Provision

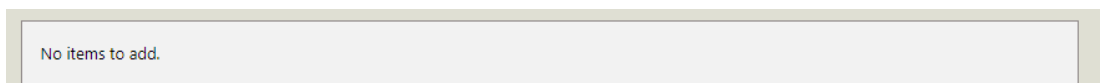
Document

▾

Note

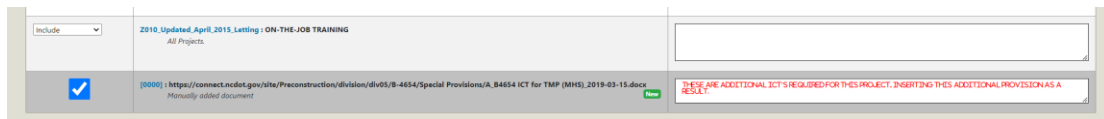
Add

If there is only one provision listed the information available below "Save" will change to what is shown below or it will remain the same with one less provision to insert in the drop down list.

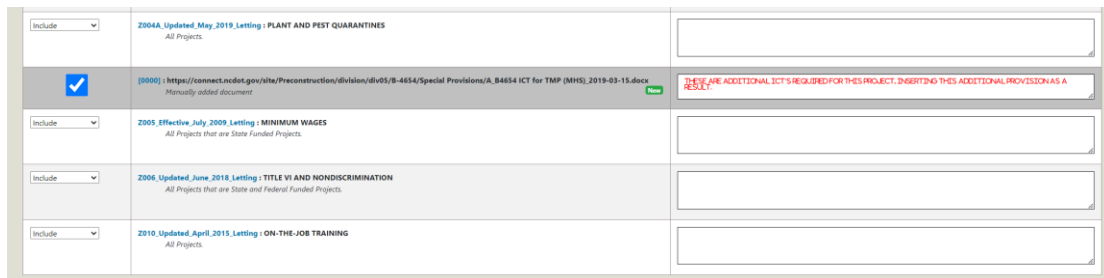


No items to add.

You will see when this provision was inserted it has a darker background. You can drag and drop the provision where is most appropriate sequence wise. Optimally following the order of the Standard Specifications, where typically these provisions will be in the Roadway section of the proposal (SP## R###) portion. For Design Build project types (Alternate Delivery, Turnpike, or Division working on one of these project types), Roadway section provisions are (DB## R###).



Drag and drop the provision to the appropriate location. When you release it will settle in between provisions as noted in the small movement of the provision below.



Updates

The Automated Proposal Application (APA) will be updated by the Specification Engineer in the Contract Standards and Development Unit. Your suggestions for updates/improvements are encouraged. Please send to specs@ncdot.gov.

If the project moves to a later letting date, ensure you modify the Projects page accordingly. You will need to ensure you have the correct version of the provisions selected. If the let date is past the provisions will be marked as “inactive” and only the “active” provisions will be displayed. For historical projects and proposals (past the Letting Date) if a provision is selected as “Include” it will be retained to link to the historical provision even if “inactive” so you can view an historical proposal for reference as needed. Use the contract number, WBS, TIP, or Description to search for the project or proposal. The last changes made will be available for further update.

Note that the provisions and line up sheet are typically updated in the third week of the month approximately two months before the let date when the approved provisions become effective. This is done to allow one month to assemble the proposal and one month to advertise the proposal. Provisions, lineup sheets and the website updates typically correspond with the provision distribution email sent to each Division by the Specifications Engineer.

Chapter 3:

APA Proposal Output

Topics you will learn in this chapter:

- ✓ Create Proposal and Final Review.
- ✓ Table of Contents
- ✓ APA Proposal Product.

Create Proposal and Final Review

The Automated Proposal Application, if used as intended, minimizes your changes required after you generate the proposal. Key items to remember include:

Use the APA templates and Provisions Writers' Guide provided on the [APA landing page](#) to create those provisions that insert into the General Provisions, Roadway Provisions, or Project Standard Special Provisions sections of the Proposal. This is to ensure the Table of Contents and like structure of provision is applied to those special provisions needed for your project.

For additional or modified provisions, using the templates of course, insert them by using the "Preconstruction" website placing them as word files in the Special Provisions location for your project. If the "Preconstruction" website is locked down, [open a ticket](#) to insert your provision onto the website, if timing does not allow for this please complete the ticket and insert where needed regardless, but also manually insert that provision into your proposal. Upon entering the "open a ticket" SharePoint Services path, you select "modify", copy and paste the Special Provisions Path

SharePoint Services

Request to create a SharePoint website. Request to modify an existing SharePoint website. Request to remove/delete a SharePoint site no longer in use.

Service Related Information

*Select service

Create Modify

*SharePoint site URL

e.g. inside.ncdot.gov, www.ncdot.gov

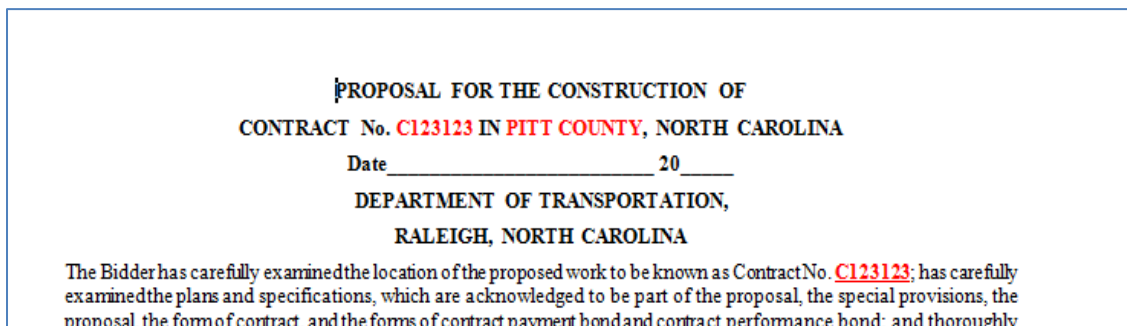
Description/Additional Comments

Additional comments

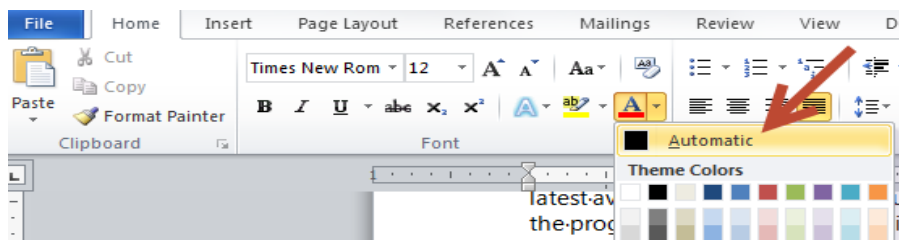
 Add attachments

If you ensure above is followed, there are minimal steps required after you generate your proposal, first finalize all red text (tags) are appropriate throughout, then modify the text removing the red format as noted below.

APA creates a Word document in your "C Drive" "Downloads" folder. This document uses **Black** text to denote the standard information within the proposal. **Red** text denotes user inputs including user inputted project special provisions, i.e., the provisions that you added using the "Click Here to Add Additional Project Specific Provisions".



After you have reviewed your proposal, press "Control" and "A" to select all text. On the Home tab of Word, under the "Font" ribbon, select "Automatic" on the font color symbol after you have completed your review.



Chapter 3: APA Proposal

There are a few more steps if manually inserting provision(s) after output versus using the Preconstruction website and that provision is needed in the Table of Contents.

Just copy one of the other Table of Contents rows, insert the copy and rename the Title and page number.

For any spacing changes that are done post proposal generation (ideally format the provision as described in the template instruction or report there is an issue with the standard provision by contacting specs@ncdot.gov). The Table of Contents can be highlighted then select "F9" to update it. However, the manually inserted table of content rows will not update with "F9", ensure if the manually inserted provisions shifted and if in the Table of Contents the page number is accurate before advertising.

In the example below only 1 provision was selected and thus if I move it, highlighting the rows and selecting F9 would modify it from G-4 to G-5 if I moved the title down one page. The manual inserted "NEW PROVISION" and "NEXT NEW PROVISION" would not update and would have to ensure that the page numbers are appropriate via manual inspection. Obviously these are not realistic titles of provisions, but it is to provide you an idea of how the BABA provision row was copied down two times and two provisions were inserted on two different pages of this document and how I would have to adjust the title to match that manual provision title as well as the page number versus highlight and F9 key selection. When highlighting you can see the "5" would change but the 6 and 7 would not, this will help you know which you have to manually adjust and which you do not have to manually adjust.

PROJECT SPECIAL PROVISIONS

BUILD AMERICA, BUY AMERICA (BABA):.....G-4

PROJECT SPECIAL PROVISIONS

BUILD AMERICA, BUY AMERICA (BABA): G-5
NEW PROVISION:..... G-6
NEXT NEW PROVISION: G-7

Table of Contents

As of late 2014, Raleigh uses chapter-type prefixes for each individual unit’s work in the Table of Content. These chapter letters were created to allow units to submit their sealed packages to the Contract Standards and Development Unit in DocuSign without having to “renumber” and break the seal.

The General and the Standard Special Provisions typically have each provision title listed in the Table of Contents. The other sections use a range of page numbers to indicate their location in the proposal. Provision sets provided by individual units may use the first page to list a table of contents for those unit provisions. That table of content is often used to sign and seal the provisions from that unit. Please use the templates provided for project special provisions that are inserted either in the General Section (ex. Need more than one of the same Intermediate Contract Time special provision), or the more typically applied Roadway Section project special provision template. The templates can be found in the APA and Project Special Provision Development Instructions on this website: <https://connect.ncdot.gov/resources/Specifications/Pages/APA.aspx>.

The Table of Contents applies the following before the page number in each section, where APA will manage the G-, R-, and SSP- portions of the proposal.

UNIT PROVISIONS	File Number	Page Number*
CONTRACT COVER SHEET	A1_	none
PROPOSAL COVER SHEET	A2_	none
PROPOSAL / CONTRACT BODY / PROJECT SPECIAL PROVISIONS / GENERAL	B_	G-
PROPOSAL / CONTRACT BODY / PROJECT SPECIAL PROVISIONS / ROADWAY	B_	R-
PROPOSAL / CONTRACT BODY / STANDARD SPECIAL PROVISIONS	B_	SSP-
GEO TECHNICAL	C_	GT-
GEOENVIRONMENTAL	D_	GV-
SIGNING	E_	SN-
PAVEMENT MARKING	EM_	PM-
TRAFFIC CONTROL	F_	TC-
LIGHTING	G_	LT-
UTILITY CONSTRUCTION	H_	UC-
UTILITIES BY OTHERS	I_	UBO-
EROSION CONTROL	J_	EC-
PLANTING / REFORESTATION	K_	PL-
REST AREA	L_	RA-
TRAFFIC SIGNALS	M_	TS-
INTELLIGENT TRANSPORTATION SYSTEMS	N_	ITS-
RAILROAD INSURANCE (Roadway)	O_	RI-
STR / CULVERTS / RR INS (Structures)	P_	ST-
RR INS (Structures) (when provided separately from Structures/Culverts only)	Q_	RR-
PERMITS / GREEN SHEET COMMITMENTS	R_	P-
SIGNATURE SHEETS & FORMS	S_	S-
BID/PAY ITEM SHEETS	T_	T-
DOT EXECUTION SHEET	U_	U-

* Page numbers should be the 18 font Times New Roman Bold Centered at the Top of the Header.
 TIP number goes on the Top Left Header and the County Name at the Top Right Header.
 All provisions must be DocuSigned except Erosion Control and Utilities by Others.

Note: ST- may not have Railroad Insurance as part of the insert, So there will be ST- or ST- and RR- depending on how it is provided.

APA Proposal Product

NCDOT has provided this tool for NCDOT state and federally funded projects to create your proposal. It will ensure accuracy in using the proper provision available and consistency for bidders ease of review. There may be a legal review required for changing the process to align with this system when put in use or manual processes required on top of what has been described to align with those requirements if not approved locally.

To ensure minimal requirements outside of this system, we had representatives from NCDOT, Cities, Municipalities, and PEF Contractors proposal developers and those that support the proper execution of a proposal for a project involved in system development.

This system has been developed for *2024 Standard Specifications* and subsequent versions of the *Standard Specifications*. Any questions please contact specs@ncdot.gov.