NC Department of Transportation

Contract Standards & Development

Division Letting Administration

User Guide

Table of Contents

Chapter 1 Applications

This User Guide will cover all steps in the Letting process and the applications/tools you will need to complete them. This first chapter will briefly explain each so that you will have a clearer understanding of what you need.

These are:

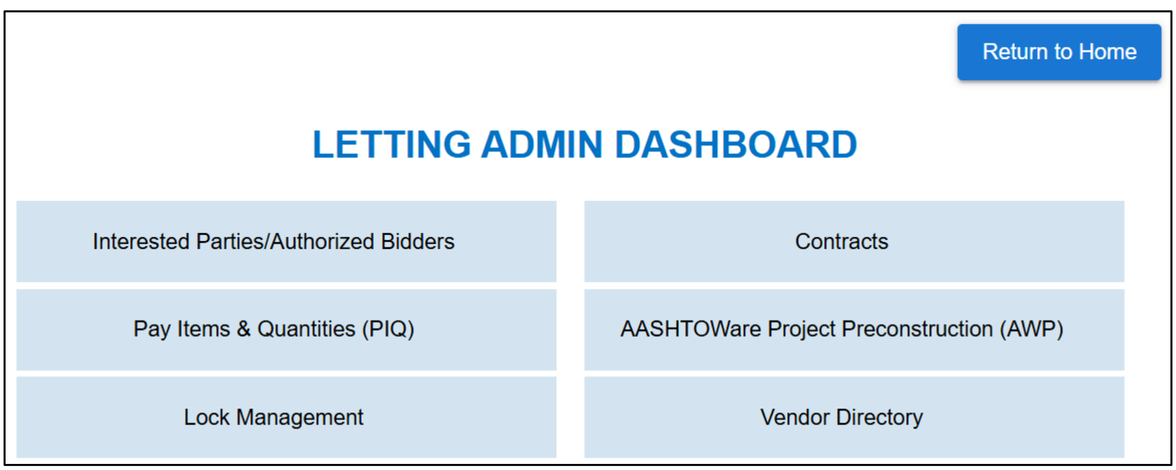
- The Letting Admin Dashboard
- AASHTOWare Project Preconstruction (AWP)
- AASHTOWare Project Bids Entry
- Bid Express (BIDX)

The Letting Admin Dashboard

The **Letting Admin Dashboard** provides a central location to access all systems required in the Letting Process.

The dashboard can be found on the NCDOT Preconstruction Projects Home page.

Step	Action	Result
1	In the address bar of your web browser, type HTTPS://CONNECT.NCDOT.GOV/SITE/PRECONSTRUCTION/PAGES/LADM.ASPX# and press Enter.	The **Letting Admin Dashboard** page will appear.



(*Letting Admin Dashboard Page*)

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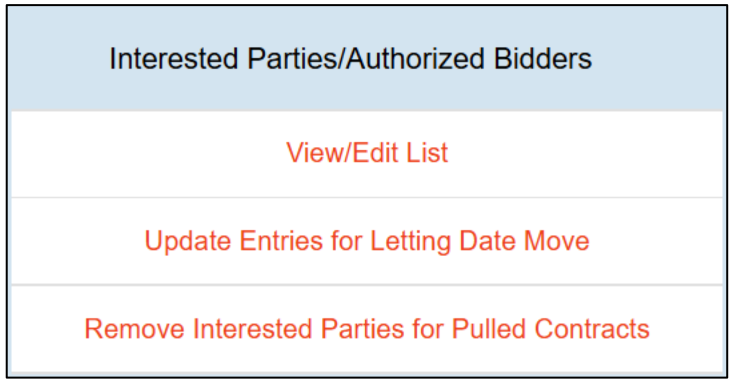
The Letting Admin Dashboard

(continued)

You will have the same access that you have been assigned in **AASHTOWare Project Bids Entry**. Based on your level of access, some buttons may not be visible to you.



Interested Parties / Authorized Bidders

From the ***View/Edit List*** link, you can add firms to the list of Interested Parties. You will also be able to Export this form to Excel or Generate the BIDX file here.

The ***Update Entries for Letting Date Move*** link is provided because if you move a contract to a different letting (in AWP), you will need to update the interested parties registered for that contract to connect them to the correct letting.

When the advertisement for a contract is pulled/withdrawn in AASHTOWare Project Preconstruction, the interested parties & authorized bidders list entries for that contract need to be deleted. The ***Remove Interested Parties for Pulled Contracts*** link will allow you to remove the Interested Parties from the contract(s).

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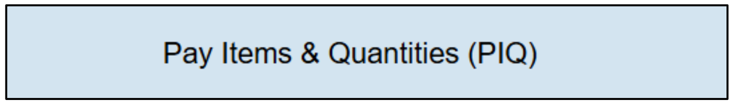
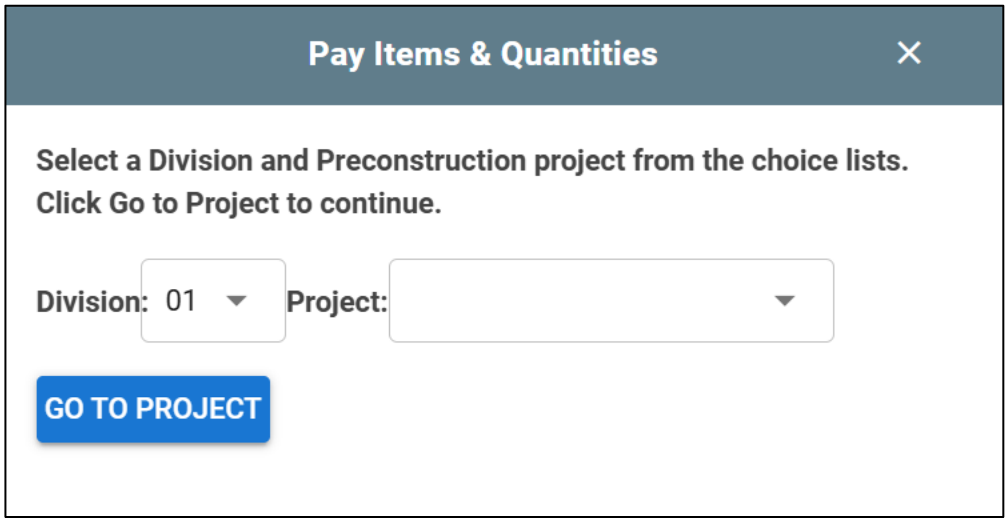
The Letting Admin Dashboard

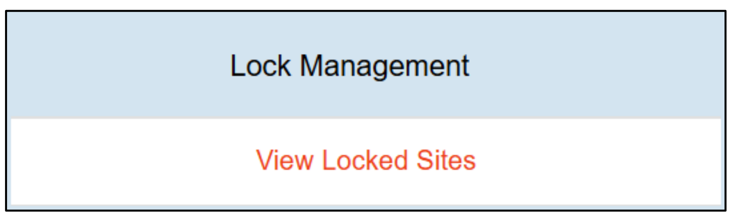
(continued)



Pay Items & Quantities (PIQ)

When you click this button, the following popup will appear.





Lock Management

This feature will allow you to submit a request to unlock a locked Preconstruction project site. You will be able to search for a project site by Project ID, TIP, WBS or Project Description.

Continued on Following Page

Contracts

This is where you will set up your contracts. You will be able to assign a contract number from the ***Assign Contract Number*** link.

From the ***Update Contract Associations for one contract*** link, you can update the projects or WBS values are associated with a contract.

The ***Split or Merge Contract*** link is provided so that you can move projects between two contracts if necessary.

The ***View Contracts and Associations*** link is provided so that you can view contracts and the WBS values associated with them. You will be able to add additional WBS numbers here.

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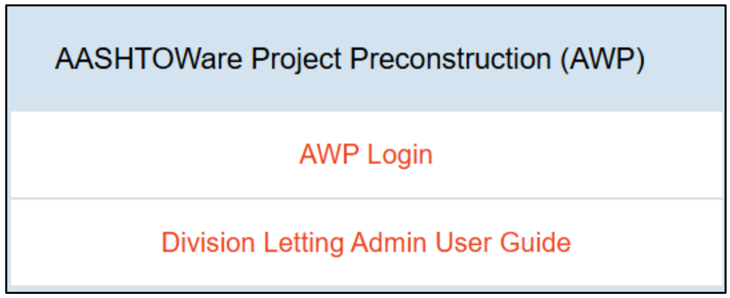
The Letting Admin Dashboard

(continued)



AASHTOWare Project Preconstruction (AWP)

This is a direct link to the login page for **AASHTOWare Project Preconstruction (AWP)**.

You will also be able to download a copy of this **User Guide** from here.

Vendor Directory

From here you can search the complete listing of certified and prequalified firms on the **Directory of Firms** web page.

AASHTOWare Project Preconstruction (AWP)

Logging In

Step	Action	Result
1	In the address bar of your web browser, type HTTPS://SPECS.SERVICES.NCDOT.GOV and press Enter.	The **AASHTOWare Project Login** window will appear.

(*AASHTOWare Project Login Window*)

🗁**NOTE:** You will use the same Username / Password combination that you use to log into the NCDOT Domain.

Step	Action	Result
2	Type the ***User ID*** you use to log on to your computer in the **USERNAME** field.	N/A
3	Type the ***Password*** you use to log on to your computer in the **PASSWORD** field.	N/A
4	Click the Log On button.	The **AASHTOWare Project Dashboard** window will appear.

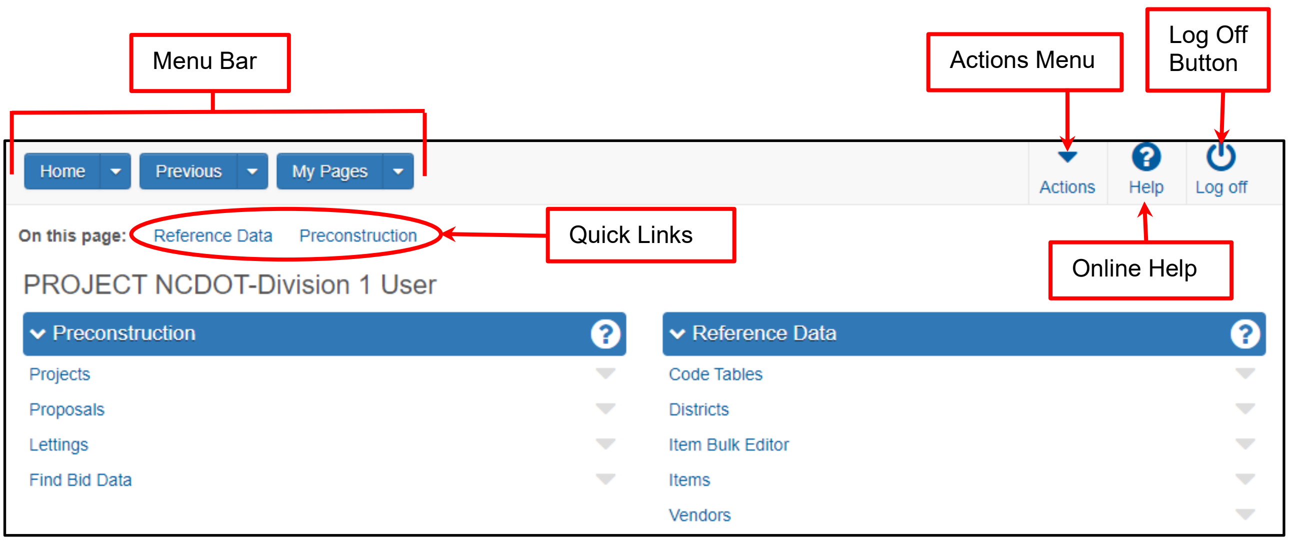
Continued on Following Page

AASHTOWare Project Preconstruction (AWP)

(continued)

🗁**NOTE:** If you have changed your password and are experiencing issues, try rebooting your machine to make sure your new password is synced across all systems.

This is the first window you'll see when you log into the AASHTOWare application.



(*AASHTOWare Project Dashboard*)

AASHTOWare Project Preconstruction (AWP)

(continued)

(Menu Bar)

The Menu Bar

Clicking this button will take you back to the ***AASHTOWare Project Dashboard***.

If you need to revisit any area that you have visited in your current session, click the down-arrow on the Previous Activity button to view your activity history. You'll be able to navigate directly to a page by clicking on its name in the list.

This button allows you to bookmark pages that you visit frequently.

To bookmark a page, see **Bookmarking a Page (My Pages)** on **Page 1-10**.

To remove a bookmarked page, see **Removing a Bookmark (My Pages)** on **Page 1-11**.

Actions Menu

The **Actions** menu is a list of shortcuts to functions that can be performed regardless of where you currently are in the system.

The options on this menu change depending on where you are in the system.

Online Help

Click this button to open **Online Help** for the application in a new browser window.

Log Off Button

Clicking this button will end the active session.

Continued on Following Page

AASHTOWare Project Preconstruction (AWP)

(continued)

Just beneath the Menu Bar are the **Quick Links**.

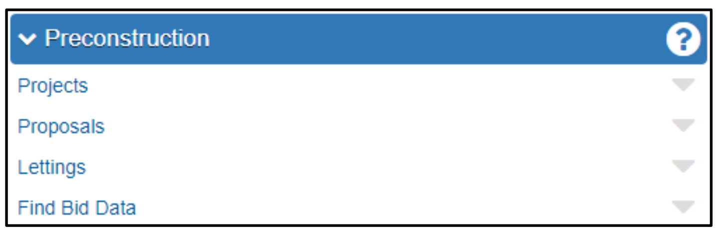
These are like breadcrumbs and map out where you are in the system.

(*Quick Links*)

🗁**NOTE:** Reference Data is available only on the Dashboard.
This data is read only.

On the **Heading Bar** of each section, there is an arrow.

When the heading is expanded to reveal the contents beneath, the arrow points downward . This is the default.



(*Preconstruction Menu Expanded*)

If you click anywhere on the **Heading Bar**, the section will be collapsed, the arrow will be pointing to the right , and the contents will be hidden.

(*Preconstruction Menu Collapsed*)

This is a toggle. Click anywhere on the **Heading Bar** once again to expand the list.

Bookmarking a Page (My Pages)

In AASHTOWare Project Entry, when you are on a page that you need to revisit frequently, you will be able to bookmark it.

After a page is bookmarked, you will be able to access it from the My Pages button at the top of the page.

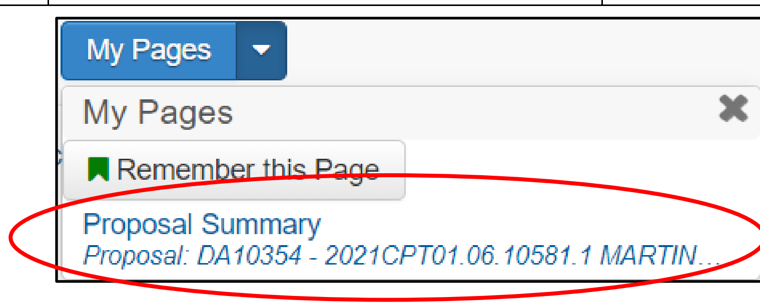
This can be done no matter where you are in the system.

When you are on the page you wish to bookmark:

Step	Action	Result
1	Click ***the down arrow*** on the right side of the **My Pages** button.	The **Remember this Page** button will appear in the menu.

(*My Pages button Drop-Down Menu*)

2	Click the **Remember this Page** button.	The ***name of the page you are on*** will appear in the list below the **Remember this Page** button.



(*My Pages button Drop-Down Menu with bookmarked page*)

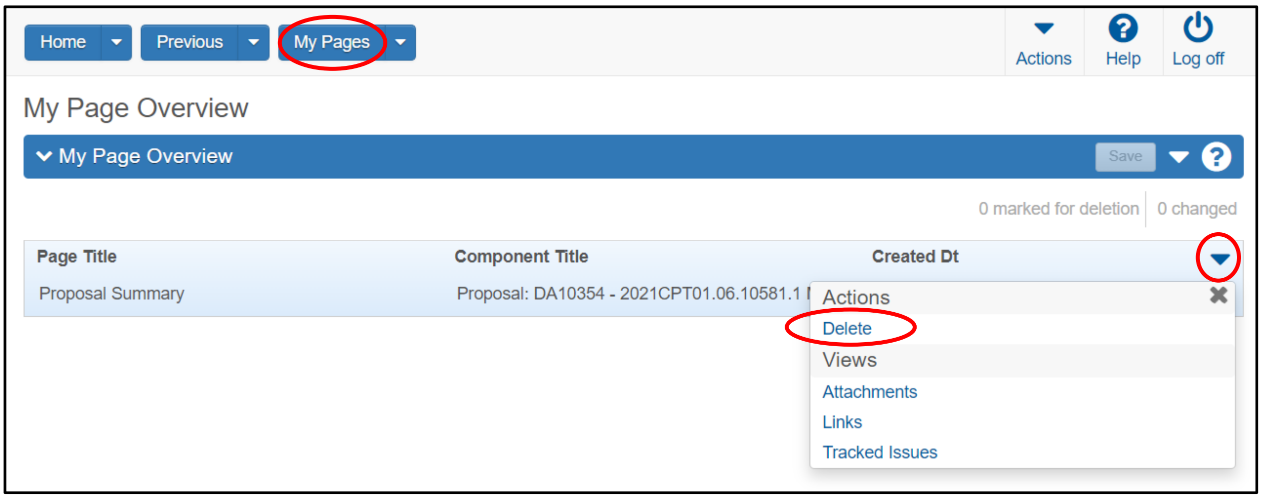
To go to this page again from anywhere in the system, you will be able to go here and click this link.

Removing a Bookmark (My Pages)

When you have bookmarked a page, but no longer need it, you will be able to remove it from the list of bookmarks.

This can be done no matter where you are in the system.

Step	Action	Result
1	Click the **My Pages** button. (Not the down arrow. The button itself)	The **My Page Overview** page will appear. All bookmarked pages will appear.



(*My Page Overview Page*)

2	Click the drop-down arrow at the right side of the ***page you wish to remove the bookmark from***.	A drop-down menu will appear.
3	Select **Delete** from the menu.	The drop-down arrow will change to an **undo arrow**. A ***There are unsaved changes*** message will appear above the **Header Bar**.

Continued on Following Page

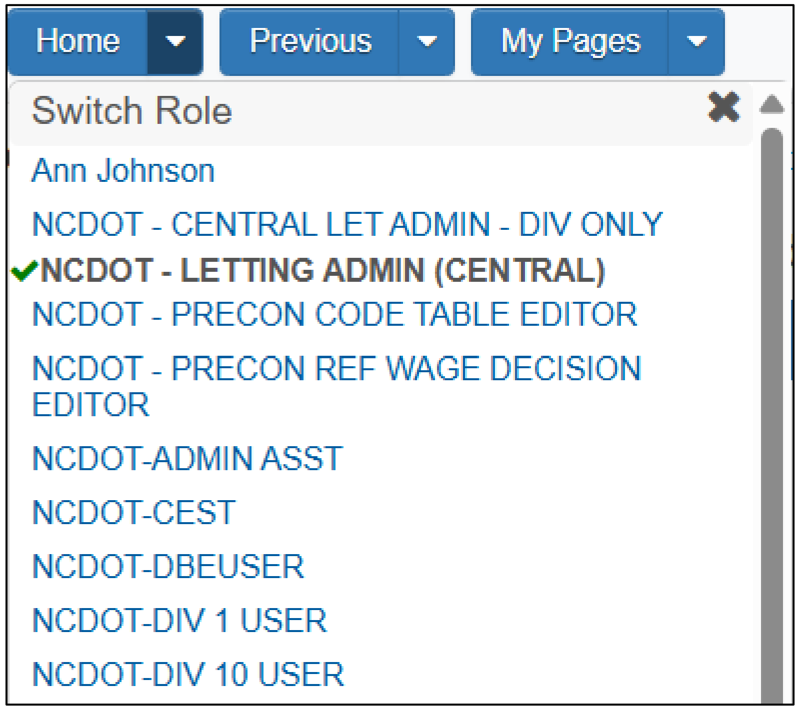
Removing a Bookmark (My Pages)

(continued)

4	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

The bookmark has been successfully removed.

Switching Between User Roles



From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	Click the down arrow on the right side of the **HOME** button.	A menu of all **User Roles** you have access to will appear. A green checkmark will appear next to your current role.
2	To change roles, select a different role from the list.	The green checkmark will now appear next to the newly selected role.

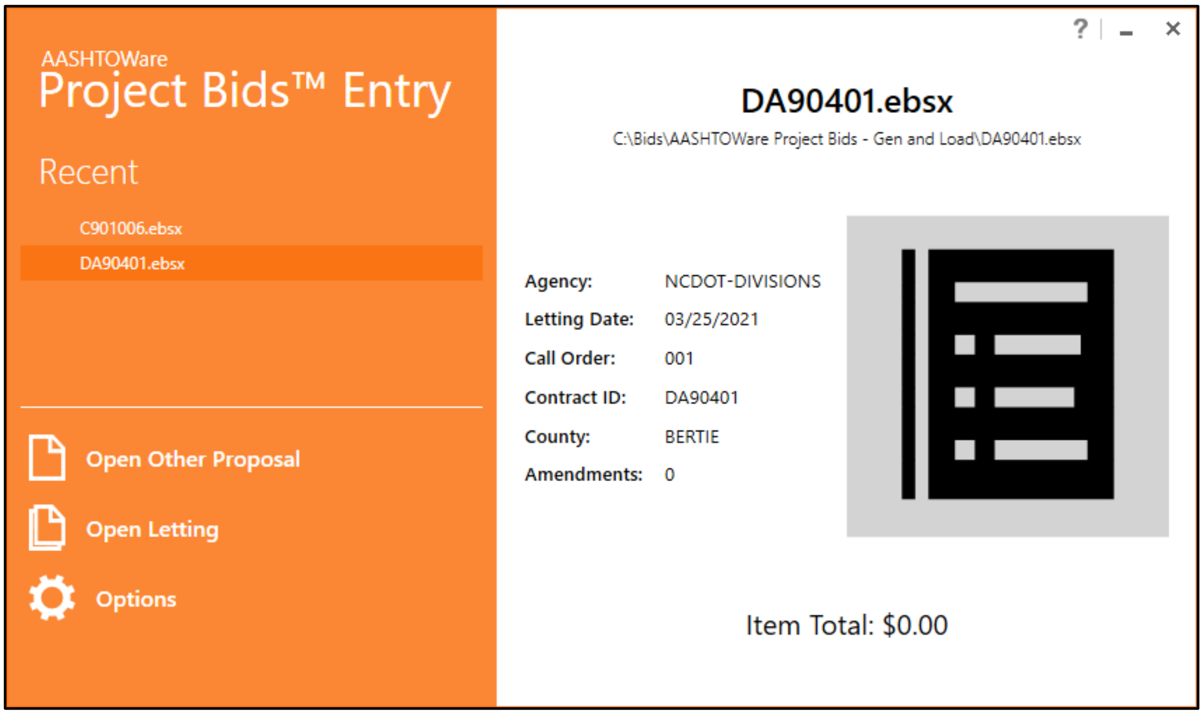
You now have all rights and permissions of this role and will be able to switch back and forth when needed.

AASHTOWare Project Bids Entry

The **Project Bids Entry** application is designed for use by the highway agency for entering paper-based bid data into the proper LOAD files.

Project Bids Entry automatically reads electronic proposal files (and amendments), then allows you to enter a bidder identification code and bid data for that bidder.

The results are stored directly in the Flat Bid File rather than in a Project Bid file.



(*Project Bids Entry Main Window*)

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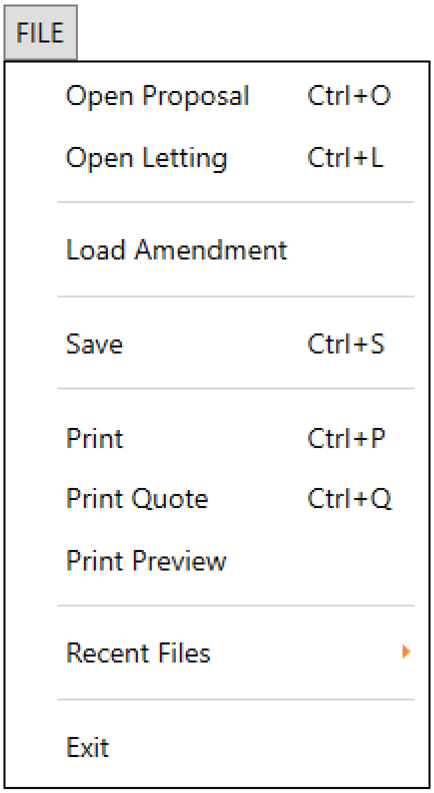
AASHTOWare Project Bids Entry

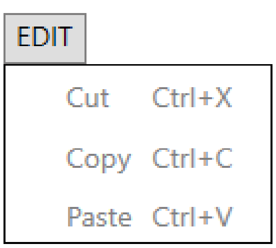
(continued)

The Menu Bar



The **File Drop-Down Menu** contains general file actions such as ***Open Proposal, Open Letting***, ***Save, Print Quote*** and ***Print***.

It also contains options to ***Load Amendment*** (Addendum) files, view one of several ***Recent Files,*** and customize printing with ***Print Preview***. It also gives users an additional way to ***Exit*** the application.



The **Edit Drop-Down Menu** contains the general text-edit options ***Cut, Copy*** and ***Paste***.

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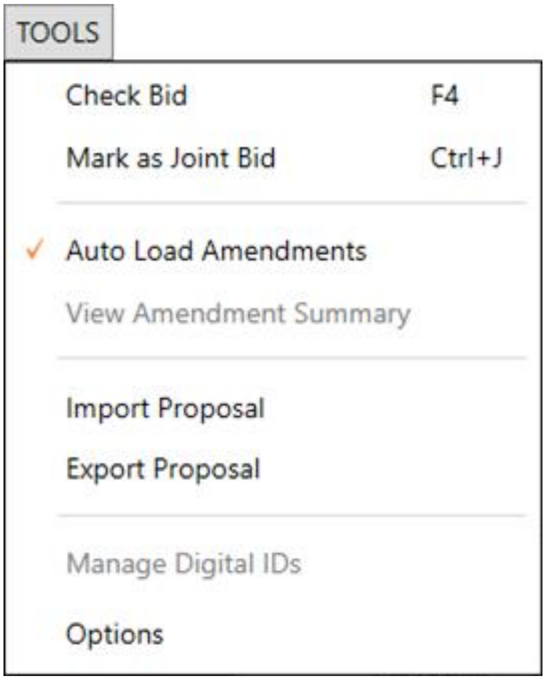
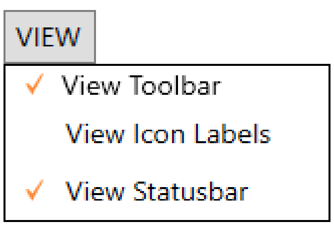
AASHTOWare Project Bids Entry

(continued)

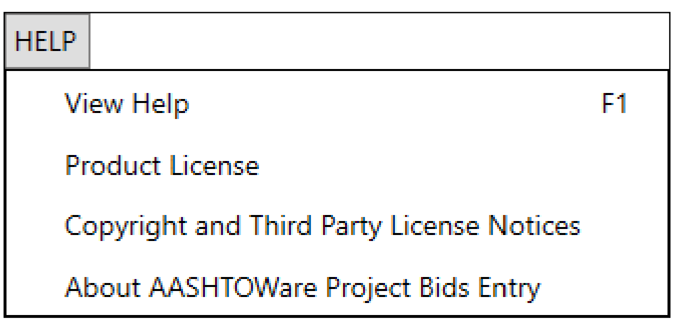


The **Tools Drop-Down Menu** contains options for bid functions such as ***Check Bid, Mark as Joint Bid, Auto Load Amendments,*** and ***View Amendment Summary.***

It also allows users to ***Import*** and ***Export Proposal*** files and contains ***Options*** for customization.



The **View Drop-Down Menu** allows you to choose if you would like to view the ***Toolbar***, ***Icon Labels***, or the ***Status Bar.***



The **Help Drop-Down Menu** allows you to access an ***Online Help*** file. You will also be able to view a popup with general information about the application such as the current version number.

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AASHTOWare Project Bids Entry

(continued)

Toolbar Buttons

NOTE: The buttons shown on the toolbar will change according to the function you are performing at the time.

Open Button: This button opens a proposal file.

Load Amendment Button: This button opens a proposal amendment file.

Save: This button saves the proposal/bid.

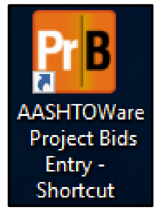
Print: This button prints the active document.

Check Bid: This button checks the current bid.

Clear Bid: This button clears the current bid.

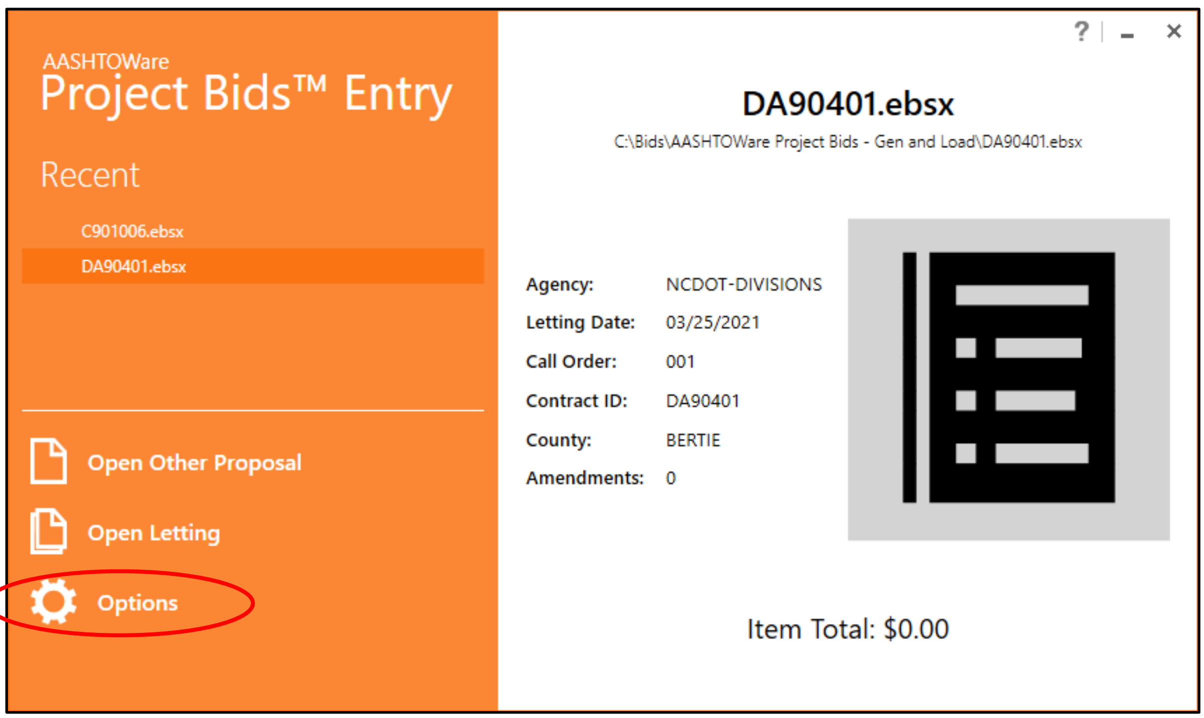
Setting Up AASHTOWare Project Bids Entry

The first time you open AASHTOWare Project Bids Entry on your machine, you will need to specify the Output Path.



From ***your Desktop***:

Step	Action	Result
1	Double-click the **AASHTOWare Project Bids Entry** icon.	The **Project Bids Entry** application will appear.



(*Project Bids Entry Main Window*)

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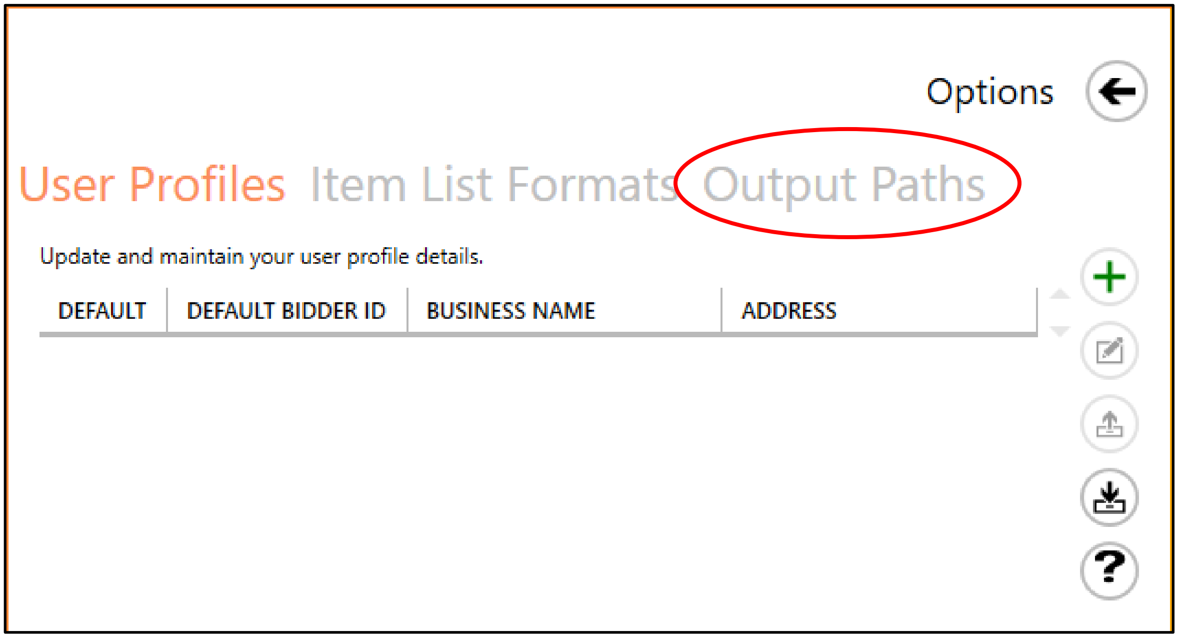
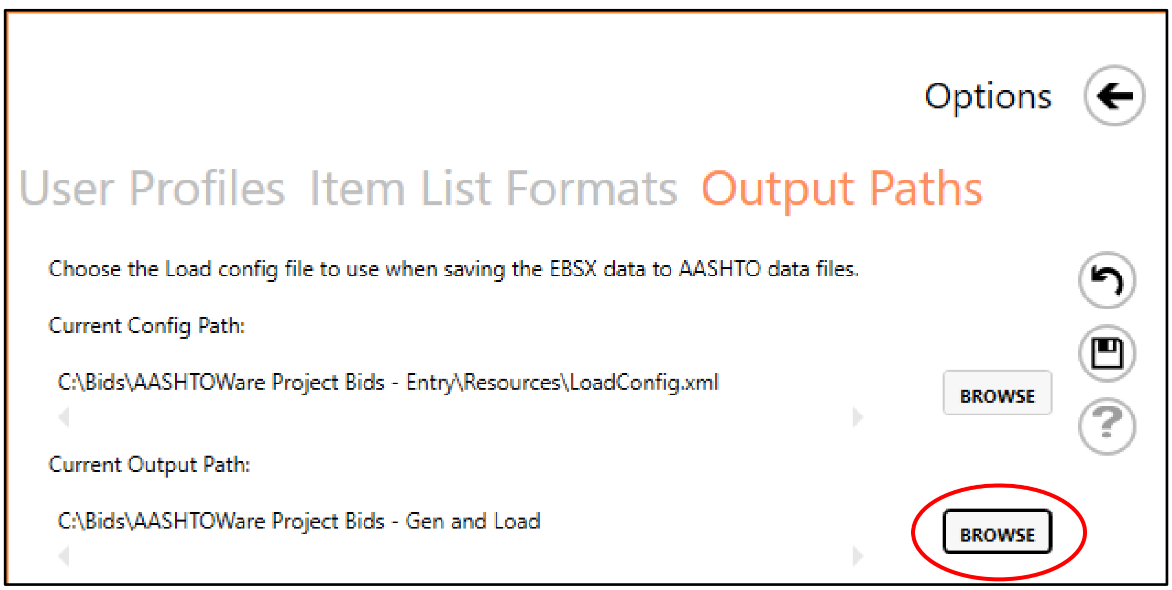
Setting Up AASHTOWare Project Bids Entry

(continued)

2	Click **OPTIONS**.	The **Options** panel will appear.



3	Click **OUTPUT PATHS**.	The **Output Paths** panel will appear.



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Setting Up AASHTOWare Project Bids Entry

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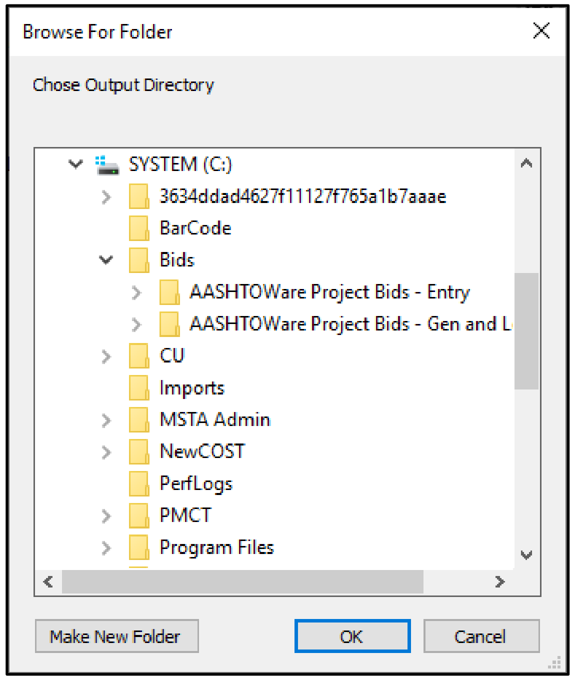
4	Click the **BROWSE** button.	The following dialog will appear.



5	Navigate to **C:\Bids\AASHTOWare Project Bids – Gen and Load)**. 🗁**NOTE:** A shared network drive and directory may also be selected based on division preference.	N/A
6	Click the **OK** button.	The specified path will appear in the **CURRENT OUTPUT PATH** field.
7	Click the **SAVE EXPORT SETTINGS** button.	The export directory has been saved successfully.

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Setting Up AASHTOWare Project Bids Entry

(continued)

8	Click **OPTIONS** arrow to hide the panel.	An empty **AASHTOWare Project Bids Entry** window will remain.

At this point you will be able to:

- Close the window.
- Open a Proposal.
- Open a Letting.

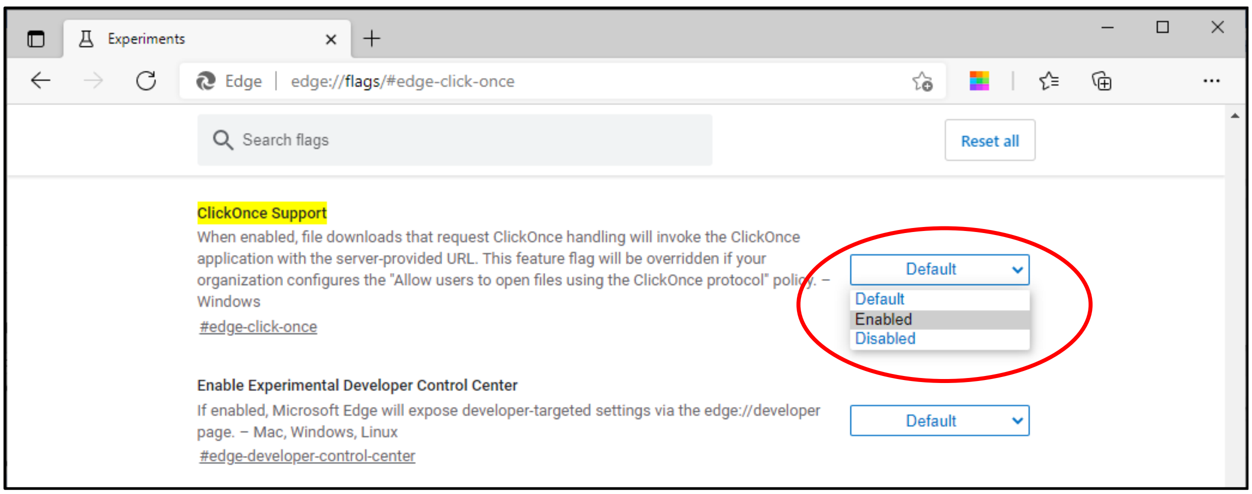
Bid Express

Setting Up Bid Express

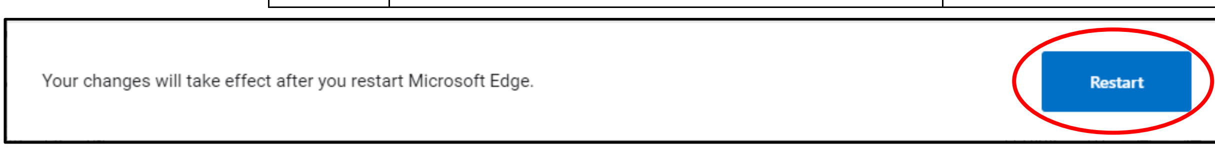
Please ensure you have installed the latest **Microsoft Edge** browser before you enable click-once settings within the web browser.

From ***your Desktop***:

Step	Action	Result
1	In the address bar of your web browser, type **EDGE://FLAGS/#EDGE-CLICK-ONCE** and press Enter.	The following page will appear.



2	Select ***Enabled*** from the drop-down list to the right of **CLICKONCE SUPPORT**.	This message will appear at the bottom of the page.



3	Click the **RESTART** button at the bottom of the page.	The **Edge** browser should close and reopen.

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Setting Up Bid Express

(continued)

You will return to the same page. Your settings have been saved.

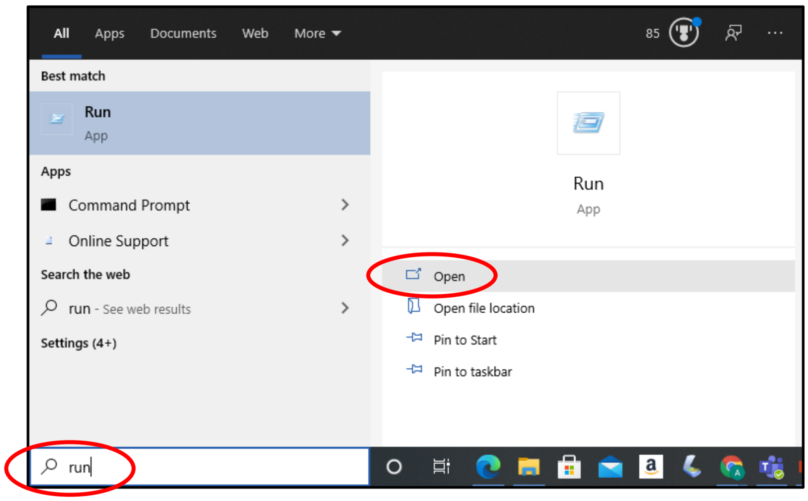
You have enabled **ClickOnce Support**.

To test: try downloading bids on **WWW.BIDX.COM** for a letting within the last 90 days.

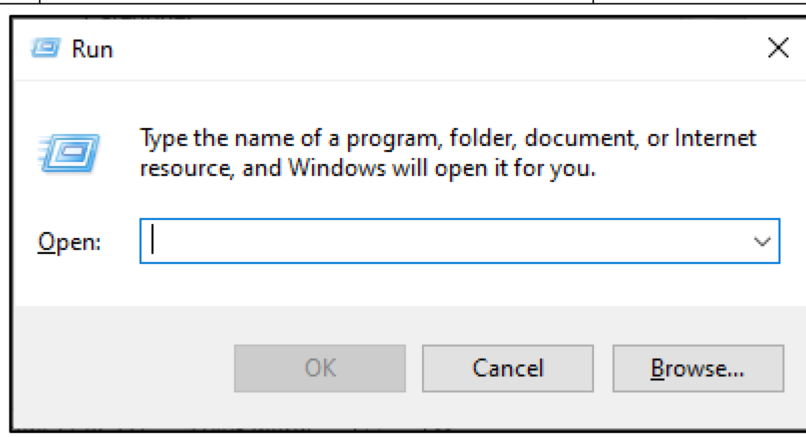
If you experience a Contact Application Vendor Error (BIDX)

From ***your Desktop***:

Step	Action	Result
1	Type ***Run*** in the search bar and press Enter.	The **Run** application will appear.



2	Click ***Open***.	The **Run** dialog will open.



3	Type ***%appdata%*** in the **OPEN** field.	N/A
4	Click the **OK** button.	The following window will appear.

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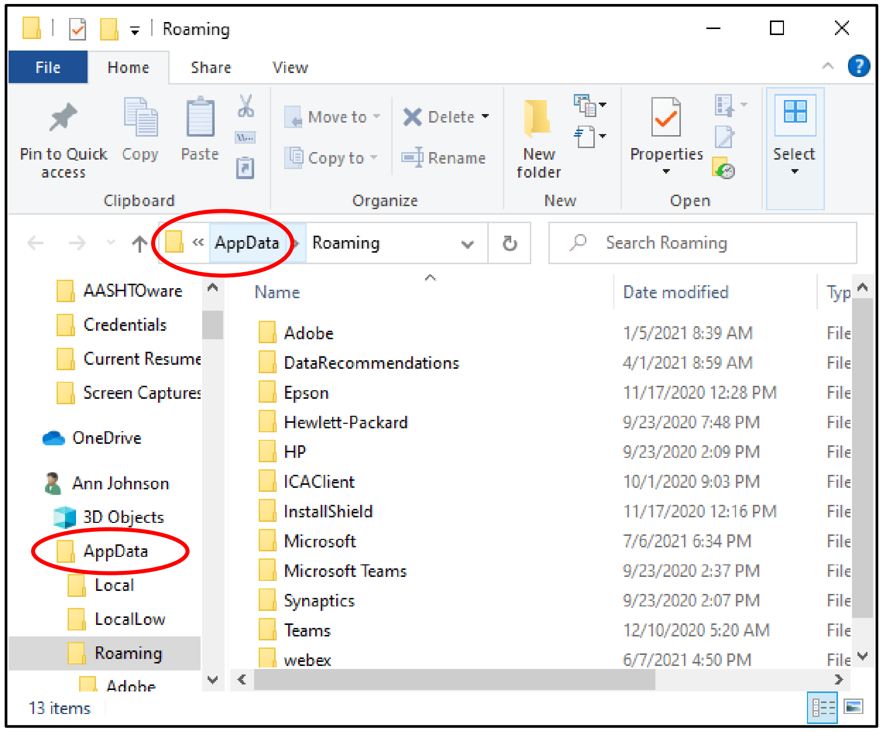
If you experience a Contact Application Vendor Error (BIDX)

(continued)



5	Click on the ***AppData*** folder.	N/A
6	Double-click on the ***Local*** or ***Local Settings*** folder. 🗁**NOTE:** This is a hidden folder.	N/A
7	Double-click on the ***Apps*** folder.	N/A
8	Delete the ***2.0*** folder.	The 2.0 folder will be deleted.

Once you have completed these steps, re-open Bids and retry.

Things to Know Before You Begin

Although the letting process with be relatively the same, the software that you are using has changed.

If you need assistance in AWP, please contact awphelp@ncdot.gov. This email has been set up specifically for your use.

While performing any procedure in this user guide, it is important to always leave your CapsLock key on. This way all information you type into the applications will have the same format and will be easier to search for.

NOTE: All applications are case-sensitive.

Access to the different options available in an application will be based on **User ID**.
Based on your specific job function, you may see some windows and not others that are shown in this User Guide.

Chapter 2 Project Setup

Assigning a Contract Number

Here you will generate (or provide) a contract number for a contract you plan to let.

Contract Number Format

Contract numbering reflects the organization who will let the contract plus a sequential number.

Division Contract Number

Always begins with D

DA#####

Alpha Character indicating Division (A=1, B=2 ,… N=14)

5 Digits

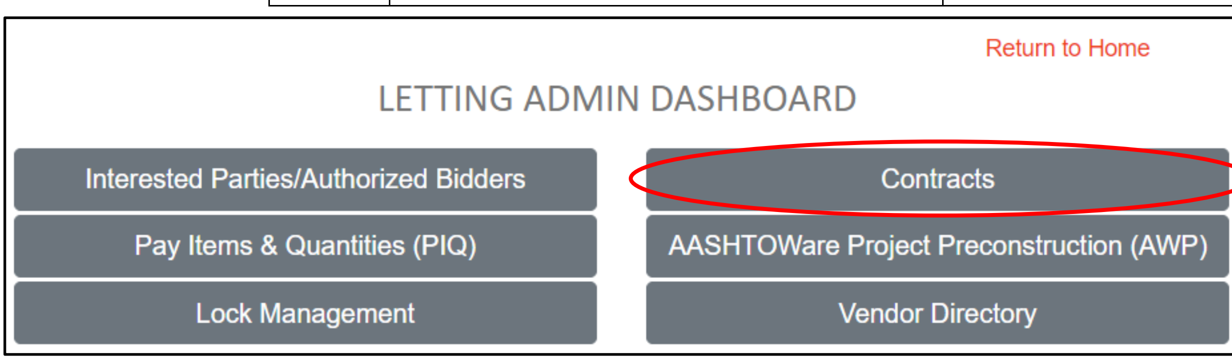
Central Contract Number

Always begins with C

C######

6 Digits

Step	Action	Result
1	In the address bar of your web browser, type [HTTPS://CONNECT.NCDOT.GOV/SITE/PRECONSTRUCTION/PAGES/LADM.ASPX#](https://connect.ncdot.gov/site/Preconstruction/Pages/LADM.aspx#) and press Enter.	The **Letting Admin Dashboard** page will appear.



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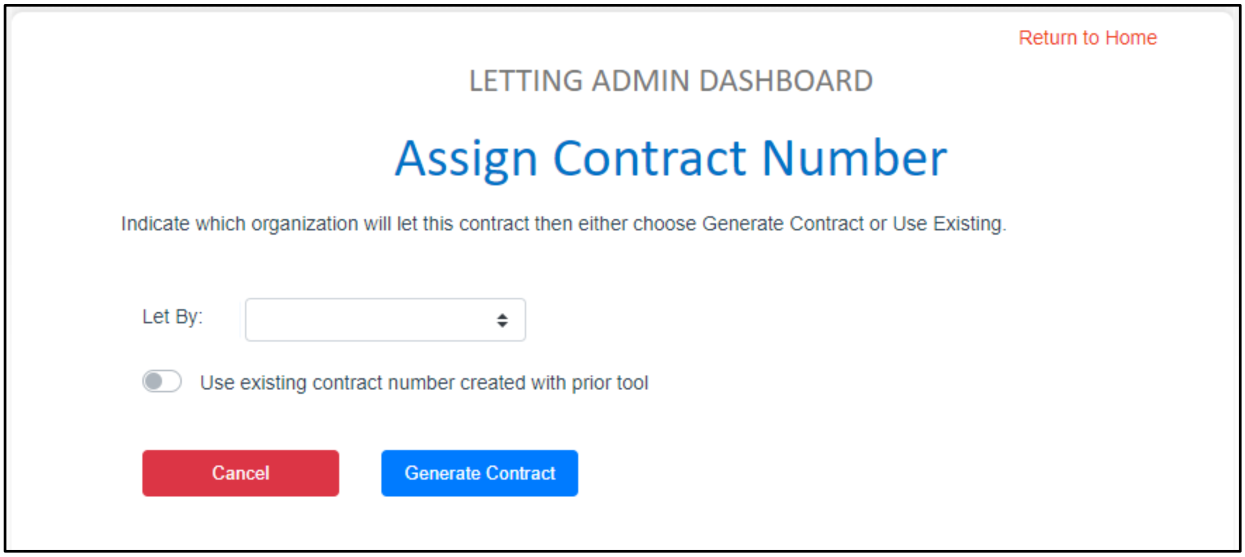
Assigning a Contract Number

(continued)

2	Click the **Contracts** button.	The list of options will appear.
3	Click the ***Assign Contract Number*** link.	The **Assign Contract Number** page will appear.



4	Select ***the organization*** from the drop-down list in the **Let By** field.	N/A

🗁**NOTE:** If a contract number has been created previously with another application, click the **Use existing contract number created with prior tool** toggle.
A Contract # **field will appear. Type** *the contract number* **in this field.**

5	Click the **Generate Contract** button. 🗁**NOTE:** If you used a previously generated contract number, click the **Use Existing** button.	A pop-up message will display indicating the new (or existing) number has been added.

Please make a note of this number. You will need it.

The number has now been saved in the master list, but it is not yet associated with any projects.

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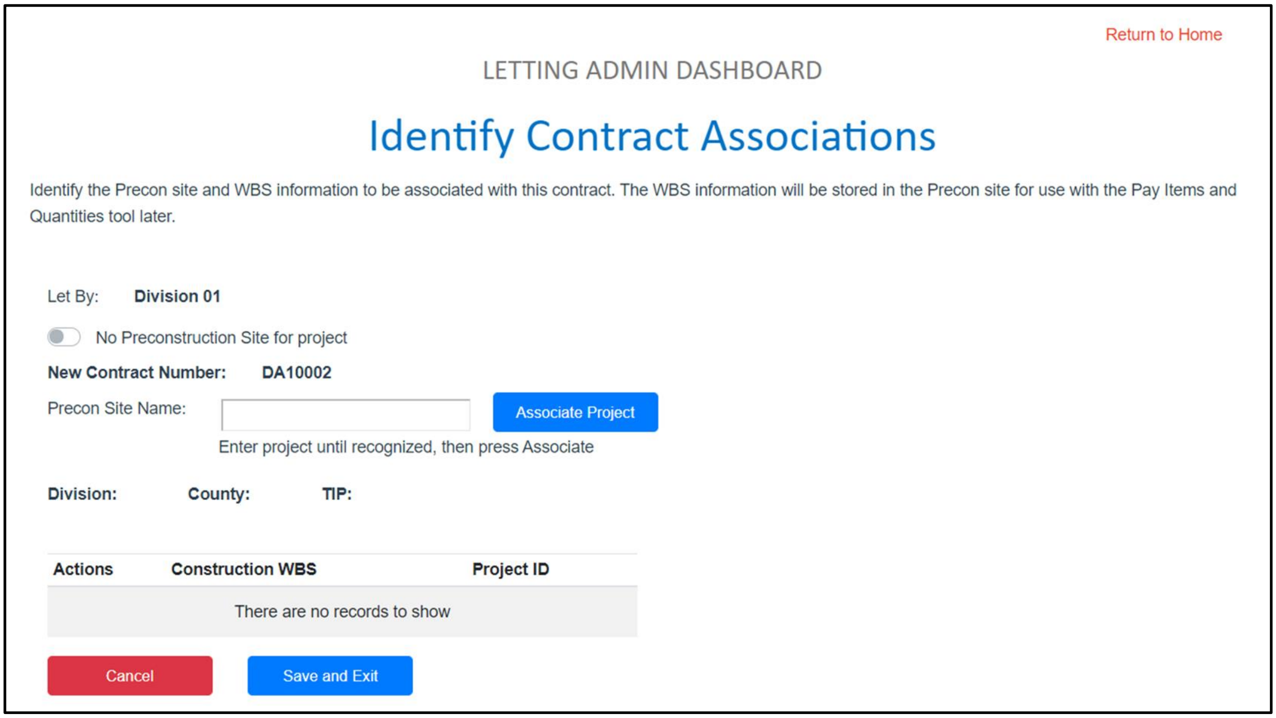
Assigning a Contract Number

(continued)

6	Click the **OK** button.	The **Identify Contract Associations** page will appear.

After you have assigned a Contract Number, you need to identify one or more projects that will be let using this contract number.



7	Type ***the preconstruction project number you wish to associate with the new contract*** in the **PRECON SITE NAME** field.	N/A
8	Click the **ASSOCIATE PROJECT** button.	The associated preconstruction project will appear at the bottom of the page.

Repeat **steps 7 & 8** for any additional preconstruction projects you wish to associate with the contract.

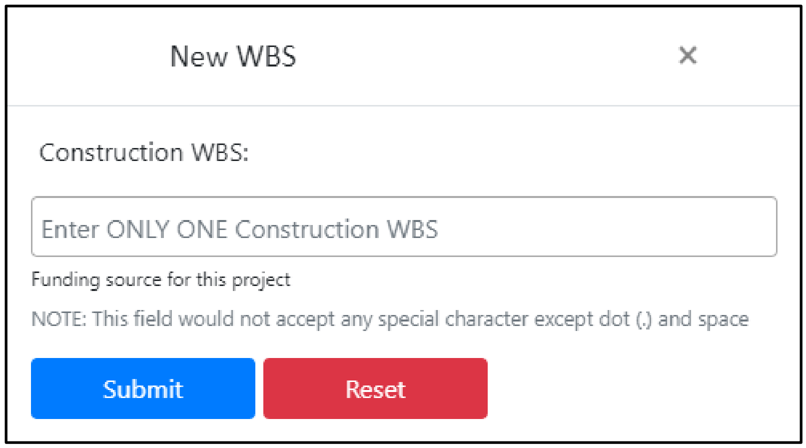
Continued on Following Page

Assigning a Contract Number

(continued)

If you wish to remove a preconstruction project from the contract, click the **DELETE** icon under the preconstruction project record.

9	To add ***a WBS number*** to a preconstruction project, click the **+ADD WBS** button.	The **New WBS** dialog will appear.



10	Type ***the WBS number*** in the **CONSTRUCTION WBS** field.	N/A
11	Select ***the preconstruction project you wish to associate this WBS with*** from the drop-down list in the **PROJECT** field.	N/A
12	Click the **SUBMIT** button.	The **WBS** and associated **preconstruction project ID** will appear in ascending alphanumeric order.

Repeat **steps 9-12** to add additional WBS numbers.

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Assigning a Contract Number

(continued)

The WBS numbers you provide here will be stored in the Preconstruction project sites on SharePoint and made available for the **Pay Items and Quantities (PIQ)** tool so that they can be selected when pay items are added.

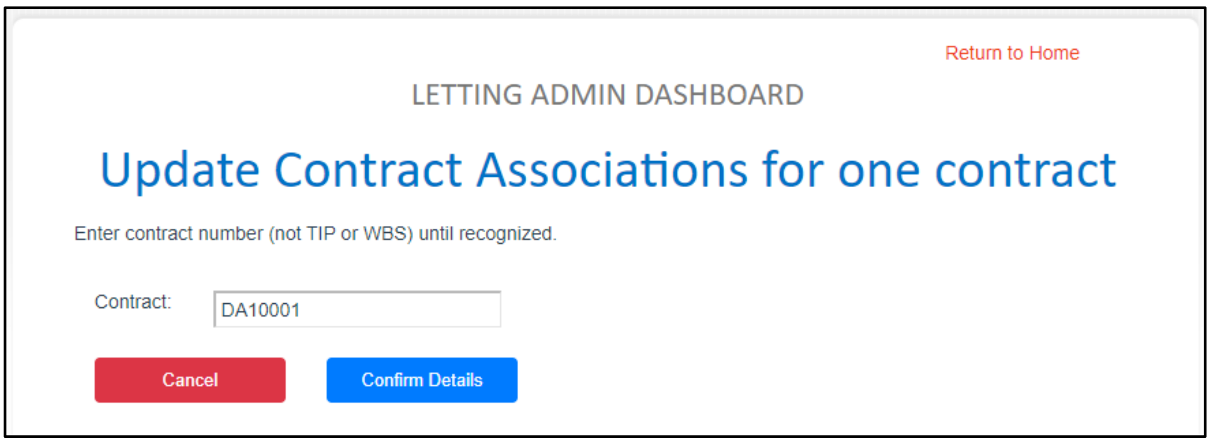
13	When you are finished, click the **SAVE AND EXIT** button.	The ***Contract Associations saved*** message will appear.
14	Click the **OK** button.	You will return to the **Letting Admin Dashboard**.

Updating Contract Associations for One Contract

If you want to update information for <u>one</u> contract, use this option. It will allow you to add or update the projects or WBS values that are associated with this contract.

From the **Letting Admin Dashboard**:

Step	Action	Result
1	Click the **CONTRACTS** button.	The list of options will appear.
2	Click the ***Update Contract Associations for one contract*** link.	The **Update Contract Associations for one contract** page will appear.

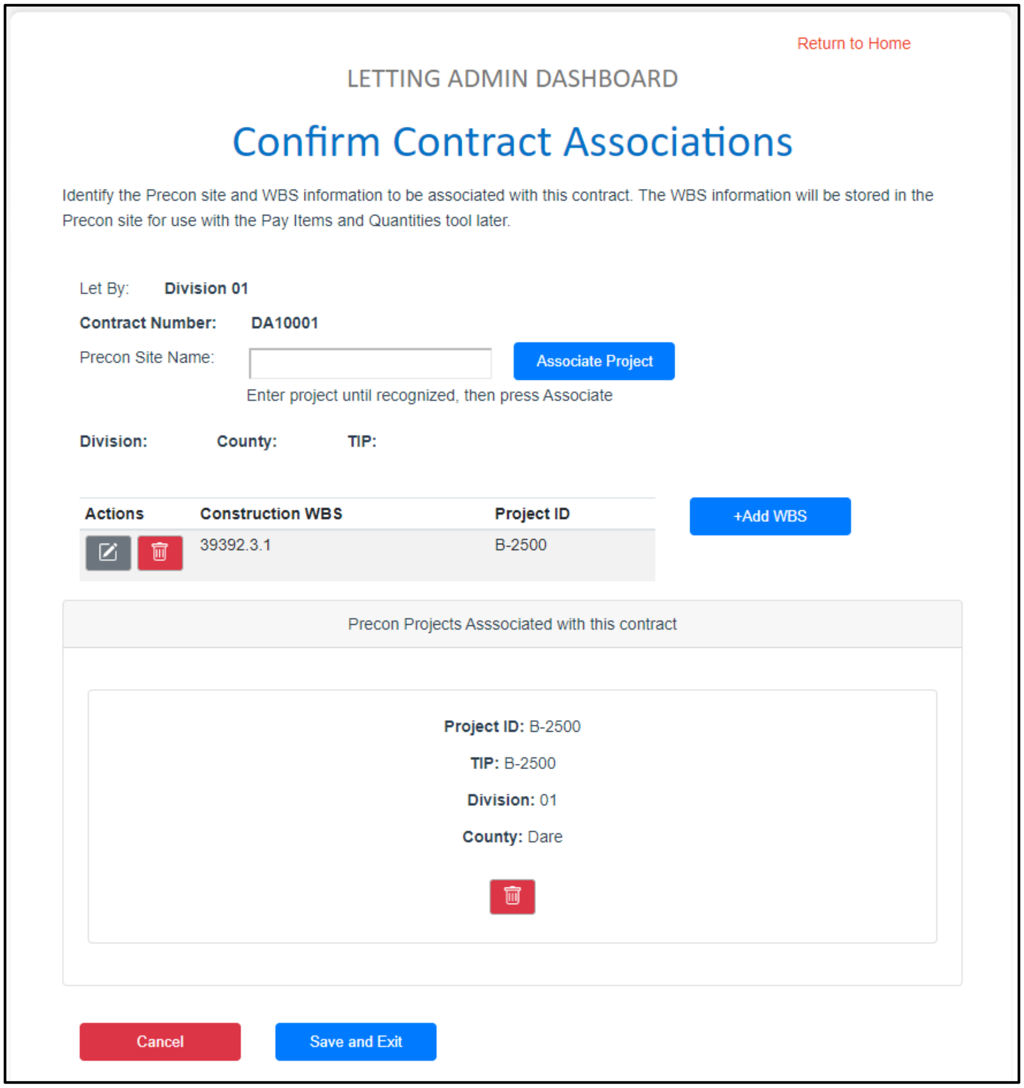


3	Type ***the Contract Number*** in the **CONTRACT** field.	N/A
4	Click the **CONFIRM DETAILS** button.	The **Confirm Contract Associations** page will appear.

Continued on Following Page

Updating Contract Associations for One Contract

(continued)



To add additional projects to the contract:

5	Type ***the Preconstruction site name (usually the TIP)*** in the **PRECON SITE NAME** field.	N/A
6	Click the **ASSOCIATE PROJECT** button.	The associated project will appear at the bottom of the page.

Continued on Following Page

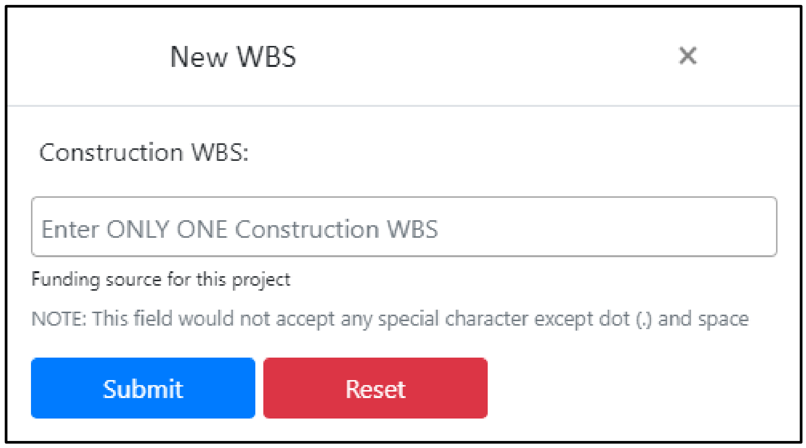
Updating Contract Associations for One Contract

(continued)

Repeat **steps 5 & 6** for each additional project.

To add additional WBS numbers to this project:

7	Click the +**ADD WBS** button.	The **New WBS** dialog will appear.



8	Type ***the WBS number*** in the **CONSTRUCTION WBS** field.	N/A
9	Click the **SUBMIT** button.	The WBS numbers will appear in ascending alphanumeric order.

Repeat **steps 7-9** for each additional WBS.

10	When you are finished adding projects and WBS numbers, click the **SAVE AND EXIT** button.	Your information has been saved.

If **Pay Items and Quantities** have already been stored in a project and a change is made to the WBS values, an error message will appear.

For assistance in correcting the existing items to point to the corrected WBS values, contact Preconstructionhelp@ncdot.gov.

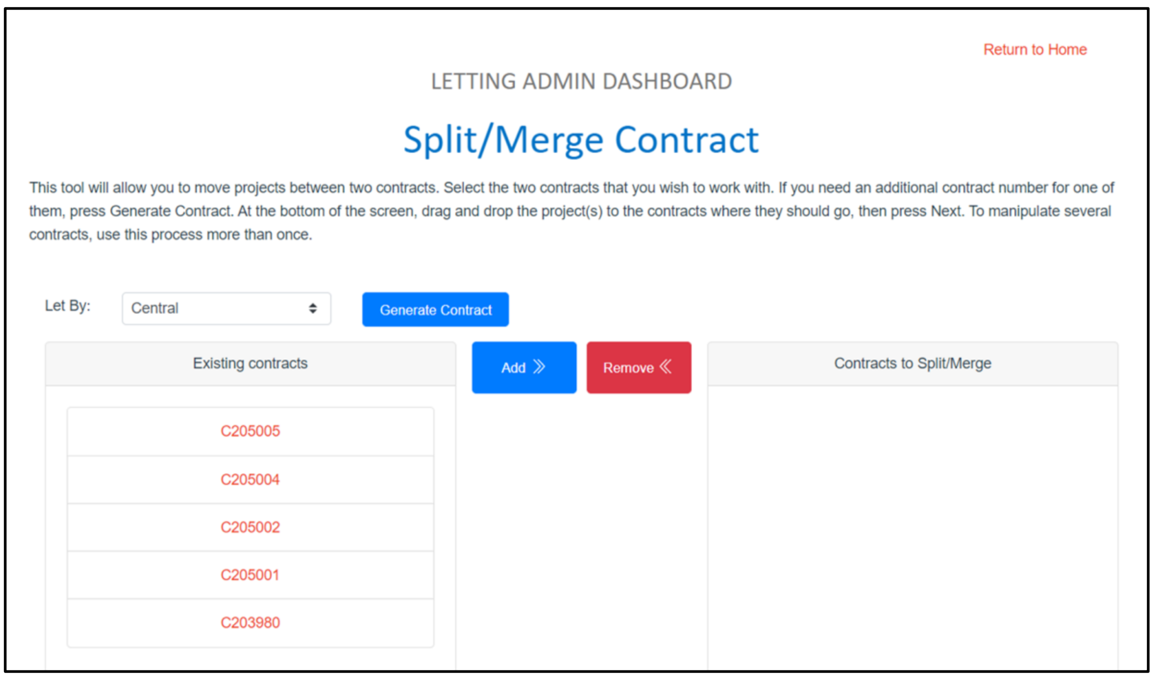
Spitting or Merging a Contract

This option allows you to move projects between two contracts. If you had previously defined a contract as containing multiple projects and now you need to split one or more of those off into another contract, or if you wish to combine projects in multiple contracts into one contract, this is the tool to use.

Existing Contracts

From the **Letting Admin Dashboard**:

Step	Action	Result
1	Click the **CONTRACTS** button.	The list of options will appear.
2	Click the ***Split or Merge Contract*** link.	The **Split/Merge Contract** page will appear.



3	Select ***the organization*** from the drop-down list in the **LET BY** field.	The list of existing contracts will appear in the left column.
4	You will be selecting 2 contracts. Click on ***the first contract number*** to select it.	N/A

Continued on Following Page

Spitting or Merging a Contract

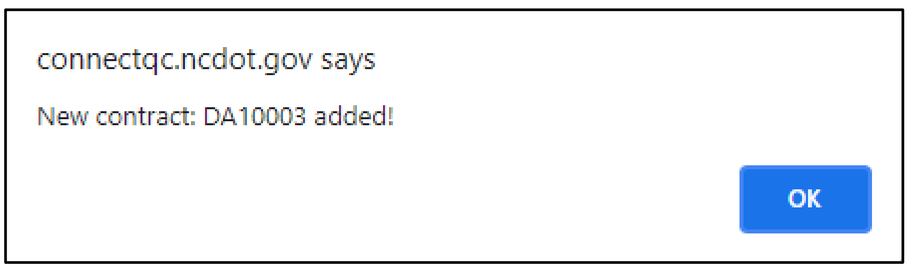
(continued)

5	Click the **Add** button.	The selected contract will be moved to the right column.
6	Click on ***the second contract number*** to select it.	N/A
7	Click the **Add** button.	The selected contract will be moved to the right column.

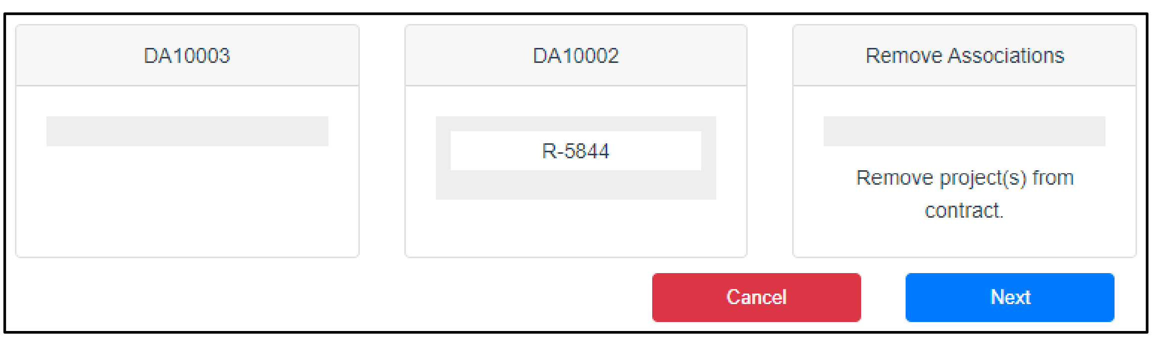
New Contract

If you are adding a **new** contract as the second contract:

6	Click the **Generate Contract** button. 🗁**NOTE:** This is the new number that you intend to move the existing projects into.	The following message will appear, and the new contract will appear in the right column.



Both contracts and the associated projects will appear at the bottom of the page.



Continued on Following Page

Spitting or Merging a Contract

(continued)

8	Drag and drop the projects to move them from one contract to another.	N/A

🗁**NOTE:** If you wish to remove the project associations completely, drag the projects under **REMOVE ASSOCIATIONS**.

9	When you are satisfied with your changes, click the **NEXT** button.	The **Handle Contract Split/Merge** page will appear.

Each Contract will appear with the Projects listed beneath it. Underneath these, the associated WBS values will be listed, including their current alphabet letter assigned to correspond to the letters assigned in AASHTOWare Project Preconstruction (AWP).

Two toggles will appear beneath and slightly to the right.

1. Reorder/Relabel the WBS values.

   🗁**NOTE:** If you already had the previous letter order set up in AWP, you may not want these WBS values reordered and relabeled. If you **DO** want the WBS values to be reordered & renamed, beginning from A, use this toggle.
   The letters will be left as they are unless this toggle is selected.

2. Use the previous contract number for export.

   🗁**NOTE:** If you already have Projects set up in AWP using the previous contract number in the name, you may want to ensure that the Pay Items and Quantities tool continues to export the pay items using the old name, so they will import into AWP correctly. If you use this toggle, it will continue to use the other contract number for export, even though for reference purposes, the new contract number will be used.
   If you have multiple projects involved and there are multiple answers for a given contract, contact **PreconstructionHelp@ncdot.gov** *to specify exactly which contract # you would like used for the export for each of the projects.*

Continued on Following Page

Spitting or Merging a Contract

(continued)

10	After validating the results & making your selections, click the **SAVE AND EXIT** button.	The following message will appear.

🗁**NOTE:** The Contract and WBS information used by the PIQ tool in each of the listed projects will also be updated.

11	Click the **OK** button.	You will return to the **Letting Admin Dashboard** page.

Setting Up a Contract Cluster

A contract cluster is a way of offering different options to the bidders. For example, we could offer them project A and project B to bid on as separate projects, or they could choose to bid on them both combined into a new project (Project C). Project C would be what is referred to as a project cluster.

After the letting, you will know which contract numbers are needed.

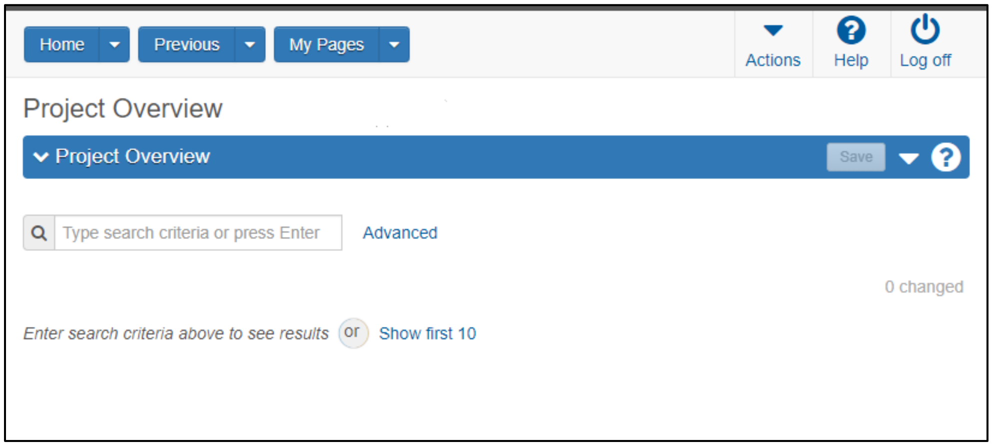
1. To create a new contract, see **Assigning a Contract Number** on **Page 2-1**.
2. To combine contracts (2 contracts at a time), see **Spitting or Merging a Contract** on **Page 2-9**.

   🗁**NOTE:** At this time, the original numbering of the WBS values in each project should stay the same, so that they don't get numbered as if they are all in one project.

Finding a Project

From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	In the **Preconstruction** section, click **PROJECTS**.	The **Project Overview** page will appear.



Step	Action
2	The search filter requires 3 characters and will continue auto filtering the list as you type.

Criteria	Result
Project Number	The project
Partial Project Number	A list of projects that contain the criteria
WBS Number	The project(s) associated with the WBS Number
Partial WBS Number	List of projects that associated with a WBS that contains the criteria
TIP Number	The project(s) associated with the TIP Number
Partial TIP Number	List of projects that are associated with a TIP that contains the criteria
“State”	List of all state-funded projects
County / Partial County	List of projects associated with the county

Step	Action	Result
3	Click on the **PROJECT NUMBER** you wish to open.	The project will open.

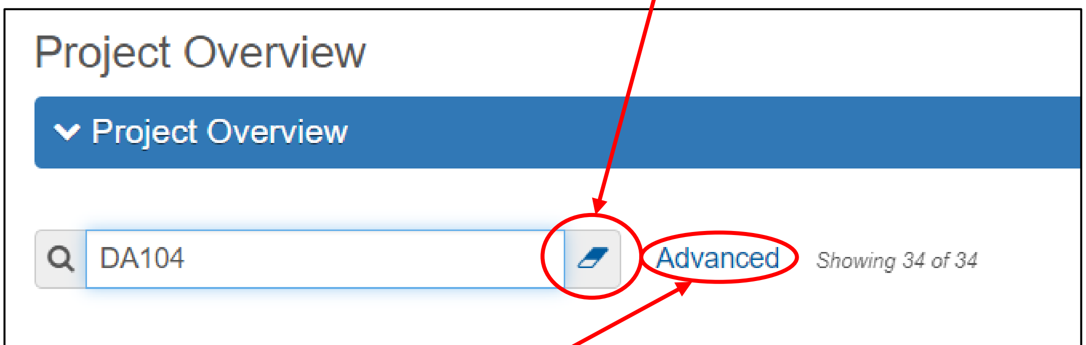
Continued on Following Page

Finding a Project

(continued)

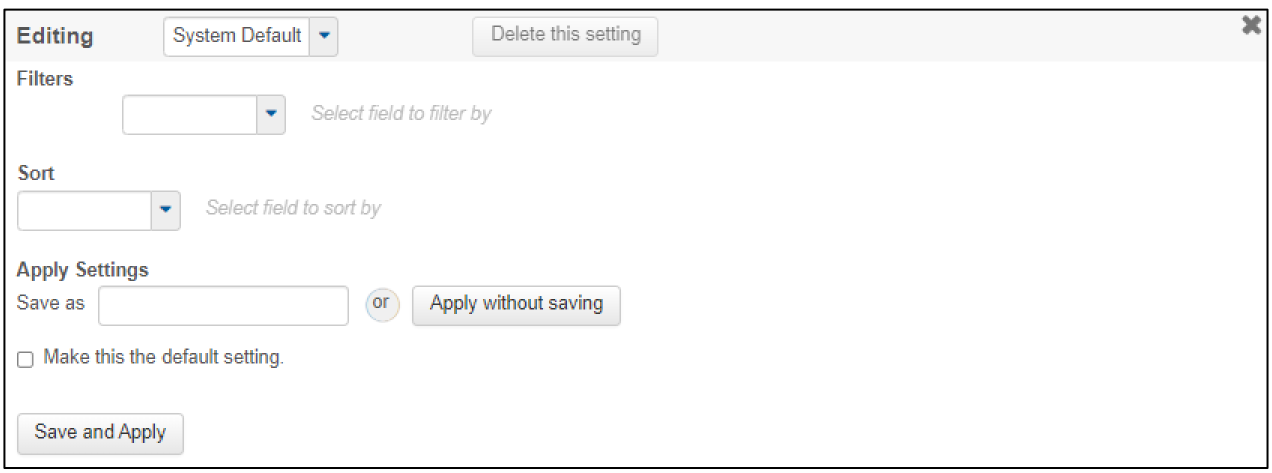
Clearing the Search & Filter Criteria

To clear the contents of the **SEARCH** box (and any other filter selections you have chosen), click the **CLEAR** button to the right of the **SEARCH** box.



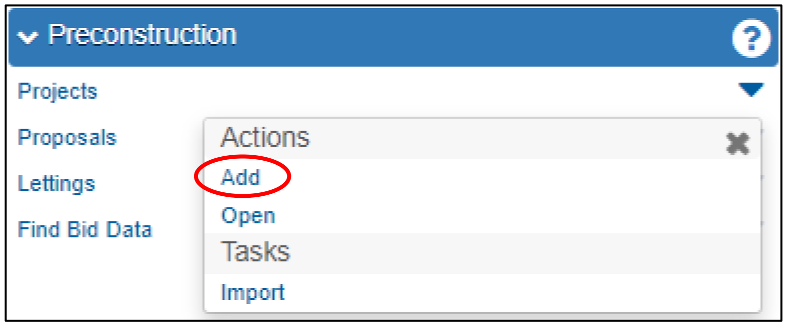
Advanced Search Options

Clicking the **ADVANCED** link provides more advanced search options.



Adding a Project

From the ***AASHTOWare Project Dashboard:***



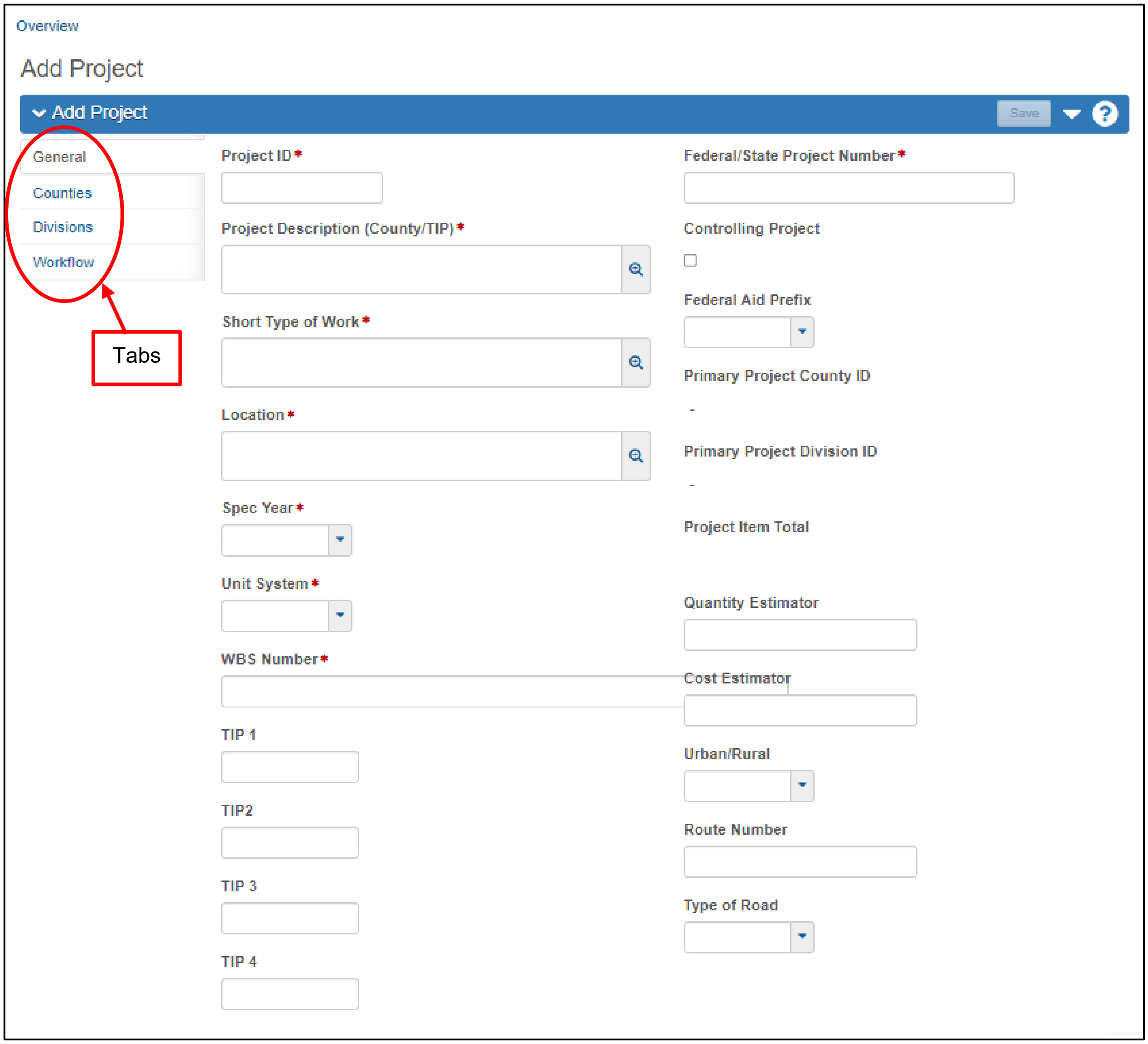
(*Preconstruction Menu*)

Step	Action	Result
1	In the **Preconstruction** section, click the drop-down arrow to the right of **PROJECTS**. 🗁**NOTE:** You can also perform this step from the **Project Overview Page** shown on **Page 2-15**.	A menu will appear.
2	Click **ADD**.	The **Add Project** page will appear.

Continued on Following Page

Adding a Project

(continued)



(*Add Project Page – General Tab*)

General Tab

🗁**NOTE:** Fields marked with a red asterisk (*) are required to save the project.

Continued on Following Page

Adding a Project

(continued)

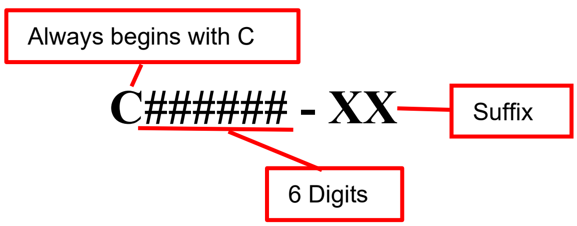
Project Number Format

The estimator is responsible for setting up projects for each section of the proposal. The projects will have the following naming convention:

🗁**NOTE:** The contract number assigned in the **Letting Admin Dashboard** is used as the project number. This procedure is on **Page 2-1**.

Division Contract Number

Central Contract Number



The **Suffix** identifies the section of the project:

ST	Structure projects
RW	Roadway projects

3	Turn on CAPS LOCK by pressing the CapsLock key. All information entered into the system must be in **ALL CAPS**.	N/A
4	Type ***the project number*** in the **PROJECT ID** field. 🗁**NOTE:** Attach the following suffix if applicable: **-ST** (for Structure projects) **-RW** (for Roadway projects) **This field will not be able to be changed after you save the project.**	N/A

Continued on Following Page

Adding a Project

(continued)

5	Type ***the county name and TIP number*** in the **PROJECT DESCRIPTION (COUNTY/TIP)** field.	N/A

📖 **Helpful Hint**

🗁**NOTE:** No punctuation is needed in this field.
Example: JOHNSTON WAYNE B-4321

6	Type ***a brief description*** in the **SHORT TYPE OF WORK** field.	N/A

📖 **Helpful Hint**

Example: GRADING, DRAINAGE, PAVING & CULVERT

7	Type ***the project location*** in the **LOCATION** field.	N/A

📖 **Helpful Hint**

🗁**NOTE:** This is a **TO/FROM** type of description.
Example: I-40 FROM US-70 TO I-440

The **LOCATION** field can accommodate 120 characters.

8	Select the ***specification year*** from the drop-down list in the **SPEC YEAR** field.	N/A
9	Select ***English*** or ***Metric*** from the drop-down list in the **UNIT SYSTEM** field.	N/A
10	Type the ***WBS number*** in the **WBS NUMBER** field.	N/A
11	If applicable, type the ***TIP Number*** in the **TIP 1** field. If there are additional TIP Numbers, type them in the remaining 3 TIP fields (**TIP 2**, **TIP 3** and **TIP 4**)	N/A
12	Type the ***federal aid number*** in the **FEDERAL/STATE PROJECT NUMBER** field. 🗁**NOTE:** If the project is state-funded, type **STATE FUNDED** in this field.	N/A

Continued on Following Page

Adding a Project

(continued)

13	Leave the **CONTROLLING PROJECT** check box unchecked.	N/A
14	If applicable, select ***the federal aid prefix*** from the drop-down list in the **FEDERAL AID PREFIX** field.	N/A

The **PRIMARY PROJECT COUNTY** and **PRIMARY PROJECT DIVISION** information will be added on the **COUNTIES** and **DIVISIONS** tabs.

The **PROJECT ITEM TOTAL** will be updated after items are added to the project.

15	Type ***the name of the Quantity Estimator*** in the **QUANTITY ESTIMATOR** field. (Format: First Initial Last Name without spaces i.e., JSMITH)	N/A
16	Type ***the name of the Cost Estimator*** in the **COST ESTIMATOR** field. (Format: First Initial Last Name without spaces i.e., JSMITH)	N/A

🗁**NOTE:** If you don't know who the ***Quantity*** or ***Cost Estimators*** are at this time, you will be able to edit these fields later.

17	Select ***U (Urban)***, ***R (Rural)*** or ***None*** from the drop-down list in the **URBAN/RURAL** field. 🗁**NOTE:** Leaving this field blank is equal to selecting ***None***.	N/A
18	Type ***the route number*** in the **ROUTE NUMBER** field.	N/A
19	Select the ***type of road*** from the drop-down list in the **TYPE OF ROAD** field.	N/A

Continued on Following Page

Adding a Project

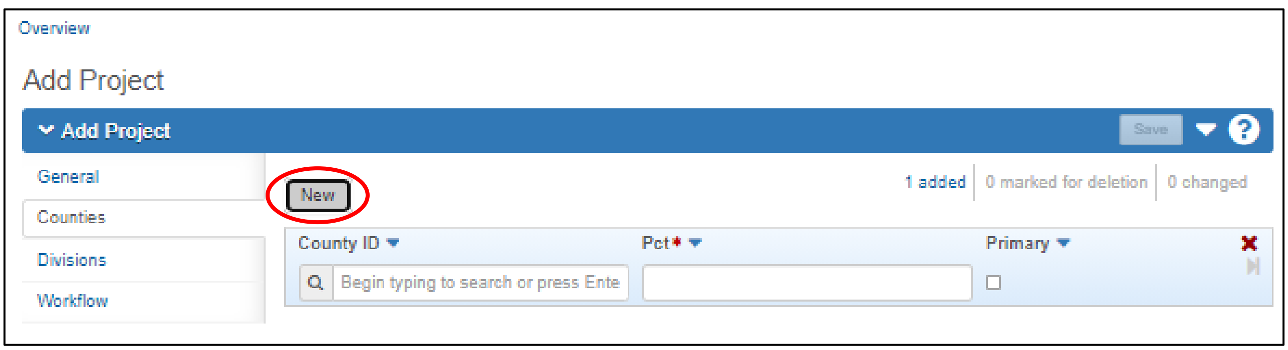
(continued)

20	Click the **SAVE** button in the **Header Bar**.	The project will be saved. The **Project Number and Description** will now appear in the **Header Bar**.

Helpful Hint

It is important that you save each time before going to another tab to prevent losing any entered data.

21	On the left side of the page, click on the ***Counties*** tab.	The **Counties** tab will appear.



(Add Project Page – Counties Tab)

Counties Tab

22	Click the **NEW** button.	A row will appear for the County.
23	Start typing ***the County*** in the **COUNTY ID** field	The county will appear in the result list.
24	Click on ***the county in the result list*** to select it.	The selected County will appear in the **COUNTY ID** field.

Continued on Following Page

Adding a Project

(continued)

25	Type ***the percentage of the project that will be executed in the selected county*** in the **PCT** field.	N/A

If you have multiple counties, the sum of the percentages in the **PCT** fields should equal 100%

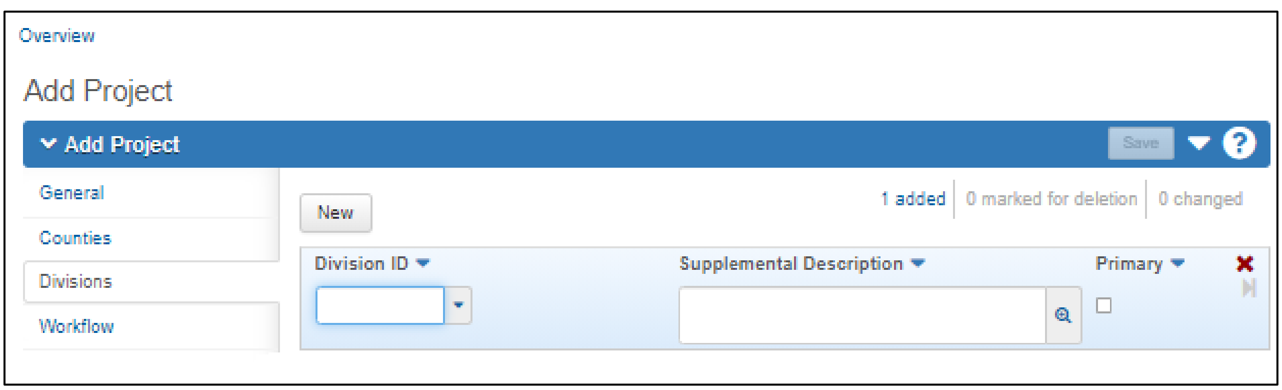
Repeat steps **22-25** for each county in which the project will be executed.

If you have more than one county, check the **PRIMARY** check box to indicate the primary county the project will be executed in.

26	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Divisions Tab

27	On the left side of the page, click on the ***Divisions*** tab.	The **Divisions** tab will appear.



(*Add Project Page – Divisions Tab*)

28	Click the **NEW** button.	A row will appear for the **Division**.

Continued on Following Page

Adding a Project

(continued)

29	Click in the **Division ID** field and press Enter. You can also start typing in this field and the results will auto filter in the drop-down.	A drop-down list of divisions will appear.
30	Select ***the division*** from the list.	The selected Division will appear in the **Division ID** field.
31	Leave the **Supplemental Description** field blank. No additional description is needed.	N/A

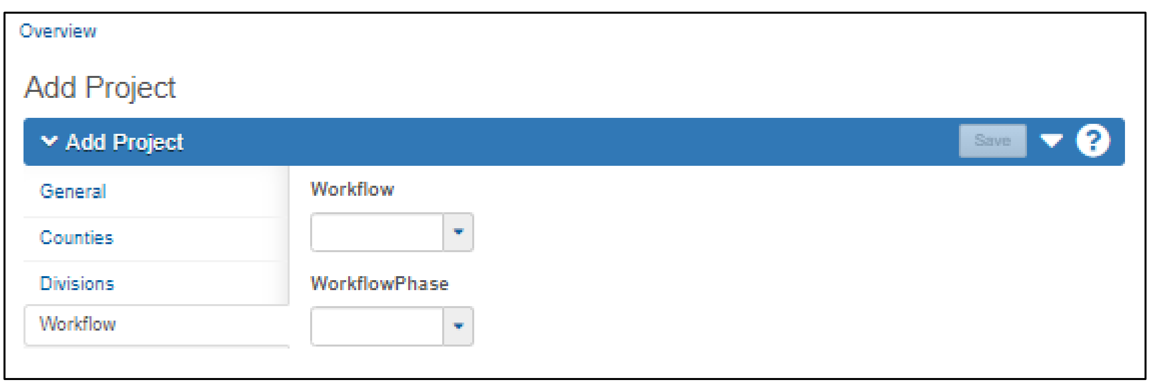
Repeat steps **28-31** for each division in which the project will be executed.

If you have more than one division, check the **Primary** check box to indicate the division that will be managing the construction of the project.

32	Click the **Save** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Workflow Tab

33	On the left side of the page, click on the ***Workflow*** tab.	The **Workflow** tab will appear.



(*Add Project Page – Workflow Tab*)

Continued on Following Page

Adding a Project

(continued)

34	Select ***NCDOT – Division Workflow*** from the drop-down list in the **WORKFLOW** field.	Your selection will appear in the **WORKFLOW** field.
35	Select ***DLADM*** from the drop-down list in the **WORKFLOW PHASE** field.	Your selection will appear in the **WORKFLOW PHASE** field.
36	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

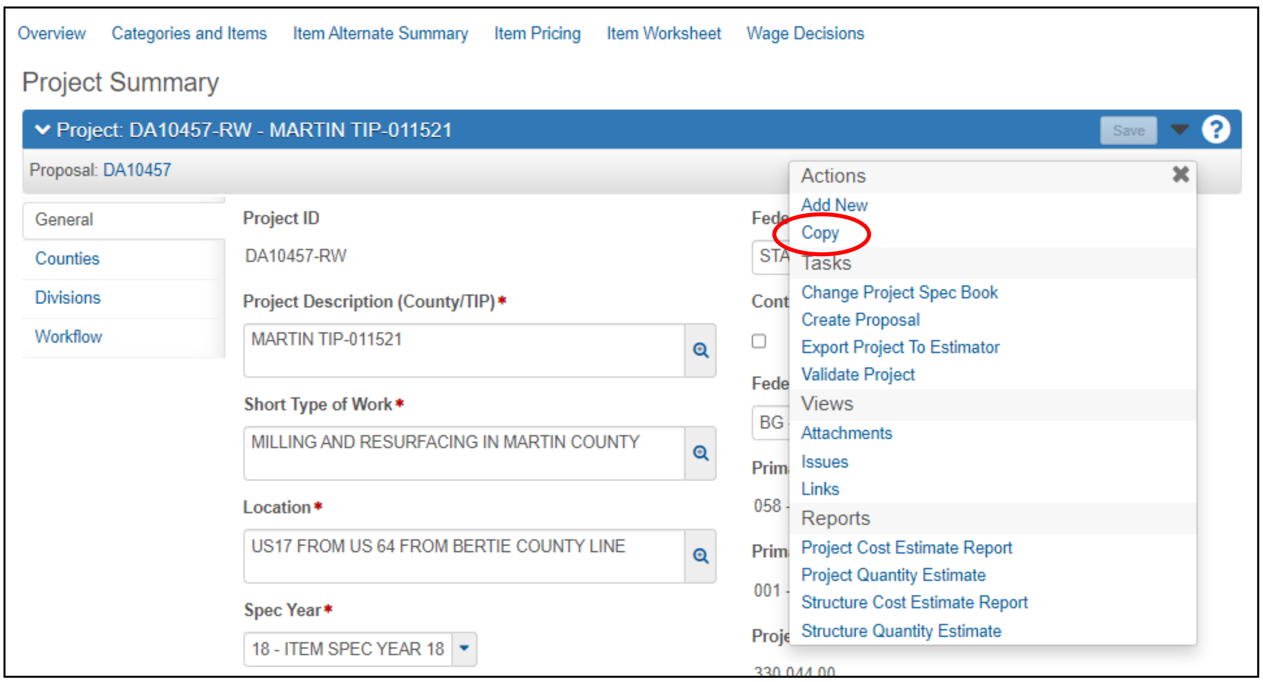
Copying a Project

When you have created one project (Roadway) for a proposal you will be able to copy the project and change the applicable information for the other sections (Structure/etc.).

You will also be able to copy any project if you are creating one that is similar in the future.

🗁**NOTE:** If you have a culvert, wall, or bridge on your project, you must create a **RW** and a **ST** project.

From within a project, on the **Project Summary** page:



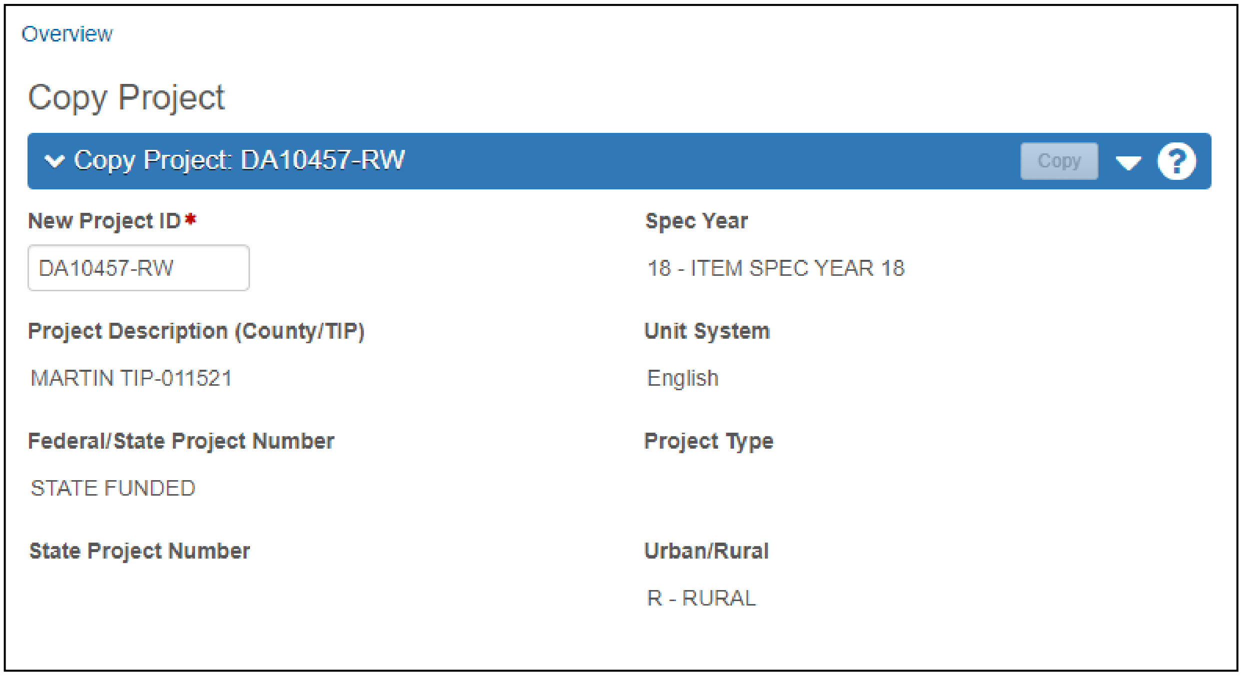
(Project Summary Page)

Step	Action	Result
1	From the drop-down arrow at the right side of the **Header Bar** select COPY.	The **Copy Project** window will appear.

Continued on Following Page

Copying a Project

(continued)



(*Copy Project Window*)

2	The number of the project you have just copied will appear in the **New Project ID** field. Overwrite this number with ***the number of the project you are creating*** from this project.	N/A
3	Click anywhere on the page to set focus outside of the **New Project ID** field.	The **Copy** button on the right side of the **Header Bar** will become enabled.
4	Click the **Copy** button on the right side of the **Header Bar**.	The new project will be saved. The new **Project Number and Description** will now appear in the **Header Bar**.

Continued on Following Page

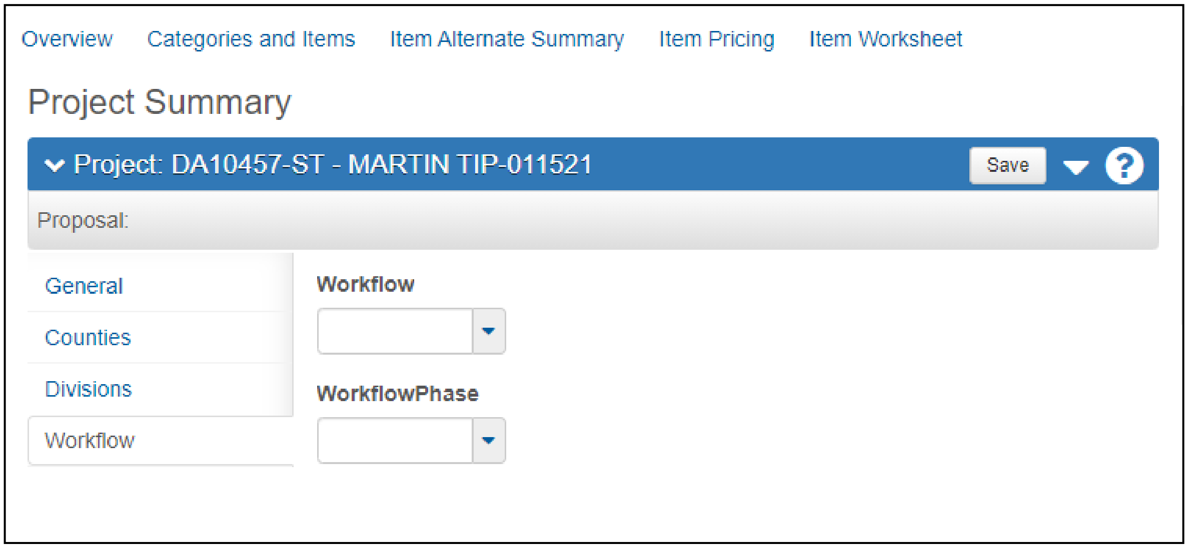
Copying a Project

(continued)

You will now be able to edit information on all tabs of the project.

The information on the **Workflow** tab will be reset.

5	Click on the **Workflow** tab.	The **Workflow** tab will appear.

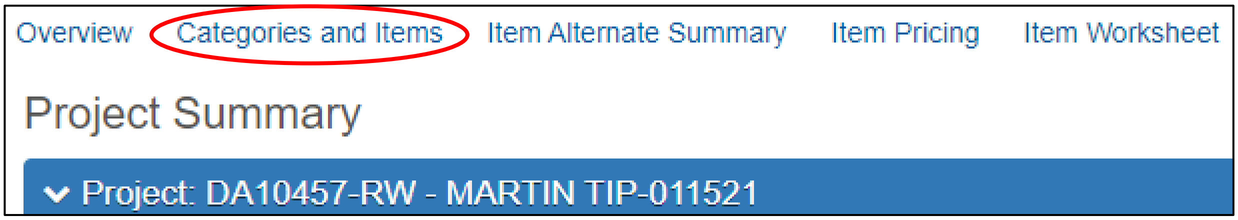


(*Copy Project Window – Workflow Tab*)

6	Select ***NCDOT – Division Workflow*** from the drop-down list in the **WORKFLOW** field.	Your selection will appear in the **WORKFLOW** field.
7	Select ***DLADM*** from the drop-down list in the **WORKFLOW PHASE** field.	Your selection will appear in the **WORKFLOW PHASE** field.
8	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

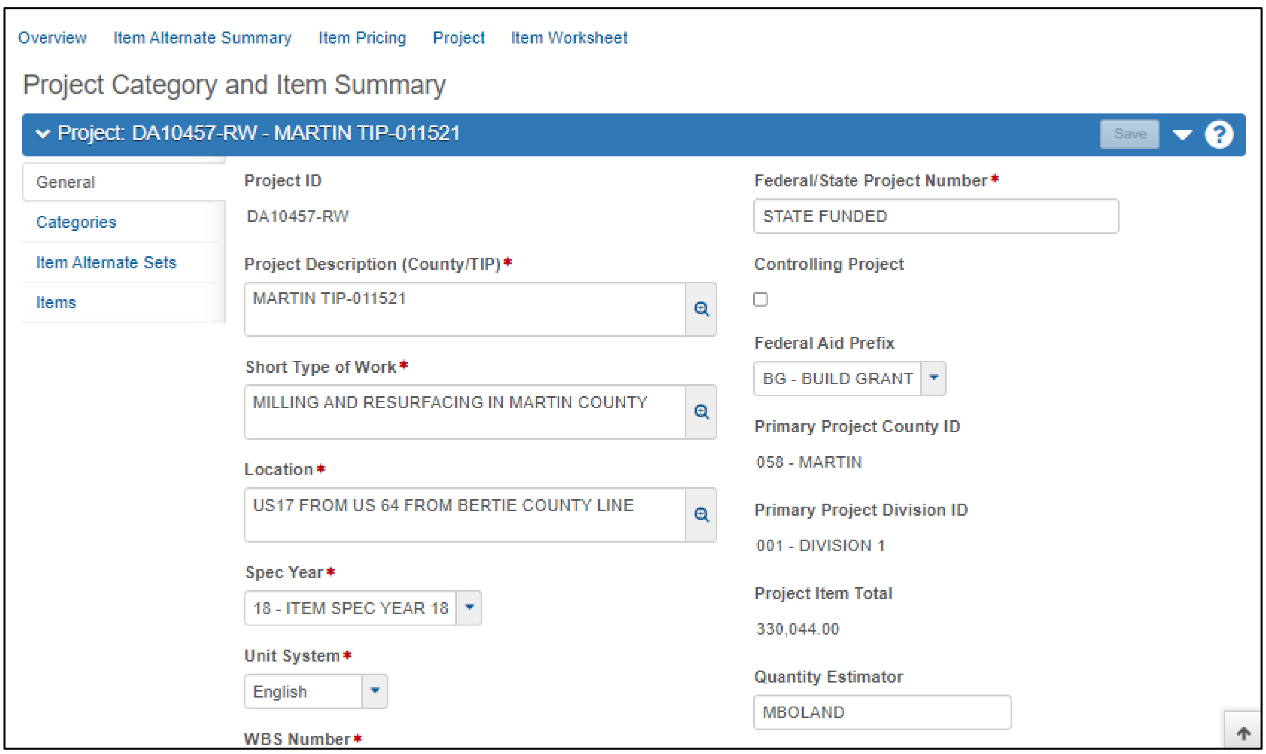
Categories

From within a project, on the **Project Summary** page:



Adding Categories

Step	Action	Result
1	Click the CATEGORIES AND ITEMS quick link.	The **Project Category and Item Summary** page will appear.



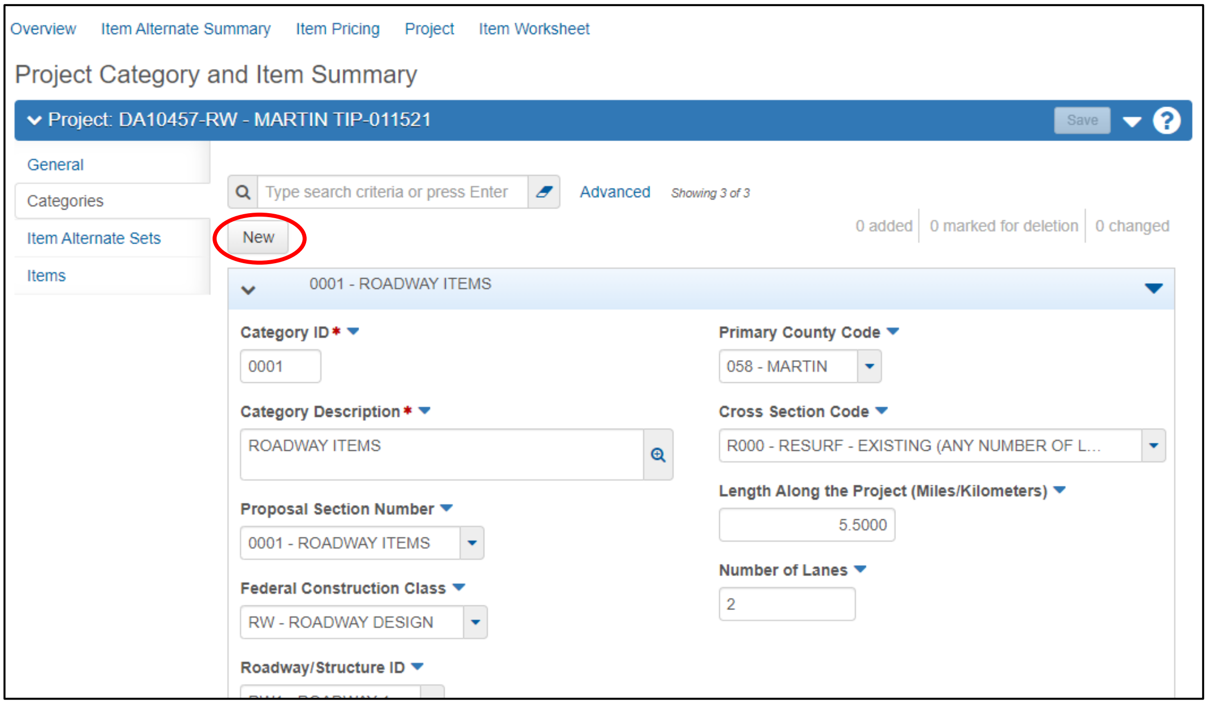
(*Project Category and Item Summary Page – General Tab*)

Step	Action	Result
2	Click the **Categories** tab.	The **Categories** tab will appear.

Continued on Following Page

Categories

(continued)



(*Project Category and Item Summary Page – Categories Tab*)

Adding a Roadway Category

3	Click the **New** button.	Category input fields will appear.
4	Type **a 4-digit number** in the **Category ID** field. Begin at 0001.	N/A
5	Type ***ROADWAY ITEMS*** in the **Category Description** field.	N/A
6	Select ***0001*** from the drop-down list in the **Proposal Section Number** field.	N/A

The value in the **Proposal Section Number** field, controls which fields will appear on the right side of the page.

7	Select ***RW*** from the drop-down list in the **Federal Construction Class** field.	N/A

Continued on Following Page

Categories

(continued)

8	Select ***RW1*** from the drop-down list in the **ROADWAY STRUCTURE ID** field.	N/A
9	If applicable, select ***the Major Federal Work Code*** from the drop-down list in the **MAJOR FEDERAL WORK CODE** field.	N/A

NOTE: The **MAJOR FEDERAL WORK CODE** field is used only for federally funded projects.

10	Leave the **COMBINE LIKE CATEGORIES** check box checked.	N/A
11	If applicable, select ***Y*** or ***N*** from the drop-down list in the **CONSULTANT INDICATOR** field.	N/A
12	Select ***the Primary County*** from the drop-down list in the **PRIMARY COUNTY CODE** field.	N/A

Helpful Hint

The following 3 fields **(steps 13-15)** are required for correct reporting of construction lane miles.

13	Select ***the cross-section code*** from the drop-down list in the **CROSS SECTION CODE** field.	N/A
14	Type ***the roadway length in miles or km (not including length of structure)*** in the **LENGTH ALONG THE PROJECT (MILES/KILOMETERS)** field.	N/A
15	Type **the number of lanes** in the **NUMBER OF LANES** field.	N/A
16	Once you have entered all information for this category, click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Continued on Following Page

Categories

(continued)

🗁**NOTE:** If there is more than one structure on the project, a category will need to be set up for each structure.

Adding a Structure Category

From within a project, on the **Project Category and Item Summary** page, **Categories** tab:

Step	Action	Result
3	Click the **NEW** button.	Category input fields will appear.
4	Type **a 4-digit number** in the **CATEGORY ID** field. Begin at 0001.	N/A
5	Type ***STRUCTURE ITEMS*** in the **CATEGORY DESCRIPTION** field.	N/A
6	Select ***0004*** from the drop-down list in the **PROPOSAL SECTION NUMBER** field.	N/A
	The value in the **PROPOSAL SECTION NUMBER** field, controls which fields will appear on the right side of the page.	
7	Select ***ST*** from the drop-down list in the **FEDERAL CONSTRUCTION CLASS** field.	N/A
8	Select ***BR01*** from the drop-down list in the **ROADWAY STRUCTURE ID** field. 🗁**NOTE:** Multiple bridges in the same project should be numbered sequentially. (BR01, BR02, BR03…)	N/A

🗁**NOTE:** If part of the structure contains non-participating items, you will need to create a second Structure category.

In this category, the value in the **MAJOR FEDERAL WORK TYPE CODE** field should be ***NPAR***.

The value in the **ROADWAY/STRUCTURE ID** field should remain the same as the original.

Continued on Following Page

Categories

(continued)

9	If applicable, select ***the Major Federal Work Code*** from the drop-down list in the **MAJOR FEDERAL WORK CODE** field.	N/A

🗁**NOTE:** The **MAJOR FEDERAL WORK CODE** field is used only for federally funded projects.

10	Leave the **COMBINE LIKE CATEGORIES** check box checked.	N/A
11	If applicable, select ***Y*** or ***N*** from the drop-down list in the **CONSULTANT INDICATOR** field.	N/A
12	Select ***the Primary County*** from the drop-down list in the **PRIMARY COUNTY CODE** field.	N/A
13	Select ***the over/under code*** from the drop-down list in the **OVER/UNDER CODE** field.	N/A
14	Type ***the station ID*** in the **STATION ID** field.	N/A
15	Type ***the bridge number*** in the **BRIDGE NUMBER** field.	N/A
16	Type ***the length along the project*** in the **LENGTH ALONG THE PROJECT (MILES/KILOMETERS)** field.	N/A

🗁**NOTE:** The mileage should be calculated based on fill face to fill face length. For dual structures, only the longest structure mileage is used. This does not apply to rehab or preservation projects. Mileage is shown for all structures.

17	Type ***the out-to-out superstructure width measurement*** in the **OUT TO OUT SUPERSTRUCTURE WIDTH (FEET/METERS)** field.	N/A

Continued on Following Page

Categories

(continued)

18	Type ***the curb to curb superstructure width measurement*** in the **CURB TO CURB SUPERSTRUCTURE WIDTH (FEET/METERS)** field.	N/A
19	Type ***the length of the bridge*** in the **BRIDGE LENGTH (FEET/METERS)** field.	N/A
20	Type ***the number of spans*** in the **BRIDGE NUMBER OF SPANS** field.	N/A
21	Once you have entered all information for this category, click the **SAVE** button in the **Header Bar**.	A **Save Complete** message will appear above the **Header Bar**.

Adding a Category for Non-Participating Items

If you have non-participating items, you must create additional categories for each municipality/utility company/developer/railroad/etc.

From within a project, on the **Project Category and Item Summary** page, **Categories** tab:

Step	Action	Result
3	Click the **NEW** button.	Category input fields will appear.
4	Type **a sequential 4-digit number** in the **CATEGORY ID** field. Begin at 0001.	N/A
5	Type **ROADWAY/STRUCTURE ITEMS – NPAR (NAME)** in the **CATEGORY DESCRIPTION** field.	N/A
6	Select ***the applicable section number*** from the drop-down list in the **PROPOSAL SECTION NUMBER** field.	N/A

The value in the **PROPOSAL SECTION NUMBER** field, controls which fields will appear on the right side of the page.

Continued on Following Page

Categories

(continued)

7	Select ***the Federal Construction Class*** from the drop-down list in the **FEDERAL CONSTRUCTION CLASS** field.	N/A
8	Select ***the 4-character structure ID*** from the drop-down list in the **ROADWAY/STRUCTURE ID** field. 🗁**NOTE:** The value in this field should remain the same as the original.	N/A
9	Select **NPAR** from the drop-down list in the **MAJOR FEDERAL WORK CODE** field.	N/A
10	Leave the **COMBINE LIKE CATEGORIES** check box checked.	N/A
11	If applicable, select ***Y*** or ***N*** from the drop-down list in the **CONSULTANT INDICATOR** field.	N/A
12	Select ***the Primary County*** from the drop-down list in the **PRIMARY COUNTY CODE** field.	N/A

Leave the **LENGTH ALONG THE PROJECT** field blank.

13	Complete any other applicable fields that remain.	N/A
14	Once you have entered all information for this category, click the **SAVE** button in the **Header Bar**.	A **Save Complete** message will appear above the **Header Bar**.

Continued on Following Page

Categories

(continued)

🗁**NOTE:** If there is more than one culvert on the project, a category will need to be set up for each culvert.

Adding a Culvert Category

From within a project, on the **Project Category and Item Summary** page, **Categories** tab:

Step	Action	Result
3	Click the **NEW** button.	Category input fields will appear.
4	Type **a 4-digit number** in the **CATEGORY ID** field. Begin at 0001.	N/A
5	Type ***CULVERT ITEMS*** in the **CATEGORY DESCRIPTION** field.	N/A
6	Select ***0002*** from the drop-down list in the **PROPOSAL SECTION NUMBER** field.	N/A

The value in the **PROPOSAL SECTION NUMBER** field, controls which fields will appear on the right side of the page.

Step	Action	Result
7	Select ***CV*** from the drop-down list in the **FEDERAL CONSTRUCTION CLASS** field.	N/A
8	Select ***CV01*** from the drop-down list in the **ROADWAY STRUCTURE ID** field.	N/A
9	If applicable, select ***the Major Federal Work Code*** from the drop-down list in the **MAJOR FEDERAL WORK CODE** field.	N/A

🗁**NOTE:** The **MAJOR FEDERAL WORK CODE** field is used only for federally funded projects.

Step	Action	Result
10	Leave the **COMBINE LIKE CATEGORIES** check box checked.	N/A
11	If applicable, select ***Y*** or ***N*** from the drop-down list in the **CONSULTANT INDICATOR** field.	N/A

Continued on Following Page

Categories

(continued)

12	Select ***the Primary County*** from the drop-down list in the **PRIMARY COUNTY CODE** field.	N/A
13	Select ***the culvert code*** from the drop-down list in the **CULVERT CODE** field.	N/A
14	Type ***the station ID*** in the **STATION ID** field.	N/A
15	Type ***the culvert number*** in the **CULVERT NUMBER** field.	N/A
16	Type ***the barrel width measurement*** in the **SKEWED BARREL WIDTH IF OVER 20 FT (MILES/KILOMETERS)** field.	N/A
17	Type ***the height of the barrel*** in the **BARREL HEIGHT (FEET/METERS)** field.	N/A
18	Type ***the barrel span measurement*** in the **BARREL SPAN (FEET/METERS)** field.	N/A
19	Type ***the box length*** in the **BOX LENGTH (FEET/METERS)** field.	N/A
20	Type ***the fill depth*** in the **FILL DEPTH (FEET/METERS)** field.	N/A
21	Once you have entered all information for this category, click the **SAVE** button in the **Header Bar**.	A **Save Complete** message will appear above the **Header Bar**.

Continued on Following Page

Categories

(continued)

🗁**NOTE:** If there is more than one wall on the project, a new category will need to be set up for each wall.

Adding a Wall Category

From within a project, on the **Project Category and Item Summary** page, **Categories** tab:

Step	Action	Result
3	Click the **NEW** button.	Category input fields will appear.
4	Type **a 4-digit number** in the **CATEGORY ID** field. Begin at 0001.	N/A
5	Type ***WALL ITEMS*** in the **CATEGORY DESCRIPTION** field.	N/A
6	Select ***0003*** from the drop-down list in the **PROPOSAL SECTION NUMBER** field.	N/A
	The value in the **PROPOSAL SECTION NUMBER** field, controls which fields will appear on the right side of the page.	
7	Select ***WL*** from the drop-down list in the **FEDERAL CONSTRUCTION CLASS** field.	N/A
8	Select ***WL1*** from the drop-down list in the **ROADWAY STRUCTURE ID** field. 🗁**NOTE:** Multiple retaining walls in the same project should be numbered sequentially. (WL1, WL2, WL3…)	N/A
9	If applicable, select ***the Major Federal Work Code*** from the drop-down list in the **MAJOR FEDERAL WORK CODE** field.	N/A

🗁**NOTE:** The **MAJOR FEDERAL WORK CODE** field is used only for federally funded projects.

Continued on Following Page

Categories

(continued)

10	Leave the **COMBINE LIKE CATEGORIES** check box checked.	N/A
11	If applicable, select ***Y*** or ***N*** from the drop-down list in the **CONSULTANT INDICATOR** field.	N/A
12	Select ***the Primary County*** from the drop-down list in the **PRIMARY COUNTY CODE** field.	N/A
13	Select ***the type of retaining wall*** from the drop-down list in the **RETAINING WALL TYPE** field.	N/A
14	Type ***the station ID*** in the **STATION ID** field.	N/A
15	Select ***length of the wall*** from the drop-down list in the **WALL LENGTH (FEET/METERS)** field.	N/A
16	Type ***the average height measurement*** in the **AVERAGE HEIGHT (FEET/METERS)** field.	N/A
17	Once you have entered all information for this category, click the **SAVE** button in the **Header Bar**.	A **Save Complete** message will appear above the **Header Bar**.

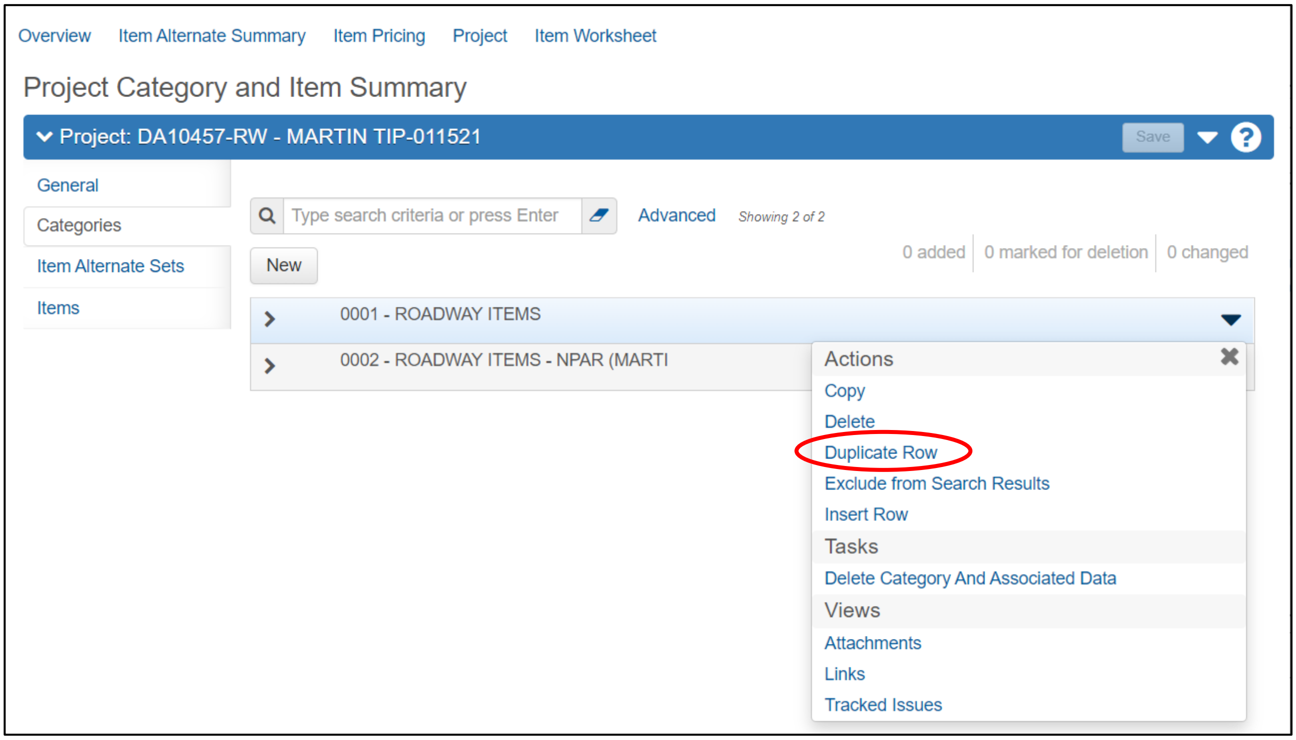
Continued on Following Page

Categories

(continued)

Copying a Category

The following procedure is useful if you need to create multiple structure, wall, or culvert categories.

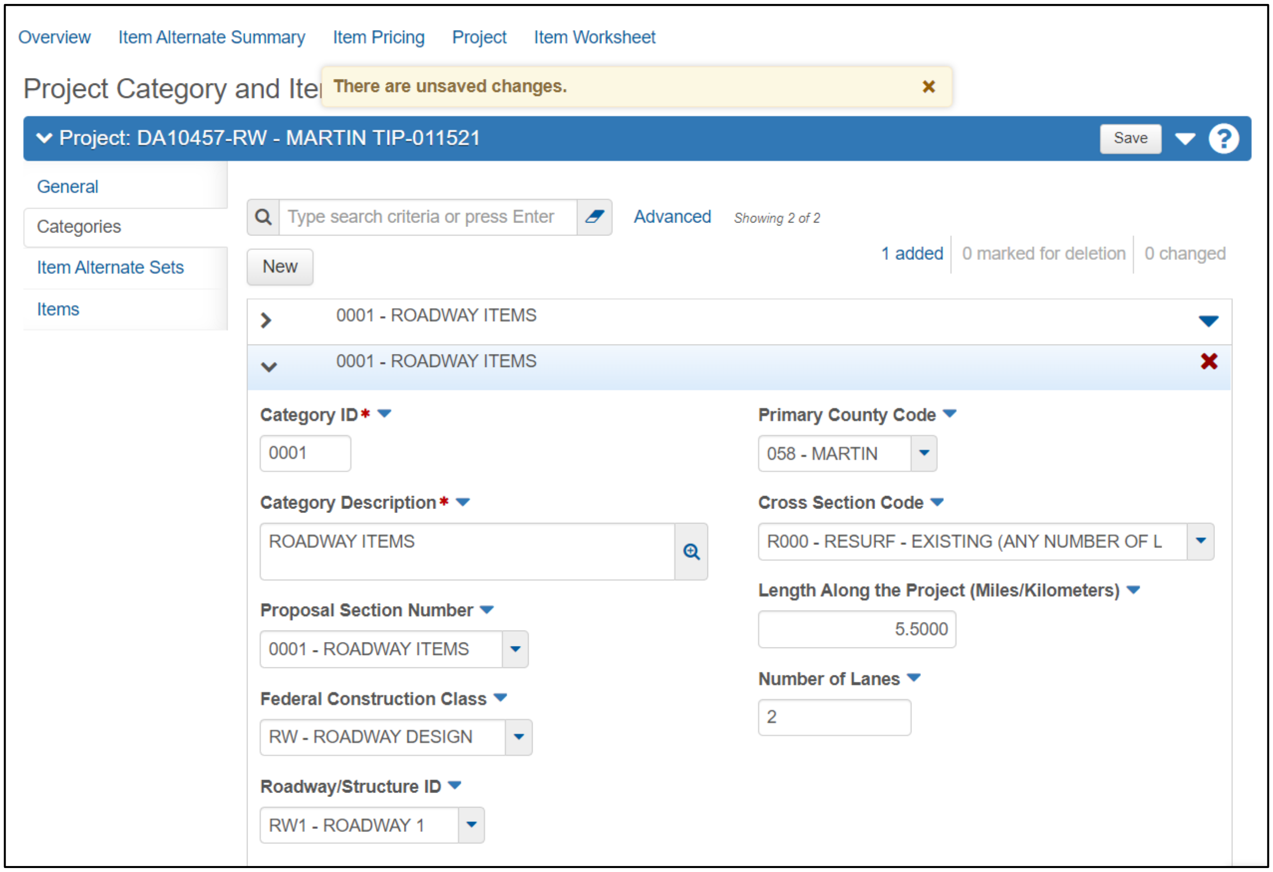


Step	Action	Result
1	Minimize the categories. (Click the arrow to the left of each category until all categories are displayed as one line.)	N/A
2	From the drop-down arrow at the right side of the **row containing the Category you wish to copy** select ***Duplicate Row***.	A new row will appear beneath the selected row.

Continued on Following Page

Categories

(continued)



3	Overwrite the number in the **CATEGORY ID** field with a ***new 4-digit sequential number***.	N/A
4	Change the remainder of the fields in the newly created category.	N/A
5	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

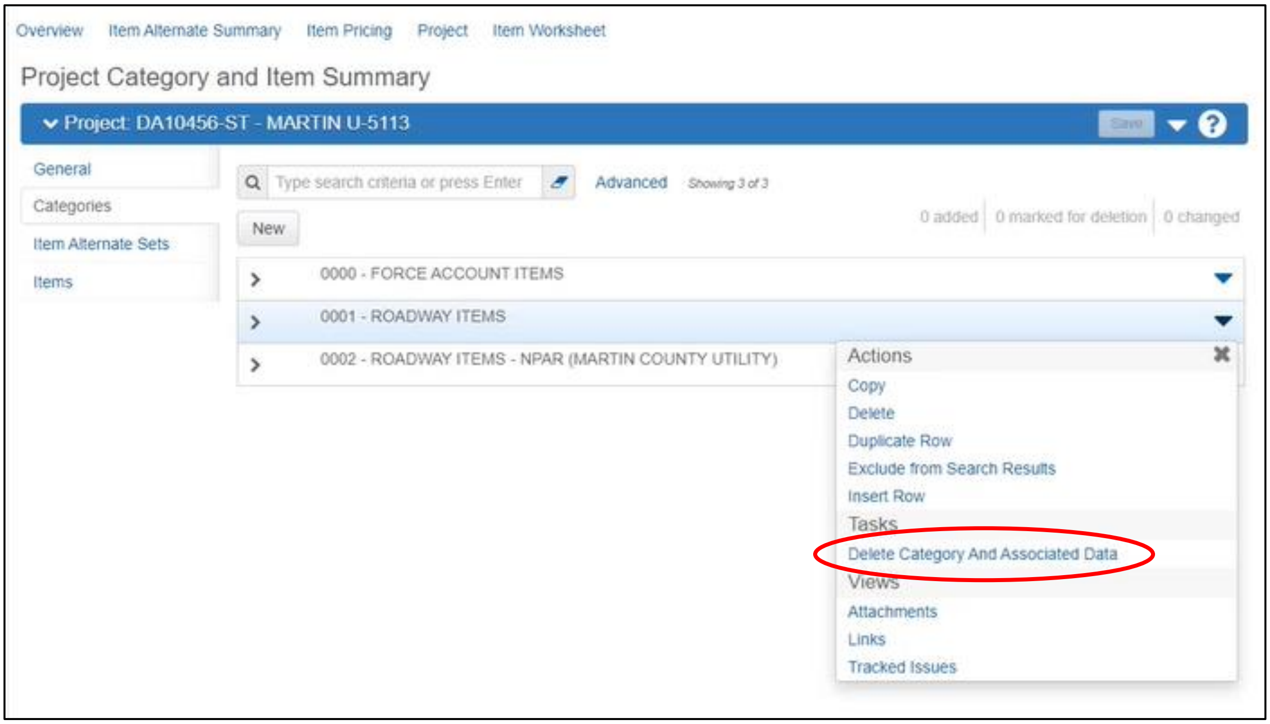
Continued on Following Page

Categories

(continued)

Deleting Categories

The following procedure is useful if you've copied a project and are changing its type. (i.e., Roadway to Structure)



Step	Action	Result
1	Minimize the categories. (Click the arrow to the left of each category until all categories are displayed as one line.)	N/A

Continued on Following Page

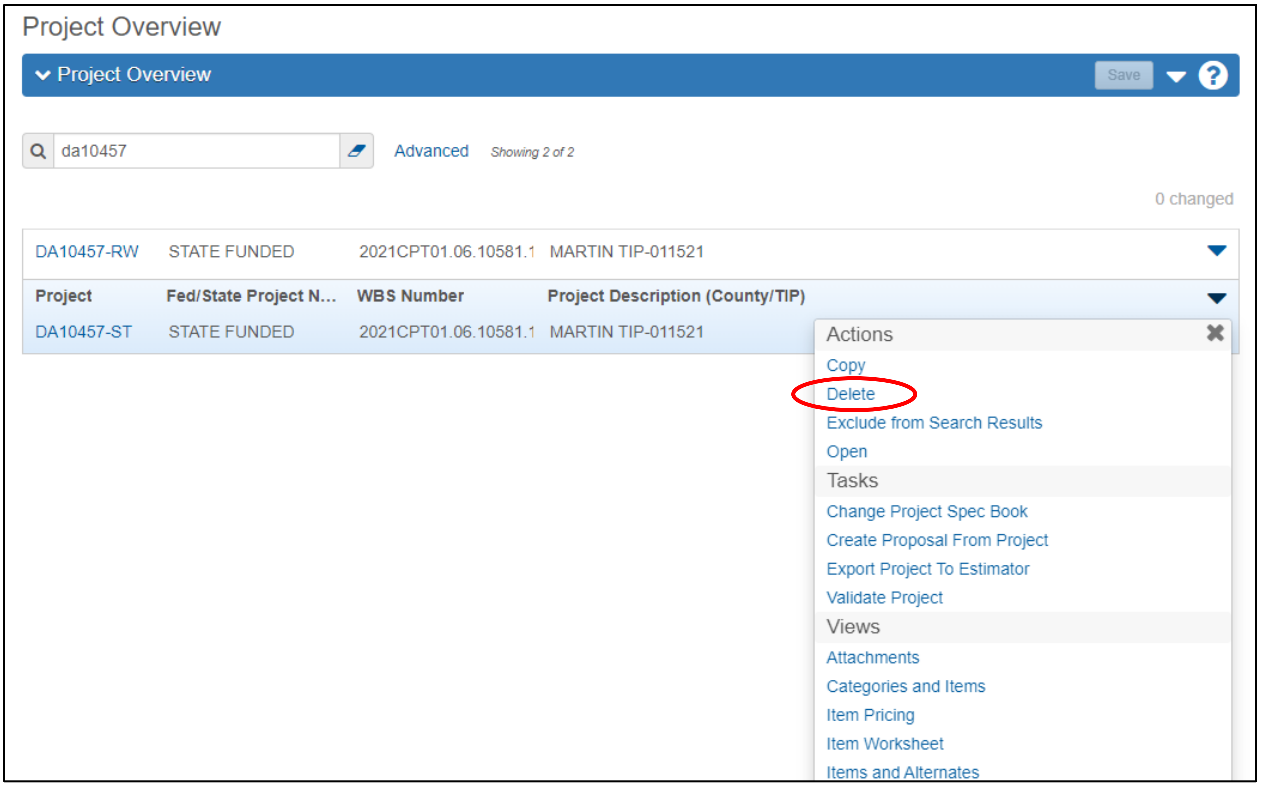
Categories

(continued)

2	From the drop-down arrow at the right side of the **row containing the Category you wish to delete** select ***Delete***. If you have items associated with this category, select **DELETE CATEGORY AND ASSOCIATED DATA**. 🗁**NOTE:** This will delete any items associated with the category.	The drop-down arrow for this category will change to an **undo arrow**. This indicates that the category is flagged for removal by the system.
3	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

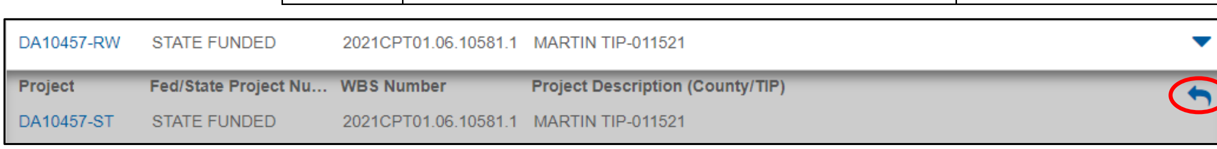
Deleting a Project

From the **Project Overview** page:



(*Project Overview Page*)

Step	Action	Result
1	From the drop-down arrow at the right side of the ***project you wish to delete*** select **DELETE**.	The drop-down arrow for this project will change to an **undo arrow**. This indicates that the project is flagged for removal by the system.



Continued on Following Page

Deleting a Project

(continued)

If you wish to **Undo** a deletion, you can click the **undo arrow** at the end of the deleted row. **You must do this before you save changes.**

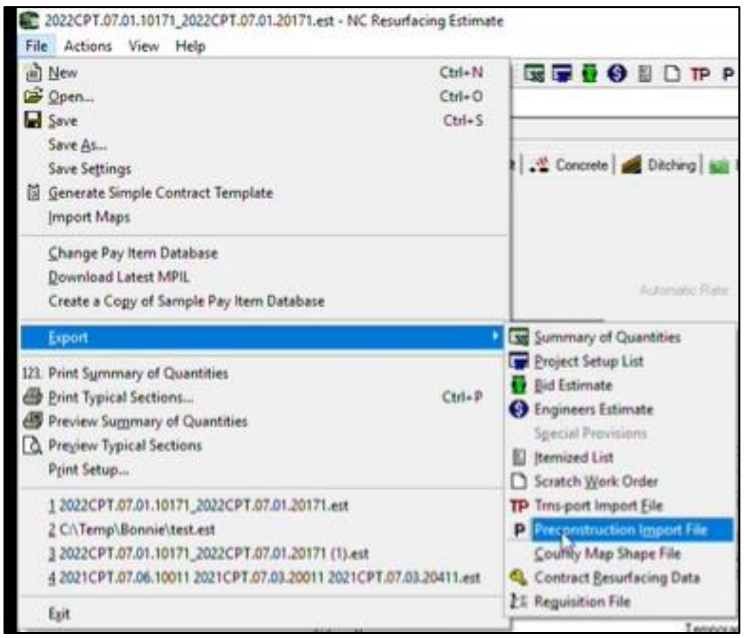
2	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar.**

Chapter 3 Quantity Estimation

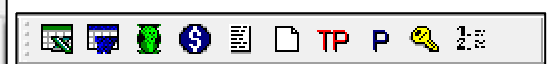
Exporting the Preconstruction File (from NC Resurfacing Estimate)

After creating an estimate file in **NC Resurfacing Estimate**, you will be able to export this file so that it can be imported into AASHTOWare.

From **NC Resurfacing Estimate**:



(File Menu)



(Export Toolbar)

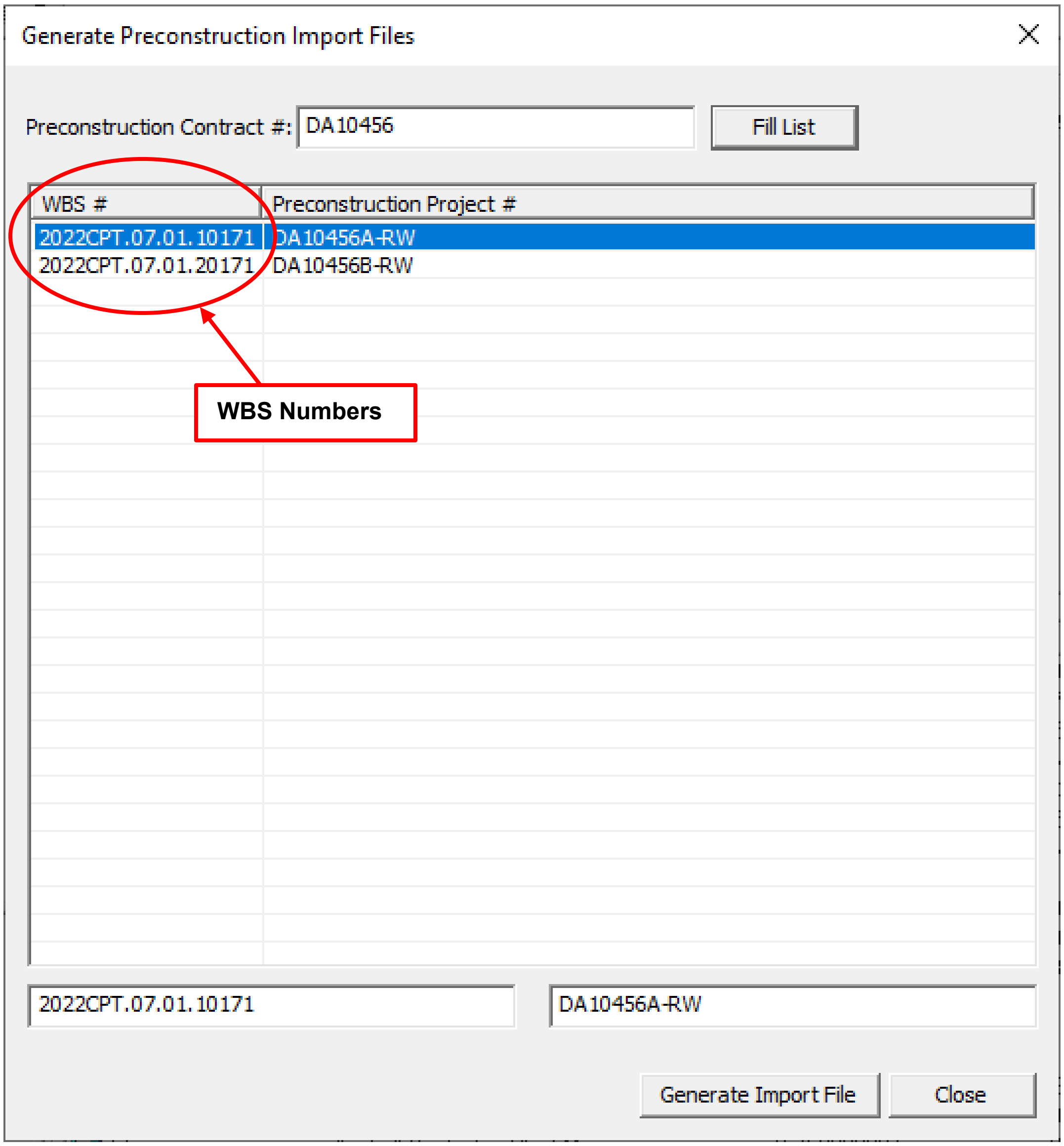
You will be able to begin this procedure either from the **File Menu** or from the **Export Toolbar**:

Step	Action	Result
1	From the **File Menu**, click EXPORT, then click PRECONSTRUCTION IMPORT FILE. OR From the **Export Toolbar**, click the P EXPORT PRECONSTRUCTION FILE button.	The following dialog will appear.

Continued on Following Page

Exporting the Preconstruction File (from NC Resurfacing Estimate)

(continued)



2	Type ***the contract number*** in the **PRECONSTRUCTION CONTRACT #** field.	N/A

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Exporting the Preconstruction File (from NC Resurfacing Estimate)

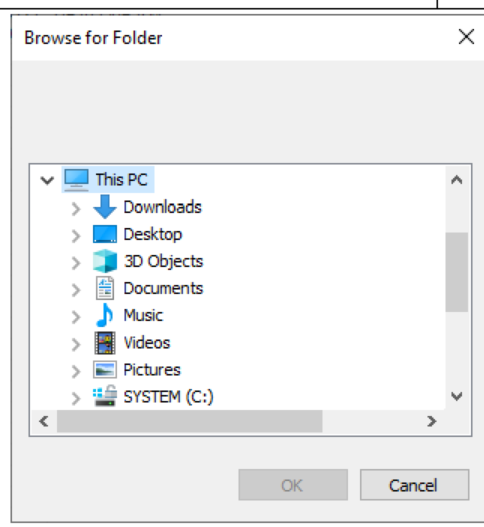
(continued)

3	Click the **FILL LIST** button.	The project number will appear in the list next to each WBS number.

For projects with multiple WBS numbers, an ordinal letter suffix (beginning with A and ending with Z) will appear after the numeric portion of the project number.

If the contract has more than 26 WBS numbers, the last digit of the contract number will increment by one and the ordinal letter suffix starts over with A.

4	If you need to edit the project number, select the project from the list. The project information will appear in the fields at the bottom of the popup where it can be edited.	N/A
5	To generate the Import File, click the **GENERATE IMPORT FILE** button at the bottom of the popup.	A dialog will appear that will prompt you to save the file in a specific location.

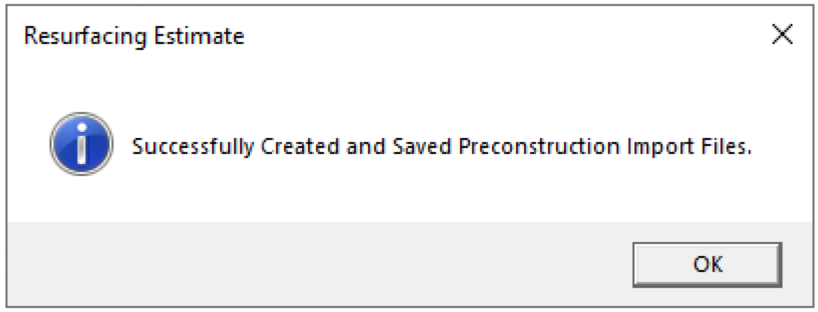


6	Select ***the directory where you want to save the file***, then click the **OK** button.	The following message will appear.

Continued on Following Page

Exporting the Preconstruction File (from NC Resurfacing Estimate)

(continued)



A separate file will be created for each project in the estimate.

The files will be named **[Estimate File Name]_[WBS].xml**

🗁**NOTE:** Because many types of payitems are combined, it is important to put extra emphasis on labeling all Generic Payitems with **Generic** clearly visible in the item description.

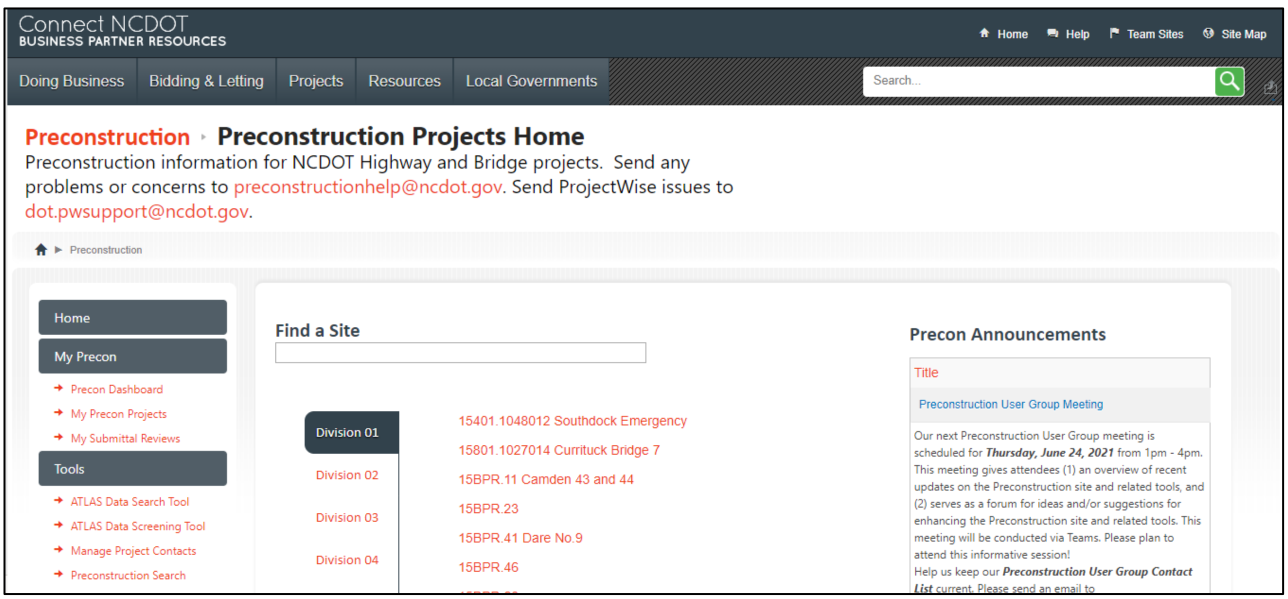
Exporting the Preconstruction File (from the PIQ Tool)

The Private Engineering Firms enter quantities and items using the Pay **Items and Quantities (PIQ)** tool.

You will be able to use this tool to export the preconstruction file for any projects that exist there.

To access the **PIQ** tool:

Step	Action	Result
1	In the address bar of your web browser, type [CONNECT.NCDOT.GOV/SITE/PRECONSTRUCTION/PAGES/DEFAULT.ASPX]() and press Enter.	The following page will appear.



(*Preconstruction Projects Home Page*)

2	In the FIND A SITE field, type the ***TIP*** or ***WBS*** number. As soon as you start typing in this field the results will auto filter in the drop-down.	N/A

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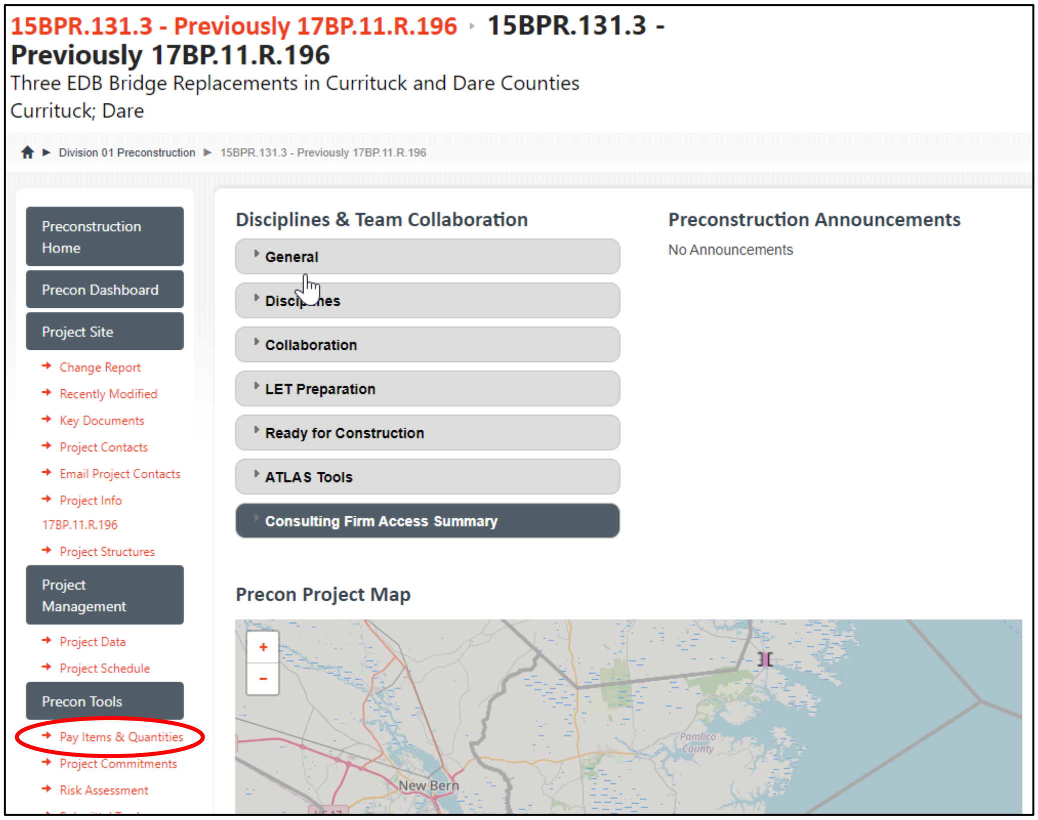
Exporting the Preconstruction File (from the PIQ Tool)

(continued)

3	Select ***the project number*** by clicking on it when it appears in the filtered list.	The project page will appear.



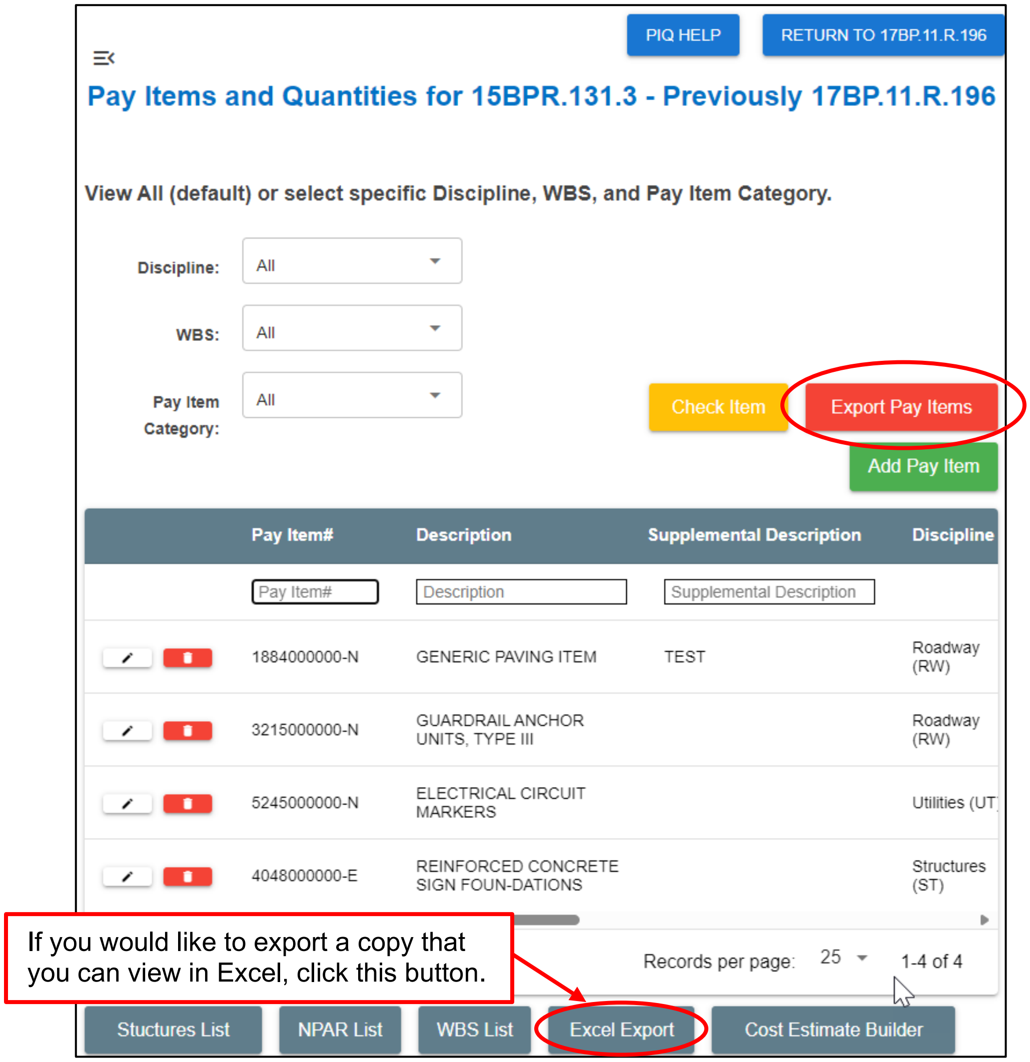
(*Preconstruction Project Page*)

4	Scroll to the bottom of the page and click **PAY ITEMS AND QUANTITIES** in the list on the left.	The **Pay Items and Quantities Tool** will appear.

Continued on Following Page

Exporting the Preconstruction File (from the PIQ Tool)

(continued)



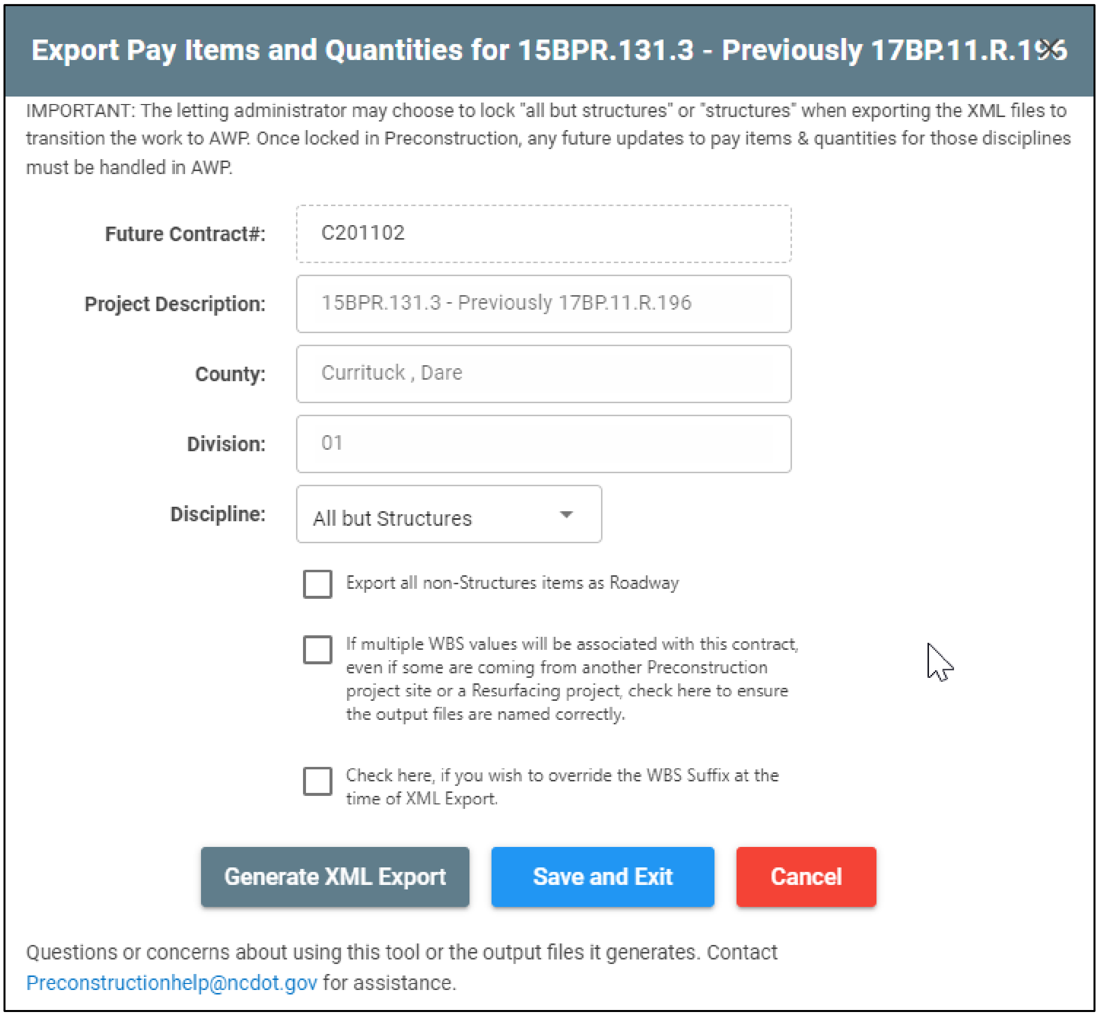
(*Pay Items and Quantities (PIQ Tool) Page*)

5	To create the export file, click the **EXPORT PAY ITEMS** button.	The following popup will appear.

Continued on Following Page

Exporting the Preconstruction File (from the PIQ Tool)

(continued)



(*Export Pay Items and Quantities Page*)

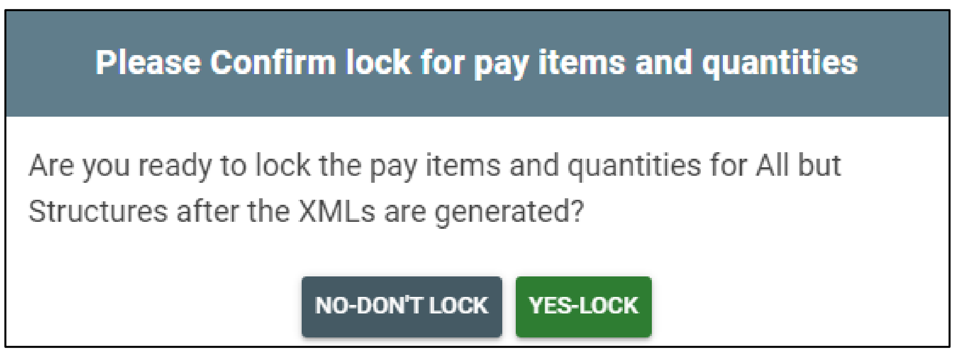
6	In the **FUTURE CONTRACT#** field, type ***the contract number the items need to be exported to***.	N/A
7	In the **DISCIPLINE** field, you will be able to select ***All but Structures*** or ***Structures***.	N/A

Continued on Following Page

Exporting the Preconstruction File (from the PIQ Tool)

(continued)

8	If you want all items not in the Structures category to be exported as Roadway items, make sure the **EXPORT ALL NON-STRUCTURES ITEMS AS ROADWAY** check box is checked. 🗁**NOTE:** Division projects should only be using Roadway and Structure Items.	N/A
9	If the project contains multiple WBS numbers, make sure the **IF MULTIPLE WBS VALUES WILL BE ASSOCIATED WITH THIS CONTRACT, EVEN IF SOME ARE COMING FROM ANOTHER PRECONSTRUCTION PROJECT SITE OR A RESURFACING PROJECT, CHECK HERE TO ENSURE THE OUTPUT FILES ARE NAMED CORRECTLY.** check box is checked.	N/A
10	Click the **GENERATE XML EXPORT** button.	The following dialog will appear.



Once the files are imported into AASHTOWare Project, it becomes the system of record, and all updates should be handled there.

Locking prevents having updates in 2 different systems.

11	Click the **YES-LOCK** button.	The file(s) will be created in your download folder.

Continued on Following Page

Exporting the Preconstruction File (from the PIQ Tool)

(continued)

If everything has been entered correctly, if there are multiple WBS numbers, multiple export files with the correct A, B, C… suffix should be created. They will be saved to your **DOWNLOADS** folder.

The file(s) will be in the format that AWP needs for the import. They won't need to be opened.

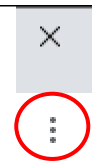
File Export Troubleshooting (PIQ Tool)

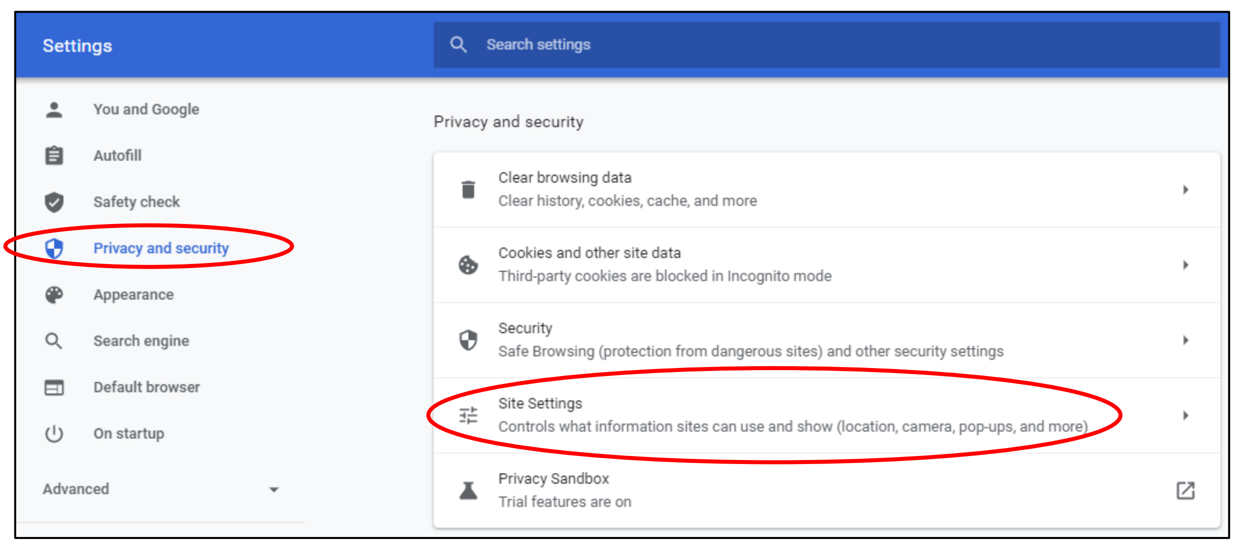
What if only one XML export file downloads?

If only one file downloads when multiple were expected, you will have to make a one-time setting change in your browser to permit multiple downloads without prompting in between.

You will need to tell your browser to trust the site: **connect.ncdot.gov** to download files to your computer.

In the Chrome browser, follow these steps:

Step	Action	Result
1	In the top, right corner of the browser, click the three vertical dots. 	The list of options will appear.
2	Select ***Settings*** from the list.	The **Chrome Settings** page will appear.
3	From the list of options on the left side of the page, select **PRIVACY AND SECURITY**.	N/A



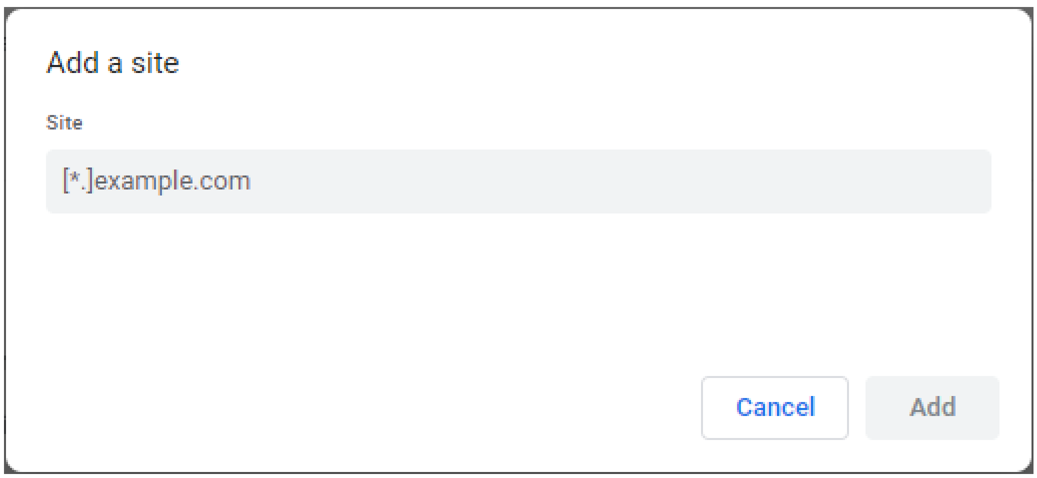
4	From the list of options that appears, select **SITE SETTINGS**.	N/A

Continued on Following Page

File Export Troubleshooting (PIQ Tool)

(continued)

5	Scroll to **PERMISSIONS** and click the drop-down arrow to the right of **ADDITIONAL PERMISSIONS**.	The list will expand.
6	Click **AUTOMATIC DOWNLOADS**.	**Automatic Download Options** will appear.
7	Click the **ADD** button to the right of **ALLOWED TO AUTOMATICALLY DOWNLOAD MULTIPLE FILES**.	The **Add a site** dialog will appear.

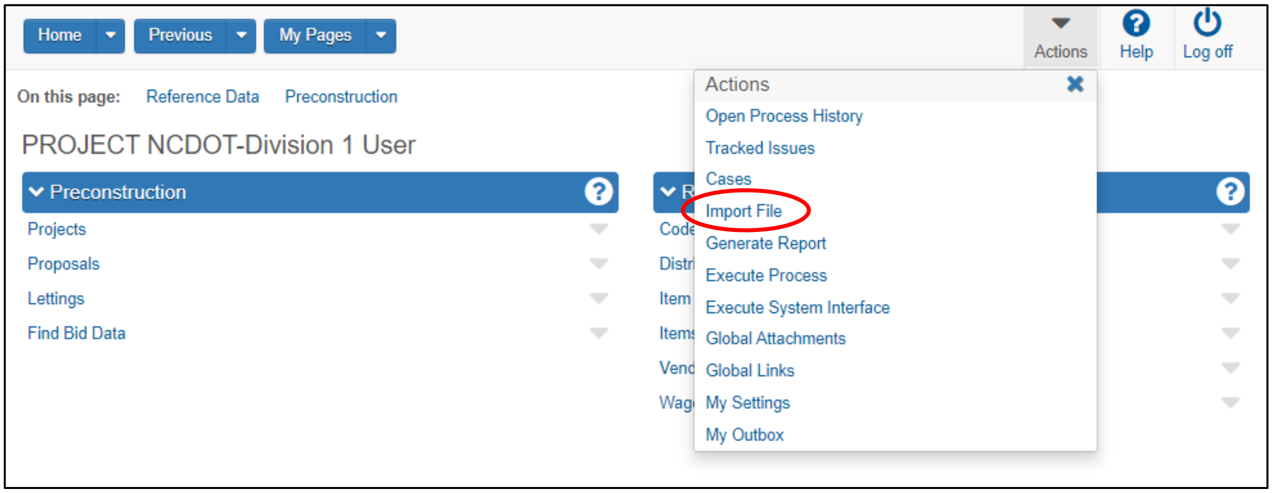


8	Type ***connect.ncdot.gov*** in the **SITE** field.	N/A
9	Click the **ADD** button.	**Connect.ncdot.gov** will appear beneath **ALLOWED TO AUTOMATICALLY DOWNLOAD MULTIPLE FILES**.

Importing the Preconstruction File into AWP

Regardless of whether you've exported the preconstruction file from **NC Resurfacing Estimate** or the **Pay Items and Quantities (PIQ) Tool**, the files will be in the same format (XML). It doesn't matter which application generates them; the loading process is the same.

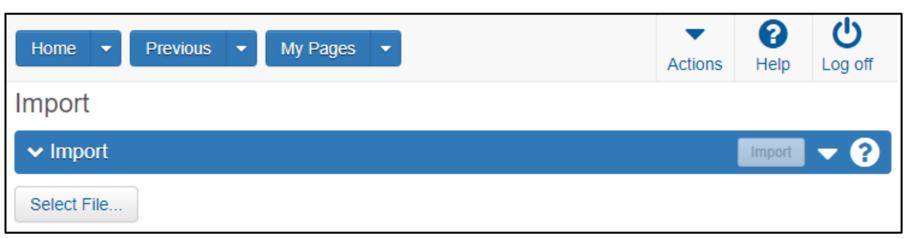
From the ***AASHTOWare Project Dashboard:***



(*AASHTOWare Project Dashboard – Actions Menu*)

Step	Action	Result
1	From the ACTIONS menu at the top of the window, select ***Import File***. 🗁**NOTE:** The ACTIONS menu appears wherever you are in the system, so you will be able to perform this procedure from any page.	The **Import** page will appear.

This load is based on the project information within file you choose, not the project you have open in AWP.



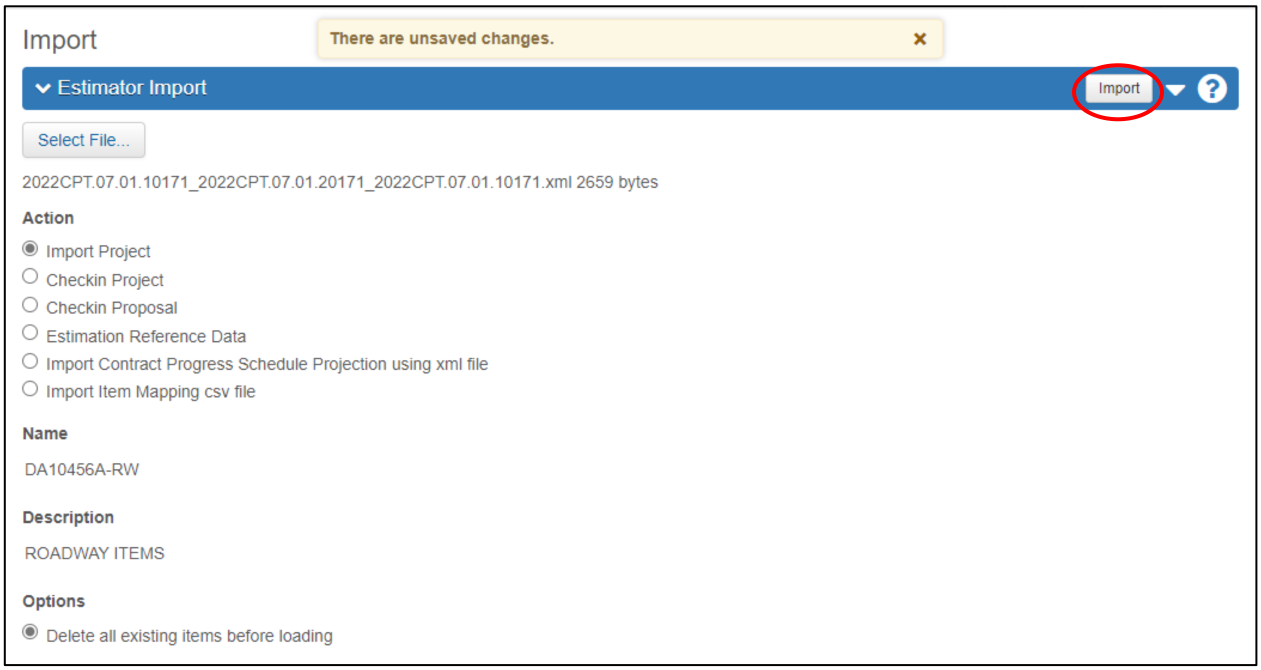
(*Import Page*)

Continued on Following Page

Importing the Preconstruction File into AWP

(continued)

2	Click the **SELECT FILE** button.	A dialog will appear that will prompt you to select the file from the location where you saved it.
3	Select the file and click the **OPEN** button.	Information about the file will appear.



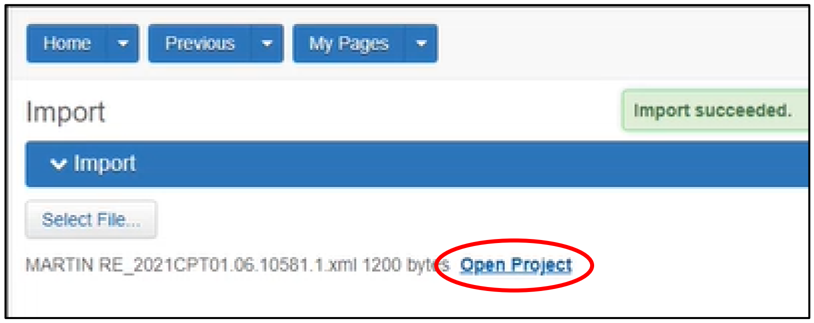
(*Import Information Page*)

4	Review the information on this page to make sure you've selected the correct project.	N/A
5	Click the **IMPORT** button in the **Header Bar**.	An ***Import Succeeded*** message will appear above the **Header Bar**.

Continued on Following Page

Importing the Preconstruction File into AWP

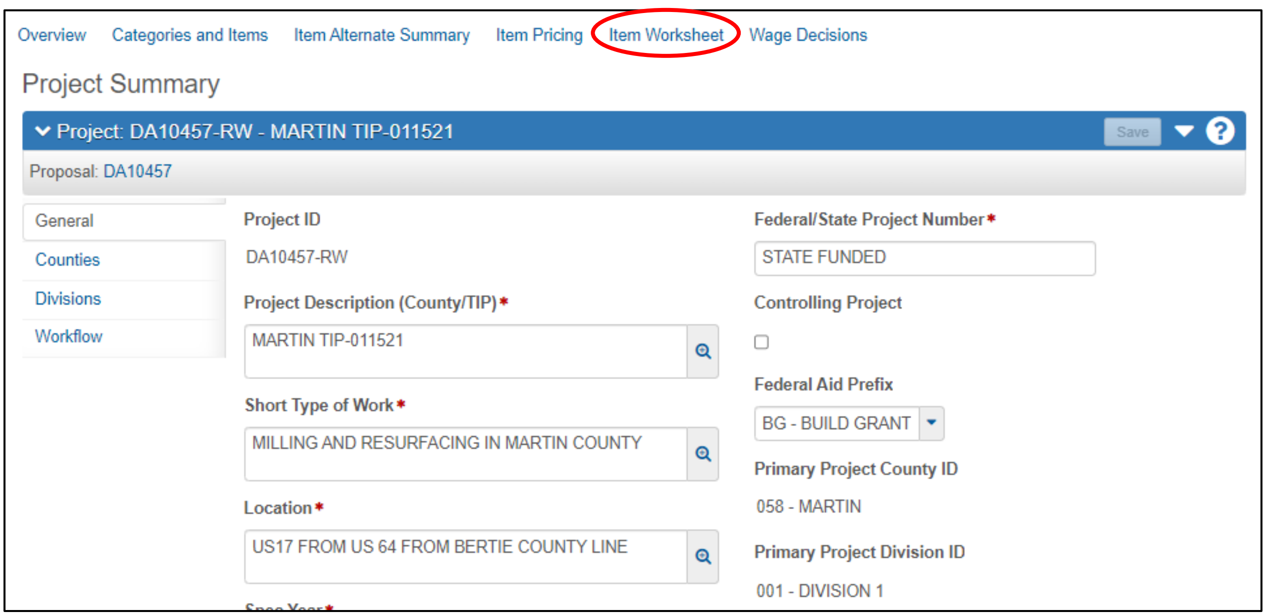
(continued)



(*Import Page*)

Once the file has been successfully imported, a link will be provided that will take you directly to the associated project.

6	Click the **OPEN PROJECT** link.	The **Project Summary** page will appear.



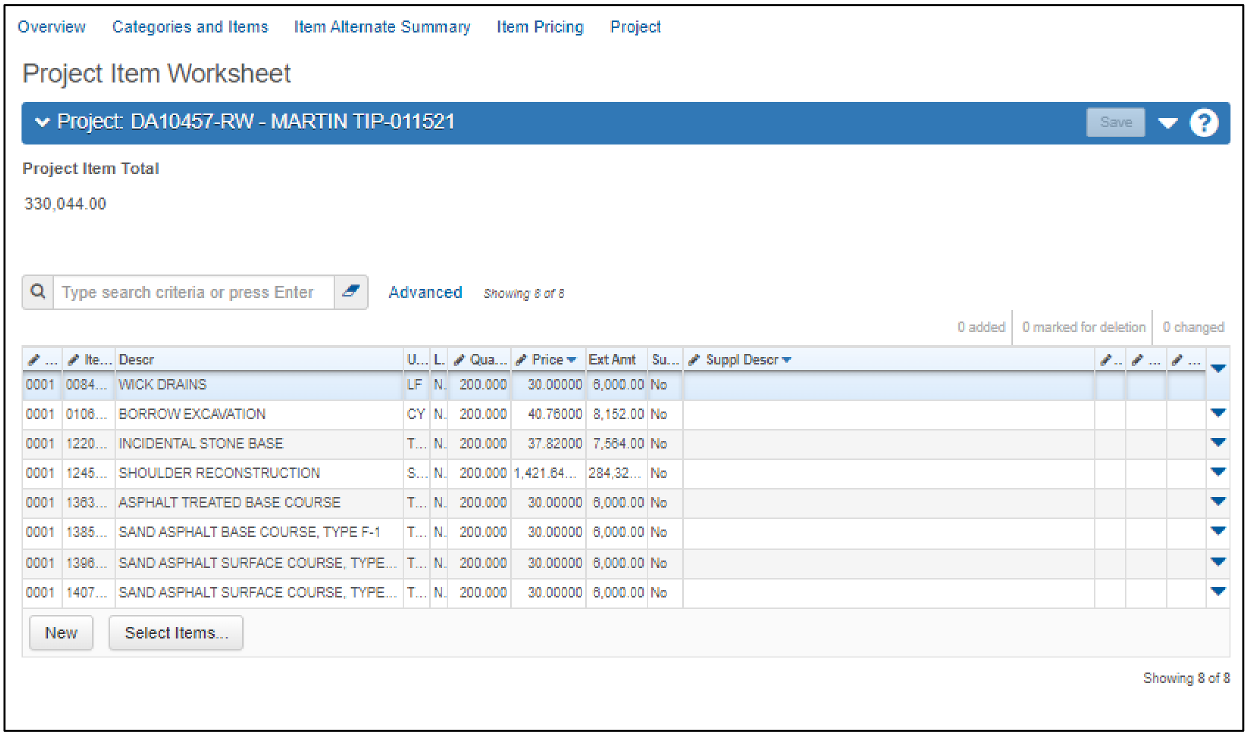
(*Project Summary Page*)

7	Click the **ITEM WORKSHEET** Quick Link.	The **Project Item Worksheet** page will appear.

Continued on Following Page

Importing the Preconstruction File into AWP

(continued)

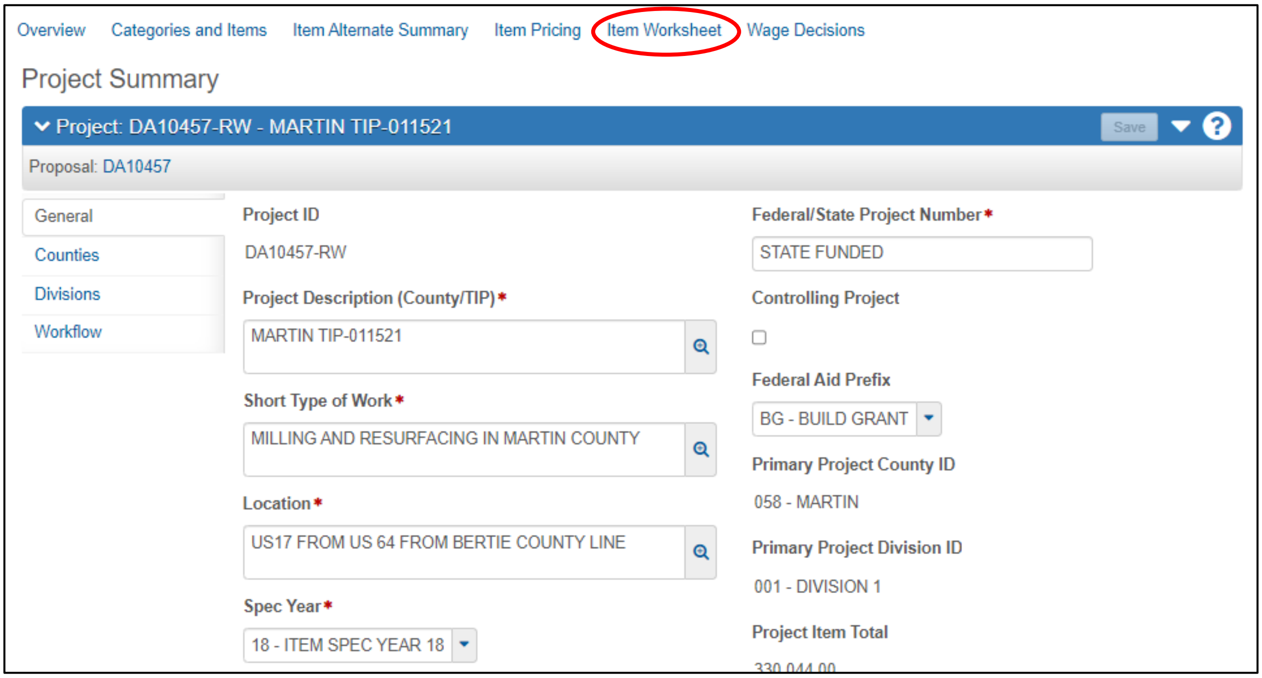


(*Project Item Worksheet Page*)

You will be able to add/edit items from this page.

Adding Items to a Project Manually

From within a project, on the **Project Summary** page:



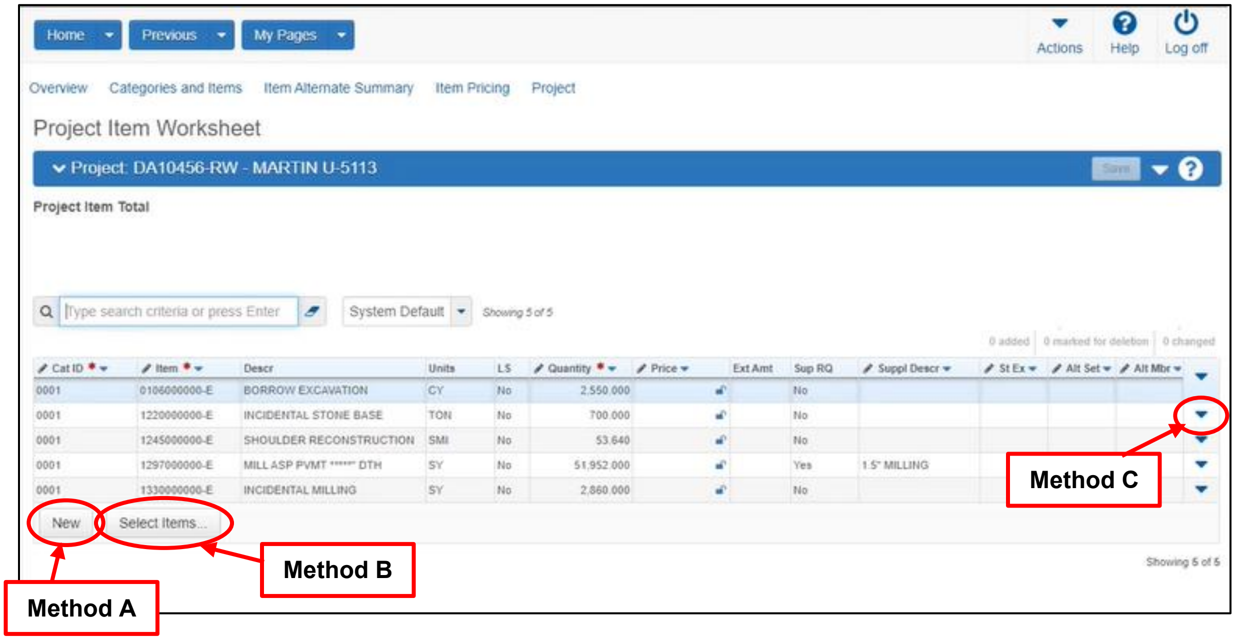
(*Project Summary Page*)

Step	Action	Result
1	Click the **ITEM WORKSHEET** Quick Link.	The **Project Item Worksheet** page will appear.

Continued on Following Page

Adding Items to a Project Manually

(continued)



(*Project Item Worksheet Page*)

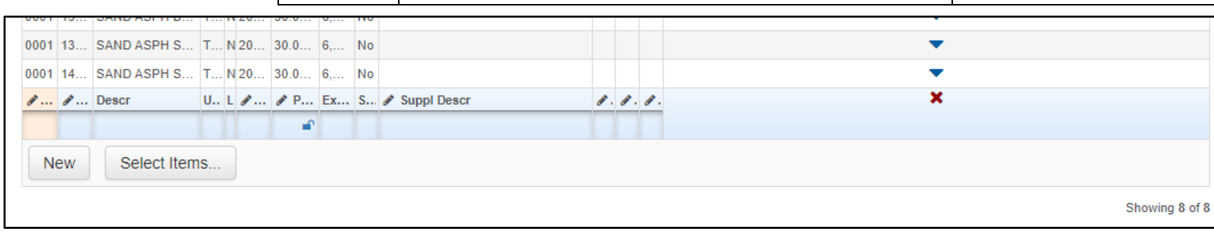
At this point there are three ways you can add items. (Steps 2-7)

A. Clicking the **NEW** button at the bottom of the list.
B. Clicking the **SELECT ITEMS** button. (from filtered list)
C. Adding a row and populating information for a single line item.

Use **A & C** for a few items. Use **B** if you are adding many items.

Method A

2	Click the **NEW** button at the bottom of the page.	A blank row will appear.



3	Double-click in the **CAT ID** field. Press the Enter key.	The **SEARCH** box will appear. A list of categories will appear.

Continued on Following Page

Adding Items to a Project Manually

(continued)

4	Click on the ***category*** to select it.	The selected category will appear in the **CATEGORY ID** field.
5	Double-click in the **ITEM** field.	The **SEARCH** box will appear.
6	Type ***all or part of the item name or number*** in the **SEARCH** box.	The list of items will auto filter from the criteria typed in the **SEARCH** box.

🗁**NOTE:** For generic items, include **generic** before your criteria.

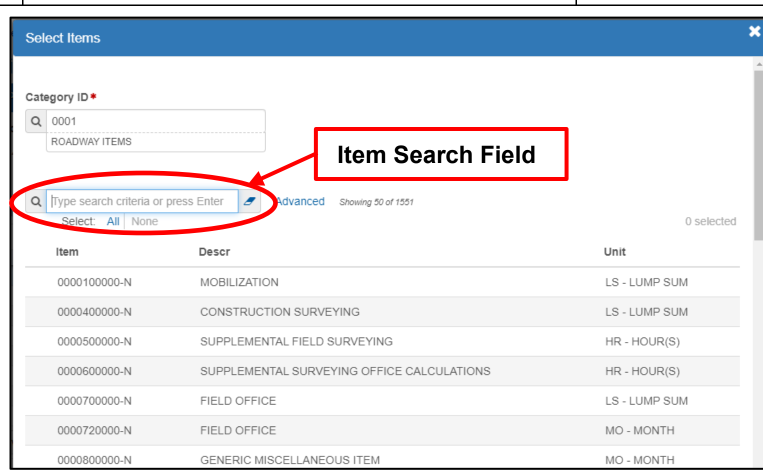
🗁**NOTE:** All **Force Account Items** begin with 9.

7	Click on ***the row containing the item you wish to select***.	The item information will be populated into the remaining fields.

Method B

Use this method if you have several items to add.

2	Click the **SELECT ITEMS** button at the bottom of the page.	The **Select Items** dialog will appear.



(*Select Items Dialog*)

Continued on Following Page

Adding Items to a Project Manually

(continued)

3	Click in the **CATEGORY ID** field.	A list of categories will appear.
4	Click on the ***category*** to select it.	The selected category will appear in the **CATEGORY ID** field.
5	Type ***all or part of the item name or number*** in the **ITEM SEARCH** field.	The list of items will auto filter from the criteria typed in the **ITEM SEARCH** field.

🗁**NOTE:** For generic items, include **generic** before your criteria.

🗁**NOTE:** All **Force Account Items** begin with 9.

6	Click on the row containing the item you wish to select to the left of the item number.	A green check will appear to the left of the selected item.

🗁**NOTE:** You may select as many items as are applicable before proceeding.

7	Click the **ADD TO PROJECT** button.	The item(s) will be added to the project. The **QUANTITY** field will appear highlighted.

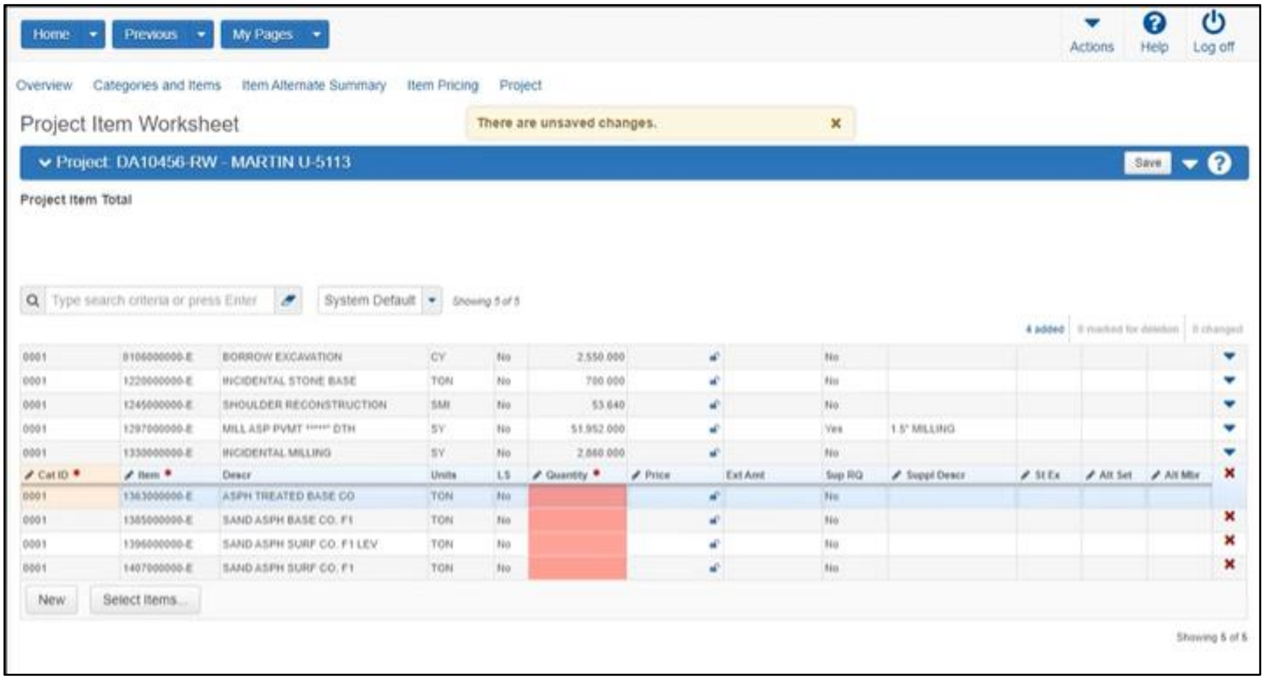
You will have to complete entry for all added items before you can save.

This means that if you have added a large quantity of items at once, you will have to enter all the quantities and supplemental descriptions (if applicable) before saving.

Continued on Following Page

Adding Items to a Project Manually

(continued)



(*Project Item Worksheet Page with New Items*)

Method C

2	Click the **drop-down arrow** at the end of the first row.	The following menu will appear.

3	Click the **Insert Rows Above** icon.	A blank row will be added at the top of the worksheet.

Continued on Following Page

Adding Items to a Project Manually

(continued)

4	Double-click in the **CAT ID** field. Press the Enter key.	The **SEARCH** box will appear. A list of categories will appear.
5	Click on the ***category*** to select it.	The selected category will appear in the **CATEGORY ID** field.
6	Double-click in the **ITEM** field.	The **SEARCH** box will appear.
7	Type ***all or part of the item name or number*** in the **SEARCH** box. 🗁**NOTE:** For generic items, include **generic** before your criteria. 🗁**NOTE:** All **Force Account Items** begin with 9. Click on the row containing the item you wish to select.	The list of items will auto filter from the criteria typed in the **SEARCH** box. The item information will be populated into the remaining fields.

8	Double click in the **QUANTITY** field or press Enter.	The following popup will appear.

9	Type the ***quantity of the item*** in the field provided and press Enter.	The popup will close, and the quantity will appear in the **QUANTITY** field.

Continued on Following Page

Adding Items to a Project Manually

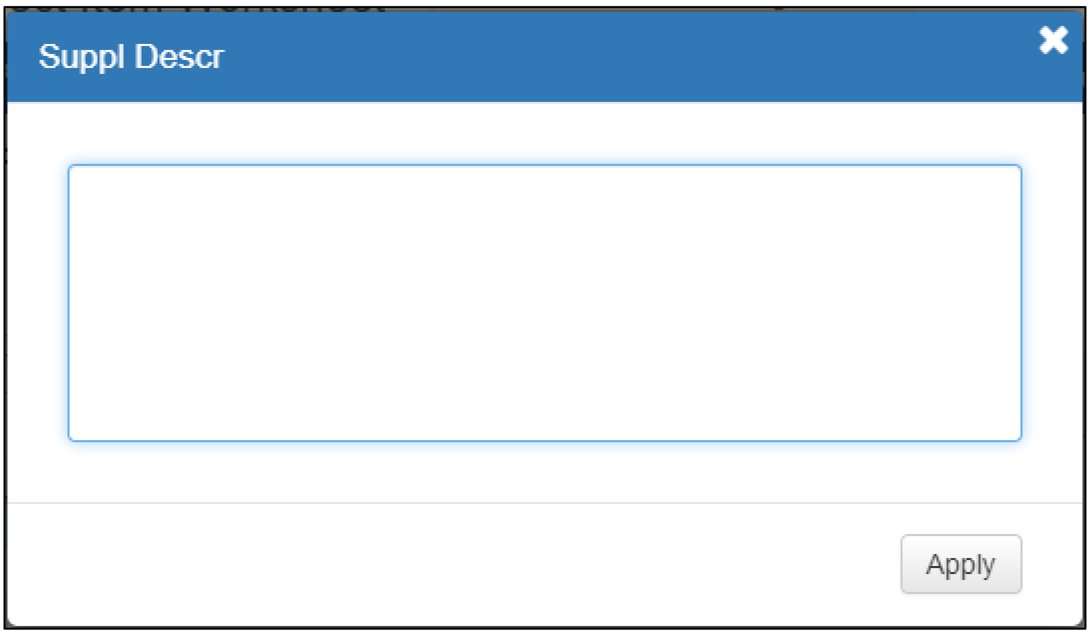
(continued)

Generic, Skeleton (Fill in the Blank), & Force Account Items

If you are adding a generic or force account item, you will also need to fill the **SUPPLEMENTAL DESCRIPTION** (**SUPPL DESCR**) field.

This is indicated by a **YES** in the **SUP RQ** field.

10	If you are adding a generic item, double-click in the **SUPPL DESCR** field.	The following popup will appear.



11	Type ***the supplemental description of the item*** in the field. (80 characters)	N/A

Force Account Items

For force account items, this should be in the following format:

MAT $XX, LAB $XX, EQUIP $XX or

XXSF AT $XX.XX PER SF (or XXM2 AT $XX.XX PER M2)

i.e., **MAT $2,500, LAB $500, EQUIP $500**
or **12.5M2 AT $125.27 PER M2**.

Continued on Following Page

Adding Items to a Project Manually

(continued)

12	Click the APPLY button.	The **supplemental description** will appear in the SUPPL DESCR field.
13	Click the SAVE button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

🗁**NOTE:** If you are working on a project with a lot of items, save your edits before loading the next 50 items. With so many items, the system may not be able to keep up with your edits unless you save frequently.

The items will be sorted based on item number.

🗁**NOTE:** For like items with supplemental descriptions to combine in the proposal and reports, the supplemental descriptions must match exactly. (This includes spaces and punctuation.)

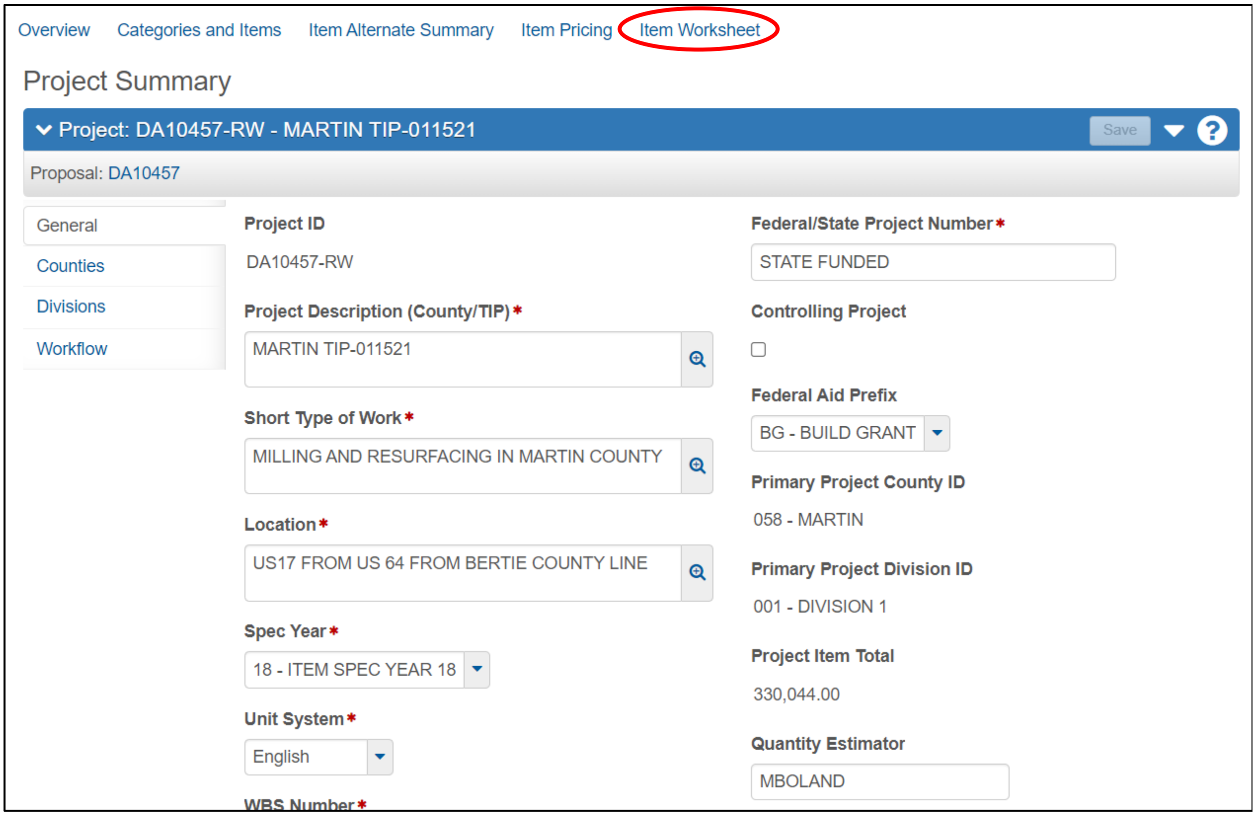
Repeat this procedure to add additional items.

Copying an Item

This procedure is useful when you have Generic or Skeleton items.

You will be able to copy an existing item and change the Supplemental Description.

From within a project, on the **Project Summary** page:



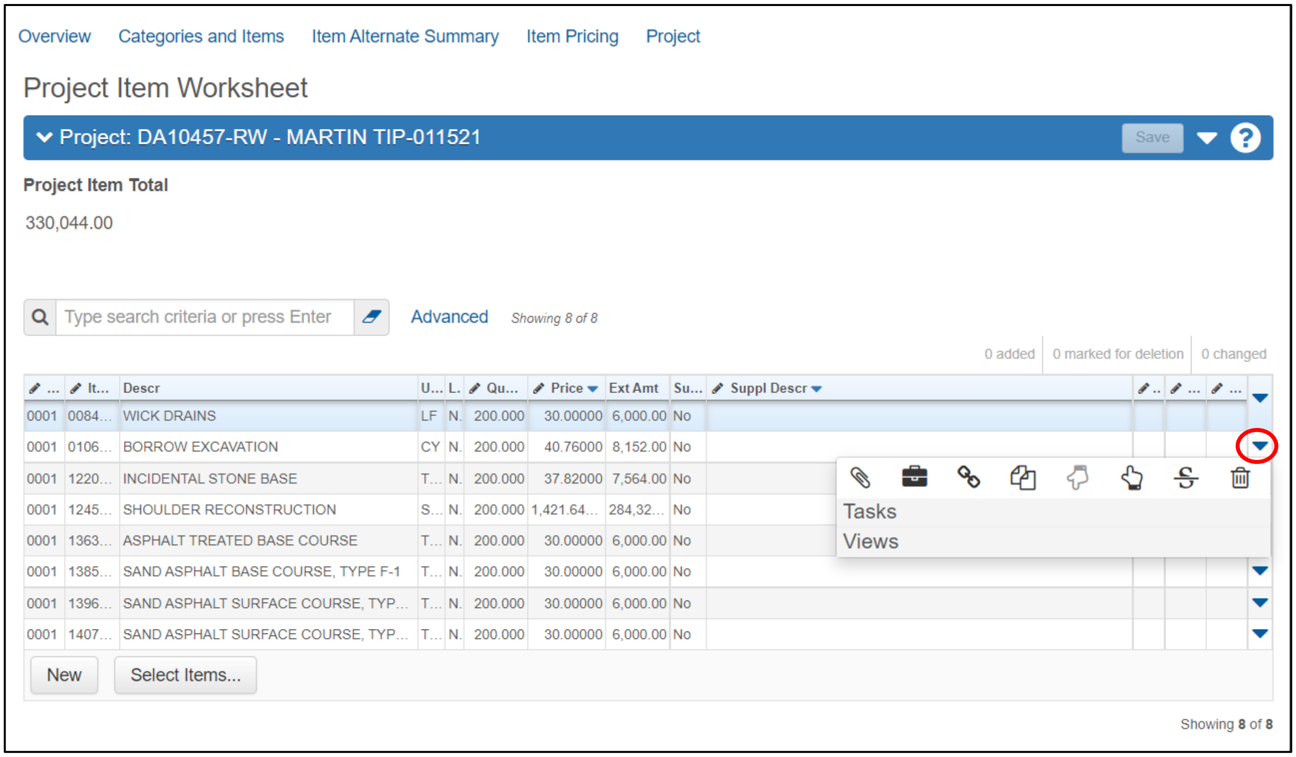
(*Project Summary Page*)

Step	Action	Result
1	Click the **ITEM WORKSHEET** Quick Link.	The **Project Item Worksheet** page will appear.

Continued on Following Page

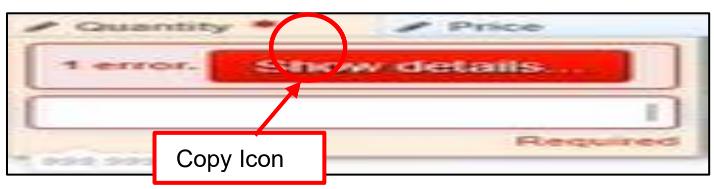
Copying an Item

(continued)



(Project Item Worksheet Page)

2	Click the **drop-down arrow** at the end of the row containing the item you wish to copy.	The following menu will appear.

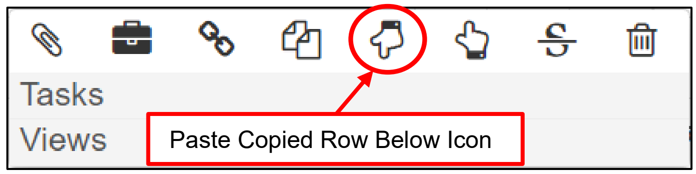


3	Click the **COPY** icon.	The row will be copied to the clipboard.
4	Click the drop-down arrow at the end of the row you would like to paste the copied record beneath.	The following menu will appear.

Continued on Following Page

Copying an Item

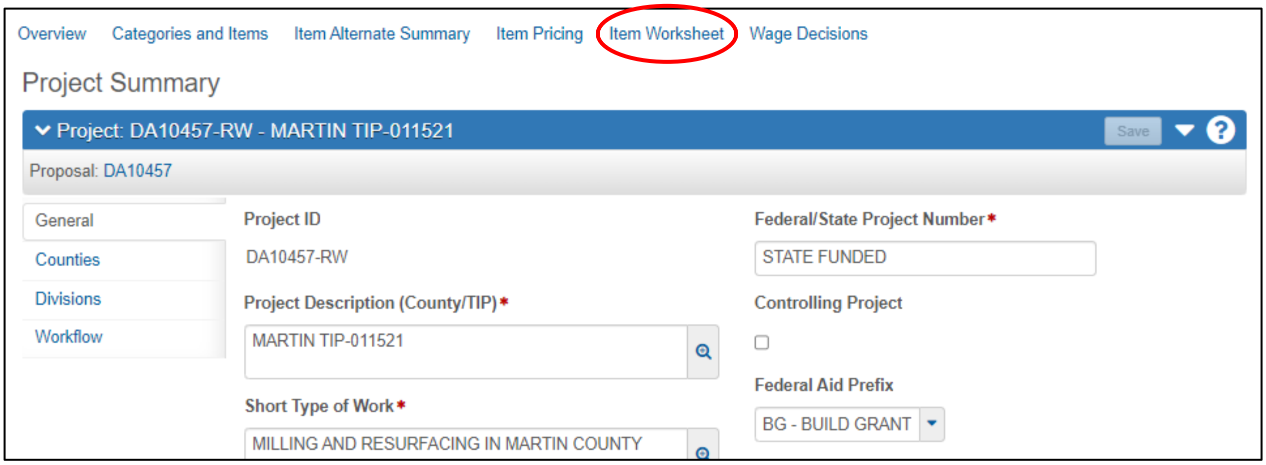
(continued)



5	Click the **PASTE COPIED ROW BELOW** icon.	The row will be pasted beneath the designated row.
6	You will be able to double click to edit any fields that need to be changed.	N/A
7	After you've made all necessary changes, click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

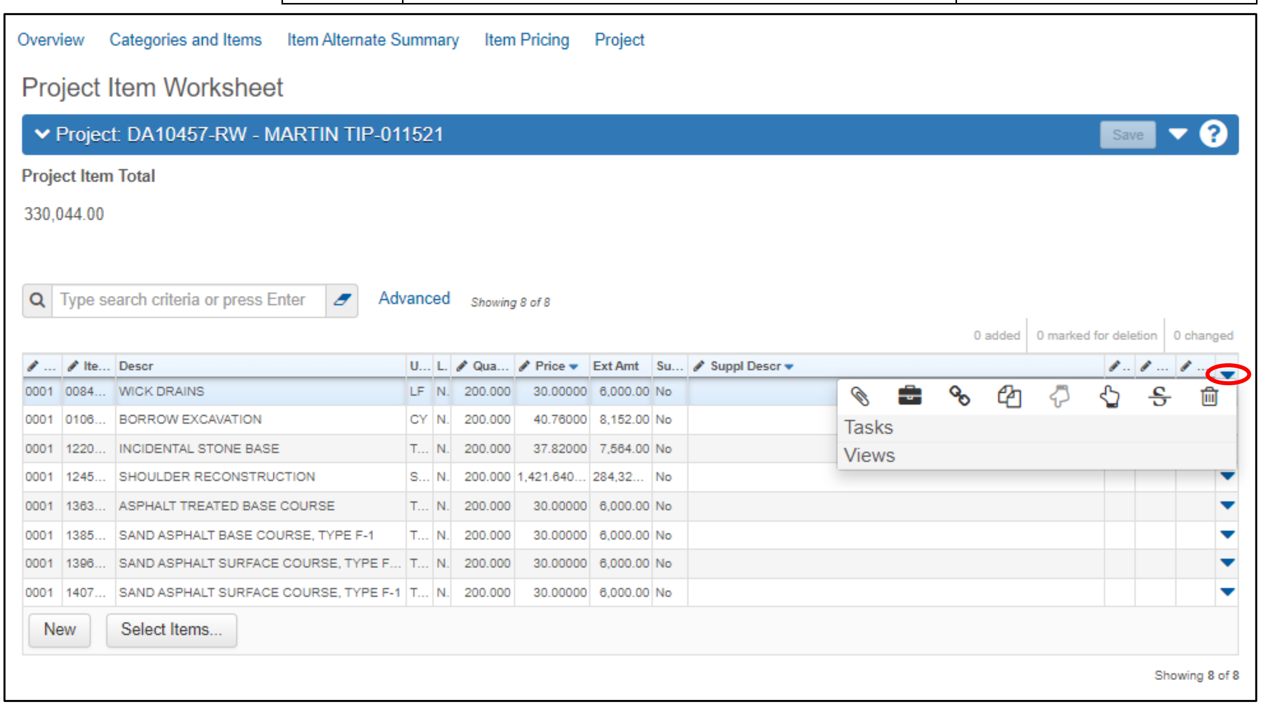
Deleting Items

From within a project, on the **Project Summary** page:



(*Project Summary Page*)

Step	Action	Result
1	Click the **ITEM WORKSHEET** Quick Link.	The **Project Item Worksheet** page will appear.



(*Project Item Worksheet Page*)

Continued on Following Page

Deleting Items

(continued)

2	Click the **drop-down arrow** at the end of the row containing the item you wish to delete.	The following menu will appear.

3	Click the **Delete** icon.	The row will be marked for deletion.

Repeat this procedure for any additional items you wish to delete.

If you wish to **Undo** a deletion, you can click the  icon at the end of the deleted row. **You must do this before you save changes.**

4	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Editing Item Information

If you do not want to delete an item, you only need to edit it, you will be able to double-click the field you wish to edit and change the value in the field.

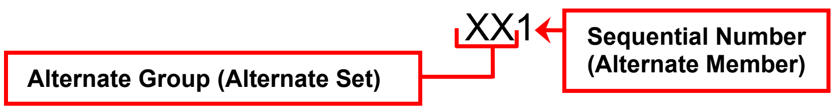
Be sure to save your changes before continuing.

Alternate Items

In certain situations, contractors are given the option of selecting between multiple items to bid. The way to indicate this is with the **ALTERNATE CODE** field.

The **Alternate Code** is used to differentiate between groups of alternates and alternates within a group. The first two characters identify the **alternate group,** and the third character identifies the **alternate number**.

For example, to define two items as alternates for one another, the user would enter **AA1** in the **ALT CODE** field for the first item and **AA2** in the **ALT CODE** field for the second item. The fact that both codes begin with **AA** indicates that a bidder should choose among them.

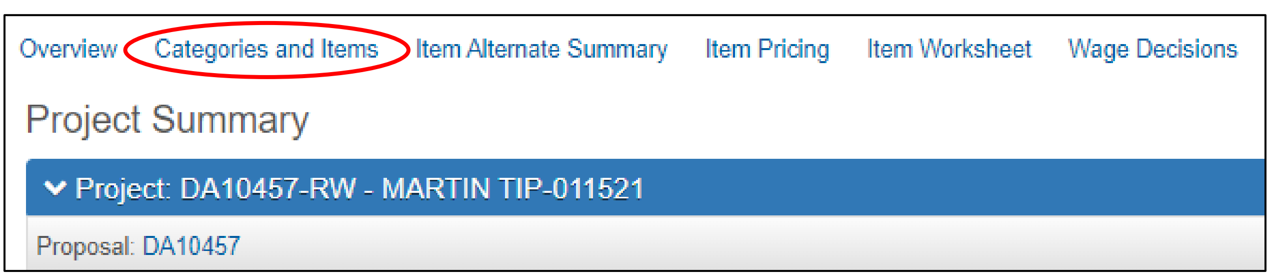


If a contractor is allowed to choose between 3 different items, for each **ITEM NUMBER**, the **ALTERNATE CODE** fields need to be filled with codes **XX1**, **XX2**, and **XX3**.

Item Number Example (Single)	Alternate Code Example
0312000000-E	AA1
0315000000-E	AA2
Item Number Example (Group)	**Alternate Code Example**
0315000000-E 0316000000-E	AB1 AB1
0376000000-E 0377000000-E	AB2 AB2

If the project contains **Alternate Items**, they will need to be set up.

From within a project, on the **Project Summary** page:

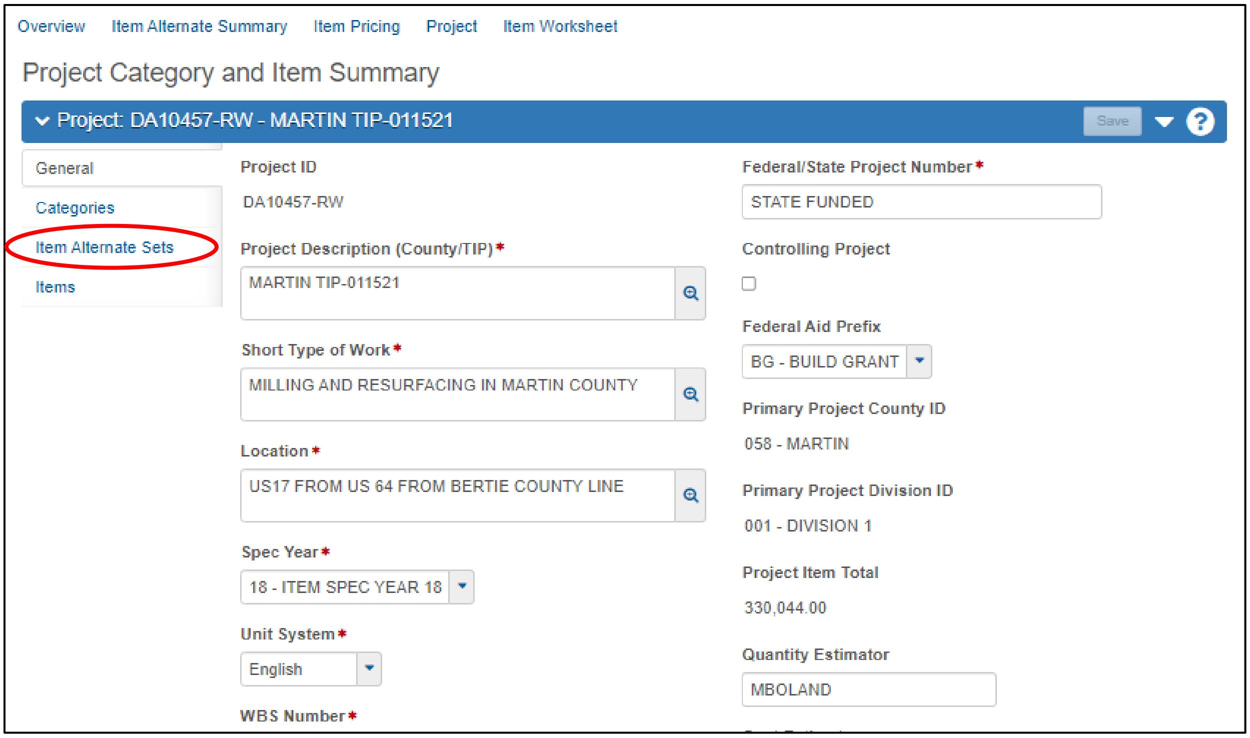


Continued on Following Page

Alternate Items

(continued)

Step	Action	Result
1	Click the **CATEGORIES AND ITEMS** quick link.	The **Project Category and Item Summary** page will appear.



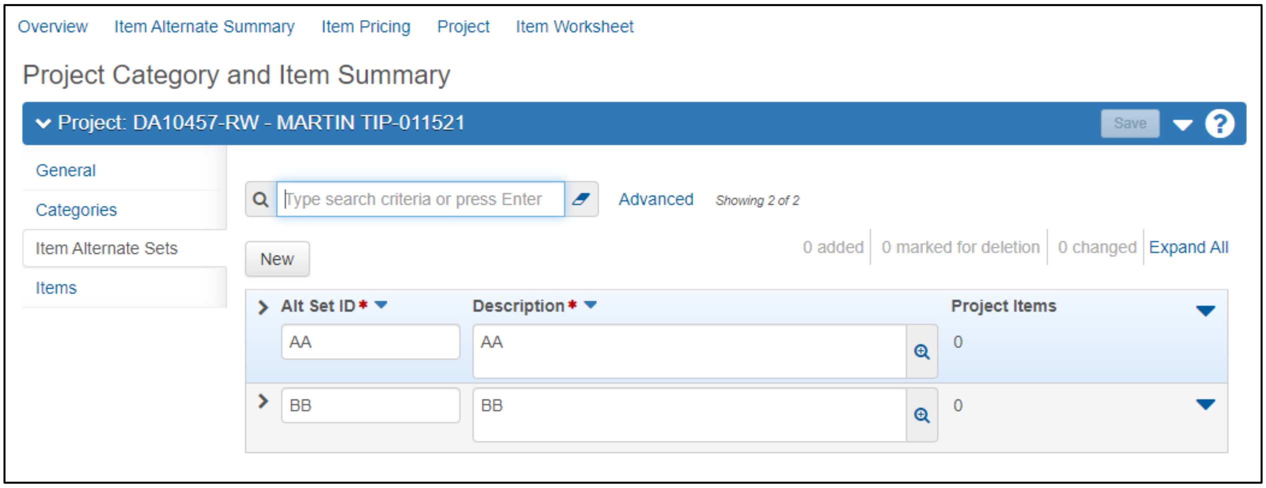
(*Project Category and Item Summary Page – General Tab*)

2	Click the **Item Alternate Sets** tab.	The **Item Alternate Sets** tab will appear.

Continued on Following Page

Alternate Items

(continued)



3	Type the ***2-letter alternate set*** in the **ALT SET ID** field.	N/A
4	Type ***a brief description*** in the **DESCRIPTION** field.	N/A

Helpful Hint

It is recommended to repeat the value from the **ALT SET ID** field in the **DESCRIPTION** field.

Repeat **steps 3 and 4** for each **Alternate Set**.

NOTE: To create more than one **Alternate Set**, you will need to click the **NEW** button to generate a new row.

5	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Flagging Items As Alternate

Once this procedure has been completed, you will be able to flag items as alternates of each other. There are two ways to do this:

A. From the **Project Item WorkSheet**.
B. From the **Project Item Alternate Summary** page.

Continued on Following Page

Alternate Items

(continued)

Method A

Step	Action	Result
1	Enter Item information normally. (See **Adding Items to a Project Manually** on **Page 3-17**.)	N/A
2	For an alternate item, double-click the **ALT SET** field.	The **SEARCH** box will appear.
3	Press the Enter key.	The list of **Alternate Sets** will appear. These are the values you entered in the previous procedure.
4	Select an ***Alternate Set*** from the list.	The **Alternate Set** selected will appear in the **ALT SET** field.
5	Double-click the **ALT MBR** field.	The **SEARCH** box will appear.
6	Type the ***1-digit Alternate Member*** in the **SEARCH** box and press the Enter key.	The **Alternate Member** will appear in the **ALT MBR** field.
	Repeat these steps for each **Alternate Item**.	
7	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar.**

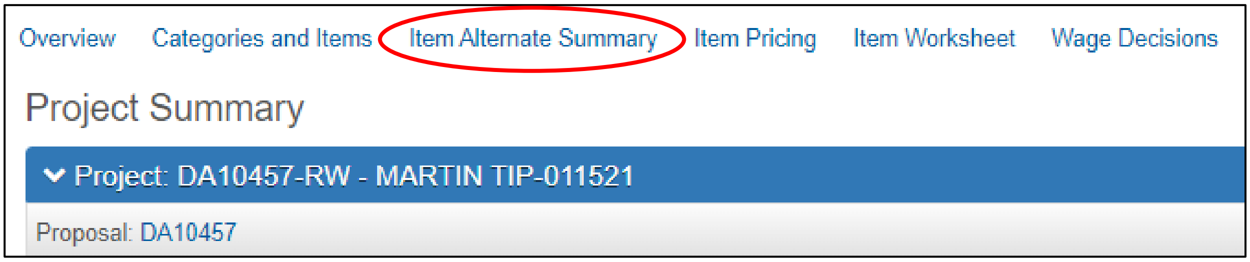
Continued on Following Page

Alternate Items

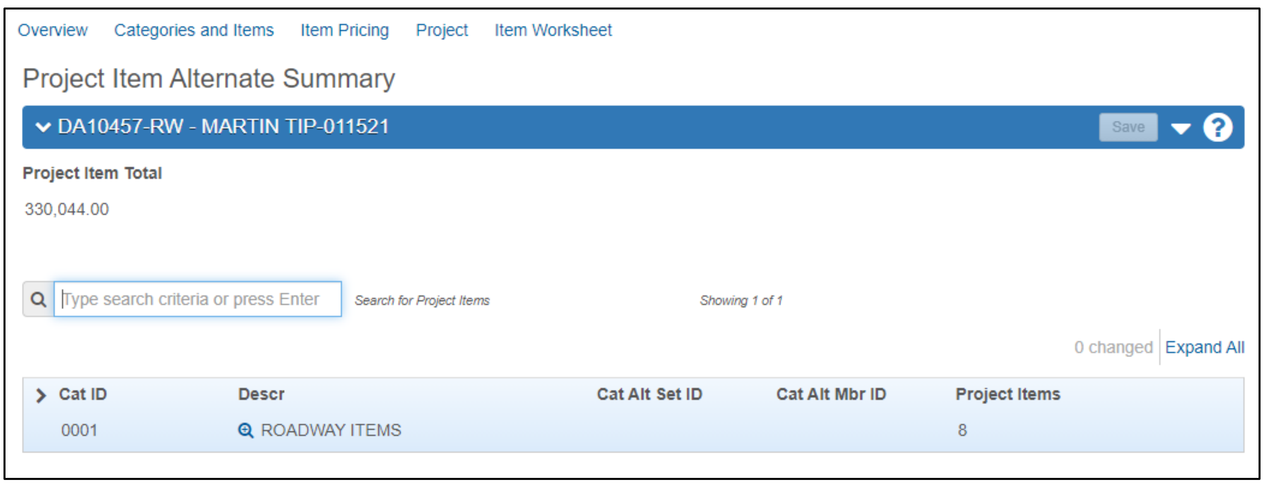
(continued)

Method B

From the **Project Summary** page:



Step	Action	Result
1	Click the **ITEM ALTERNATE SUMMARY** Quick Link.	The **Project Item Alternate Summary** page will appear.

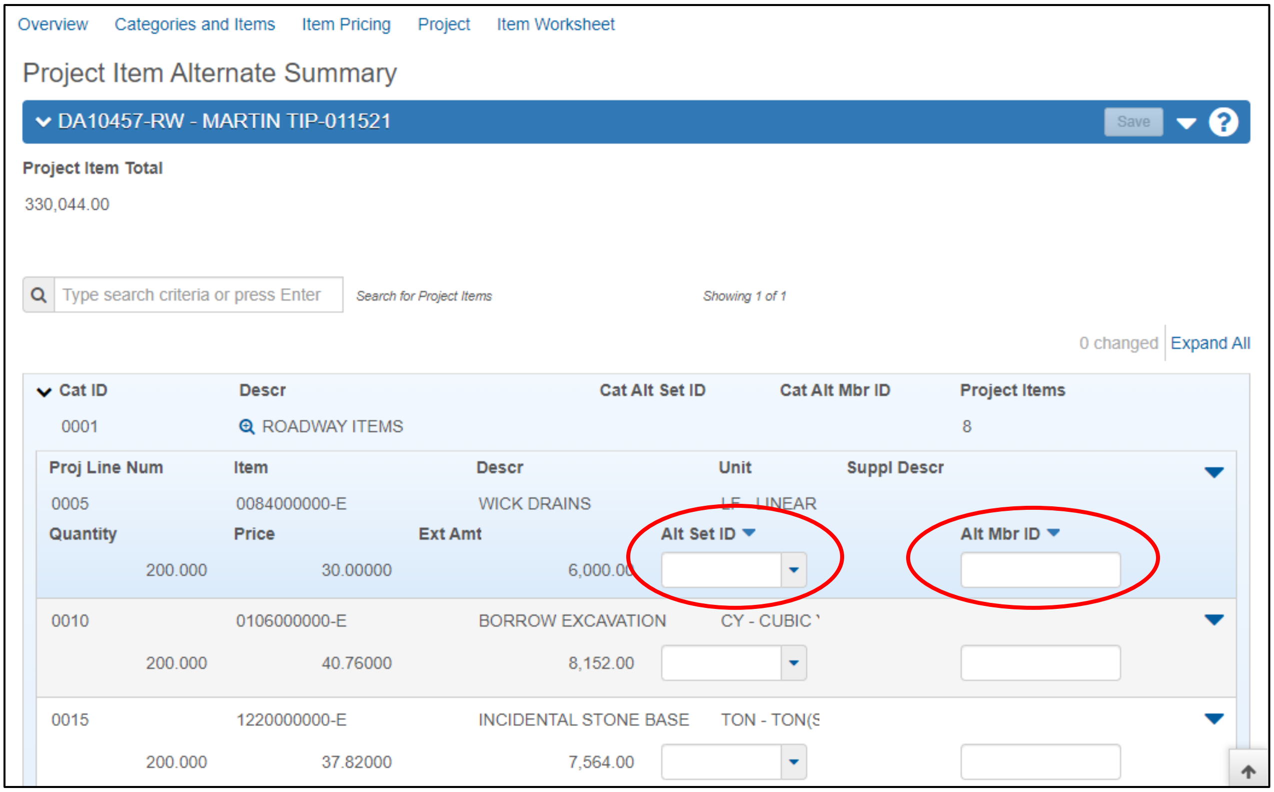


Step	Action	Result
2	Expand the category that contains the **Alternate Items**.	The category will expand to reveal all items.

Continued on Following Page

Alternate Items

(continued)



3	For an alternate item, select the ***2-letter alternative set*** from the drop-down list in the **ALT SET ID** field.	The **Alternate Set** selected will appear in the **ALT SET** field.
4	For an alternate item, type the ***1-digit sequential Alternate Member*** in the **ALT MBR ID** field.	N/A

Repeat these steps for each **Alternate Item**.

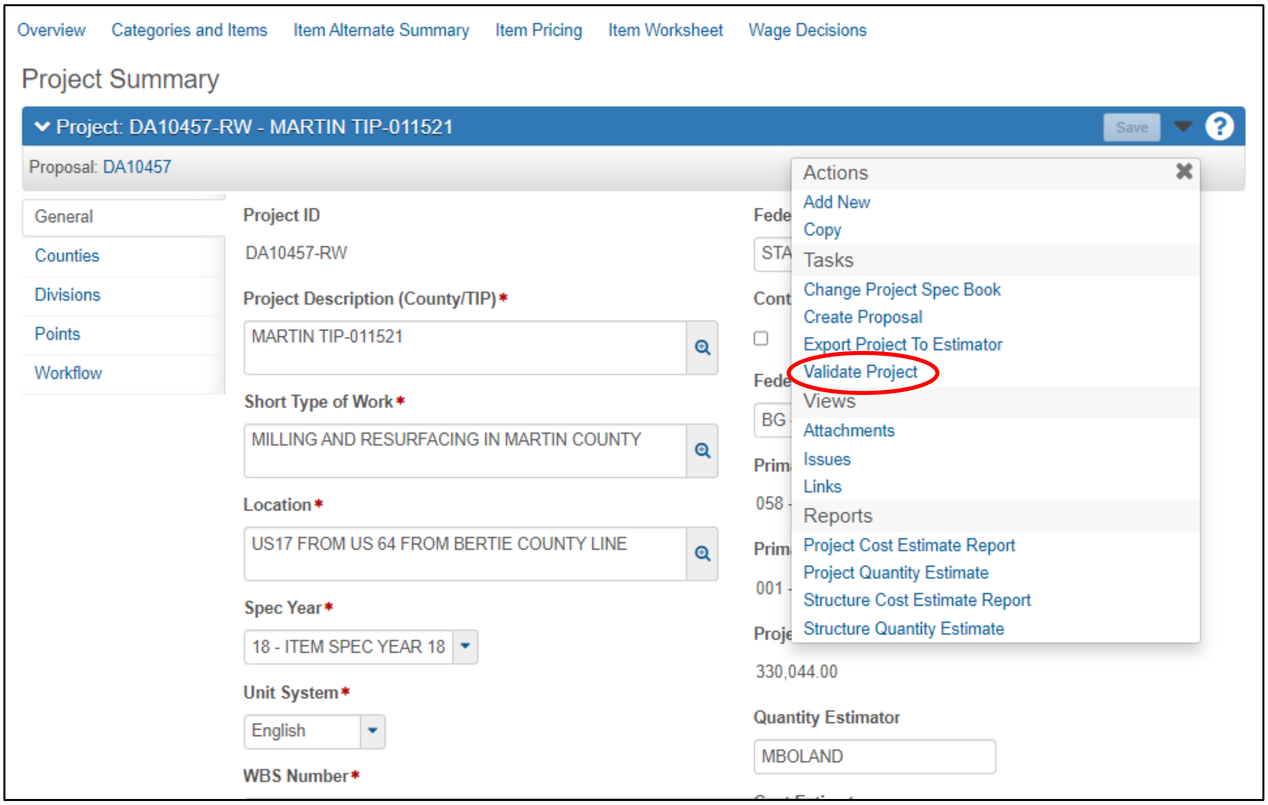
5	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar.**

Helpful Hint

On reports, **Alternate Items** will appear at the **end** of the associated proposal section. (**Roadway**, **Culvert**, **Wall**, or **Structure**)

Validating a Project

From within a project, on the **Project Summary** page:

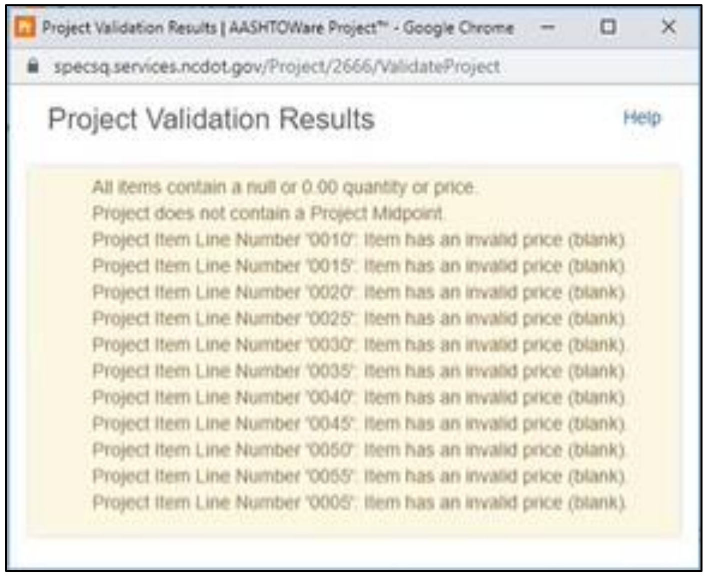


Step	Action	Result
1	From the drop-down arrow at the right side of the **Header Bar** select ***Validate Project***.	The **Project Validation Results** popup will appear.

Continued on Following Page

Validating a Project

(continued)



(*Project Validation Results Popup*)

Project Validation has run, and the project has been checked for errors. Any errors that are found will be displayed in this popup.

The following types of messages can be ignored:

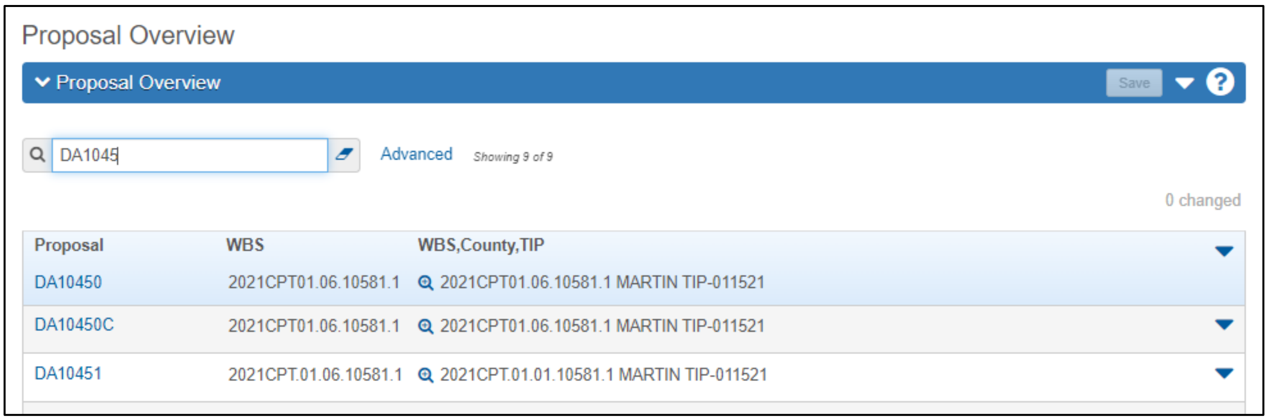
- Project Midpoint
- Invalid Price (blank) – You have only entered quantities.
- Fund Packages – We use WBS numbers.

Chapter 4 Proposal Setup

Finding a Proposal

From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	In the **Preconstruction** section, click **PROPOSALS**.	The **Proposal Overview** page will appear.



2	The search filter requires 3 characters and will continue auto filtering the list as you type.

Criteria	**Result**
Proposal Number	The proposal. (This is the actual contract number.)
Partial Proposal Number	A list of proposals that contain the criteria
WBS Number	The proposal(s) associated with the WBS Number
Partial WBS Number	List of proposals that associated with a WBS that contains the criteria
TIP Number	The proposal(s) associated with the TIP Number
Partial TIP Number	List of proposals that are associated with a TIP that contains the criteria
County / Partial County	List of proposals associated with the county

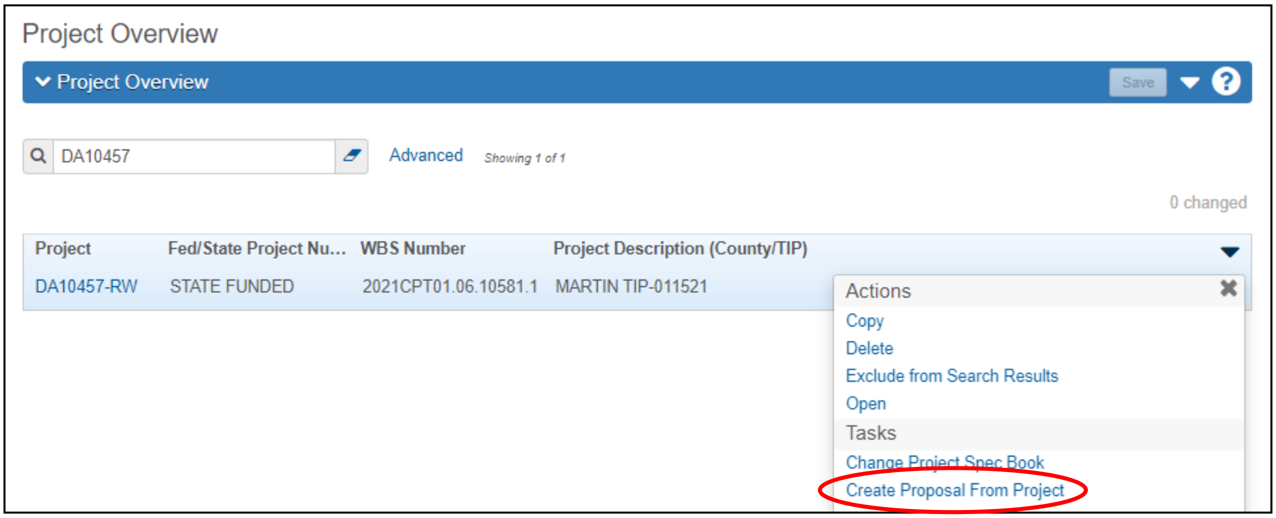
3	Click on the **PROPOSAL NUMBER** you wish to open.	The proposal will open.

Creating a Proposal From a Project

IMPORTANT We only recommend doing this process only if you have one WBS number.

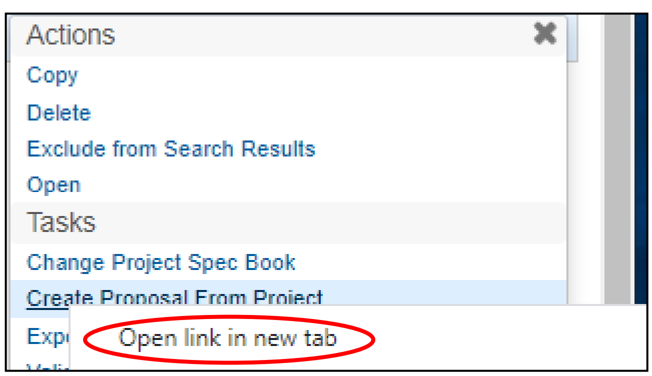
Follow the procedure for **Finding a Project** on **Page 2-15**.

From the ***Project Overview*** page:



Step	Action	Result
1	From the drop-down arrow at the right side of the **project you are creating the proposal from** select **CREATE PROPOSAL FROM PROJECT**.	The **Create Proposal From Project** page will appear.

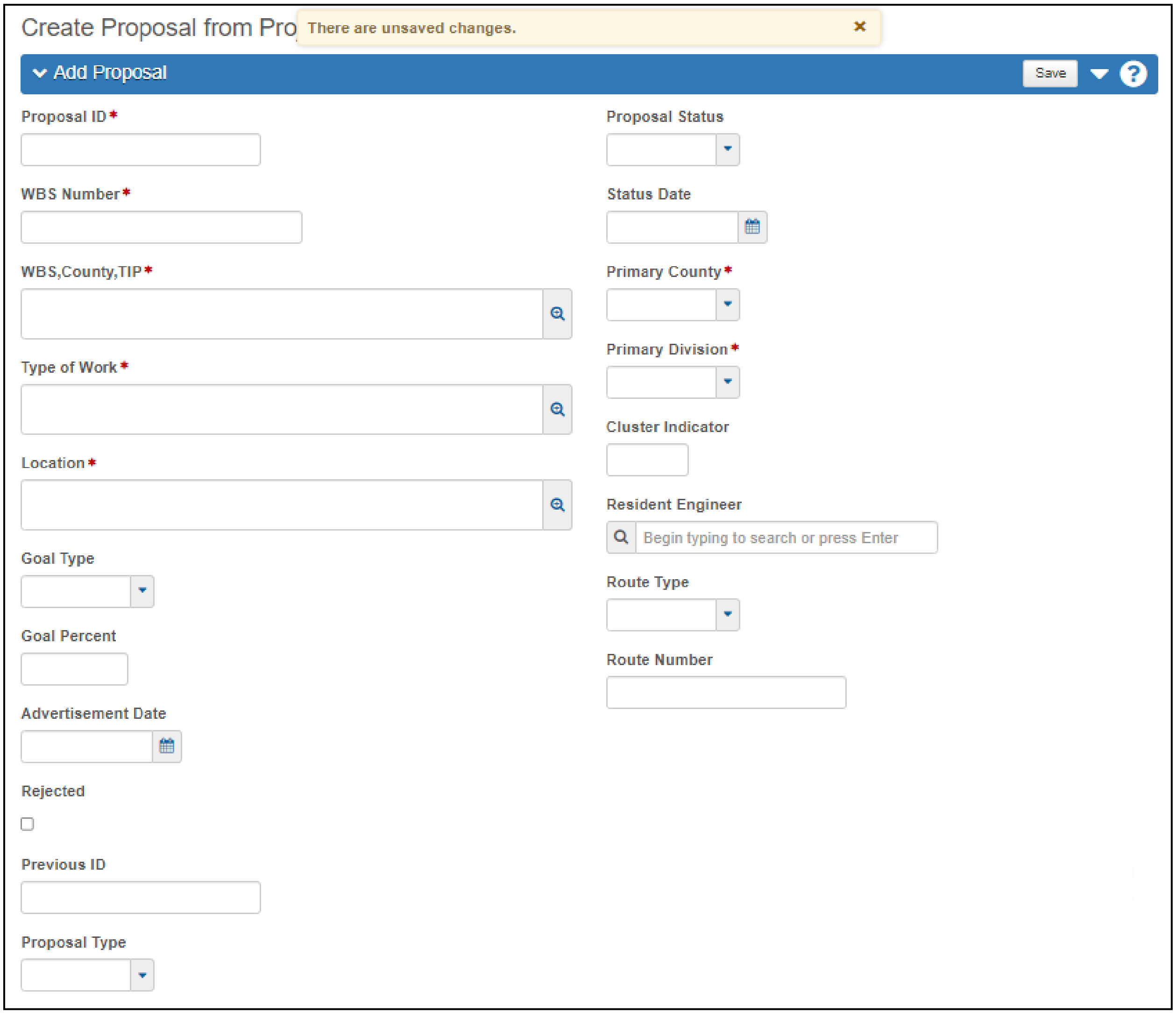
Helpful Hint Instead of selecting **CREATE PROPOSAL FROM PROJECT**, right-click on it and select **OPEN LINK IN NEW TAB**. This way, you will be able to copy and paste information from one tab to the other.



Continued on Following Page

Creating a Proposal From a Project

(continued)



(*Create Proposal From Project Page*)

2	The number of the project you have just copied will appear in the **PROPOSAL ID** field. Overwrite all or part of this number with ***the number of the proposal you are creating*** from this project.	N/A

🗁**NOTE:** Remember to remove the **-ST** or **-RW** suffix.

Continued on Following Page

Creating a Proposal From a Project

(continued)

On the **General** tab, information from the project will be carried over into the following fields. You will be able to change them.

COUNTY, TIP

PRIMARY COUNTY

PRIMARY DIVISION

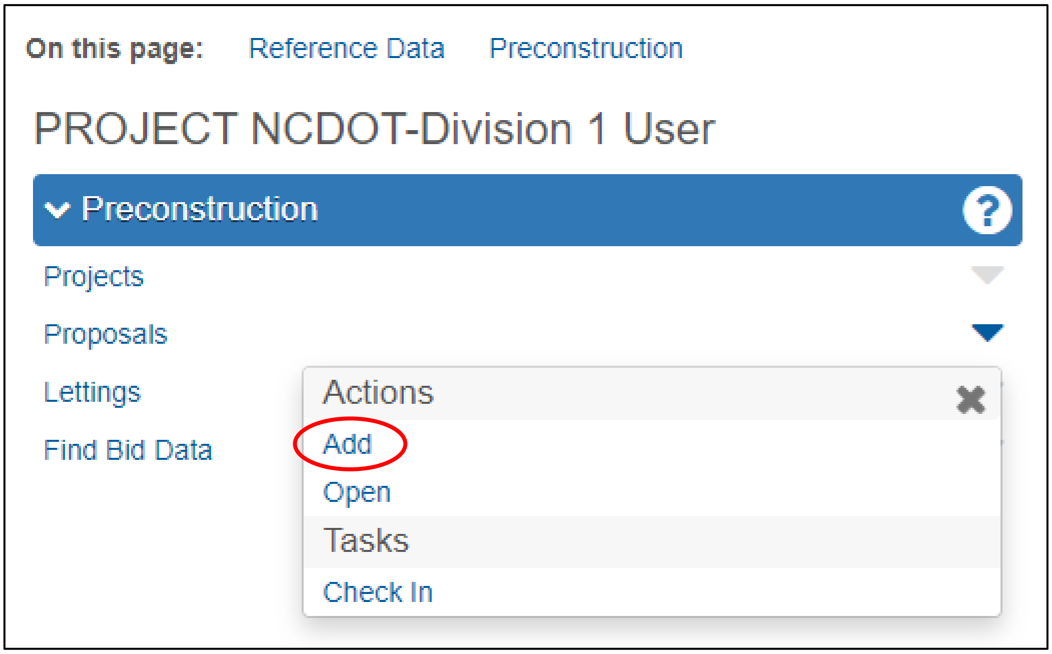
For instructions on completing all fields beginning with the **General** tab, consult the procedure beginning on **Page 4-6**.

3	Click the SAVE button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Adding a Proposal

Once all line items and quantities have been completely entered, you must create a proposal. Once a proposal is built, it will be ready for final check, final cost estimation, and entering of contract times.

From the ***AASHTOWare Project Dashboard:***



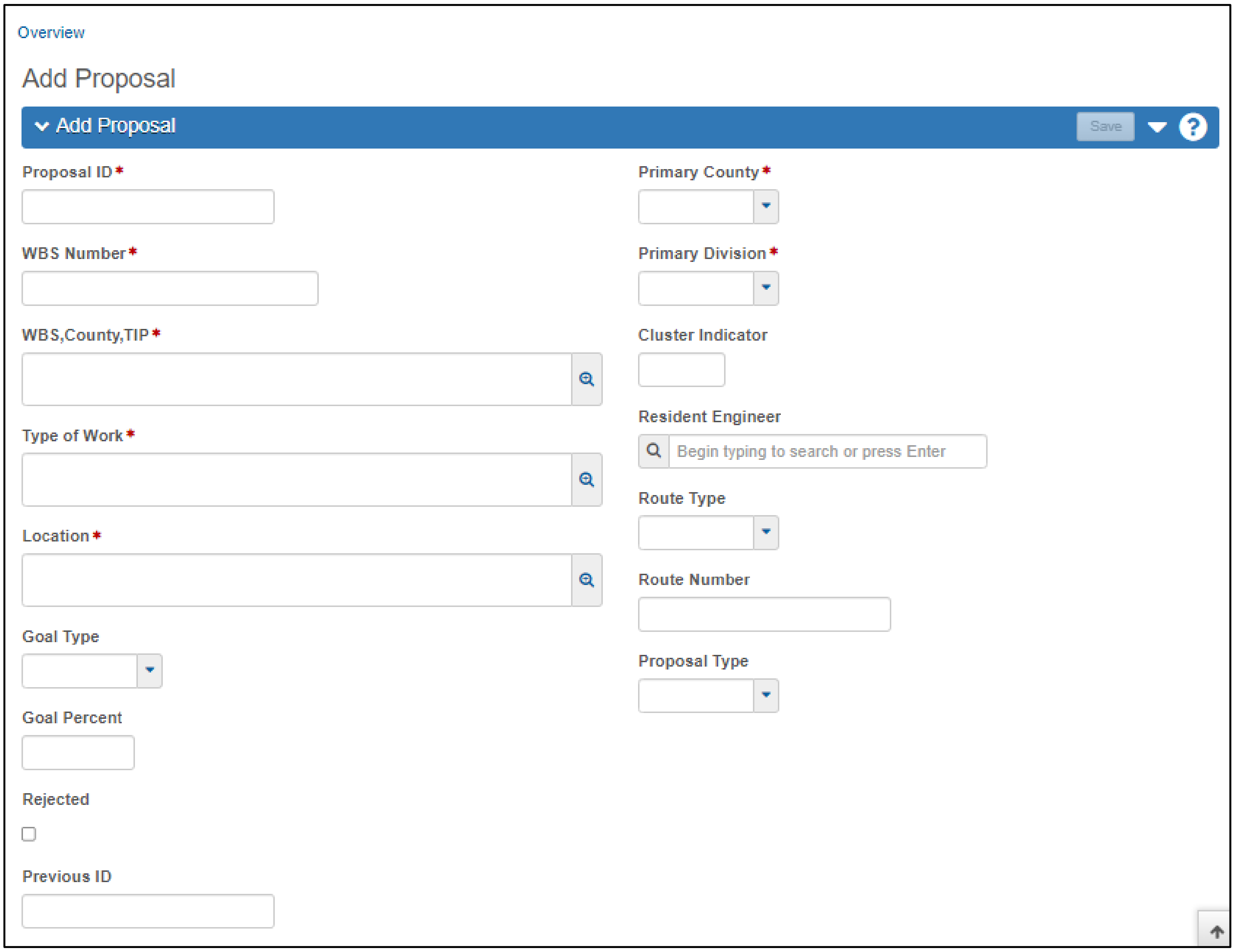
(*Preconstruction Menu*)

Step	Action	Result
1	In the **Preconstruction** section, click the drop-down arrow to the right of **PROPOSALS**. 🗁**NOTE:** You can also perform this step from the **Proposal Overview Page** shown on **Page 4-1**.	A menu will appear.
2	Click **ADD**.	The **Add Proposal** page will appear.

Continued on Following Page

Adding a Proposal

(continued)



(*Add Proposal Page – General Tab*)

General Tab

🗁**NOTE:** Fields marked with a red asterisk (*) are required to save the proposal.

Continued on Following Page

Adding a Proposal

(continued)

3	Turn on **CAPS LOCK** by pressing the CapsLock key. All information entered into the system must be in **ALL CAPS**.	N/A
4	Type ***the proposal number*** in the **PROPOSAL ID** field. **Proposal Numbers** will have the following format: Central Office: C###### Division: D###### **This field will not be able to be changed after you save the proposal.**	N/A
5	Type the ***WBS number*** in the **WBS NUMBER** field.	N/A
6	Type ***the WBS number, County Name, and TIP number*** in the **WBS,COUNTY.TIP** field.	N/A
7	Type ***the type of work*** in the **TYPE OF WORK** field.	N/A

Helpful Hint

Example: GRADING, DRAINAGE, PAVING & CULVERT

8	Type ***the location*** in the **LOCATION** field.	N/A

Helpful Hint

NOTE: This is **TO/FROM** type of description.
Example: I-40 FROM US-70 TO I-440

The **LOCATION** field can accommodate 120 characters.

9	Select ***DBE*** or ***None*** from the drop-down list in the **GOAL TYPE** field. **NOTE:** If no goals have been set, select *None*.	N/A
10	If applicable, type the ***goal percentage*** in the **GOAL PERCENT** field.	N/A

Continued on Following Page

Adding a Proposal

(continued)

11	Leave the **REJECTED** check box unchecked.	N/A
12	If applicable, type the ***previous contract number*** in the **PREVIOUS ID** field.	N/A
13	Select the ***primary county*** from the drop-down list in the **PRIMARY COUNTY** field.	N/A
14	Select the ***primary division*** from the drop-down list in the **PRIMARY DIVISION** field.	N/A

Cluster Indicator

Whenever proposals are clustered for bidding, the projects involved will be copied and the additional suffix “C” appended to the project number (e.g., D00001-RWC).

The cluster indicator is four characters long. The first two characters will identify the cluster group. The last two characters identify the entire cluster sequence (00) or indicate the individual proposals sequentially (beginning with 01).

Cluster Indicator for entire cluster sequence:

XX00

Cluster Indicator for individual proposal within cluster:

XX01

🗁**NOTE:** Once a clustered proposal has been created, any changes to the information in individual projects will also have to be made in the corresponding projects that make up the clustered proposal.

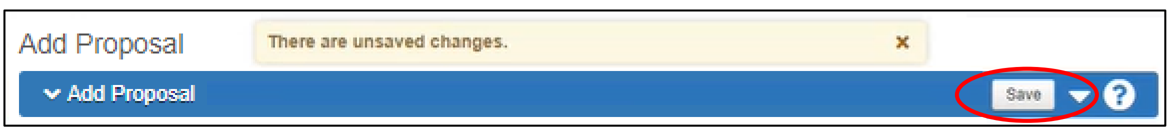
15	If the proposal is part of a cluster, type ***the cluster indicator*** in the **CLUSTER INDICATOR** field.	N/A

Continued on Following Page

Adding a Proposal

(continued)

16	To assign a **Resident Engineer** to this proposal, start typing the name of the ***Resident Engineer*** in the **RESIDENT ENGINEER** field. When the name of the **Resident Engineer** appears, select it from the list.	N/A
17	Select the ***route type*** from the drop-down list in the **ROUTE TYPE** field. 🗁**NOTE:** If you select a **Route Type**, a **Route Number** is required.	N/A
18	Type the ***route number*** in the **ROUTE NUMBER** field. 🗁**NOTE:** If you have entered a **Route Number**, a **Route Type** is required.	N/A
19	Select the ***type of proposal*** from the drop-down list in the **PROPOSAL TYPE** field.	N/A



20	Click the **SAVE** button in the **Header Bar**.	The proposal will be saved. The **Proposal Number and Description** will now appear in the **Header Bar**.

Continued on Following Page

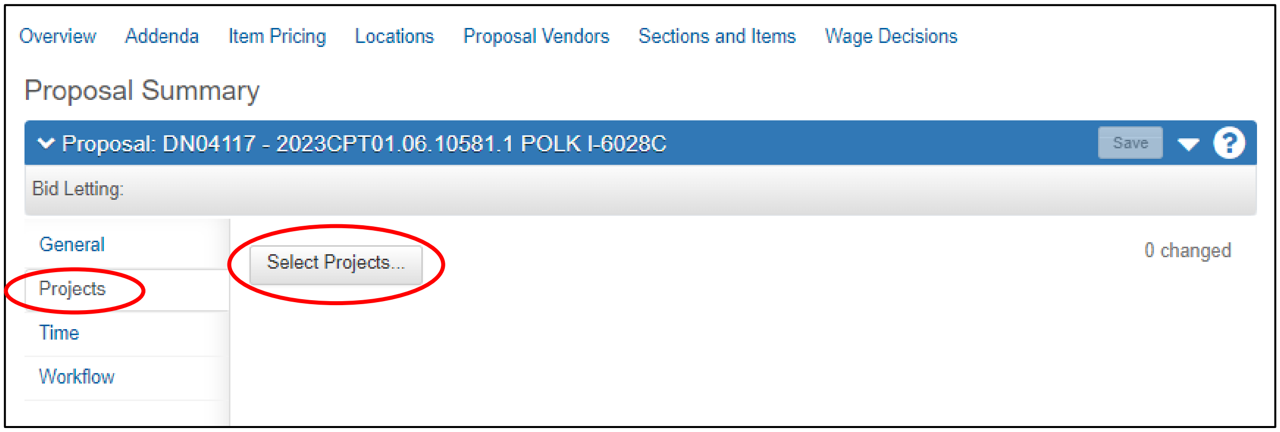
Adding a Proposal

(continued)

Projects Tab

21	On the left side of the page, click on the **Projects** tab.	The **Projects** tab will appear.

This tab is where projects are linked to the proposal.



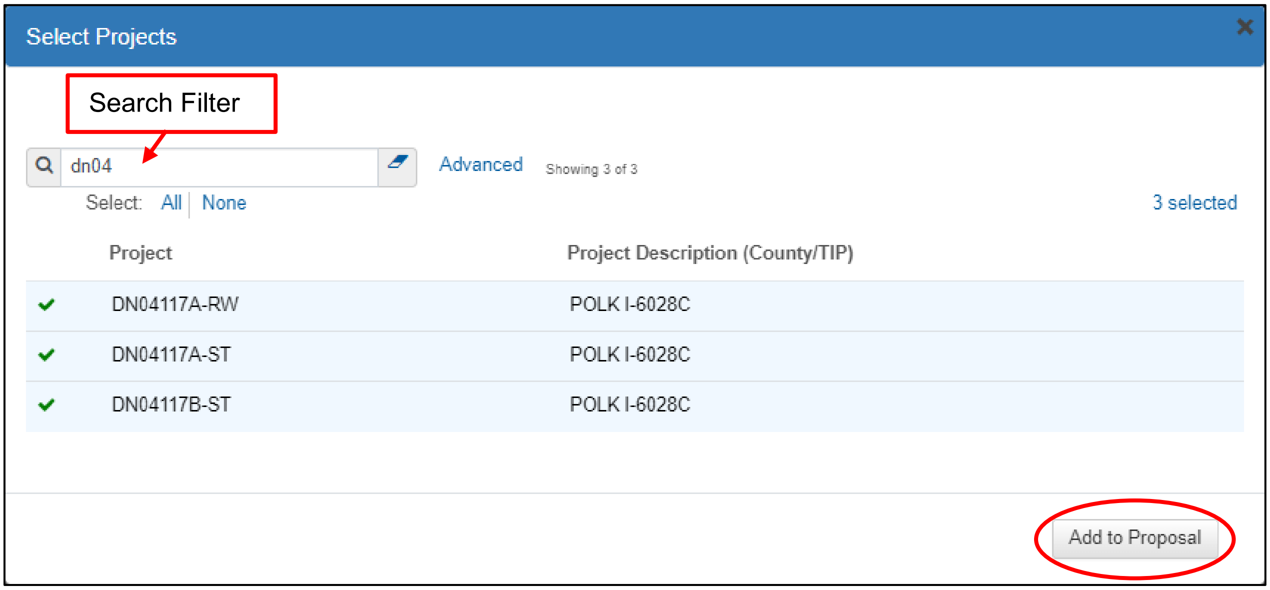
(*Proposal Summary Page – Projects Tab*)

22	Click the **SELECT PROJECTS** button.	A **Search** dialog will appear.

Continued on Following Page

Adding a Proposal

(continued)



23	Type the ***criteria used to find the project*** in the **SEARCH FILTER**. The **SEARCH FILTER** requires 3 characters and will continue auto filtering the list as you type.

Criteria	**Result**
Project Number	The project
Partial Project Number	A list of projects that contain the criteria
TIP Number	The project(s) associated with the TIP Number
Partial TIP Number	List of projects that associated with a TIP that contains the criteria
County / Partial County	List of projects associated with the county

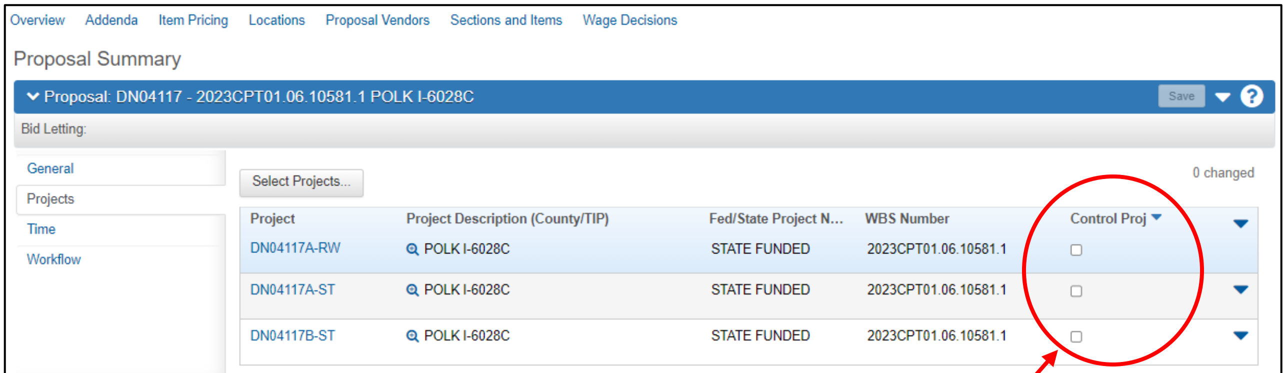
24	Click on ***the Project(s)*** you wish to add.	A check mark will appear to the left of the selected project(s).

Continued on Following Page

Adding a Proposal

(continued)

25	Click the **ADD TO PROPOSAL** button.	The selected project(s) will appear on the **Projects** tab.



🗁**NOTE:** **DO NOT** check the **CONTROL PROJ** check box.

26	Click the **SAVE** button in the **Header Bar**.	A **Save Complete** message will appear above the **Header Bar**.

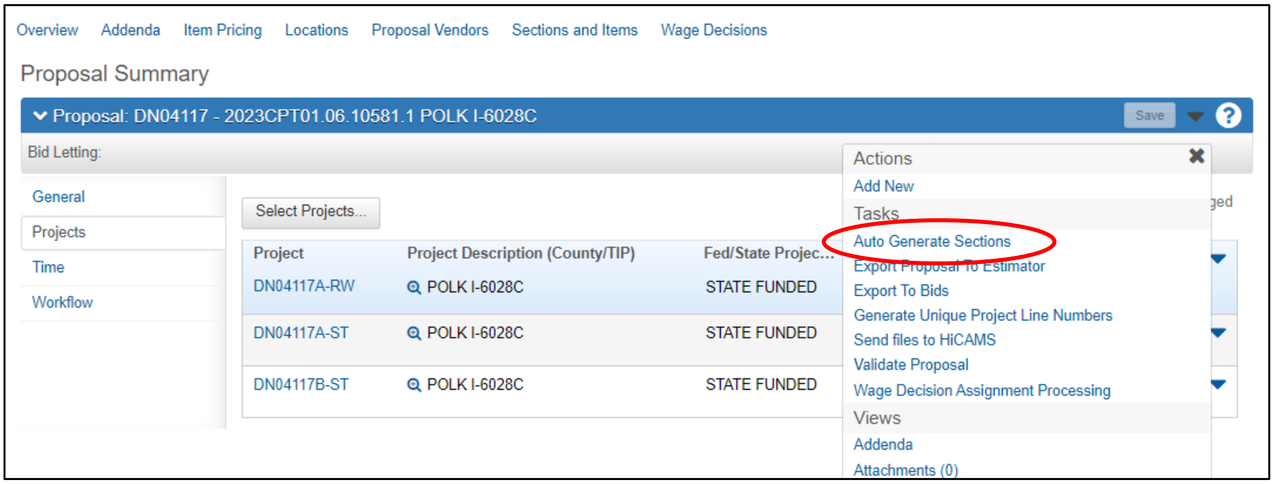
Repeat **Steps 22-26** if you need to add additional projects to the proposal.

If you have added a project to the proposal by mistake, see **Removing a Project from a Proposal** on **Page 4-30**.

Continued on Following Page

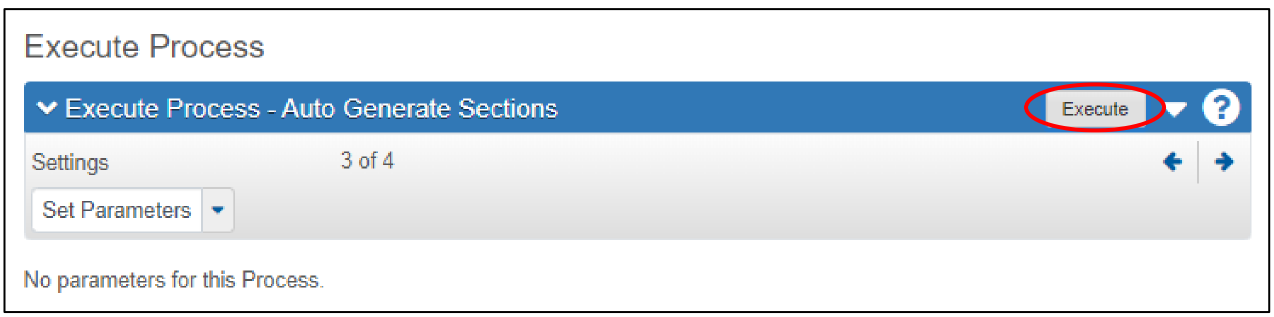
Adding a Proposal

(continued)



Generating Sections & Assigning Items

27	From the drop-down arrow at the right side of the **Header Bar** select **AUTO GENERATE SECTIONS**	The **Execute Process** window will appear.



28	Click the **EXECUTE** button.	The process status will appear in a new tab.

```
12/15/2023 2:14:47 PM: Info - Starting Proposal Sections Update...
12/15/2023 2:15:13 PM: Info - Start - Processing Proposal ID: DN04117
12/15/2023 2:15:13 PM: Info - Start - Processing Proposal Section: 0001
12/15/2023 2:15:13 PM: Info - Start - Processing Proposal Section: 0003
12/15/2023 2:15:13 PM: Info - Start - Processing Proposal Section: 0004
12/15/2023 2:15:13 PM: Info - Start - Processing Proposal Section: 0002
12/15/2023 2:15:14 PM: Info - Proposal Sections Update Completed.
12/15/2023 2:15:14 PM: Info - Attaching to Process History. To this logged User DOT\apjohnson2
12/15/2023 2:15:16 PM: Info - There were no errors.
12/15/2023 2:15:16 PM: Info - End log for PropsalSectionUpdateProcessing
```

Continued on Following Page

Adding a Proposal

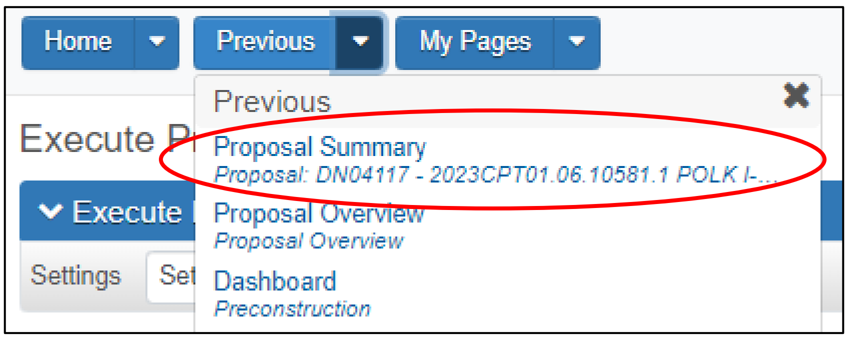
(continued)

The main things to look for in this window are the sections, and that there were no errors.

This process will also appear in the **Process History** list.

You will not need it and will not need to refer to it later, so if you wish to delete it, see **Deleting a Process** on **Page 13-1**.

29	When you are finished with this window, close the tab, and return to the proposal. 🗁**NOTE:** When you close the tab, you will be on the **Execute Process** page, so you will need to select the Proposal Summary from the Previous drop-down.



30	From the **Proposal Summary** page, click on **SECTIONS AND ITEMS** at the top of the window.	The **Proposal Sections and Items window** will appear.

The section descriptions will appear based on how you entered them in the project categories.

The ID numbers will auto-generate sequentially. These are:

0001 Roadway Items

0002 Culvert Items

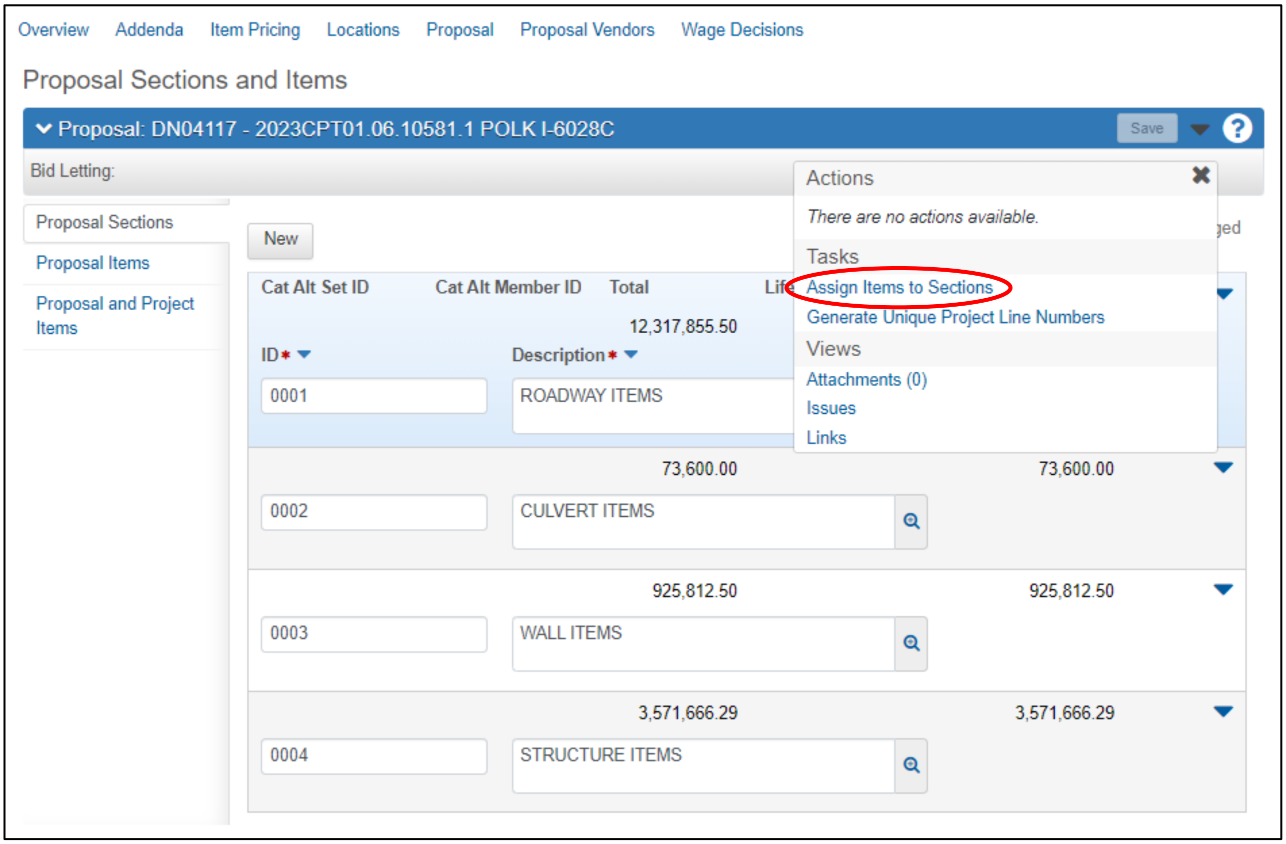
0003 Wall Items

0004 Structure Items

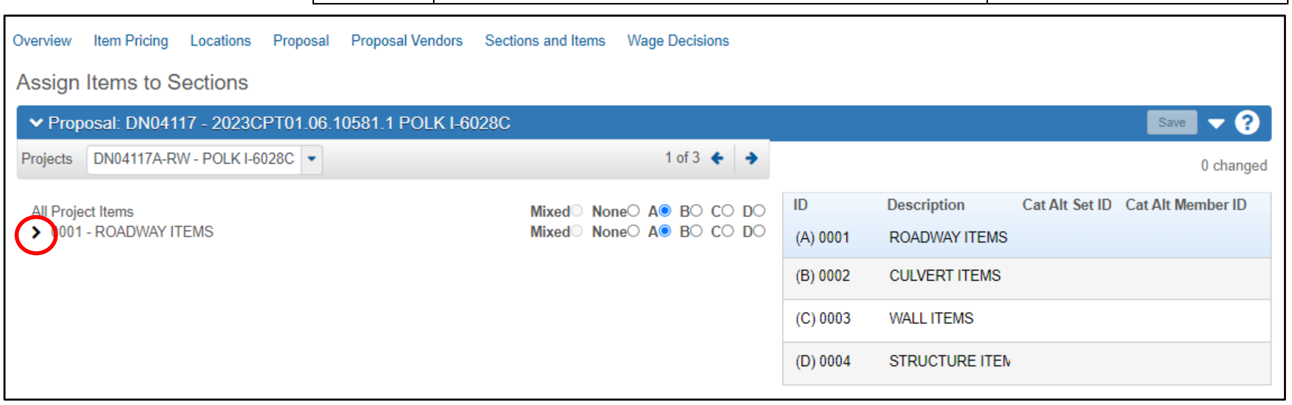
Continued on Following Page

Adding a Proposal

(continued)



31	From the drop-down arrow at the right side of the **Header Bar** select **ASSIGN ITEMS TO SECTIONS**.	The **Assign Items to Sections** page will appear.



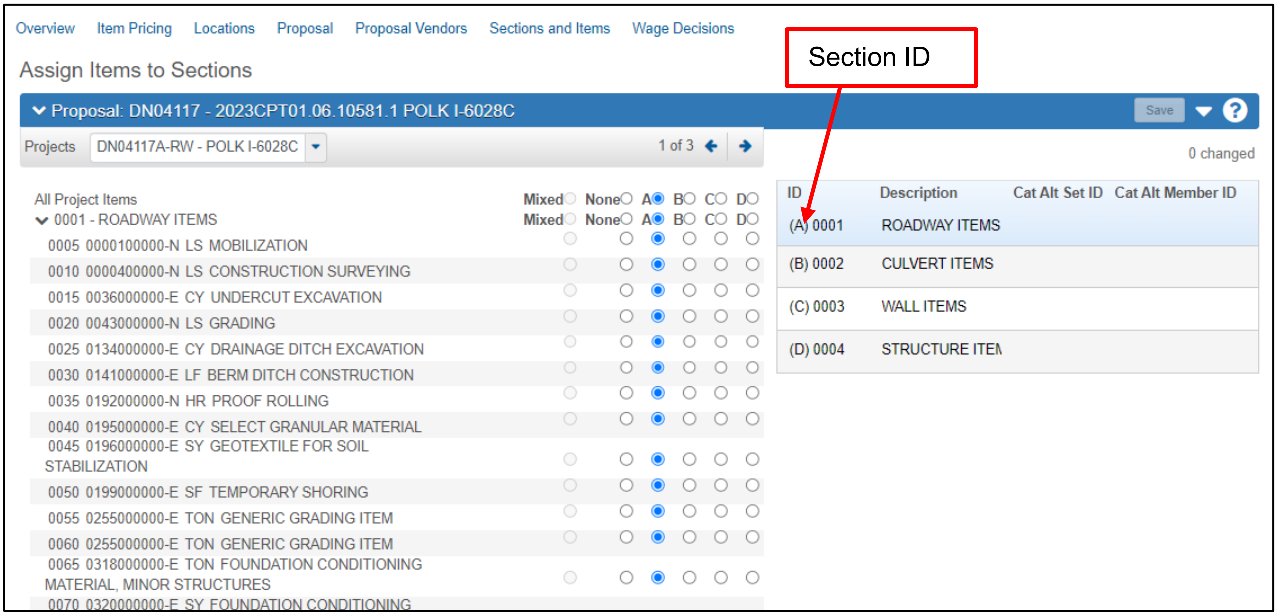
Click the arrow to the left of each section to expand the list of items within it.

Continued on Following Page

Adding a Proposal

(continued)

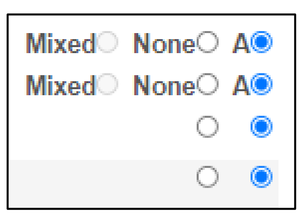
🗁**NOTE:** There may only be one section.



On the right side of the window is a list of sections and their corresponding letter ID.

On the left side of the window is the list of items.
There are 3 columns of radio buttons:

- **Mixed**: This indicates that the items are in multiple sections
- **None**: The item isn't assigned to a section
- **Section ID**: The item is assigned to the section

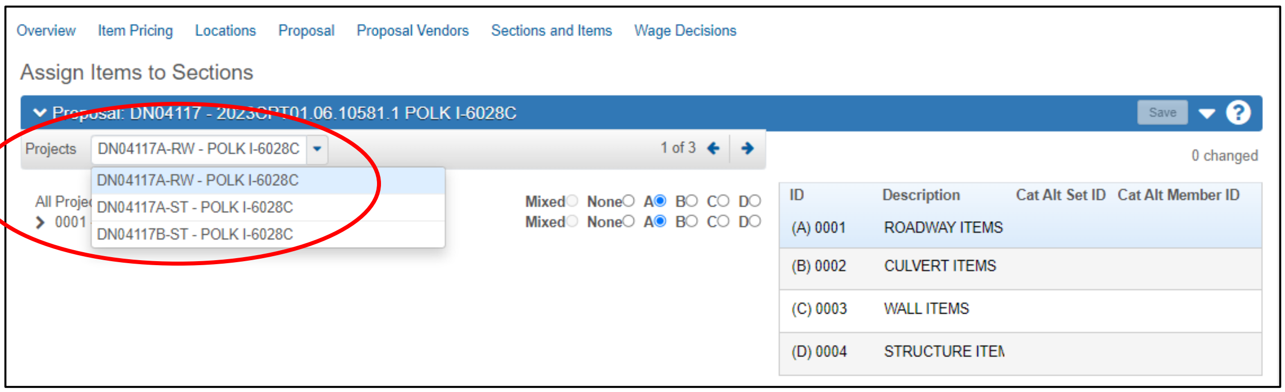


Continued on Following Page

Adding a Proposal

(continued)

32	Make sure every item is assigned to a section by clicking the appropriate **SECTION ID** radio button to the right of each item. 🗁**NOTE:** Make sure no items have the **NONE** radio button selected.	N/A
33	Once you have completed all changes, click the **SAVE** button in the **Header Bar**.	A **Save Complete** message will appear above the **Header Bar**.



34	If there is more than one project, you will be able to switch between projects by selecting each project from the drop-down list under the **Header Bar**. Repeat **Steps 33-35** for each project.	N/A

If items are added to a project that has been linked to a proposal, you can check them here to make sure they have been assigned to the correct section.

Continued on Following Page

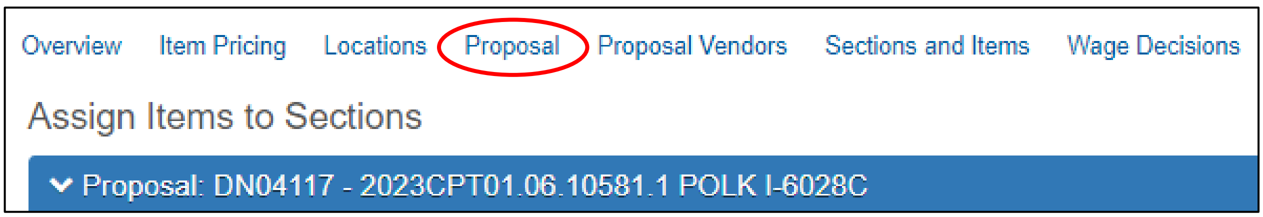
Adding a Proposal

(continued)

🕮 Helpful Hint

Once this section is complete, it is helpful to go to **Pricing Items** on **Page 4-31** to check for the following:

- Make sure no items are listed outside of a section.
- Check all **LS** items to make sure they rolled up together, so quantity equals 1.00.
- Check all generic and skeleton (fill in the blank) items to make sure they combined properly. (If not, correct the supplemental descriptions to match exactly.)



Contract Times

35	Click the **PROPOSAL** Quick Link at the top of the window.	The **Proposal Summary** window will appear.
36	On the left side of the page, click on the **Time** tab.	The **Time** tab will appear.

🕮 Helpful Hint

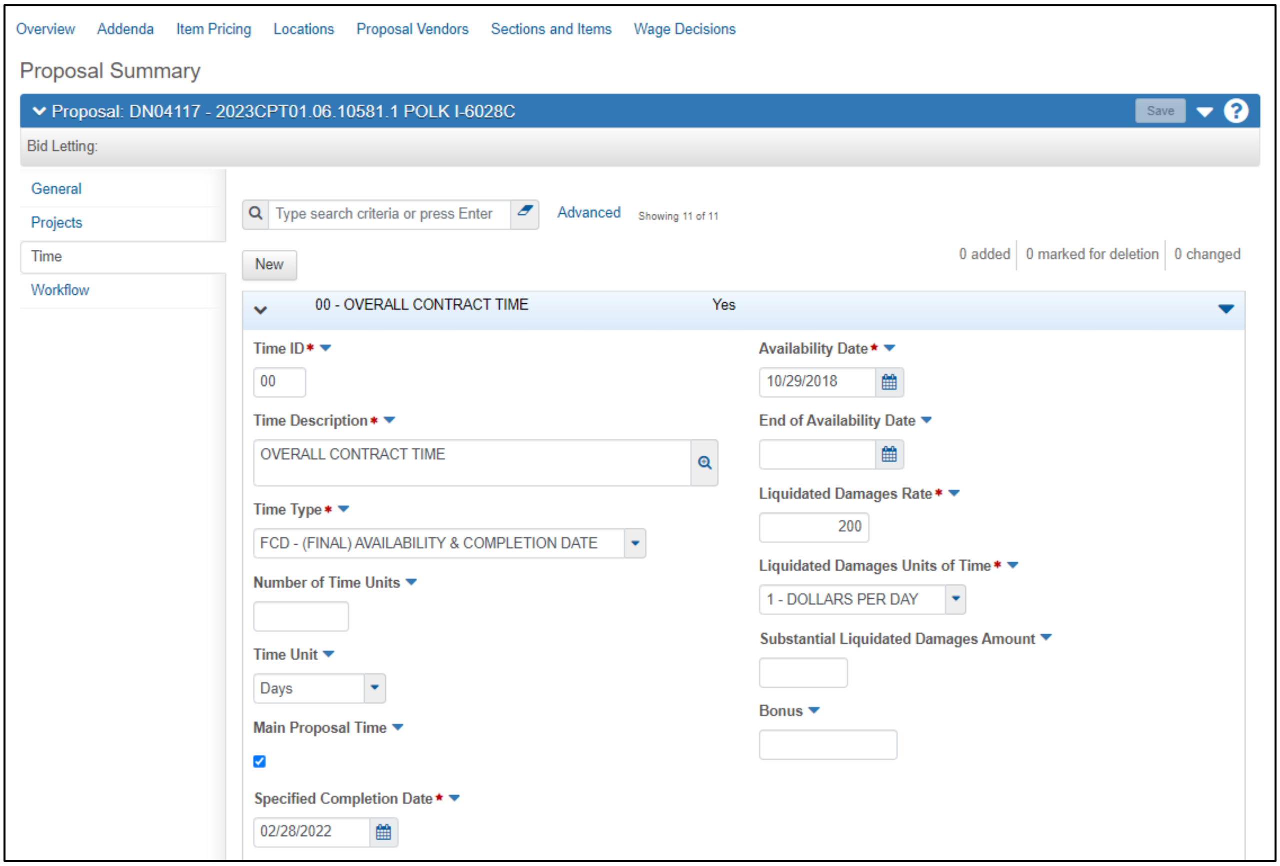
Refer to **Appendix A - Contract Times** on **Page A-1** for a list of contract times.

37	Click the **NEW** button.	A set of fields will appear.

Continued on Following Page

Adding a Proposal

(continued)



(*Add Proposal Page – Time Tab*)

38	Type ***a Time ID*** in the **TIME ID** field. (This field is equivalent to the site number field used previously.) 🗁**NOTE:** The first **Time ID** will be **00** for **Overall Contract Time**. Intermediate items are sequential (01, 02, etc.)	N/A

🕮 **Helpful Hint**

The **Time IDs** should be in the same order as listed in the actual proposal and the numbers should match.

Continued on Following Page

Adding a Proposal

(continued)

39	Start typing ***the description of the contract time*** in the **TIME DESCRIPTION** field. 🗁**NOTE:** There are codes for final and intermediate contract times. Choose the appropriate code for your situation.	As you type, items that closely match your selection will appear.

- If the **TIME ID** is **00**, the description will be **Overall Contract Time**.
- Intermediate items are sequential. (01, 02, etc.)
  (These should be in the same order as listed in the actual proposal and numbers should match.)
- **Time and Lane Restrictions** should always be last.

40	Select ***the contract time type*** from the drop-down list in the **TIME TYPE** field.	N/A
41	Type the **maximum site time** in the **NUMBER OF TIME UNITS** field.	N/A
42	Select ***Days*** or ***Hours*** from the drop-down list in the **TIME UNIT** field.	N/A
43	Check the **MAIN PROPOSAL TIME** check box if this is the main contract time.	N/A

🗁**NOTE:** The next fields are date fields. If you click the **CALENDAR** button, a popup calendar will allow you to select the date so that it appears in the field.

44	Type ***the completion date*** in the **SPECIFIED COMPLETION DATE** field.	N/A
45	Type ***the availability date*** in the **AVAILABILITY DATE** field.	N/A

Continued on Following Page

Adding a Proposal

(continued)

46	If the availability date is a range, type the ***ending availability date for the contract*** in the **END OF AVAILABILITY DATE** field.	N/A
47	Type ***the liquidated damages rate*** in the **LIQUIDATED DAMAGES RATE** field.	N/A
48	Select ***the unit of time*** from the drop-down list in the **LIQUIDATED DAMAGES UNITS OF TIME** field.	N/A
49	Type the ***liquidated damages amount*** in the **SUBSTANTIAL LIQUIDATED DAMAGES AMOUNT** field.	N/A
50	If applicable, type the **amount of the bonus** in the **BONUS** field.	N/A

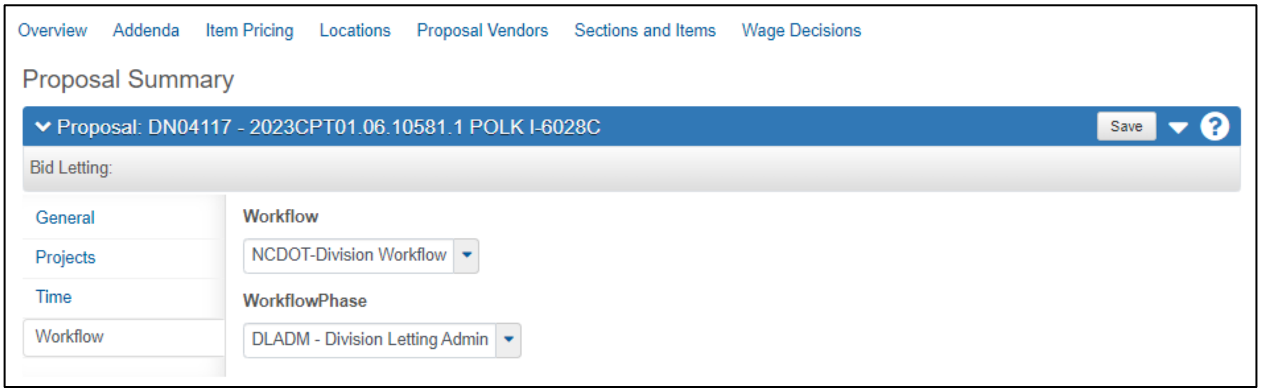
Repeat steps **37-50** for each contract time.

51	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.
52	On the left side of the page, click on the **Workflow** tab.	The **Workflow** tab will appear.

Continued on Following Page

Adding a Proposal

(continued)



(*Add Proposal Page – Workflow Tab*)

Workflow Tab

53	Select ***NCDOT – Division Workflow*** from the drop-down list in the **WORKFLOW** field.	Your selection will appear in the **WORKFLOW** field.
54	Select ***DLAM*** from the drop-down list in the **WORKFLOW PHASE** field.	Your selection will appear in the **WORKFLOW PHASE** field.
55	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

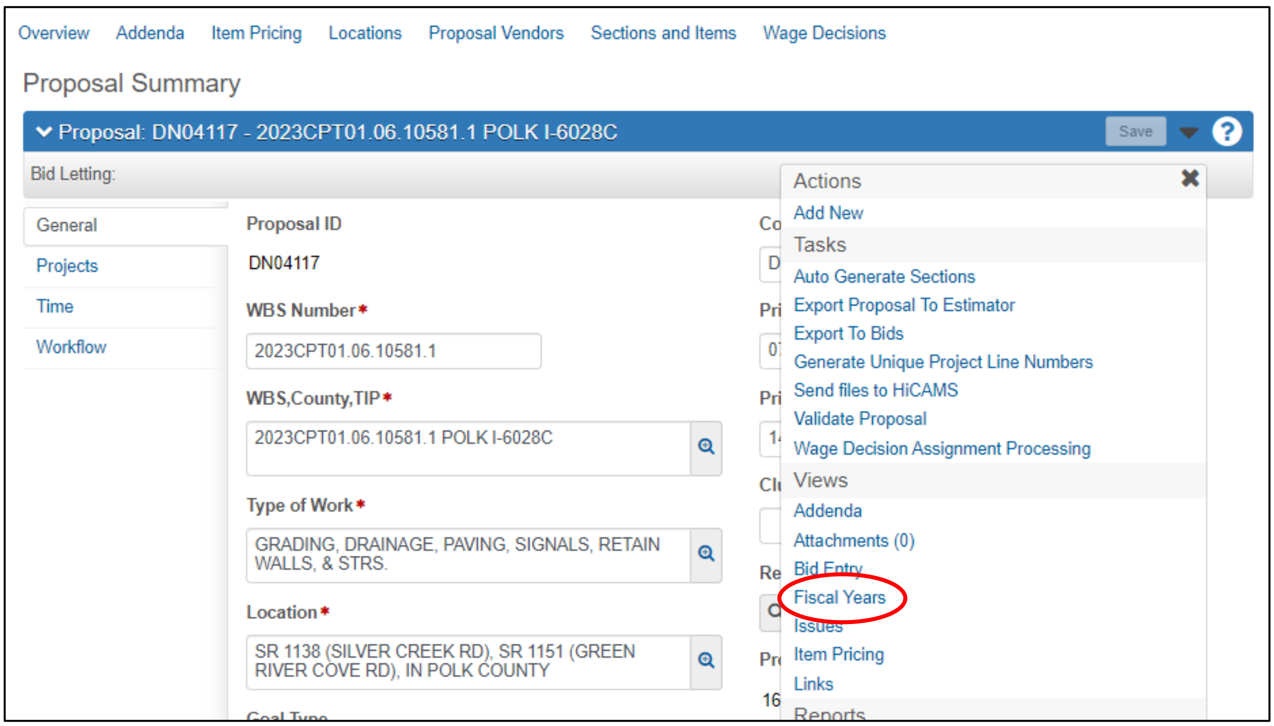
Continued on Following Page

Adding a Proposal

(continued)

Fiscal Years

56	Click the **General** tab, to return to the **Proposal Summary – General** tab.	The **GENERAL** tab will appear.
57	Click the **RELOAD** button ↻ on your browser. 🗀**NOTE:** This button is located in the header bar of your web browser.	N/A
58	On the **Proposal Summary** page, from the **Header Bar**, click the drop-down arrow.	A menu will appear.

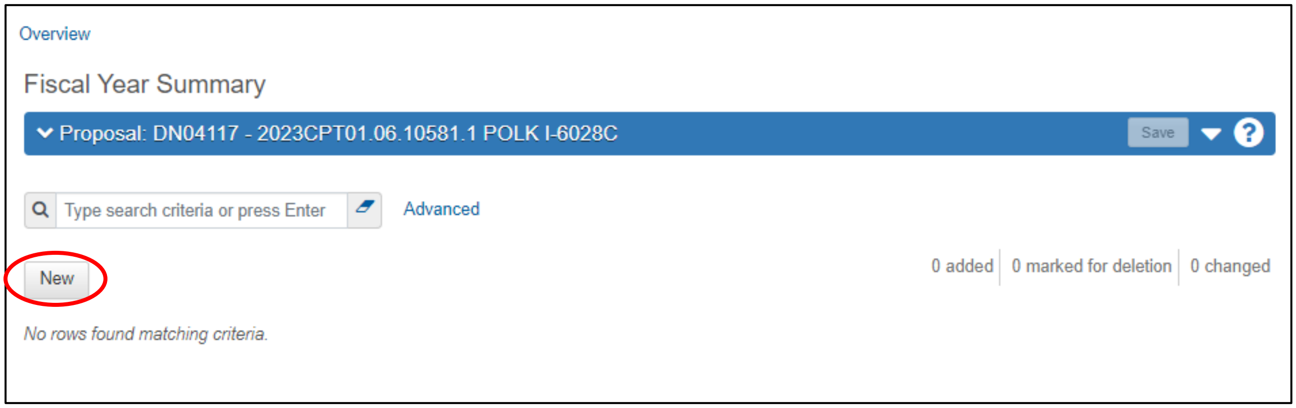


59	Select **FISCAL YEARS** from the menu.	The **Fiscal Year Summary** page will appear.

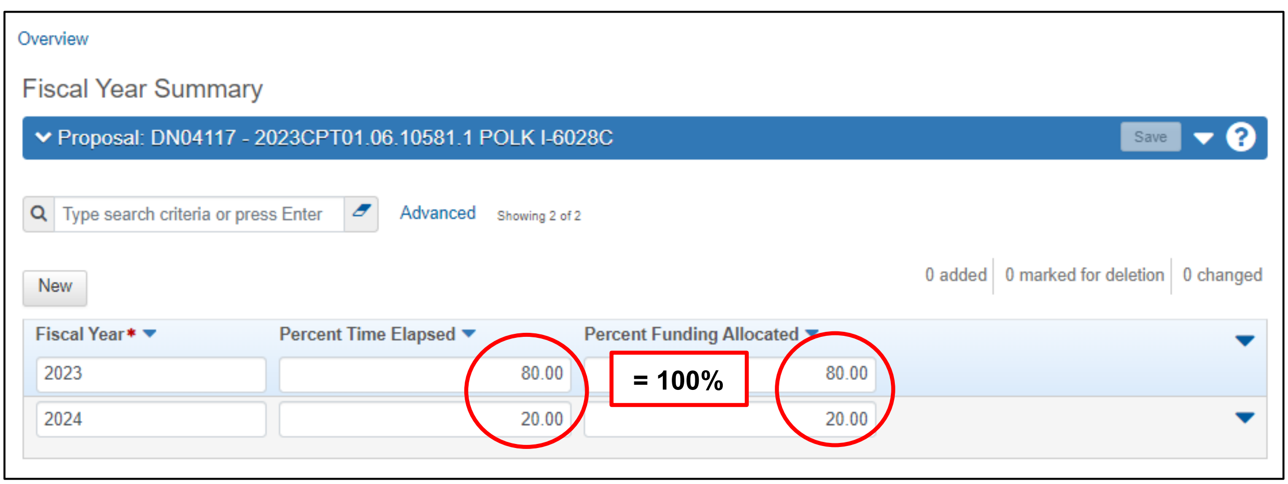
Continued on Following Page

Adding a Proposal

(continued)



60	Click the **New** button.	A new row of fields will appear.
61	Type ***the current fiscal year*** in the **Fiscal Year** field.	N/A
62	If applicable, type ***the percentage of time elapsed in the current fiscal year*** in the **Percent Time Elapsed** field.	N/A
63	Type ***the percentage of funding allocated to this fiscal year*** in the **Percent Funding Allocated** field.	N/A



Continued on Following Page

Adding a Proposal

(continued)

Make sure the sum of the percentages in both **PERCENT TIME ELAPSED** and **PERCENT FUNDING ALLOCATED** fields equal 100% each.

64	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Repeat steps **61 – 65** for each fiscal year.

Copying A Proposal

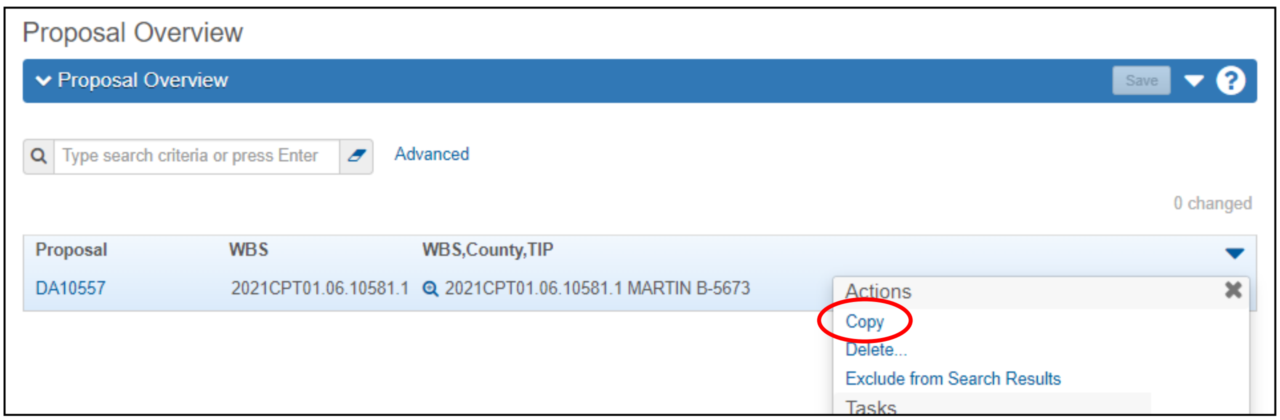
Use this procedure only when re-letting a proposal.

You will need to remember to add the copied proposal number in the **PREVIOUS ID** field on the **General tab** of the new Proposal.

Follow the procedure for **Finding a Proposal** on **Page 4-1**.

From the ***Proposal Overview*** page:

Step	Action	Result
1	Click the drop-down arrow on the right side of the project.	A drop-down menu will appear.

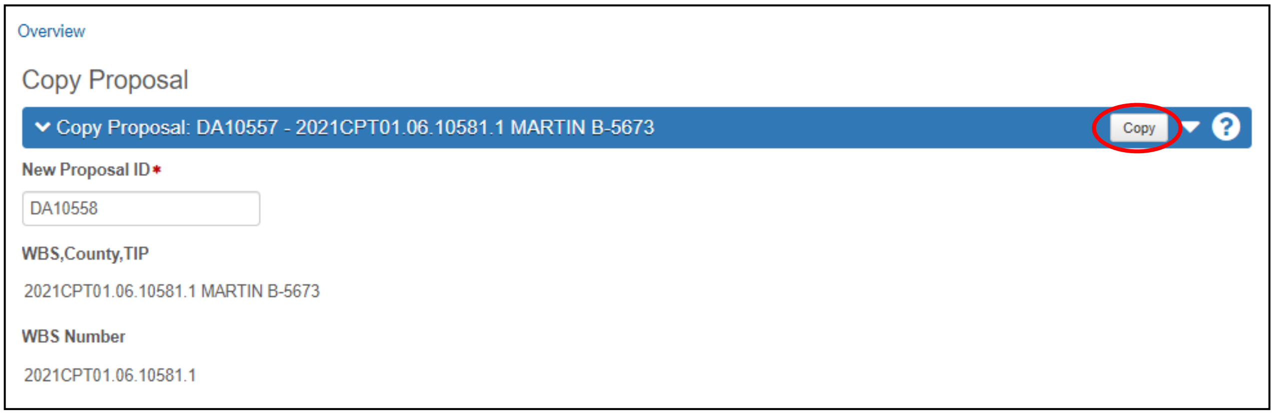


2	Select ***Copy*** from the menu.	The **Copy Proposal** page will appear.

Continued on Following Page

Copying a Proposal

(continued)

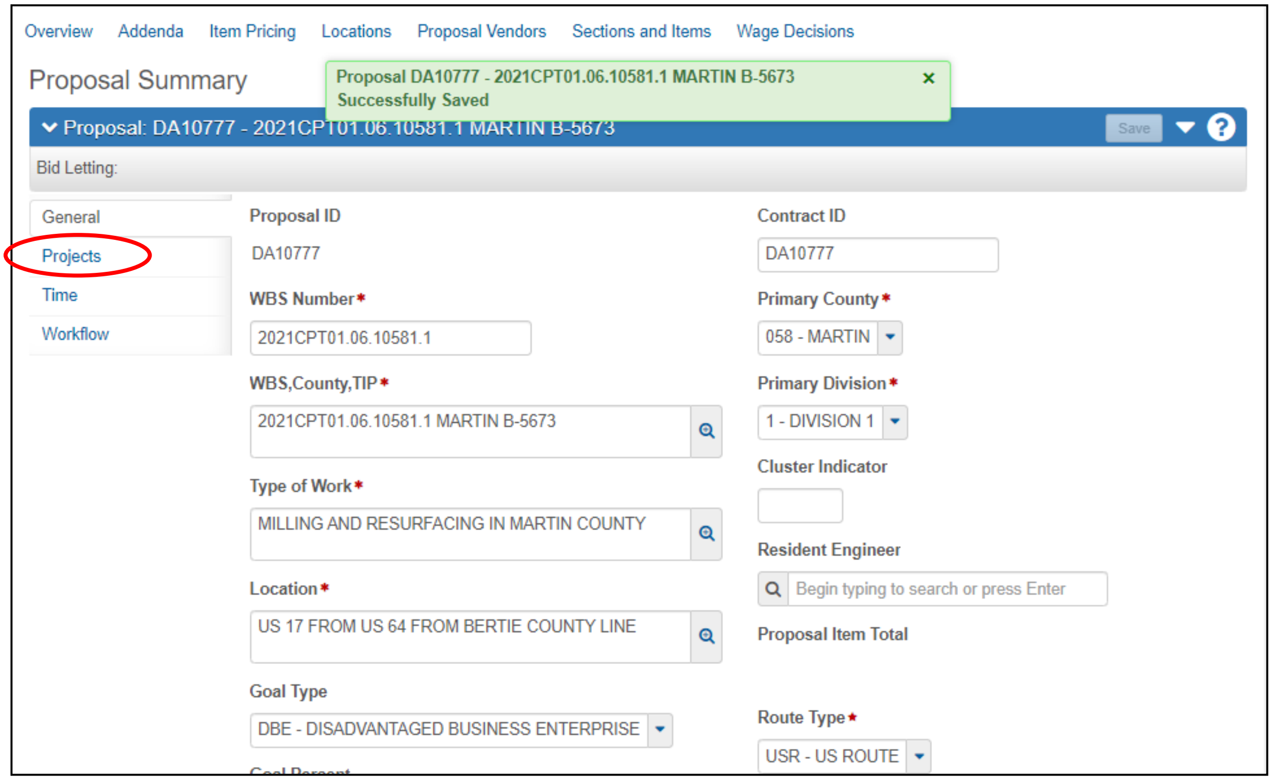


3	Overwrite ***the Proposal Number*** in the **PROPOSAL ID** field with the ***new Proposal Number***.	The **COPY** button will become enabled.
4	Click the **COPY** button.	The new Proposal will appear on the **Proposal Summary** Page.

Continued on Following Page

Copying a Proposal

(continued)



You will be able to change any of the information on **the General tab** except the **Proposal ID** that you have just entered.

If, for any reason you need to change the **Proposal ID**, send an email to awphelp@ncdot.gov.

If you need assistance, see **Adding a Proposal - General Tab** on **Page 4-6**.

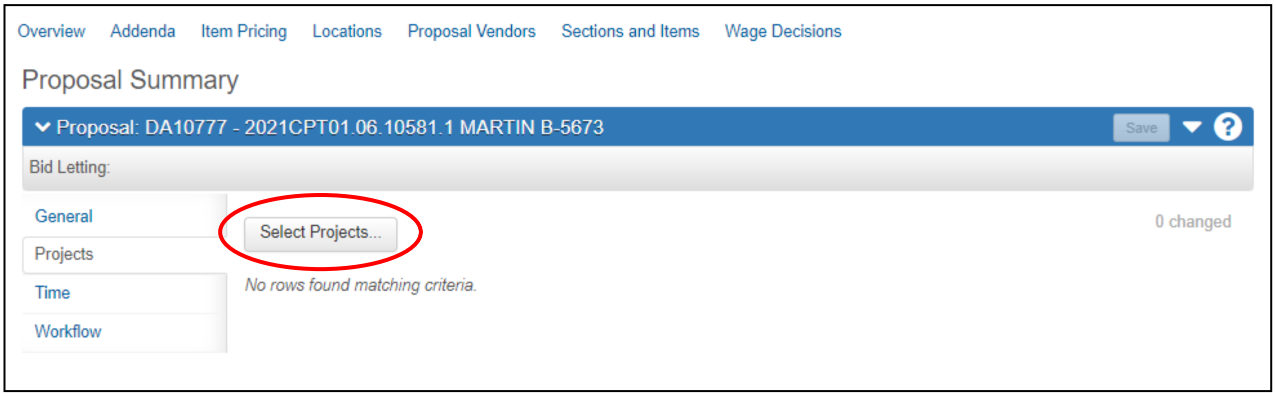
*On **Step 12** remember to add the **previous proposal number**.

5	When you have finished entering information on the **General** tab, click the **Projects** tab.	The **Projects** tab will appear.

Continued on Following Page

Copying a Proposal

(continued)



The projects from the copied proposal have not been copied.

You will be able to add projects here.

From here, check and correct proposal data by following the steps in **Adding a Proposal** on **Page 4-5**.

If you wish to copy a proposal that is linked to a **Letting**, you must first unlink it from the **Letting** before it can be copied.

The procedures for **Unlinking a Proposal From a Letting** are on **Page 5-8**.

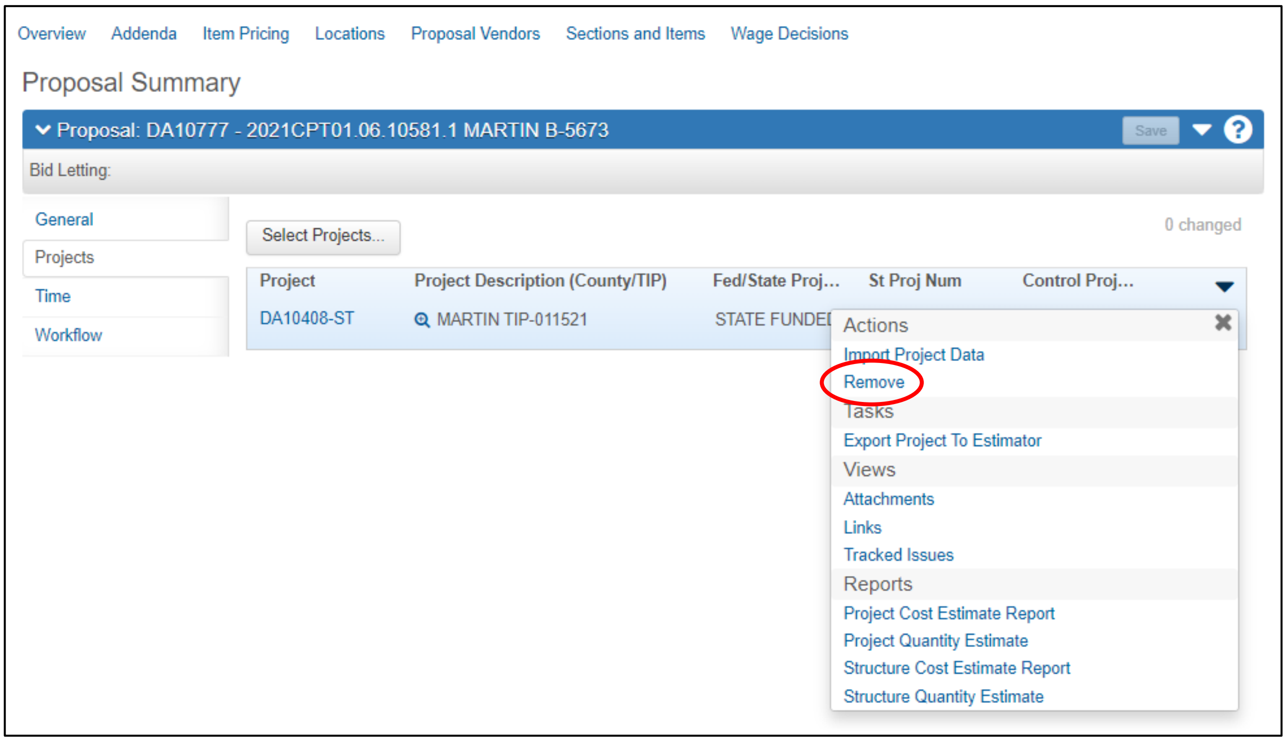
After that you will be able to re-link the correct proposal to the letting (**Linking Proposals to the Letting** on **Page 5-4**) and if necessary, delete the extraneous proposal (**Deleting a Proposal** on **Page 4-36**).

Removing a Project from a Proposal

If a project has been added by mistake, you can disconnect it from the proposal by doing the following:

Follow the procedure for **Finding a Proposal** on **Page 4-1**.

From the ***Proposal Summary*** page:



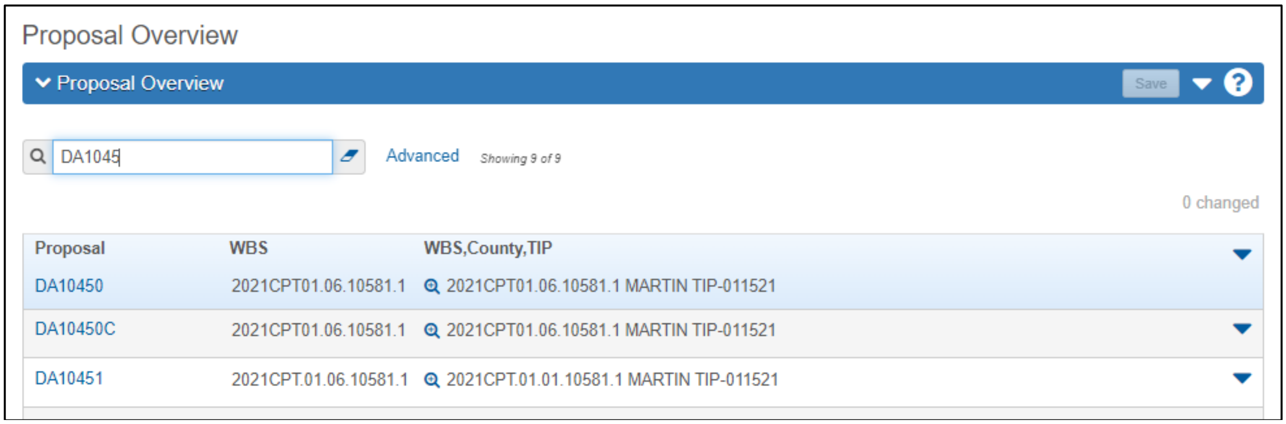
Step	Action	Result
1	Click the drop-down arrow on the right side of the project.	A drop-down menu will appear.
2	Select, **REMOVE**.	A ***Save Complete*** message will appear above the **Header Bar**.

This will disassociate the selected project from the proposal.

Pricing Items

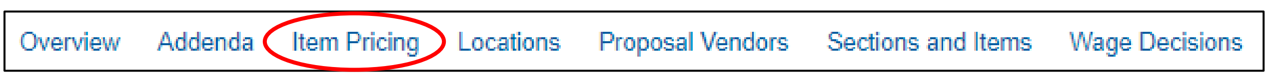
From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	In the **Preconstruction** section, click **PROPOSALS**.	The **Proposal Overview** page will appear.



2	Find the proposal using the procedure on **Page 4-1**.

From the ***Proposal Summary*** page:



3	Click the **ITEM PRICING** quick link.	The **Price Proposal Items** page will appear.

Continued on Following Page

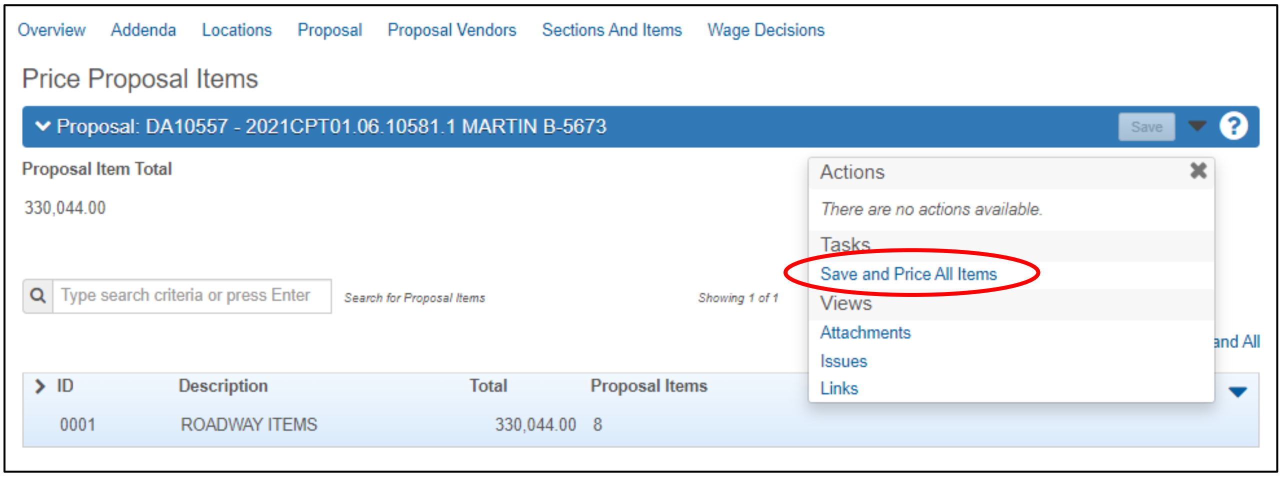
Pricing Items

(continued)

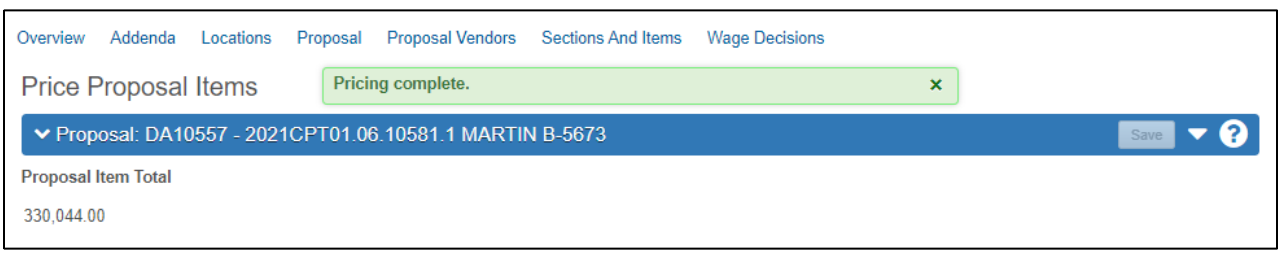
Bid-Based Pricing

This process assigns each pay item in the proposal an estimated unit price based on historical information in the system.

By running the process, you will overwrite any previous pricing on all items, unless the **PRICE** field is locked.



4	Select **SAVE AND PRICE ALL ITEMS** from the drop-down list in the **Header Bar**.	A ***Pricing Complete*** message will appear above the **Header Bar**.



🗁**NOTE:** Prices are populated to the associated projects and proposals in the system. This can be viewed from the **Item Worksheet** quick link on projects linked to the proposal.

Continued on Following Page

Pricing Items

(continued)

Manual Pricing

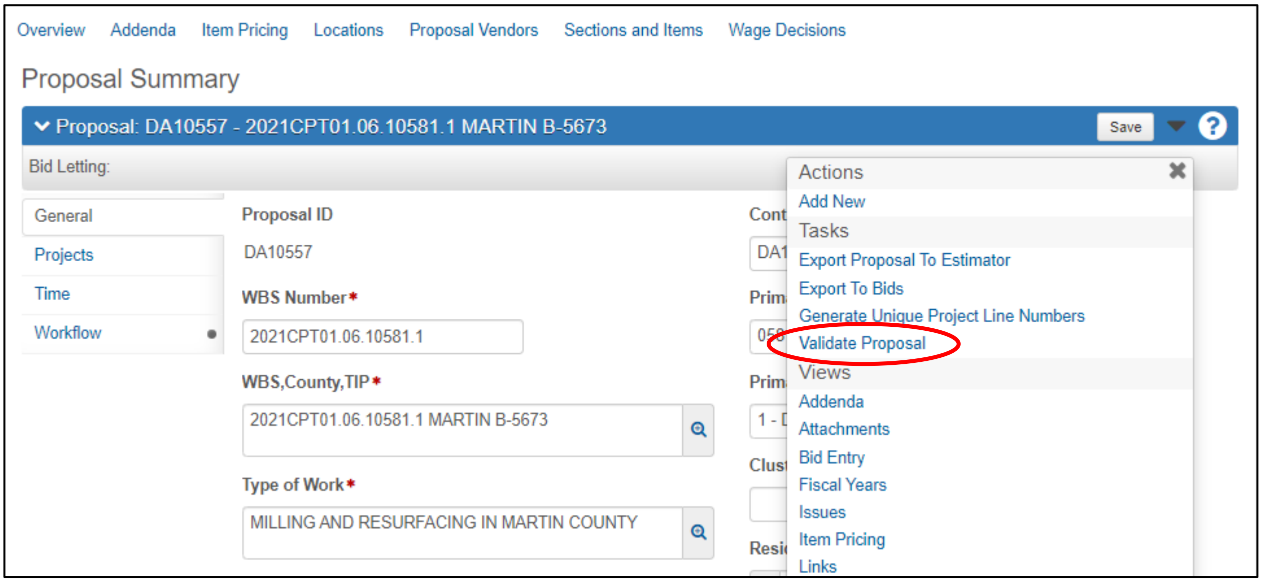
5	Expand the first proposal section by clicking the arrow to the left of the **ID** field.	The list of items in the section will appear.
6	If there are empty price fields, type ***the price for the item*** in the **PRICE** field. Repeat for each remaining item.	The **EXT AMT** field will be calculated.

If the proposal contains multiple sections, repeat steps 5 and 6 for each section.

7	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

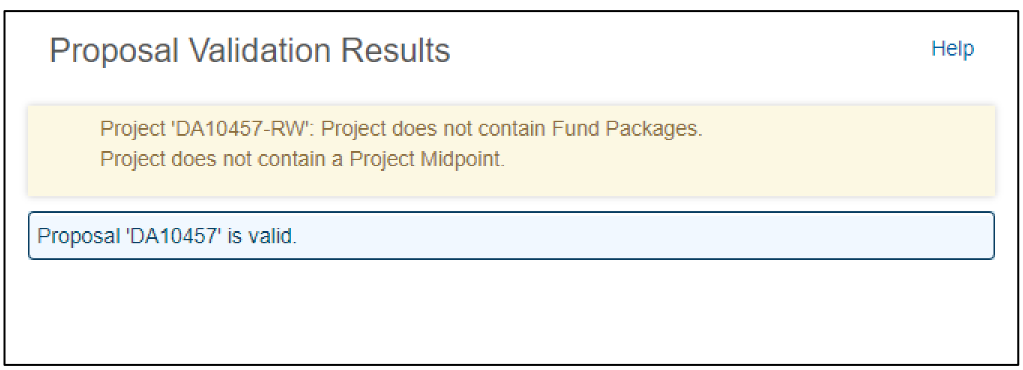
Validating a Proposal

From within a proposal, on the **Proposal Summary** page:



(*Proposal Summary Page*)

Step	Action	Result
1	From the drop-down arrow at the right side of the **Header Bar** select ***Validate Proposal***.	The **Proposal Validation Results** popup will appear.



(*Proposal Validation Results Popup*)

Continued on Following Page

Validating a Proposal

(continued)

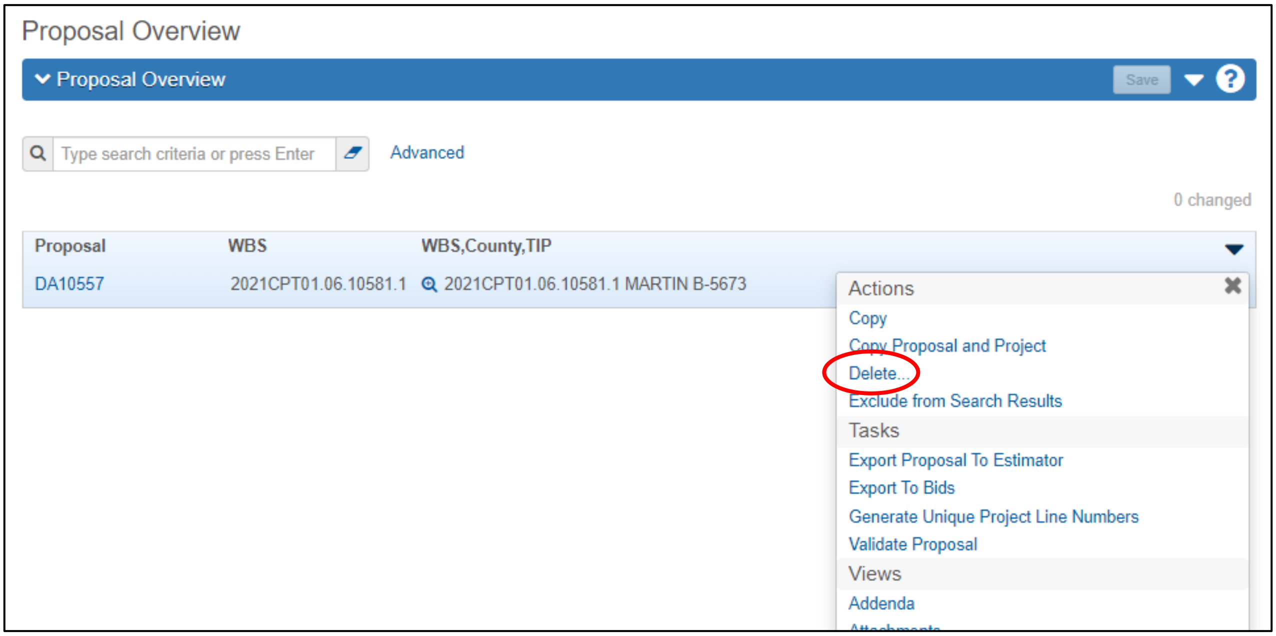
Proposal Validation has run, and the proposal has been checked for errors. Any errors that are found will be displayed in this popup.

The following types of messages can be ignored:

- Project Midpoint
- Fund Packages – We use WBS numbers.

Deleting a Proposal

From the **Proposal Overview** page:



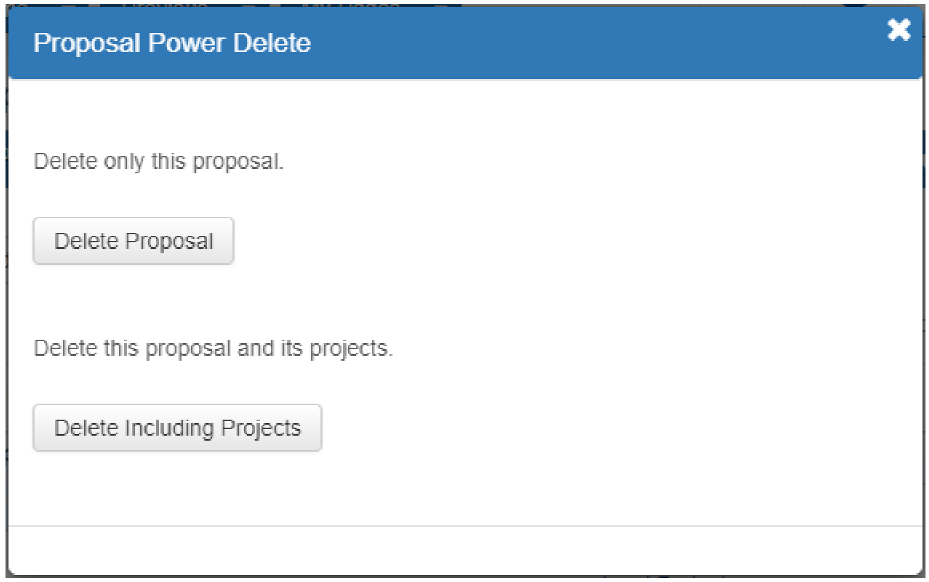
(*Proposal Overview Page*)

Step	Action	Result
1	From the drop-down arrow at the right side of the ***proposal you wish to delete*** select **DELETE**.	The **Proposal Power Delete** dialog will appear.

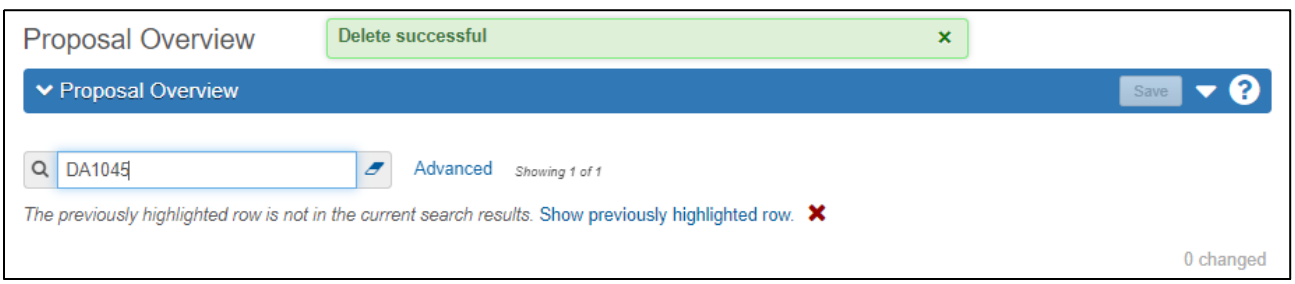
Continued on Following Page

Deleting a Proposal

(continued)



2	If you wish to delete only the proposal, click the **DELETE PROPOSAL** button. If you wish to delete the proposal and all projects associated with it, click the **DELETE INCLUDING PROJECTS** button.	The proposal will be removed from the list and a ***Delete Successful*** message will appear above the **Header Bar.**

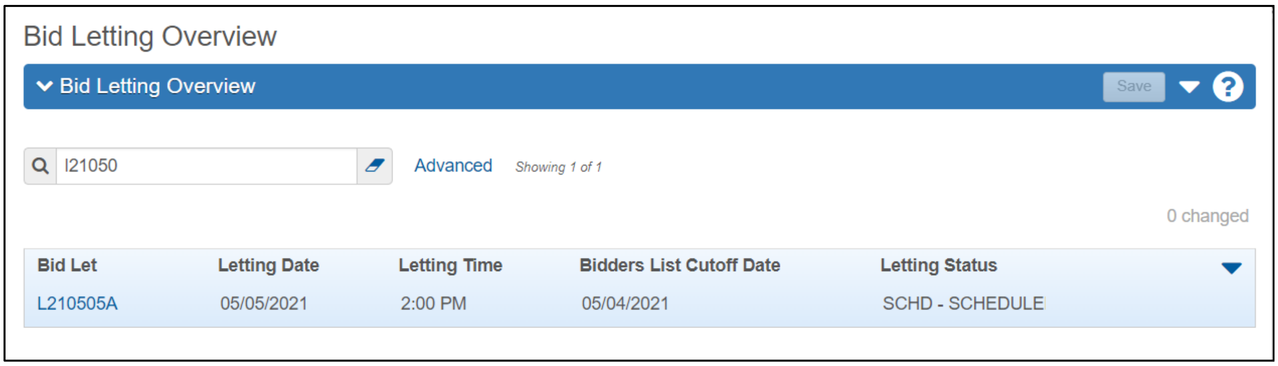


Chapter 5 Letting Setup

Finding a Letting

From the ***AASHTOWare Project Dashboard:***

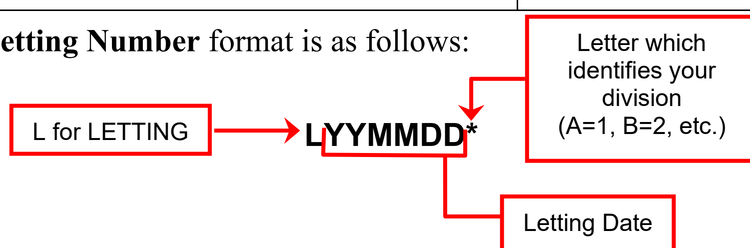
Step	Action	Result
1	In the **Preconstruction** section, click **LETTINGS**.	The **Bid Letting Overview** page will appear.



Step	Action	Result
2	Type ***the letting number*** in the search filter. The results will auto filter as you type.	The letting will appear in the results.

Letting Number Format

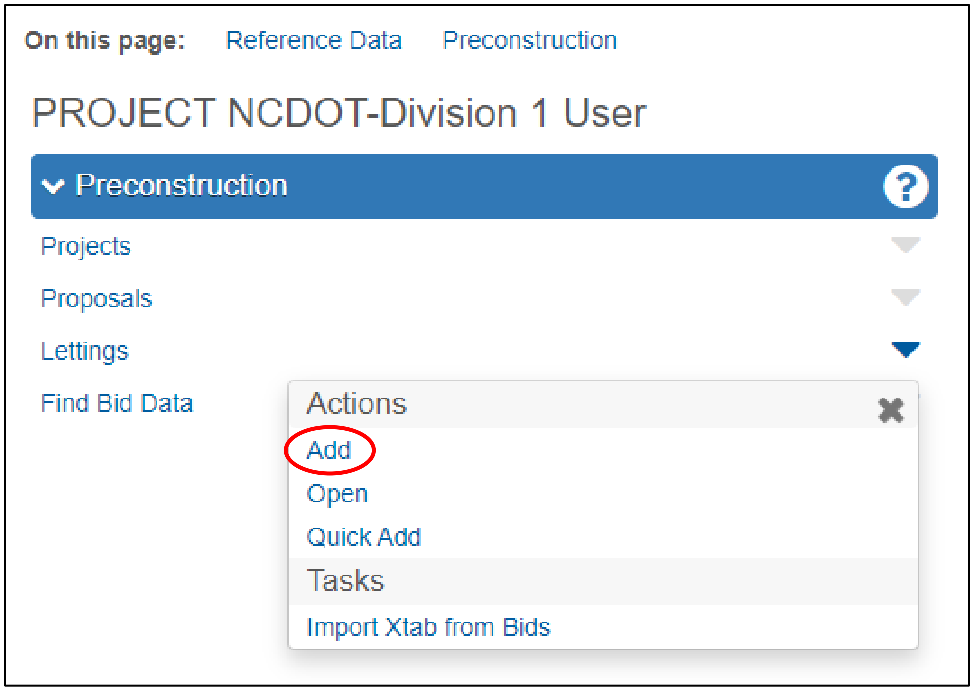
Letting Number format is as follows:



Step	Action	Result
3	Click on the **LETTING NUMBER** you wish to open.	The letting will open.

Creating a Letting

From the ***AASHTOWare Project Dashboard:***



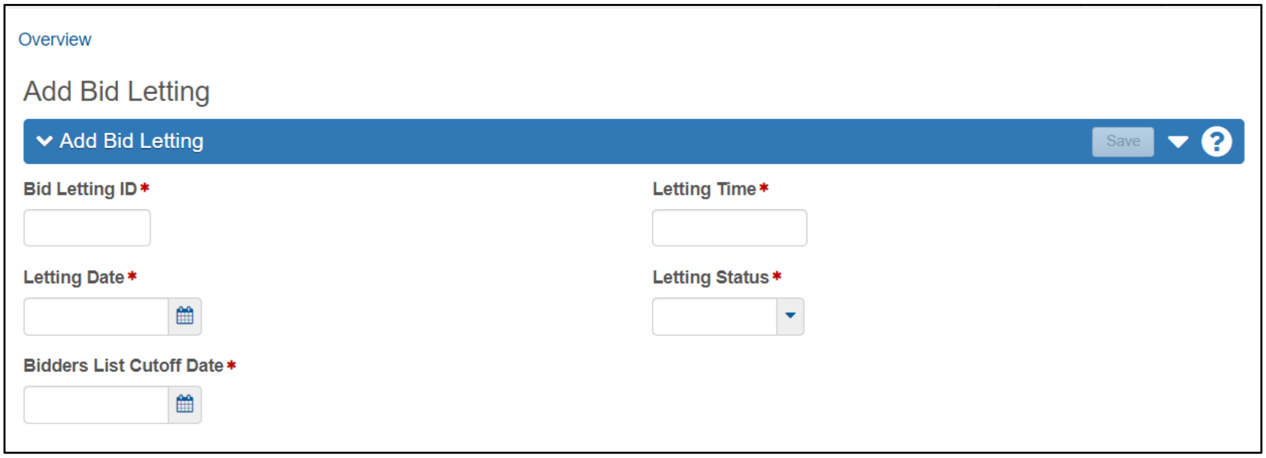
(*Preconstruction Menu*)

Step	Action	Result
1	In the **Preconstruction** section, click the drop-down arrow to the right of LETTINGS. **NOTE:** You can also perform this step from the **Bid Letting Overview Page** shown on **Page 5-1**.	A menu will appear.
2	Click ADD.	The **Add Bid Letting** page will appear.

Continued on Following Page

Creating a Letting

(continued)



(Add Bid Letting Page)

General Tab

🗁**NOTE:** Fields marked with a red asterisk (*) are required to save the Letting.

3	Turn on **CAPS LOCK** by pressing the CapsLock key. All information entered into the system must be in ALL CAPS.	N/A
4	Type ***the bid letting ID*** in the **BID LETTING ID** field.	N/A

Letting Number Format

Letting Number format is as follows:

LYYMMDD*

- **L for LETTING**
- **YYMMDD: Letting Date**
- ***: Letter which identifies your division (A=1, B=2, etc.)**

5	Type ***the letting date*** in the **LETTING DATE** field. 🗁**NOTE:** If you click the **CALENDAR** button, a popup calendar will allow you to select the date so that it appears in the field.	N/A

Continued on Following Page

Creating a Letting

(continued)

6	Type ***the date one business day before the letting date*** in the **BIDDERS LIST CUTOFF DATE** field. 🗁**NOTE:** If you click the **CALENDAR** button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
7	Type ***the letting time*** in the **LETTING TIME** field. 🗁**NOTE:** Use the format **H:MM PM** For example: 10:00 AM 2:00 PM 1:45 PM	N/A

🗁**NOTE:** Do not include any extraneous punctuation in the letting time. (NO PERIODS)

8	Select ***SCHD (Scheduled)*** from the drop-down list in the **LETTING STATUS** field.	N/A
9	Click the **SAVE** button in the **Header Bar**.	The project will be saved. **The Bid Letting Number** will now appear in the **Header Bar**.

Linking Proposals to the Letting

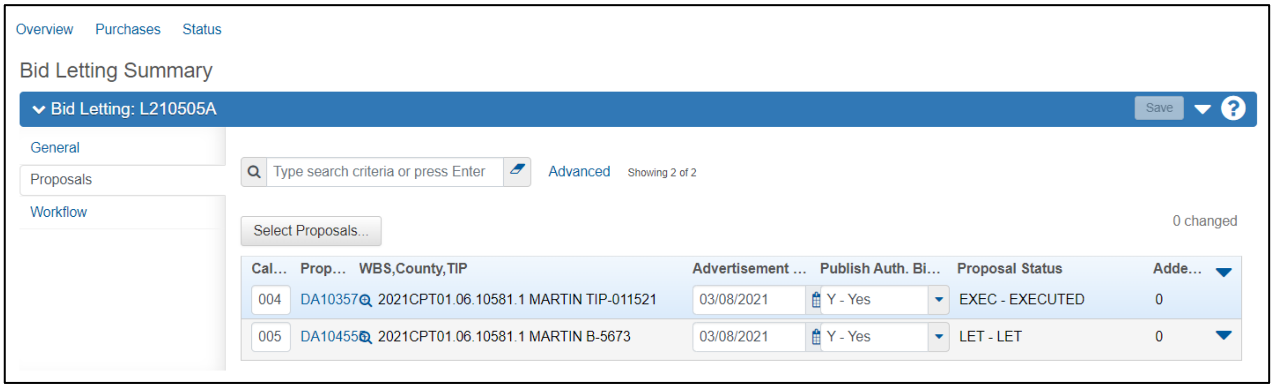
You will select the proposals that will be linked to the letting on this tab.

10	Click on the **Proposals** tab.	The **Proposals** tab will appear.

Continued on Following Page

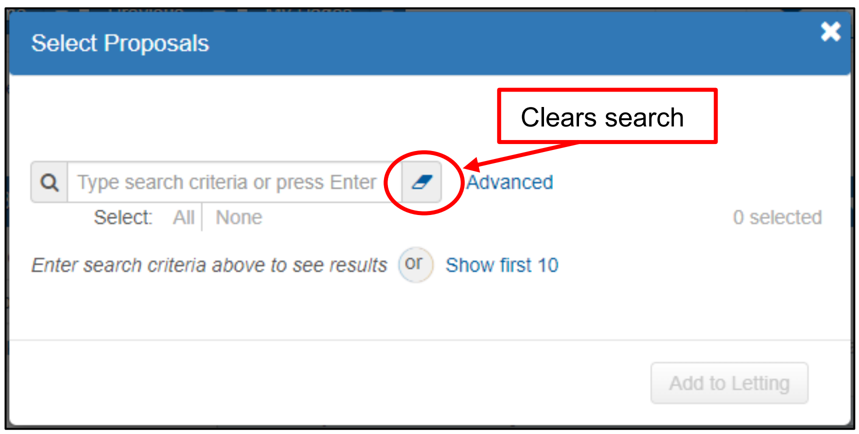
Creating a Letting

(continued)



(*Letting Proposals Tab*)

11	Click the **SELECT PROPOSALS** button.	The **Select Proposals** dialog will appear.



12	The search filter requires 3 characters and will continue auto filtering the list as you type. (See **Finding a Proposal** on **Page 4-1**.)	
13	Click on the **PROPOSAL NUMBER(S)** you wish to add to the letting.	A green check mark will appear to the right of the selected proposal(s).

Continued on Following Page

Creating a Letting

(continued)

14	Click the **ADD TO LETTING** button.	The proposal(s) will be added to the letting.

Repeat steps **11 – 14** until all proposals have been added.

15	Type ***the call number*** in the **CALL NUMBER** field. 🗁**NOTE:** These numbers will be sequential and will begin at **001**. i.e., **001**, **002**, **003**, etc.	N/A

At this point you will skip the **PUBLISH AUTH. BIDDERS** and **PROPOSAL STATUS** fields.

You will be editing this field later in the Letting process. The instructions for this are found in **Setting the Publish Authorized Bidders Field** on **Page 9-1**.

Only type a date in the **ADVERTISEMENT DATE** field when the proposal is ready for advertisement. You can also do this from the proposal itself.

16	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

If you need to remove a proposal from the letting, follow the procedure for **Unlinking a Proposal From a Letting** on **Page 5-8**.

If you wish to copy a proposal that is linked to a **Letting**, you must first unlink it from the **Letting** before it can be copied.

The procedures for **Copying A Proposal** are on **Page 4-26**.

After that you will be able to re-link the correct proposal to the letting (**Linking Proposals to the Letting** on **Page 5-4**) and if necessary, delete the extraneous proposal (**Deleting a Proposal** on **Page 4-36**).

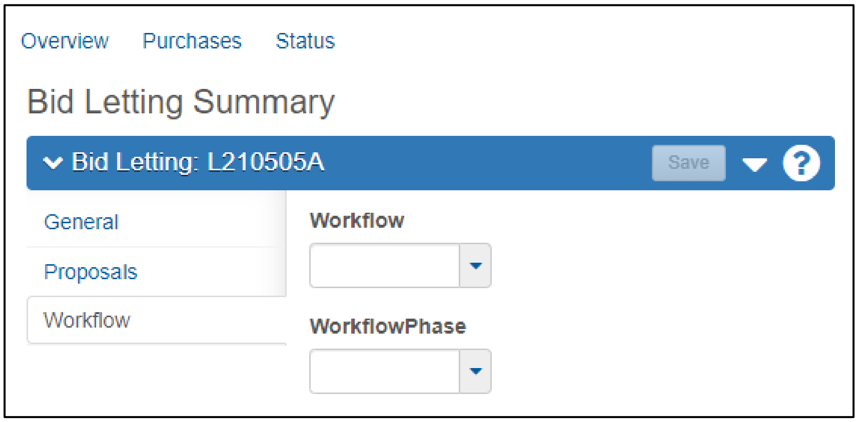
Continued on Following Page

Creating a Letting

(continued)

Workflow Tab

17	Click on the **Workflow** tab.	The **Workflow** tab will appear.



(*Letting Workflow Tab*)

18	Select ***NCDOT – Division Workflow*** from the drop-down list in the **WORKFLOW** field.	Your selection will appear in the **WORKFLOW** field.
19	Select ***Process Bids*** from the drop-down list in the **WORKFLOW PHASE** field.	Your selection will appear in the **WORKFLOW PHASE** field.
20	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Unlinking a Proposal From a Letting

There may be an occasion when a proposal is pulled to be advertised at a later date. Under these circumstances, you will need to unlink the proposal after it has already been set up and linked to a letting.

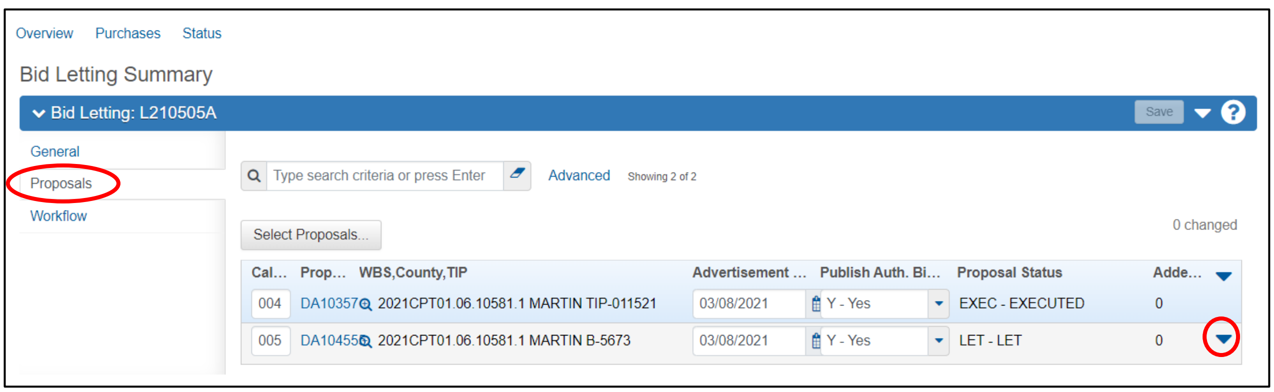
To unlink a proposal, do the following:

IMPORTANT! Please **DO NOT** perform this procedure unless you are certain you wish to unlink a proposal from a letting.

Follow the procedure for **Finding a Letting** on **Page 5-1**.

From the **Bid Letting Summary** page:

Step	Action	Result
1	Click on the **Proposals** tab.	The **Proposals** tab will appear.



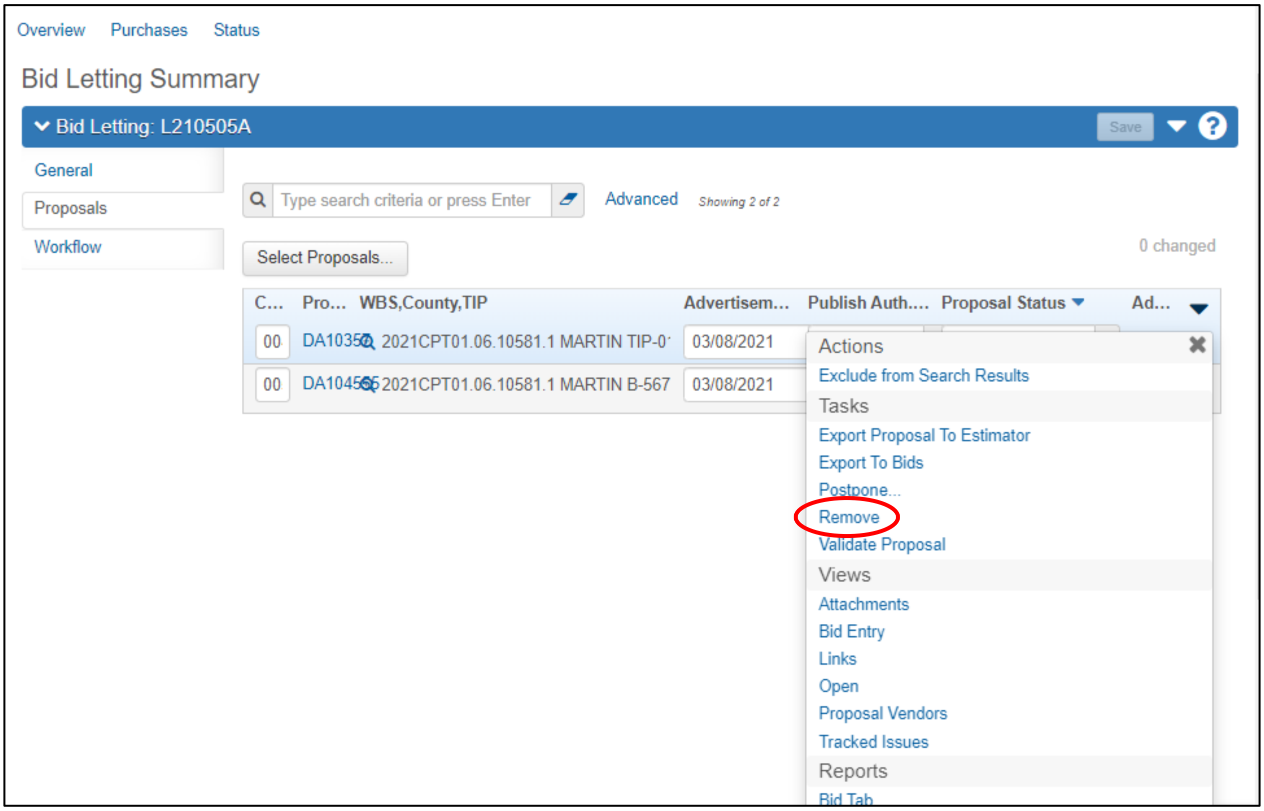
(*Bid Letting Summary – Proposals Tab*)

2	Click the drop-down arrow to the right of the proposal you wish to unlink.	A menu will appear.

Continued on Following Page

Unlinking a Proposal From a Letting

(continued)



3	Verify that this is the correct proposal, (check the call order number), then select **REMOVE** from the menu.	The proposal will be removed and placed back in the list of available proposals.

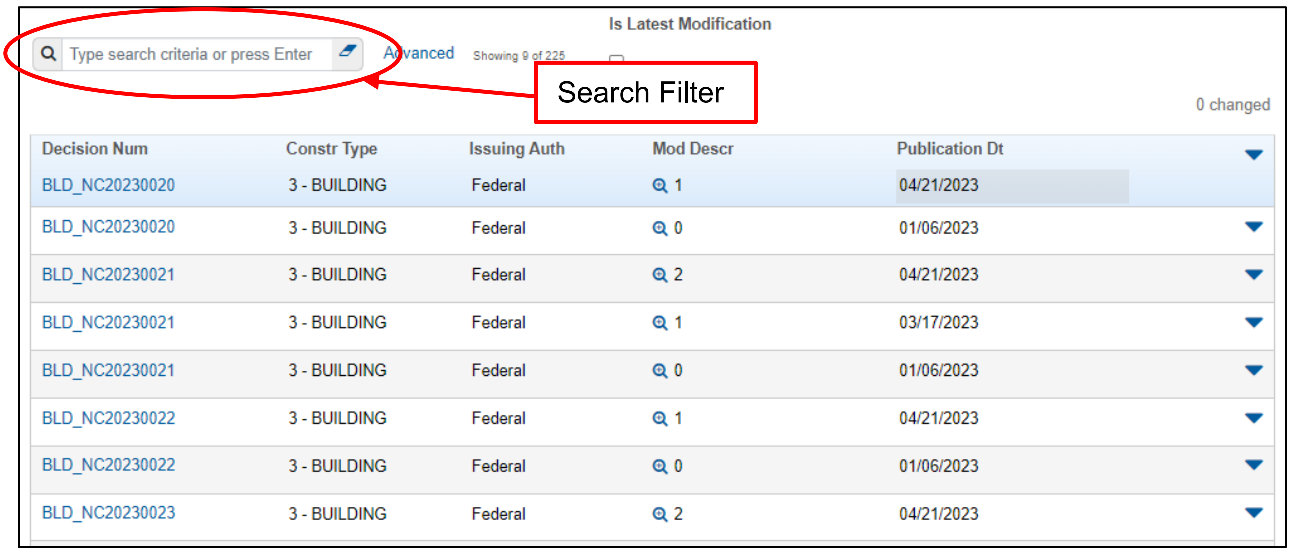
This process will not actually **delete** the proposal. It will simply remove the selected proposal from the letting list. You will still be able to access the proposal after you run this process.

Chapter 6 Wage Decisions

Finding a Reference Wage Decision

From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	In the **Reference Data** section, click on **Wage Decisions**.	The **Wage Decision Overview** page will appear.



Step	Action	
2	The search filter requires 3 characters and will continue auto filtering the list as you type.	

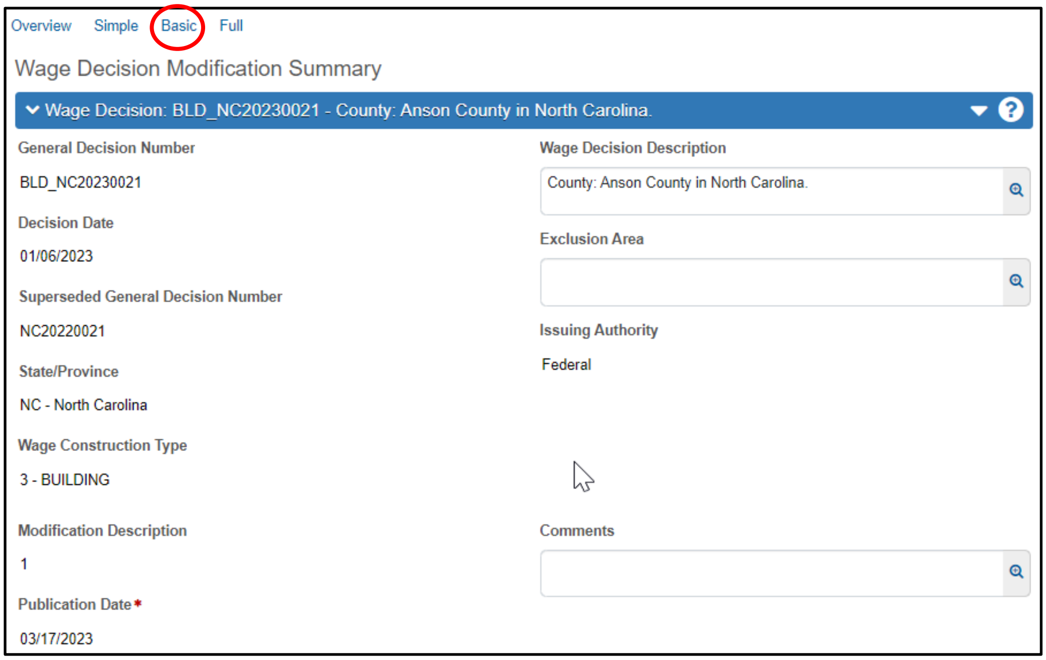
Criteria	Result
Decision Number	The unique identifier of the Reference Wage Decision Decision Numbers will contain a prefix denoting what construction type they are: HWY Highway BLD Building HVY Heavy
Partial Decision Number	A list of Reference Wage Decisions that contain the criteria
Publication Date	The date the associated record is published or scheduled to be published

Continued on Following Page

Finding a Reference Wage Decision

(continued)

3	Click on the **DECISION NUMBER** you wish to open.	The **Wage Decision Modification Summary** page will appear.



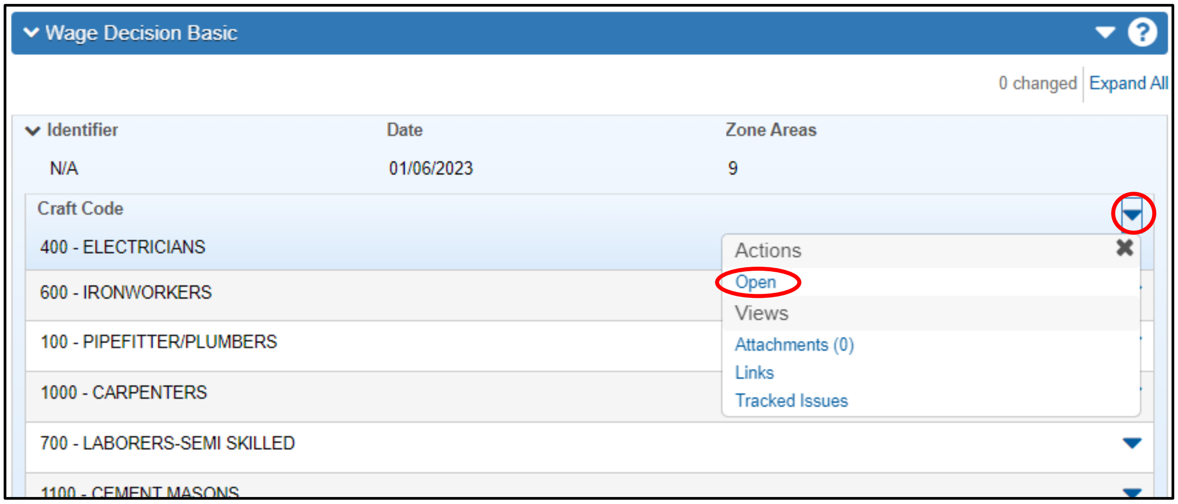
4	Click the **BASIC** link at the top of the window.	The **Wage Decision Basic View** window will appear
5	Scroll to the bottom of the page.	N/A

6	In the **Wage Decision Basic** section, click the arrow next to **IDENTIFIER**.	The list of **Craft Codes** will expand.

Continued on Following Page

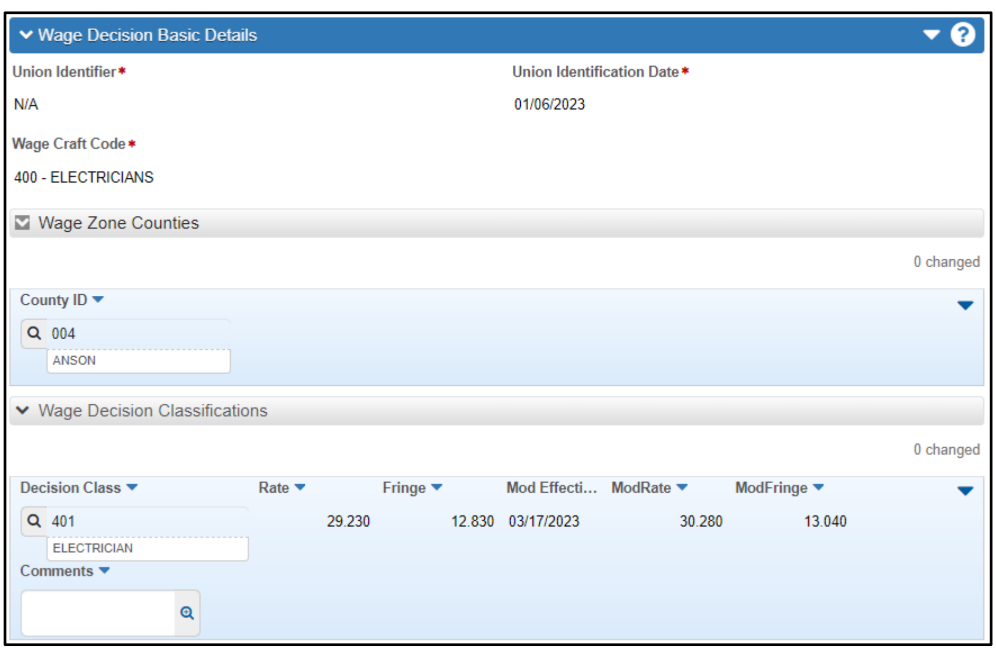
Finding a Reference Wage Decision

(continued)



7	Click the **down arrow** on the right side of the **craft code** you wish to view.	A menu will appear.
8	Select **OPEN** from the menu.	The **Wage Decision Classifications Basic** window will appear.

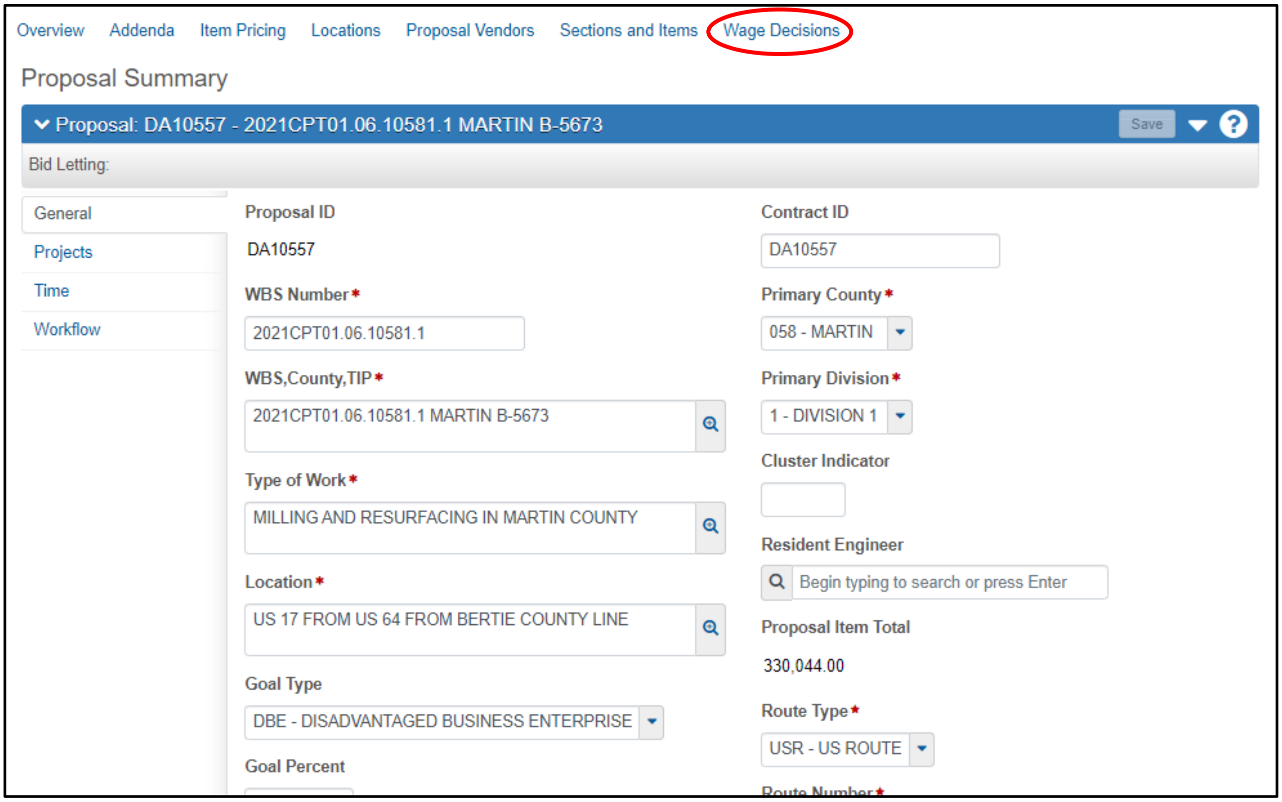
At the bottom of the page, in the **Wage Decision Basic Details** section, all details for the selected craft code will appear.



Viewing a Wage Decision in a Proposal

Follow the procedure for **Finding a Proposal** on **Page 4-1**.

From the ***Proposal Summary*** page:

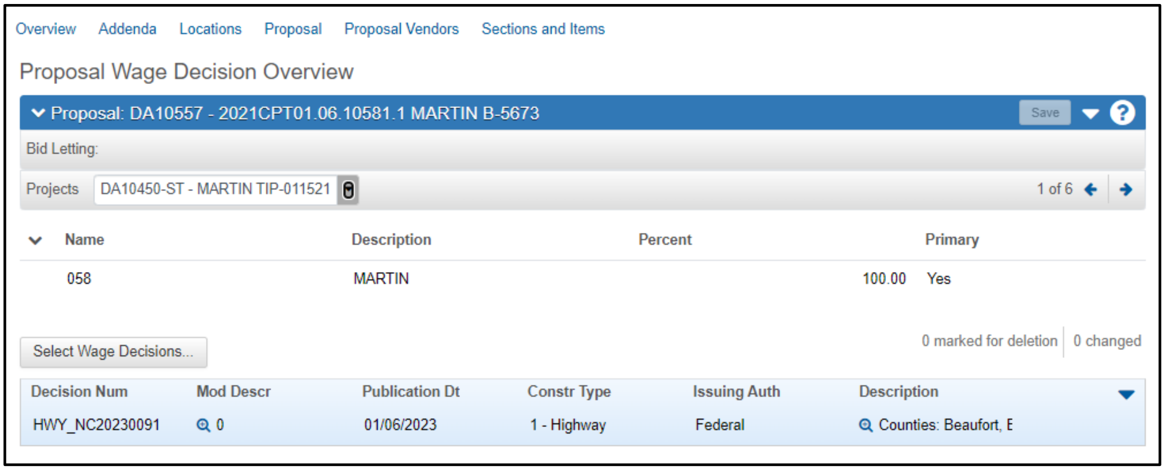


Step	Action	Result
1	Click the **Wage Decisions** link at the top of the window.	The **Proposal Wage Decision Overview** page will appear.

Continued on Following Page

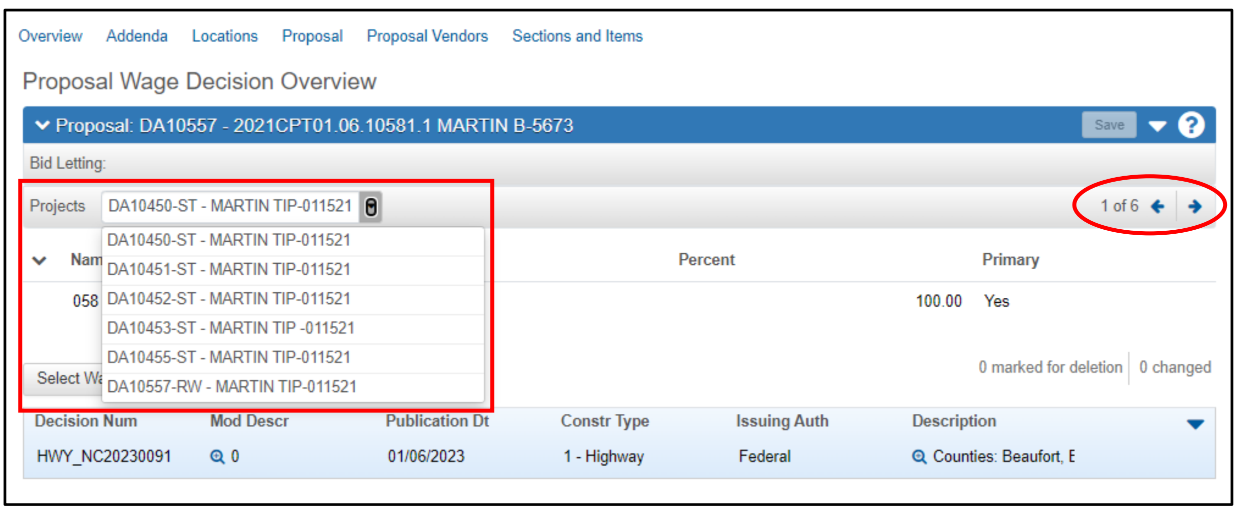
Viewing a Wage Decision in a Proposal

(continued)



The wage decisions have been added to every project in the proposal.

You will be able to view each project from the **PROJECTS** drop-down list or by clicking the navigation arrows.



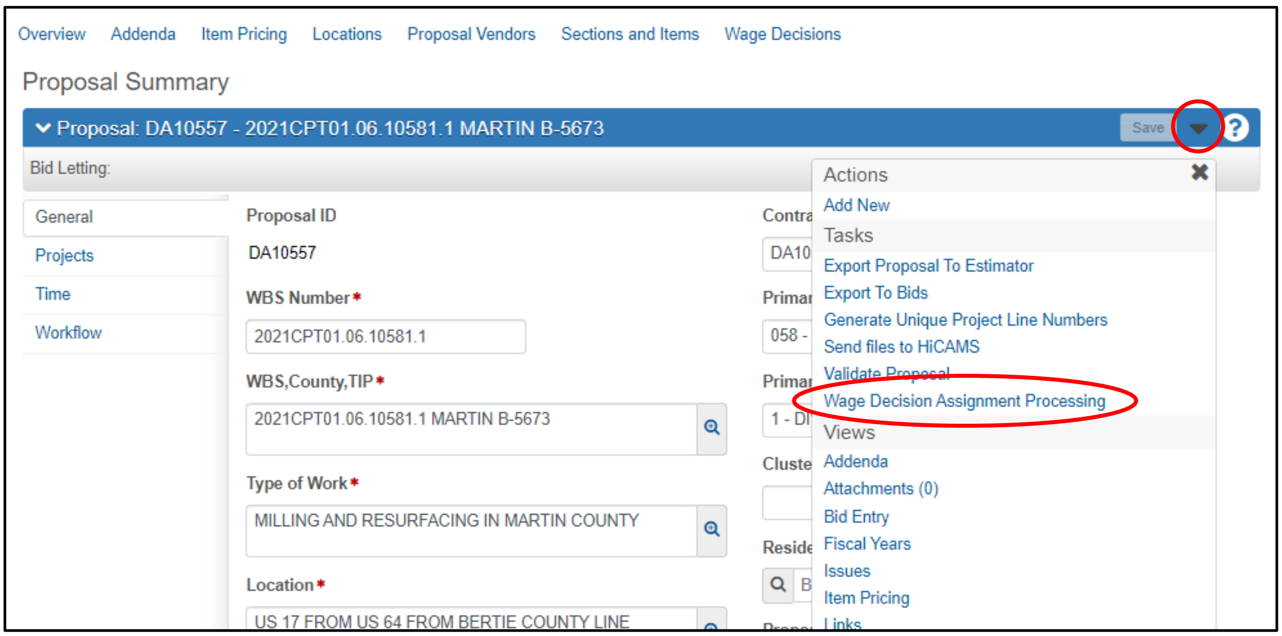
Assigning a Wage Decision to a Proposal/Project from the Proposal

In order to assign a wage decision to a proposal:

- The proposal must have at least one project with at least one County assigned to it.
- The Letting Date must be later than the Wage Decision Date.

Follow the procedure for **Finding a Proposal** on **Page 4-1**.

From the ***Proposal Summary*** page:

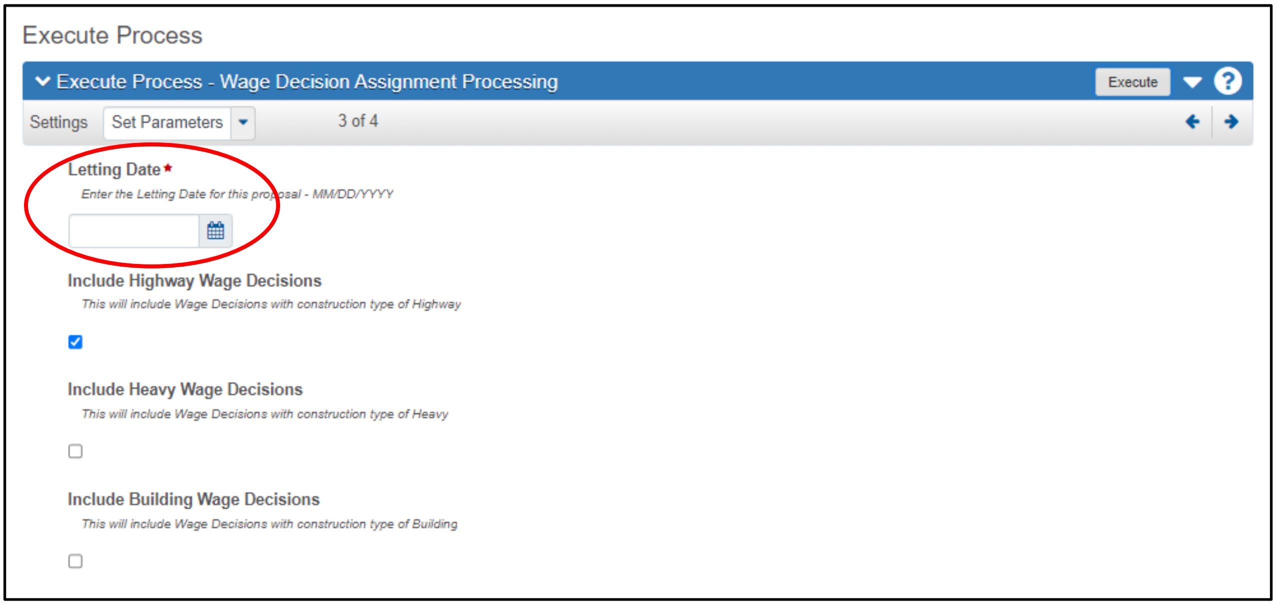


Step	Action	Result
1	Click the down arrow on the right side of the Title Bar.	A drop-down menu will appear.
2	Select **WAGE DECISION ASSIGNMENT PROCESSING** from the menu.	The **Execute Process** page will appear.

Continued on Following Page

Assigning a Wage Decision to a Proposal/Project from the Proposal

(continued)



3	Type ***the Letting Date*** in the **LETTING DATE** field. (or select it from the calendar)	N/A

🗁**NOTE:** By default, the **INCLUDE HIGHWAY WAGE DECISIONS** check box is checked. This will add the appropriate ***Highway Wage Decisions*** to all projects in the proposal

4	If applicable, check the **INCLUDE HEAVY WAGE DECISIONS** check box.	N/A
5	If applicable, check the **INCLUDE BUILDING WAGE DECISIONS** check box.	N/A
6	Click the **EXECUTE** button.	The results of the process will appear in a new browser tab.

Continued on Following Page

Assigning a Wage Decision to a Proposal/Project from the Proposal

(continued)

```
5/17/2023 10:13:59 AM: Info - Start of WageDecisionAssignmentProcessing. Version: 2023.4.28.1
5/17/2023 10:14:05 AM: Info - Processing proposal Id: DA10557
5/17/2023 10:14:05 AM: Info - Project Counts: 6
5/17/2023 10:14:05 AM: Info - Deleted Wage Decisions: HWY_NC20230091 for Project Name: DA10451-ST
5/17/2023 10:14:09 AM: Info - Deleted Wage Decisions: HWY_NC20230091 for Project Name: DA10452-ST
5/17/2023 10:14:10 AM: Info - Deleted Wage Decisions: HWY_NC20230091 for Project Name: DA10450-ST
5/17/2023 10:14:10 AM: Info - Deleted Wage Decisions: HWY_NC20230091 for Project Name: DA10453-ST
5/17/2023 10:14:11 AM: Info - Deleted Wage Decisions: HWY_NC20230091 for Project Name: DA10455-ST
5/17/2023 10:14:11 AM: Info - Deleted Wage Decisions: HWY_NC20230091 for Project Name: DA10557-RW
5/17/2023 10:14:12 AM: Info - Added Wage Decisions: NC20220091 for Project Name: DA10451-ST
5/17/2023 10:14:12 AM: Info - Added Wage Decisions: NC20220091 for Project Name: DA10452-ST
5/17/2023 10:14:12 AM: Info - Added Wage Decisions: NC20220091 for Project Name: DA10450-ST
5/17/2023 10:14:12 AM: Info - Added Wage Decisions: NC20220091 for Project Name: DA10453-ST
5/17/2023 10:14:12 AM: Info - Added Wage Decisions: NC20220091 for Project Name: DA10455-ST
5/17/2023 10:14:12 AM: Info - Added Wage Decisions: NC20220091 for Project Name: DA10557-RW
5/17/2023 10:14:14 AM: Info - Completed Processing proposal Id: DA10557
5/17/2023 10:14:14 AM: Info - End of WageDecisionAssignmentProcessing
```

The wage decisions will be added to every project in the proposal.

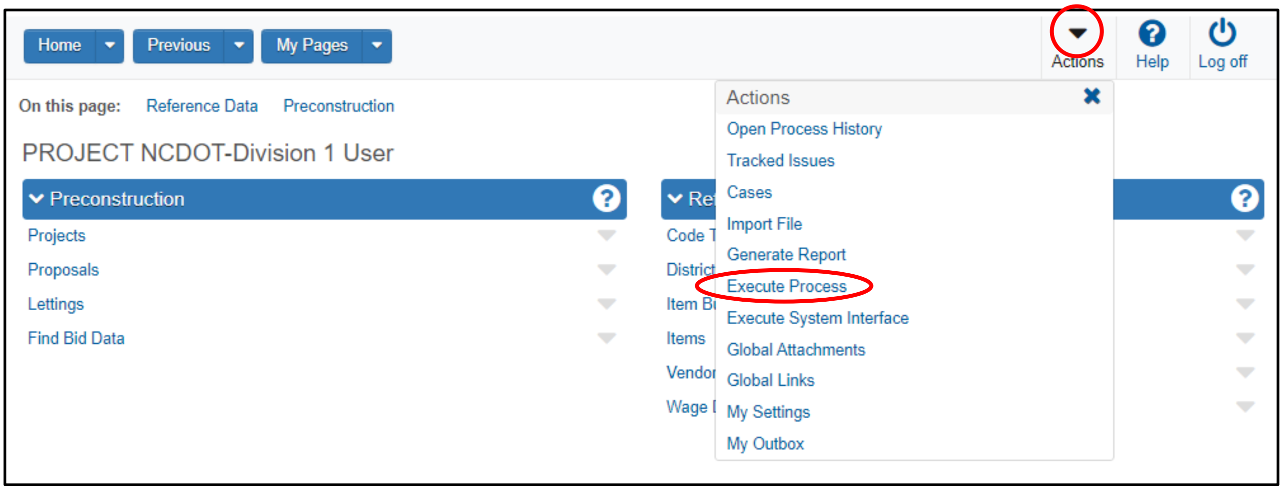
🗁**NOTE:** Each time this process is run, the previous results will be deleted and replaced by the results of the new process.

Assigning a Wage Decision to Multiple Proposals/Projects from the AWP Dashboard

In order to assign a wage decision to a proposal:

- The proposal must have at least one project with at least one County assigned to it.
- The Letting Date must be later than the Wage Decision Date.

From the ***AASHTOWARE Project Dashboard*** page:



Step	Action	Result
1	From the **ACTIONS** menu at the top of the window, select ***Execute Process***.	The **Execute Process** page will appear.
2	Select **WAGE DECISION ASSIGNMENT PROCESSING**.	The **Select Data** page will appear.
3	Type ***the proposal number*** in the **SEARCH** box.	The list of proposals will be filtered by the value in the **SEARCH** box.

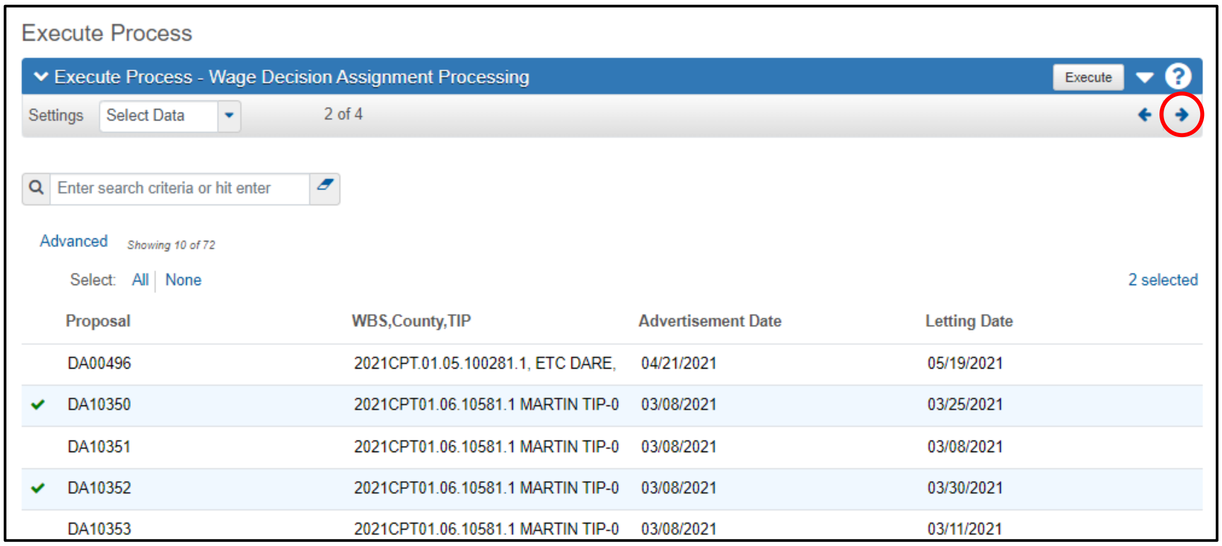
Continued on Following Page

Assigning a Wage Decision to Multiple Proposals/Projects from the AWP Dashboard

(continued)

4	Click on ***the Proposal*** to select it.	A green check mark will appear next to the selected proposal.

NOTE: You will be able to select multiple proposals here.

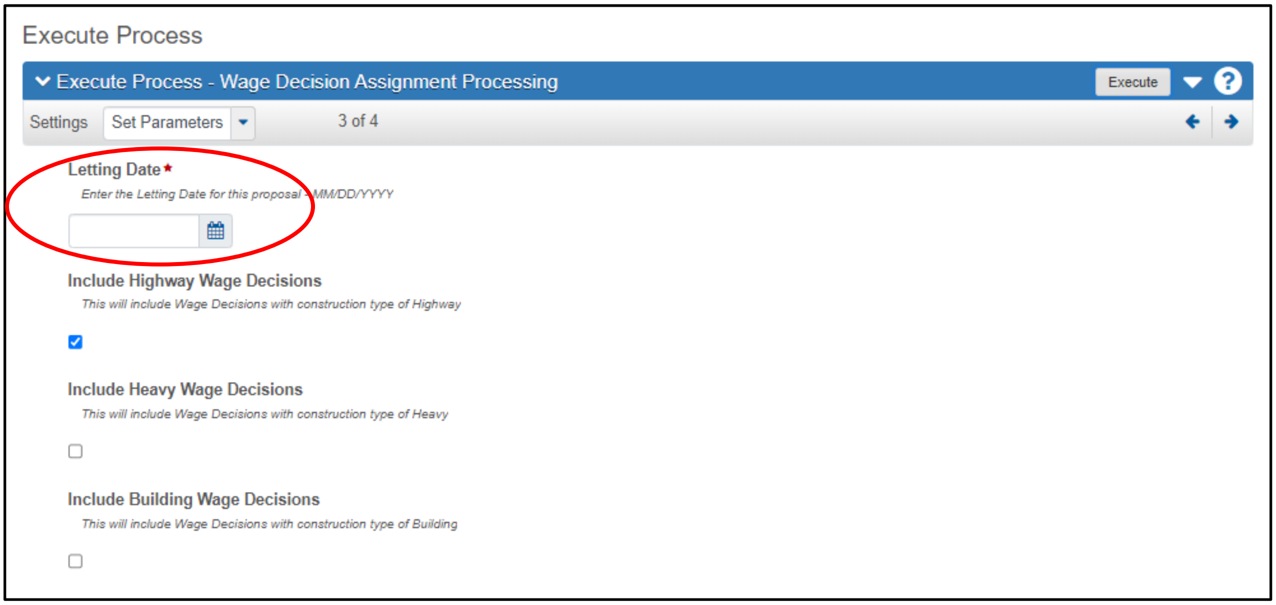


5	Click the **RIGHT ARROW** button.	The **Execute Process Parameters** page will appear.

Continued on Following Page

Assigning a Wage Decision to Multiple Proposals/Projects from the AWP Dashboard

(continued)



6	Type ***the Letting Date*** in the **LETTING DATE** field. (or select it from the calendar)	N/A

NOTE: By default, the **INCLUDE HIGHWAY WAGE DECISIONS** check box is checked. This will add the appropriate ***Highway Wage Decisions*** to all projects in the proposal

7	If applicable, check the **INCLUDE HEAVY WAGE DECISIONS** check box.	N/A
8	If applicable, check the **INCLUDE BUILDING WAGE DECISIONS** check box.	N/A
9	Click the **EXECUTE** button.	The results of the process will appear in a new browser tab.

Continued on Following Page

Assigning a Wage Decision to Multiple Proposals/Projects from the AWP Dashboard

(continued)

```
5/17/2023 5:00:17 PM: Info - Start of WageDecisionAssignmentProcessing. Version: 2023.4.28.1
5/17/2023 5:00:34 PM: Info - Processing proposal Id: DA10350
5/17/2023 5:00:34 PM: Info - Project Counts: 1
5/17/2023 5:00:34 PM: Info - Deleted Wage Decisions: HWY_NC20230091 for Project Name: DA10350-RW
5/17/2023 5:00:38 PM: Info - Deleted Wage Decisions: HVY_NC20230069 for Project Name: DA10350-RW
5/17/2023 5:00:39 PM: Info - Added Wage Decisions: HWY_NC20230091 for Project Name: DA10350-RW
5/17/2023 5:00:41 PM: Info - Completed Processing proposal Id: DA10350
5/17/2023 5:00:41 PM: Info - Processing proposal Id: DA10352
5/17/2023 5:00:41 PM: Info - Project Counts: 1
5/17/2023 5:00:41 PM: Info - Added Wage Decisions: HWY_NC20230091 for Project Name: DA10352-RW
5/17/2023 5:00:42 PM: Info - Completed Processing proposal Id: DA10352
5/17/2023 5:00:42 PM: Info - End of WageDecisionAssignmentProcessing
```

The wage decisions will be added to every project in the proposal.

🗁**NOTE:** Each time this process is run, the previous results will be deleted and replaced by the results of the new process.

Chapter 7 Advertisement

Before an advertisement for a letting can be generated, you must confirm the following:

A. The bid letting you wish to advertise has been set up in AWP.

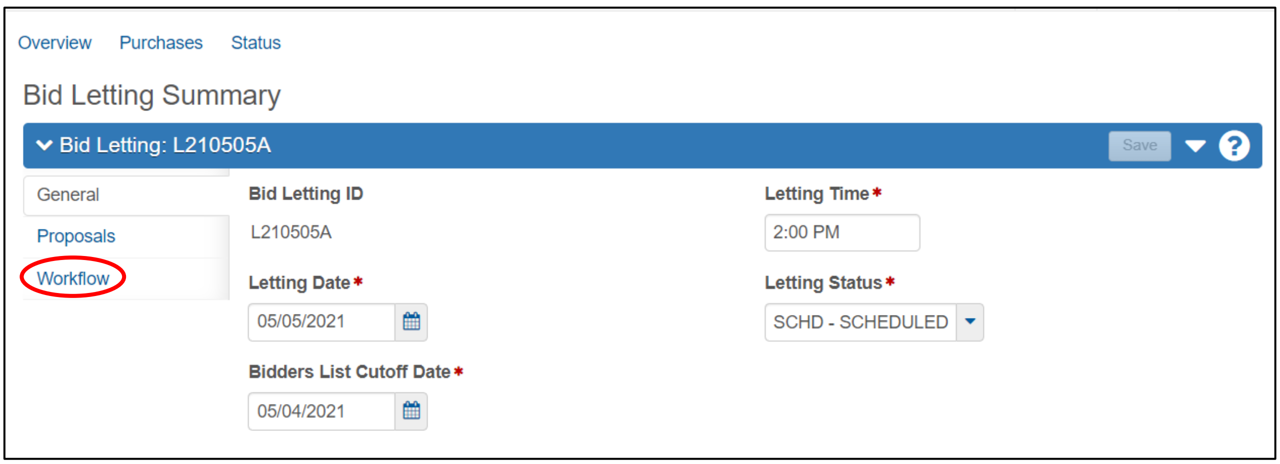
B. You have created a letting proposal for each proposal that will be advertised.

C. All **Workflow Phases** have been changed to **Process Bids**. (First in the **Letting**, then in the associated **Proposals** that will be advertised.)

Changing the Workflow Phase

Follow the procedure for **Finding a Letting** on **Page 5-1**.

From the ***Bid Letting Summary*** page:



In the Letting

Step	Action	Result
1	On the left side of the page, click on the **Workflow** tab.	The **Workflow** tab will appear.
2	Select ***NCDOT – Division Workflow*** from the drop-down list in the **WORKFLOW** field.	Your selection will appear in the **WORKFLOW** field.

Continued on Following Page

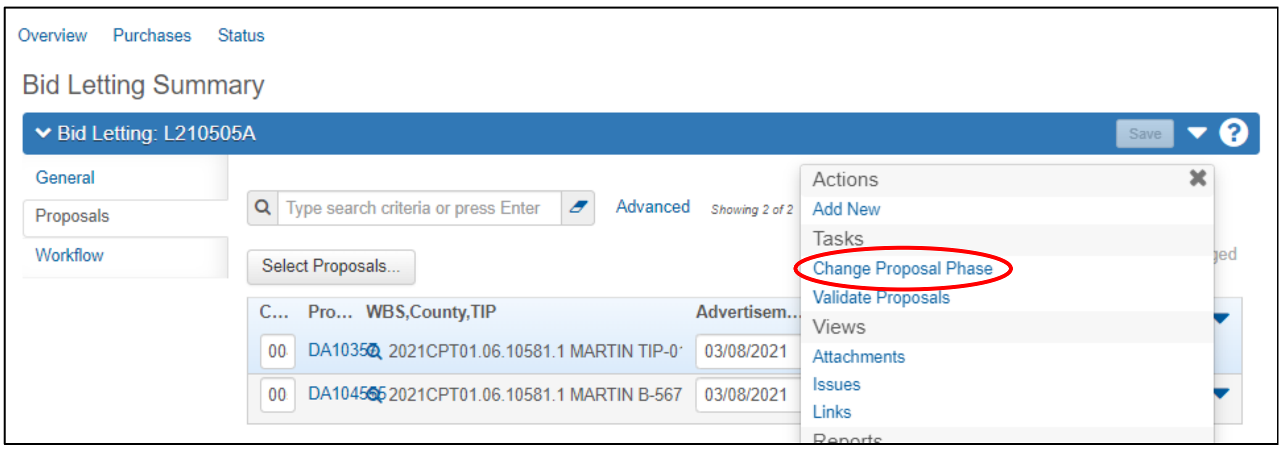
Changing the Workflow Phase

(continued)

3	Select ***Process Bids*** from the drop-down list in the **Workflow Phase** field.	Your selection will appear in the **Workflow Phase** field.
4	Click the **Save** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

In the Proposals

5	On the left side of the page, click on the **Proposals** tab.	The **Proposals** tab will appear.



(*Bid Letting Summary Page – Proposals Tab*)

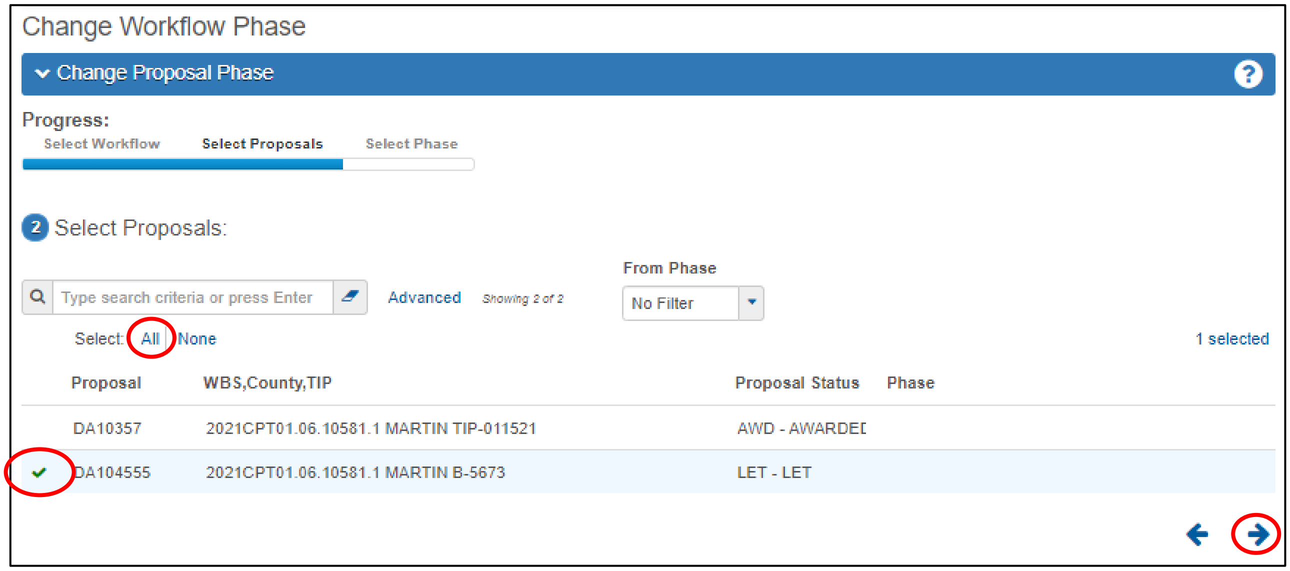
6	Click the drop-down arrow at the right side of the **Header Bar**.	A list of options will appear.
7	Select ***Change Proposal Phase*** from the list.	The **Change Workflow Phase** page will appear.
8	Select ***NCDOT – Division Workflow*** from the drop-down list in the **Workflow** field.	Your selection will appear in the **Workflow** field.

Continued on Following Page

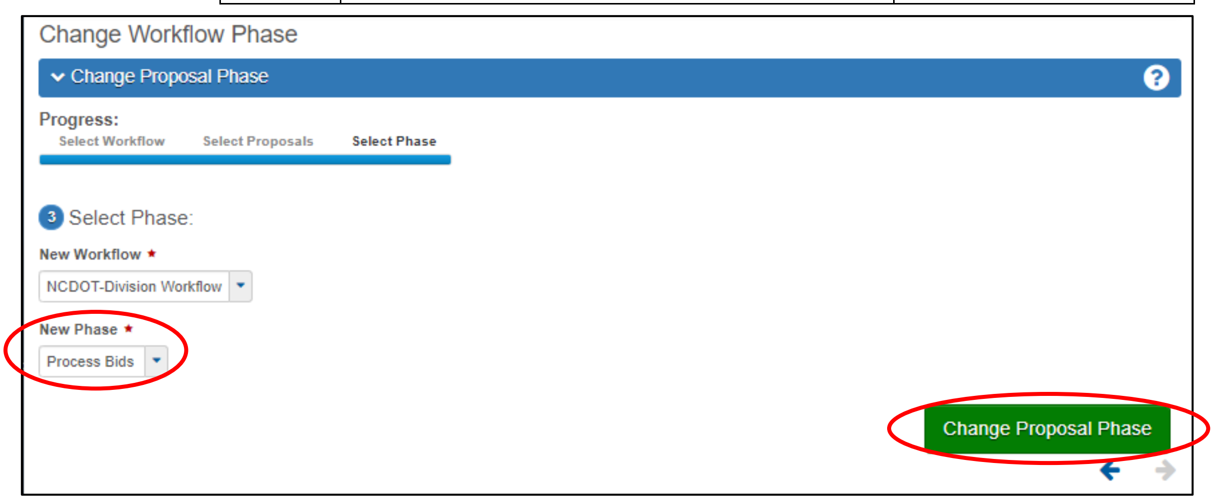
Changing the Workflow Phase

(continued)

9	Click the **Arrow** at the bottom of the page to go to the next page.	The next page will appear.



10	Click to the left of each proposal you wish to advertise to select the proposal. **NOTE:** If you wish to select all the proposals, click **ALL**.	Once selected, a green check mark will appear to the left of the proposals.
11	Click the Arrow at the bottom of the page to go to the next page.	The next page will appear.

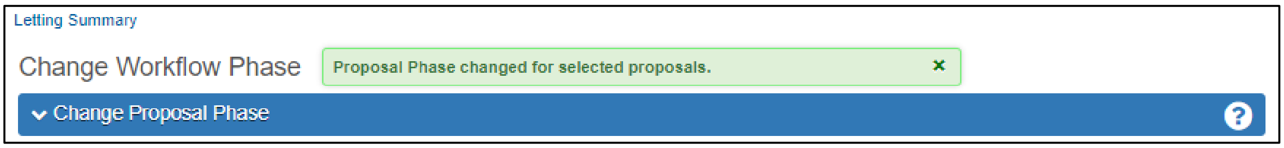


Continued on Following Page

Changing the Workflow Phase

(continued)

12	Select ***Process Bids*** from the drop-down list in the **NEW PHASE** field.	Your selection will appear in the **NEW PHASE** field.
13	Click the **CHANGE PROPOSAL PHASE** button.	The following message will appear above the **Header Bar**.



You will return to the first page of the **Change Workflow Phase** process.

Click **LETTING SUMMARY** at the top of the page to return to the **Letting Summary** page.

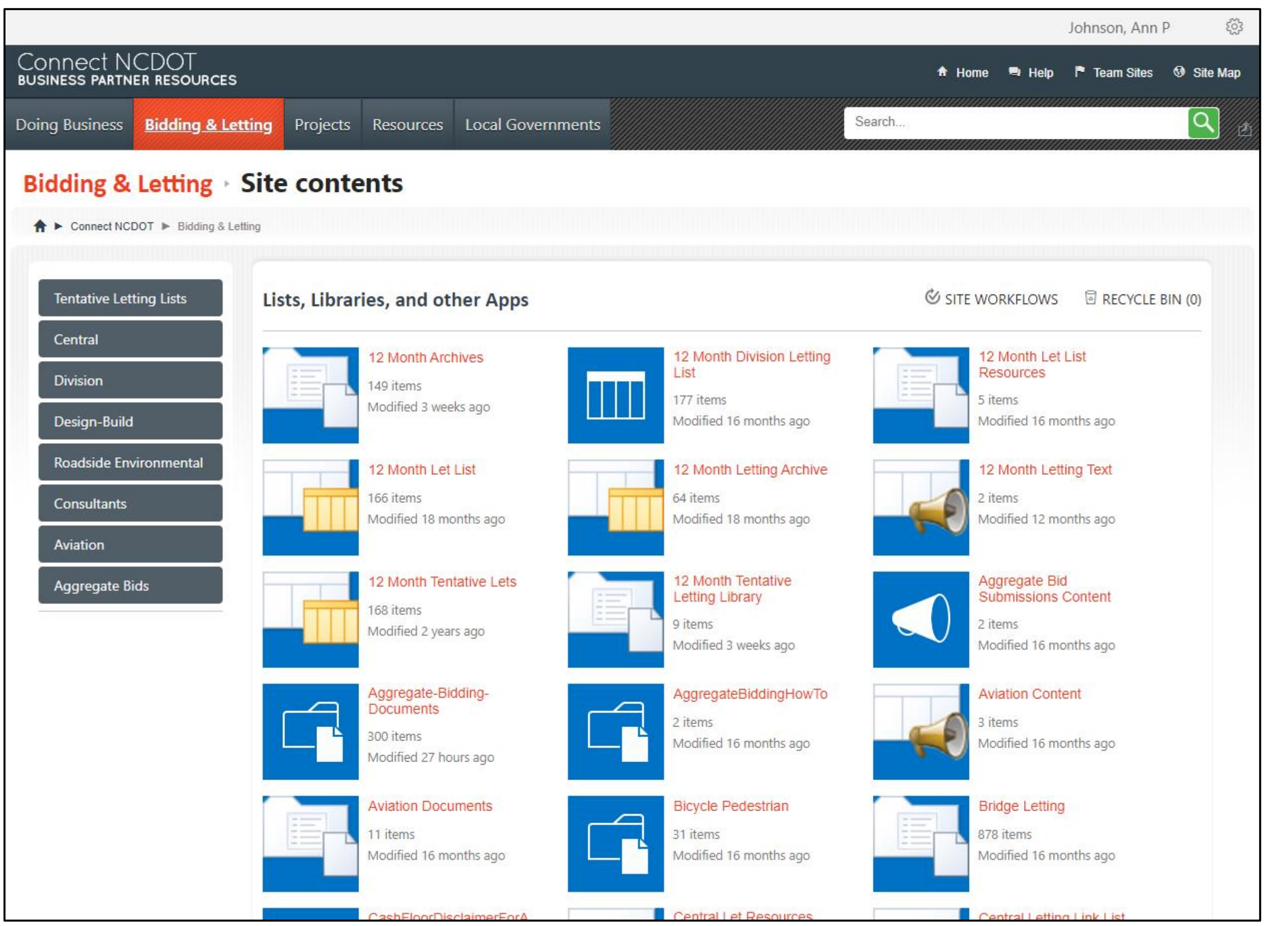
Uploading Bid Data Files to NCDOT.gov

This procedure populates the library of files that the Interested Parties/Authorized Bidders need to see for the proposals they are bidding on.

If a document set hasn't been created for the letting, you will need to create one.

To access the **Bidding and Letting** page:

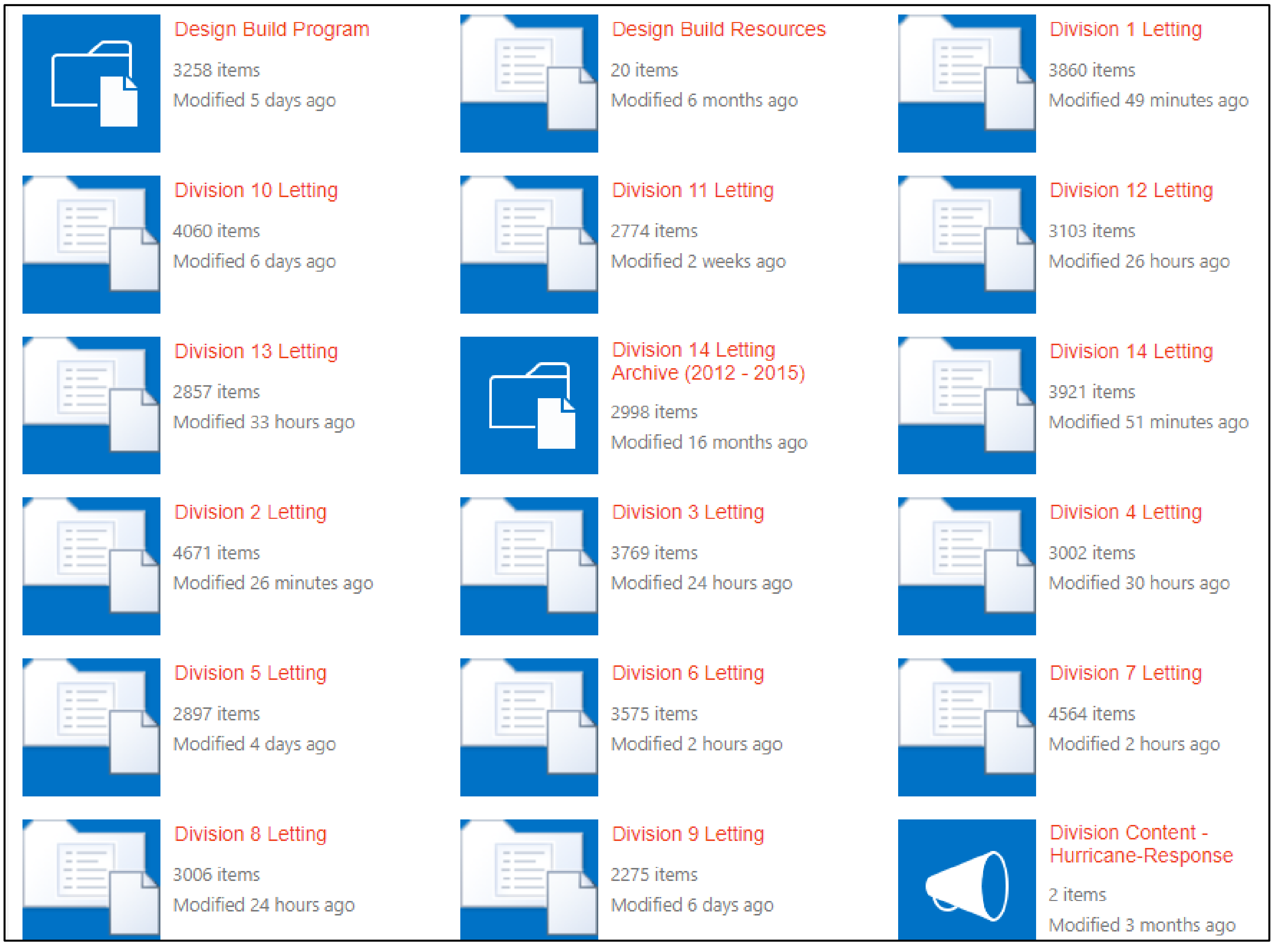
Step	Action	Result
1	In the address bar of your web browser, type HTTPS://INSIDE.NCDOT.GOV/STAGE/CONNECT/LETTING/_LAYOUTS/15/VIEWLSTS.ASPX and press Enter.	The following page will appear.



Continued on Following Page

Uploading Bid Data Files to NCDOT.gov

(continued)

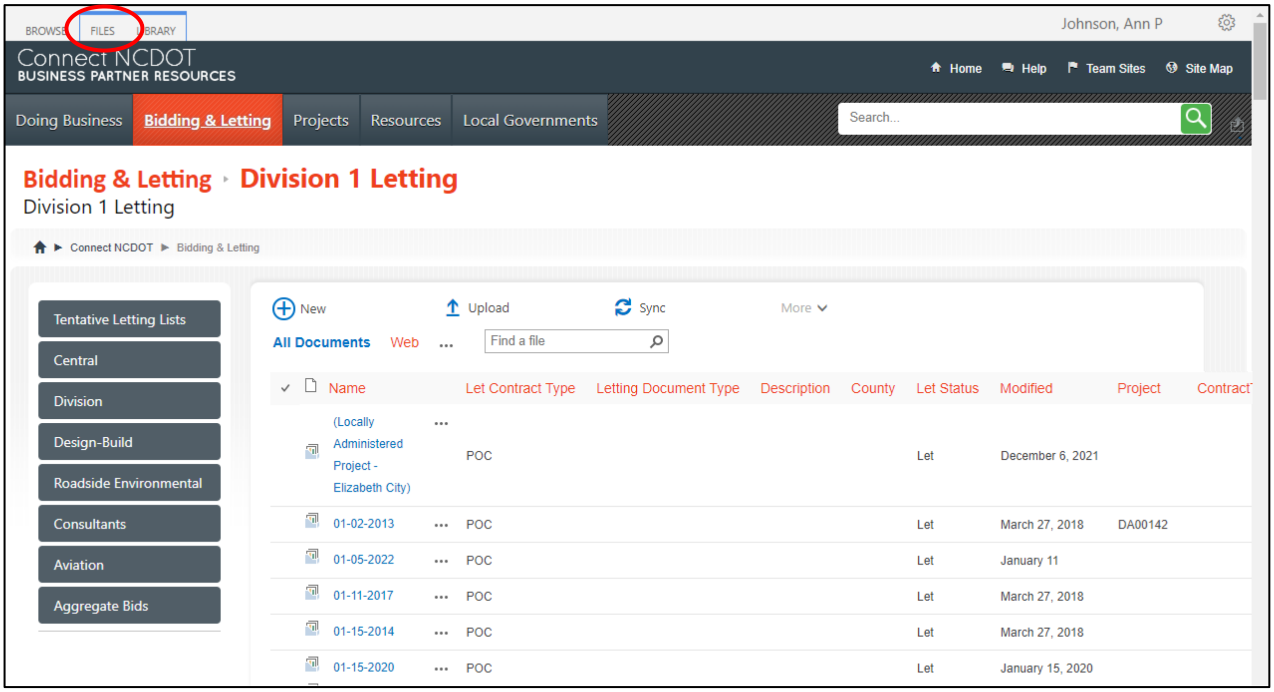


2	Click on **the letting folder for your Division**.	The list of lettings will appear.

Continued on Following Page

Uploading Bid Data Files to NCDOT.gov

(continued)



Creating a Letting Document Set

If you need to create a new document set for the letting, follow these steps, otherwise skip to **Step 15**.

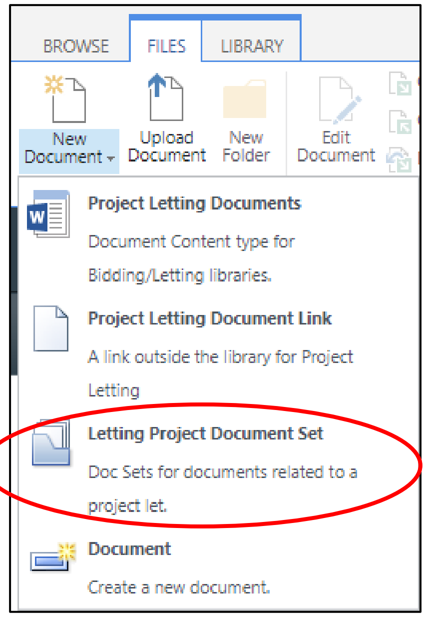
A new Document Set will need to be created for each new Letting.

3	In the top left corner of the window, click the **FILES** tab.	The SharePoint toolbar will expand.
4	Click the drop-down under the **NEW** button.	A drop-down menu will appear.

Continued on Following Page

Uploading Bid Data Files to NCDOT.gov

(continued)

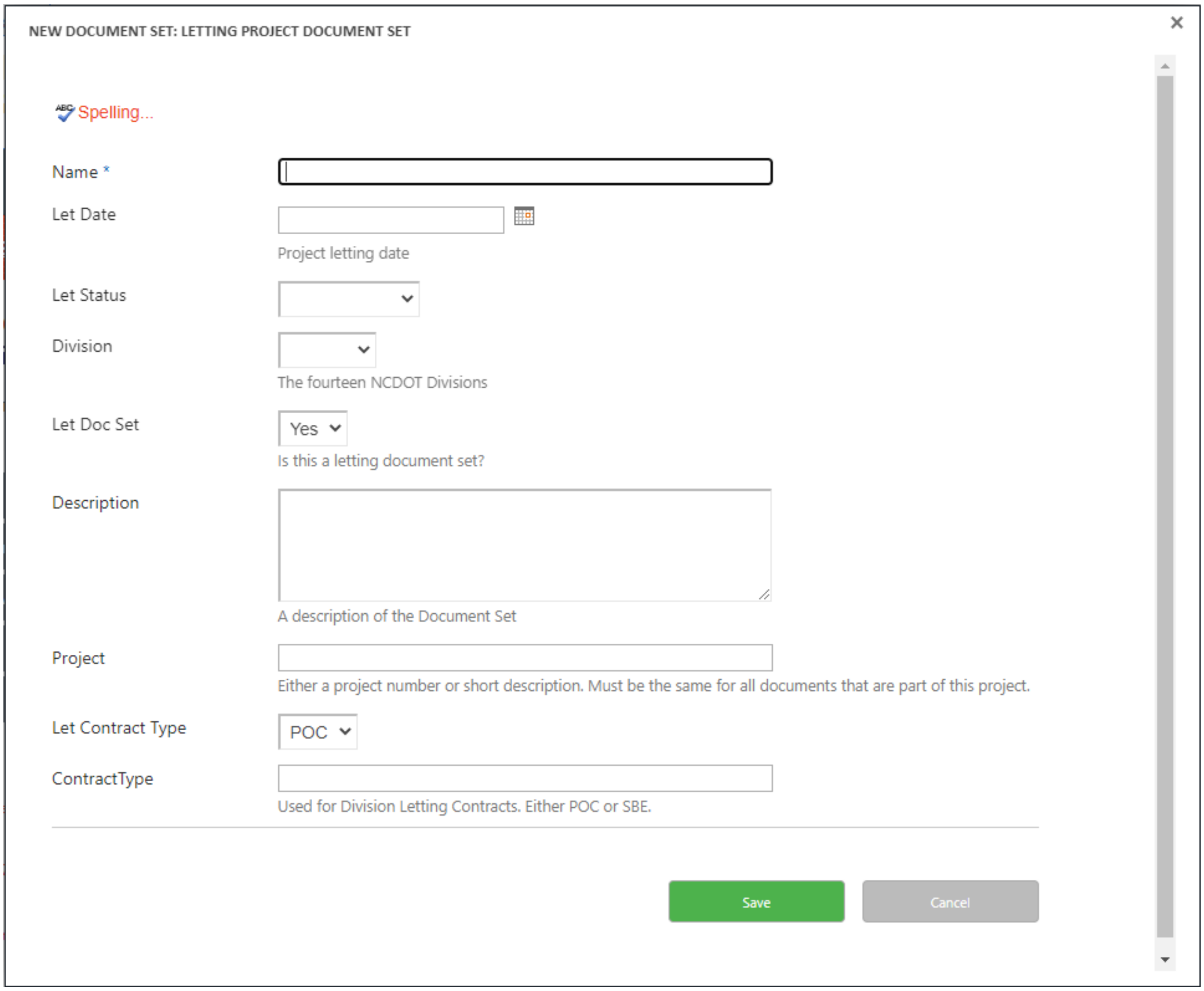


5	Select **LETTING PROJECT DOCUMENT SET** from the menu.	The following popup will appear.

Continued on Following Page

Uploading Bid Data Files to NCDOT.gov

(continued)



6	Type ***the Letting Date in MM-DD-YYYY format*** in the **Name** field.	N/A
7	Type ***the Letting Date*** in the **Let Date** field or select it from the calendar.	N/A
8	Select ***the status of the Letting*** from the drop-down in the **Let Status** field.	N/A
9	Select ***the Division*** from the drop-down in the **Division** field.	N/A

Continued on Following Page

Uploading Bid Data Files to NCDOT.gov

(continued)

10	If necessary, type ***a brief description*** in the **DESCRIPTION** field.	N/A
11	Type ***the Projects contained in the Letting or a brief description*** in the **PROJECT** field. 🗁**NOTE:** What you type in this field must be the same for all documents that are part of this project.	N/A
12	Select ***POC or SBE*** from the drop-down in the **LET CONTRACT TYPE** field.	N/A
13	Type ***the contract type*** in the **CONTRACTTYPE** field.	N/A
14	Click the **SAVE** button.	The new **Letting Document Set** will be created.

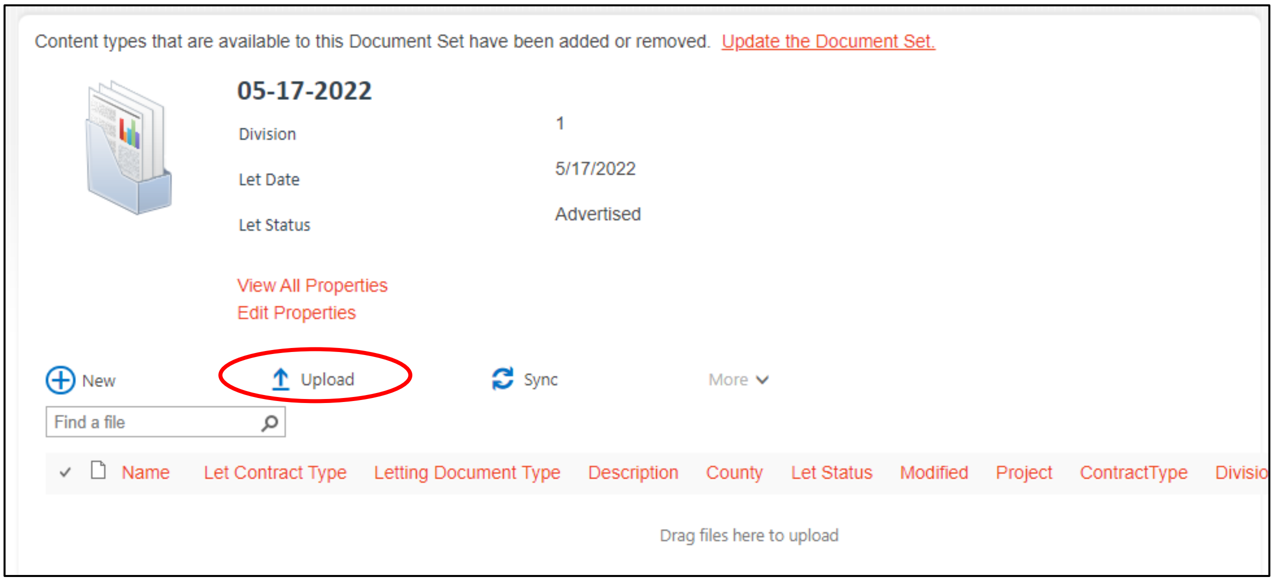
Continued on Following Page

Uploading Bid Data Files to NCDOT.gov

(continued)

Uploading Files

15	Click on ***the Letting Document Set***.	The document set for the selected **Letting** will appear.



16	Click UPLOAD.	The following dialog will appear.

Continued on Following Page

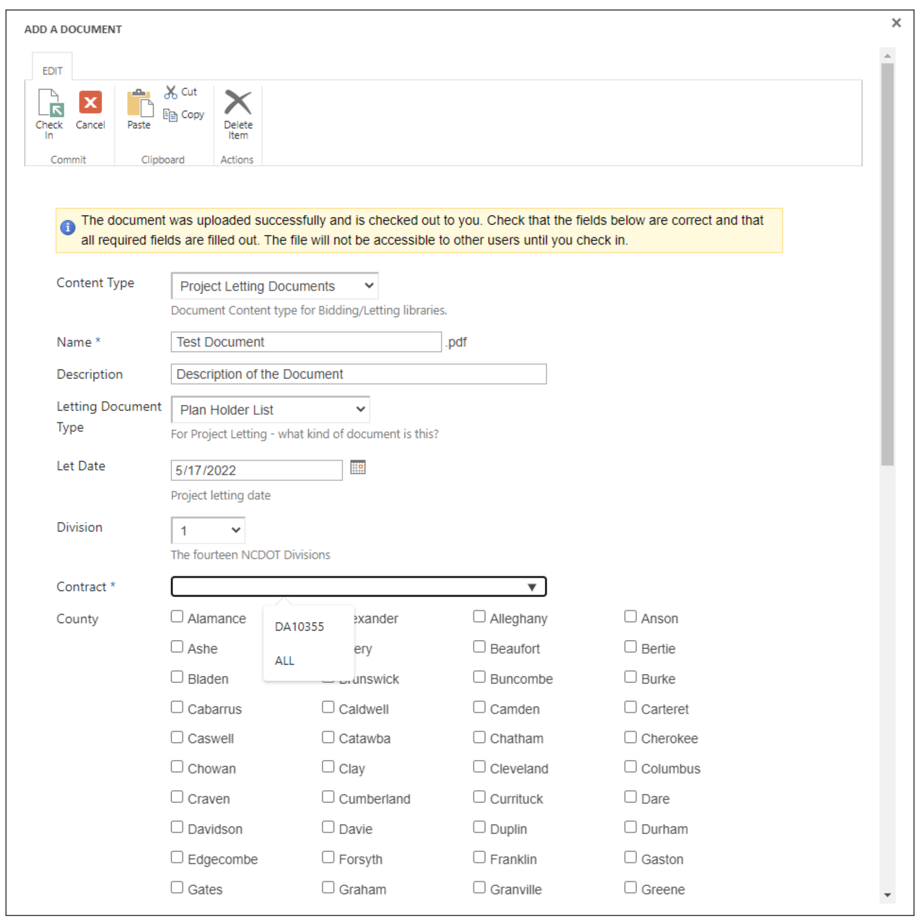
Uploading Bid Data Files to NCDOT.gov

(continued)

17	Click the **CHOOSE FILE** button.	The **Open** dialog will appear.
18	Select ***the file you wish to upload*** and click the **OPEN** button.	The name of the file will appear in the **CHOOSE A FILE** field.

The **DESTINATION FOLDER** field will default to ***the current Letting Folder***.

19	If you wish to type any ***comments about this file***, type them in the **VERSION COMMENTS** field.	N/A
20	Click the **OK** button.	The following popup will appear.



Continued on Following Page

Uploading Bid Data Files to NCDOT.gov

(continued)

21	Select ***Project Letting Documents, Project Letting Document Link, or Document*** from the drop-down list in the **CONTENT TYPE** field.	N/A

The name of the uploaded document will appear in the **NAME** field.

22	If needed, type ***a brief description of the file*** in the **Description** field.	N/A
23	Select ***the type of file*** from the drop-down list in the **LETTING DOCUMENT TYPE** field.	N/A

The Letting Date will default in the **LET DATE** field.

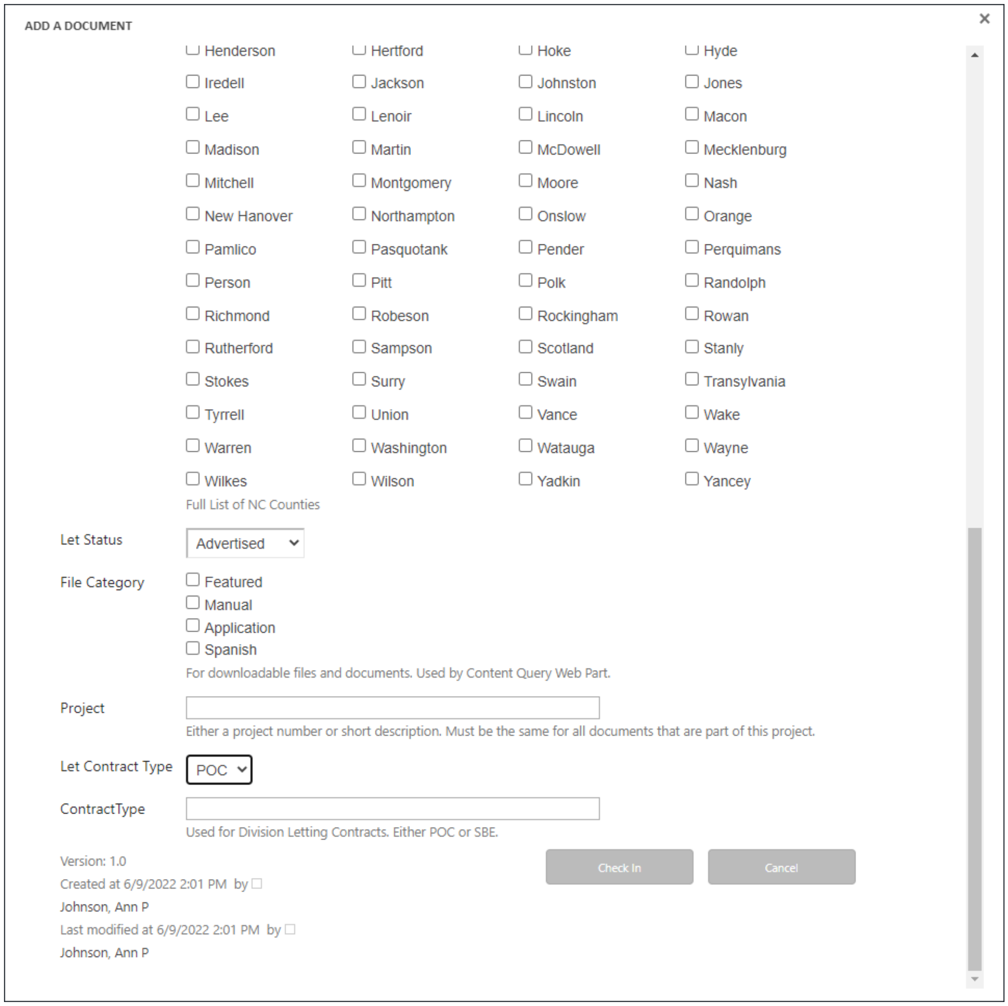
The Division will default in the **DIVISION** field.

24	From the drop-down in the **CONTRACT** field, select either ***ALL*** or a ***specific contract number***.	N/A
25	Click the check box beside each **COUNTY** that the file pertains to.	N/A

Continued on Following Page

Uploading Bid Data Files to NCDOT.gov

(continued)



The status of the letting will default in the **LET STATUS** field.

26	Click ***the applicable checkbox*** in the **FILE CATEGORY** section.	N/A
27	In the **PROJECT** field, type the project number or short description. 🗁**NOTE:** What you type in this field must be the same for all documents that are part of this project.	N/A
28	Select ***SBE*** or ***POC*** from the drop-down list in the **LET CONTRACT TYPE** field.	N/A

Continued on Following Page

Uploading Bid Data Files to NCDOT.gov

(continued)

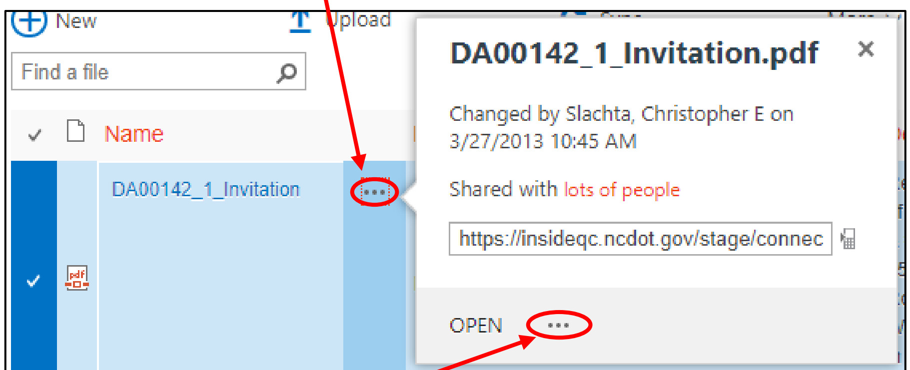
29	If applicable, type a brief description in the **CONTRACTTYPE** field.	N/A
30	Click the **CHECK IN** button,	Within a few seconds, the file will appear in the list. It will have a green asterisk ✲ next to it. This indicates that the file is new.

Editing Bid Data File Information

If you need to edit the information you provided about the file,

From the document set containing the file:

Step	Action	Result
1	Click on the 3 dots next to the name of the file.	The following dialog will appear.

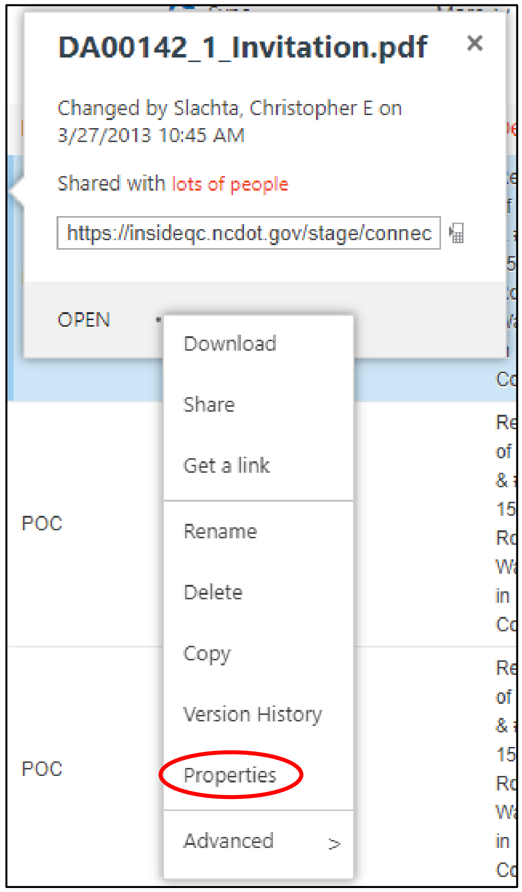


2	Click on the 3 dots next to the word **OPEN**.	The following dialog will appear.

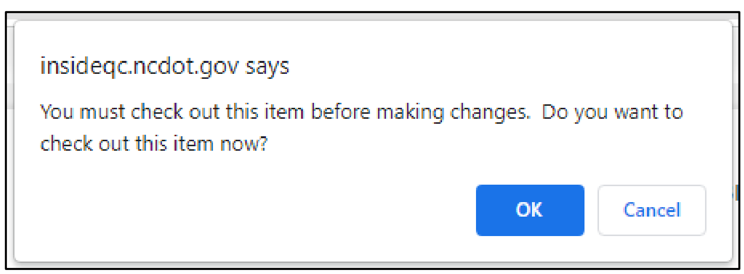
Continued on Following Page

Editing Bid Data File Information

(continued)



3	Click on **PROPERTIES**.	The following message will appear.

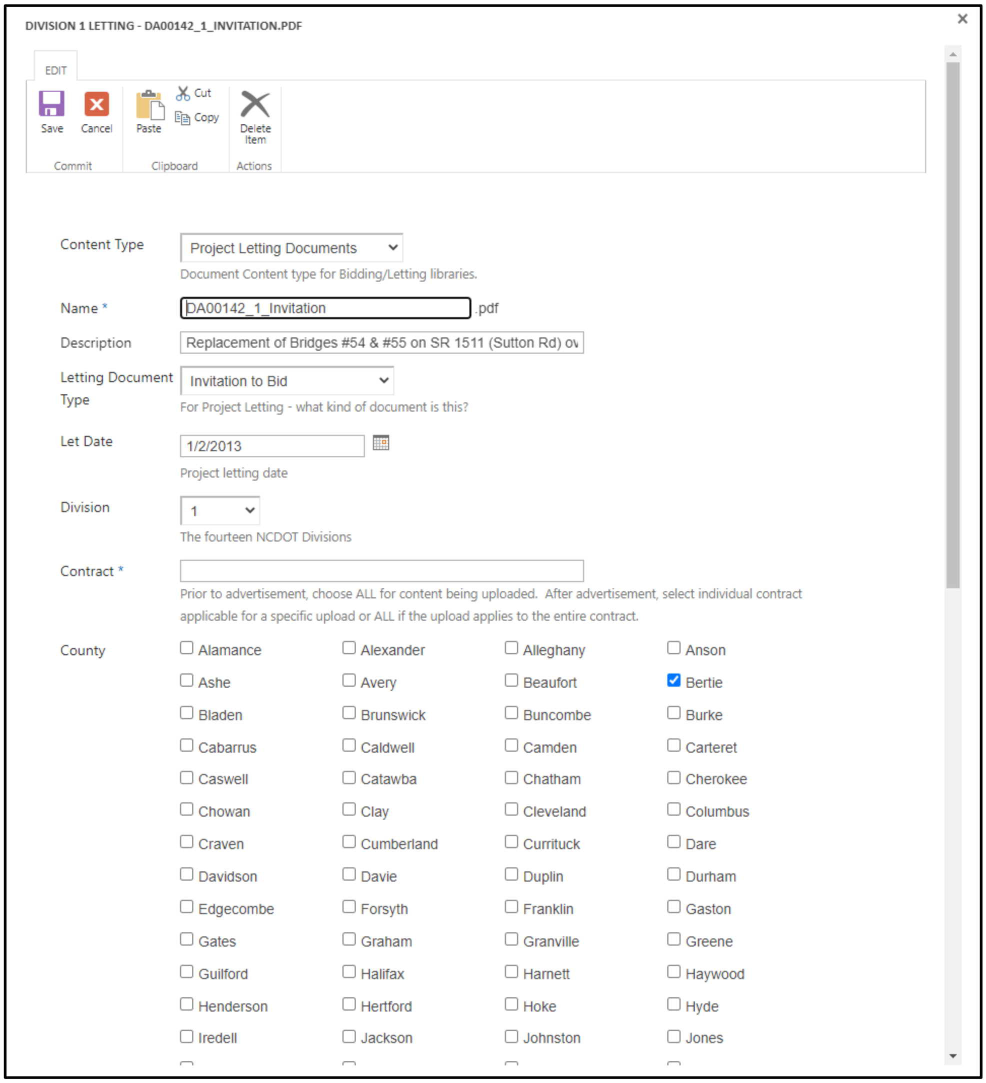


4	Click **OK**.	The dialog you populated when you uploaded the file will appear.

Continued on Following Page

Editing Bid Data File Information

(continued)



5	Make your edits and click the **SAVE** button.	You will return to the list. The file will now be marked with a green arrow.  This means that the file is checked out to you, and you must check it back in.

Continued on Following Page

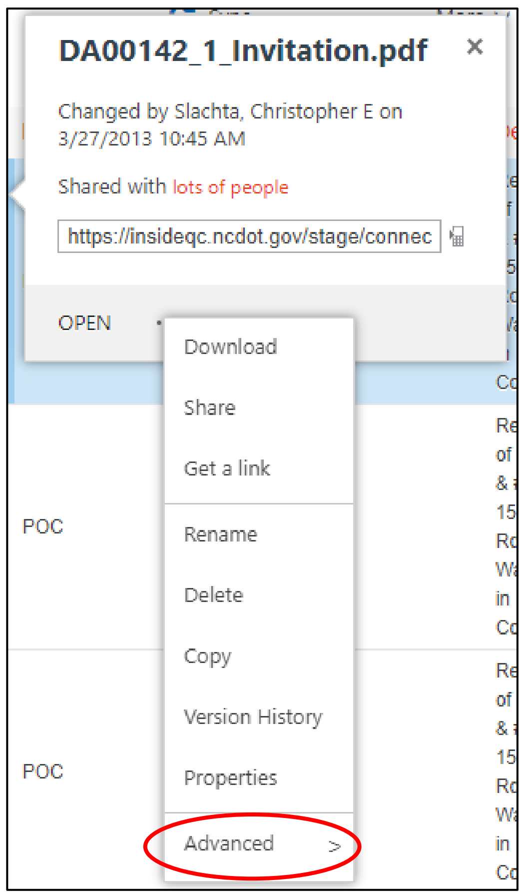
Editing Bid Data File Information

(continued)

Checking in a File

6	To check the file back in, click on the three dots next to the name of the file.	The following dialog will appear.

7	Click on the 3 dots next to the word **OPEN**.	The following dialog will appear.

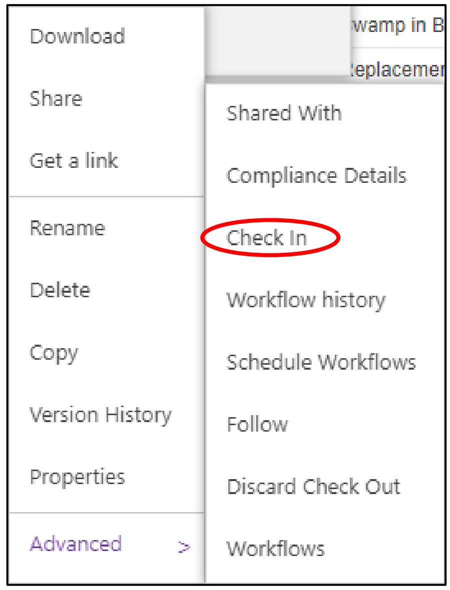


Continued on Following Page

Editing Bid Data File Information

(continued)

8	Click on **ADVANCED**.	The following dialog will appear.



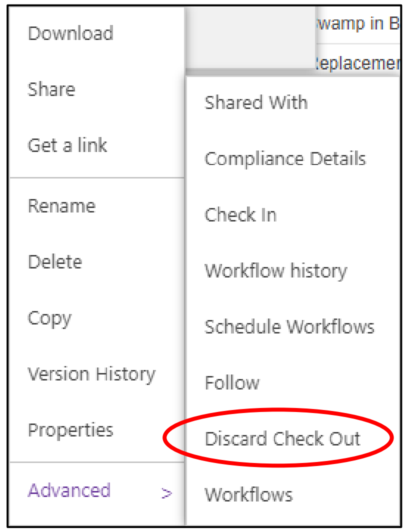
9	Click on **CHECK IN**.	The file is checked in and your changes are saved.

Continued on Following Page

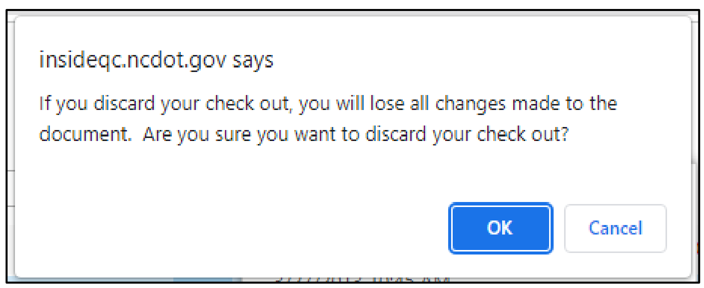
Editing Bid Data File Information

(continued)

If you have checked out the wrong file, don't make any changes, or don't want to save your changes, you may select, **DISCARD CHECK OUT** from the menu instead.



The following error message will appear.



Click **OK** and your checkout will be discarded.

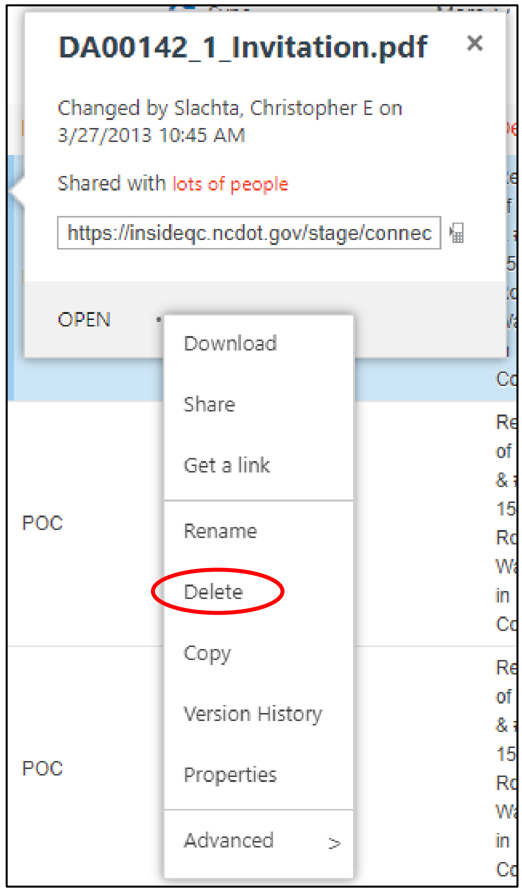
Continued on Following Page

Editing Bid Data File Information

(continued)

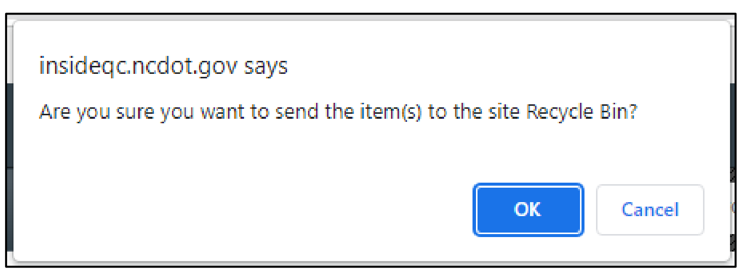
Deleting a File

If you upload a file by mistake or if you want to delete the file in order to replace it with a different version, you can delete it.



Select **DELETE** from the menu that appears when you click the three dots next to the word **OPEN**.

The following error message will appear.



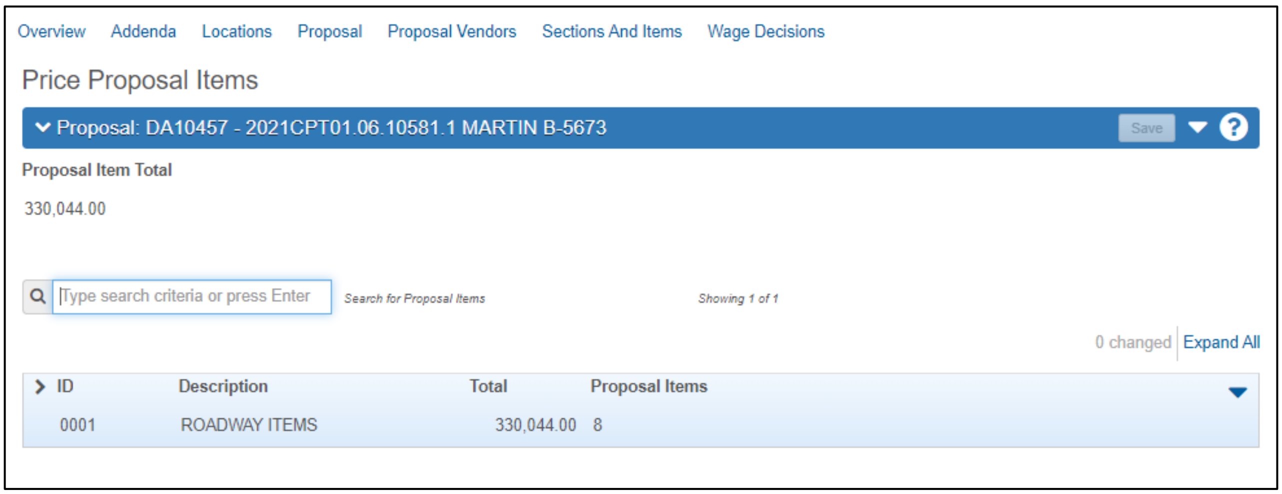
Click **OK** and the file will be deleted.

Adjusting Estimate Prices After Advertisement & Before Letting

Follow the procedure for **Finding a Proposal** on **Page 4-1**.

From the ***Proposal Summary*** page:

Step	Action	Result
1	Click the ***Item Pricing*** Quick Link.	The **Price Proposal Items** window will appear.



(*Price Proposal Items Page*)

2	Expand the section containing the item by clicking the arrow.	N/A
3	Navigate to the item and change the amount in the **PRICE** field.	N/A
4	Press the Tab key to move the cursor from the edited field.	The **SAVE** button will become enabled.
5	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Chapter 8 Bid Preparation

Creating the EBSX File for One Proposal

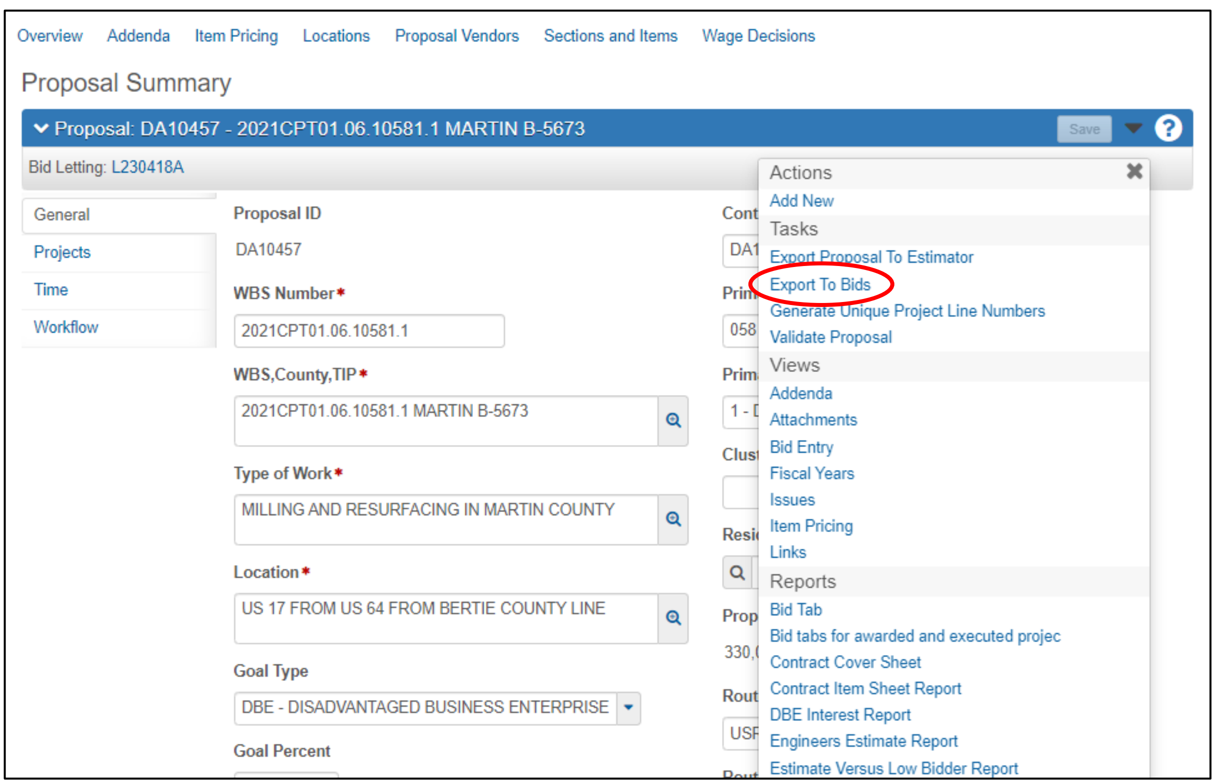
The EBSX file is used by contractors to enter their bids using the **Project Bids Bid** application. It allows them to electronically submit bids and DBE/MBE/WBE information.

Division personnel also use the EBSX file to enter paper bids into the **Project Bids Entry** application.

Beginning with Advertisements on or after November 1, 2024, EBSX files will need to be posted to the Connect letting site like CSDU posts their EBSX files with each letting. You will still load them to Bid Express. This gives bidding contractors one method for downloading bid files for all NCDOT lettings. It also allows us to support bidding contractors more quickly on Division lettings.

Follow the procedure for **Finding a Proposal** on **Page 4-1**.

From the ***Proposal Summary*** page:



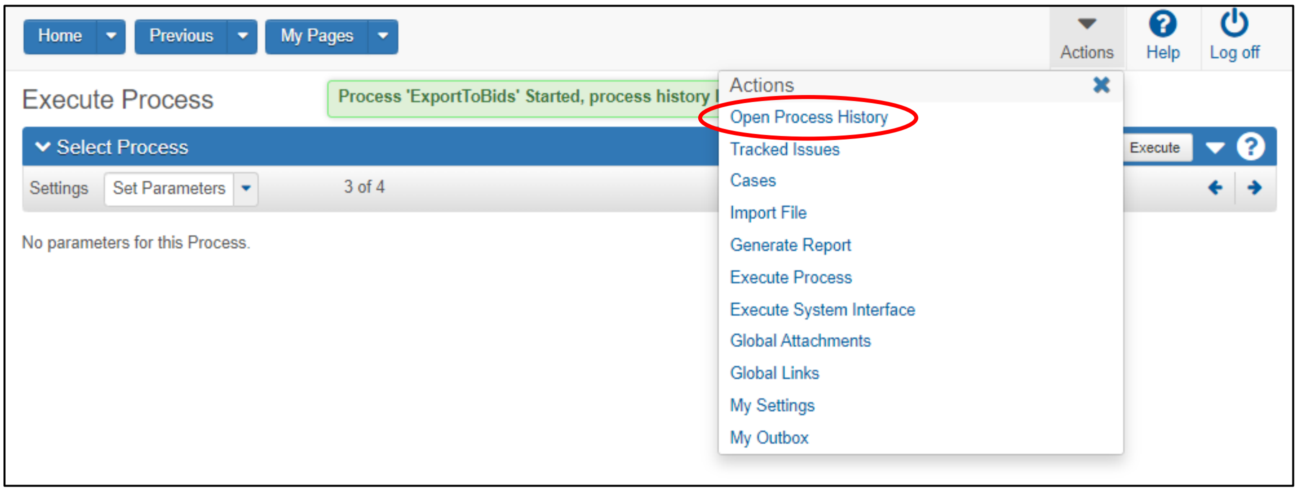
Continued on Following Page

Creating the EBSX File for One Proposal

(continued)

Step	Action	Result
1	From the drop-down arrow at the right side of the **Header Bar** select ***Export to Bids***.	The **Execute Process** page will appear.
2	Click the **EXECUTE** button.	This will launch the process.

Now you'll need to go to the **Process History** page to see if the process was successful.



Checking the Status of the EBSX File

Step	Action	Result
3	From the **ACTIONS** menu at the top of the window, select ***Open Process History***.	The **Process History Overview** page will appear.
4	Locate the process you have just executed. 🗁**NOTE:** Processes will be displayed with the most recent at the top of the page. Currently running processes will appear at the bottom until they have finished running.	

Continued on Following Page

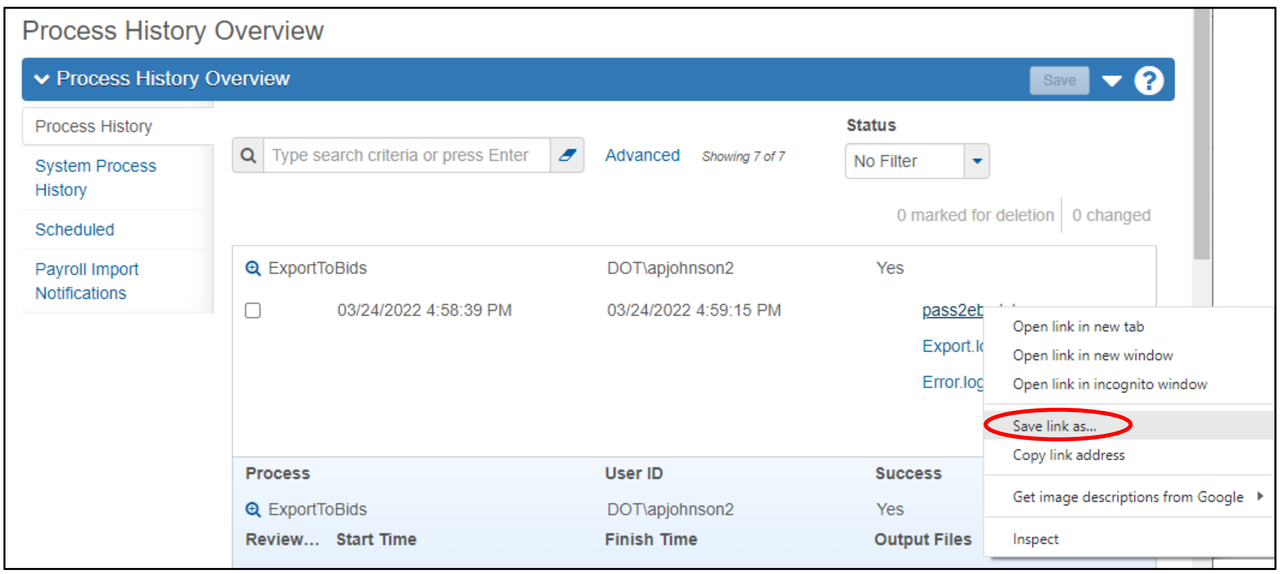
Creating the EBSX File for One Proposal

(continued)

There are 3 files that will be generated. These are:

Pass2ebs.txt	This is the file needed to generate the EBSX file.
Export.log	The only purpose of this file is to let you know if the export has completed successfully.
Error.log	This file will list any errors found during the export process.

🗁**NOTE:** The **Export.log** and **Error.log** files are for information only.

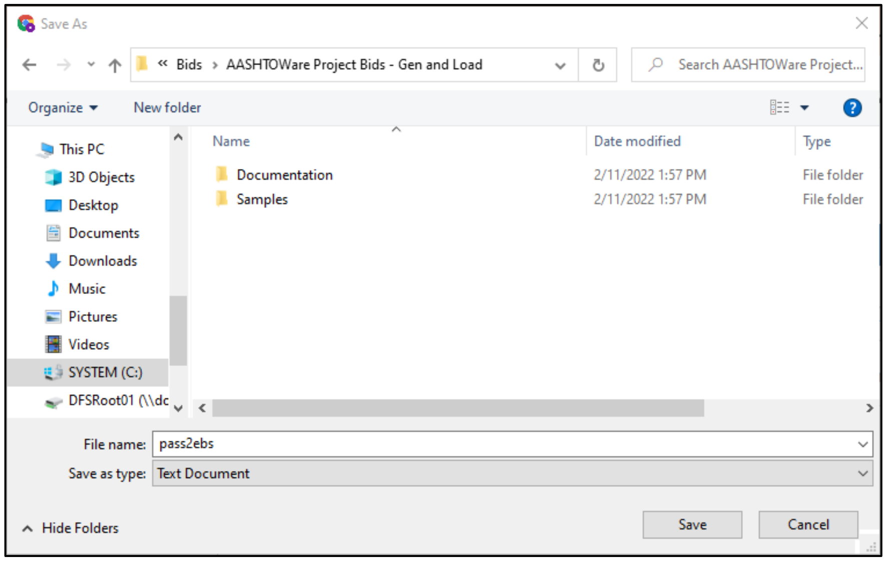


5	In the **Output Files** section, right-click on the **pass2ebs.txt** file.	A right-click menu will appear.
6	Select ***Save link as…*** from the drop-down menu.	The **Save As** dialog will appear.

Continued on Following Page

Creating the EBSX File for One Proposal

(continued)



7	In the **Save As** dialog, navigate to **C:\Bids\AASHTOWare Project Bids – Gen and Load**. 🗁**NOTE:** If you have **Project Bid Entry** installed on our computer, you will have this directory by default.	N/A
8	Click the **SAVE** button. 🗁**NOTE:** Do not change the file name.	The **pass2ebs.txt** file will be saved to your **C:\Bids\AASHTOWare Project Bids – Gen and Load** directory.

If the **C:\Bids\AASHTOWare Project Bids – Gen and Load** directory already contains a Pass2ebs.txt file, either delete it or overwrite it.

When you are finished working with the files on the **Process History Overview** page, you can delete them by following the procedure for **Deleting a Process** on **Page 13-1**.

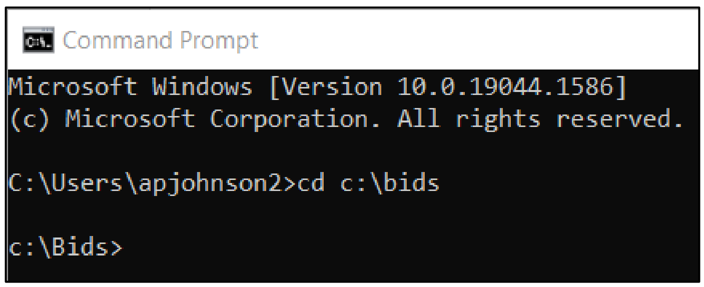
Continued on Following Page

Creating the EBSX File for One Proposal

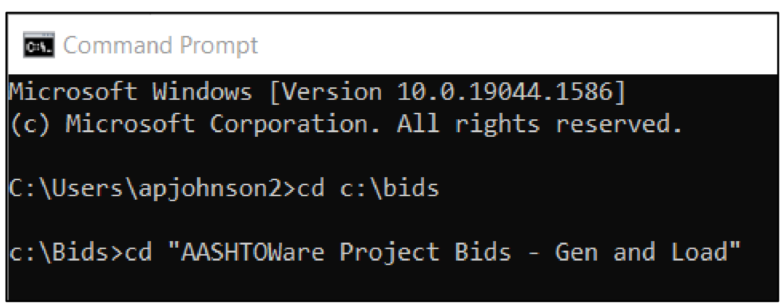
(continued)

Command Prompt

9	At this point you will open the **command prompt** window. 🗁**NOTE:** If it is not listed in a menu or a shortcut, type command in the **Windows search box** in your **taskbar**. It should appear first.	The **Command Prompt** window will appear.
10	Type **cd c:\bids** and press the [Enter] key.	You've changed the current directory to **c:\Bids**.



11	Type **cd a** and press [Tab]. **(Not [Enter])**	The first directory beginning with A will be displayed
12	Continue to press [Tab] until the **AASHTOWare Project Bids – Gen and Load** directory is displayed in the command prompt.	



Continued on Following Page

Creating the EBSX File for One Proposal

(continued)

13	Press Enter. The directory will change to **c:\Bids\AASHTOWare Project Bids – Gen and Load.**	You've changed the current directory to **c:\Bids\AASHTOWare Project Bids – Gen and Load**.
14	Type **gen** and press Enter.	The **generate** process will run.

```
Command Prompt

c:\Bids\AASHTOWare Project Bids - Gen and Load>gen
Copyright (c) 2021 by AASHTO. All Rights Reserved.
1 Letting(s) processed.
1 Contract(s) processed.
The file DA10357.ebsx is current.

c:\Bids\AASHTOWare Project Bids - Gen and Load>
```

The file created by this process will have the following format:

DE00268.EBSX

Proposal Number

15	Close the **Command Prompt** window.	You have successfully created an ***.EBSX** file.

Creating the EBSX File for Multiple Proposals

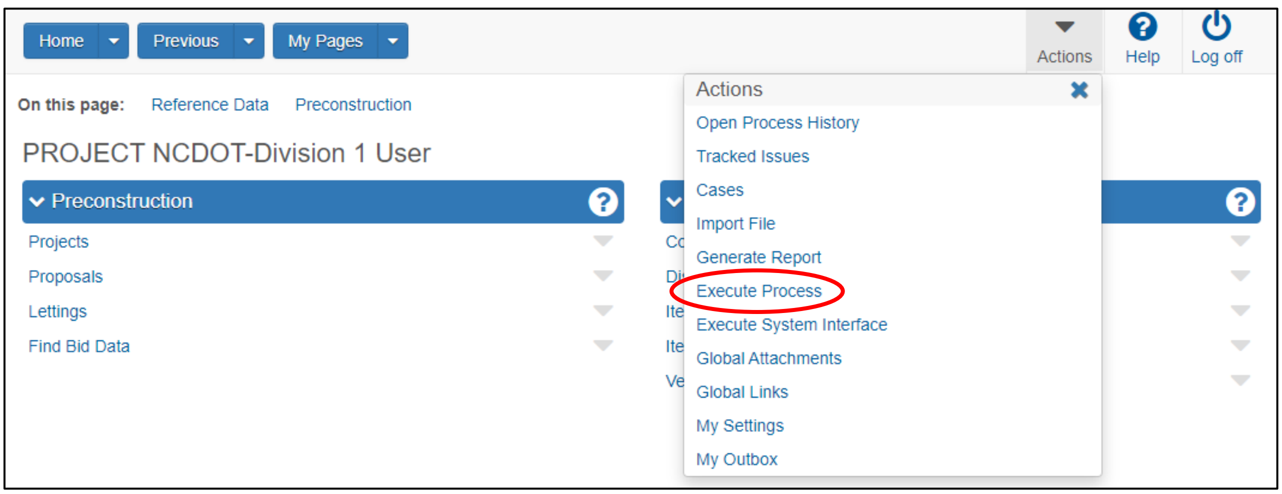
The EBSX file is used by contractors to enter their bids using the **Project Bids Bid** application. It allows them to electronically submit bids and DBE/MBE/WBE information.

Division personnel also use the EBSX file to enter paper bids into the **Project Bids Entry** application.

🗁**NOTE:** Use this procedure if you are selecting multiple proposals not in the same letting**.**

Beginning with Advertisements on or after November 1, 2024, EBSX files will need to be posted to the Connect letting site like CSDU posts their EBSX files with each letting. You will still load them to Bid Express. This gives bidding contractors one method for downloading bid files for all NCDOT lettings. It also allows us to support bidding contractors more quickly on Division lettings.

From the ***AASHTOWare Project Dashboard***:



(*AASHTOWare Project Dashboard – Actions Menu*)

Step	Action	Result
1	From the **ACTIONS** menu at the top of the window, select ***Execute Process***.	The **Select Process** page will appear.
2	Click **EXPORT TO BIDS**.	The **Execute Process – Export to Bids** page will appear.

Continued on Following Page

Creating the EBSX File for Multiple Proposals

(continued)

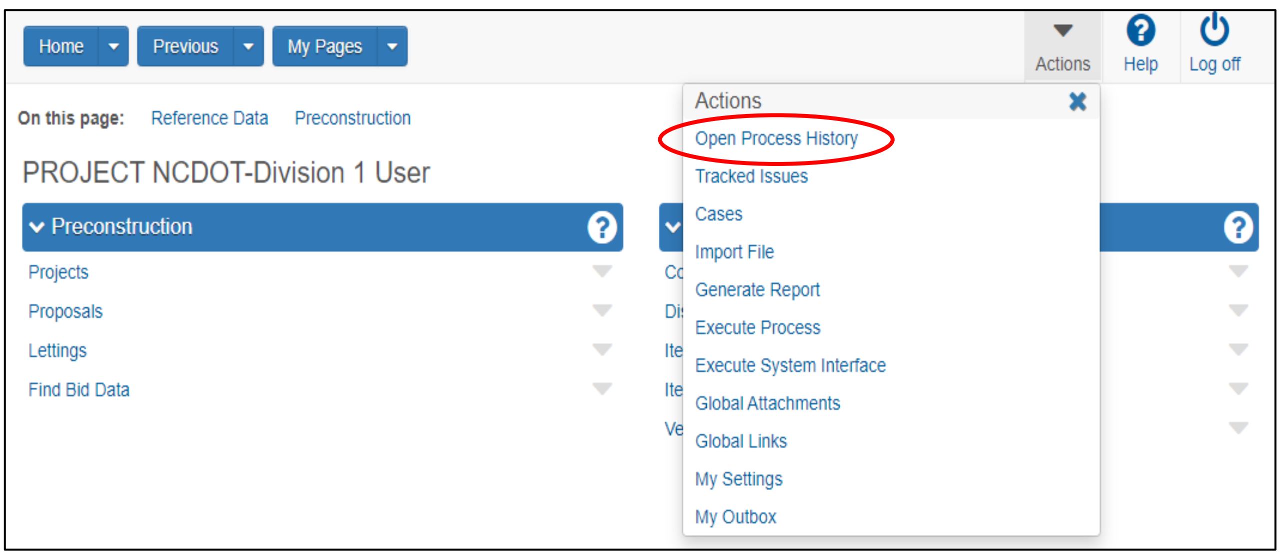
3	In the **SEARCH** box, type ***the proposal number or any other searchable information***. See **Proposal Search Criteria** on **Page 4-1**.	N/A
4	When the proposals appear, select them.	The proposals will be marked with a green check mark.

Repeat **Steps 3 & 4** for each proposal with different search criteria you wish to create the EBSX file for.

🗁**NOTE:** Proposals MUST be linked to a letting.

5	Click the **EXECUTE** button.	This will launch the process.

Now you'll need to go to the **Process History** page to see if the process was successful.



Checking the Status of the EBSX File

6	From the **ACTIONS** menu at the top of the window, select ***Open Process History***.	The **Process History Overview** page will appear.

Continued on Following Page

Creating the EBSX File for Multiple Proposals

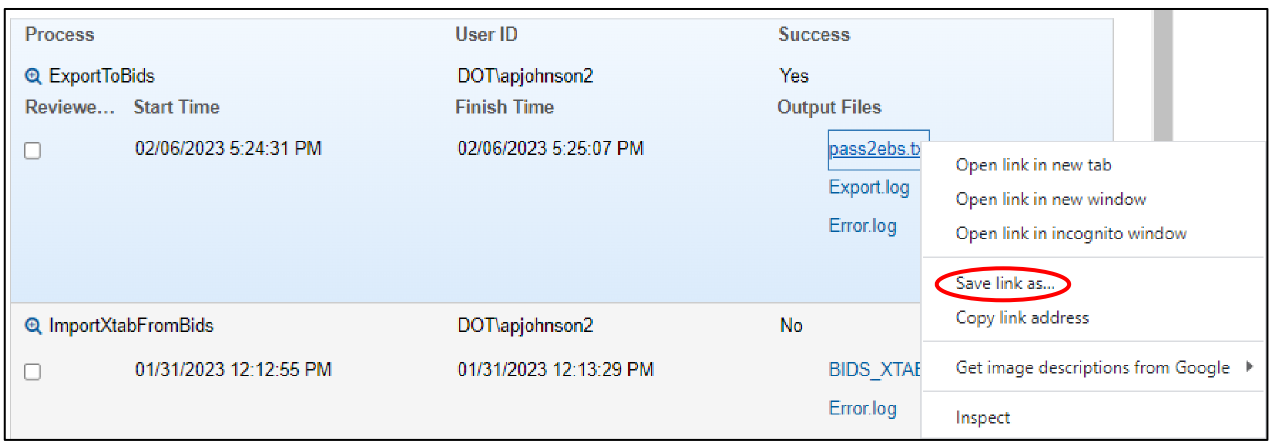
(continued)

7	Locate the process you have just executed. 🗁**NOTE:** Processes will be displayed with the most recent at the top of the page. Currently running processes will appear at the bottom until they have finished running.

There are 3 files that will be generated. These are:

Pass2ebs.txt	This is the file needed to generate the EBSX file.
Export.log	The only purpose of this file is to let you know if the export has completed successfully.
Error.log	This file will list any errors found during the export process.

🗁**NOTE:** The **Export.log** and **Error.log** files are for information only.

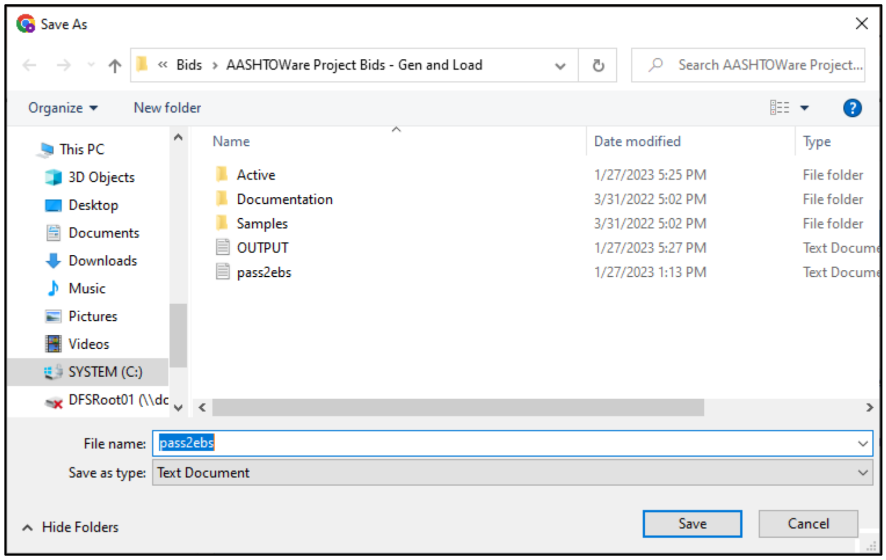


8	In the **OUTPUT FILES** section, right-click on the **pass2ebs.txt** file.	A right-click menu will appear.
9	Select ***Save link as…*** from the drop-down menu.	The **Save As** dialog will appear.

Continued on Following Page

Creating the EBSX File for Multiple Proposals

(continued)



10	In the **Save As** dialog, navigate to **C:\Bids\AASHTOWare Project Bids – Gen and Load**. 🗁**NOTE:** If you have **Project Bid Entry** installed on our computer, you will have this directory by default.	N/A
11	Click the **SAVE** button. 🗁**NOTE:** Do not change the file name.	The **pass2ebs.txt** file will be saved to your **C:\Bids\AASHTO Ware Project Bids – Gen and Load** directory.

If the **C:\Bids\AASHTOWare Project Bids – Gen and Load** directory already contains a Pass2ebs.txt file, either delete it or overwrite it.

When you are finished working with the files on the **Process History Overview** page, you can delete them by following the procedure for **Deleting a Process** on **Page 13-1**.

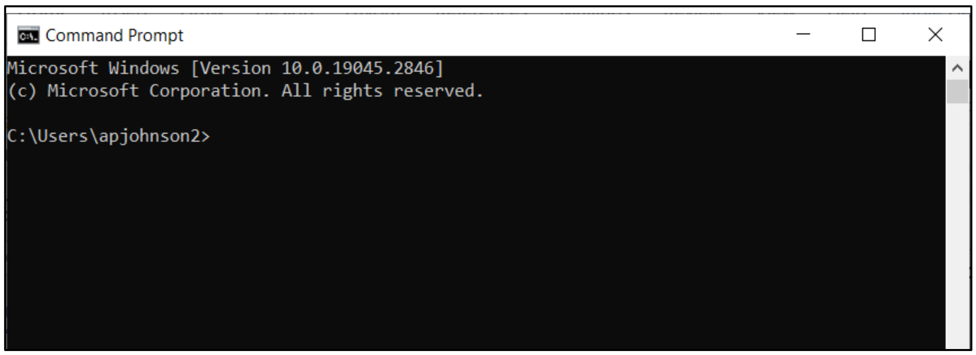
Continued on Following Page

Creating the EBSX File for Multiple Proposals

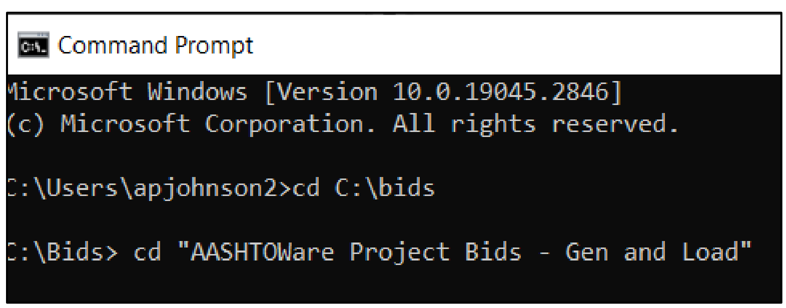
(continued)

Command Prompt

12	At this point you will open the **command prompt** window. 🗁**NOTE:** If it is not listed in a menu or a shortcut, type command in the **Windows search box** in your **taskbar**. It should appear first.	The **Command Prompt** window will appear.



13	Type **cd c:\bids** and press the Enter key.	You've changed the current directory to **c:\Bids**.
14	Type **cd a** and press Tab. **(Not Enter)**	The first directory beginning with A will be displayed
15	Continue to press Tab until the **AASHTOWare Project Bids – Gen and Load** directory is displayed in the command prompt.	

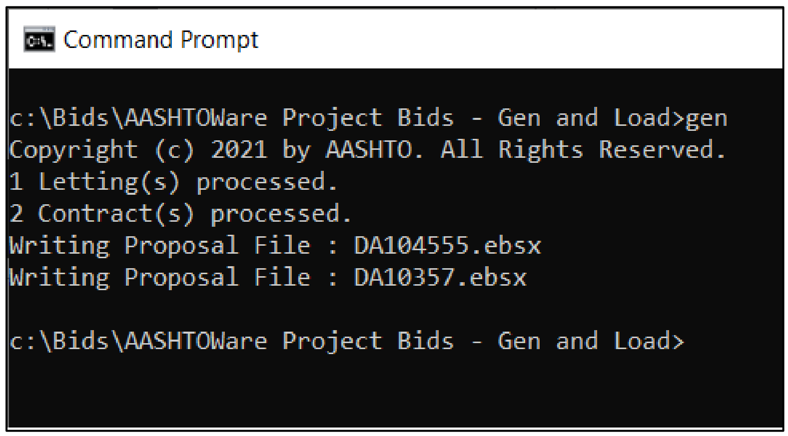


Continued on Following Page

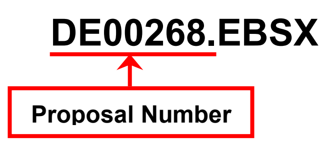
Creating the EBSX File for Multiple Proposals

(continued)

16	Press Enter. The directory will change to **c:\Bids\AASHTOWare Project Bids – Gen and Load.**	You've changed the current directory to **c:\Bids\AASHTOWare Project Bids – Gen and Load**.
17	Type **gen** and press Enter.	The **generate** process will run.



Each file created by this process will have the following format:



A file will be generated for each proposal.

18	Close the **Command Prompt** window.	You have successfully created ***.EBSX** Files.

Creating the EBSX File for the Letting

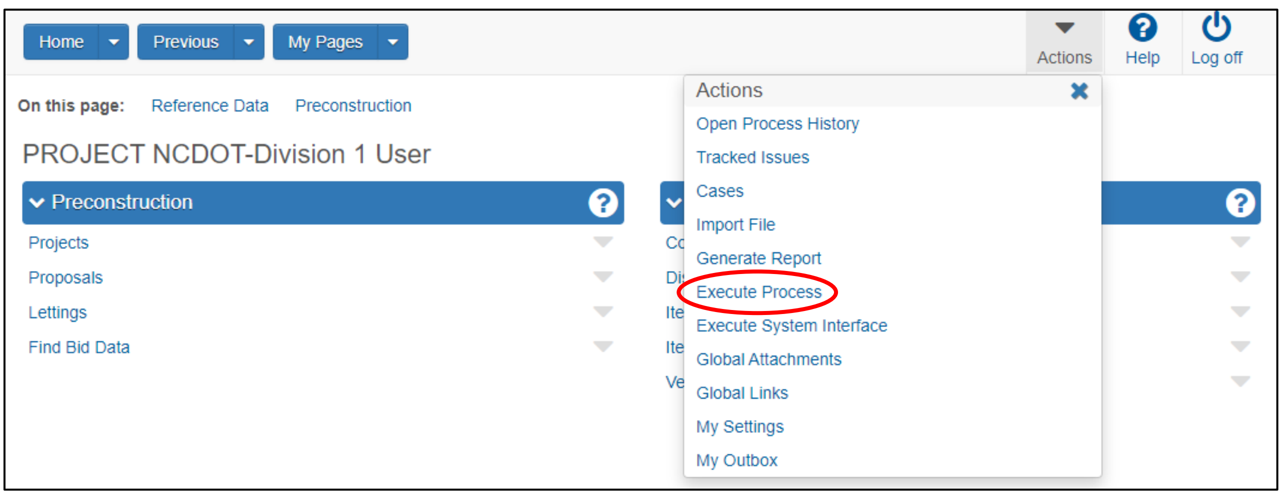
The EBSX file is used by contractors to enter their bids using the **Project Bids Bid** application. It allows them to electronically submit bids and DBE/MBE/WBE information.

Division personnel also use the EBSX file to enter paper bids into the **Project Bids Entry** application.

🗁**NOTE:** Use this procedure if you are selecting all proposals or a subset of the proposals in the same letting**.**

Beginning with Advertisements on or after November 1, 2024, EBSX files will need to be posted to the Connect letting site like CSDU posts their EBSX files with each letting. You will still load them to Bid Express. This gives bidding contractors one method for downloading bid files for all NCDOT lettings. It also allows us to support bidding contractors more quickly on Division lettings.

From the ***AASHTOWare Project Dashboard***:



(*AASHTOWare Project Dashboard – Actions Menu*)

Step	Action	Result
1	From the **ACTIONS** menu at the top of the window, select ***Execute Process***.	The **Select Process** page will appear.
2	Click **EXPORT TO BIDS**.	The **Execute Process – Export to Bids** page will appear.

Continued on Following Page

Creating the EBSX File for the Letting

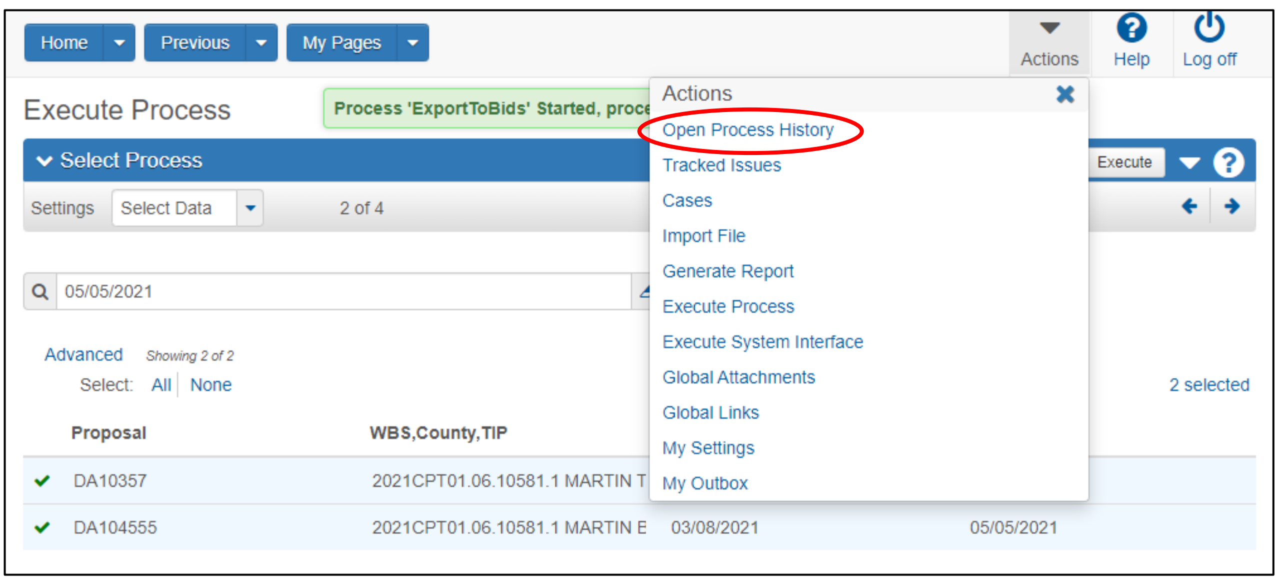
(continued)

3	In the **SEARCH** box, type ***the letting date*** or the ***advertisement date*** in **mm/dd/yyyy** format.	N/A

🗁**NOTE:** If you choose to search by **advertisement date**, you will see the proposals you are advertising that day only. This will make selecting them easier as the proposal list gets longer and longer.

4	When the proposals in the letting appear, select them.	The proposals will be marked with a green check mark.
5	Click the **EXECUTE** button.	This will launch the process.

Now you'll need to go to the **Process History** page to see if the process was successful.



Continued on Following Page

Creating the EBSX File for the Letting

(continued)

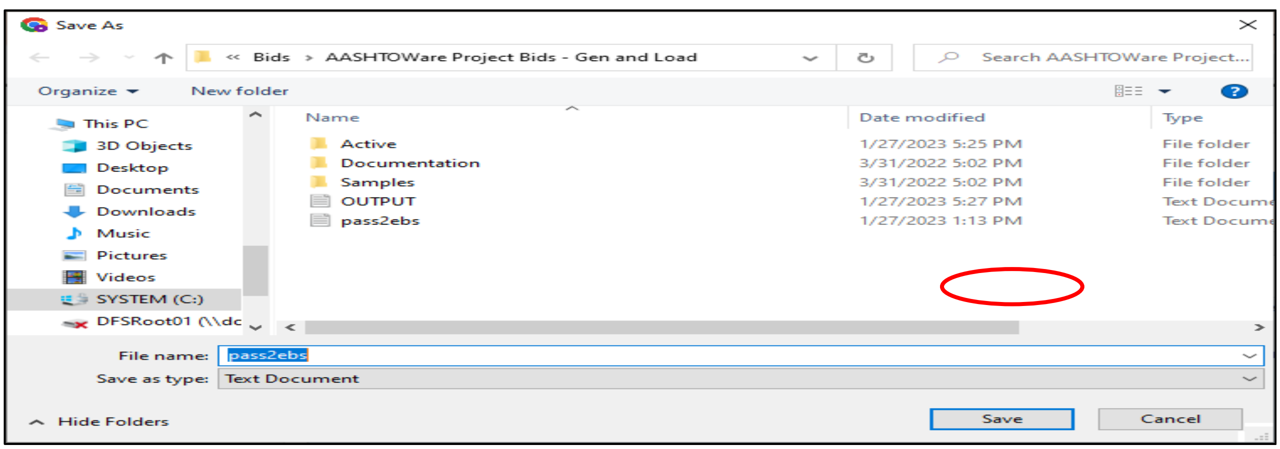
Checking the Status of the EBSX File

6	From the **ACTIONS** menu at the top of the window, select ***Open Process History***.	The **Process History Overview** page will appear.
7	Locate the process you have just executed. 🗁**NOTE:** Processes will be displayed with the most recent at the top of the page. Currently running processes will appear at the bottom until they have finished running.	

There are 3 files that will be generated. These are:

Pass2ebs.txt	This is the file needed to generate the EBSX file.
Export.log	The only purpose of this file is to let you know if the export has completed successfully.
Error.log	This file will list any errors found during the export process.

🗁**NOTE:** The **Export.log** and **Error.log** files are for information only.

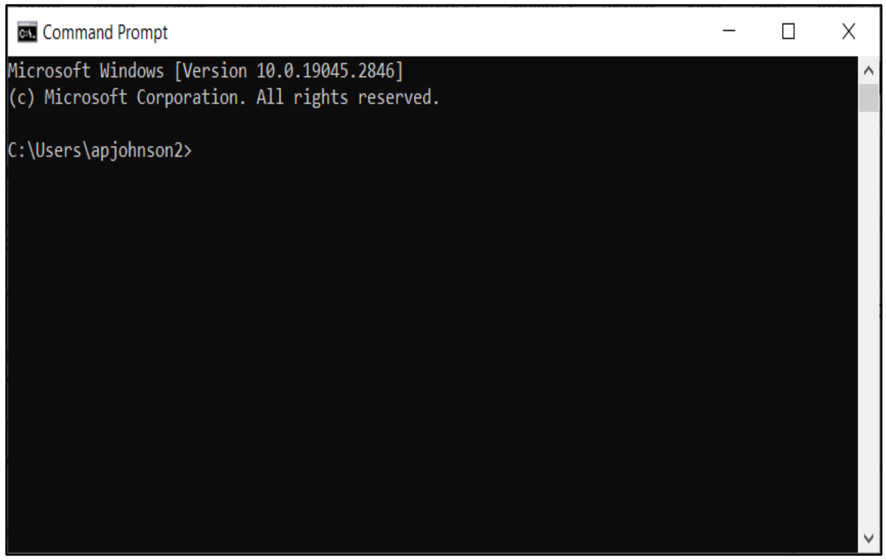


8	In the **OUTPUT FILES** section, right-click on the **pass2ebs.txt** file.	A right-click menu will appear.
9	Select ***Save link as…*** from the drop-down menu.	The **Save As** dialog will appear.

Continued on Following Page

Creating the EBSX File for the Letting

(continued)



10	In the **Save As** dialog, navigate to **C:\Bids\AASHTOWare Project Bids – Gen and Load**. 🗁**NOTE:** If you have **Project Bid Entry** installed on our computer, you will have this directory by default.	N/A
11	Click the SAVE button. 🗁**NOTE:** Do not change the file name.	The **pass2ebs.txt** file will be saved to your **C:\Bids\AASHTOWare Project Bids – Gen and Load** directory.

Continued on Following Page

Creating the EBSX File for the Letting

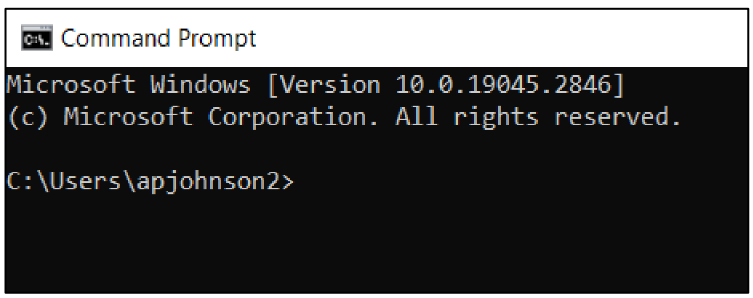
(continued)

If the **C:\Bids\AASHTOWare Project Bids – Gen and Load** directory already contains a Pass2ebs.txt file, either delete it or overwrite it.

When you are finished working with the files on the **Process History Overview** page, you can delete them by following the procedure for **Deleting a Process** on **Page 13-1**.

Command Prompt

12	At this point you will open the **command prompt** window. 🗁**NOTE:** If it is not listed in a menu or a shortcut, type command in the **Windows search box** in your **taskbar**. It should appear first.	The **Command Prompt** window will appear.



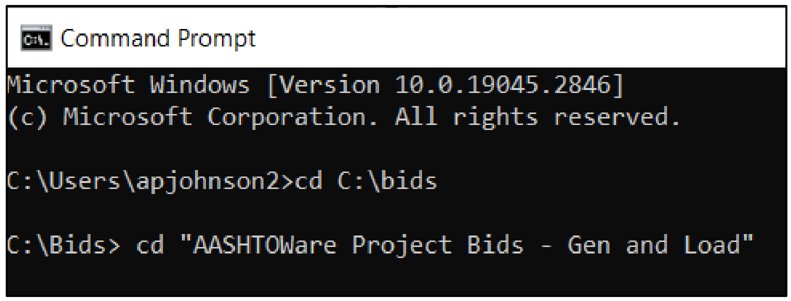
13	Type **cd c:\bids** and press the Enter key.	You've changed the current directory to **c:\Bids**.
14	Type **cd a** and press Tab. **(Not Enter)**	The first directory beginning with A will be displayed

Continued on Following Page

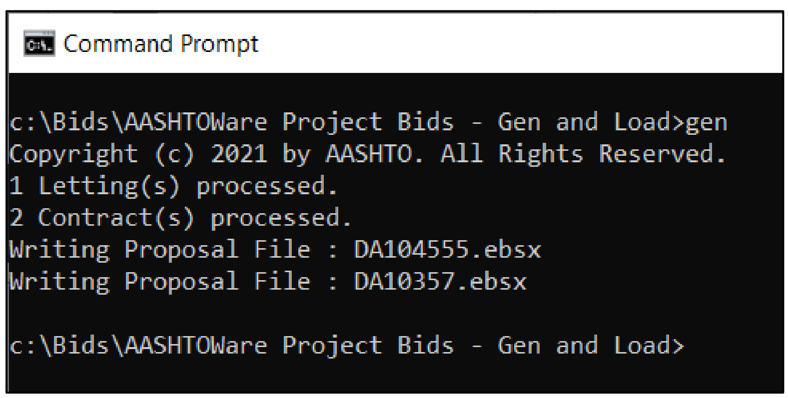
Creating the EBSX File for the Letting

(continued)

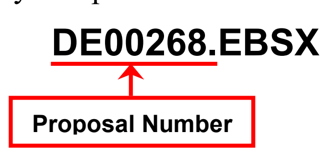
15	Continue to press Tab until the **AASHTOWare Project Bids – Gen and Load** directory is displayed in the command prompt.



16	Press Enter. The directory will change to **c:\Bids\ AASHTOWare Project Bids – Gen and Load.**	You've changed the current directory to **c:\Bids\AASHTOWare Project Bids – Gen and Load**.
17	Type **gen** and press Enter.	The **generate** process will run.



Each file created by this process will have the following format:



A file will be generated for each proposal in the letting.

Continued on Following Page

Creating the EBSX File for the Letting

(continued)

18	Close the **Command Prompt** window.	You have successfully created an ***.EBSX** file for each proposal in the letting.

The DBE_NC.BIN File

The **DBE_NC.BIN** file contains a listing of DBE/MBE/WBE firms. It is used with the **EBSX** file in **Project Bids Bid** and must be placed in the same folder as the **EBSX** file.

The Central Letting Admins/CSDU Staff will be creating and posting the DBE_NC.BIN files here weekly.

https://connect.ncdot.gov/letting/DBE%20Files/DBE_NC.bin

You will need to post this link as an Alert on your Bid Express Letting Page.

Chapter 9 Interested Parties / Authorized Bidders

Setting the Publish Authorized Bidders Field

The **Publish Authorized Bidders** field will allow contractors to sign themselves up so that they are able to bid on a proposal.

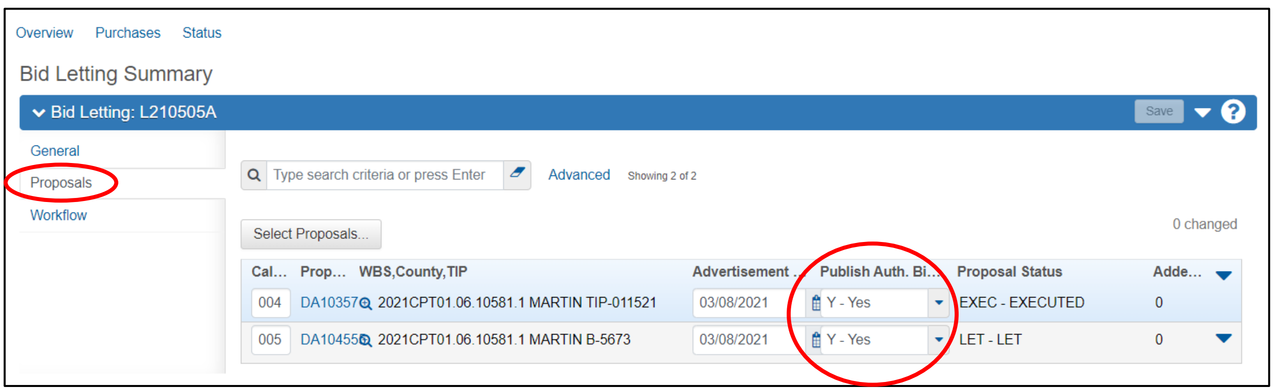
Yes = Public.

No = Internal only.

Follow the procedure for **Finding a Letting** on **Page 5-1**.

From the **Bid Letting Summary** page:

Step	Action	Result
1	Click on the **Proposals** tab.	The **Proposals** tab will appear.



Step	Action	Result
2	Select ***Yes*** or ***No*** from the drop-down list in the **Publish Auth. Bidders** field for each proposal.	N/A

Yes will publish the list to the Public site & Letting Admin Dashboard. **No** will keep it internal, publishing it only to the Letting Admin Dashboard. If this field is left blank, it will not appear on either site.

Setting the Publish Authorized Bidders Field

(continued)

3	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Adding a Firm

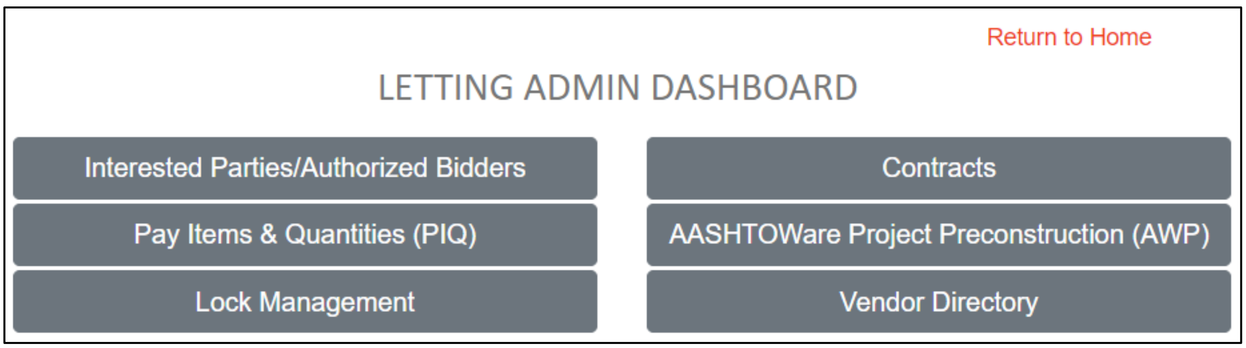
Usually, firms will add themselves through a link on **the Bidding & Letting** pages. You can do this on the firm's behalf if needed.

If you have any questions concerning Interested Parties/Authorized Bidders, contact interestedpartieshelp@ncdot.gov.

To add a firm to the list, perform the following steps:

From the Letting Admin Dashboard

Step	Action	Result
1	In the address bar of your web browser, type https://connect.ncdot.gov/site/Preconstruction/Pages/LADM.aspx# and press Enter.	The **Letting Admin Dashboard** page will appear.

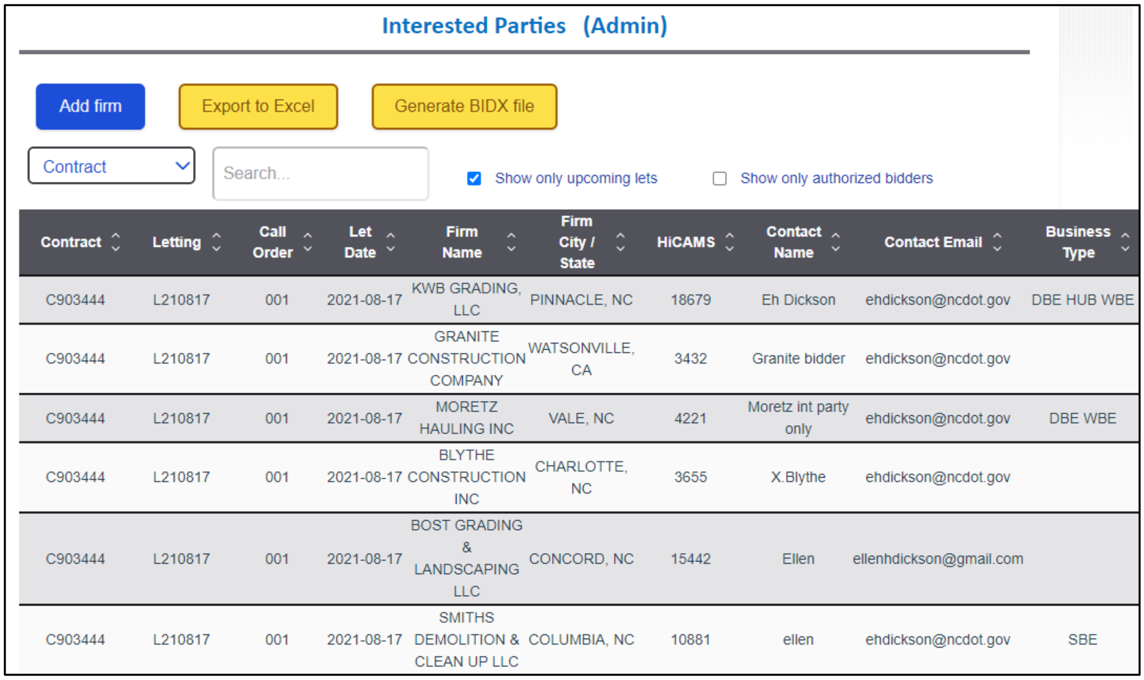


Step	Action	Result
2	Click the **Interested Parties / Authorized Bidders** button.	The list of options will appear.
3	Click the ***View/Edit List*** link.	The **Interested Parties (Admin)** page will appear.

Continued on Following Page

Adding a Firm

(continued)

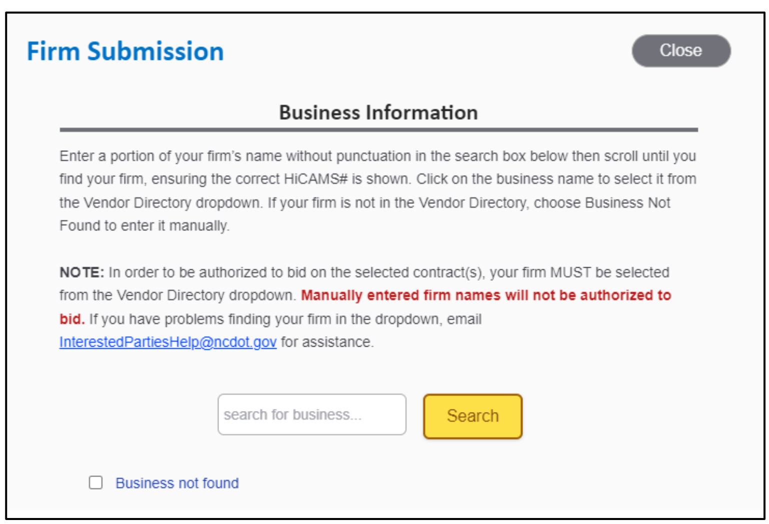


Contract	Letting	Call Order	Let Date	Firm Name	Firm City / State	HiCAMS	Contact Name	Contact Email	Business Type
C903444	L210817	001	2021-08-17	KWB GRADING, LLC	PINNACLE, NC	18679	Eh Dickson	ehdickson@ncdot.gov	DBE HUB WBE
C903444	L210817	001	2021-08-17	GRANITE CONSTRUCTION COMPANY	WATSONVILLE, CA	3432	Granite bidder	ehdickson@ncdot.gov	
C903444	L210817	001	2021-08-17	MORETZ HAULING INC	VALE, NC	4221	Moretz int party only	ehdickson@ncdot.gov	DBE WBE
C903444	L210817	001	2021-08-17	BLYTHE CONSTRUCTION INC	CHARLOTTE, NC	3655	X.Blythe	ehdickson@ncdot.gov	
C903444	L210817	001	2021-08-17	BOST GRADING & LANDSCAPING LLC	CONCORD, NC	15442	Ellen	ellenhdickson@gmail.com	
C903444	L210817	001	2021-08-17	SMITHS DEMOLITION & CLEAN UP LLC	COLUMBIA, NC	10881	ellen	ehdickson@ncdot.gov	SBE

The list will display only the bidders for upcoming lettings by default.

Before adding a firm, search the list to make sure they haven't already been entered.

4	Click the **ADD FIRM** button.	The **Firm Submission** dialog will appear.

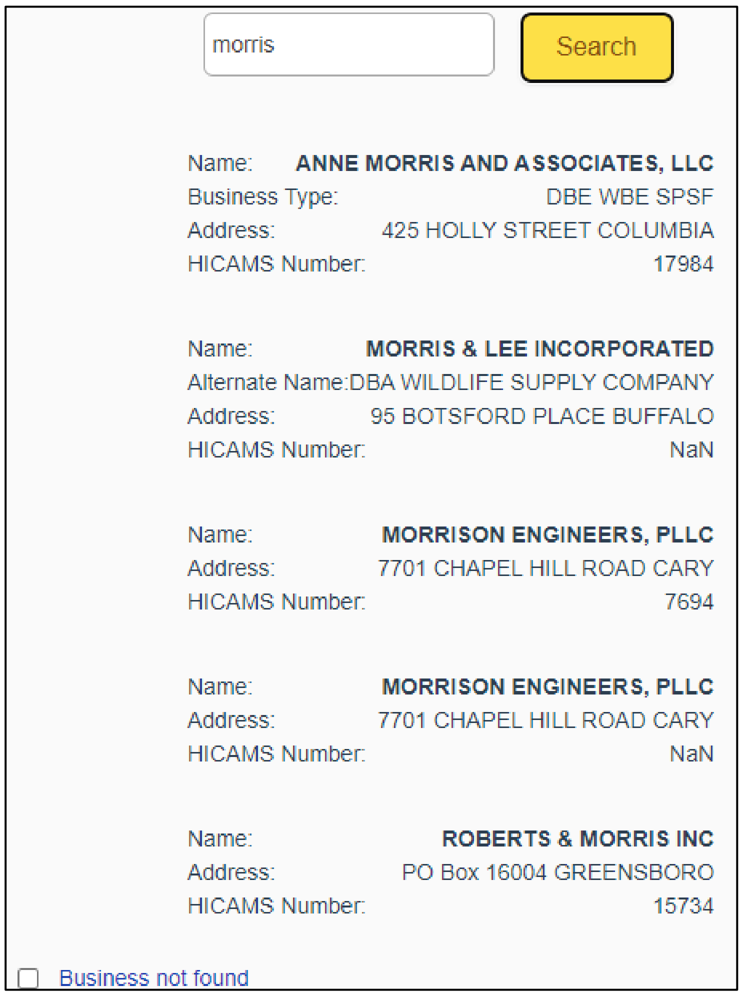


Continued on Following Page

Adding a Firm

(continued)

5	Type ***the beginning of the firm name*** in the **SEARCH FOR BUSINESS** field.	N/A
6	Click the **SEARCH** button. 🗁**NOTE:** This will search the master vendor list in SAP.	A list of firms will appear.

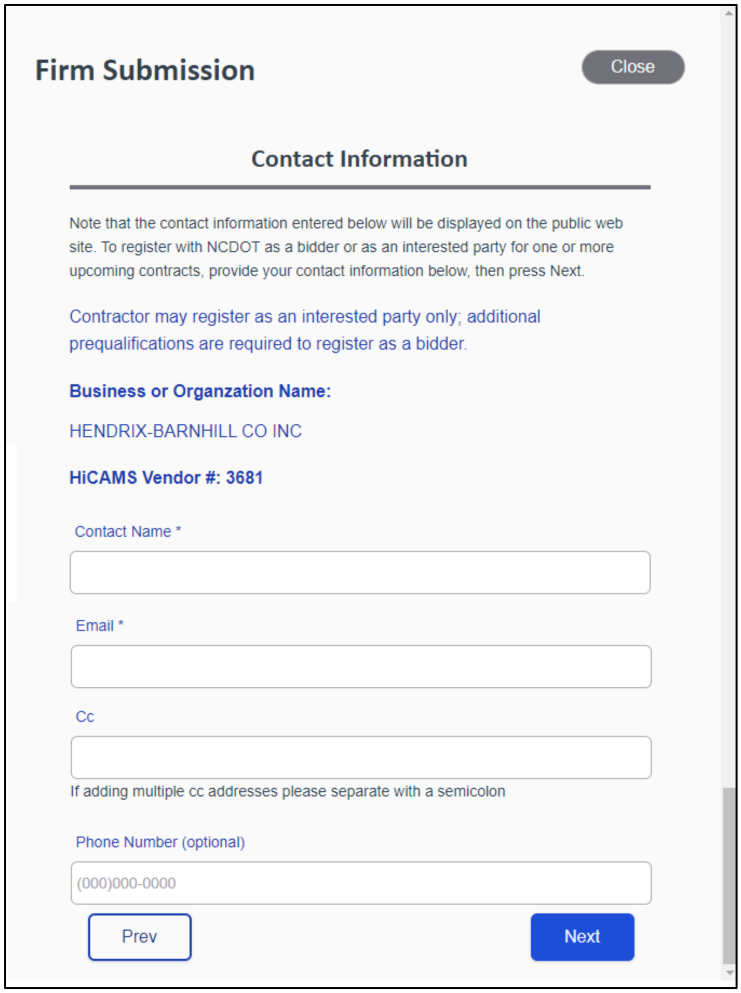


7	Click on ***the firm name***.	Information about the selected firm will appear.
8	If this is the correct firm, click the **NEXT** button.	N/A

Continued on Following Page

Adding a Firm

(continued)



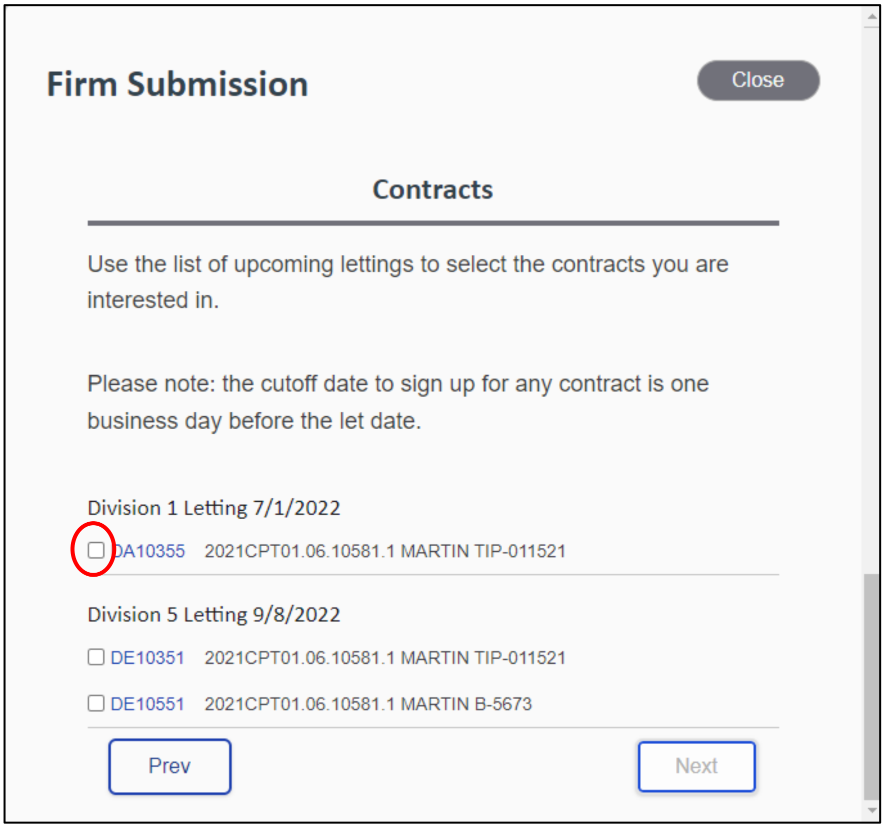
9	Type ***the name of the contact at the firm who wishes to be notified of any changes in the selected upcoming lettings*** in the **CONTACT NAME** field.	N/A
10	Type ***their email*** in the **EMAIL** field.	N/A
11	If applicable, type ***their phone number*** in the **PHONE NUMBER** field.	N/A

Continued on Following Page

Adding a Firm

(continued)

12	Click the **NEXT** button.	All upcoming lettings & the list of contracts within each letting will be displayed.

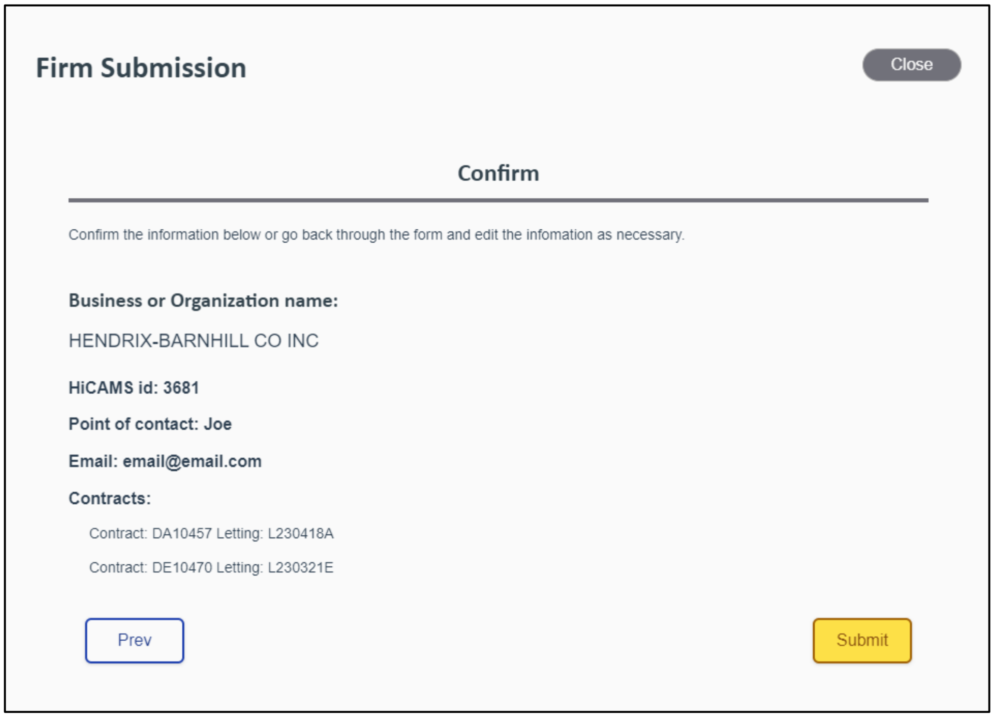


13	Check the box to the left of ***all contracts this firm has an interest in*** to select them.	N/A
14	Click the **NEXT** button.	The **Confirm** page will be displayed.

Continued on Following Page

Adding a Firm

(continued)



15	If everything is correct, click the **SUBMIT** button. 🗁**NOTE:** If any corrections need to be made, click the **PREV** button, and repeat **Steps 13-14**.	The entries will be added to the list & a confirmation email will be sent to the supplied contact email.

If they are eligible, the firm will be registered as a bidder.

If not, they will be registered as an interested party only.

See **Uploading Bid Data Files to NCDOT.gov** on **Page 7-5.**

This procedure ensures that all files needed for a proposal can be viewed by the **Interested Parties/Authorized Bidders**.

The next pages will show you how to access this function from the **Bidding and Letting Pages** instead of the **Letting Admin Dashboard**.

Continued on Following Page

Adding a Firm

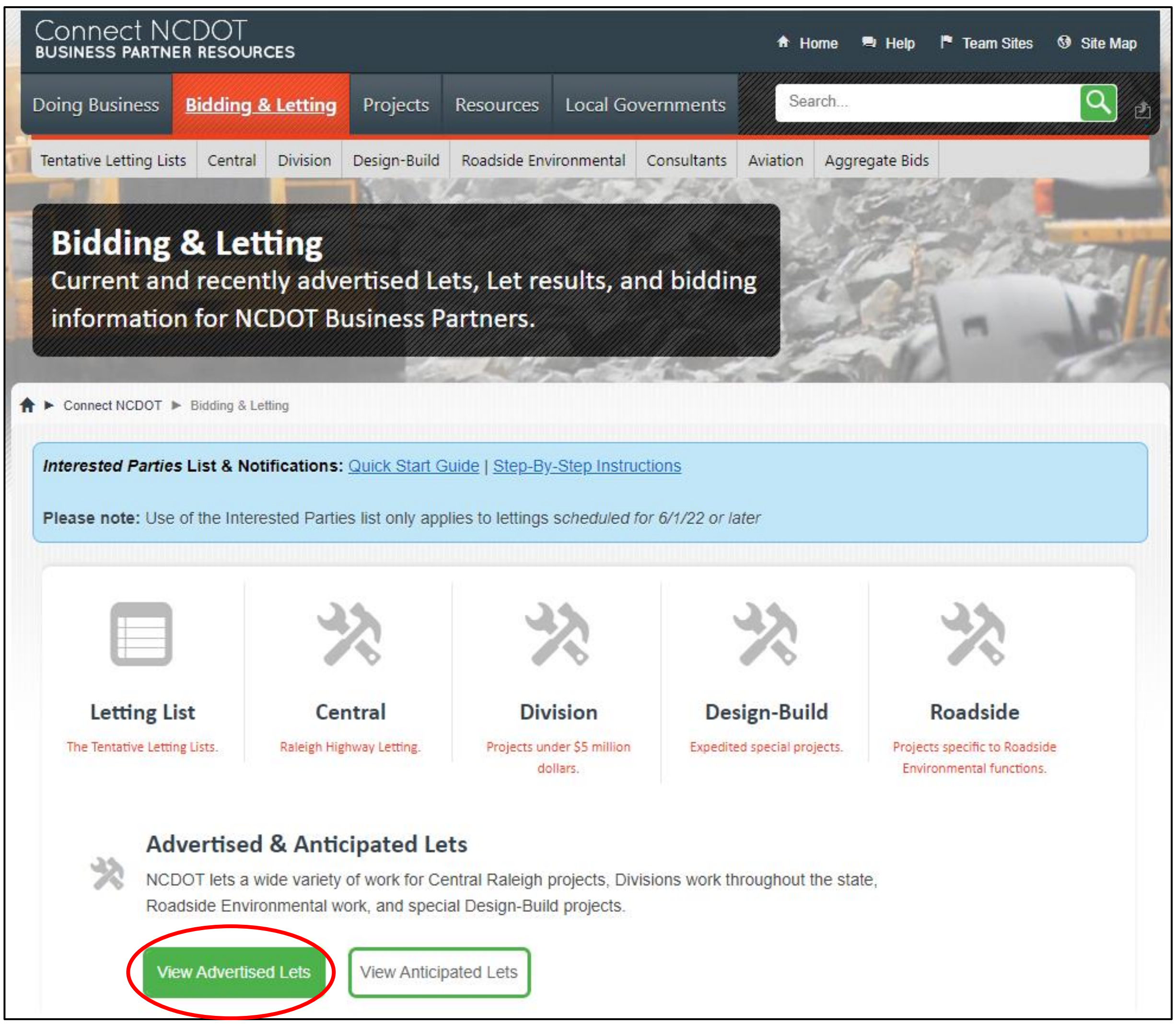
(continued)

From the Bidding & Letting Page

The following steps will show how firms can add themselves.

If you have any questions concerning Interested Parties/Authorized Bidders, contact interestedpartieshelp@ncdot.gov.

Step	Action	Result
1	In the address bar of your web browser, type HTTPS://CONNECT.NCDOT.GOV/LETTING/PAGES/DEFAULT.ASPX and press Enter.	The **Bidding & Letting** page will appear.

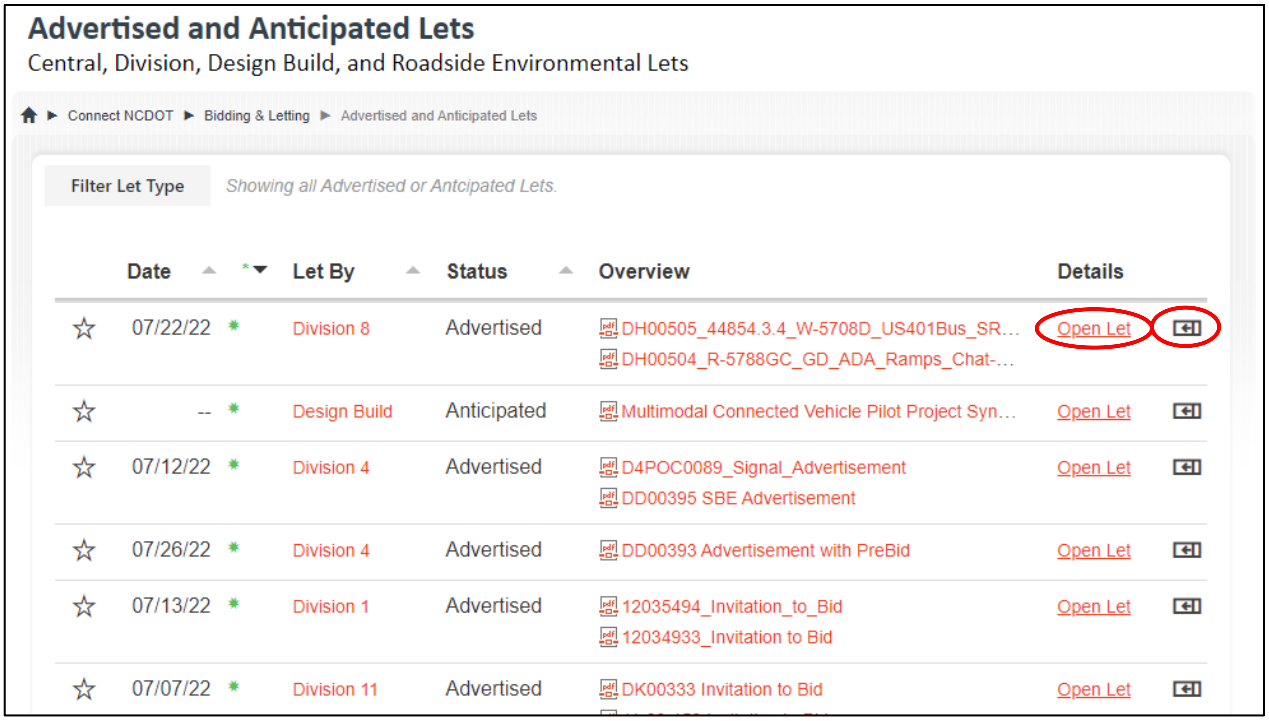


Continued on Following Page

Adding a Firm

(continued)

2	Click the **VIEW ADVERTISED LETS** button.	The list of **Advertised and Anticipated Lets** will appear.

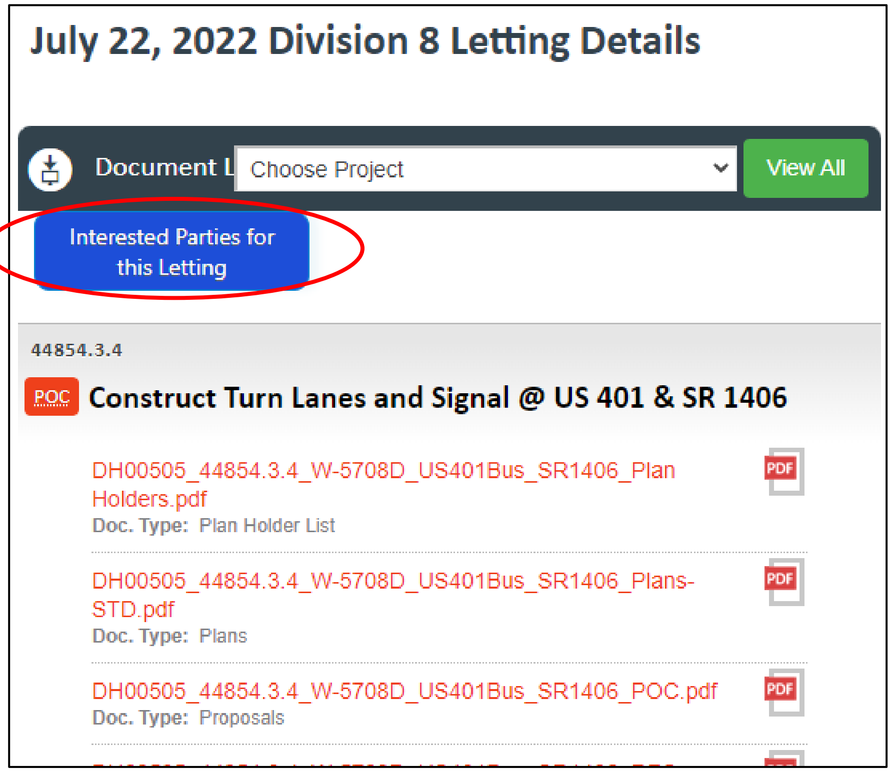


3	Click the ***Open Let*** link or the arrow button on the right side of the letting you wish to view.	If you click the link, the **Letting** page will open in a new browser tab. If you click the arrow button, the **Letting** page will open in a popup window.

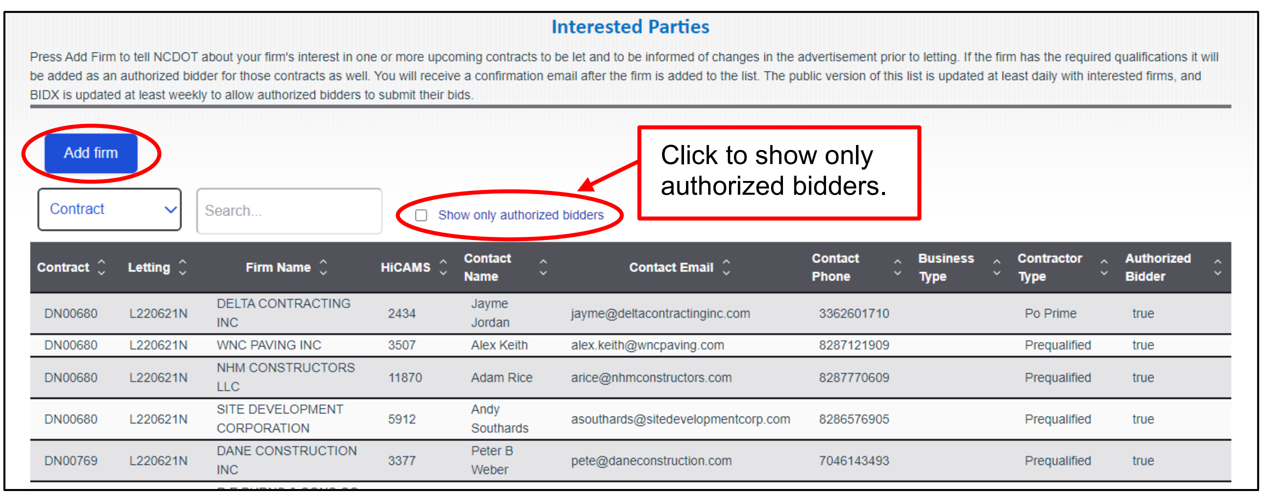
Continued on Following Page

Adding a Firm

(continued)



4	Click the **INTERESTED PARTIES FOR THIS LETTING** button.	The **Interested Parties List** will appear filtered by this Letting.

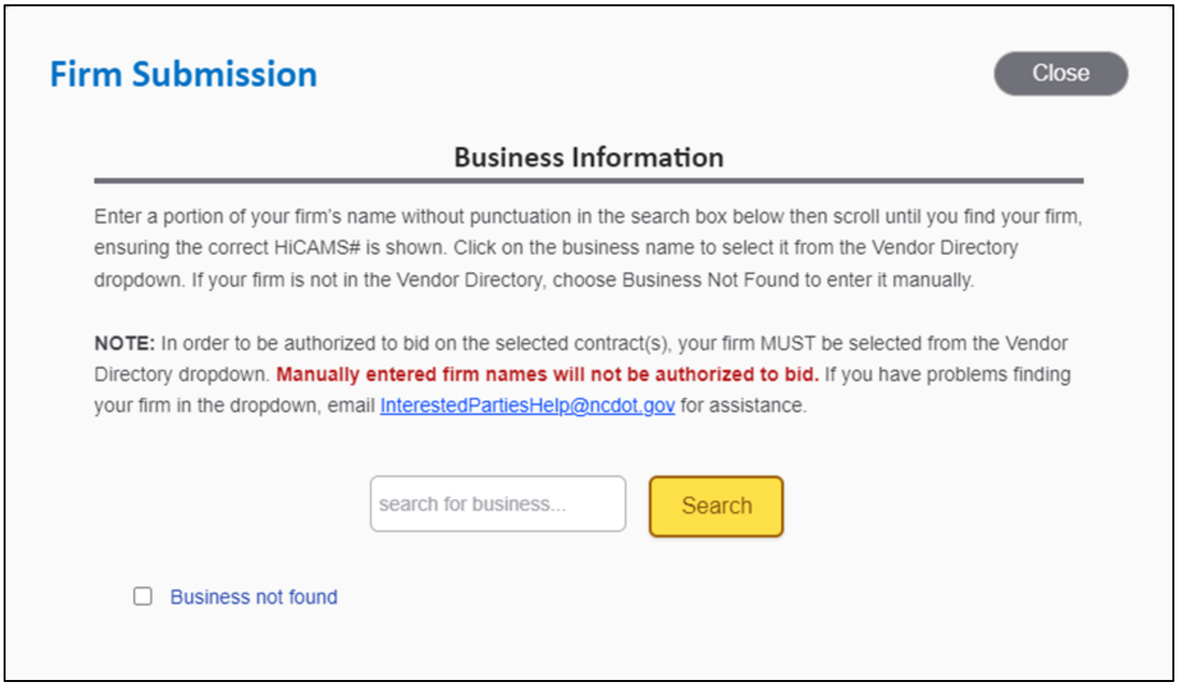


Continued on Following Page

Adding a Firm

(continued)

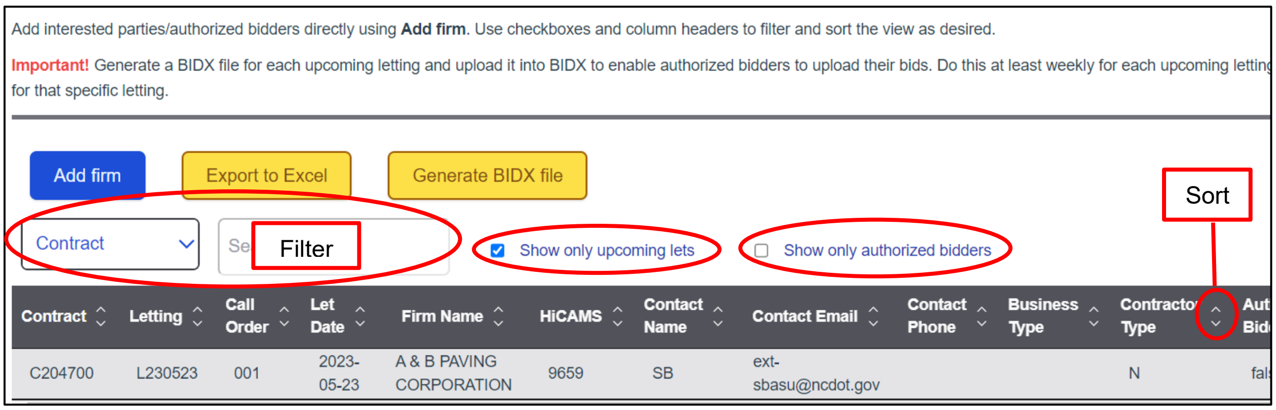
5	Click the **ADD FIRM** button to add a new firm to the letting.	The **Firm Submission** dialog will appear.



Filtering & Sorting

To **filter** the Interested Parties list to show only entries relative to a given letting, contract, firm, let date, etc., select the relevant filter from the drop-down list in the field beneath the **ADD FIRM** button, then type the value to filter on in the **SEARCH** field.

To **sort** the list by a given column, click on the up and down arrows next to that column name to order the list by those values in ascending or descending order.



To see entries from <u>past</u> lettings, unselect the **SHOW ONLY UPCOMING LETS** checkbox.

This checkbox will not appear if you are accessing this page from the **Advertised and Anticipated Lets** list.

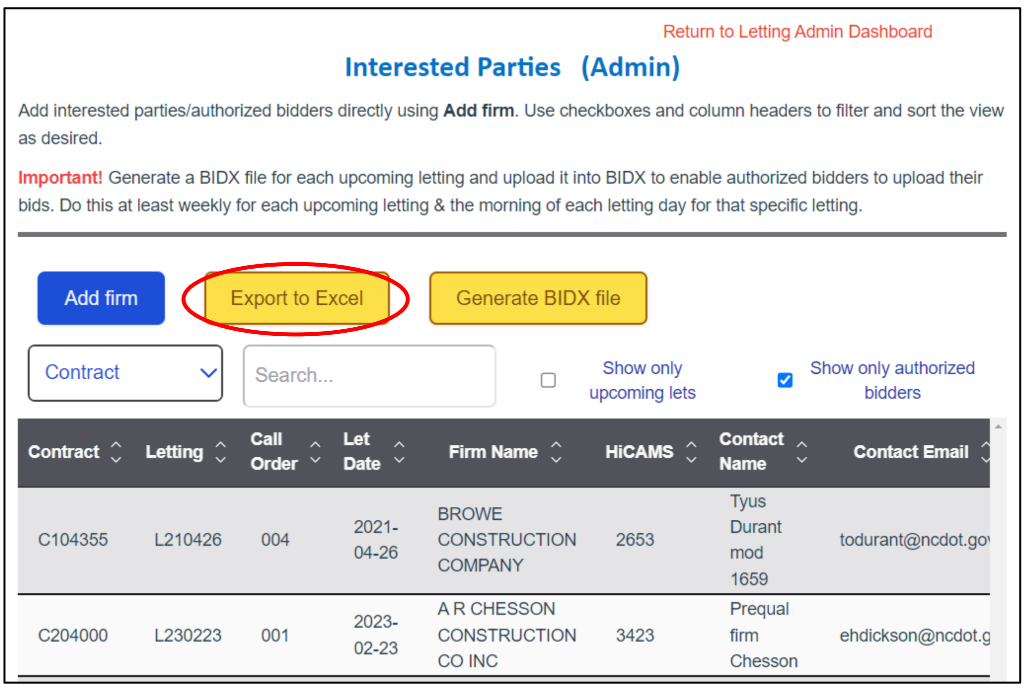
To limit the list shown to authorized bidders only, select the **SHOW ONLY AUTHORIZED BIDDERS** checkbox.

Exporting to Excel

To print off a portion of the list, or to combine it with other information for some custom reporting, download a portion of the list to an Excel file.

From the **Letting Admin Dashboard**:

Step	Action	Result
1	Click the **INTERESTED PARTIES / AUTHORIZED BIDDERS** button.	The list of options will appear.
2	Click the ***View/Edit List*** link.	The **Interested Parties (Admin)** page will appear.



The list will display only the bidders for upcoming lettings by default.

Before adding a firm, search the list to make sure they haven't already been entered.

3	Filter / sort the list to narrow and order the results as desired. See **Filtering & Sorting** on **Page 9-13**.	N/A

Continued on Following Page

Exporting to Excel

(continued)

4	Click the **EXPORT TO EXCEL** button.	The selected entries will be downloaded in a spreadsheet and saved in your **Downloads** folder.

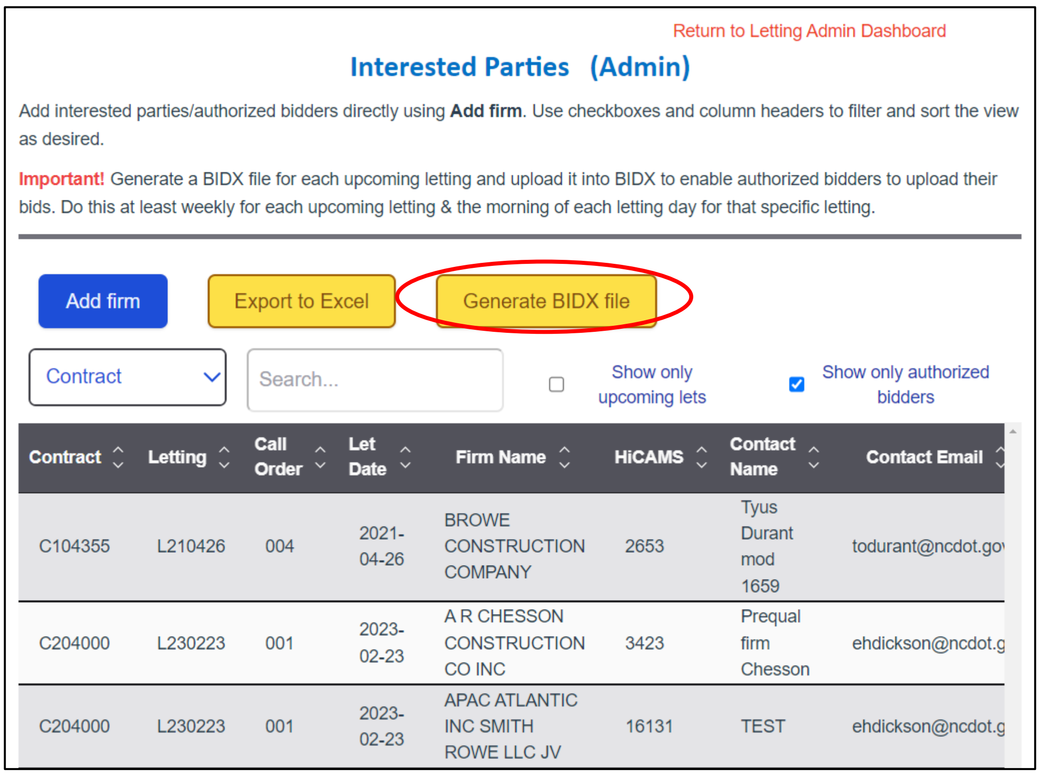
You will be able to edit, save and print the downloaded Excel file as you choose.

Generating the BIDX Control File

Firms interested in bidding can add themselves to the Interested Parties / Authorized Bidders list. To tell **Bid Express** to accept bids from these firms, the letting administrator needs to generate a control file for each letting & upload it into **Bid Express**. This file tells **Bid Express** which firms to accept bids from.

From the **Letting Admin Dashboard**:

Step	Action	Result
1	Click the **INTERESTED PARTIES / AUTHORIZED BIDDERS** button.	The list of options will appear.
2	Click the ***View/Edit List*** link.	The **Interested Parties (Admin)** page will appear.

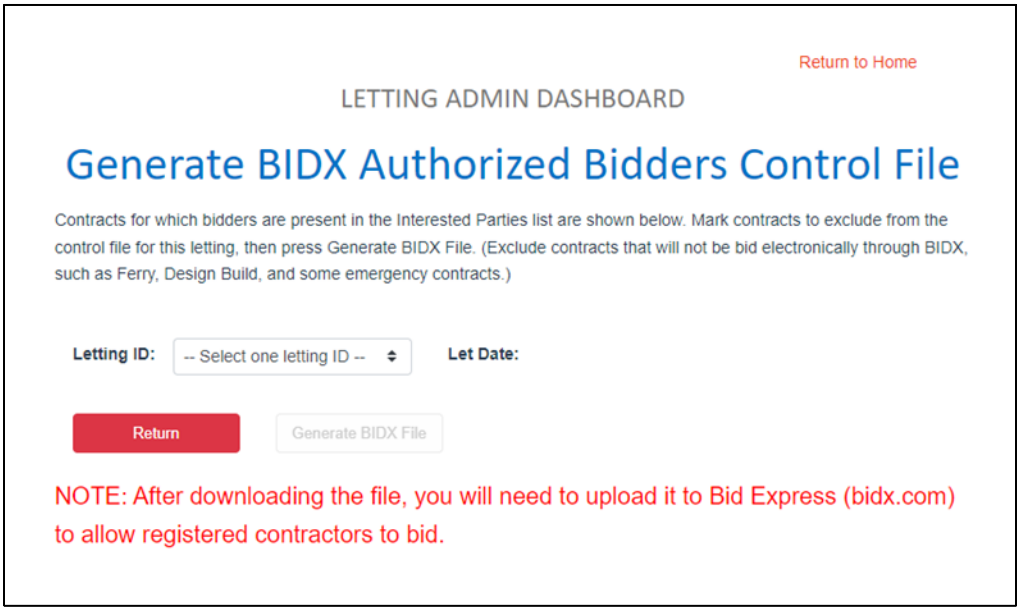


Step	Action	Result
3	Click the **GENERATE BIDX FILE** button.	The following page will appear.

Continued on Following Page

Generating the BIDX Control File

(continued)



4	Select ***the Letting Number*** from the drop-down list in the **LETTING ID** field.	A list of **contracts** associated with the **Letting** will appear.
5	If there are any **contracts** you wish to exclude from the **BIDX file**, click the check box to the right of the contract number.	The selected contracts will be excluded from the **BIDX Control File**.

🗁**NOTE:** If the contract is not going to receive electronic bids in BIDX, then you should not generate & then upload the list of authorized bidders for it.

6	Click the **GENERATE BIDX FILE** button.	The **BIDX Control File** will be downloaded to your **Downloads** folder.

This is the file needed to upload into BID Express to authorize the specified bidders to submit bids on contracts in that letting.

Continued on Following Page

Generating the BIDX Control File

(continued)

How Often Does This Need to Happen?

To enable new bidders to upload their bids to Bid Express, Letting Admins need to generate the BIDX control file for each upcoming letting at least once a week AND upload it into Bid Express to authorize specific bidders to submit their bids. It is also recommended that you do this on the day of the letting to ensure that last minute bidders are able to upload their bids.

Since prequalifications expire at the end of the month, completing this process at the beginning of each month ensures that disqualified bidders are removed.

Prequalification Changes

At the time the bidders added themselves to the list, a check was made of their prequalification status in SAP. If they were qualified to bid on the selected contracts, they were entered into the list as authorized bidders for those contracts. When the BIDX file is generated, the system will re-check that prequalification status.

In the time between the initial sign up and BIDX file generation, if a firm has lost its prequalification status and are no longer qualified to bid on that contract, the entry in the Interested Parties list will be changed to show that firm is not an authorized bidder.

An email will be sent to the contact specified in the Interested parties list for this firm for this letting, indicating for which contract(s) their bidder status has changed.

The public display of the interested parties/authorized bidders for this letting on the Bidding & Letting pages will be updated to show this firm as an interested party but no longer an authorized bidder.

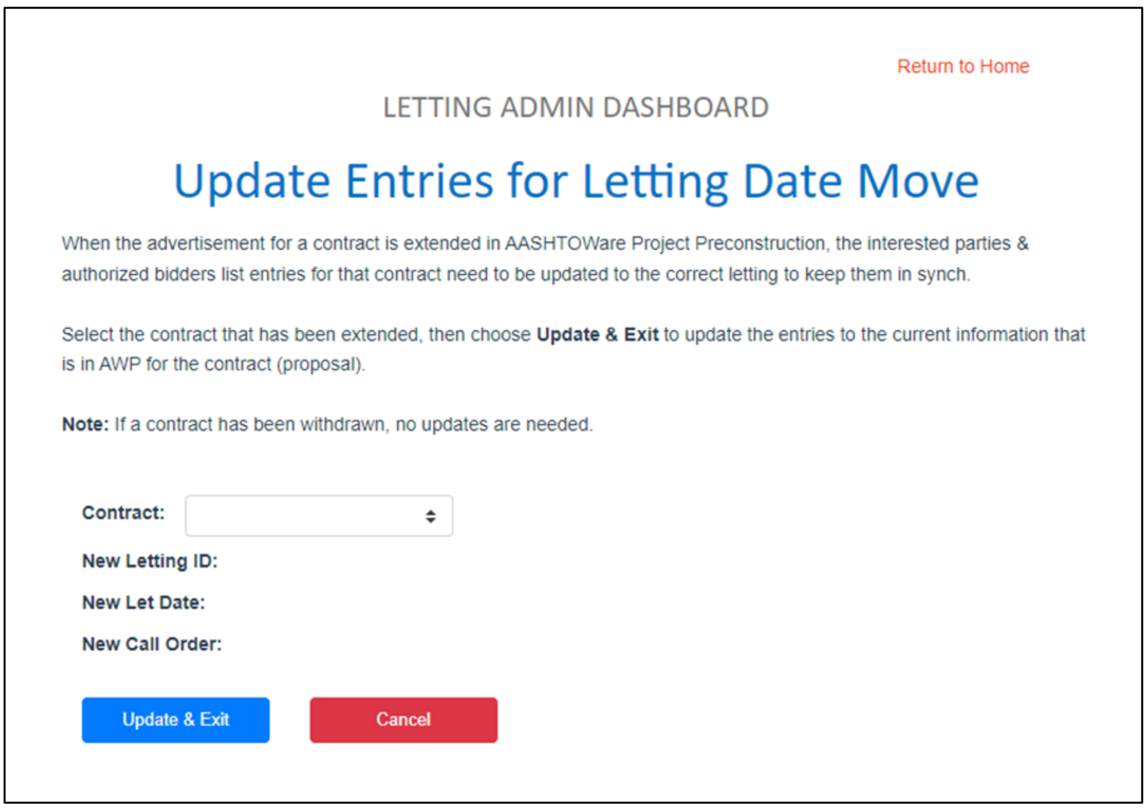
Updating Entries for Letting Date Move

If a contract advertisement is extended, or if a contract is put on hold & reinstated later in a different letting, the Letting Administrator needs to ensure that firms who previously expressed an interest in, or an intent to bid on that contract, are reconnected. The **Interested Parties** list entries will need to have the let date updated for these contracts.

After the changes are made in AWP, do the following:

From the **Letting Admin Dashboard**:

Step	Action	Result
1	Click the **INTERESTED PARTIES / AUTHORIZED BIDDERS** button.	The list of options will appear.
2	Click the ***Update Entries for Letting Date Move*** link.	The **Update Entries for Letting Date Move** page will appear.



Continued on Following Page

Updating Entries for Letting Date Move

(continued)

3	Select ***the contract you wish to move*** from the drop-down list in the **CONTRACT** field.	The **NEW LETTING ID** and **NEW LET DATE** fields will populate.

🗁**NOTE:** Once you have selected the contract, the system retrieves the new letting id, let date, and call order number from AWP.

4	Click the **UPDATE & EXIT** button.	The **Interested Parties** list entries for the contract will be updated with the new letting and let date information.

This change will be reflected on the public **Bidding & Letting** web pages.

The firms who previously expressed an interest will show up as **Interested Parties**.

See **Uploading Bid Data Files to NCDOT.gov** on **Page 7-5.**

This procedure ensures that all files needed for a proposal can be viewed by the **Interested Parties/Authorized Bidders**.

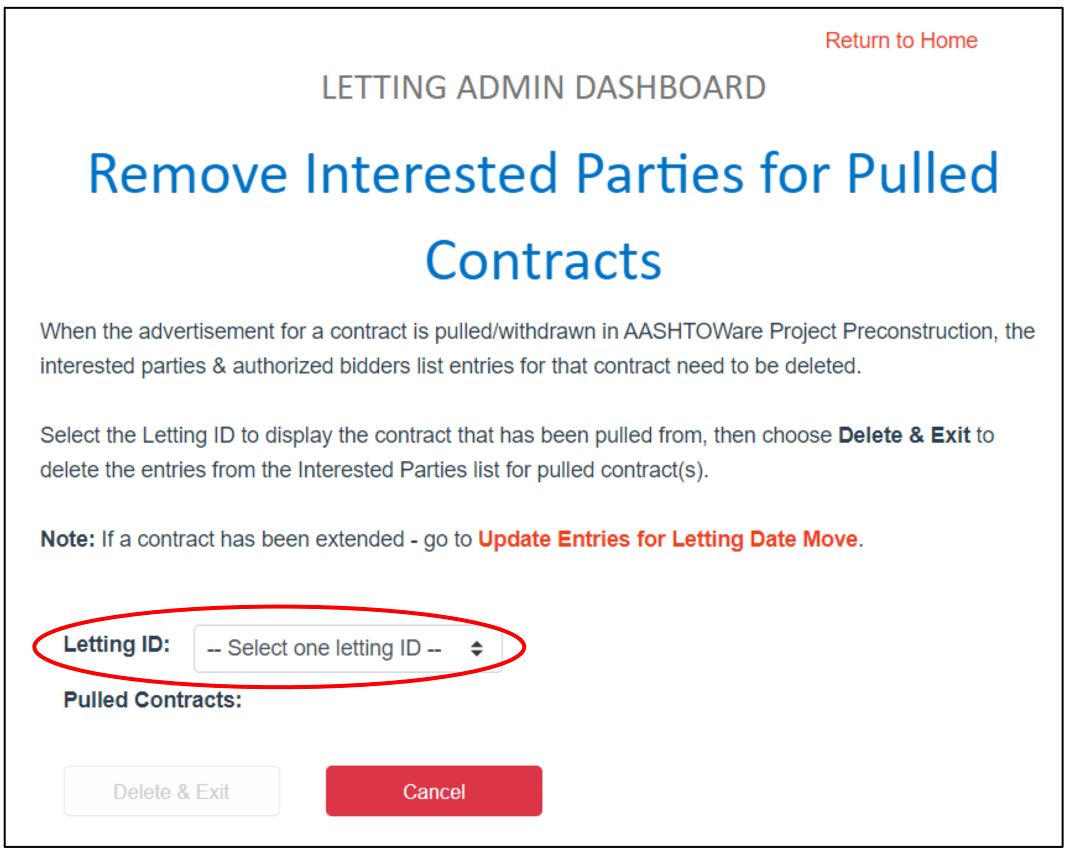
Removing Interested Parties for Pulled Contracts

When the advertisement for a contract is pulled/withdrawn in AWP, the interested parties & authorized bidders list entries for that contract will need to be deleted.

Select the Letting ID to display the contract that has been pulled from, then choose Delete & Exit to delete the entries from the Interested Parties list for pulled contract(s).

From the **Letting Admin Dashboard**:

Step	Action	Result
1	Click the **INTERESTED PARTIES / AUTHORIZED BIDDERS** button.	The list of options will appear.
2	Click the ***Remove Interested Parties for Pulled Contracts*** link.	The **Update Entries for Letting Date Move** page will appear.

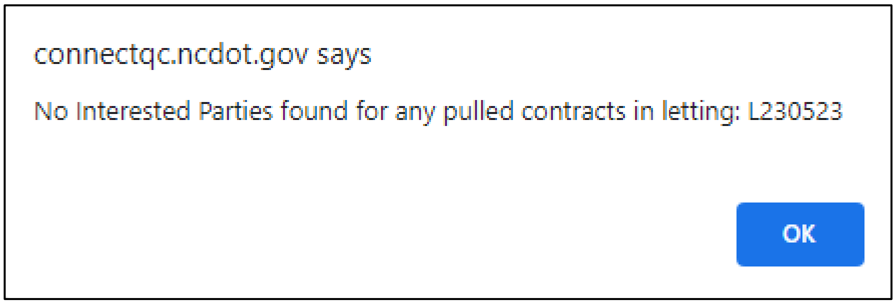


Continued on Following Page

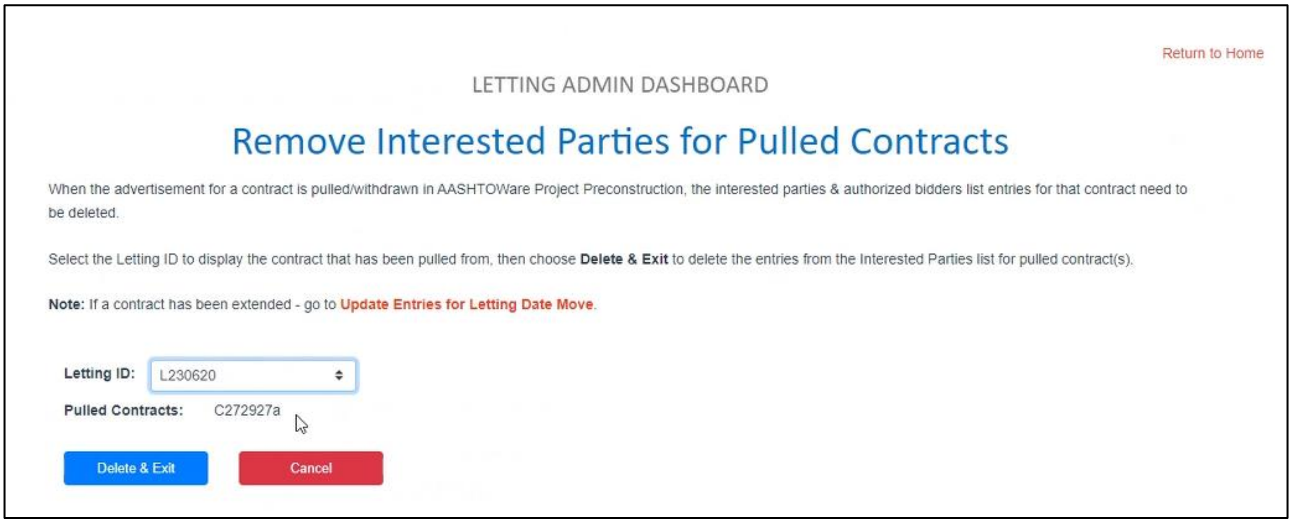
Removing Interested Parties for Pulled Contracts

(continued)

3	Select ***the Letting ID*** from the drop-down list in the **LETTING ID** field.	The list of **PULLED CONTRACTS** will populate.



If the selected Letting ID doesn't have any Interested Parties associated with it, this message will appear.

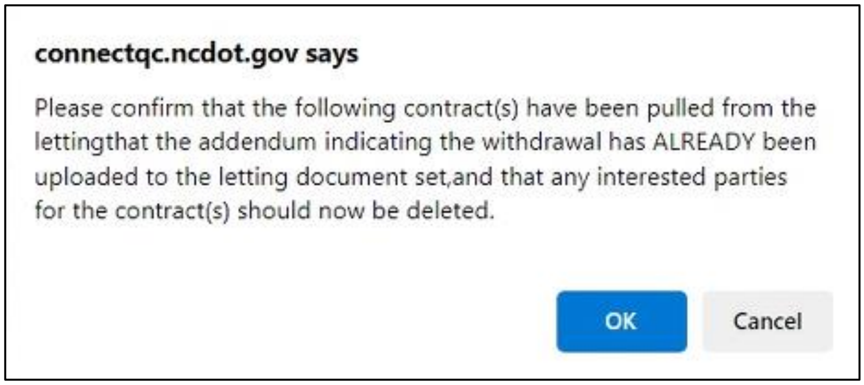


4	Click the **DELETE & EXIT** button.	The following message will appear.

Continued on Following Page

Removing Interested Parties for Pulled Contracts

(continued)



5	Click the **OK** button.	The following message will appear.

The Interested Parties will be deleted from the contract.

This change will be reflected on the public **Bidding & Letting – Interested Parties** web page.

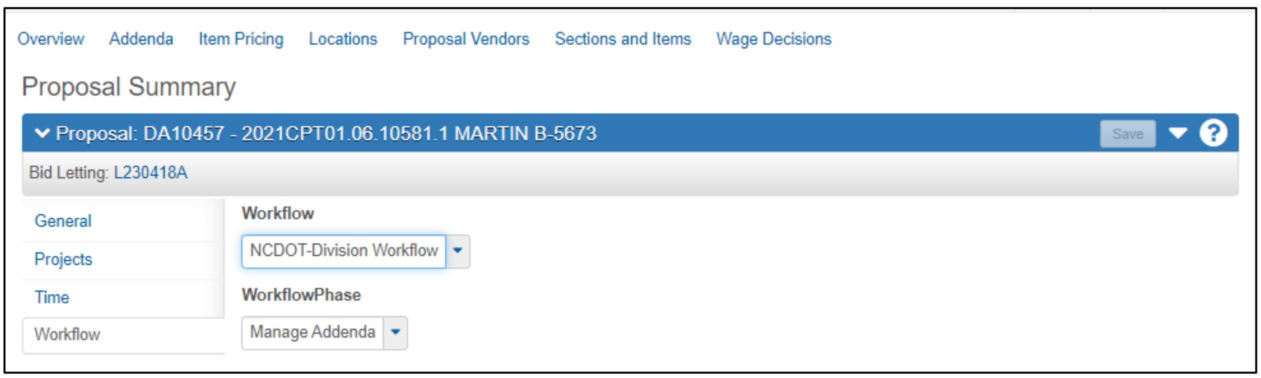
Chapter 10 Addenda

Occasionally, after a proposal has been advertised and the files are in the contractor's hands to enter bids, changes may need to be made to the status of an item, quantity, or any information that was originally sent out. To facilitate these changes, NCDOT uses an addendum process to amend the information that was distributed to the contractors.

Creating an Addendum for Adding a New Item

Follow the procedure for **Finding a Proposal** on **Page 4-1**.

From the ***Proposal Summary*** page:



(*Proposal Summary – Workflow Tab*)

Step	Action	Result
1	On the left side of the page, click on the **Workflow** tab.	The **Workflow** tab will appear.
2	Select ***NCDOT – Division Workflow*** from the drop-down list in the **Workflow** field.	Your selection will appear in the **Workflow** field.
3	Select ***Manage Addenda*** from the drop-down list in the **Workflow Phase** field.	Your selection will appear in the **Workflow Phase** field.

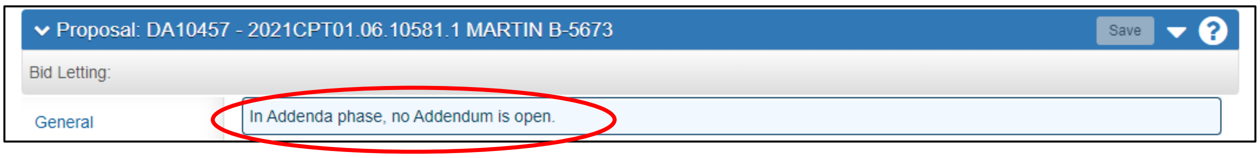
Continued on Following Page

Creating an Addendum for Adding a New Item

(continued)

4	Click the SAVE button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

An additional message will appear in blue just beneath the Header bar.



5	Click the ***Addenda*** quick link.	The **Addendum Summary** page will appear.

An empty record will appear on the page.

Press the NEW button to add additional records.

6	Type ***ADD ITEM*** in the DESCRIPTION field. **NOTE:** The contractors will be able to see this information.	N/A
7	Type ***any comments about the addendum*** in the COMMENTS field. **NOTE:** This information is hidden from contractors.	N/A
8	Click the SAVE button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Once the addendum is saved, it will be automatically numbered.

9	Click the ***Proposal*** Quick Link at the top of the page.	The **Proposal Summary** page will appear.

Continued on Following Page

Creating an Addendum for Adding a New Item

(continued)

To view items in the proposal, click the **SECTIONS AND ITEMS** Quick Link, then select the **Proposal Items** tab.

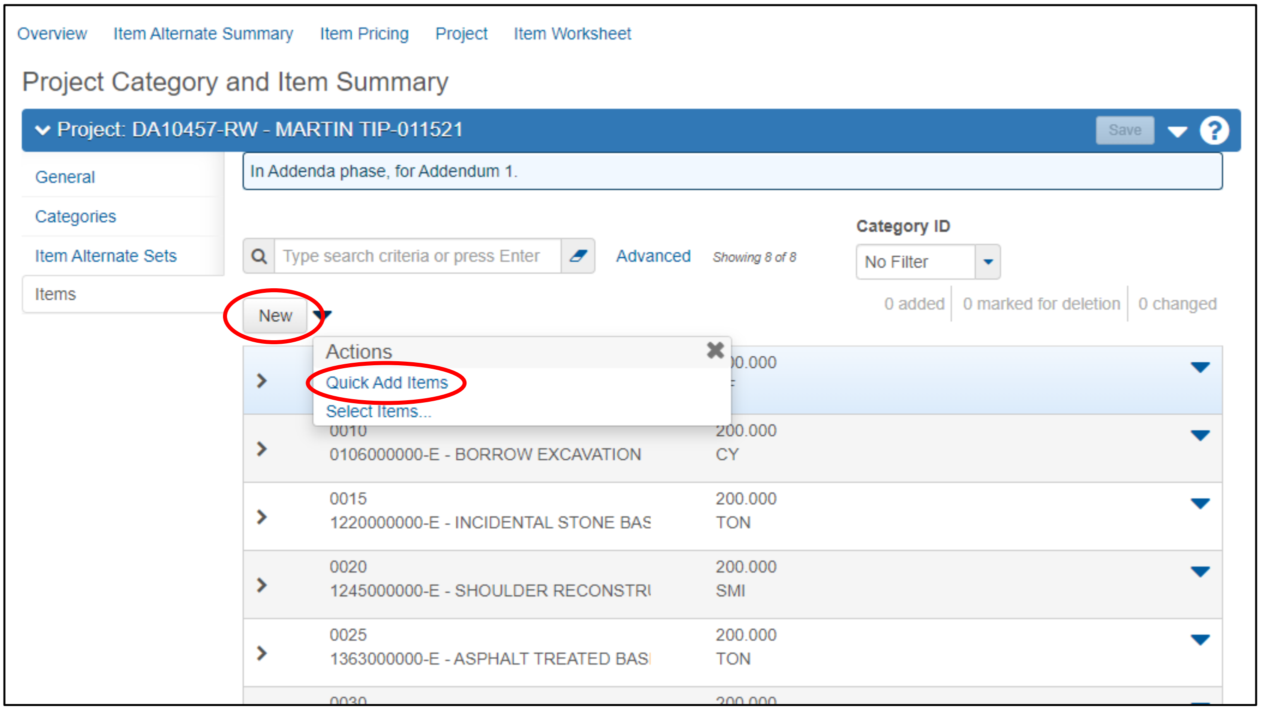
When you are adding an item, you will be able to see which number is last so that you can assign the next line number to the new item.

10	Click on the **Projects** tab.	The **Projects** tab will appear.
11	Click on ***the project to which you wish to add items***.	The **Project Summary** page will appear.
12	Click the ***Categories and Items*** Quick Link.	The **Project Category and Item Summary** page will appear.
13	Click the **Items** tab.	The **Items** tab will appear.

Continued on Following Page

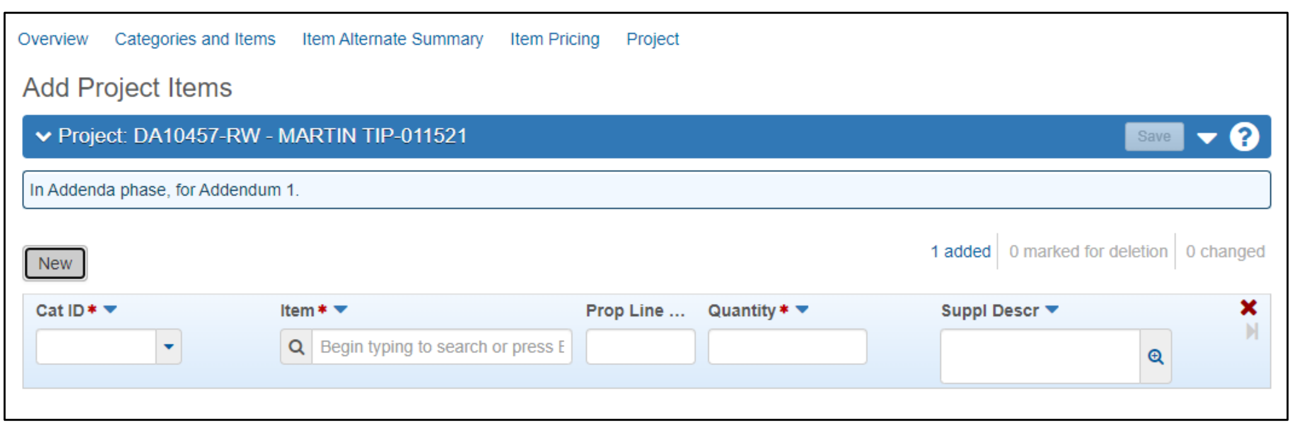
Creating an Addendum for Adding a New Item

(continued)



(*Project Category and Item Summary Page*)

14	Click the drop-down arrow to the right of the **NEW** button.	A drop-down menu will appear.
15	Select ***Quick Add Items*** from the menu.	The **Add Project Items** page will appear.



(*Add Project Items Page*)

Continued on Following Page

Creating an Addendum for Adding a New Item

(continued)

16	Select ***the category ID*** from the drop-down list in the **CAT ID** field.	N/A

🗁**NOTE:** Since some projects may have multiple structures or Non-Participating work, select the appropriate category for the funding source to which the addendum refers.

17	Start typing ***the item name or number*** in the **ITEM** field. The drop-down list will auto-filter as you type. Select ***the item*** from the list that appears.	N/A
18	Type ***the proposal line number*** in the **PROPOSAL LINE NUM** field.	N/A

🗁**NOTE:** This should be the next proposal line number in sequence. (By adding this number to the end of the other line numbers, all previous references to line numbers do not need to be revisited.)
Always add items to the end of the items list, never to the middle.

19	Type ***the quantity of the item*** in the **QUANTITY** field.	N/A

If the item requires a supplemental description, a red asterisk * will appear to the left of the field name.

20	If a supplemental description is required for this item, type it in the **SUPPL DESCR** field., otherwise leave it blank.	N/A

To add additional items, click the **NEW** button and repeat **Steps 16-20**.

The **PROPOSAL LINE NUMBER** will increase by one with each new item.

Continued on Following Page

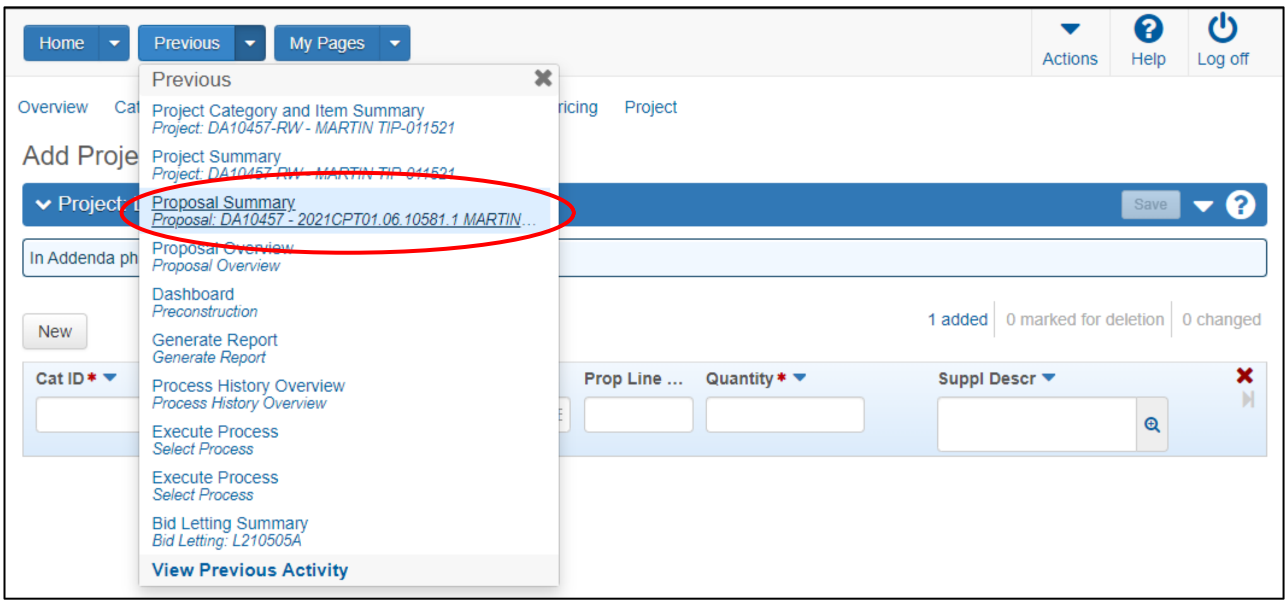
Creating an Addendum for Adding a New Item

(continued)

21	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

🗁**NOTE:** Previously entered information will disappear after it has been saved to the item worksheet.

At this point, you will assign the new item(s) to the correct section(s).

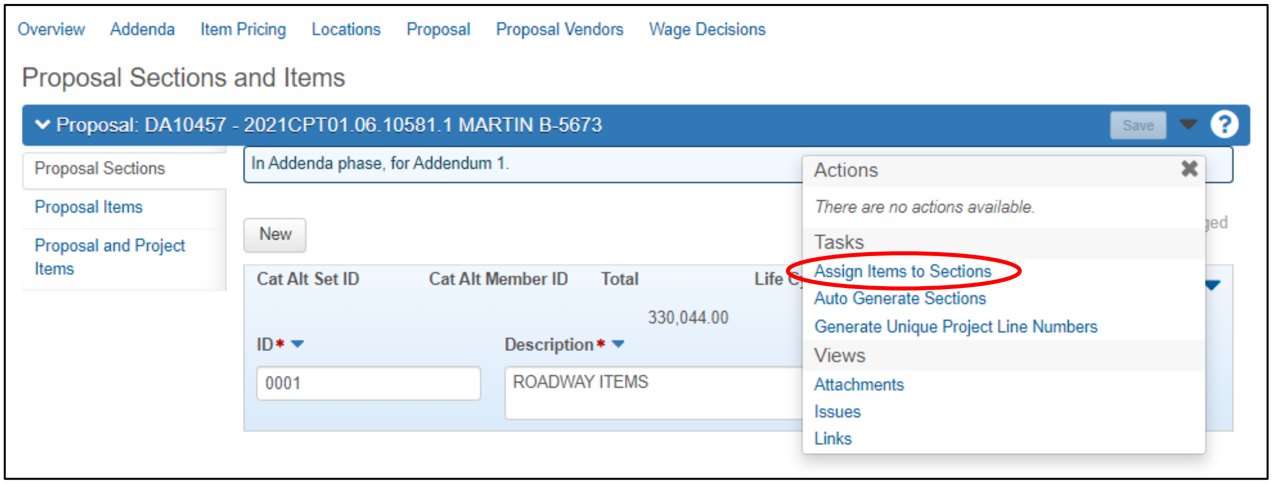


22	Return to the **Proposal Summary** page by selecting it from the **PREVIOUS** drop-down menu	You will return to the **Proposal Summary** page.
23	Click the **SECTIONS AND ITEMS** Quick Link.	The **Proposal Sections and Items** page will appear.

Continued on Following Page

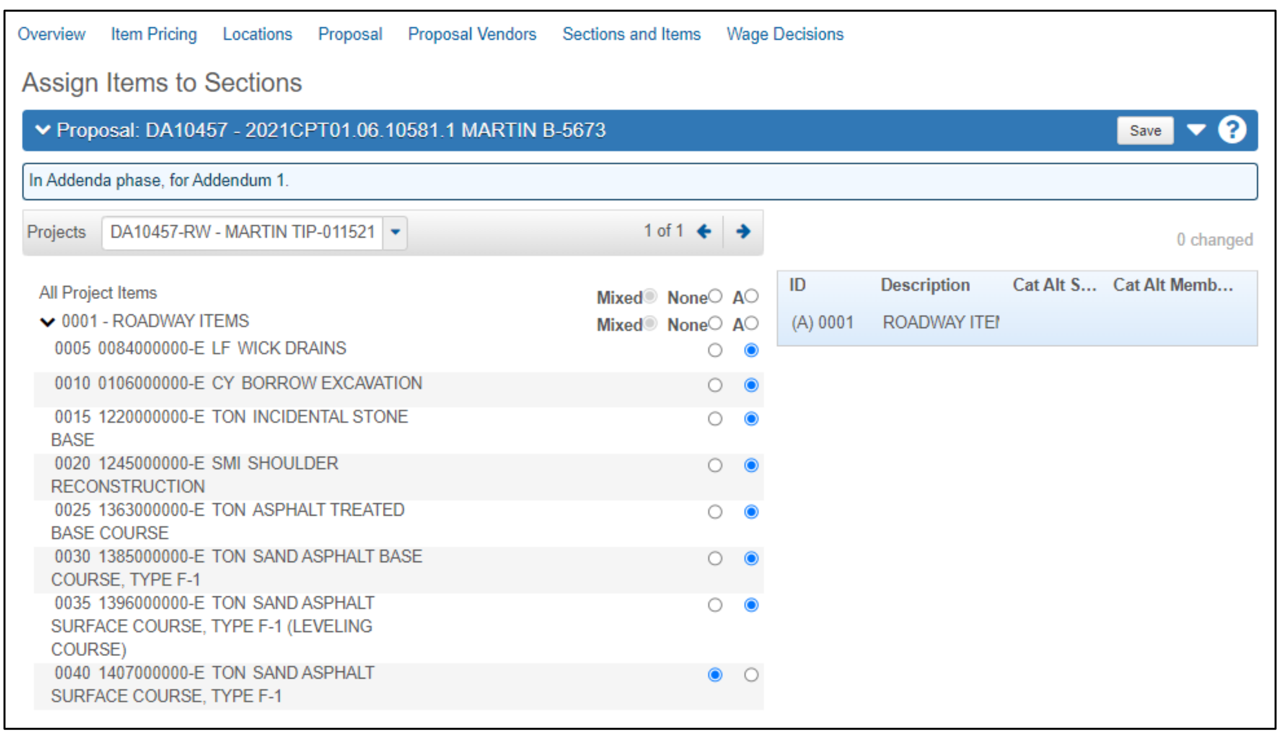
Creating an Addendum for Adding a New Item

(continued)



(*Proposal Sections and Items Page*)

24	From the drop-down arrow at the right side of the **Header Bar** select ***Assign Items to Sections***.	The **Assign Items to Sections** page will appear.

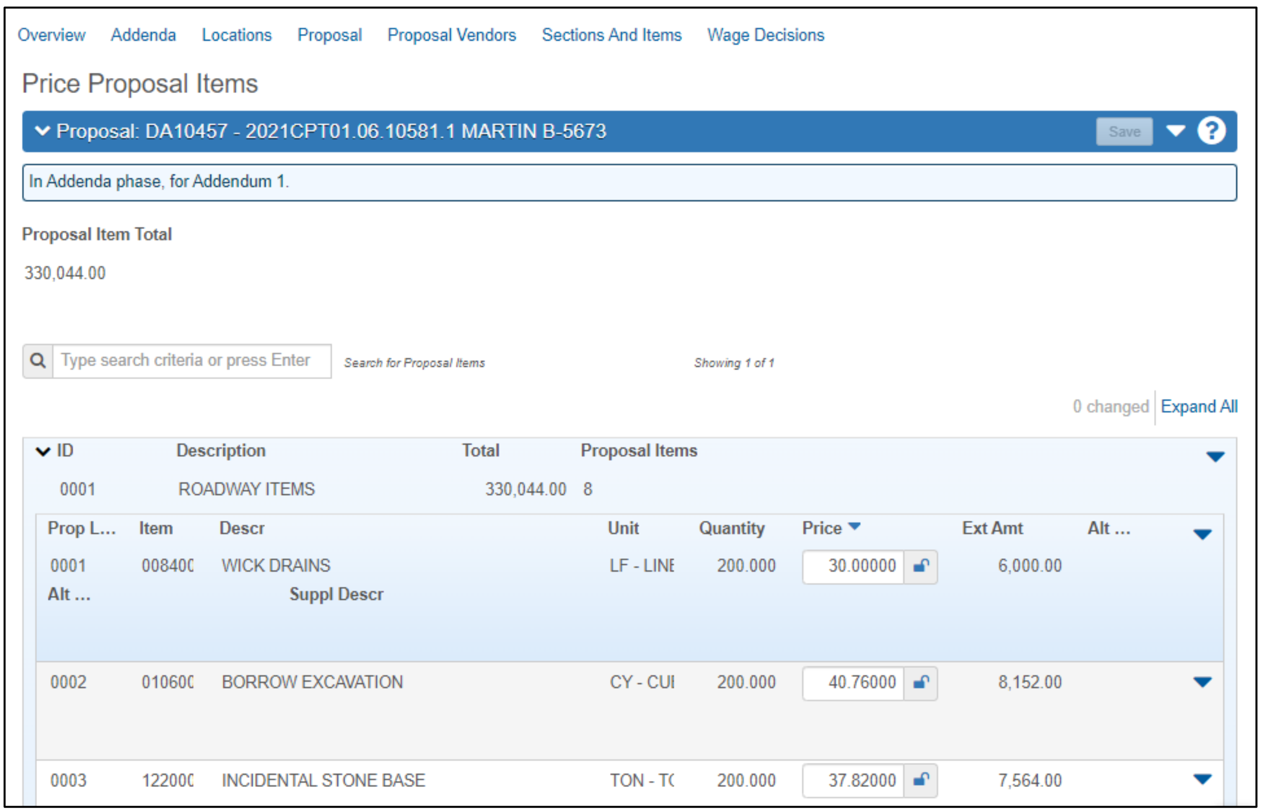


Continued on Following Page

Creating an Addendum for Adding a New Item

(continued)

25	Expand the list of items.	N/A
	The newly added item(s) will not be assigned to a category. They will be marked ***None***.	
26	Assign the item(s) to the appropriate category by clicking the corresponding radio button.	N/A
27	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.
28	Click the **ITEM PRICING** Quick Link.	The **Price Proposal Items** page will appear.



(*Price Proposal Items Page*)

Continued on Following Page

Creating an Addendum for Adding a New Item

(continued)

29	Expand the proposal section by clicking the [>] arrow.	The list of items in the section will appear.
30	Navigate to the newly added item.	N/A
31	Type ***the price of the item*** in the **PRICE** field and [Tab] out of that field.	N/A
32	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Creating an Addendum for Item Modification

If an item in the proposal has been distributed to contractors and needs to be modified, an addendum for item modification should be created and distributed to all proposal/planholders. It will modify the previous addendum item for that proposal line number.

Follow the procedure for **Finding a Proposal** on **Page 4-1**.

From the ***Proposal Summary*** page:

(*Proposal Summary – Workflow Tab*)

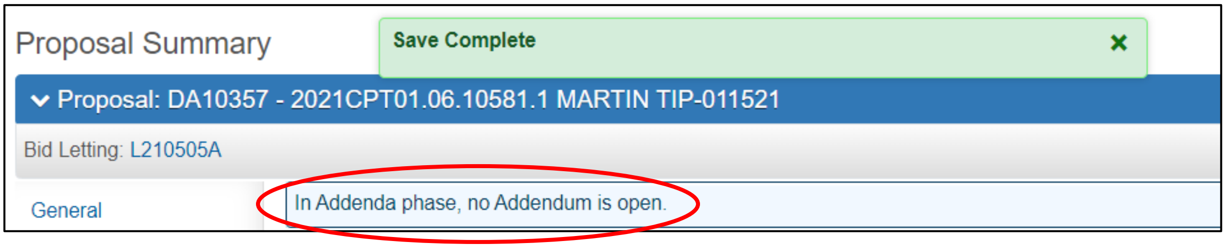
Step	Action	Result
1	On the left side of the page, click on the **Workflow** tab.	The **Workflow** tab will appear.
2	Select ***NCDOT – Division Workflow*** from the drop-down list in the **WORKFLOW** field.	Your selection will appear in the **WORKFLOW** field.
3	Select ***Manage Addenda*** from the drop-down list in the **WORKFLOW PHASE** field.	Your selection will appear in the **WORKFLOW PHASE** field.
4	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

An additional message will appear in blue just beneath the **Header Bar**.

Continued on Following Page

Creating an Addendum for Item Modification

(continued)



5	Click the ***Addenda*** quick link.	The **Addendum Summary** page will appear.

An empty record will appear on the page.

Press the **New** button to add additional records.

6	Type ***MODIFY ITEM*** in the **Description** field. 🗁**NOTE:** The contractors will be able to see this information.	N/A
7	Type ***any comments about the addendum*** in the **Comments** field. 🗁**NOTE:** This information is hidden from contractors.	N/A
8	Click the **Save** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Once the addendum is saved, it will be automatically numbered.

To view items in the proposal, click the **Proposal Items** tab.

Since you are changing an existing item, you will be able to get the line number here.

Continued on Following Page

Creating an Addendum for Item Modification

(continued)

From the **Proposal Summary** page:

9	Click on the **Projects** tab.	The **Projects** tab will appear.
10	Click on ***the project containing the items you wish to modify***.	The **Project Summary** page will appear.
11	Click the ***Item Worksheet*** Quick Link	The **Project Item Worksheet** page will appear.
12	On the row containing the item, double-click in the field that needs to be modified.	N/A
13	Edit the contents of the field.	N/A

Repeat steps **12 & 13** for each additional field that requires modification.

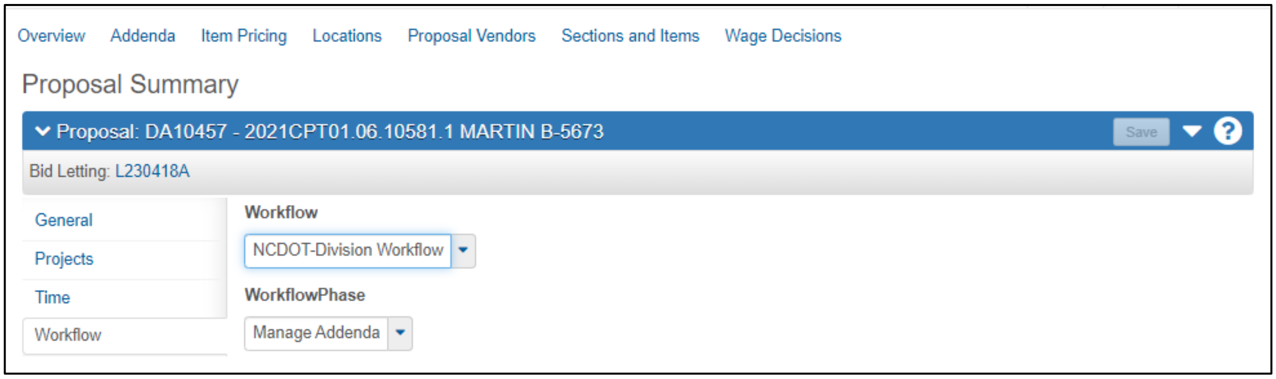
14	Click the SAVE button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Creating an Addendum for Item Removal

If an item in the proposal has been distributed to contractors and needs to be removed, an addendum for item removal should be created and distributed to all proposal planholders. It will remove the previous addendum item for that proposal line number.

Follow the procedure for **Finding a Proposal** on **Page 4-1**.

From the ***Proposal Summary*** page:



(*Proposal Summary – Workflow Tab*)

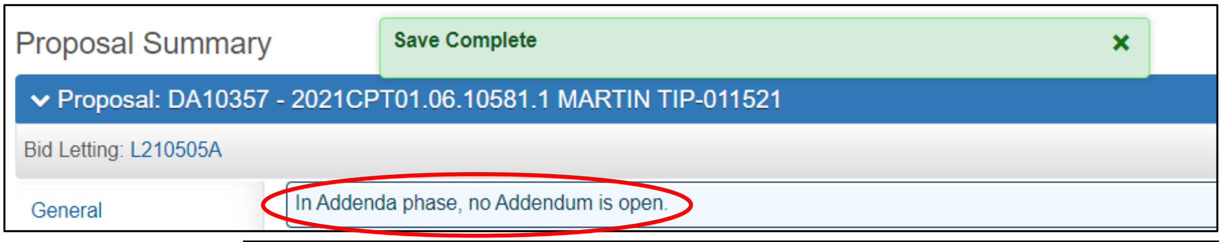
Step	Action	Result
1	On the left side of the page, click on the **Workflow** tab.	The **Workflow** tab will appear.
2	Select ***NCDOT – Division Workflow*** from the drop-down list in the **Workflow** field.	Your selection will appear in the **Workflow** field.
3	Select ***Manage Addenda*** from the drop-down list in the **Workflow Phase** field.	Your selection will appear in the **Workflow Phase** field.
4	Click the **Save** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Continued on Following Page

Creating an Addendum for Item Removal

(continued)

An additional message will appear in blue just beneath the Header bar.



5	Click the ***Addenda*** quick link.	The **Addendum Summary** page will appear.

An empty record will appear on the page.

Press the **New** button to add additional records.

6	Type ***REMOVE ITEM*** in the **Description** field. 🗁**NOTE:** The contractors will be able to see this information.	N/A
7	Type ***any comments about the addendum*** in the **Comments** field. 🗁**NOTE:** This information is hidden from contractors.	N/A
8	Click the **Save** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Once the addendum is saved, it will be automatically numbered.

Continued on Following Page

Creating an Addendum for Item Removal

(continued)

9	Click the ***Proposal*** Quick Link.	The **Proposal Summary** page will appear.
10	Click on the **Projects** tab.	The **Projects** tab will appear.
11	Click on ***the project containing item(s) you wish to remove***.	The **Project Summary** page will appear.
12	Click the ***Item Worksheet*** Quick Link.	The **Project Item Worksheet** page will appear.
13	At the right side of the row containing the item you wish to delete, click the drop-down arrow.	A menu will appear.

14	Click the trash can icon (***Delete)*** on the drop-down menu.	The row will appear greyed out.
15	Click the SAVE button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar** and the item will be deleted.

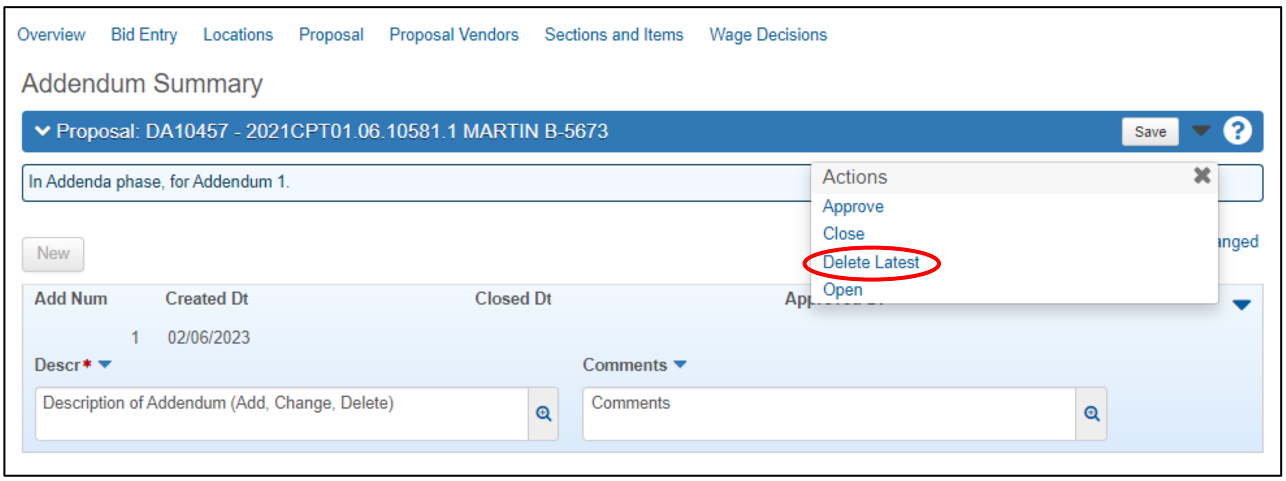
Deleting an Addendum

Follow the procedure for **Finding a Proposal** on **Page 4-1**.

From the ***Proposal Summary*** page:

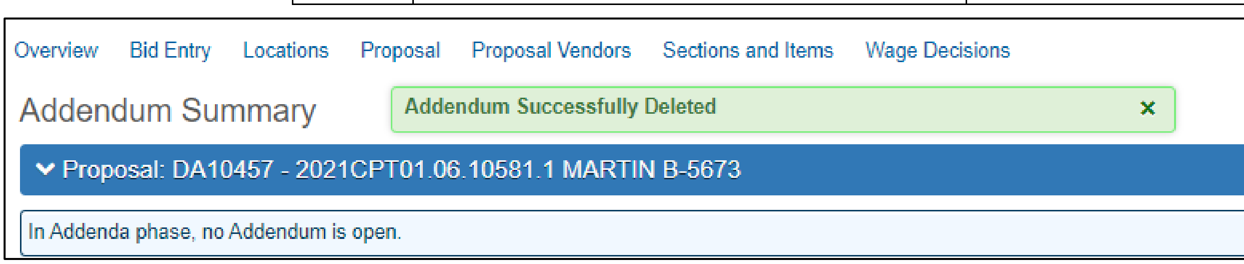
(*Proposal Summary – Quick Links*)

Step	Action	Result
1	Click the ***Addenda*** Quick Link at the top of the page.	The **Addendum Summary** page will appear.



(*Addendum Summary Page*)

2	From the drop-down arrow at the right side of the **Header Bar** select ***Delete Latest***.	An ***Addendum Successfully Deleted*** message will appear above the **Header Bar**.



Continued on Following Page

Deleting an Addendum

(continued)

Deleting an Addendum will automatically switch into the Addenda Workflow Phase.

3	Click the ***Proposal*** Quick Link at the top of the page.	The **Proposal Summary** page will appear.
4	On the left side of the page, click on the **Workflow** tab.	The **Workflow** tab will appear.
5	Select ***NCDOT – Division Workflow*** from the drop-down list in the **WORKFLOW** field.	Your selection will appear in the **WORKFLOW** field.
6	Select ***Process Bids*** from the drop-down list in the **WORKFLOW PHASE** field.	Your selection will appear in the **WORKFLOW PHASE** field.
7	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Closing & Approving an Addendum

Once you have made all the changes you are submitting in the addendum, you need to close it.

Follow the procedure for **Finding a Proposal** on **Page 4-1**.

From the ***Proposal Summary*** page:

Step	Action	Result
1	Click the ***Addenda*** Quick Link at the top of the page.	The **Addendum Summary** page will appear.
2	From the drop-down arrow at the right side of the **Header Bar** select ***Approve***.	The addenda will be closed and approved. The current date will appear in the **CLOSED DT** and **APPROVED DT** fields.

Once the addendum has been closed, you will need to go back and reset the Workflow to get out of the Addenda Phase.

3	Click the ***Proposal*** Quick Link at the top of the page.	The **Proposal Summary** page will appear.
4	On the left side of the page, click on the **Workflow** tab.	The **Workflow** tab will appear.
5	Select ***NCDOT – Division Workflow*** from the drop-down list in the **WORKFLOW** field.	Your selection will appear in the **WORKFLOW** field.
6	Select ***Process Bids*** from the drop-down list in the **WORKFLOW PHASE** field.	Your selection will appear in the **WORKFLOW PHASE** field.

Continued on Following Page

Closing & Approving an Addendum

(continued)

7	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

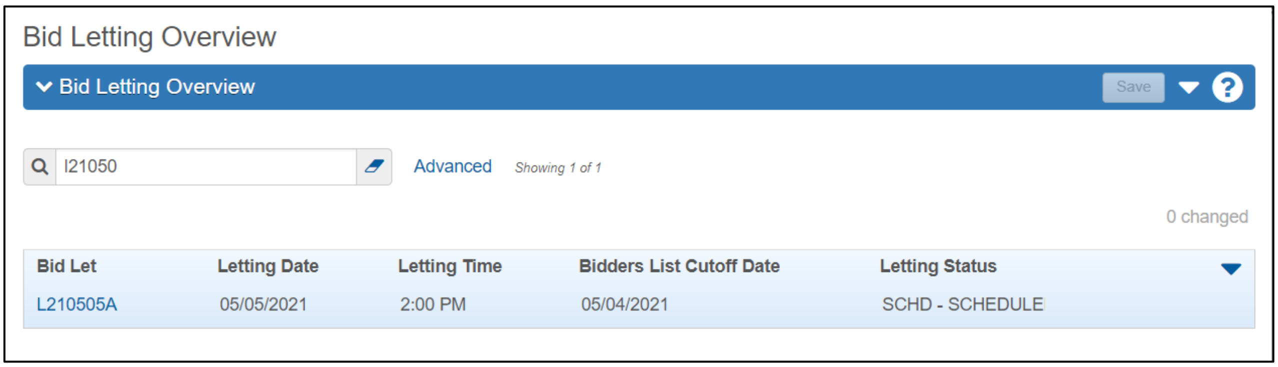
The blue Addenda message just beneath the **Header bar** will disappear because you are no longer in Addenda Phase.

Completing the Addenda Process

After the addenda have been prepared, you are ready to distribute these changes to the contractors. This process will be the same as creating the EBSX file. The only difference is that the files created will have the addendum number as their extension.

From the ***AASHTOWare Project Dashboard***:

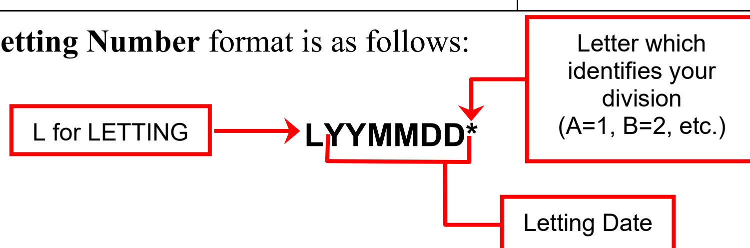
Step	Action	Result
1	Click on ***Lettings***.	The **Bid Letting Overview** page will appear.



Step	Action	Result
2	Type ***the letting number*** in the search filter. The results will auto filter as you type.	The letting will appear in the results.

Letting Number Format

Letting Number format is as follows:



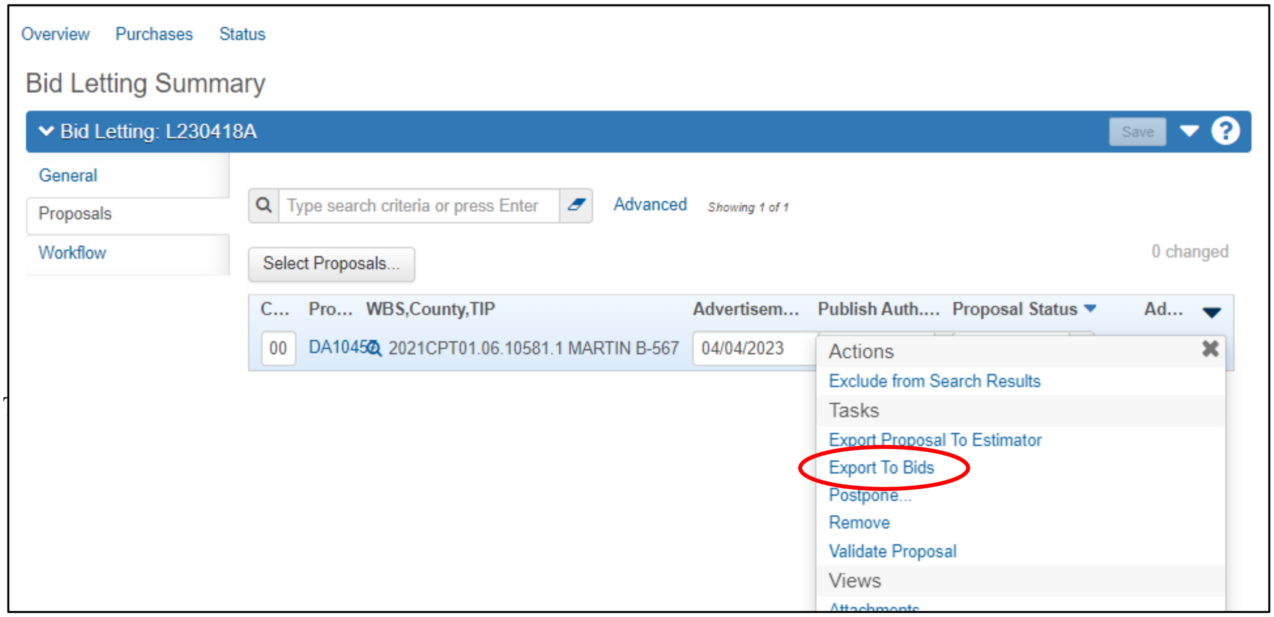
Step	Action	Result
3	Click on the **LETTING NUMBER** you wish to open.	The **Bid Letting Summary** page will appear.

Continued on Following Page

Completing the Addenda Process

(continued)

4	Click on the **Proposals** tab.	The **Proposals** tab will appear.



(*Letting Proposals Tab*)

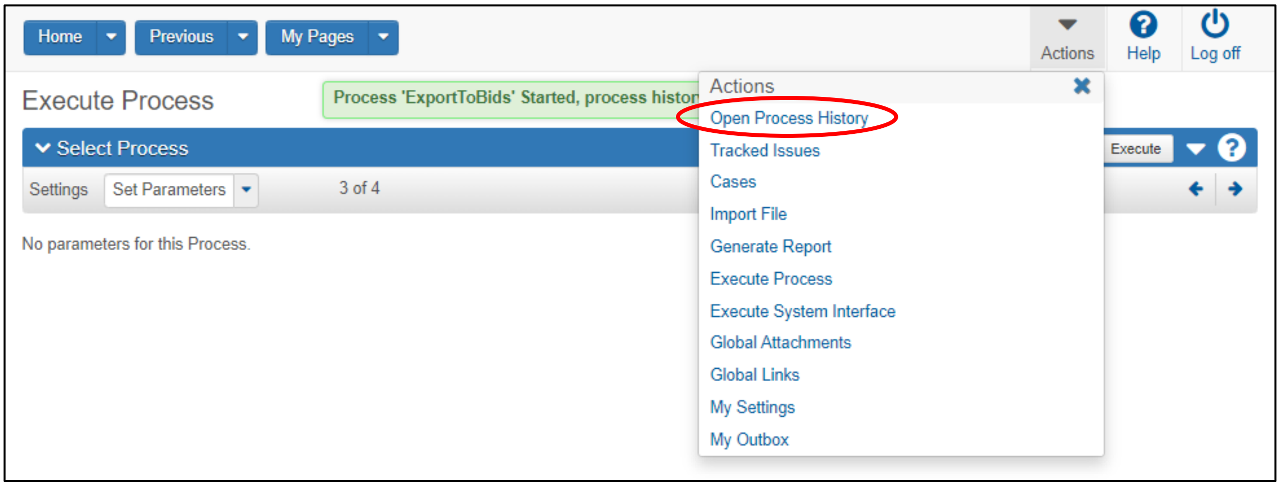
5	From the drop-down arrow at the right side of the **row containing the Proposal which contains the addenda** select ***Export To Bids***.	The **Execute Process** page will appear.
6	Click the **EXECUTE** button.	This will launch the process.

Continued on Following Page

Completing the Addenda Process

(continued)

Now you'll need to go to the **Process History** page to see if the process was successful.



Checking the Status of the EBSX File

7	From the ACTIONS menu at the top of the window, select ***Open Process History***.	The **Process History Overview** page will appear.
8	Locate the process you have just executed. 🗁**NOTE:** Processes will be displayed with the most recent at the top of the page. Currently running processes will appear at the bottom until they have finished running.	

There are 3 files that will be generated. These are:

Pass2ebs.txt	This is the file needed to generate the EBSX file.
Export.log	The only purpose of this file is to let you know if the export has completed successfully.
Error.log	This file will list any errors found during the export process.

🗁**NOTE:** The **Export.log** and **Error.log** files are for information only.

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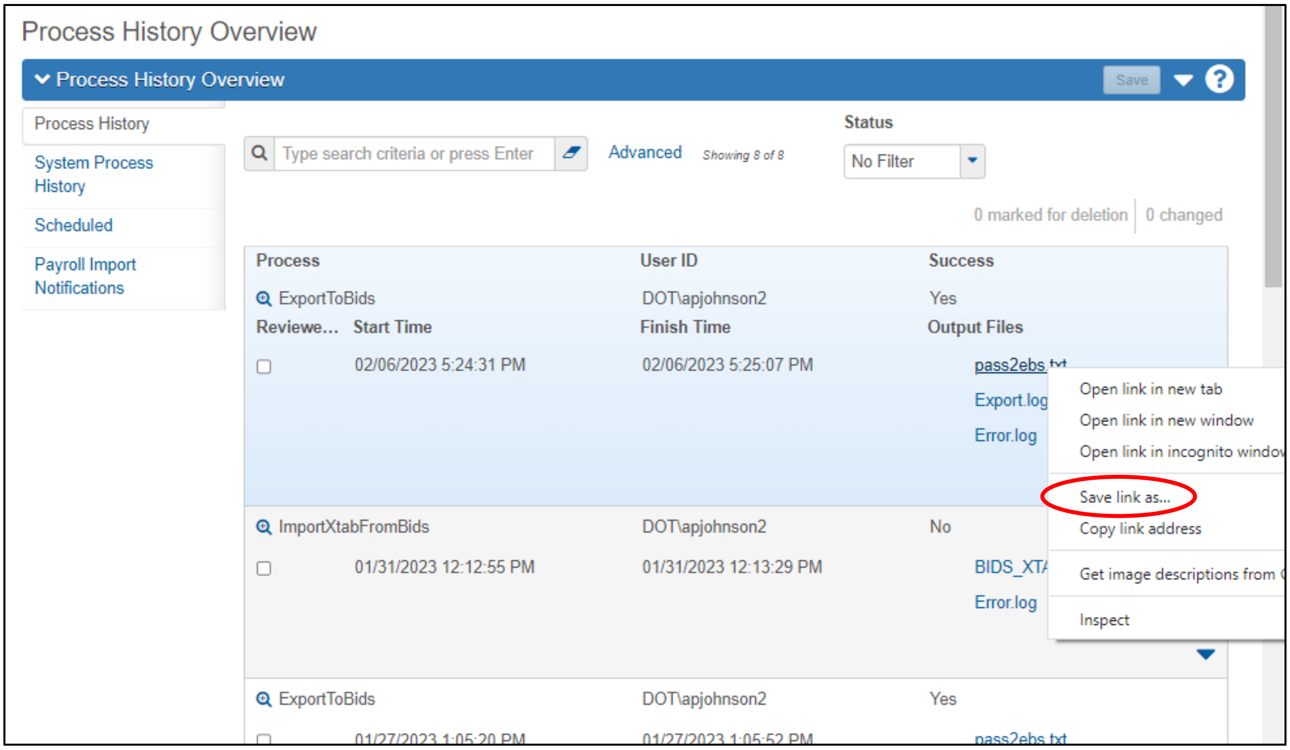
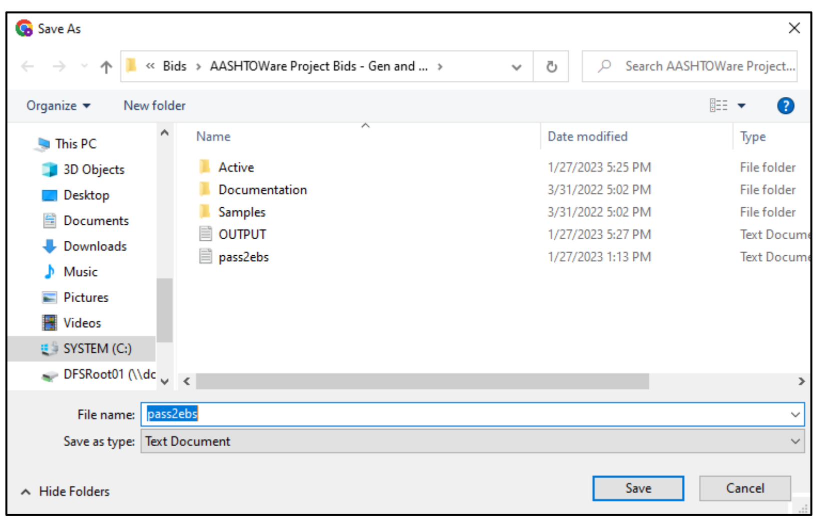
Completing the Addenda Process

(continued)



9	In the **Output Files** section, right-click on the **pass2ebs.txt** file.	A right-click menu will appear.
10	Select ***Save link as…*** from the drop-down menu.	The **Save As** dialog will appear.



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Completing the Addenda Process

(continued)

11	In the **Save As** dialog, navigate to **C:\Bids\AASHTOWare Project Bids – Gen and Load**. 🗁**NOTE:** If you have **Project Bid Entry** installed on our computer, you will have this directory by default.	N/A
12	Click the SAVE button. 🗁**NOTE:** Do not change the file name.	The **pass2ebs.txt** file will be saved to your **C:\Bids\AASHTOWare Project Bids – Gen and Load** directory.

If the **C:\Bids\AASHTOWare Project Bids – Gen and Load** directory already contains a Pass2ebs.txt file, either delete it or overwrite it.

When you are finished working with the files on the **Process History Overview** page, you can delete them by following the procedure for **Deleting a Process** on **Page 13-1**.

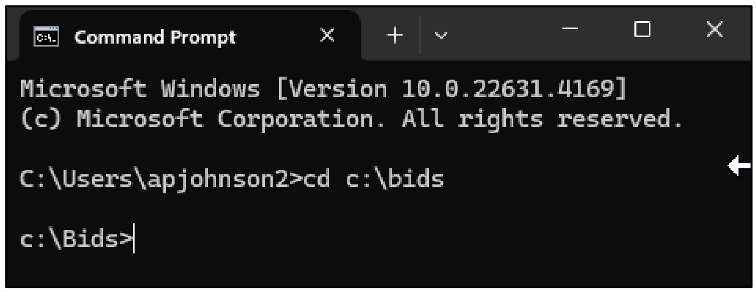
Continued on Following Page

Completing the Addenda Process

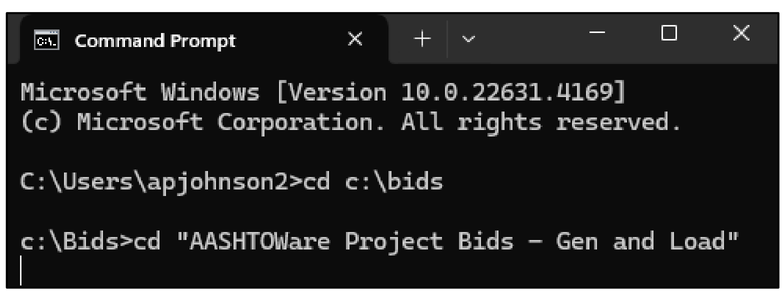
(continued)

Command Prompt

13	At this point you will open the **command prompt** window. 🗁**NOTE:** If it is not listed in a menu or a shortcut, type command in the **Windows search box** in your **taskbar**. It should appear first.	The **Command Prompt** window will appear.



14	Type **cd c:\bids** and press the Enter key.	You've changed the current directory to **c:\Bids**.
15	Type **cd a** and press Tab. **(Not Enter)**	The first directory beginning with A will be displayed
16	Continue to press Tab until the **AASHTOWare Project Bids – Gen and Load** directory is displayed in the command prompt.	



17	Press Enter. The directory will change to **c:\Bids\AASHTOWare Project Bids – Gen and Load.**	You've changed the current directory to **c:\Bids\AASHTOWare Project Bids – Gen and Load**.

Continued on Following Page

Completing the Addenda Process

(continued)

18	Type **gen** and press Enter.	The **generate** process will run.

The file created by this process will have the following format:

Addendum Number

DE00268.001X

Proposal Number

19	Close the **Command Prompt** window.	You have successfully created the addendum ***.EBSX** File.

🗁**NOTE:** The original .ebsx file created at advertisement along with any previous addendum files must be in your current working directory **C:\Bids\AASHTOWare Project Bids – Gen and Load**.

IMPORTANT!

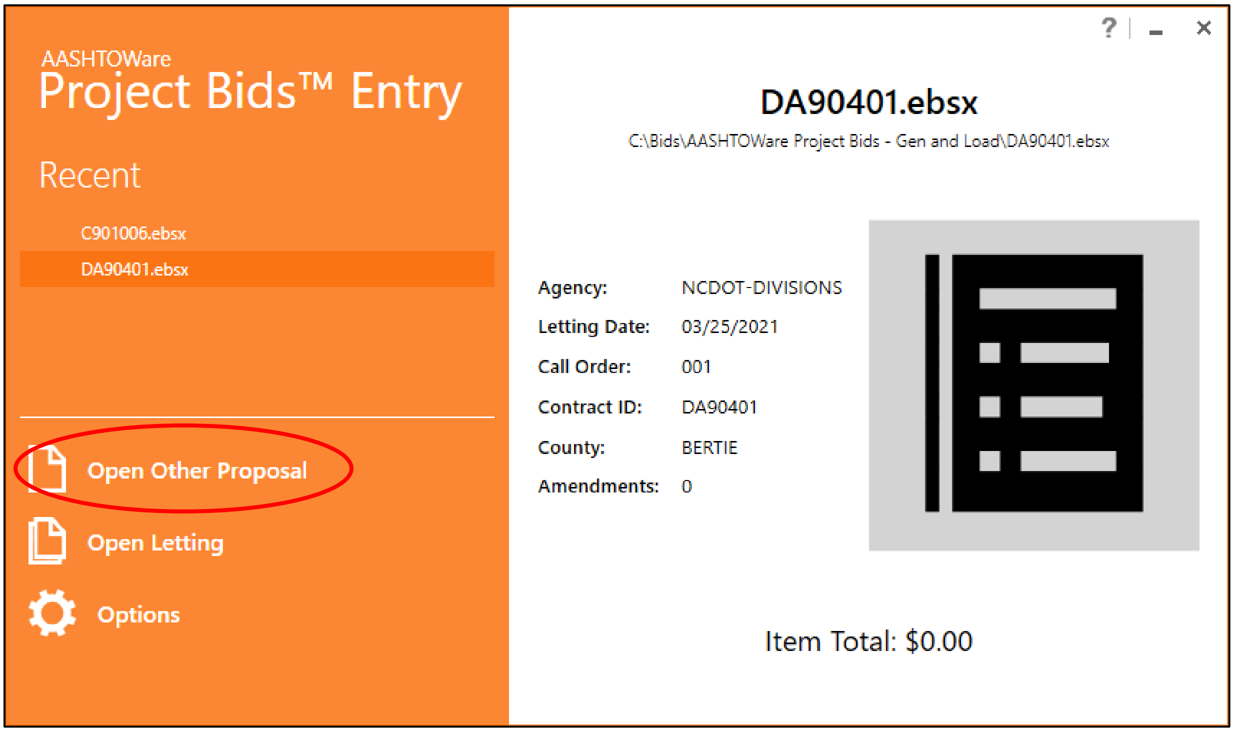
DO NOT move any ***.EBSX** files until after your letting date.

Once the letting is complete, copies should be archived.

20	Copy this Addendum file and upload it for the contractors. 🗁**NOTE:** Do **NOT** give them the complete **.EBSX** file again.	
21	To apply the new file, the contractors must be instructed to load their copy of the original **.EBSX** file into the **Project Bids Bid** application.	N/A

Applying an Addendum in Project Bids Entry

Step	Action	Result
1	Launch the **Project Bids Entry** Application.	The **Project Bids Entry** window will appear.



(*Project Bids Entry Window*)

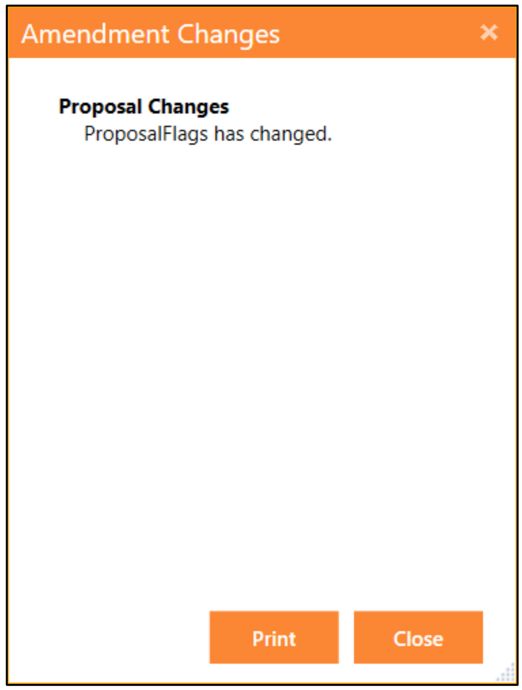
2	From the home page, select **OPEN OTHER PROPOSAL.**	A dialog will appear that will prompt you to open an **.EBSX** file.
3	Navigate to the **C:\Bids\AASHTOWare Project Bids – Gen and Load)** directory.	N/A
4	Click on the **.EBSX** file you would like to open.	N/A

Continued on Following Page

Applying an Addendum in Project Bids Entry

(continued)

5	Click the **OPEN** button.	If the addendum file is in the same folder as the .EBSX file, the **Amendment Changes** panel will appear.



If the addendum file is in the same folder as the .EBSX file, it will be applied automatically when the .EBSX file is opened.

If this is the case, you **will not** need to perform **steps 13-16**.

6	Click the **CLOSE** button.	The Amendment Changes dialog will close, and the **Options** panel will appear.

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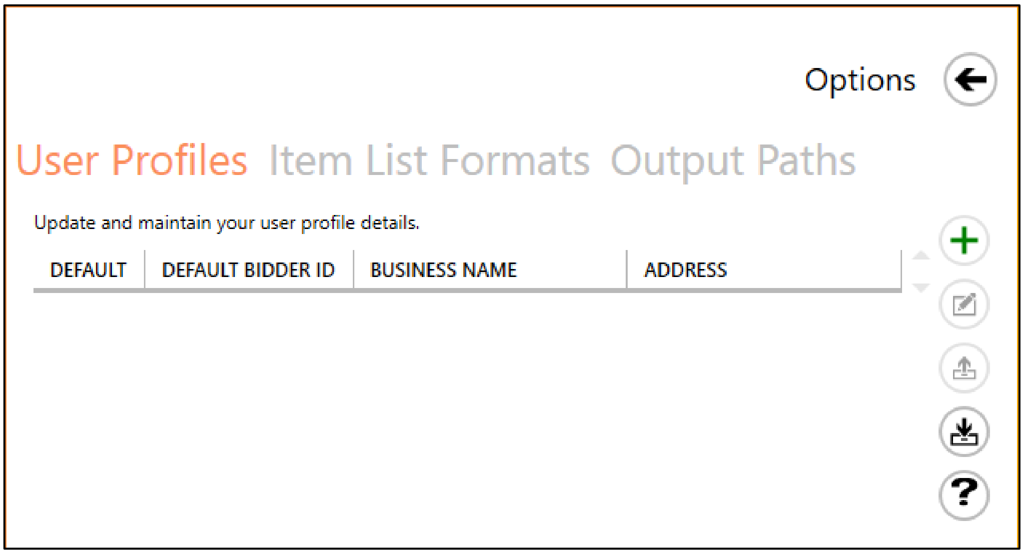
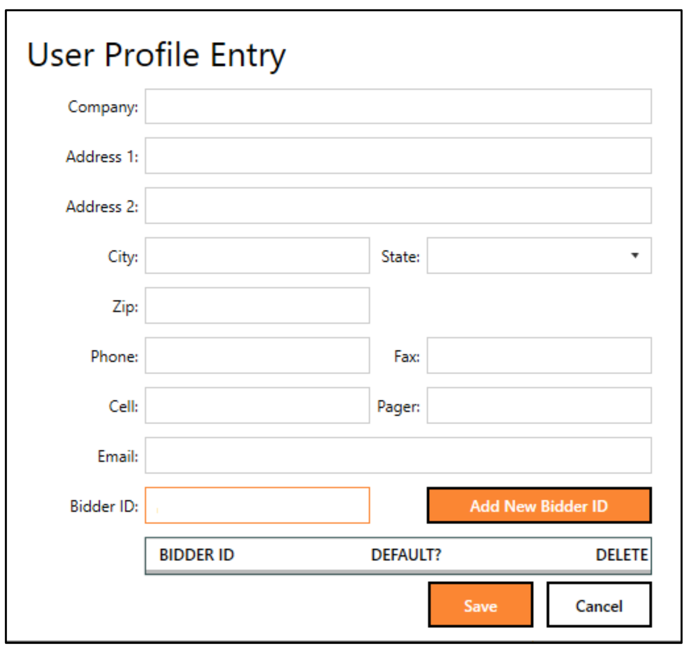
Applying an Addendum in Project Bids Entry

(continued)



7	Click the button.	The **User Profile Entry** dialog will appear.



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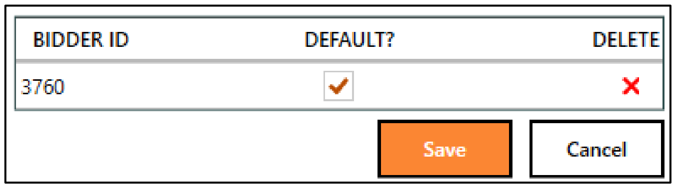
Applying an Addendum in Project Bids Entry

(continued)

8	Type ***the bidder ID number of the contractor*** in the **BIDDER ID** field.	N/A
9	Click **Add New Bidder ID**.	The bidder will appear in the list



10	Click the **SAVE** button.	N/A

11	Click the **OPTIONS** arrow to hide the panel.	The proposal information will appear.

IMPORTANT!

When an **.EBSX** file is re-opened, the DBE information will not be visible.

Do not re-enter this information.

Although it cannot be seen, it has been saved with the bid.

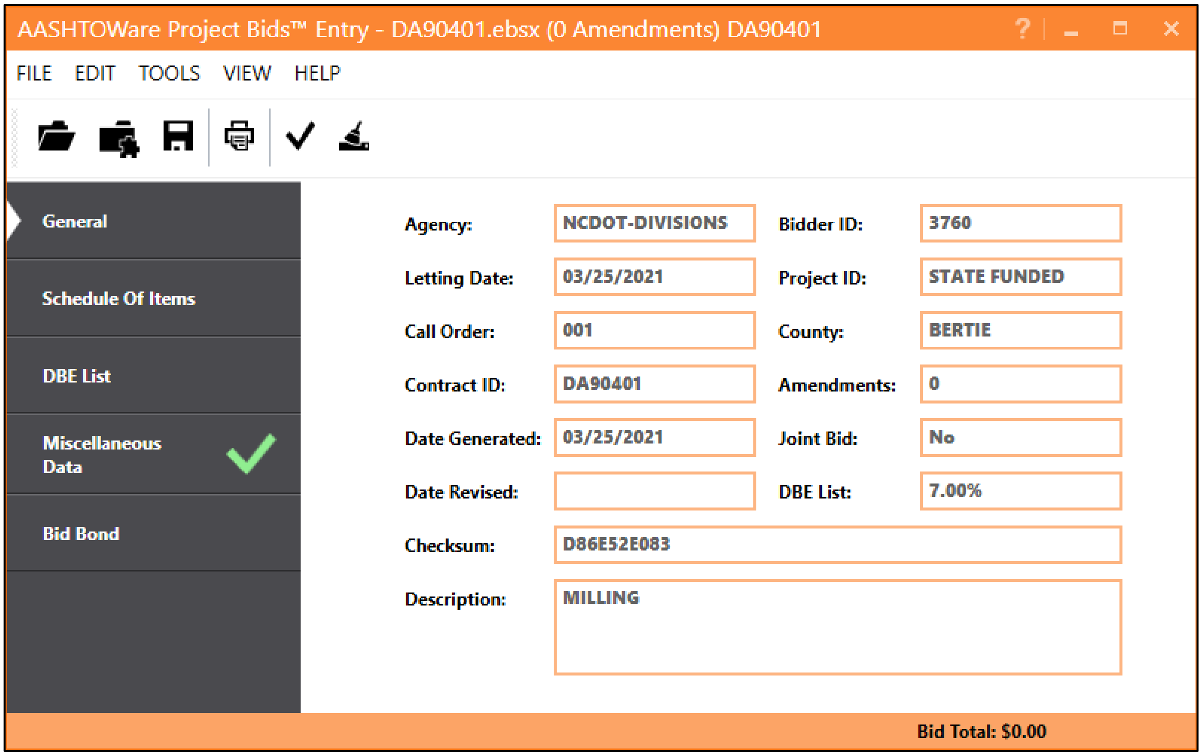
12	Save your information by clicking the save  button.

The contractors will need to make changes to their bids accordingly.

Continued on Following Page

Applying an Addendum in Project Bids Entry

(continued)



The addenda items will be made available to the contractors via the Internet. In addition, **new hardcopy proposal sheets will be printed and sent to each contractor.**

🗁**NOTE:** Whenever you create an addendum file, open it in Project Bids Bid to make sure it will work properly when the contractor receives it.

🗁**NOTE:** Don't move files from the **Gen** directory until a letting is complete. Make copies if you need them to be portable, but the original should remain until the letting is over. Once the letting is complete, copies should be archived.

If the addendum file is **NOT** in the same folder as the .EBSX file, you **will** need to perform **steps 13-16**.

Continued on Following Page

Applying an Addendum in Project Bids Entry

(continued)

If the Addendum resides in a different location

13	From the **FILE** menu, select **LOAD AMENDMENT.**	The **Open Amendment** dialog will appear.
14	Navigate to the directory containing the addendum file.	N/A
15	Select ***the Addendum file*** from the list.	N/A
16	Click the **OPEN** button.	The Addendum will be applied.

The contractors will need to make changes to their bids accordingly.

Chapter 11 Letting Day Activities

On letting day, a lot of activities come together simultaneously. Many tasks are required, and they are all included here for informational purposes. The purpose of this chapter is to make sure all steps have been taken to ensure a successful letting.

Processing Hand-Entered Bids with Project Bids Entry

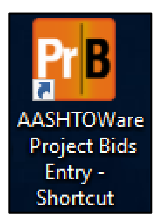
Some contractors prefer to submit their bids in paper form only. These paper bids must be converted into an electronic format that can be combined with the other electronic bids submitted to NCDOT for comparison. The application used for this is called **Project Bids Entry**.

Before any bids can be entered through Project Bids Entry, you ***must*** place all **.EBSX** bid files for the letting on the network so that the person entering this information can access them.

Paper bids entered via the Project Bids Entry application will create a bid file named **XtabDat.DAT** in the **C:\Bids\AASHTOWare Project Bids – Gen and Load** directory of each bid entry operator's PC. Bid files may also be saved to a shared network drive based on division preference. This program allows the entry of bid data from several bidders by differentiating them with different bidder IDs.

IMPORTANT!

Make sure to delete the **XtabDat.dat** and **xdbedat.dat** files from the previous letting **BEFORE** entering bids for a new letting.



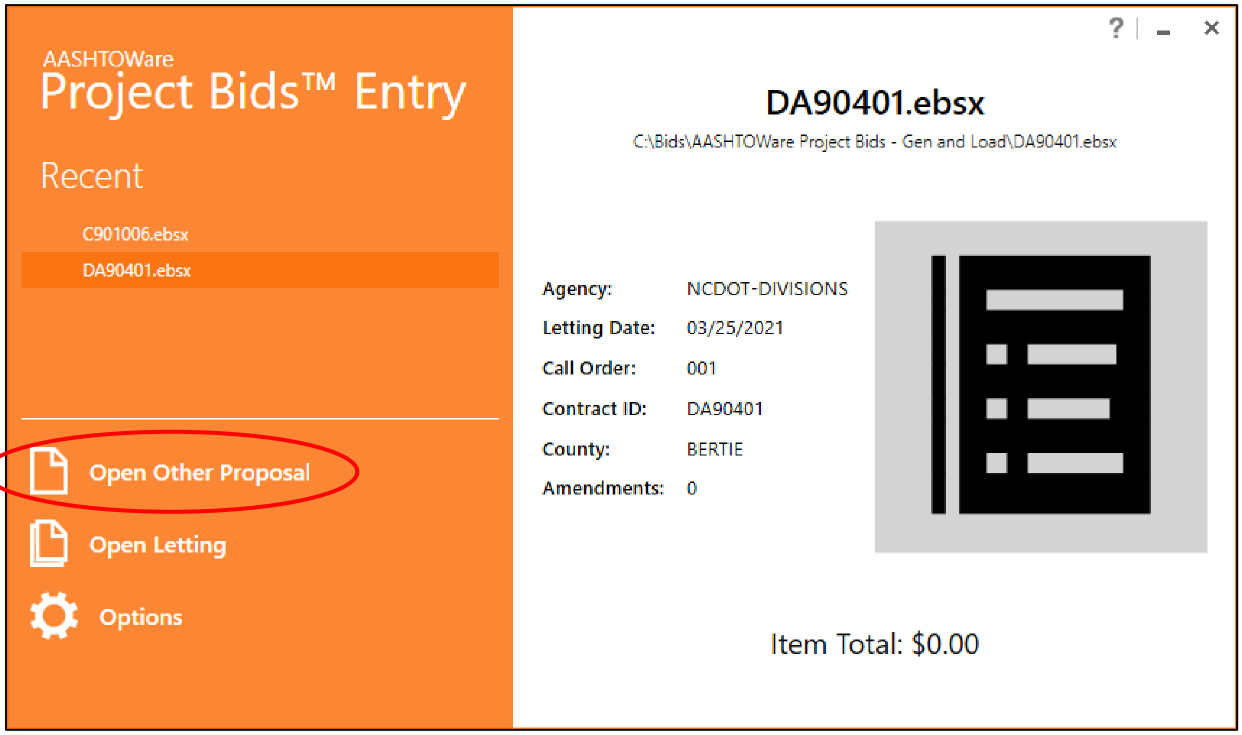
From ***your Desktop***:

Step	Action	Result
1	Double-click the **AASHTOWare Project Bids Entry** icon.	The **Project Bids Entry** application will appear.

Continued on Following Page

Processing Hand-Entered Bids with Project Bids Entry

(continued)



(*Project Bids Entry Main Window*)

2	Click **OPEN OTHER PROPOSAL.**	The **Open Proposal** dialog will appear.
3	Navigate to the **C:\Bids\AASHTOWare Project Bids – Gen and Load)** directory.	N/A

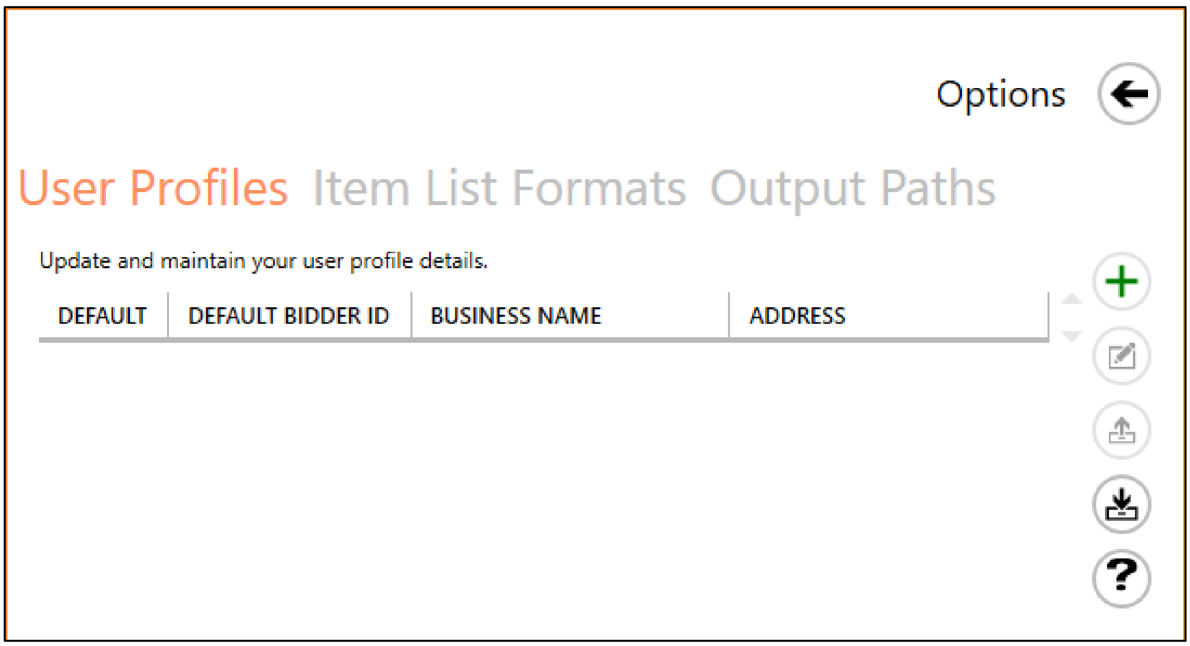
Continued on Following Page

Processing Hand-Entered Bids with Project Bids Entry

(continued)

4	Select the **.EBSX** file for the letting.	N/A
5	Click the **OPEN** button.	The **Options** panel will appear.

🗁**NOTE:** The **Bidder ID** is the **HiCAMS Vendor ID**. This can be found in the **VENDOR OVERVIEW** (in the **REFERENCE DATA** section of AWP) or in the **INTERESTED PARTIES/AUTHORIZED BIDDERS LIST** (from the **LETTING ADMIN DASHBOARD**).



6	Click the  button.	The **User Profile Entry** dialog will appear.

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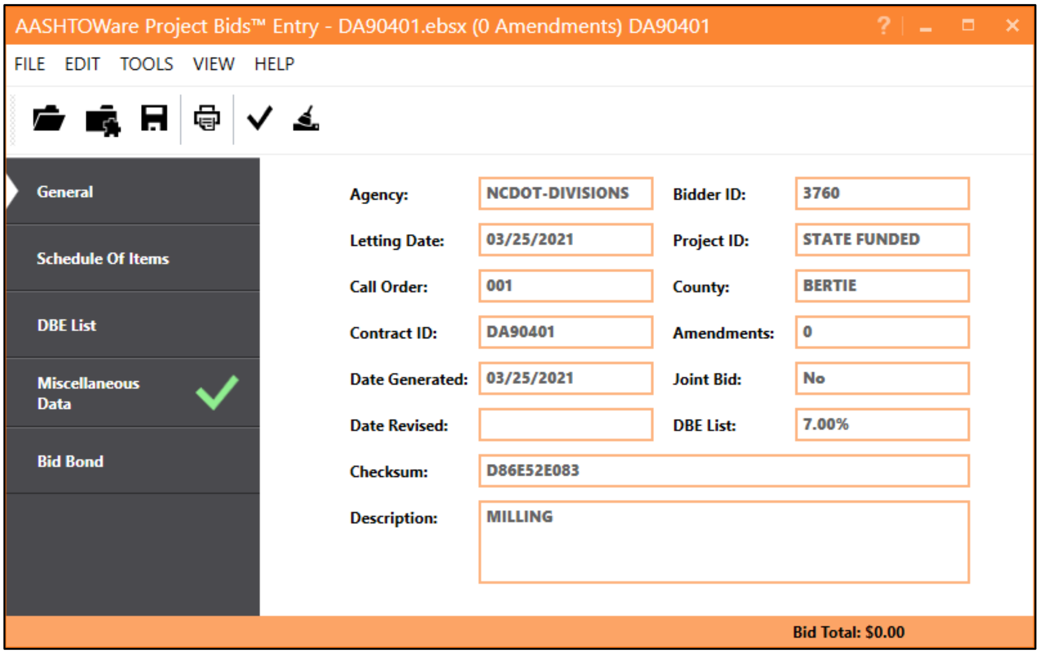
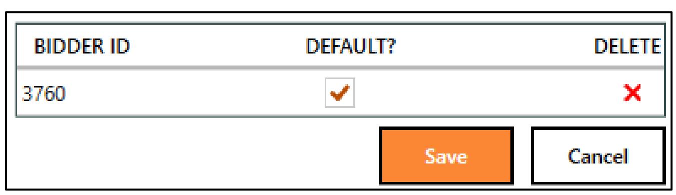
Processing Hand-Entered Bids with Project Bids Entry

(continued)



7	Type ***the bidder ID number of the contractor*** in the **BIDDER ID** field.	N/A
8	Click **Add New Bidder ID**.	The bidder will appear in the list



9	Click the **SAVE** button.	N/A

IMPORTANT!

When an **.EBSX** file is re-opened, the DBE information will not be visible.

Do not re-enter this information.

Although it cannot be seen, it has been saved with the bid.

Continued on Following Page

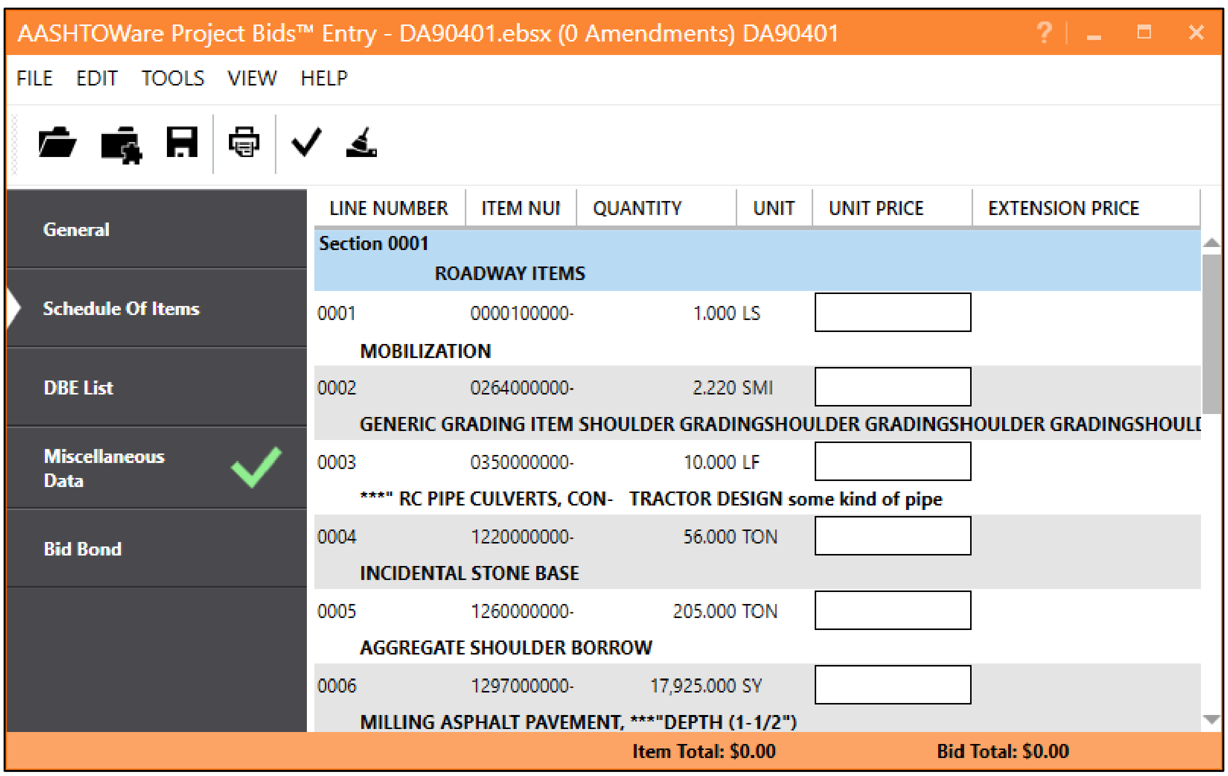
Processing Hand-Entered Bids with Project Bids Entry

(continued)

10	Click the **OPTIONS ARROW** to hide the panel.	The proposal information will appear.

IMPORTANT! Check the **Title Bar** to make sure it indicates that all the amendments (addendum) to the contract are included.

11	Click the **Schedule of Items** tab.	The **Schedule of Items** window will appear.



12	From the paper copy of the bid, type ***the unit price for each line item*** in the **UNIT PRICE** field.	N/A

Continued on Following Page

Processing Hand-Entered Bids with Project Bids Entry

(continued)

13	After all individual unit prices have been entered, make sure the online bid total matches the total of the paper bid.	N/A

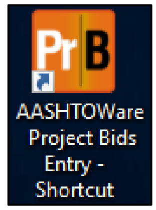
🗁**NOTE:** If you find an error in the contractor's bid, consult ***Section 103: Award and Execution of Contract*** in the **Standard Specification for Roads and Structures** (Spec Book).

14	Click the **SAVE** button. 🗁**NOTE:** You will be able to save at any time. You don't need to wait until the end. This will ensure that you don't lose any work to system outages, etc.	The bid has been saved electronically.

The **Xtabdat.dat** file has been created. This file is in the **C:\Bids\AASHTOWare Project Bids – Gen and Load** directory based the directory set in the **Output Paths** page. (See procedure on page **1-18** for **Setting Up AASHTOWare Project Bids Entry**)
Bid files may also be saved to a shared network drive based on division preference.

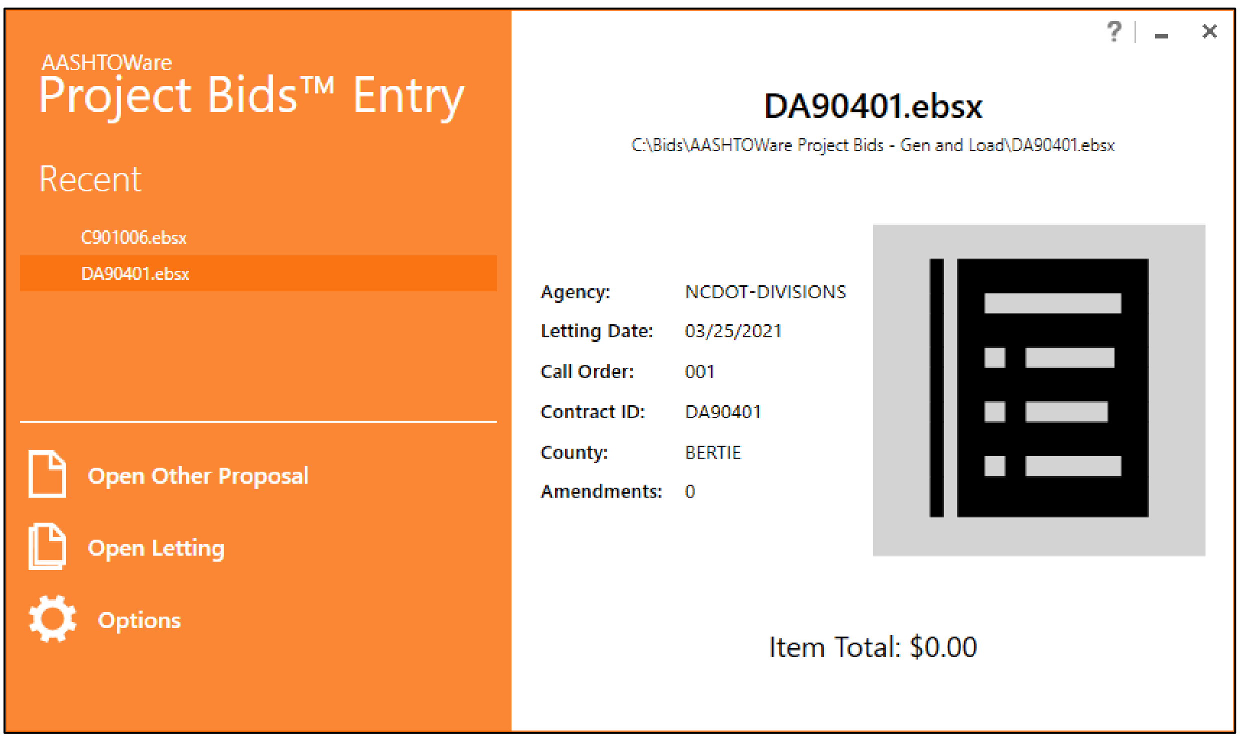
Repeat this procedure if you have more bids to enter.

Adding DBE/MBE/WBE Entries In Project Bids Entry



From ***your Desktop***:

Step	Action	Result
1	Double-click the **AASHTOWare Project Bids Entry** icon.	The **Project Bids Entry** application will appear.



(*Project Bids Entry Main Window*)

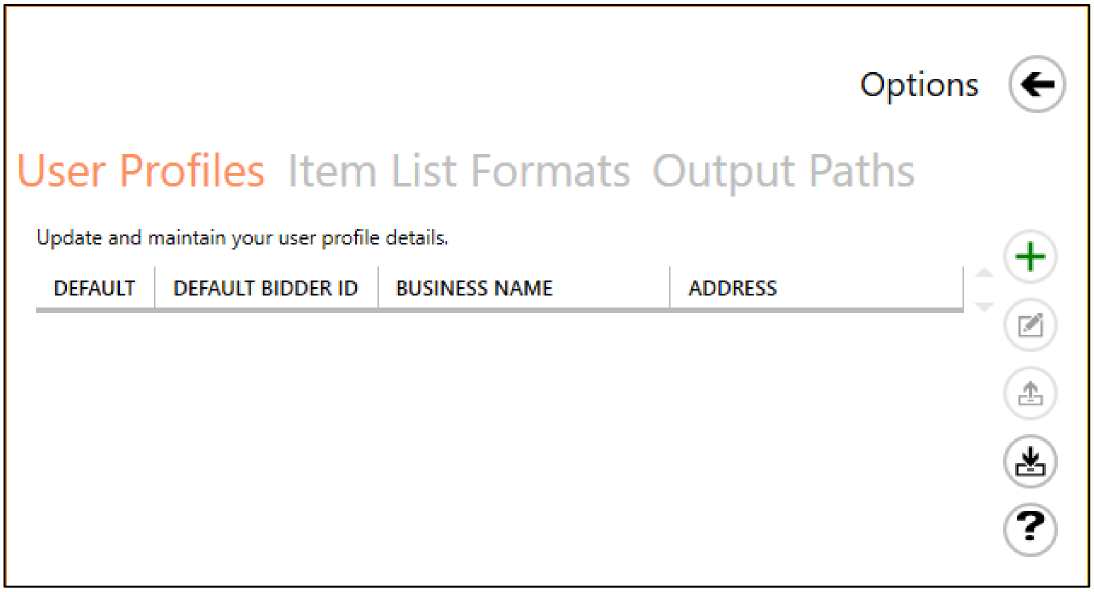
Step	Action	Result
2	Click **OPEN OTHER PROPOSAL**.	The **Open File** dialog will appear.
3	Navigate to the directory containing your **.EBSX** files.	N/A

Continued on Following Page

Adding DBE/MBE/WBE Entries In Project Bids Entry

(continued)

4	Select the proposal **.EBSX** file.	N/A
5	Click the **OPEN** button.	The **Options** panel will appear.



6	Click the  button.	N/A
7	Type ***the bidder ID number of the contractor*** in the **BIDDER ID** field.	N/A

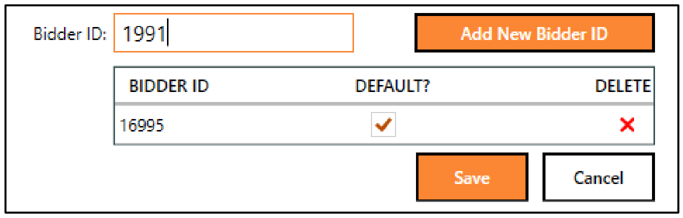
🗁**NOTE:** The **Bidder ID** is the **HiCAMS Vendor ID**. This can be found in the **VENDOR OVERVIEW** (in the **REFERENCE DATA** section of AWP) or in the **INTERESTED PARTIES/AUTHORIZED BIDDERS LIST** (from the **LETTING ADMIN DASHBOARD**).

8	Click the **ADD NEW BIDDER ID** button.	The bidder information will appear at the bottom of the **Options** panel.

Continued on Following Page

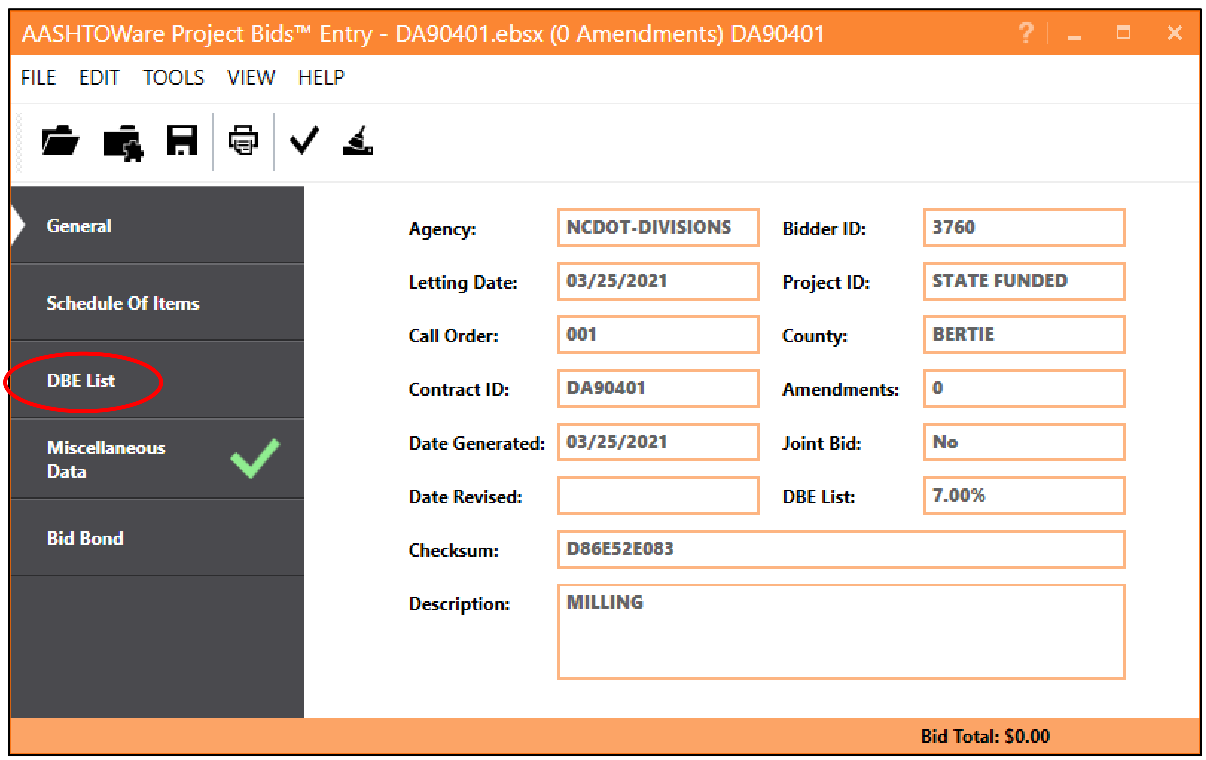
Processing Hand-Entered Bids with Project Bids Entry

(continued)



9	Click the **SAVE** button.	You will return to the **Options** panel. The bidder will be listed at the top.

10	Click the **Options Arrow** to hide the panel.	The proposal will be displayed.



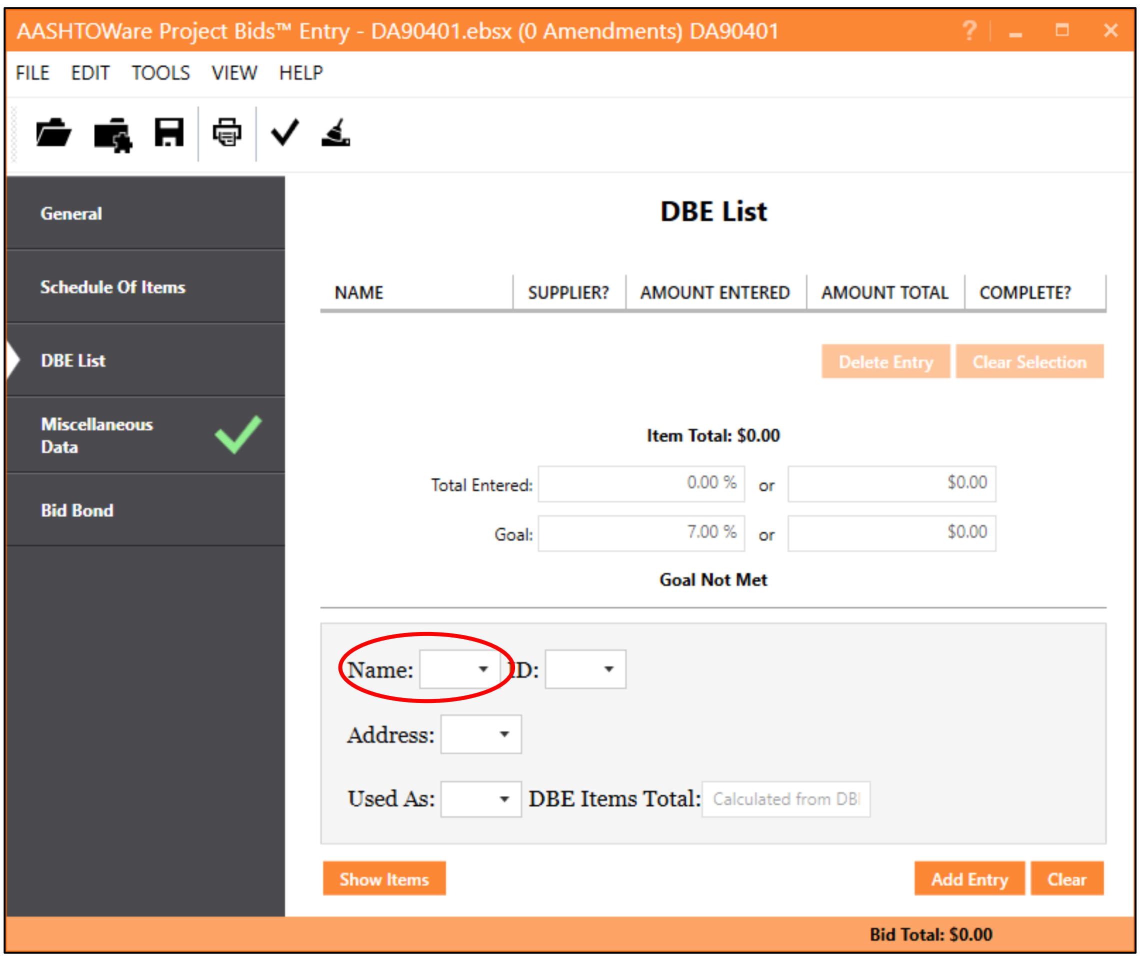
Continued on Following Page

Processing Hand-Entered Bids with Project Bids Entry

(continued)

11	Click the **DBE List**, or **MBE List**, or **WBE List** tab on the left side of the window. 🗁**NOTE:** **All** of these selections will not be available.	The **DBE List**, **MBE List**, or **WBE List** page will appear.

🗁**NOTE:** If you haven't saved the **DBE_NC.BIN** file in the **C:\Bids\AASHTOWare Project Bids – Gen and Load** directory, the vendor list will not contain any information.
The procedure for **Creating the EBSX File for the Letting** is on **Page 8-13**. This is the file you should use.



(*DBE Entry Panel*)

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Adding DBE/MBE/WBE Entries In Project Bids Entry

(continued)

12	Select ***the vendor name*** from the drop-down list in the **NAME** field.	The **ID** and **CITY/STATE** fields will default automatically.
13	Select **Manufacturer**, **Subcontractor**, or **Supplier** from the drop-down list in the **USED AS** field.	N/A
14	Click the **ADD ENTRY** button.	The vendor will be added to the proposal.

Repeat **steps 12-14** to add additional vendors of the same type (DBE, MBE, or WBE).

To add additional vendors of a different type, click on the applicable tab and repeat **steps 11-14**.

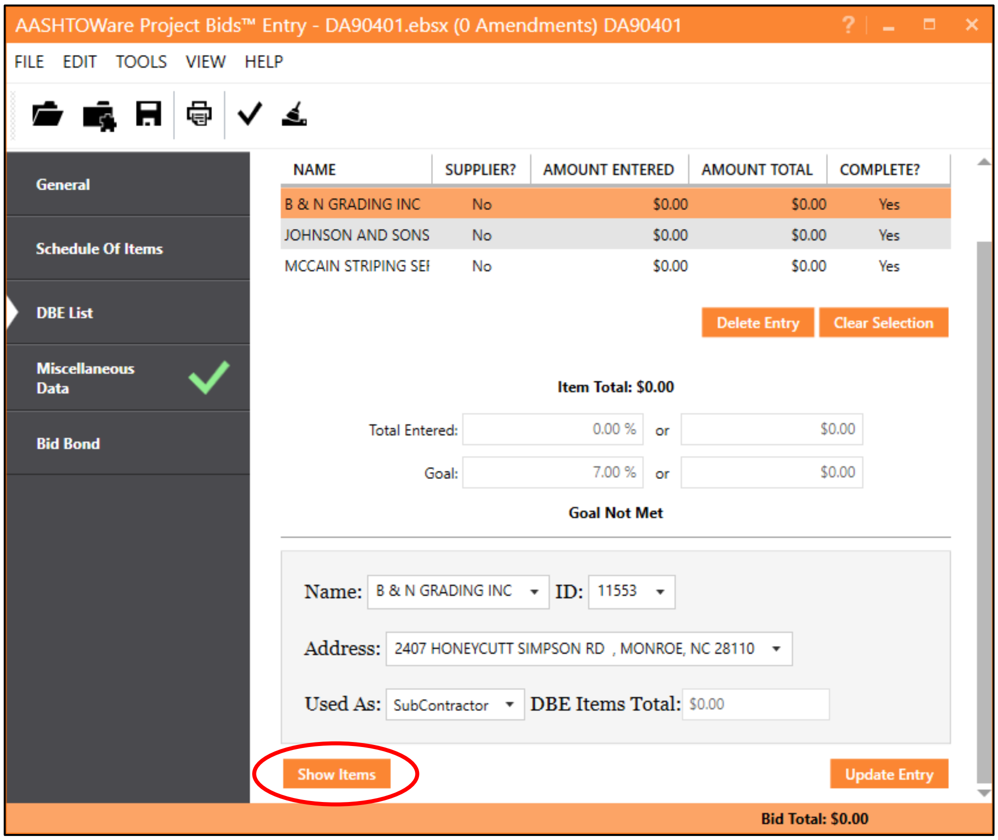
Continued on Following Page

Adding DBE/MBE/WBE Entries In Project Bids Entry

(continued)

To add **DBE**, **MBE**, or **WBE** items:

15	Select a ***vendor*** from the list of vendors at the top of the window.	The applicable vendor will appear highlighted.



16	Click the **Show Items** button at the bottom of the window.	The list of items in the proposal will appear.

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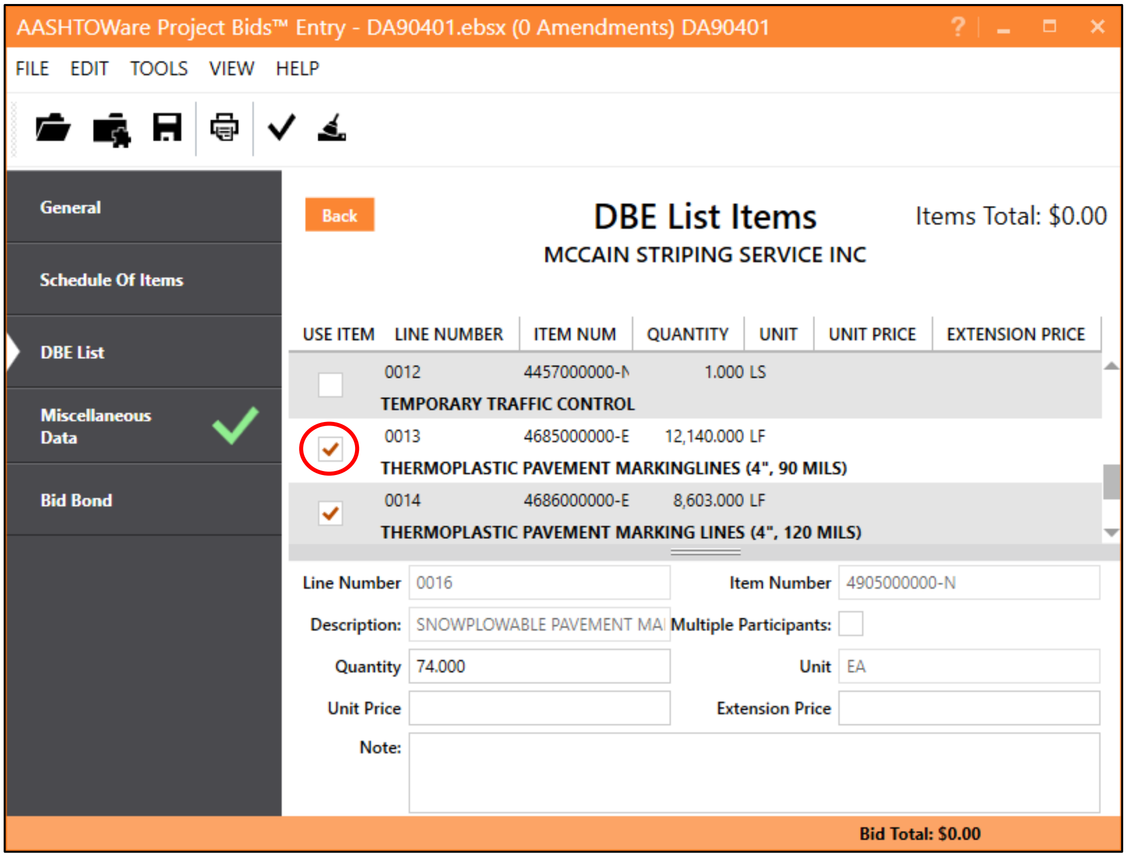
Adding DBE/MBE/WBE Entries In Project Bids Entry

(continued)



17	Select any items associated with the selected vendor by clicking **the checkbox to the left of the item**.	N/A
18	Type ***the price of the item*** in the **UNIT PRICE** field.	The **EXTENSION PRICE** field will default automatically.
19	If applicable, ***type a note*** in the **NOTE** field.	N/A

Continued on Following Page

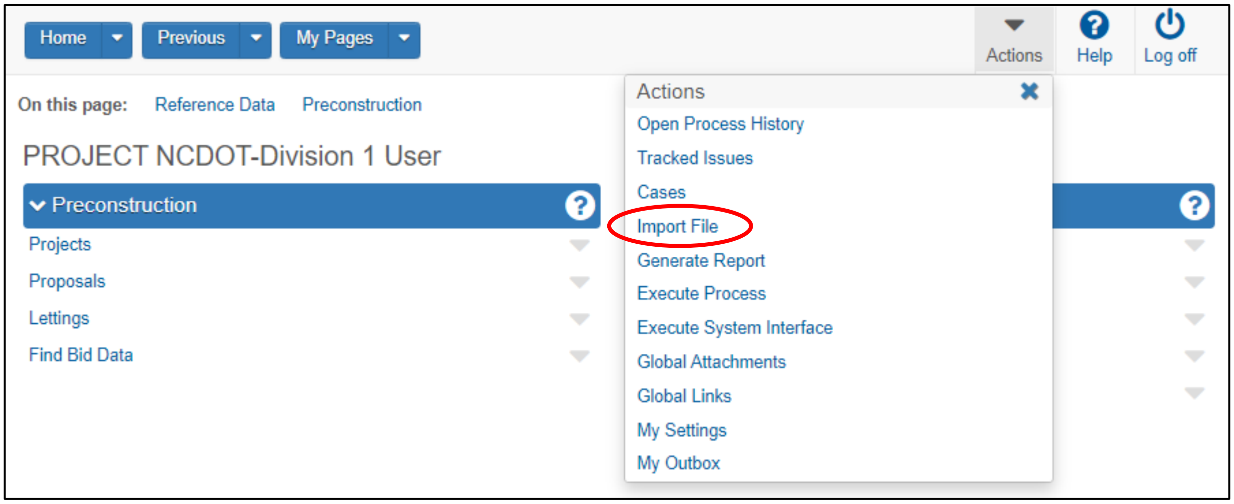
Adding DBE/MBE/WBE Entries In Project Bids Entry

(continued)

20	Click the **SAVE** button.	The new **DBE**, **MBE** or **WBE** records and **Items** will be saved.
21	Click the **BACK** button.	N/A
22	Click the **UPDATE ENTRY** button.	Item and vendor information for the selected vendor has been updated.

Repeat **steps 15 - 22** for additional items.

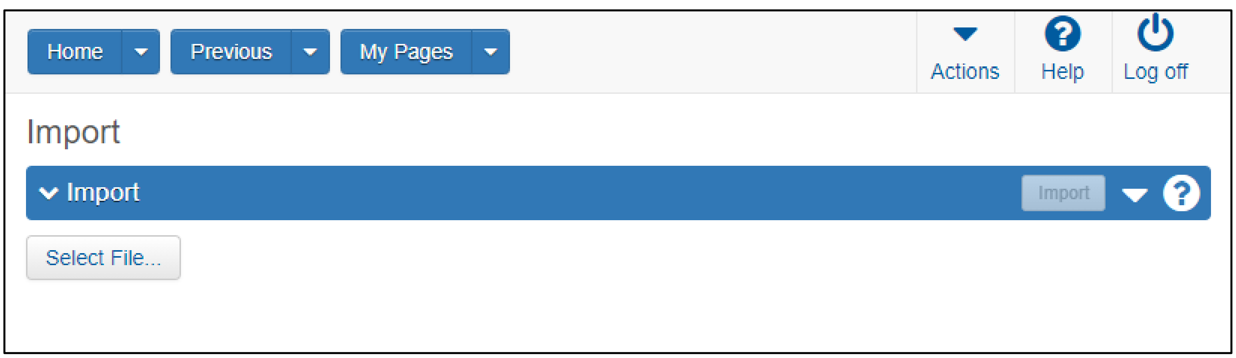
Loading Electronically Submitted Bids



(*AASHTOWare Project Dashboard – Actions Menu*)

From the ***AASHTOWare Project Dashboard***:

Step	Action	Result
1	From the **ACTIONS** menu at the top of the window, select ***Import File***.	The **Import** page will appear.



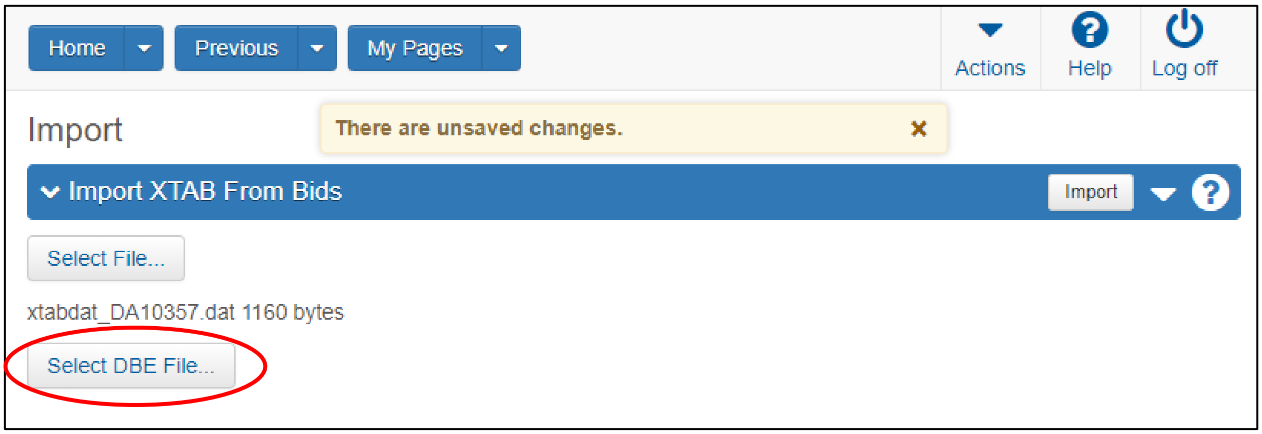
2	Click the **SELECT FILE** button.	A dialog will appear that will prompt you to select the file from the location where you saved it.

Continued on Following Page

Loading Electronically Submitted Bids

(continued)

3	Navigate to the **C:\Bids\AASHTOWare Project Bids – Gen and Load** directory.	N/A
4	Select the **XtabDat.DAT** file and click the **OPEN** button.	The **XtabDat.DAT** file will be imported.

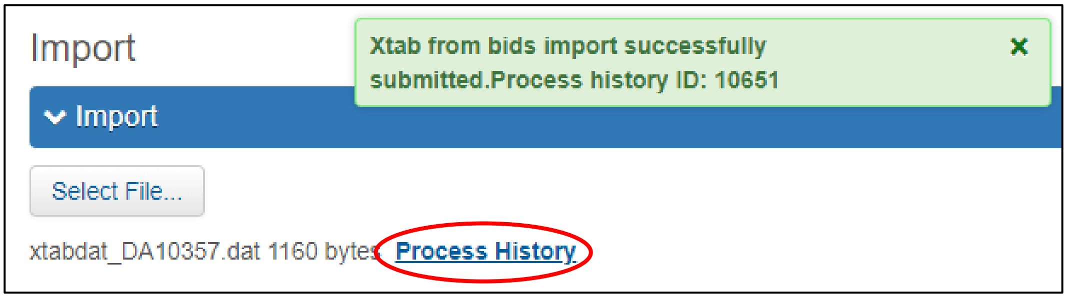


5	Click the **SELECT DBE FILE** button.	A dialog will appear that will prompt you to select the file from the location where you saved it.
6	Select the **XdbeDat.DAT** file and click the **OPEN** button.	The **XdbeDat.DAT** file will be imported.
7	Click the **IMPORT** button.	A message that the import has been submitted will appear above the **Header Bar**.

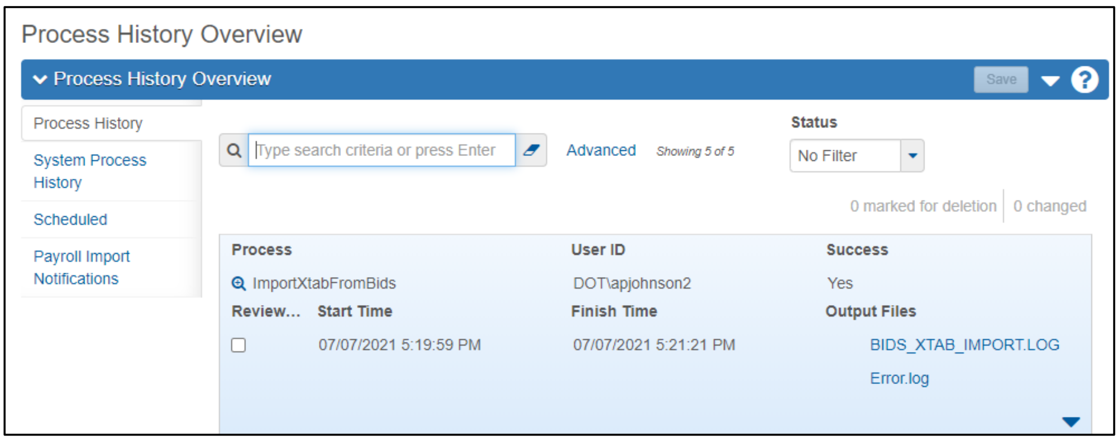
Continued on Following Page

Loading Electronically Submitted Bids

(continued)



8	Click the ***Process History*** link.	The **Process History Overview** page will appear.



9	In the **OUTPUT FILES** section, download **BIDS_XTAB_IMPORT.LOG**, and **Error.log** by clicking on the file name.	Clicking a file will download it to the **Downloads** folder on your computer.

BIDS_XTAB_IMPORT.LOG	This file will list any errors or warnings encountered during the import process. If a step has failed, it will appear in red. Warnings will appear in yellow.
Error.log	This file only lets you know whether the process has failed or completed successfully.

If the **BIDS_XTAB_IMPORT.log** file contains errors, fix them, and repeat this procedure.

Continued on Following Page

Loading Electronically Submitted Bids

(continued)

When you are finished working with the files on the **Process History Overview** page, you can delete them by following the procedure for **Deleting a Process** on **Page 13-1**.

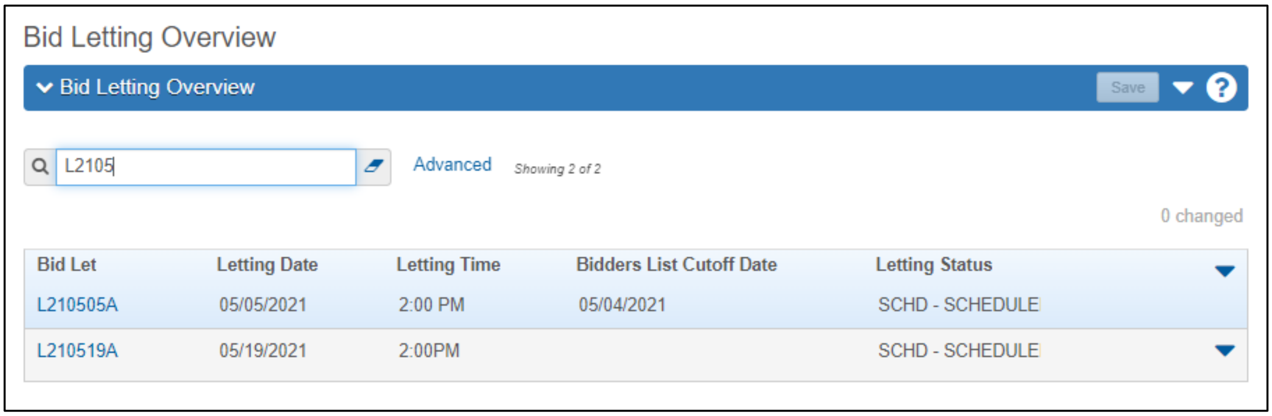
🗁**NOTE:** If, for any reason you need to re-import bids, do not re-import the DBE file (Step 5 & 6).

Deleting a Proposal Vendor

If you need to delete a proposal vendor:

From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	In the **Preconstruction** section, click **LETTINGS**.	The **Bid Letting Overview** page will appear.



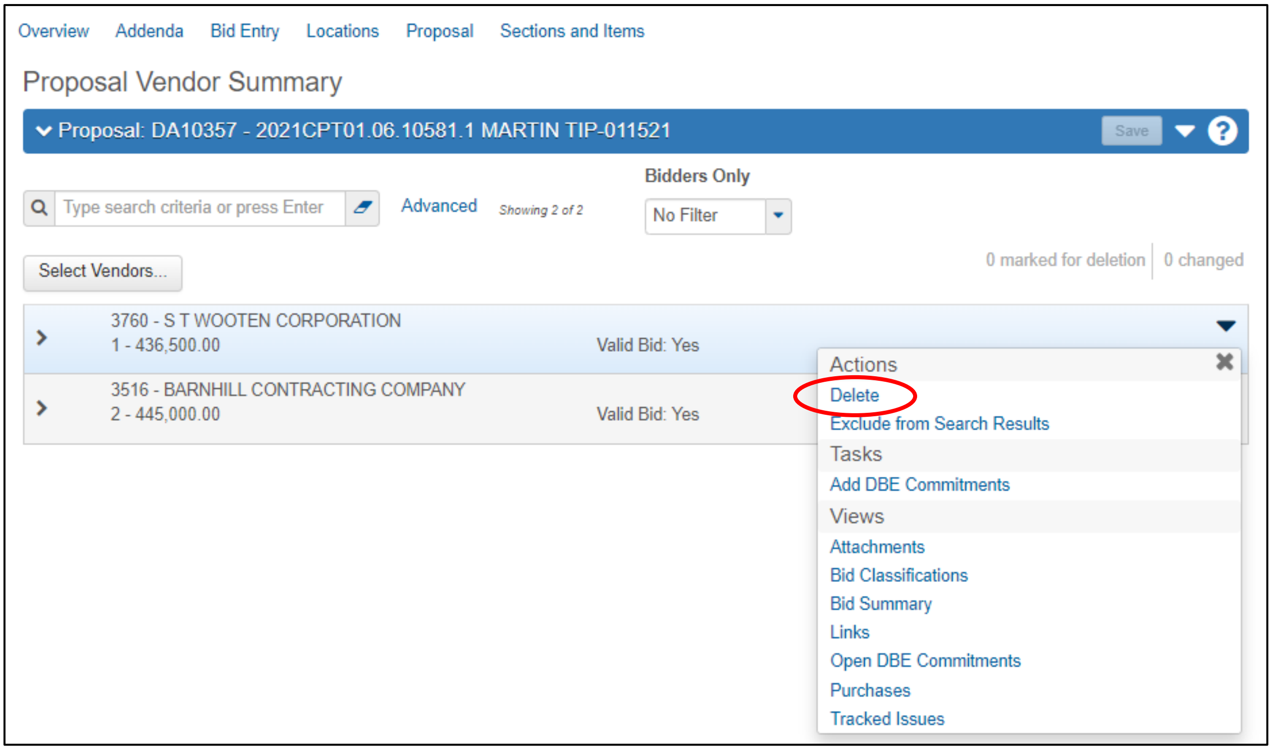
Step	Action	Result
2	Type ***the letting number*** in the search filter. The results will auto filter as you type.	The letting will appear in the results.
3	Click on the **LETTING NUMBER** you wish to open.	The **Bid Letting Summary** page will appear.
4	Click the **Proposals** tab.	The list of proposals in the letting will appear.
5	Click on ***the proposal you wish to delete a vendor from***.	The **Proposal Summary** page will appear.

Continued on Following Page

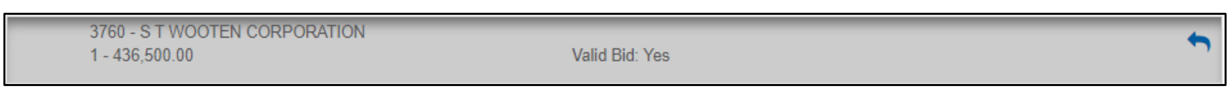
Deleting a Proposal Vendor

(continued)

6	Click the ***Proposal Vendors*** Quick Link.	The **Proposal Vendor Summary** page will appear.



7	From the drop-down arrow at the right side of the **row containing the vendor you wish to Delete** select **DELETE**.	The drop-down arrow for this vendor will change to an **undo arrow**. This indicates that the vendor is flagged for removal by the system.



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Deleting a Proposal Vendor

(continued)

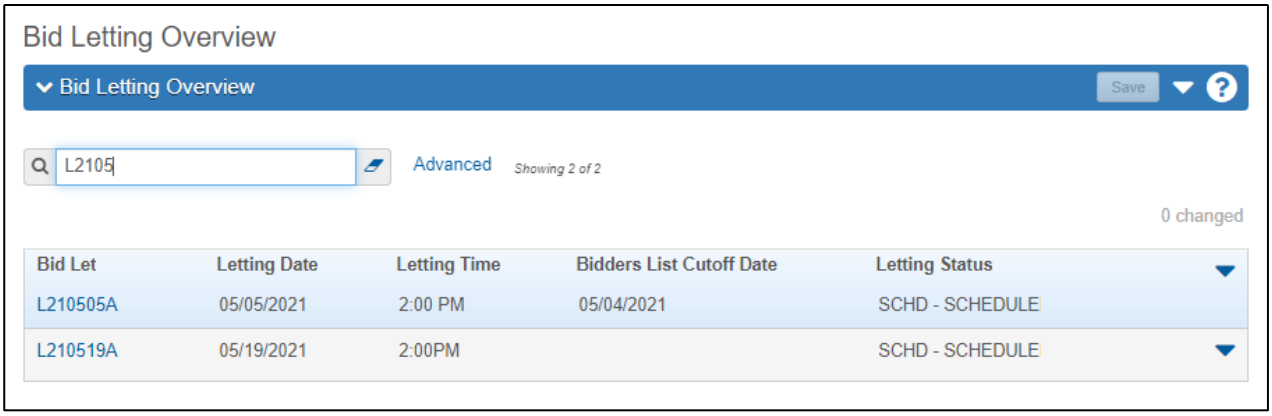
If you wish to **Undo** a deletion, you can click the **undo arrow** at the end of the deleted row. **You must do this before you save changes.**

8	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar.**

Reconciling Bids

From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	In the **Preconstruction** section, click **LETTINGS**.	The **Bid Letting Overview** page will appear.



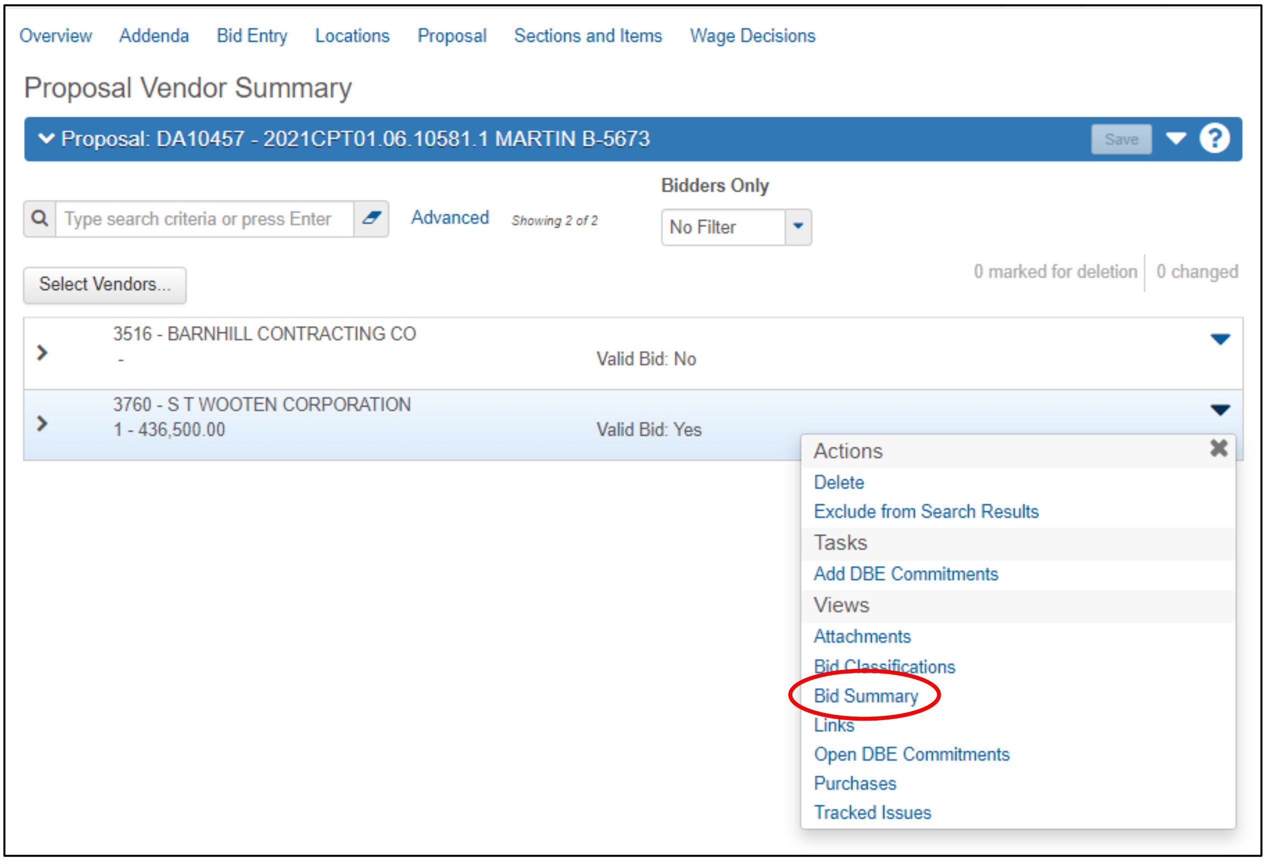
2	Type ***the letting number*** in the search filter. The results will auto filter as you type.	The letting will appear in the results.
3	Click on the **LETTING NUMBER** you wish to open.	The **Bid Letting Summary** page will appear.
4	Click the **Proposals** tab.	The list of proposals in the letting will appear.
5	Click on ***the proposal you have imported bids for***.	The **Proposal Summary** page will appear.
6	Click the ***Proposal Vendors*** Quick Link.	The **Proposal Vendor Summary** page will appear.

Continued on Following Page

Reconciling Bids

(continued)

The lowest bidder will appear first.

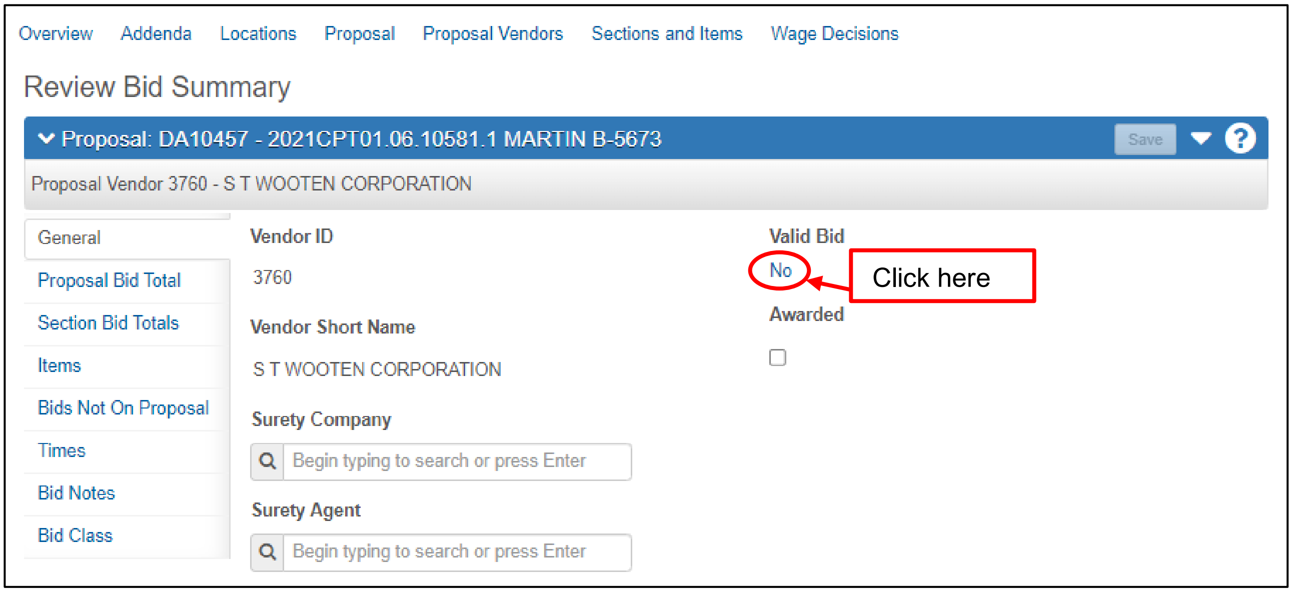


7	From the drop-down arrow at the right side of the **row containing the vendor you wish to reconcile the bid of** select ***Bid Summary***.	The **Review Bid Summary** page will appear.

Continued on Following Page

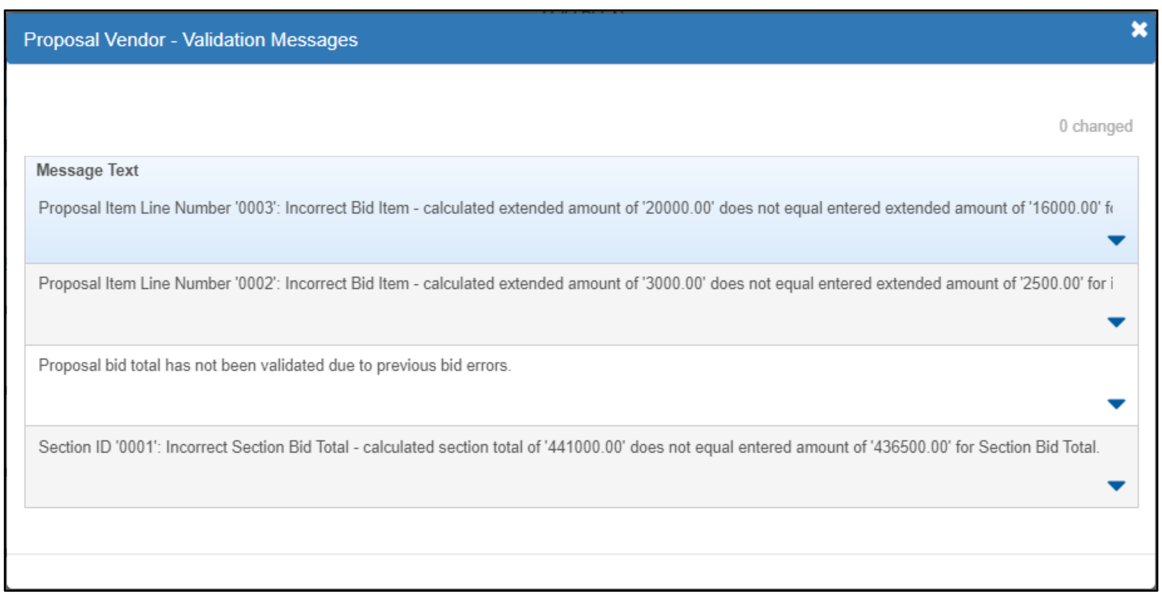
Reconciling Bids

(continued)



If the bid is valid, the value in the **VALID BID** field will be ***Yes***.

If this value is ***No***, click on the value to view the errors.



Follow the message prompts to correct the errors.

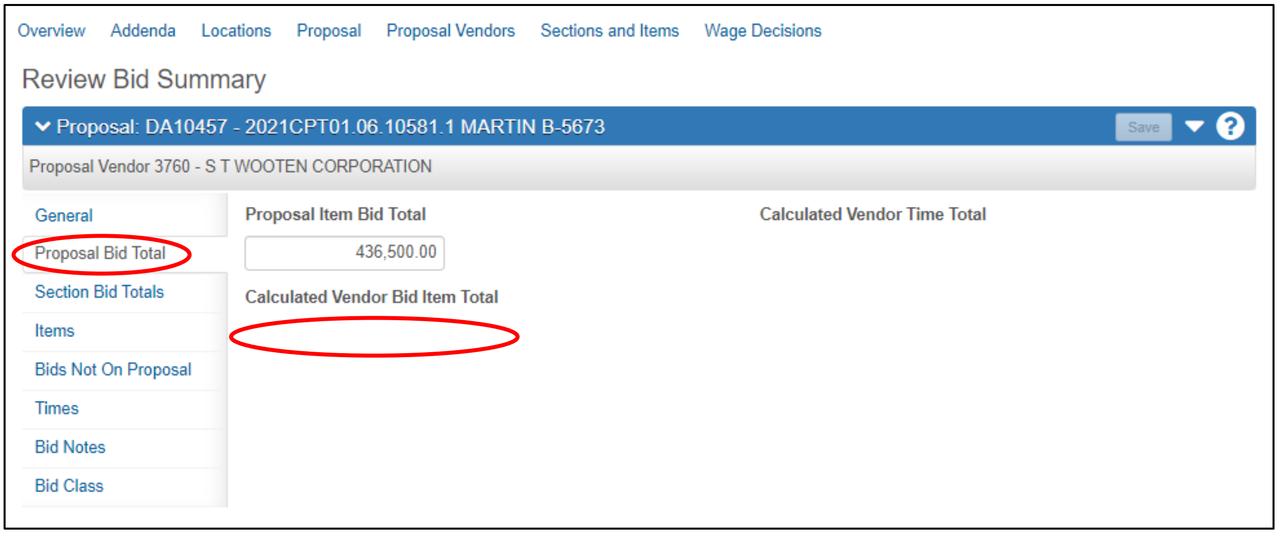
If you are unable to fix the errors, send an email to awphelp@ncdot.gov for assistance.

Continued on Following Page

Reconciling Bids

(continued)

8	Click the **Proposal Bid Total** tab. On this tab you will be able to reconcile the bid totals. They should match.	The **Proposal Bid Total** page will appear.



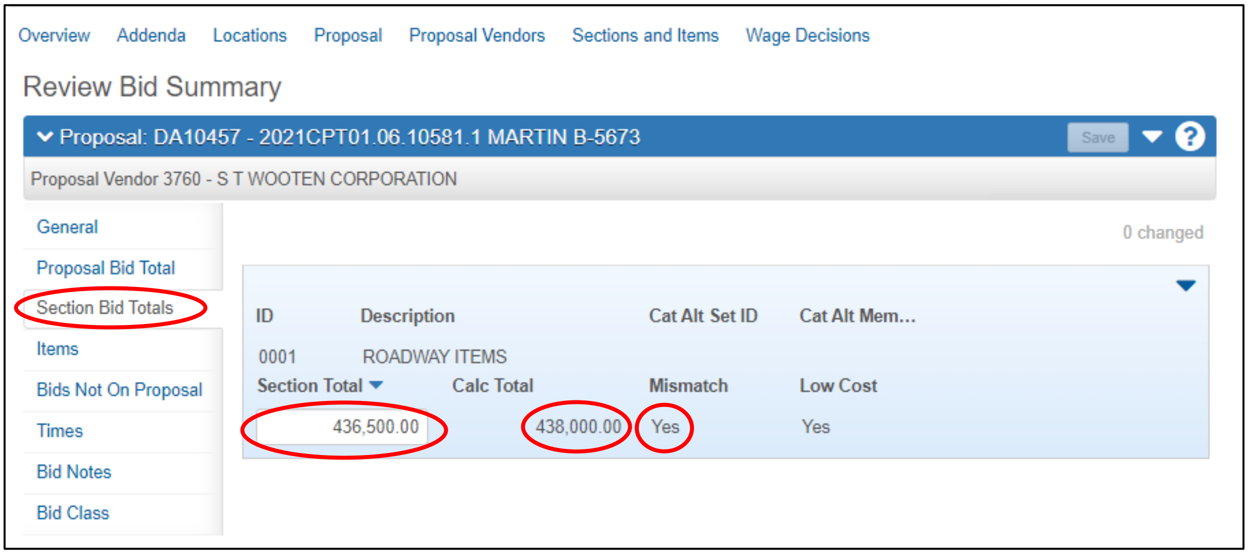
If they do not match, the **CALCULATED VENDOR BID ITEM TOTAL** will be missing.

9	Click the **Section Bid Totals** tab. This tab will list the total for each section. The **SECTION TOTAL** and **CALC TOTAL** fields should be equal and **No** should appear in the **MISMATCH** field.	The **Section Bid Totals** page will appear.

Continued on Following Page

Reconciling Bids

(continued)



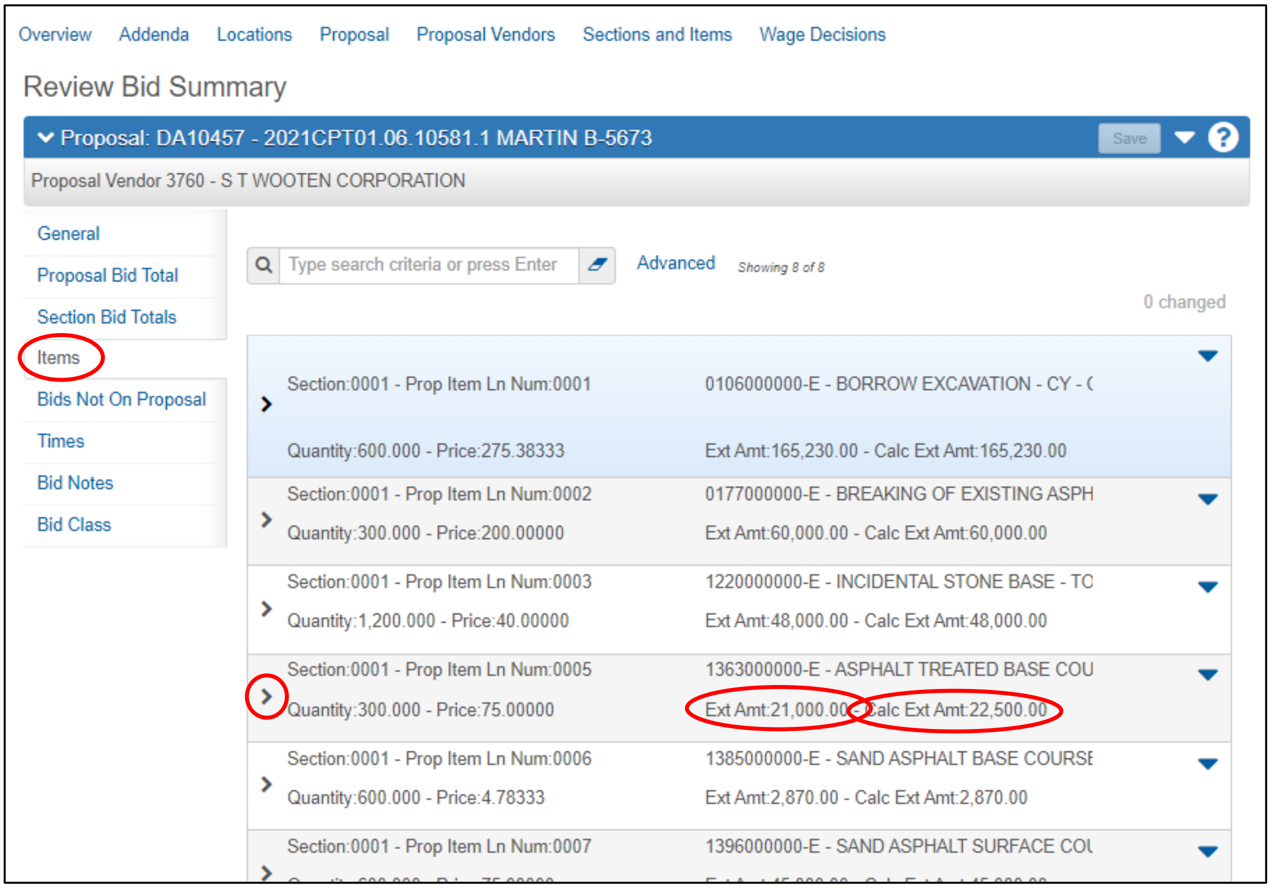
If the **Section Total** and **Calc Total** fields are not equal, there will be a **Yes** in the **Mismatch** field.

10	Click the **Items** tab. You will be able to expand each item to see bid pricing and item information.	The **Items** page will appear.

Continued on Following Page

Reconciling Bids

(continued)



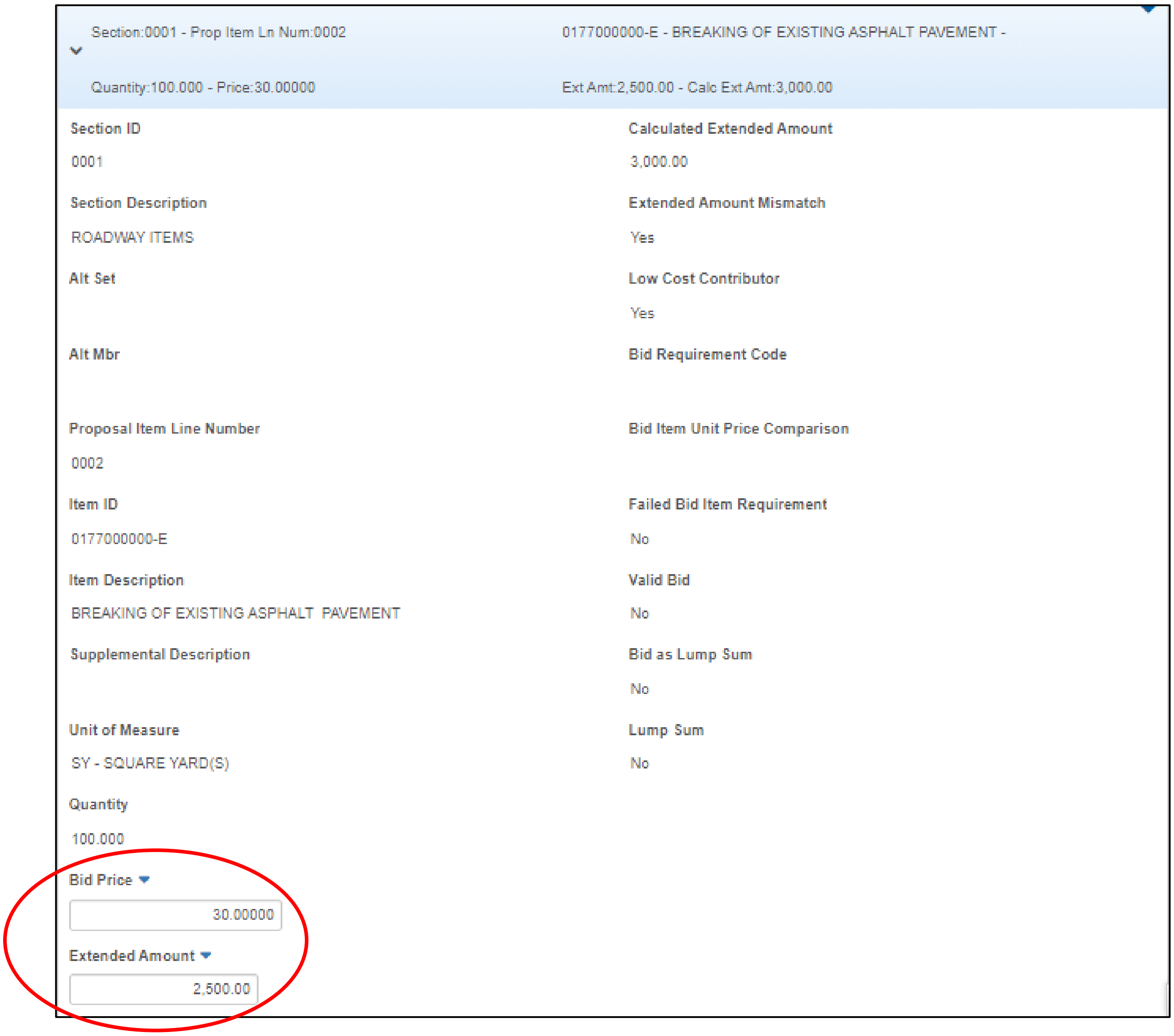
On the **Items** tab, check to make sure the **EXT AMT** and **CALC EXT AMT** fields match.

If they don't, click the  arrow to expand the Item.

Continued on Following Page

Reconciling Bids

(continued)



Once the item is expanded, scroll to the bottom of the item record and you will be able to change the incorrect value.

If any changes are made at the item level, you will need to re-check all totals (**Proposal Bid Total** tab and **Section Bid Totals** tab) to make sure everything is correct before proceeding.

Continued on Following Page

Reconciling Bids

(continued)

11	If applicable, click the **Bids Not On Proposal** tab. This tab will show any bids that are not linked to a specific proposal item.	The **Bids Not On Proposal** page will appear.

Each proposal that is received must conform to NCDOT Specifications. If any of the rules are not met, you will have to make a note of them to explain their inconsistencies.

Bid Irregularities

If the bid **DOES NOT** contain irregularities, **skip steps 12 – 16**.

If the bid contains irregularities:

12	Click the **Bid Class** tab.	The **Bid Class** page will appear.
13	Select the applicable **code (rule that was not followed)** from the drop-down list in the BID CLASS CODE field. 🗁**NOTE:** This is a list of the rules that contractors should observe when submitting bids.	N/A
14	Click the **Bid Notes** tab.	The **Bid Notes** page will appear.
15	Type an ***explanation of any irregularities associated with the bid*** in the NOTES field. Describe the rule not followed in detail.	N/A
16	Click the SAVE button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

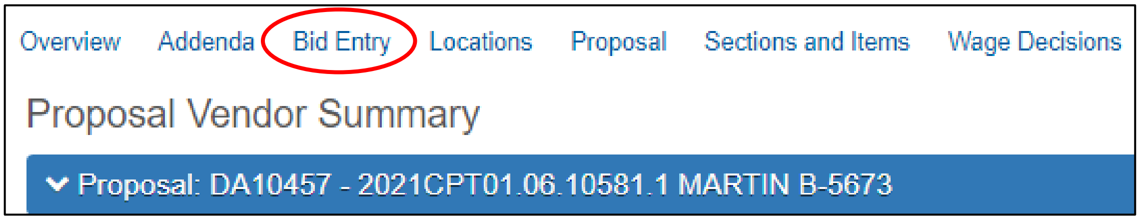
Continued on Following Page

Reconciling Bids

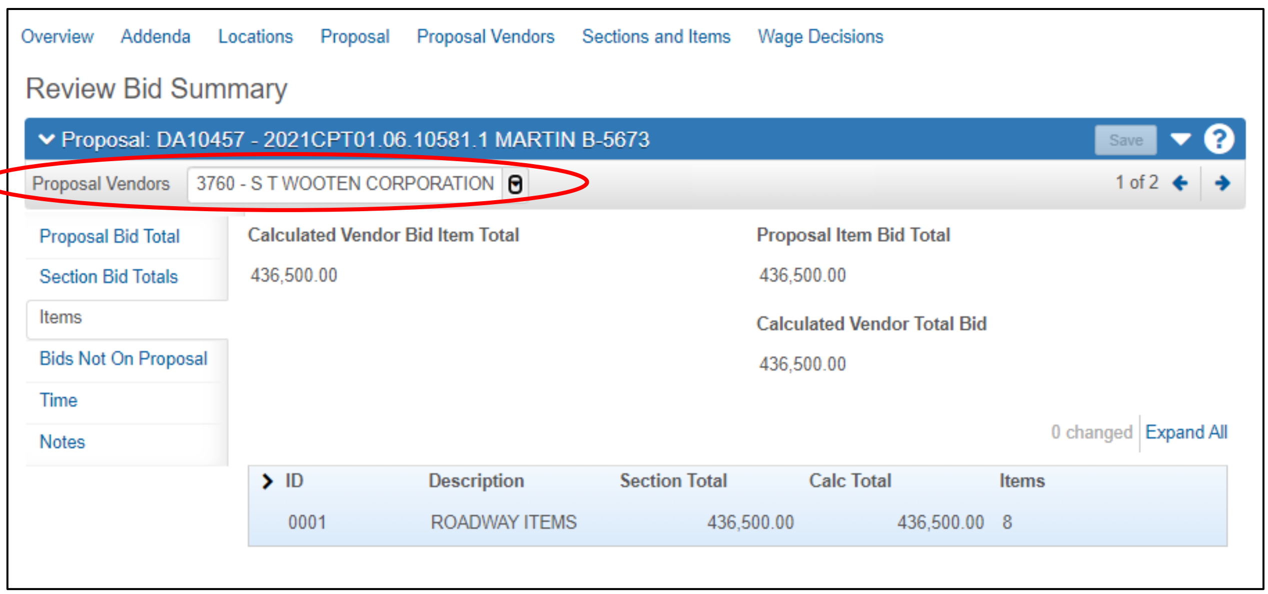
(continued)

Alternatively, you can view Bid Item information by clicking the **Bid Entry** link at the top of the previous page.

This provides a more concise way to view the item list.



Once you are on the **Bid Entry Summary Page**, click the **Items** tab.



You'll be able to view the items for each vendor by selecting the vendor from the **PROPOSAL VENDORS** drop-down list.

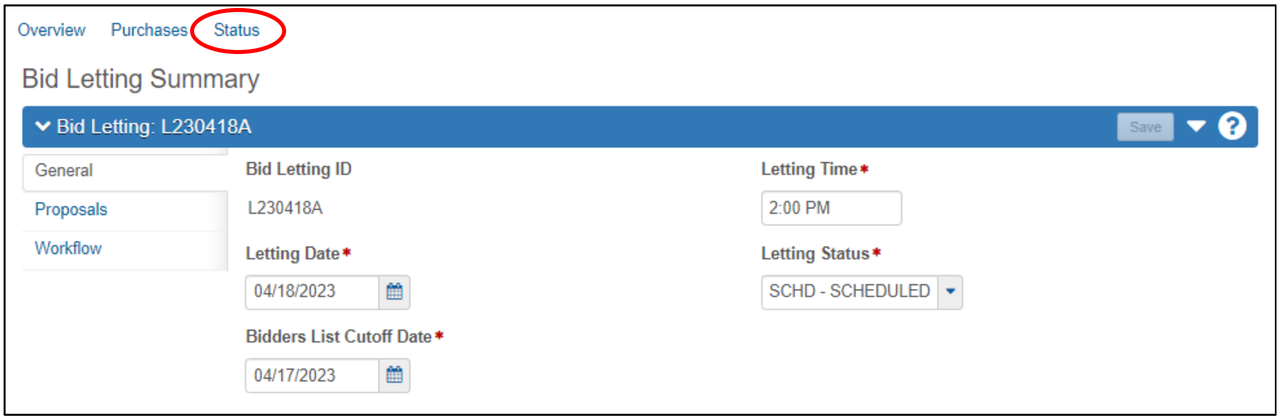
Continued on Following Page

Reconciling Bids

(continued)

Changing Proposal Status to LET

17	Using the **PREVIOUS** button drop-down list, navigate back to the **Bid Letting Summary** page for the letting.	The **Bid Letting Summary** page will appear.



18	Click the **Status** Quick Link.	The **Bid Letting Status Summary** page will appear.
19	Expand the proposal by clicking the arrow.	The proposal will appear.

Continued on Following Page

Reconciling Bids

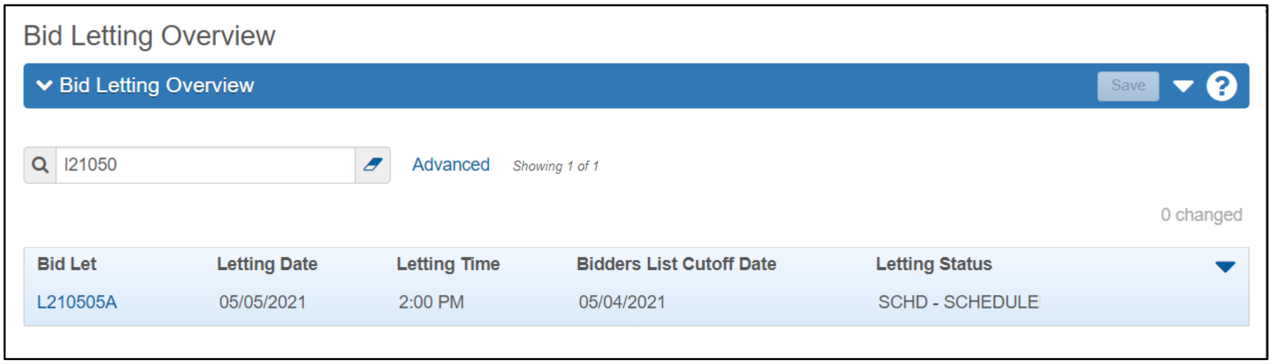
(continued)

20	Select ***LET*** from the drop-down list in the **PROPOSAL STATUS** field.	N/A
21	Type ***the current date*** in the **STATUS DATE** field. 🗁**NOTE:** If you click the **CALENDAR** button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
22	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Adding DBE Commitments

From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	In the **Preconstruction** section, click **Lettings**.	The **Bid Letting Overview** page will appear.



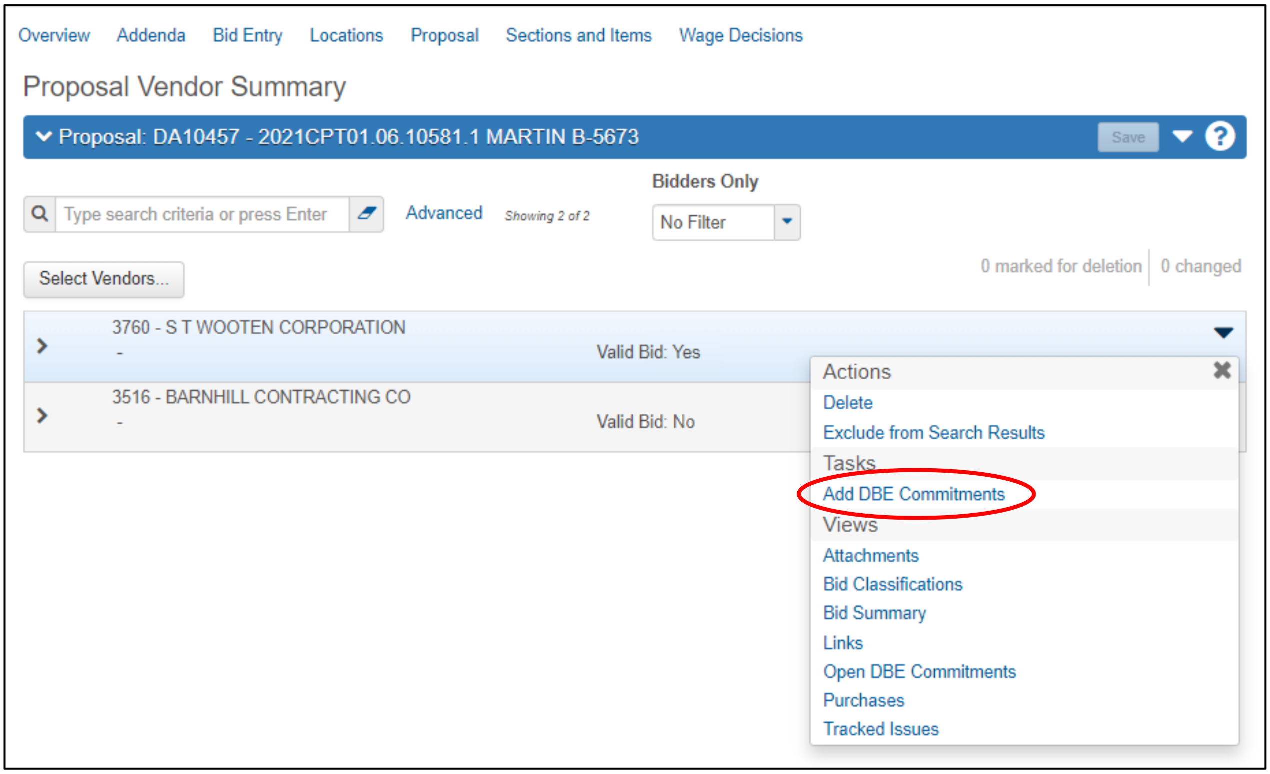
2	Type ***the letting number*** in the search filter. The results will auto filter as you type.	The letting will appear in the results.
3	Click on the **Letting number** you wish to open.	The **Bid Letting Summary** page will appear.
4	Click the **Proposals** tab.	The list of proposals in the letting will appear.
5	Click on ***the proposal you have imported bids for***.	The **Proposal Summary** page will appear.

Continued on Following Page

Adding DBE Commitments

(continued)

6	Click the ***Proposal Vendors*** Quick Link.	The **Proposal Vendor Summary** page will appear.

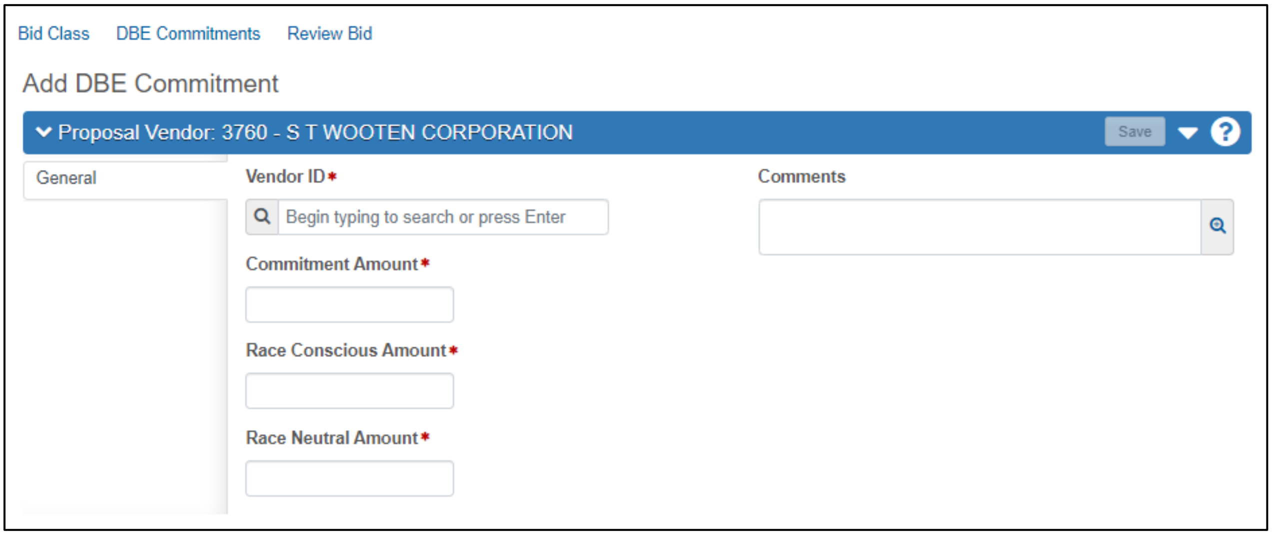


7	From the drop-down arrow at the right side of the **row containing the vendor** select ***Add DBE Commitments***.	The **Add DBE Commitment** page will appear.

Continued on Following Page

Adding DBE Commitments

(continued)



8	Begin typing the ***Vendor ID number*** or ***Vendor Name*** in the **Vendor ID** field	A drop-down list of vendors that match the text you're typing will appear.
9	Select ***the Vendor*** from the drop-down list.	The ***Vendor information*** will appear in the **Vendor ID** field.
10	Type ***the commitment amount*** in the **Commitment Amount** field.	N/A
11	Click the **Save** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

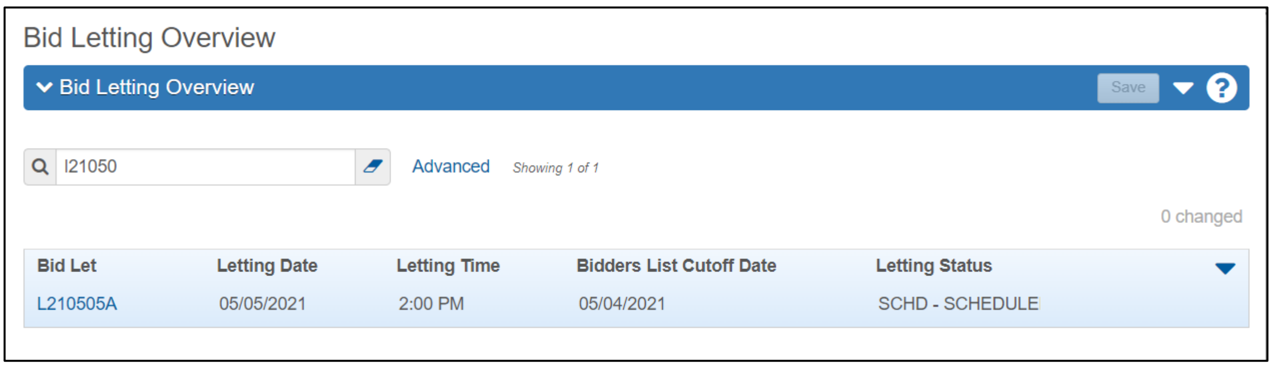
Editing DBE Commitments

If you need to re-import bids, do not re import the XDBE file.

If this happens, the DBE commitments will double.
You will be able to edit them by following this procedure.

From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	In the **Preconstruction** section, click **LETTINGS**.	The **Bid Letting Overview** page will appear.



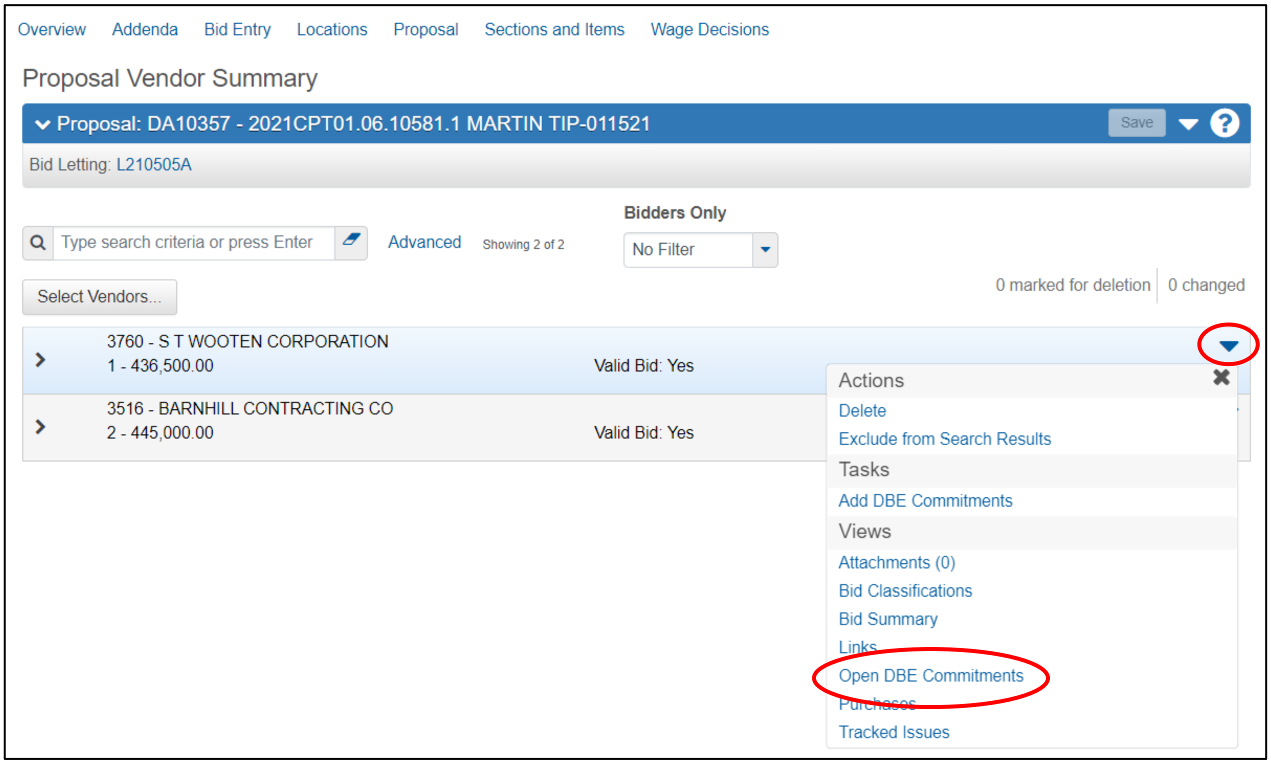
2	Type ***the letting number*** in the search filter. The results will auto filter as you type.	The letting will appear in the results.
3	Click on the **LETTING NUMBER** you wish to open.	The **Bid Letting Summary** page will appear.
4	Click the **Proposals** tab.	The list of proposals in the letting will appear.
5	Click on ***the proposal you have imported bids for***.	The **Proposal Summary** page will appear.

Continued on Following Page

Editing DBE Commitments

(continued)

6	Click the ***Proposal Vendors*** Quick Link.	The **Proposal Vendor Summary** page will appear.

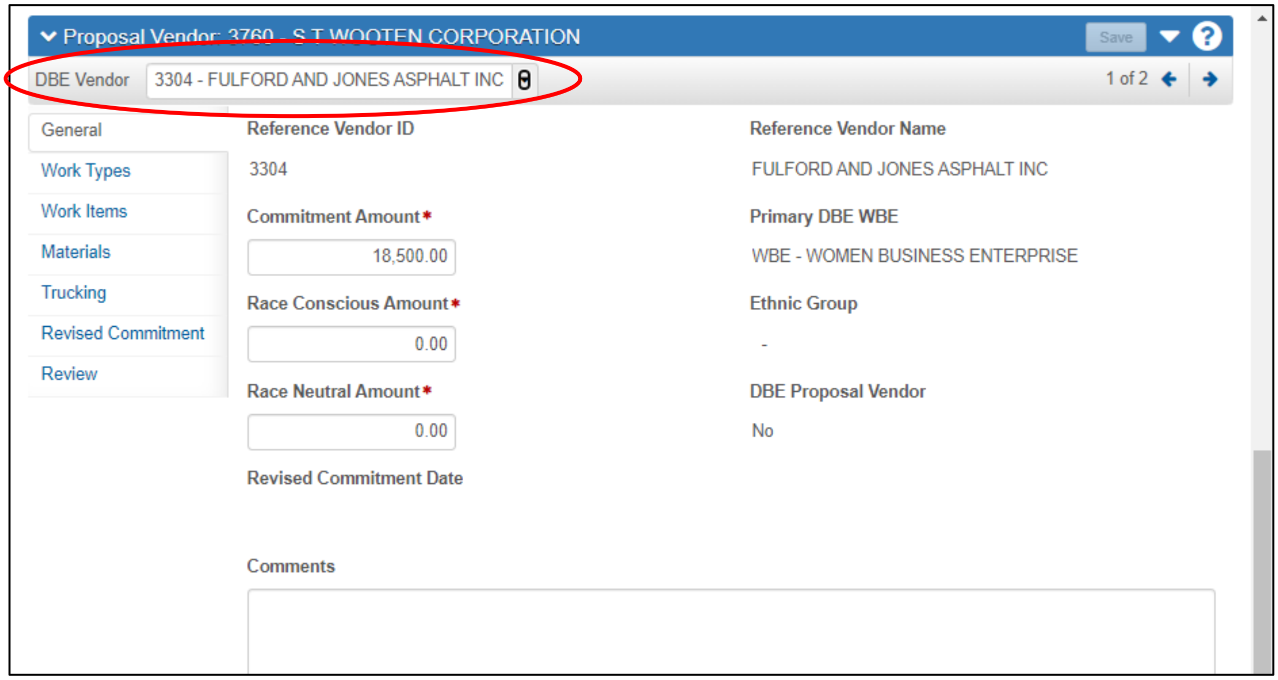


7	From the drop-down arrow at the right side of the **row containing the vendor** select ***Open DBE Commitments***.	The **Proposal Vendor DBE Commitment Summary** page will appear.
8	Scroll to the bottom of the page.	N/A

Continued on Following Page

Editing DBE Commitments

(continued)



9	Select ***the DBE*** from the drop-down list in the **DBE VENDOR** field to edit information for them.	N/A
10	Type ***the commitment amount*** in the **COMMITMENT AMOUNT** field.	N/A
11	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

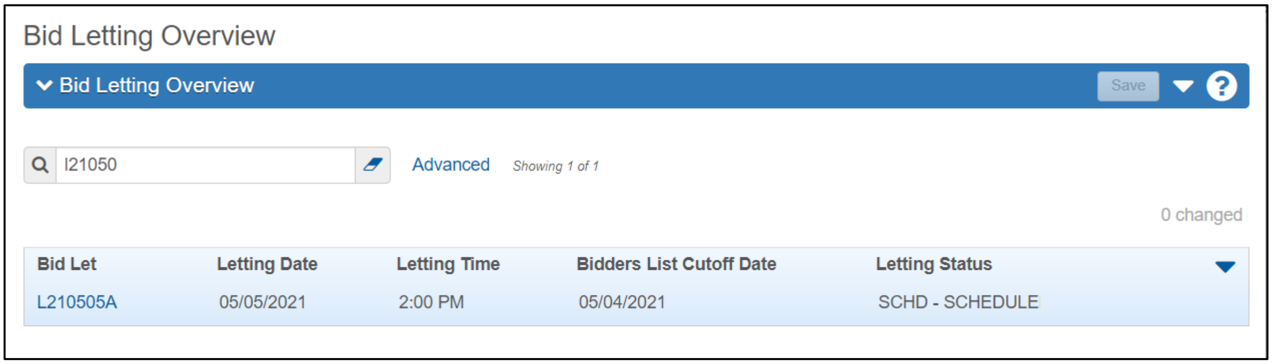
Repeat **Steps 9-11** for each **DBE Vendor** you wish to edit the **DBE Commitments** of.

You will notice that once you have changed the Commitment Amount, the amount and percent will change when you scroll back up the page.

Deleting DBE Commitments

From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	In the **Preconstruction** section, click **LETTINGS**.	The **Bid Letting Overview** page will appear.



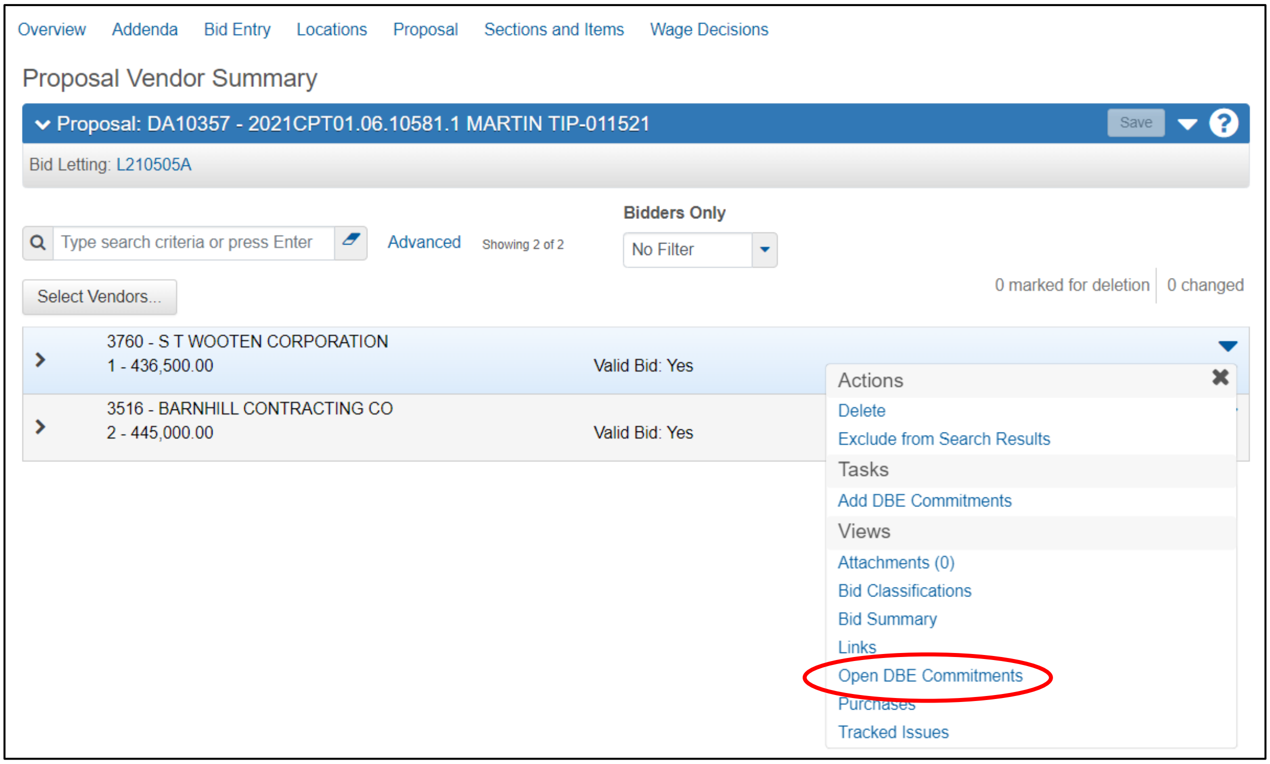
2	Type ***the letting number*** in the search filter. The results will auto filter as you type.	The letting will appear in the results.
3	Click on the **LETTING NUMBER** you wish to open.	The **Bid Letting Summary** page will appear.
4	Click the **Proposals** tab.	The list of proposals in the letting will appear.
5	Click on ***the proposal you have imported bids for***.	The **Proposal Summary** page will appear.

Continued on Following Page

Deleting DBE Commitments

(continued)

6	Click the ***Proposal Vendors*** Quick Link.	The **Proposal Vendor Summary** page will appear.

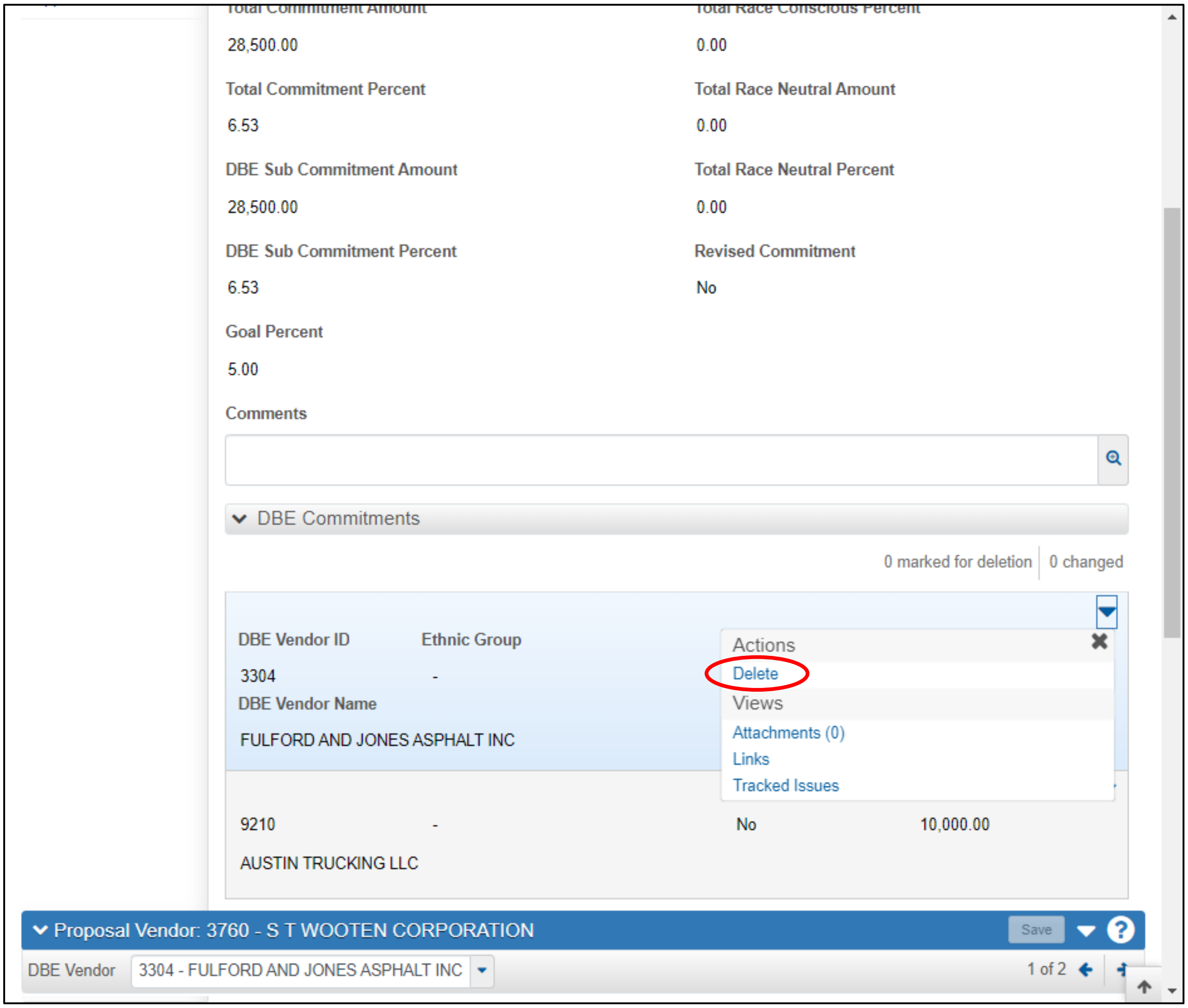


7	From the drop-down arrow at the right side of the **row containing the vendor** select ***Open DBE Commitments***.	The **Proposal Vendor DBE Commitment Summary** page will appear.
8	Scroll to the list of **DBE Commitments**.	N/A

Continued on Following Page

Deleting DBE Commitments

(continued)



9	From the drop-down arrow at the right side of the **row containing the DBE Commitment** select ***Delete***	The drop-down arrow for this DBE Commitment will change to an  **undo arrow**. This indicates that this record is flagged for removal by the system.

Continued on Following Page

Deleting DBE Commitments

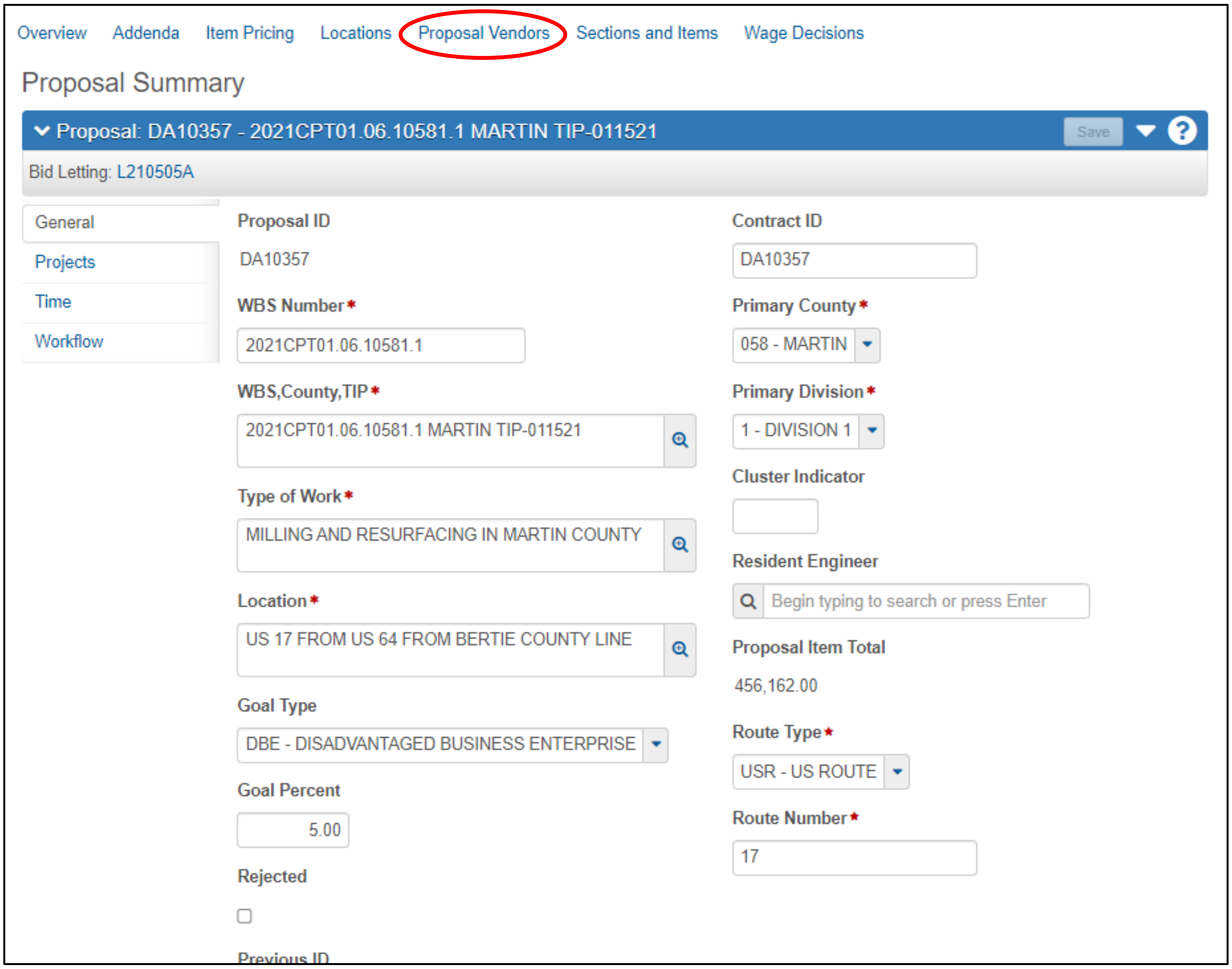
(continued)

NOTE: If you wish to undo the deletion, you may click the undo arrow at any point before the record is saved.

10	Click the SAVE button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Reviewing and Approving the DBE Commitment

From within a proposal, on the **Proposal Summary** page:



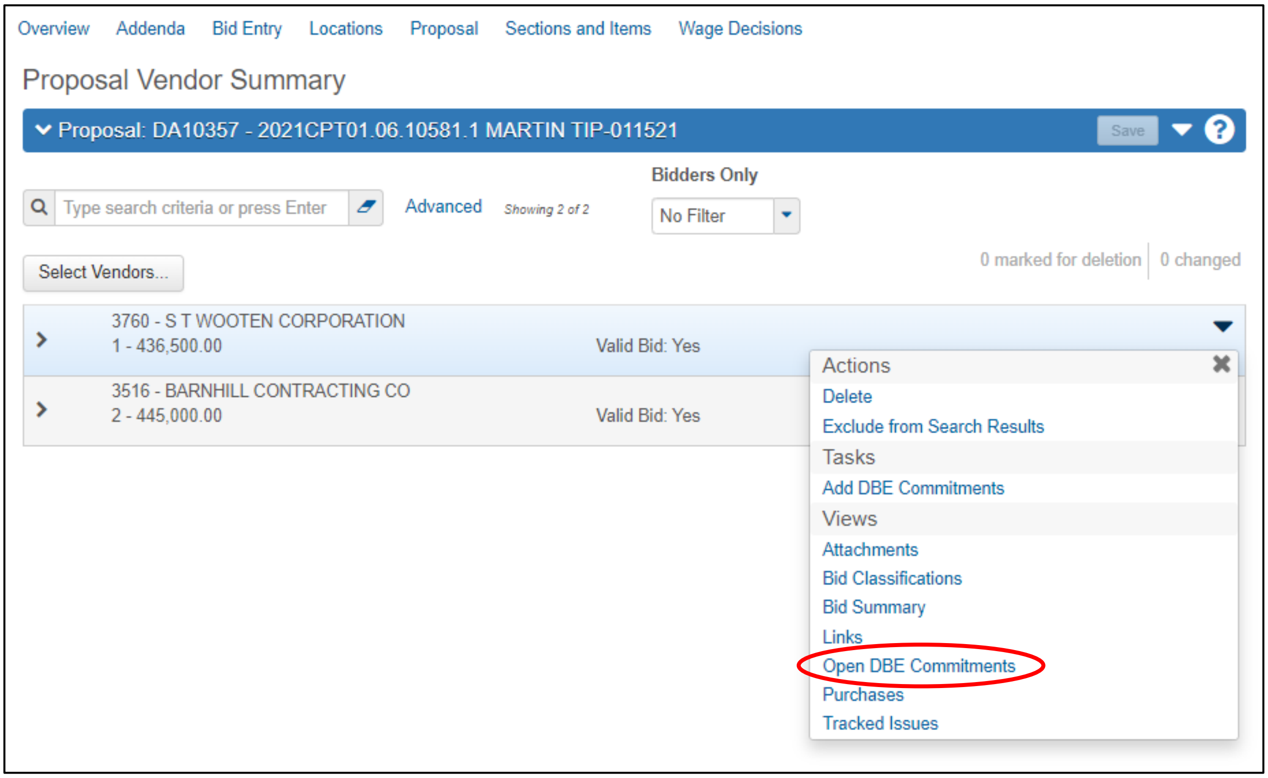
(*Proposal Summary Page*)

Step	Action	Result
1	Click the ***Proposal Vendors*** Quick Link.	The **Proposal Vendor Summary** page will appear.

Continued on Following Page

Reviewing and Approving the DBE Commitment

(continued)

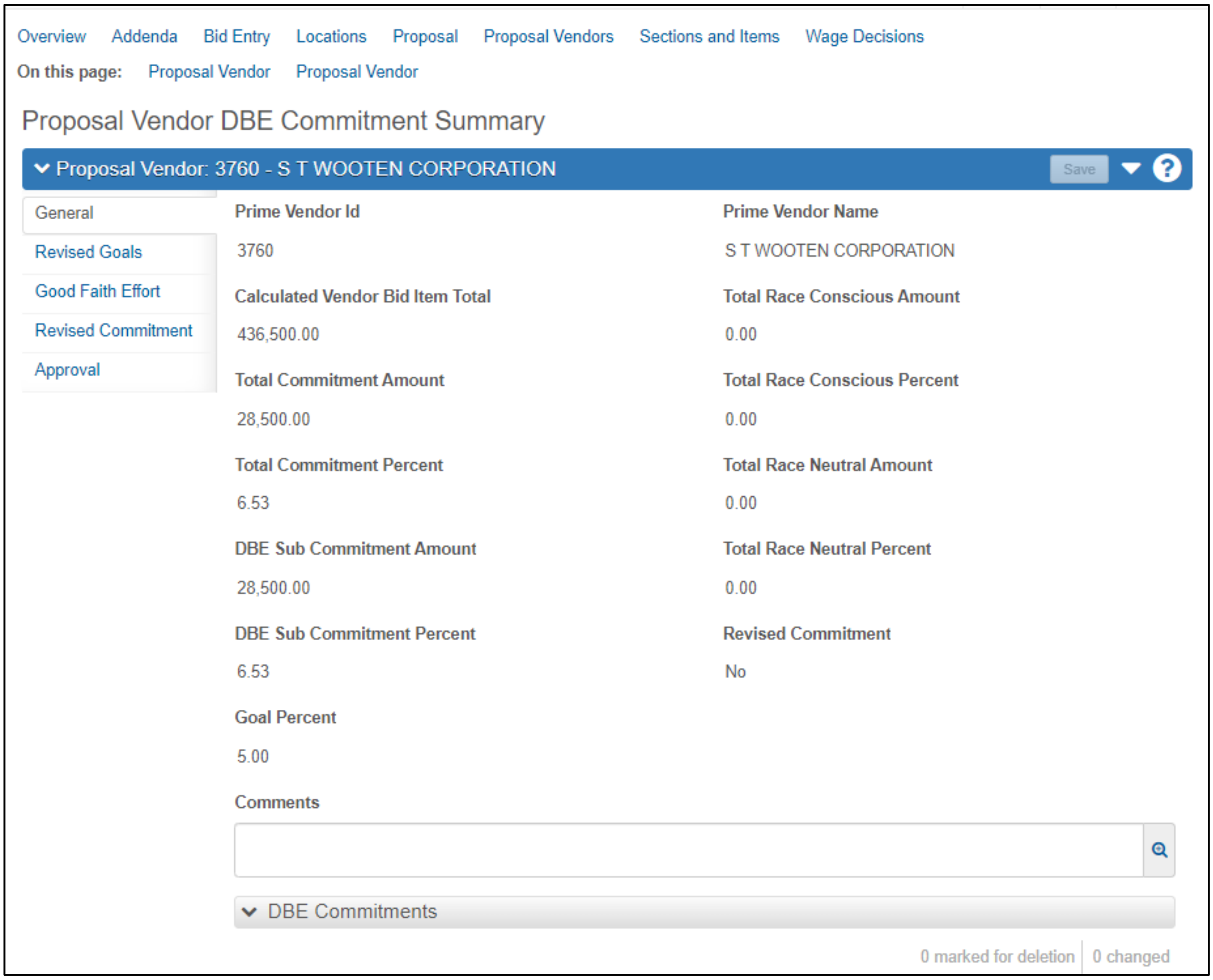


2	From the drop-down arrow at the right side of the **row containing the vendor** select ***Open DBE Commitments***.	The **Proposal Vendor DBE Commitment Summary** page will appear.

Continued on Following Page

Reviewing and Approving the DBE Commitment

(continued)



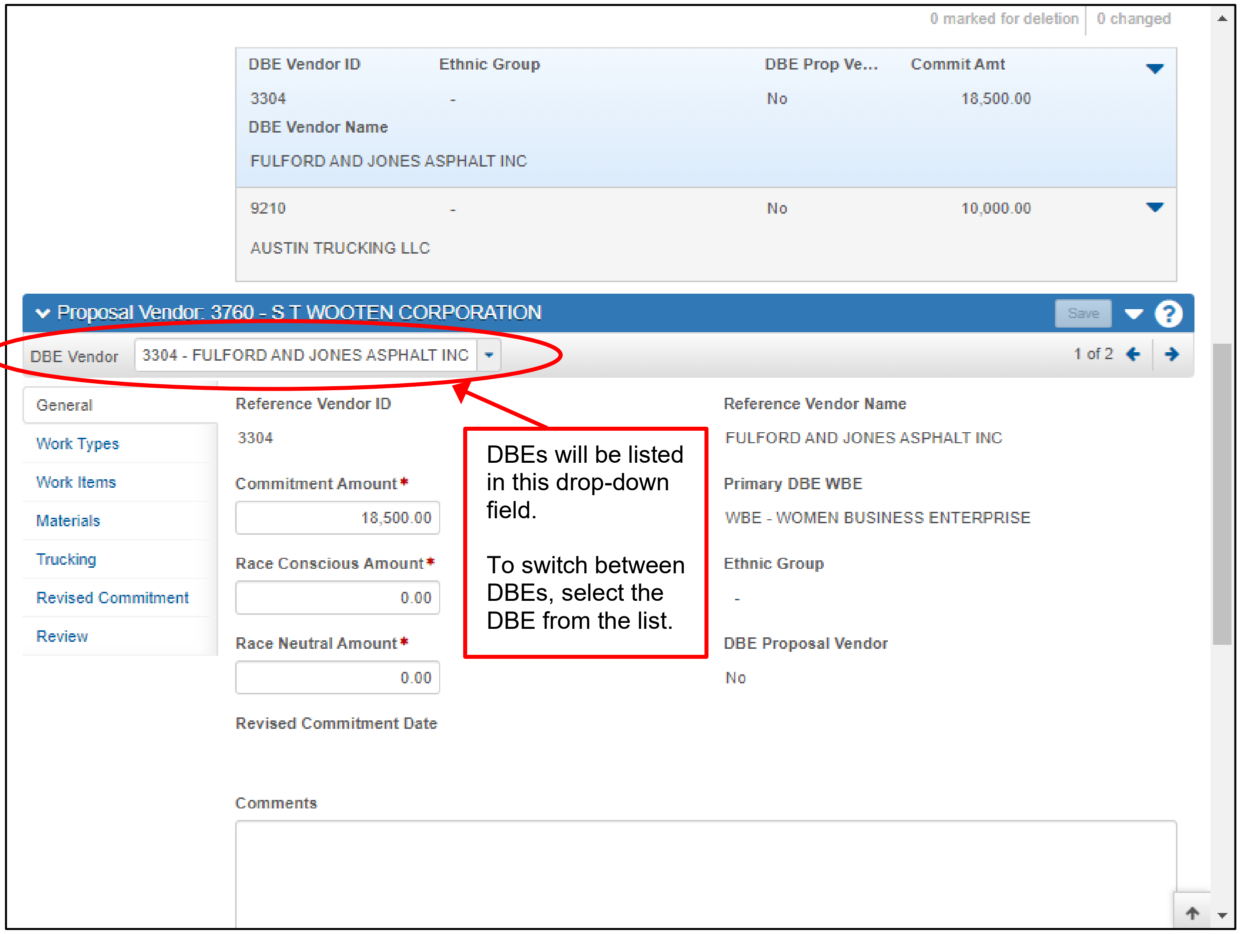
🗁**NOTE:** You may have to scroll down to the bottom of this page to enter DBE Commitment information.

3	If applicable, type any comments in the **COMMENTS** field.	N/A

Continued on Following Page

Reviewing and Approving the DBE Commitment

(continued)

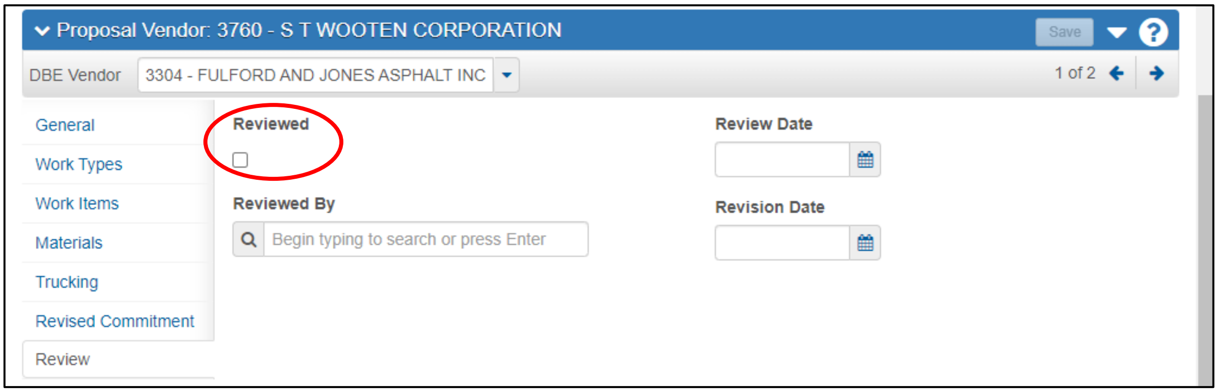


4	Click the **REVIEW** tab for the selected DBE.	The **Review** tab will appear.

Continued on Following Page

Reviewing and Approving the DBE Commitment

(continued)



5	Check the **REVIEWED** check box.	N/A
6	Select ***the individual who reviewed this information*** from the drop-down list in the **REVIEWED BY** field.	N/A
7	Type ***the current date*** in the **REVIEW DATE** field. **NOTE:** If you click the **CALENDAR** button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
8	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Repeat **steps 3-8** for each DBE in the **DBE VENDOR** drop-down list.

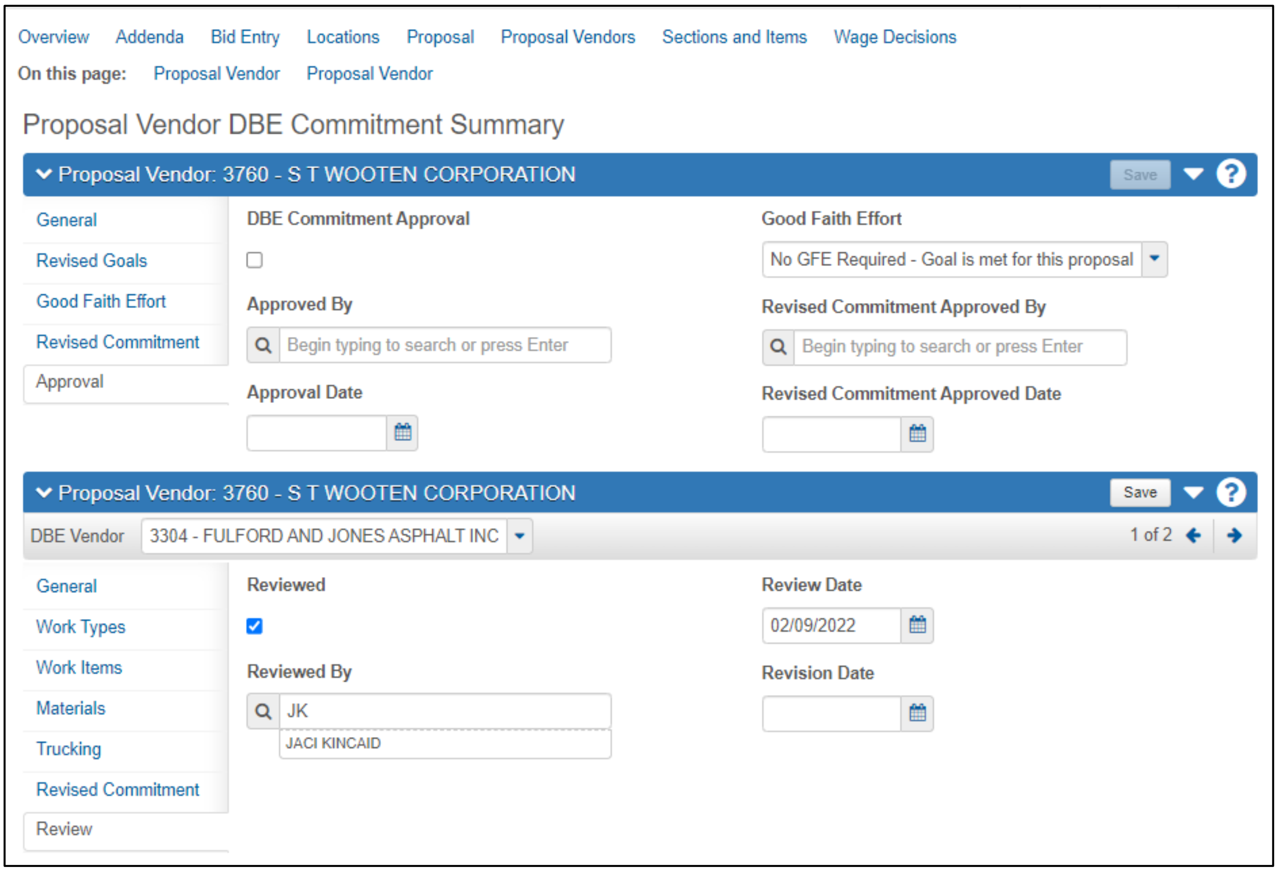
Continued on Following Page

Reviewing and Approving the DBE Commitment

(continued)

Processing an Approval

9	Scroll back up to the top of the page.	N/A
10	Click the **Approval** tab.	The **Approval** tab will appear.



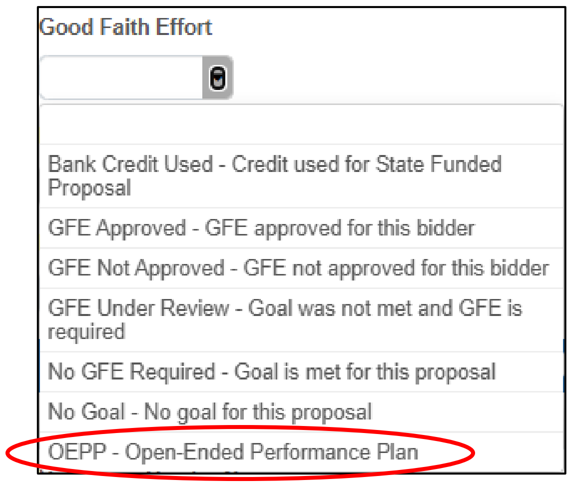
11	Check the **DBE Commitment Approval** check box.	N/A
12	Select the ***individual who is approving this information*** from the drop-down list in the **Approved By** field.	N/A

Continued on Following Page

Reviewing and Approving the DBE Commitment

(continued)

13	Type ***the current date*** in the **APPROVAL DATE** field. 🗁**NOTE:** If you click the **CALENDAR** button, a popup calendar will allow you to select the date so that it appears in the field.	N/A



14	Select ***the type of good faith effort utilized*** from the drop-down list in the **GOOD FAITH EFFORT** field. 🗁**NOTE:** For Design Build projects, select ***OEPP – Open-Ended Performance Plan*** from the list.	N/A
15	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete message*** will appear above the **Header Bar**.

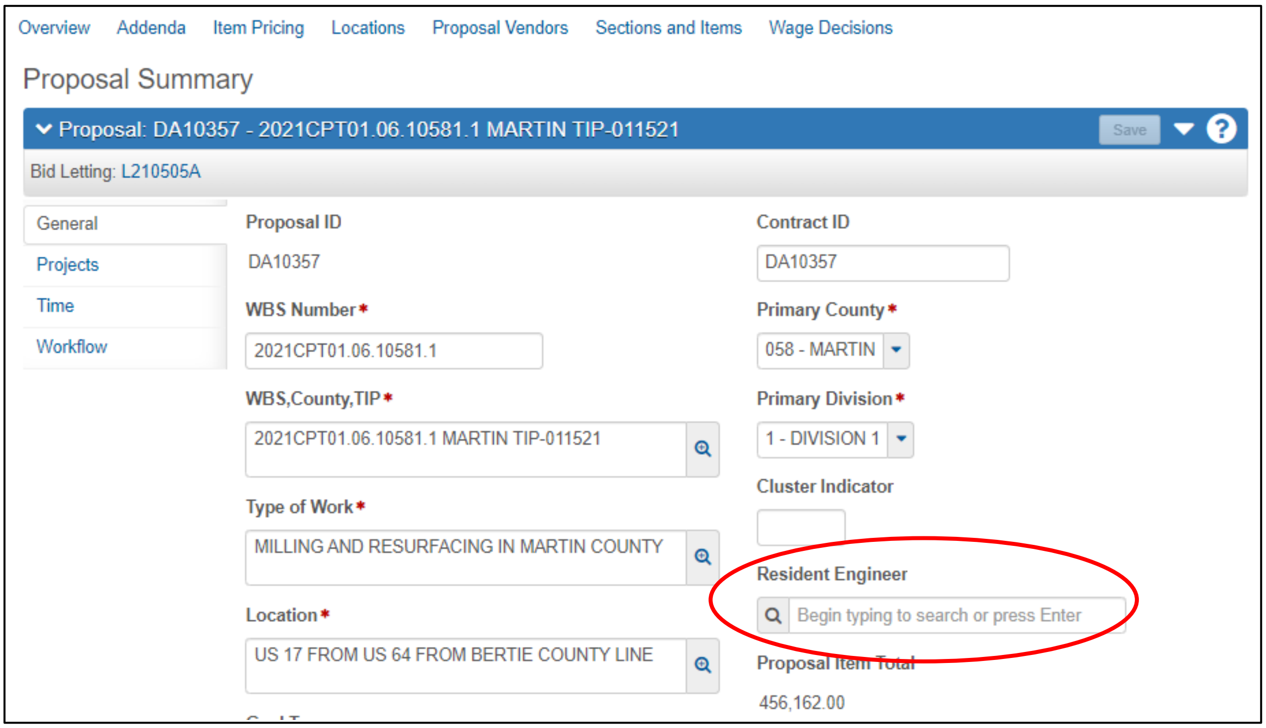
If you receive a warning message stating that the sum of the **Total Race Conscious Amount** and the **Total Race Neutral Amount** don't equal the **Total Commitment Amount** ignore it.

Assigning the Resident Engineer

When a project/proposal was originally set up, a name had to be selected for the **RESIDENT ENGINEER** field for the system to accept all the other information. At that time, it may not have been known who would be assigned. Before the Contract can be passed to HiCams, this must be corrected.

NOTE: If this information was known at proposal setup, this procedure can be skipped.

From within a proposal, on the **Proposal Summary** page:



(*Proposal Summary Page*)

Step	Action	Result
1	Select ***the resident engineer*** from the drop-down list in the **RESIDENT ENGINEER** field. **NOTE:** You will be able to parse the list by typing the name, city, or division number (div1, div2, etc.) of the resident engineer.	N/A

Continued on Following Page

Assigning the Resident Engineer

(continued)

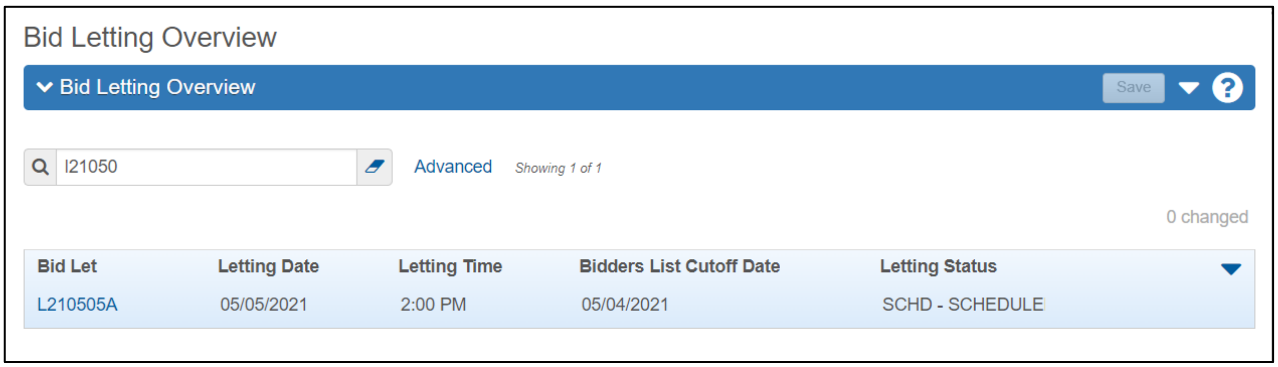
2	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete message*** will appear above the **Header Bar**.

Awarding a Contract

After the Department of Transportation accepts the bid for a proposal, it must be **AWARDED** to the contracting company that submitted the bid and an Award Letter must be mailed to them.

From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	In the **Preconstruction** section, click **LETTINGS**.	The **Bid Letting Overview** page will appear.

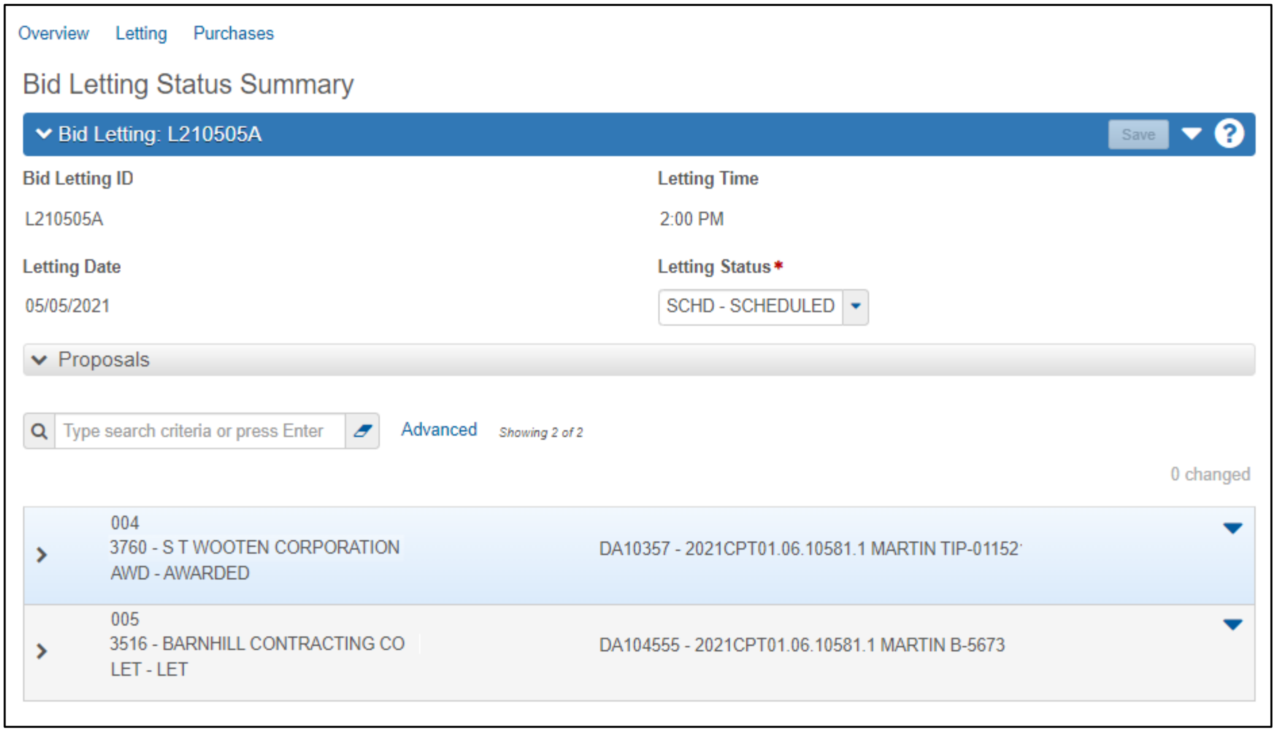


Step	Action	Result
2	Type ***the letting number*** in the search filter. The results will auto filter as you type.	The letting will appear in the results.
3	Click on the **LETTING NUMBER** you wish to open.	The **Bid Letting Summary** page will appear.
4	Click the **Status** Quick Link.	The **Bid Letting Status Summary** page will appear.

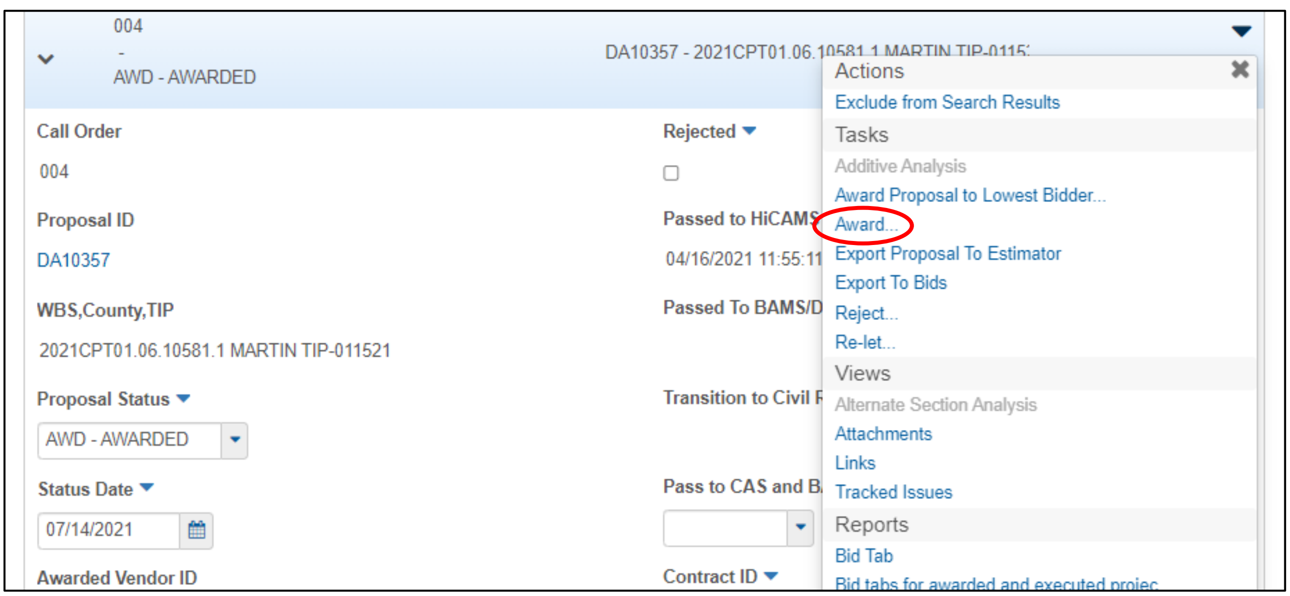
Continued on Following Page

Awarding a Contract

(continued)



5	Expand the proposal by clicking the arrow.	The proposal will appear.

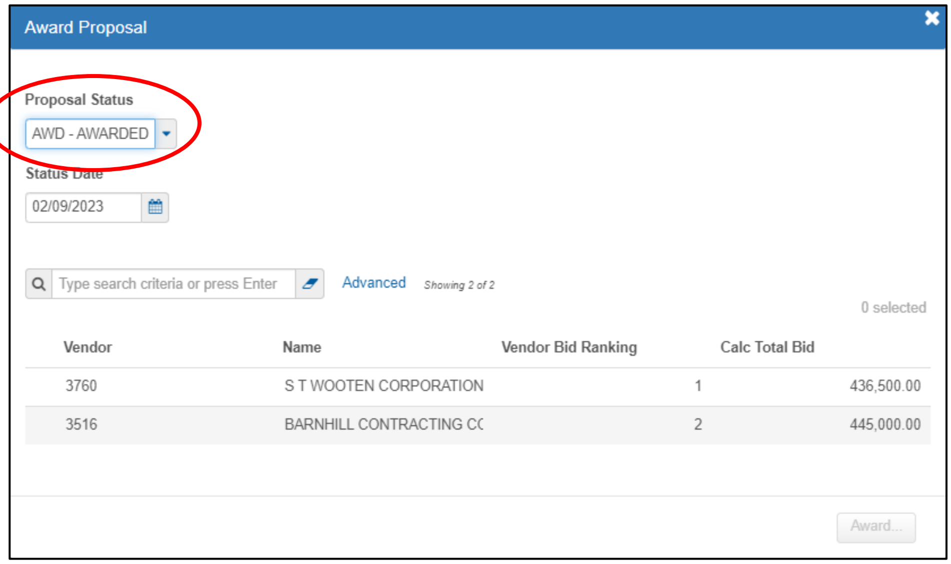


Continued on Following Page

Awarding a Contract

(continued)

6	From the drop-down arrow at the right side of the ***proposal*** select **AWARD…**.	The **Award Proposal** dialog will appear.



7	Select ***AWD*** (Awarded) from the drop-down list in the **PROPOSAL STATUS** field.	N/A

🗁**NOTE:** For a cluster, projects on one side are set to award and projects on the other side are set to **NCA** (Not Considered For Award).

8	Type ***the current date*** in the **STATUS DATE** field. 🗁**NOTE:** If you click the **CALENDAR** button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
9	Click to the left of ***the vendor you are awarding the contract*** from the list of vendors to select it.	A green check will appear to the left of the selected vendor.

Continued on Following Page

Awarding a Contract

(continued)

10	Click the **AWARD** button.	You will return to the **Bid Letting Status Summary** page. A ***Save Complete*** message will appear above the **Header Bar**.

Repeat this process for all Contracts that are to be awarded.

🗁**NOTE:** Contracts are passed to HiCAMS after the **Letting Status** has been set to **EXEC** (Execute).

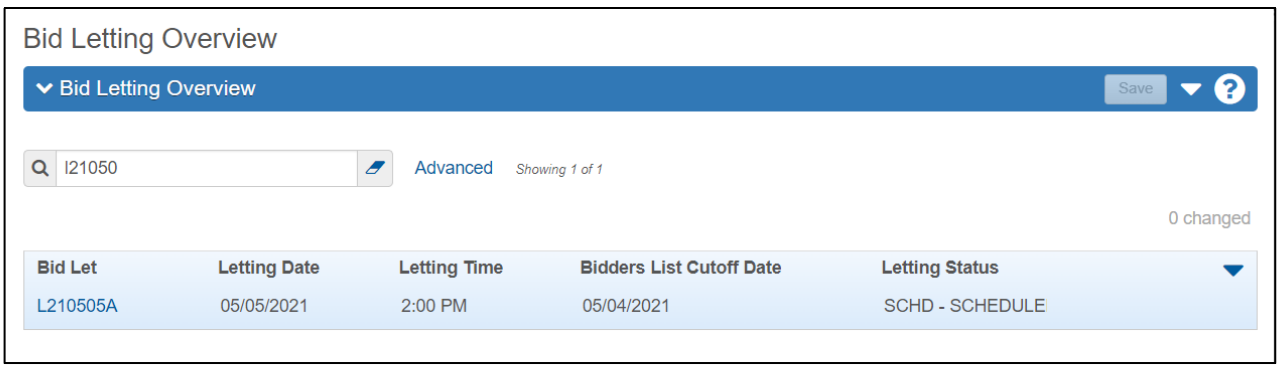
Rejecting a Contract

Occasionally, the Department of Transportation will reject a bid. When this occurs, the system must be updated to show that the low bid for a proposal has been rejected.

🗁**NOTE:** Within the system, we do not have the functionality to print Rejection Letters. This will continue to be a manual task.

From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	In the **Preconstruction** section, click **LETTINGS**.	The **Bid Letting Overview** page will appear.



2	Type ***the letting number*** in the search filter. The results will auto filter as you type.	The letting will appear in the results.
3	Click on the **LETTING NUMBER** you wish to open.	The **Bid Letting Summary** page will appear.
4	Click the **Status** Quick Link.	The **Bid Letting Status Summary** page will appear.

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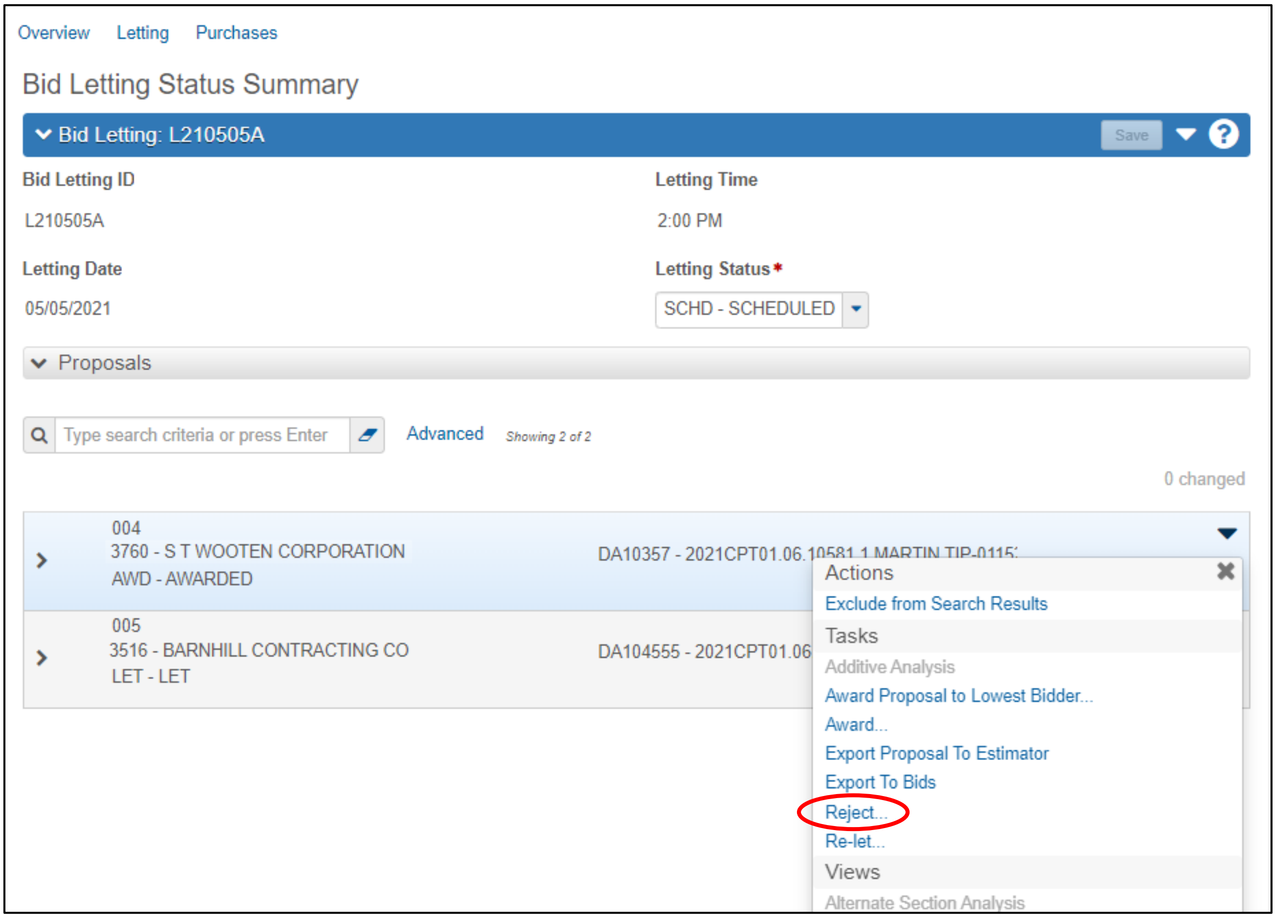
Rejecting a Contract

(continued)



5	If you need to view the proposal, expand it by clicking the arrow.	The proposal will appear.
6	From the drop-down arrow at the right side of the ***proposal*** select **REJECT…**.	The **Reject Proposal** dialog will appear.

Continued on Following Page

Rejecting a Contract

(continued)

7	Select ***REJ*** (Rejected) from the drop-down list in the **Proposal Status** field.	N/A
8	Type ***the current date*** in the **Status Date** field. 🗁**NOTE:** If you click the **Calendar** button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
9	Click the **Reject Proposal** button.	You will return to the **Bid Letting Status Summary** page. A ***Save Complete*** message will appear above the **Header Bar**.

Repeat this process for all Contracts that are to be rejected.

Executing a Contract

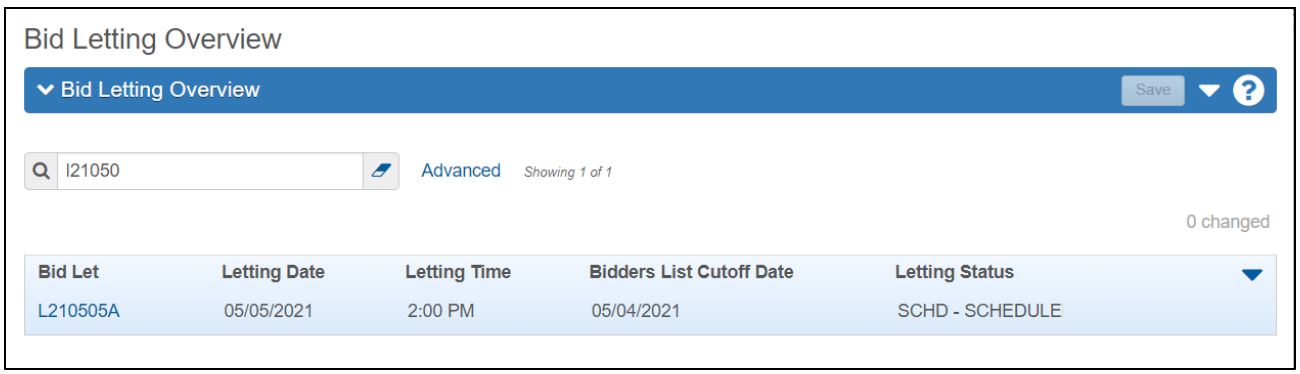
After a contract has been **Awarded**, the contracting company that submitted the winning bid must submit proper bonding company information back to NCDOT. When this information is received, the contract must then be **Executed**. This requires a change in the status of the contract to **Executed**.

Upon completion, information on the contract will be passed overnight to HiCAMS.

From the ***AASHTOWare Project Dashboard:***

Entering the Bond Company

Step	Action	Result
1	In the **Preconstruction** section, click **LETTINGS**.	The **Bid Letting Overview** page will appear.



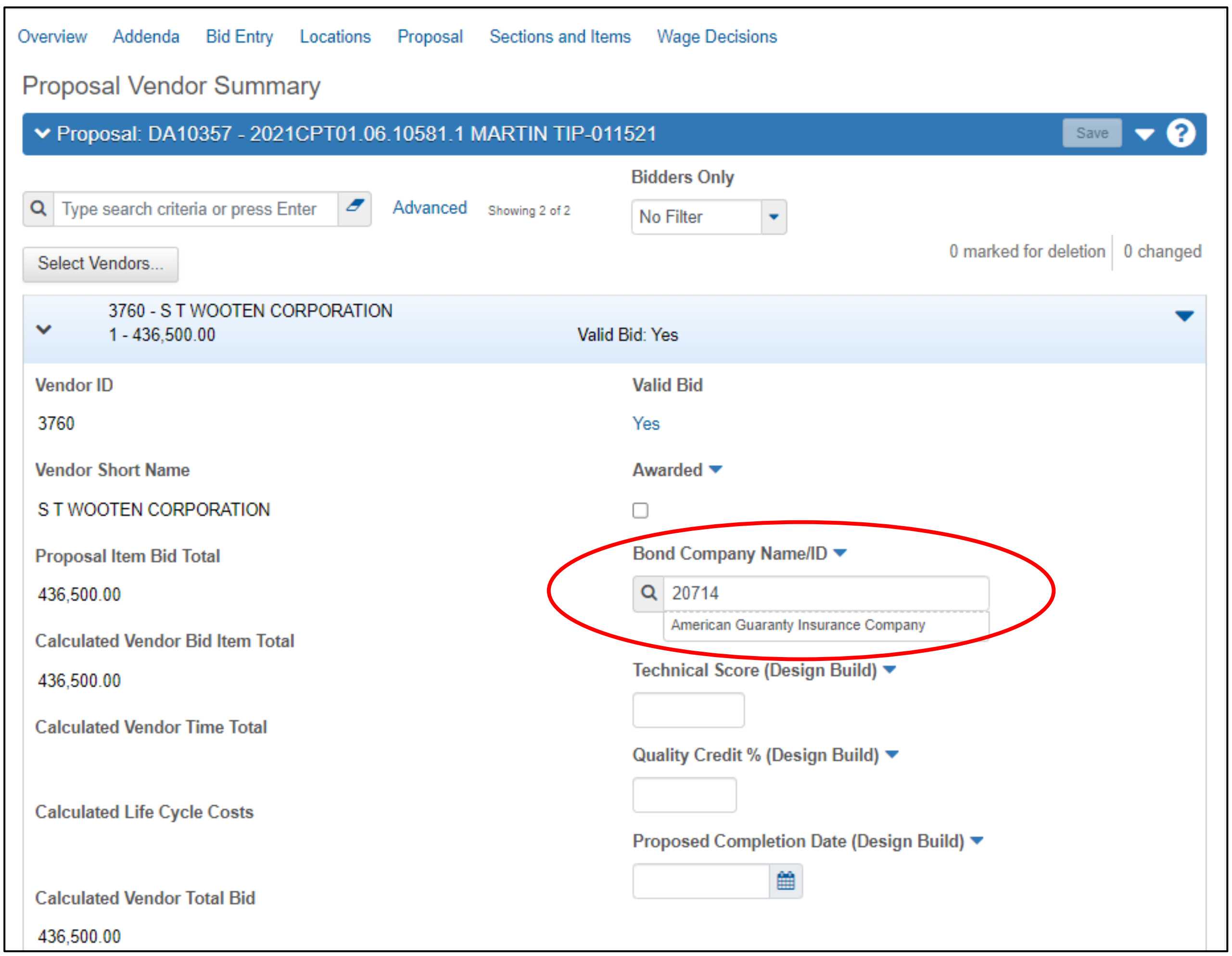
2	Type ***the letting number*** in the search filter. The results will auto filter as you type.	The letting will appear in the results.
3	Click on the **LETTING NUMBER** you wish to open.	The **Bid Letting Summary** page will appear.
4	Click the **Proposals** tab.	The list of proposals in the letting will appear.

Continued on Following Page

Executing a Contract

(continued)

5	Click on ***the proposal you have imported bids for***.	The **Proposal Summary** page will appear.
6	Click the ***Proposal Vendors*** Quick Link.	The **Proposal Vendor Summary** page will appear.
	If a vendor record is expanded, collapse it to view the entire list.	
7	Expand the awarded vendor record by clicking the arrow.	The vendor record will appear.



Continued on Following Page

Executing a Contract

(continued)

8	Select ***the bond company*** from the drop-down list in the **BOND COMPANY NAME/ID** field. 🗁**NOTE:** You will be able to parse the list by typing the company name or ID number.	N/A

☠ **IMPORTANT** If there is no bond company, select company **23697**.

9	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Executing the Contract

From the ***Bid Letting Summary*** page***:***

Step	Action	Result
1	Click the **Status** Quick Link.	The **Bid Letting Status Summary** page will appear.
2	Expand the proposal by clicking the ☒ arrow.	The proposal will appear.

Continued on Following Page

Executing a Contract

(continued)

3	Select ***EXEC*** from the drop-down list in the **PROPOSAL STATUS** field.	N/A
4	Type ***the current date*** in the **STATUS DATE** field. 🗁**NOTE:** If you click the **CALENDAR** button, a popup calendar will allow you to select the date so that it appears in the field.	N/A
5	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete message*** will appear above the **Header Bar**.

Contract Re-Execution

To re-execute, you must change the value in the **PROPOSAL STATUS** field back to ***AWD***, then back to ***EXEC***.

This has been implemented to reduce duplicates being sent to HiCAMS.

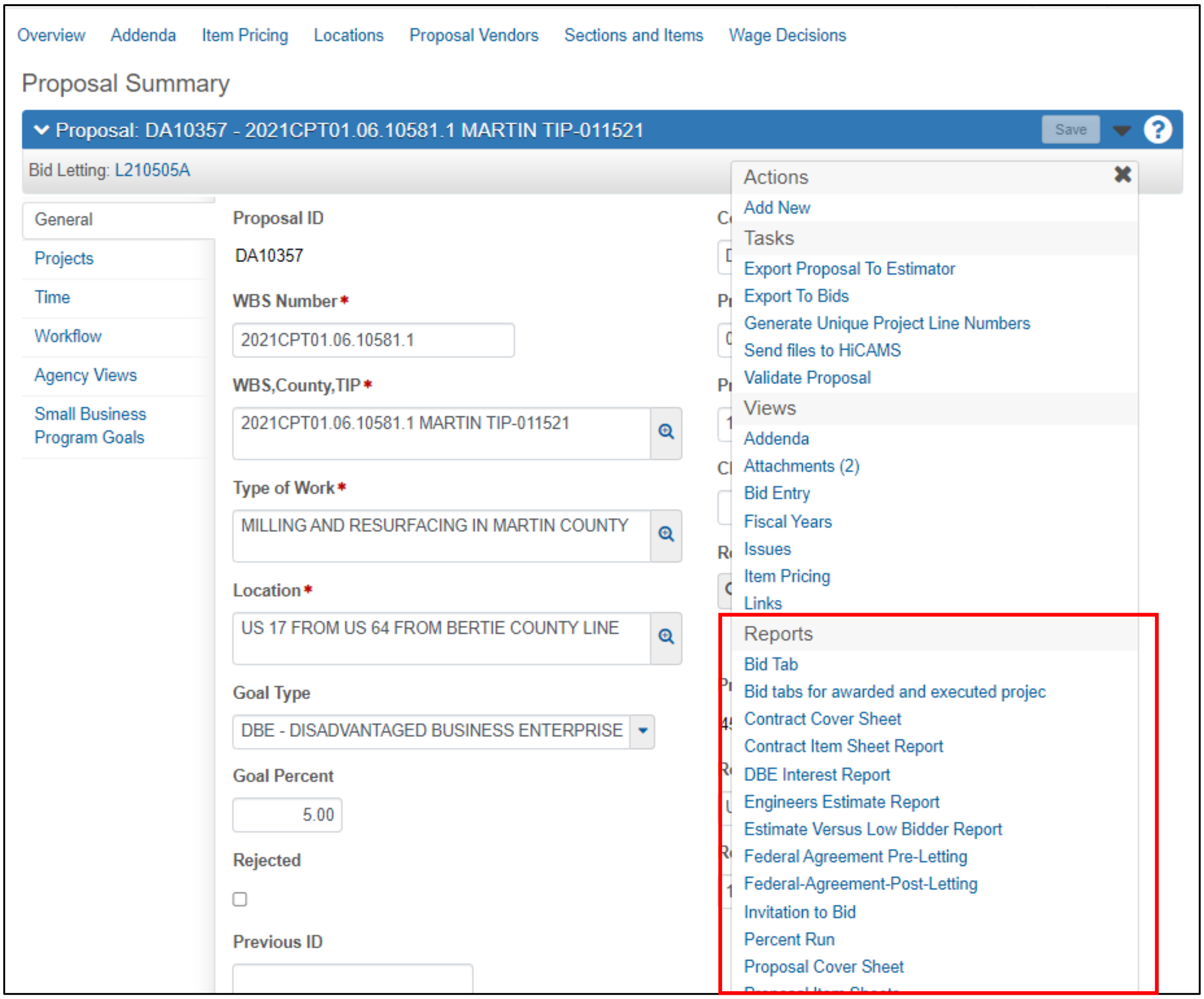
To re-execute:

1. Change the status from **EXEC** to **AWD** and **SAVE**.
2. Change the **STATUS DATE** to ***the current date*** and **SAVE**.
3. Change the status back to **EXEC**.
4. Change the **STATUS DATE** to ***the current date*** and **SAVE**.

Chapter 12 Reports

Generating Reports from a Page

Depending on where you are in the system, you will be able to run reports. To generate a report based on the information on the current page, select a report from the **Reports** section of the drop-down list in the **Header Bar**.



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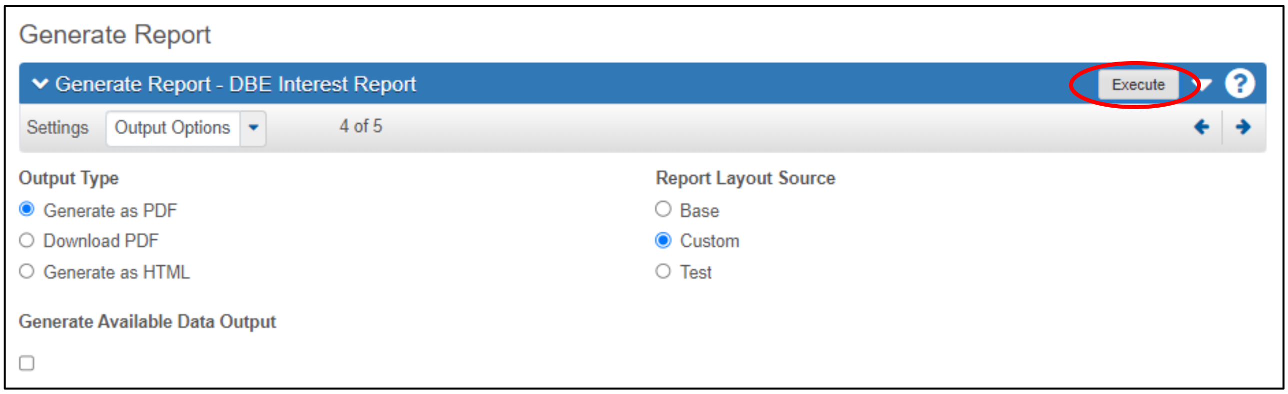
Generating Reports from a Page

(continued)

When you select a report, a page like this will appear.

It will allow you to customize the report.



You can deselect anything you don't want to appear on the report.

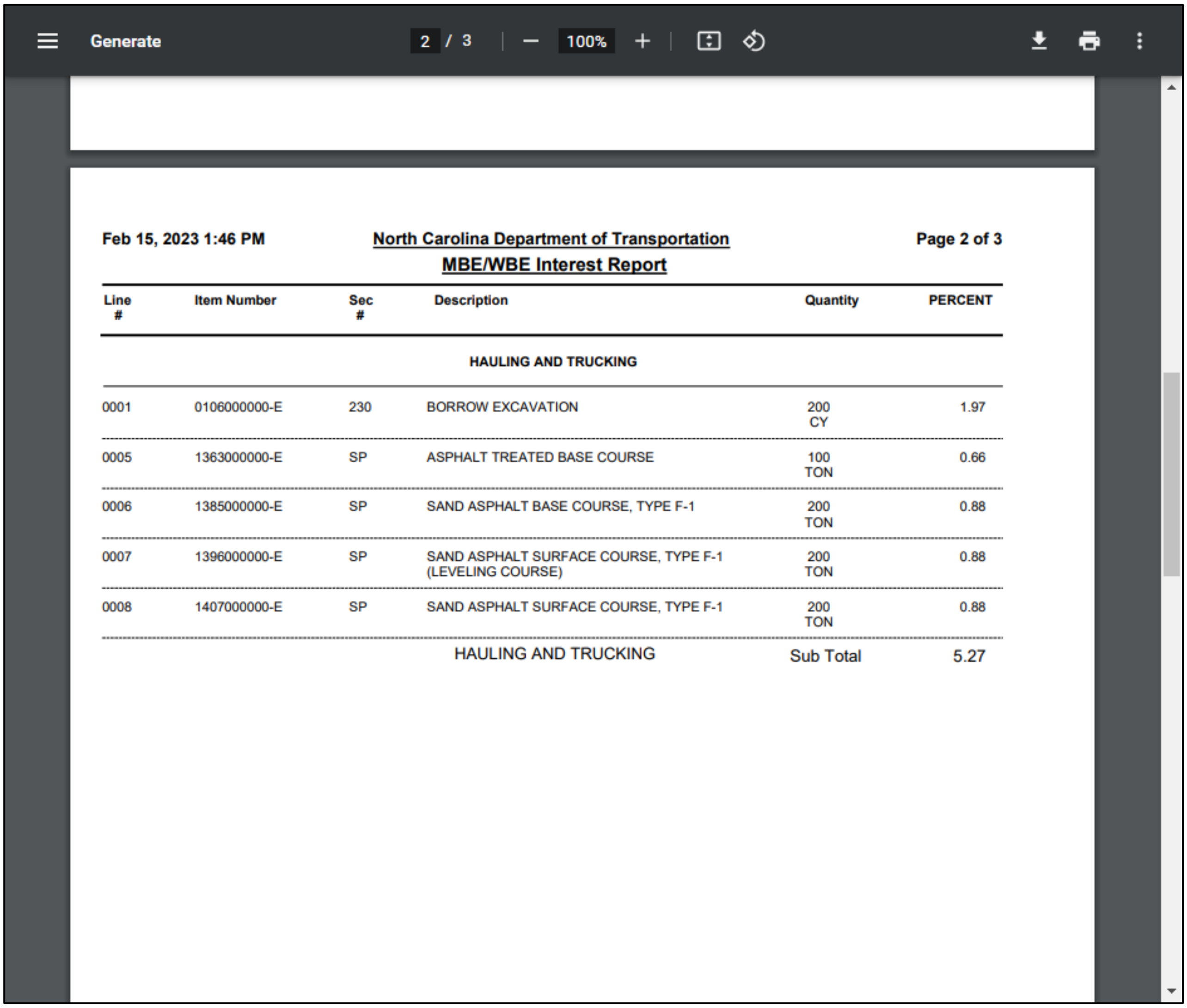
Click the **EXECUTE** button to run the report.

The report will be displayed in a new web browser tab.

Continued on Following Page

Generating Reports from a Page

(continued)



Feb 15, 2023 1:46 PM

North Carolina Department of Transportation

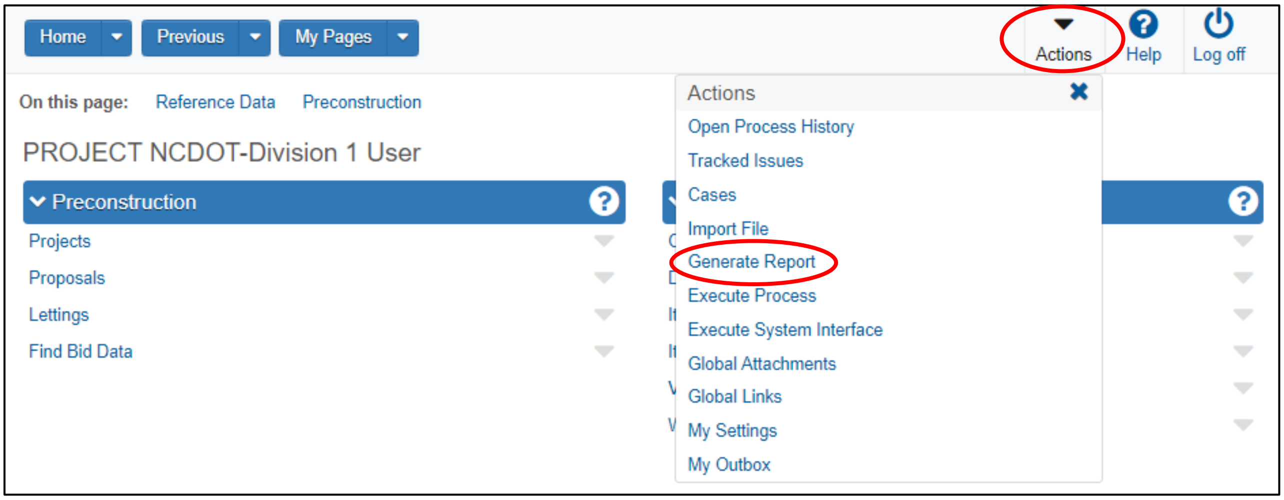
MBE/WBE Interest Report

Page 2 of 3

Line #	Item Number	Sec #	Description	Quantity	PERCENT
			HAULING AND TRUCKING		
0001	0106000000-E	230	BORROW EXCAVATION	200 CY	1.97
0005	1363000000-E	SP	ASPHALT TREATED BASE COURSE	100 TON	0.66
0006	1385000000-E	SP	SAND ASPHALT BASE COURSE, TYPE F-1	200 TON	0.88
0007	1396000000-E	SP	SAND ASPHALT SURFACE COURSE, TYPE F-1 (LEVELING COURSE)	200 TON	0.88
0008	1407000000-E	SP	SAND ASPHALT SURFACE COURSE, TYPE F-1	200 TON	0.88
			HAULING AND TRUCKING	Sub Total	5.27

Generating Global Reports

If you want to generate reports based on multiple projects, proposals, or lettings, you can launch them directly from the **Actions Menu**.



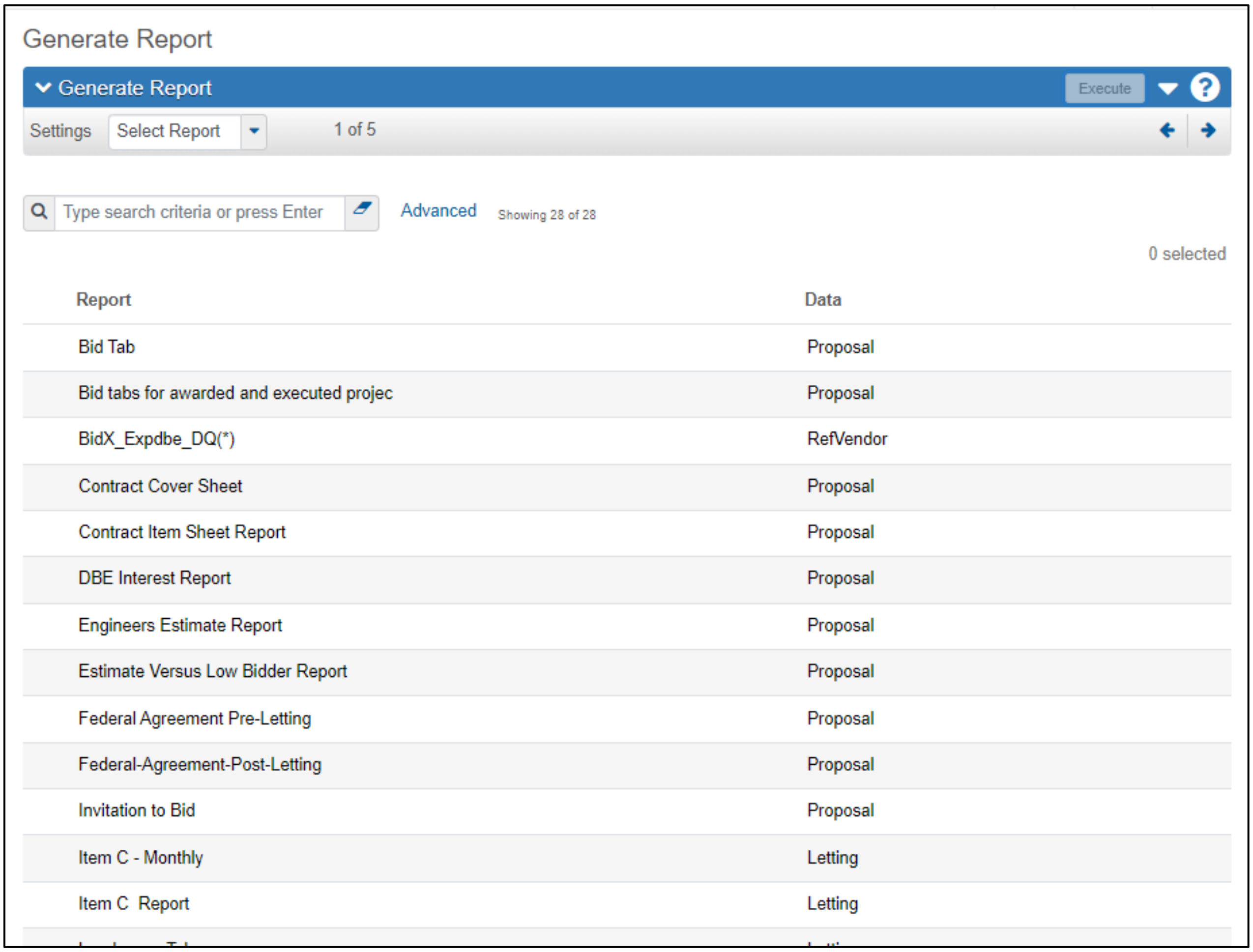
From anywhere in ***AASHTOWare Project:***

Step	Action	Result
1	Click the **ACTIONS MENU** button at the top of the page.	The actions menu will expand into a drop-down list.
2	Select ***Generate Report*** from the drop-down list.	The **Generate Report** page will appear. This page lists all the reports you can generate.

Continued on Following Page

Generating Global Reports

(continued)

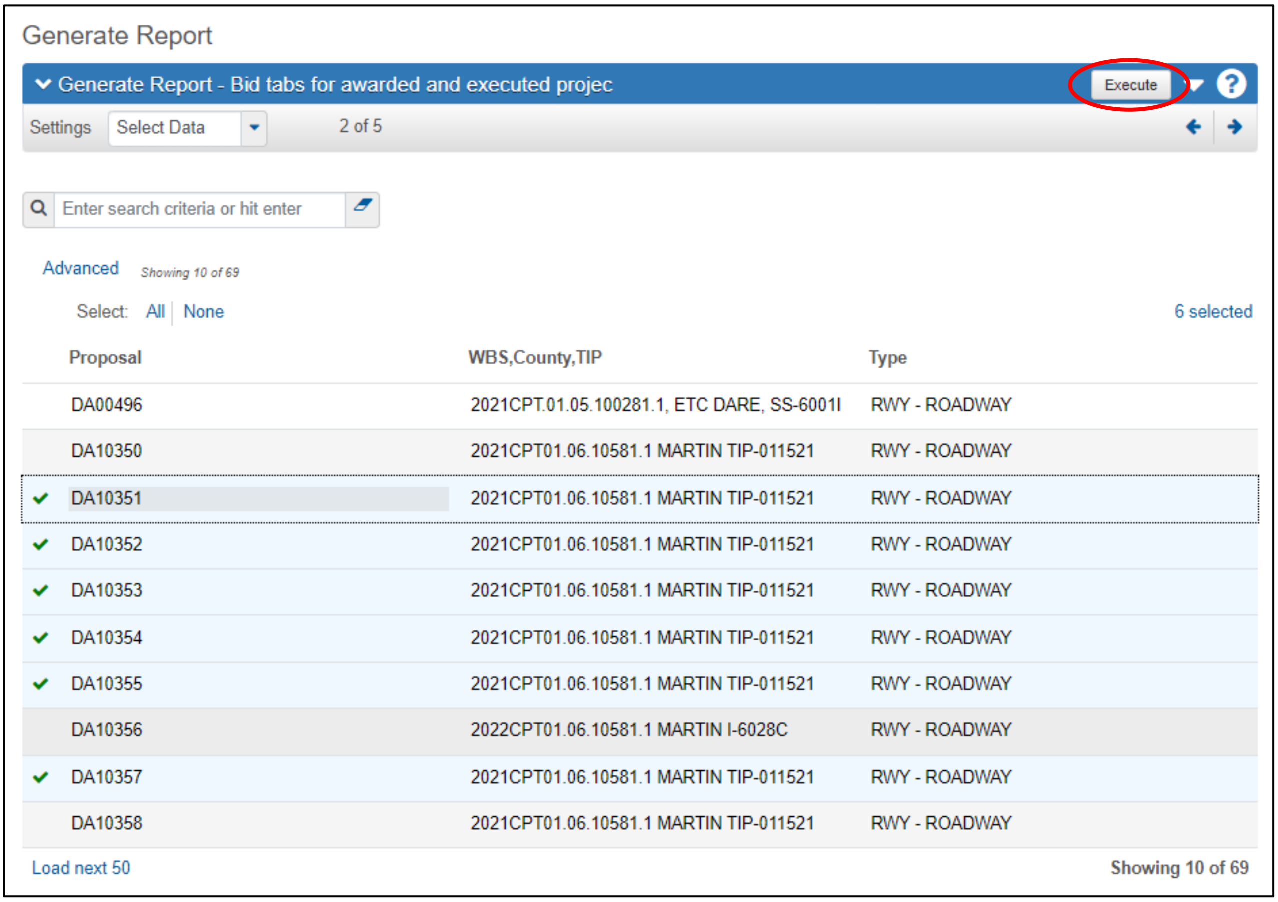


3	Click on ***the report you wish to generate***.	A page will appear that will allow you to select options for the report.

Continued on Following Page

Generating Global Reports

(continued)



You will be able to search for specific Projects, Proposals, or Lettings or Vendors, depending on the report you selected from the previous page.

4	Type ***the criteria you wish to search by*** in the **SEARCH** field. (Project, Proposal, Letting)	The list will filter as you type.
5	Select the row(s) that contain the Project(s), Proposal(s) or Letting(s) you wish to include in your report.	A green check mark ✔ will appear next to your selections.

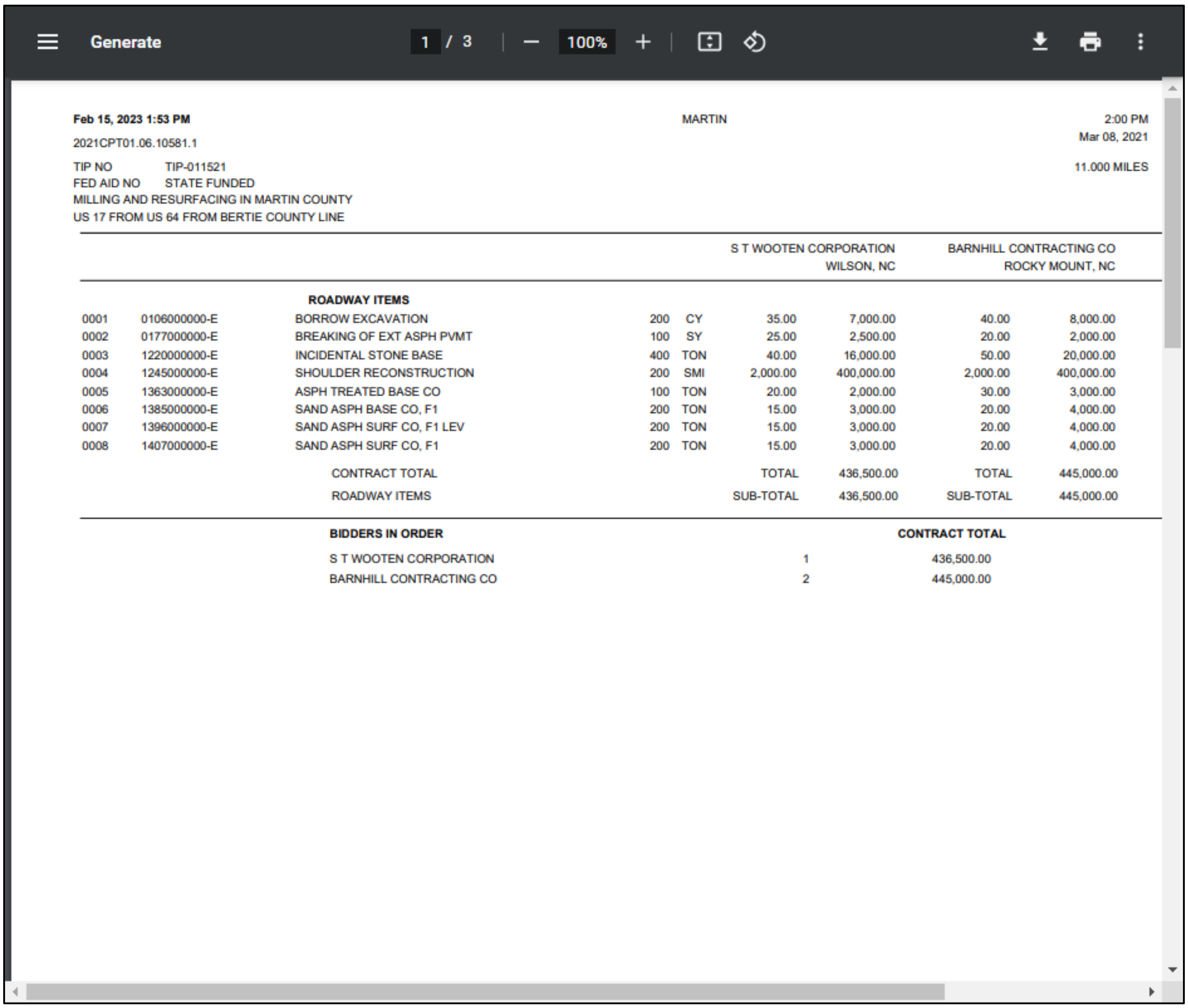
🗁**NOTE:** Once you have selected a record, you will still be able to go back and select additional records without losing that selection.

Continued on Following Page

Generating Global Reports

(continued)

6	Click the **EXECUTE** button in the **Header Bar**.	The report will be displayed in a new web browser tab.


Generate 1 / 3 100%

Feb 15, 2023 1:53 PM MARTIN 2:00 PM
2021CPT01.06.10581.1 Mar 08, 2021
TIP NO TIP-011521 11.000 MILES
FED AID NO STATE FUNDED
MILLING AND RESURFACING IN MARTIN COUNTY
US 17 FROM US 64 FROM BERTIE COUNTY LINE

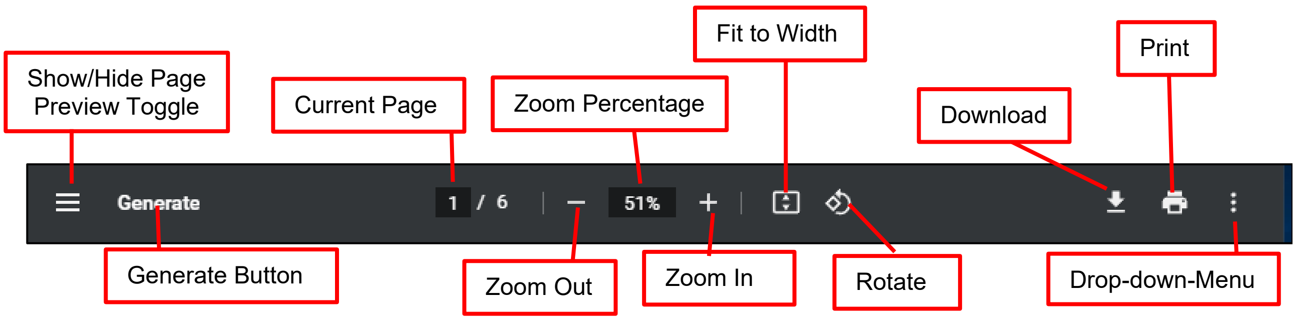
					S T WOOTEN CORPORATION	WILSON, NC	BARNHILL CONTRACTING CO	ROCKY MOUNT, NC
		ROADWAY ITEMS						
0001	0106000000-E	BORROW EXCAVATION	200	CY	35.00	7,000.00	40.00	8,000.00
0002	0177000000-E	BREAKING OF EXT ASPH PVMT	100	SY	25.00	2,500.00	20.00	2,000.00
0003	1220000000-E	INCIDENTAL STONE BASE	400	TON	40.00	16,000.00	50.00	20,000.00
0004	1245000000-E	SHOULDER RECONSTRUCTION	200	SMI	2,000.00	400,000.00	2,000.00	400,000.00
0005	1363000000-E	ASPH TREATED BASE CO	100	TON	20.00	2,000.00	30.00	3,000.00
0006	1385000000-E	SAND ASPH BASE CO, F1	200	TON	15.00	3,000.00	20.00	4,000.00
0007	1396000000-E	SAND ASPH SURF CO, F1 LEV	200	TON	15.00	3,000.00	20.00	4,000.00
0008	1407000000-E	SAND ASPH SURF CO, F1	200	TON	15.00	3,000.00	20.00	4,000.00
		CONTRACT TOTAL			TOTAL	436,500.00	TOTAL	445,000.00
		ROADWAY ITEMS			SUB-TOTAL	436,500.00	SUB-TOTAL	445,000.00

BIDDERS IN ORDER		CONTRACT TOTAL
S T WOOTEN CORPORATION	1	436,500.00
BARNHILL CONTRACTING CO	2	445,000.00

If you selected multiple projects/proposals/lettings, they will appear one after another in the same report window.

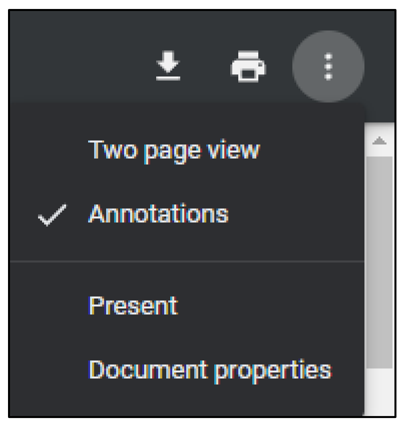
The Report Toolbar

This toolbar is at the top of all reports.



At the right side of the Toolbar is a drop-down menu.

The three vertical dots can be clicked to reveal the following menu which contains these options.

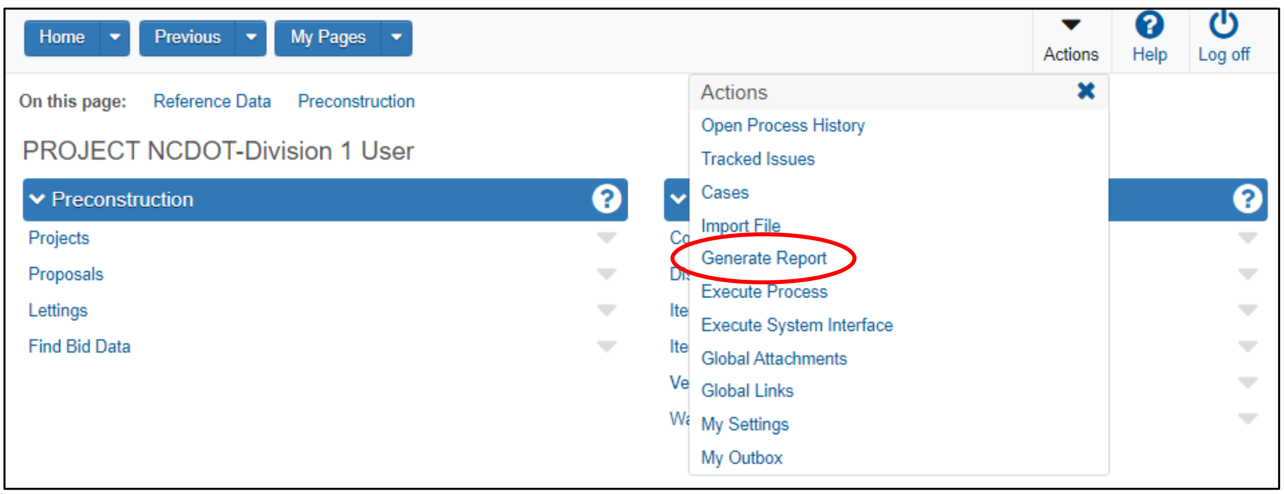


Creating the Master Pay Item List Report

This procedure will show you how to generate the **Master Pay Item List Report**. Once created, this file can be posted to the Connect NCDOT website to be accessed by internal and external users.

From the ***AASHTOWare Project Dashboard:***

Step	Action	Result
1	Click the **ACTIONS MENU** button at the top of the page.	The actions menu will expand into a drop-down list.
2	Select ***Generate Report*** from the drop-down list.	The **Generate Report** page will appear. This page lists all the reports you can generate.



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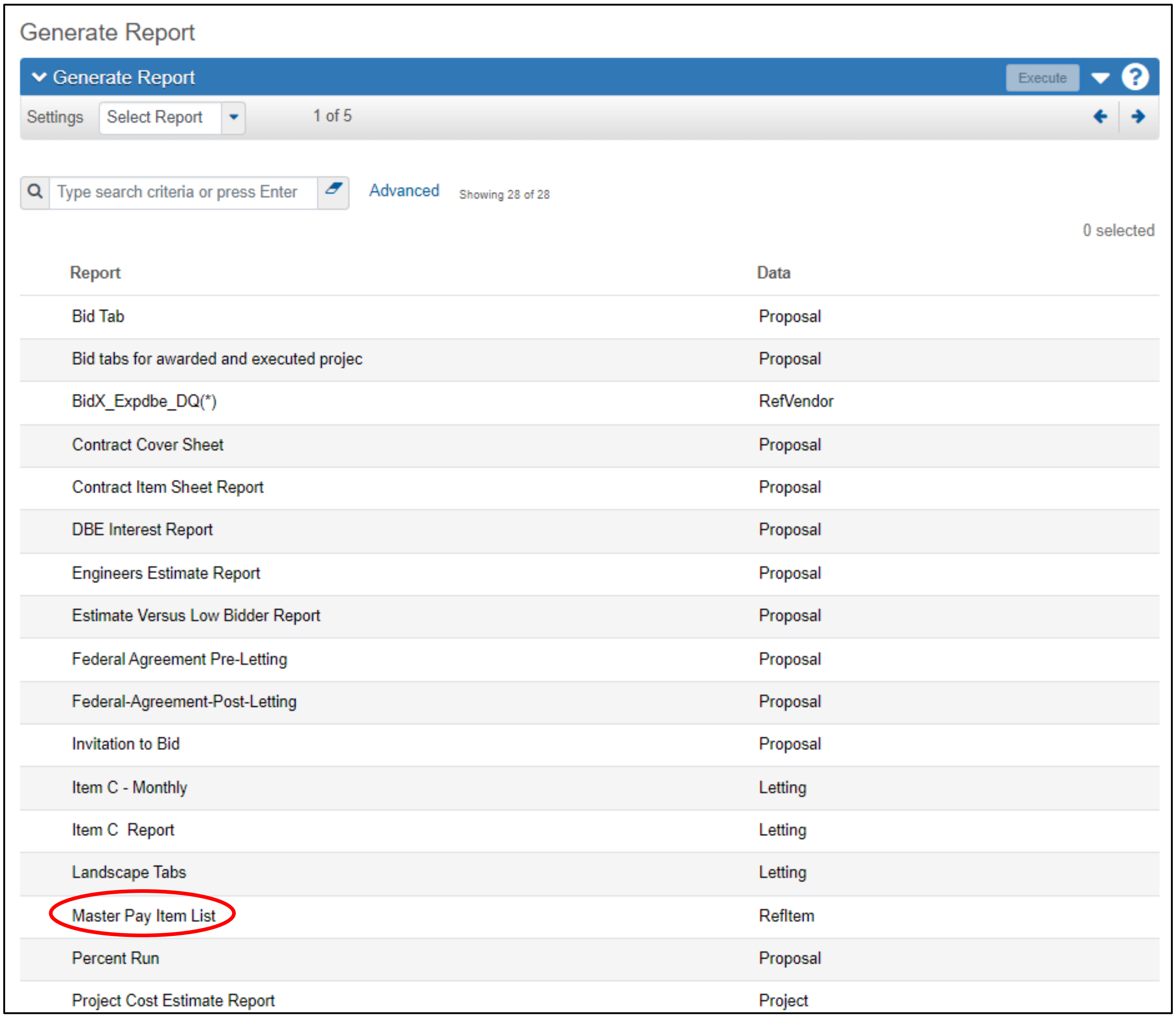
Creating the Master Pay Item List Report

(continued)

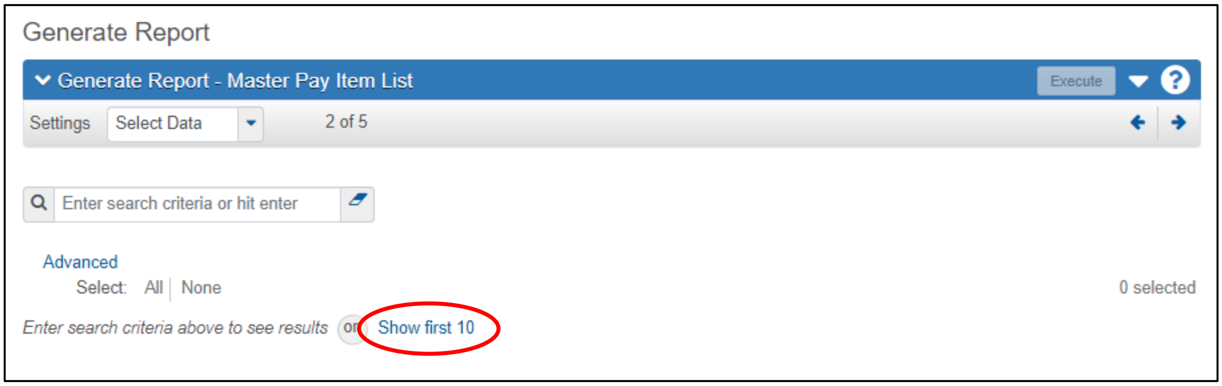


3	Select ***Master Pay Item List***.	The **Generate Report – Master Pay Item List** page will appear.

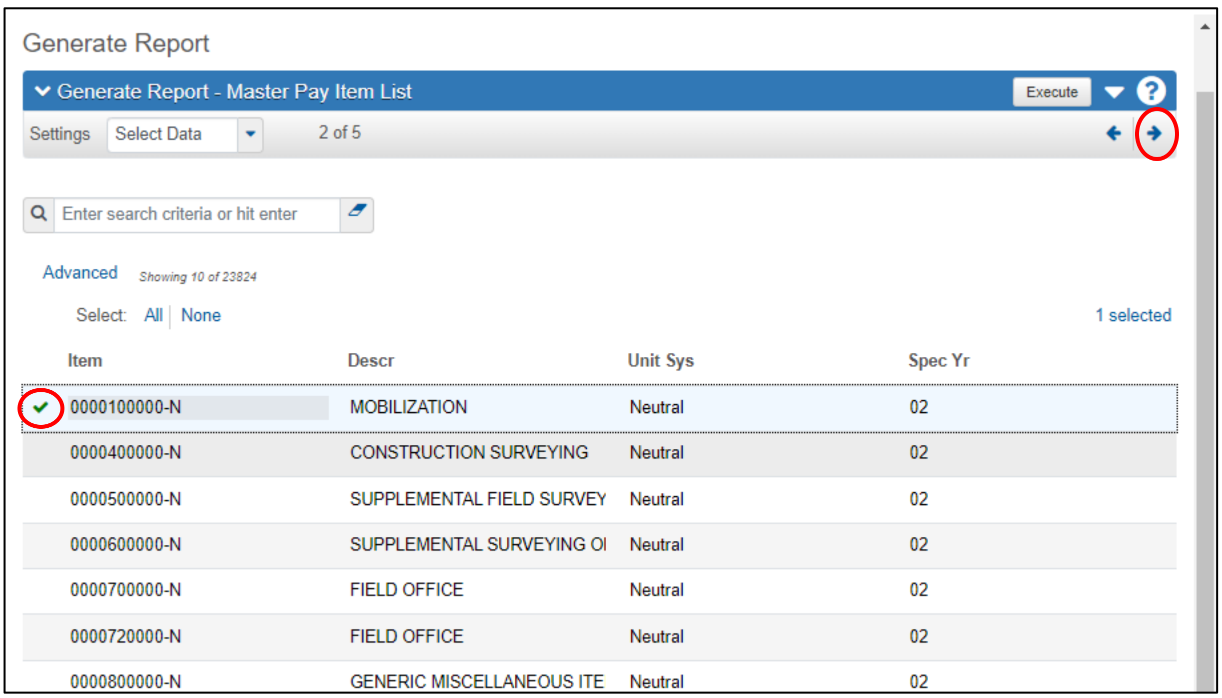
Continued on Following Page

Creating the Master Pay Item List Report

(continued)



4	In order for the report to run, one item must be selected. Click the **SHOW FIRST 10** link.	The first 10 items will appear.

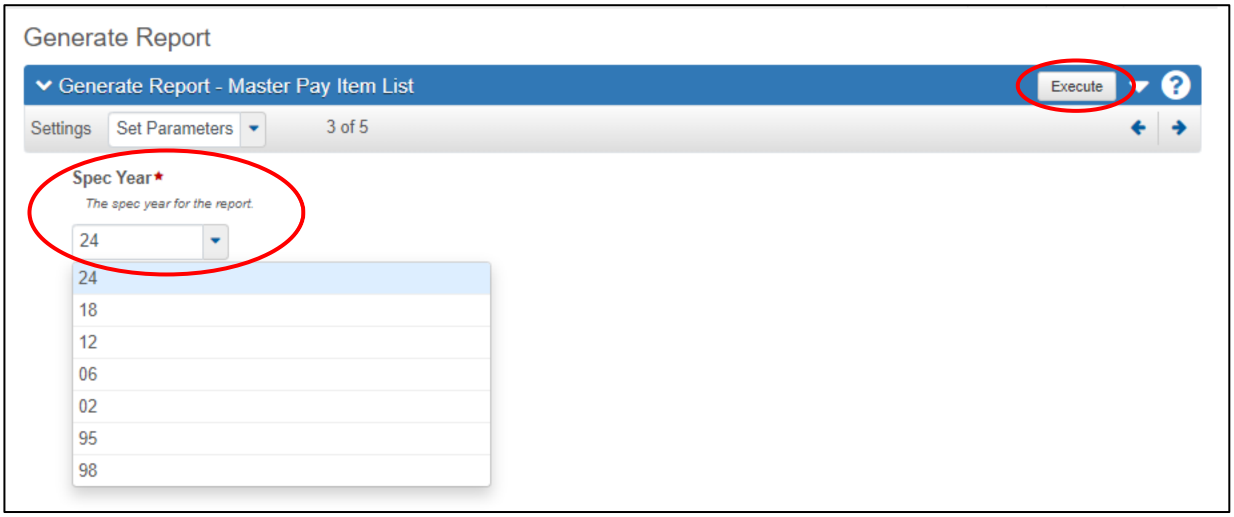


5	Select the first item.	A green check mark will appear next to the item.
6	Click the **NEXT** arrow.	The **Set Parameters** page will appear.

Continued on Following Page

Creating the Master Pay Item List Report

(continued)

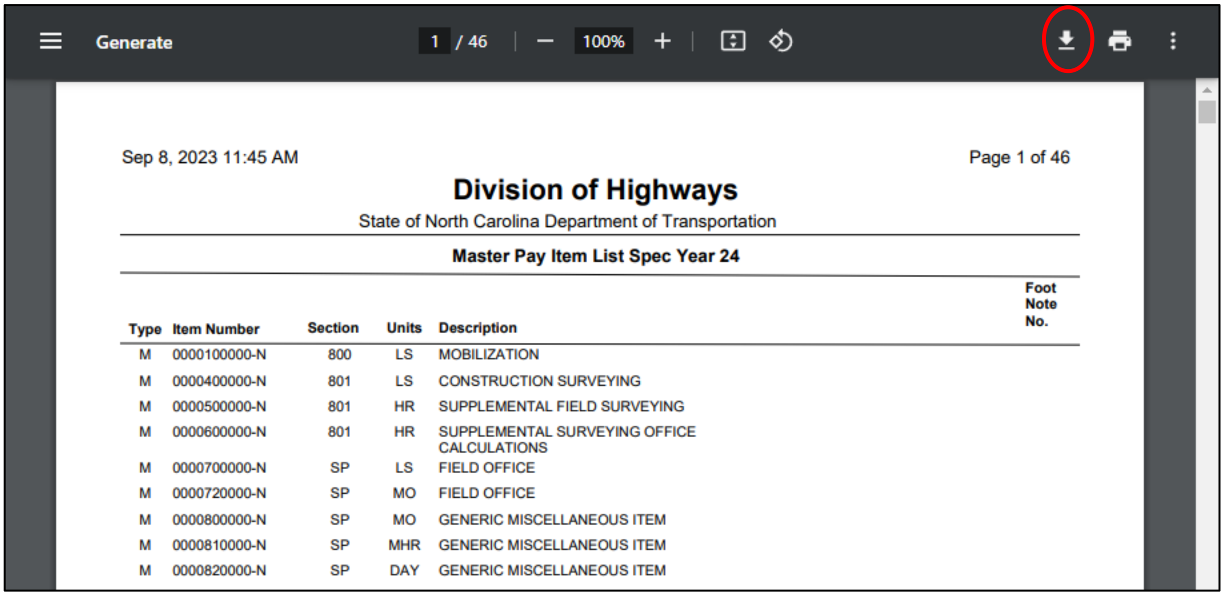


7	Select the ***Spec Year*** from the drop-down list in the **SPEC YEAR** field.	N/A
8	Click the **EXECUTE** button.	The report will open in a new browser tab.

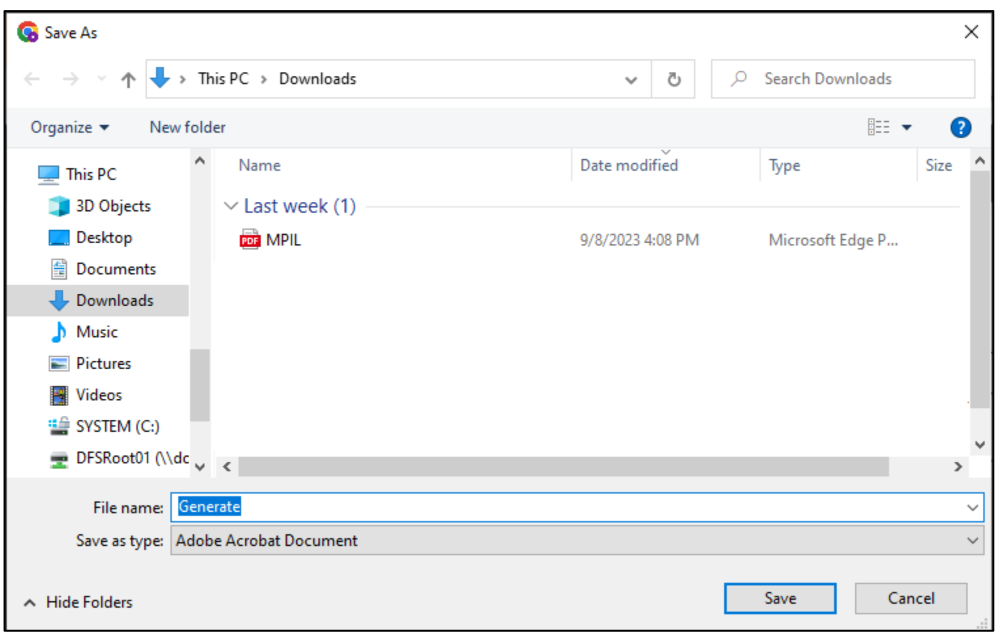
Continued on Following Page

Creating the Master Pay Item List Report

(continued)



9	To download the report, click the download button in the top, right corner of the window.	The report will be saved to your **Downloads** folder as ***Generate***. You can change this filename.

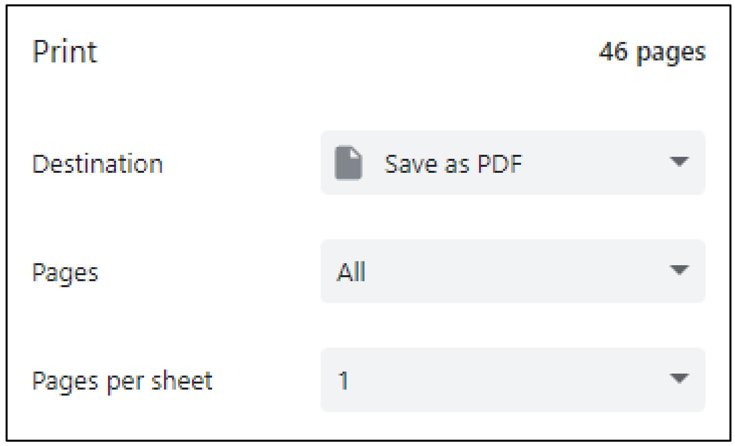


Continued on Following Page

Creating the Master Pay Item List Report

(continued)

You will also be able to click the **PRINT** button to save the report as a PDF. The following window will appear.

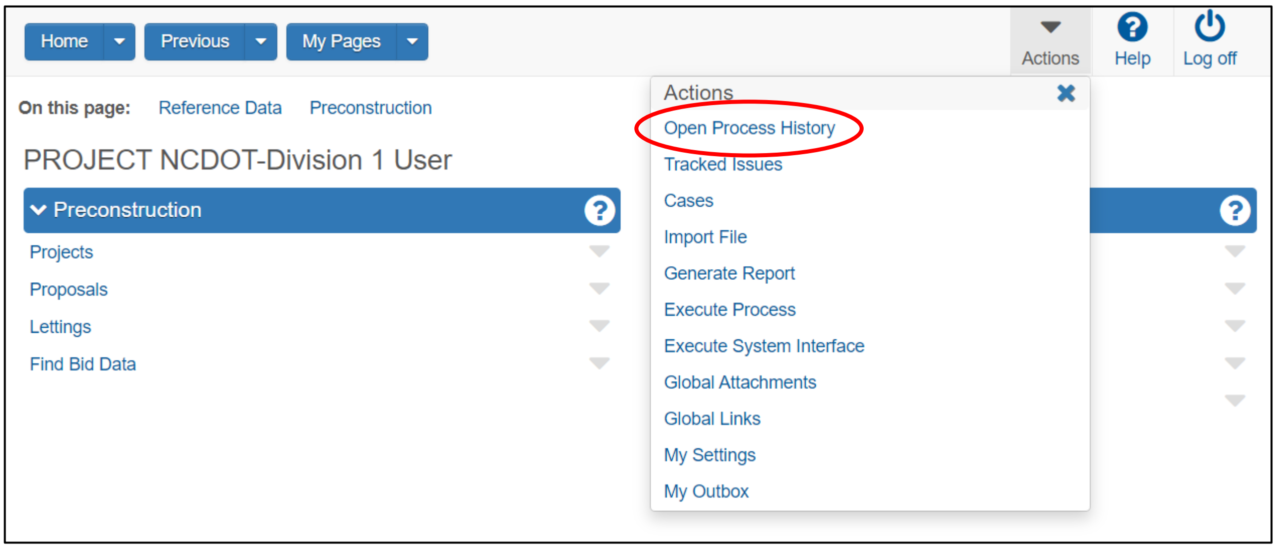


After you have saved the report as a PDF, you can post it to the Connect NCDOT website.

Chapter 13 System Maintenance

Deleting a Process

When you run a process, historical records of that process will be kept in the system until you delete them. In order to keep the process page clean, so that process records aren't easily confused, you can delete the records you no longer need.

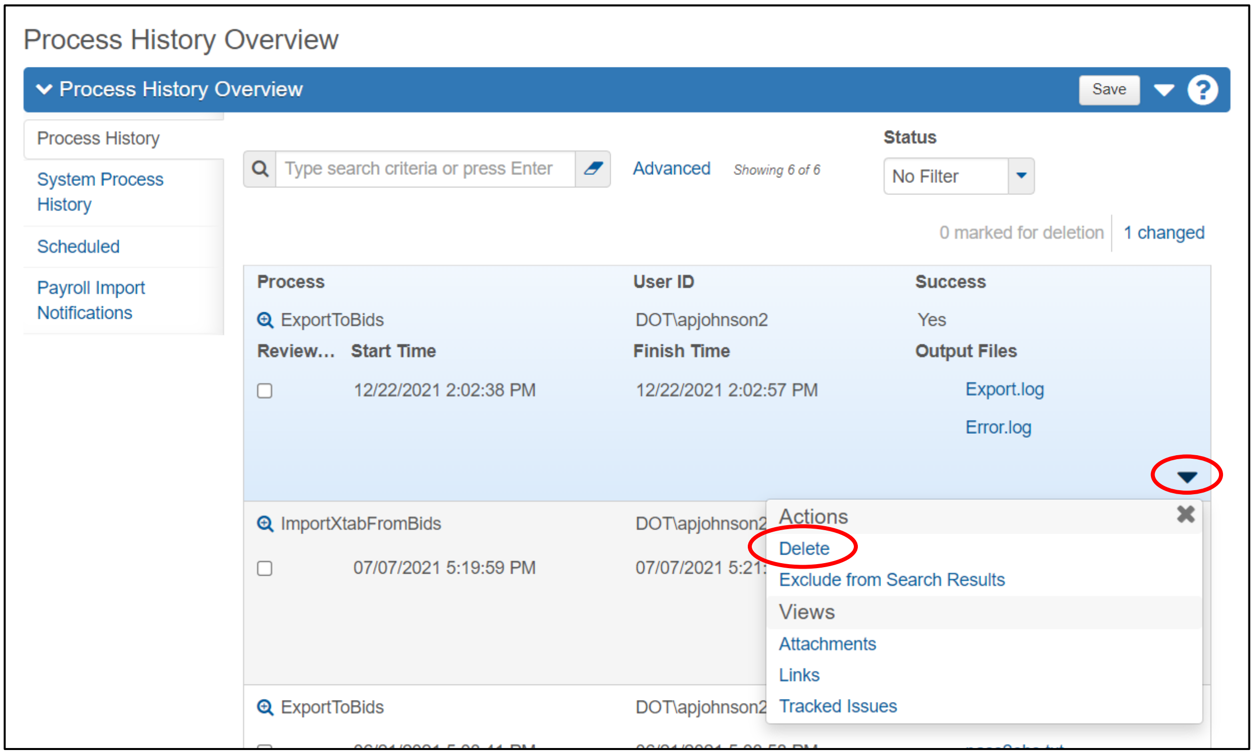


Step	Action	Result
1	From the ACTIONS menu at the top of the page, select ***Open Process History***.	The **Process History Overview** page will appear.
2	Locate the process you want to delete. 🗁**NOTE:** Processes will be displayed with the most recent at the top of the page. Currently running processes will appear at the bottom until they have finished running.	

Continued on Following Page

Deleting a Process

(continued)



3	Click the ***down arrow*** at the end of the row containing the process you wish to delete.	A drop-down menu will appear.
4	Select ***Delete*** from the menu.	The drop-down arrow will change to an **undo arrow**. A ***There are unsaved changes*** message will appear above the **Header Bar**.

🗁**NOTE:** To reverse the delete, click the **undo arrow**.

5	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Pulling a Project from a Letting

You will need to wait for the following to happen before performing this procedure:

- The official letter distribution
- The letter to be posted to the **Connect NCDOT** Letting site

Step	Action
1	Remove the EBSX file from **Bid Express** and add an Alert on the letting page there.
2	The EBSX on the **Connect NCDOT** site should be removed. If this has not happened, ask for it to be removed.

In AWP, from the **Bid Letting Summary** Page, **Proposals** tab:

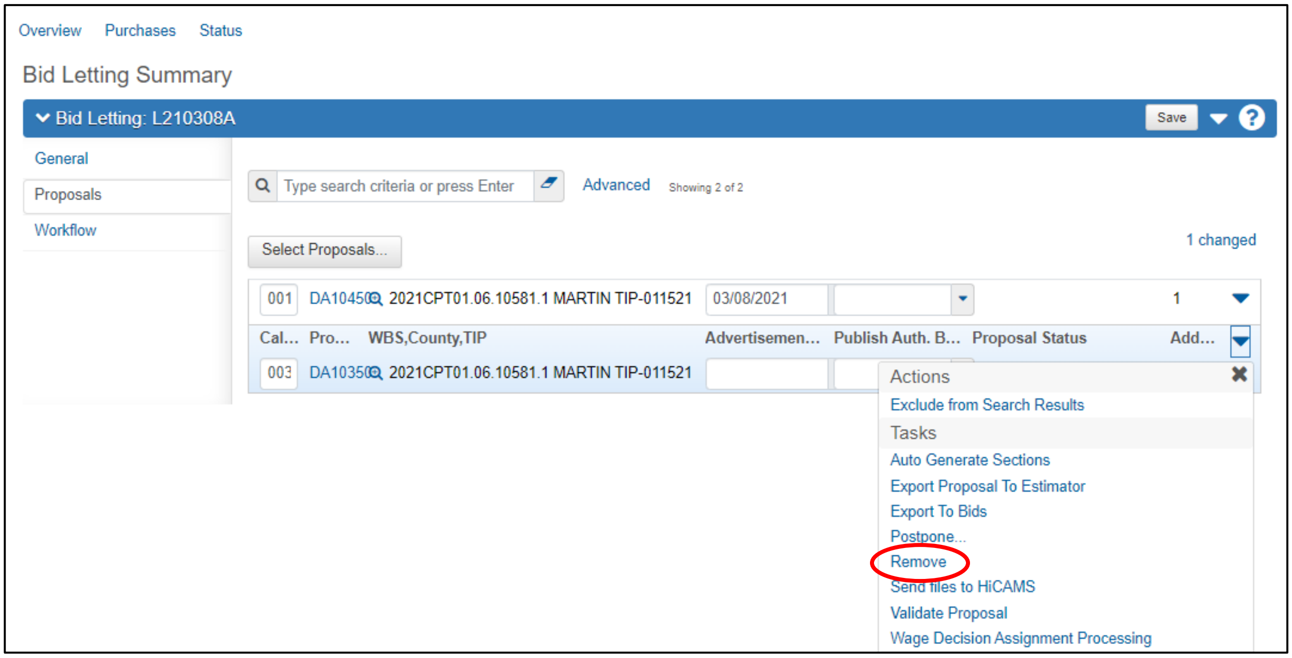
3	Clear the **ADVERTISEMENT DATE** field for the pulled proposal.	
4	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.

Continued on Following Page

Pulling a Project from a Letting

(continued)

5	Clear the **PUBLISH AUTH BIDDERS** field for the pulled proposal.	
6	Click the **SAVE** button in the **Header Bar**.	A ***Save Complete*** message will appear above the **Header Bar**.



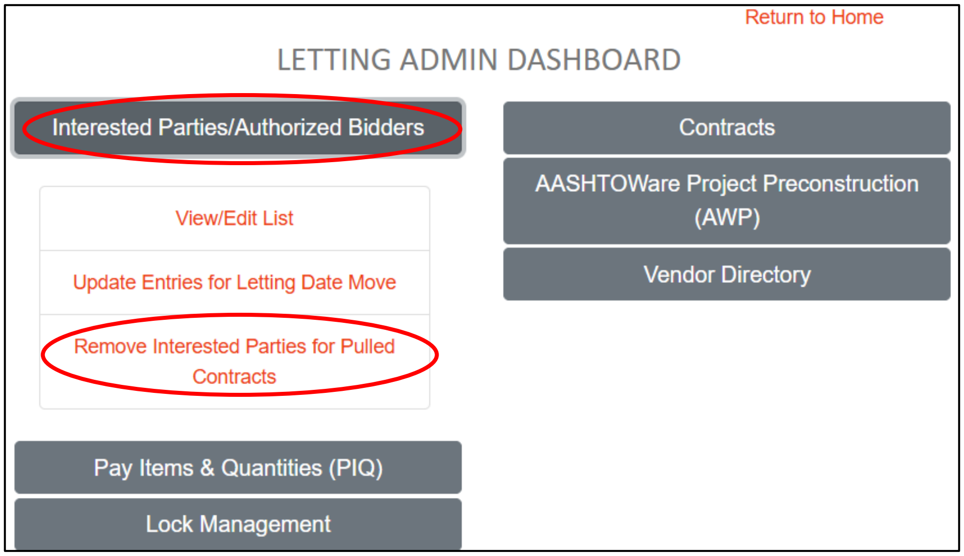
7	Click the down arrow on the right of that proposal.	A drop-down menu will appear.
8	Select **REMOVE** from the menu.	A ***Save Complete*** message will appear above the **Header Bar**.

Continued on Following Page

Pulling a Project from a Letting

(continued)

From the **Preconstruction Letting Admin Dashboard**:

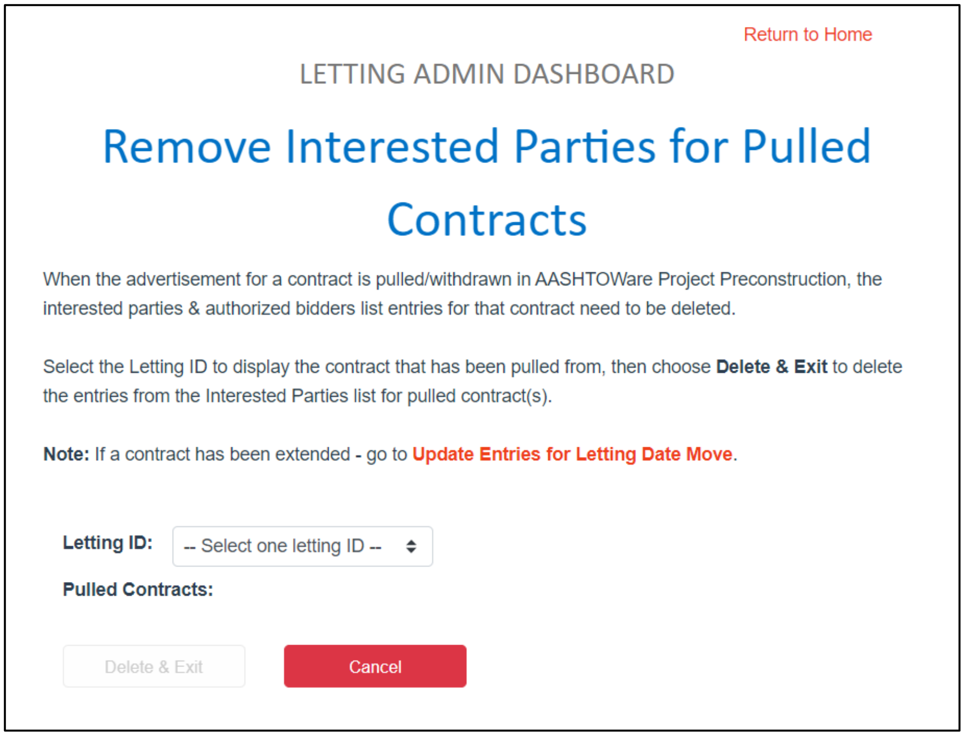


9	Click the **INTERESTED PARTIES/AUTHORIZED BIDDERS** button.	
10	Click on **REMOVE INTERESTED PARTIES FOR PULLED CONTRACTS**.	The **Remove Interested Parties for Pulled Contracts** page will appear.

Continued on Following Page

Pulling a Project from a Letting

(continued)



11	In the drop-down list in the **LETTING ID** field, select the Letting that the puled project was a part of.	The contract number of the pulled project should appear in the **PULLED CONTRACTS** field.
12	If everything is correct, click the **DELETE & EXIT** button.	A confirmation message will appear.
12	Click the **OK** button.	An additional deletion confirmation message will appear.
13	Click the **OK** button.	The Project has been pulled from the Letting.

Appendix A Contract Times

Contract Times Clause Type

AD	Not Used
ADCD	[Intermediate] Availability Date & Calendar Days
CD	Not Used
DS	[Intermediate] Daily Suspension
DT	Not Used
FACD	[Final] Availability & Calendar Days
FCD	[Final] Availability & Completion Date
FRAD	[Final] Range Availability & Completion Date
ICD	[Intermediate] Availability & Completion Date
IDCD	[Intermediate] Range of Dates & Calendar Days
IRAD	[Intermediate] Range Availability & Completion Date
RDCD	[Final] Range of Dates & Calendar Days
TR	[Intermediate] Time Restriction

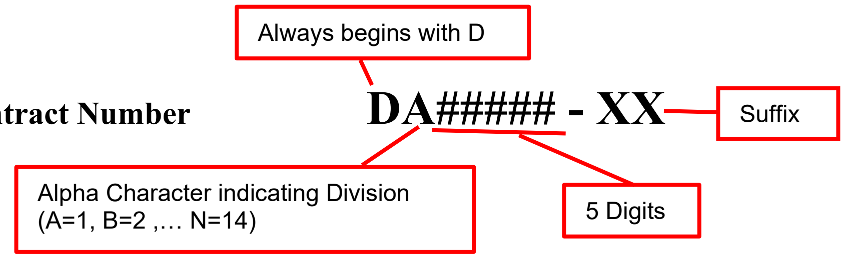
Appendix B Naming Conventions

Project Number Format

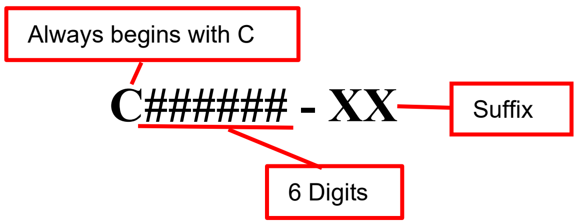
The estimator is responsible for setting up projects for each section of the proposal. The projects will have the following naming convention:

🗁**NOTE:** The contract number assigned in the **Letting Admin Dashboard** is used as the project number.

Division Contract Number



Central Contract Number

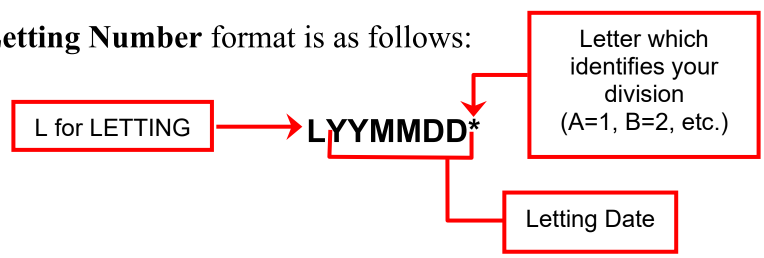


The **Suffix** identifies the section of the project:

ST	Structure projects
RW	Roadway projects

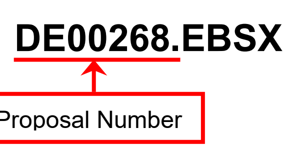
Letting Number Format

Letting Number format is as follows:



EBSX File Format

The file created by this process will have the following format:



Appendix C Division Identifiers

A	Division 1
B	Division 2
C	Division 3
D	Division 4
E	Division 5
F	Division 6
G	Division 7
H	Division 8
I	Division 9
J	Division 10
K	Division 11
L	Division 12
M	Division 13
N	Division 14
O	Bridge Management

Appendix D Default Workflow Phases

Projects	NCDOT Division Workflow	DLADM – Division Letting Admin
Proposals	NCDOT Division Workflow	DLADM – Division Letting Admin
Lettings	NCDOT Division Workflow	Process Bids

Appendix E Glossary

Alternate Line Items	Multiple line items specified in proposal items sheets that require the contractors to make a choice of materials.
Contractor	Any business entity who may receive proposals and plans for projects advertised by the contracts office.
Engineer's Estimate	A summary report showing estimated cost for each project in a letting.
Federal Aid Number	An identifier used by Federal Aid Administration to track federal funding associated with a specific project.
Force Account Items	Force account items represent costs of items in a project that will be performed by a third party, such as a railroad contractor of state forces on Federal Aid Projects. These items are not included in the contract and any associated costs are directly reimbursed to the third party by the state.
Generic Items	Non-standard items that provide flexibility in identifying an item selected by type of work and unit of measure.
Line Items	Pay items associated with a project.
Lump Sum Quantity Items	Pay items that have been classified as lump sum items for bidding in the master pay item list, but for which quantities estimators may specify quantities to assist in the cost estimation process.
Master Pay Item List	A listing of all standard pay items, specifying a description code for each item.
Non-Participating Agency	Any entity excluding NCDOT sharing in the total cost of a project.
Non-Participating Costs	Portion of line item cost assigned to a non-participating agency.

Continued on Following Page

Glossary

(continued)

Pay Item	A master pay item is a single, identifiable unit that includes all materials and services necessary to install that item. Synonymous with "contract item."
Division Project	The specific section of the highway together with all appurtenances and construction to be performed thereon under the contract.
Division Proposal	The form provided by the Department of Transportation on which the offer of the bidder to perform the work at designated bid prices is submitted.
Project	Represents costs associated with all or part of a construction project.
Proposal	The entities presented to potential contractors for bidding. You construct a proposal from projects. Typically, you combine multiple projects into a single proposal. Proposal information generally includes contract time specifications, DBE/WBE goals, bonding information, a detailed description of the work the contractor will perform, and an identification of any necessary special provisions, supplemental specifications, or both.
WBS Number	Identifier used by the fiscal section of the Department of Transportation to track funds.

Appendix F Supplemental Descriptions

Below is the format for entering supplemental descriptions. This is to be used as a consistency reference for entering supplemental descriptions.

PAY ITEM DESCRIPTION	SUPPLEMENTAL DESCRIPTION EXAMPLE
REINFORCED BRIDGE APPROACH FILL, STATION ************	(327+38.34)
**" PLAIN CONC PIPE CULVERTS	(15")
***MM PLAIN CONC PIPE CULVERTS	(350MM)
" RC PIPE CULVERTS, CLASS **	(15", IV)
****MM RC PIPE CULVERTS, CLASS ***	(350MM, IV)
**" X **" X **" RC PIPE TEES, CLASS III	(12" X 12" X 12")
*** X *** X ***MM RC PIPE TEES CLASS III	(350MM X 350MM X 350MM)
"X **"X **" CS PIPE TEES, ***" THICK	(12" X 12" X 12", 0.064")
*** X *** X ***MM CS PIPE TEES ****MM THICK	(350MM X 350MM X 350MM, 1.63MM)
MILLING ASPHALT PAVEMENT, ***"DEPTH	(1-1/2")
MILLING ASPHALT PAVEMENT, **MMDEPTH	(55MM)
MILLING ASPHALT PAVEMENT, ***"TO ******" DEPTH	(0" TO 1-1/2")
MILLING ASPHALT PAVEMENT, *** TO ***MM DEPTH	(0MM TO 55MM)
FRAME WITH GRATE, DETAIL 840.*****	(840.29)
FRAME WITH GRATE & HOOD, STD 840.03, TYPE **	(E)
**"X **" CONCRETE CURB	(8" X 12")
*** X ***MM CONCRETE CURB	(200MM X 450MM)
GENERIC PAVING ITEM	ULTRATHIN HOT MIX ASPHALT
GUARDRAIL ANCHOR UNITS, TYPE ************	(M-350)
OVERHEAD SIGN ASSEMBLY **	(A)
FOUNDATION CONDITIONING MATERIAL, UTILITIES CLASS ********	(III)
" DI WATER PIPE, CLASS **********	(12", IV)
"X"X**" PERFORATED CS PIPETEE RISER, 0.064"THICK	(18" X 18" X 18")
XX***MM PERFORATED CS PIPE TEE RISER, 1.63MM THICK	(450MM X 450MM X 450MM)
PEDESTRIAN SIGNAL HEAD (**", ** SECTION)	(12", 3)

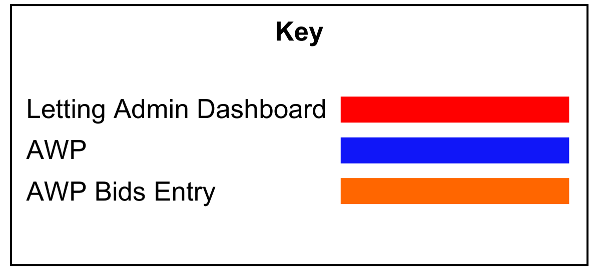
Continued on Following Page

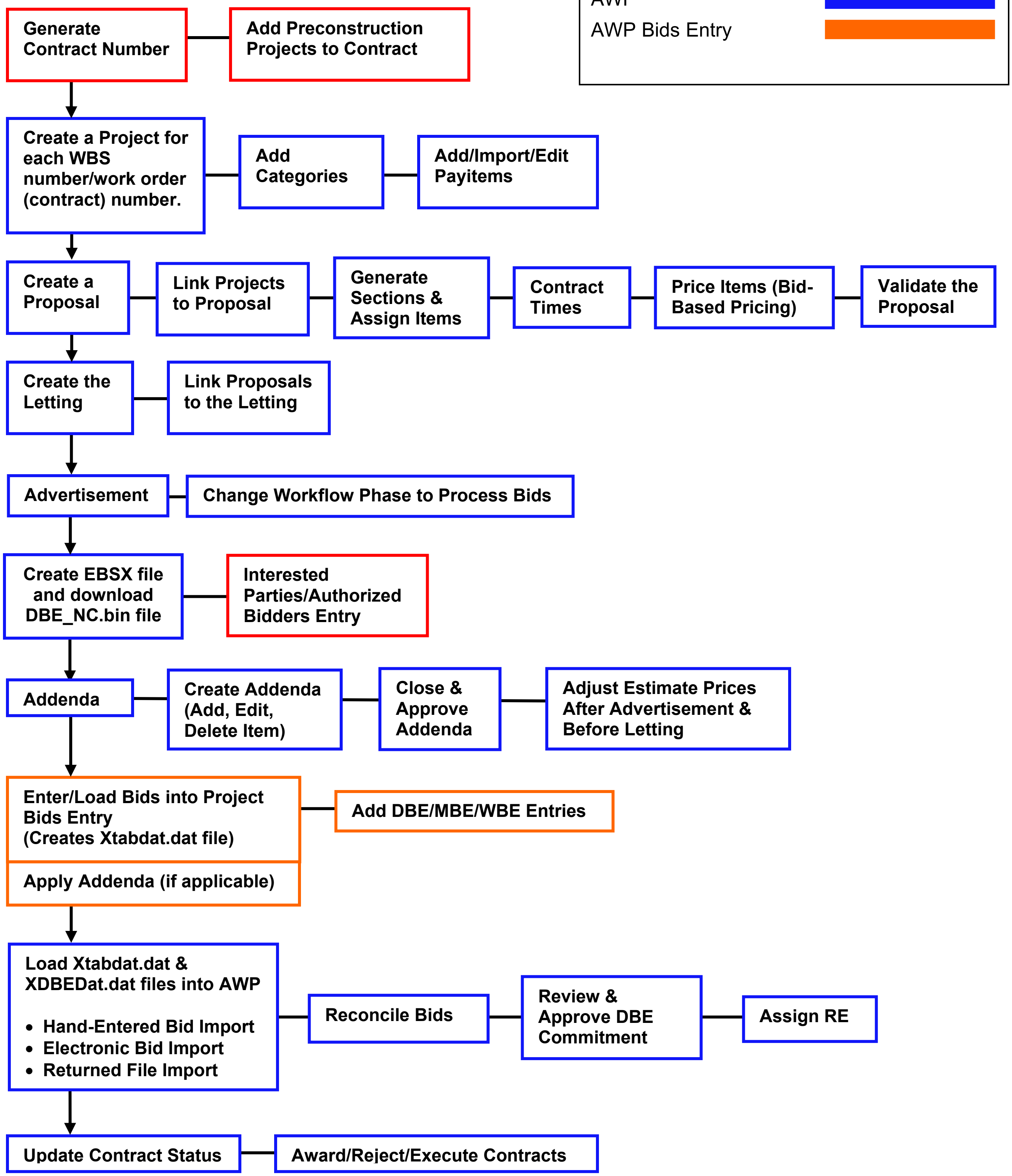
Supplemental Descriptions

(continued)

PEDESTRIAN SIGNAL HEAD (***MM,** SECTION)	(450MM, 3)
PREFORMED INDUCTIVE LOOP (**'X**') WITH *'TAIL SECTION	(6' X 30', 5')
PREFORMED LOOP (***M X ***M) WITH ***M TAIL SECTION	(15M X 7.5M, 12M)
COMMUNICATIONS CABLE (**FIBER)	(3)
REMOVAL OF EXISTING STRUCTURE AT STATION ************	(27+38.234-L-)
FOUNDATION EXCAVATION FOR END BENT ** AT STATION ***********	(2, 27+38.234-L-)

Appendix G Flow Chart



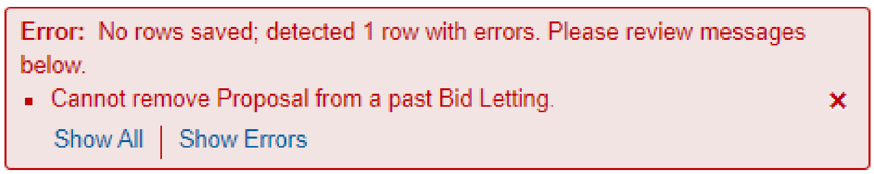


Appendix H Re-Letting a Proposal

If a Proposal is No bids Received, Rejected, or Rescinded, you will be able to re-let it by following this procedure.

Step	Action
1	Unlink the Proposal from the Letting. See **Unlinking a Proposal From a Letting** on **Page 5-8**.

If the Letting Date has passed, you will receive the following error:



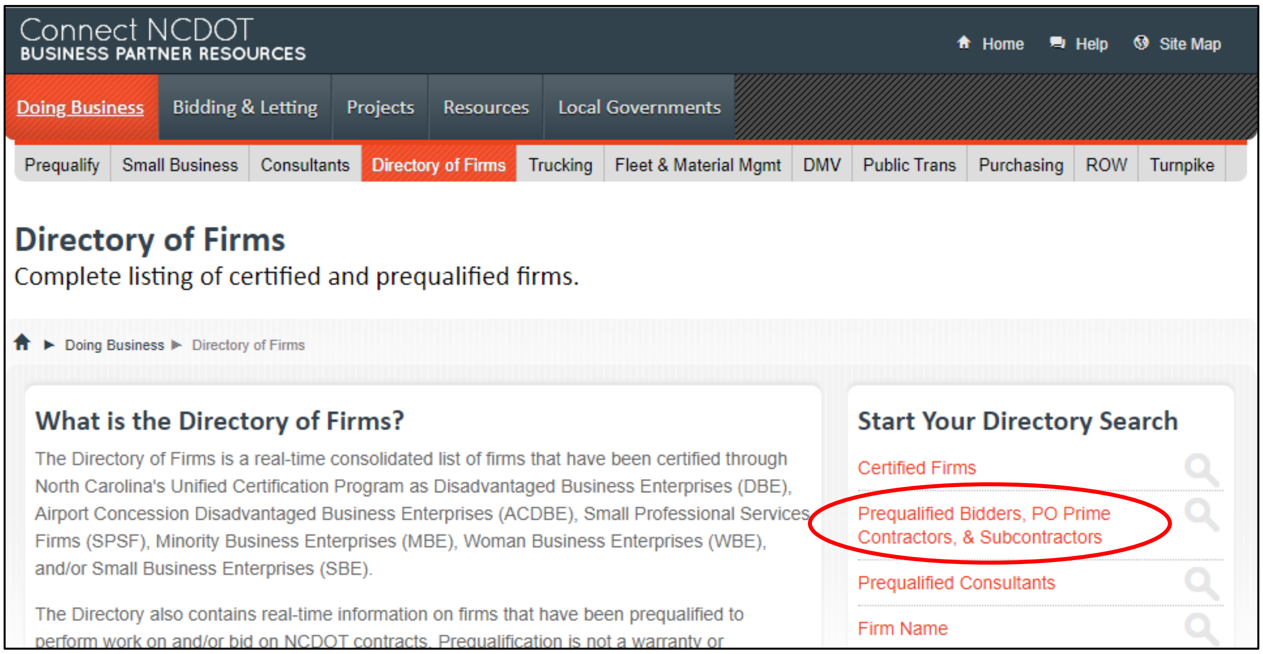
🗁**NOTE:** If this happens, contact awphelp@ncdot.gov to unlink.

2	Remove the Projects from the Proposal. See **Removing a Project from a Proposal** on **Page 4-30**.
3	Copy the Proposal. See **Copying A Proposal** on **Page 4-26**.
4	Re-link the Projects. 🗁**NOTE:** If any of your Projects have Addenda, the Addenda will not get copied, Instead the changes will merge. See **Linking Projects to a Proposal** on **Page 4-10**.
5	Delete old Proposal number. See **Deleting a Proposal** on **Page 4-36**.
6	When a new Letting becomes available, link to it. See **Linking Proposals to the Letting** on **Page 5-4**.

Appendix I Parsing the Directory of Firms

At times a Project will not receive any bidders, so you may want to send an email blast to all eligible Contractors in order to call attention to the Project and its consequent Let Date.

Step	Action	Result
1	In the address bar of your web browser, type [HTTPS://WWW.EBS.NC.GOV/VENDORDIRECTORY/DEFAULT.HTML](https://www.ebs.nc.gov/VendorDirectory/default.html) and press Enter.	The **Directory of Firms Overview** page will appear.

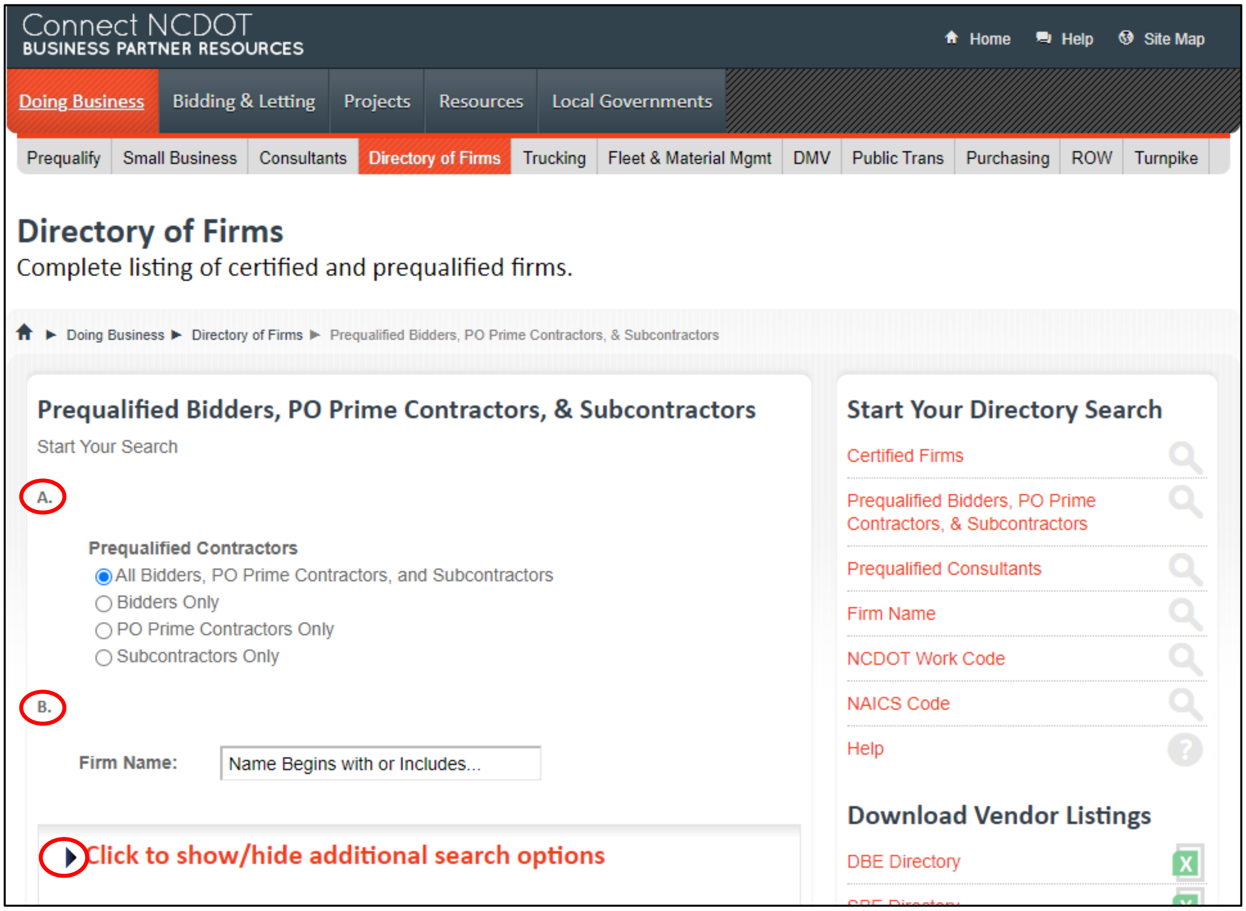


Step	Action	Result
2	On the right side of the page, click **PREQUALIFIED BIDDERS, PO PRIME CONTRACTORS, & SUBCONTRACTORS**.	The following page will appear.

Continued on Following Page

Parsing the Directory of Firms

(continued)



For **A**, ***All Bidders, PO Prime Contractors, and Subcontractors*** will be selected.

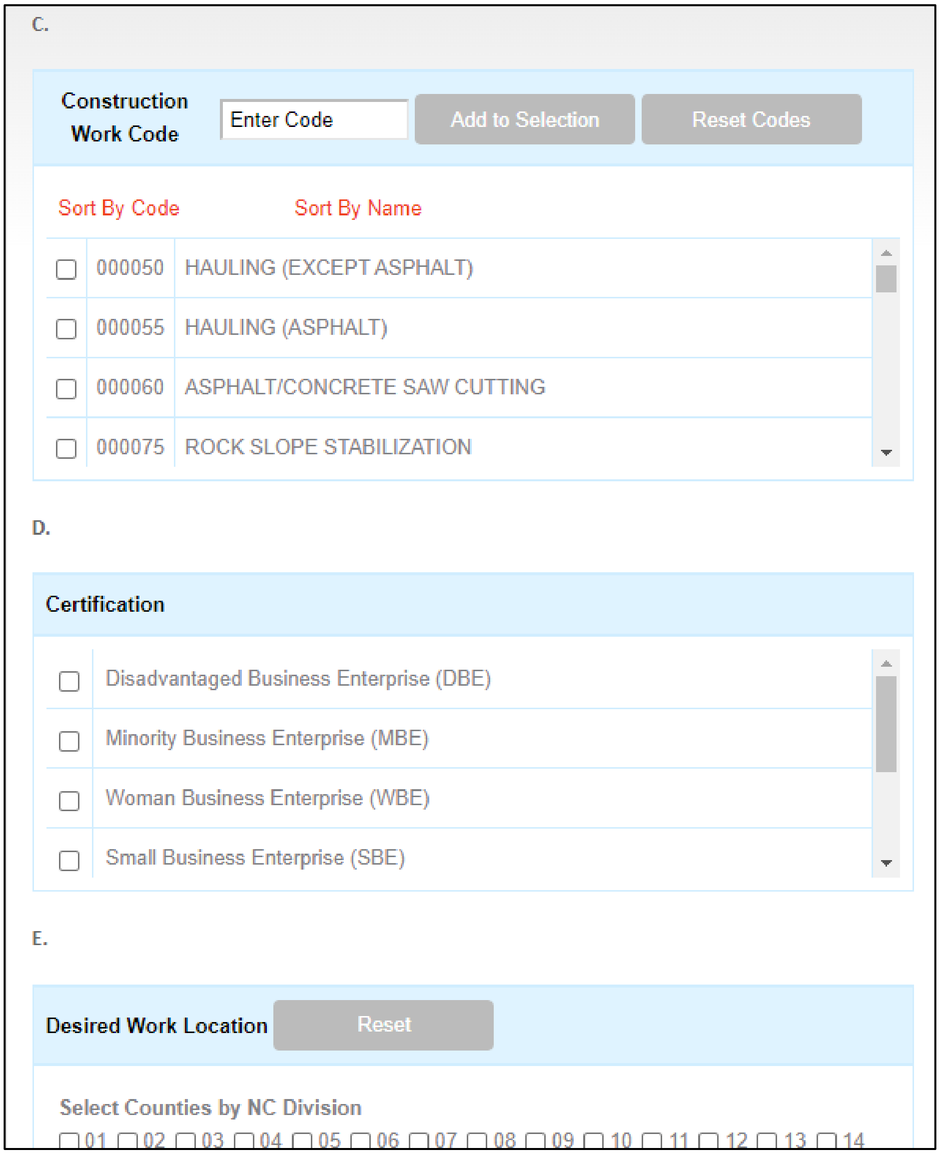
Leave **B** blank.

3	Click the arrow to show additional search options.	Additional search options will appear.

Continued on Following Page

Parsing the Directory of Firms

(continued)

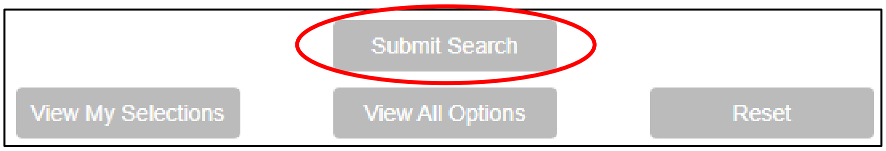


4	You will be able to parse the list by: C Construction Work Code D Certification E Desired Work Location F Address Location	

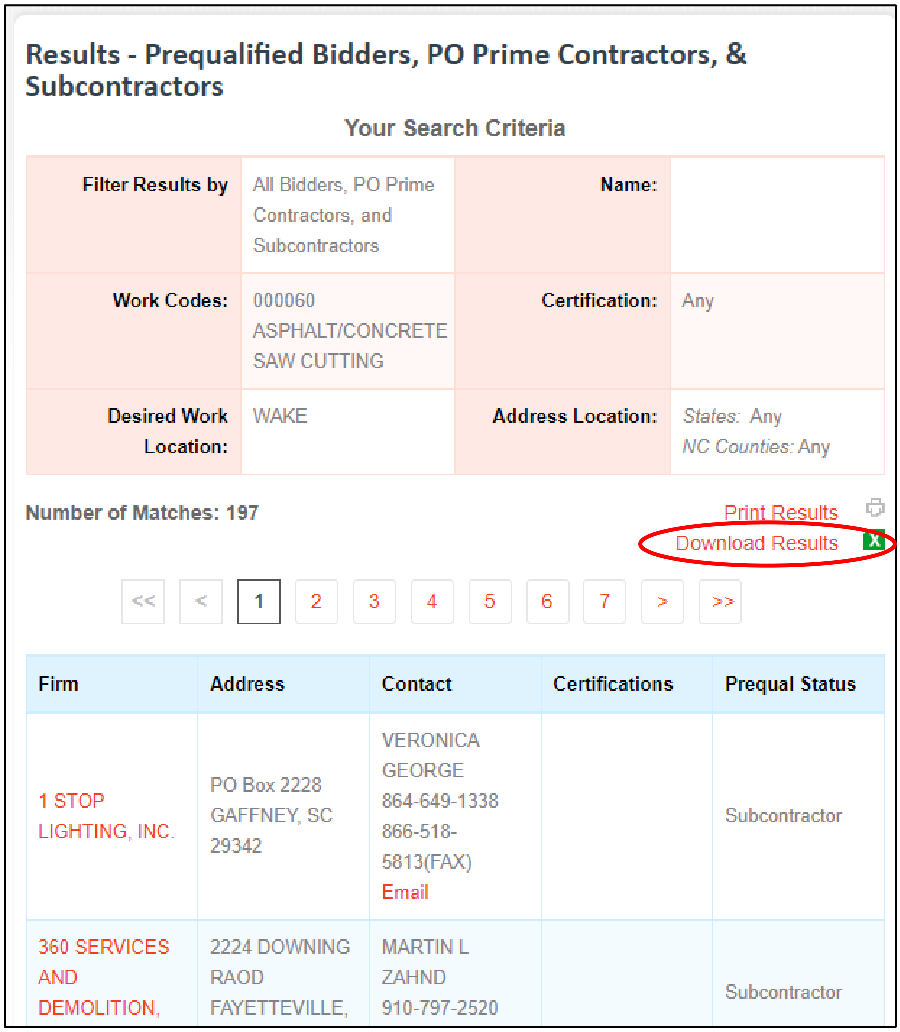
Continued on Following Page

Parsing the Directory of Firms

(continued)



5	At the bottom of the page are the following buttons, click the **SUBMIT SEARCH** button.	The filters you chose will appear at the top of the page and the parsed list will display underneath.

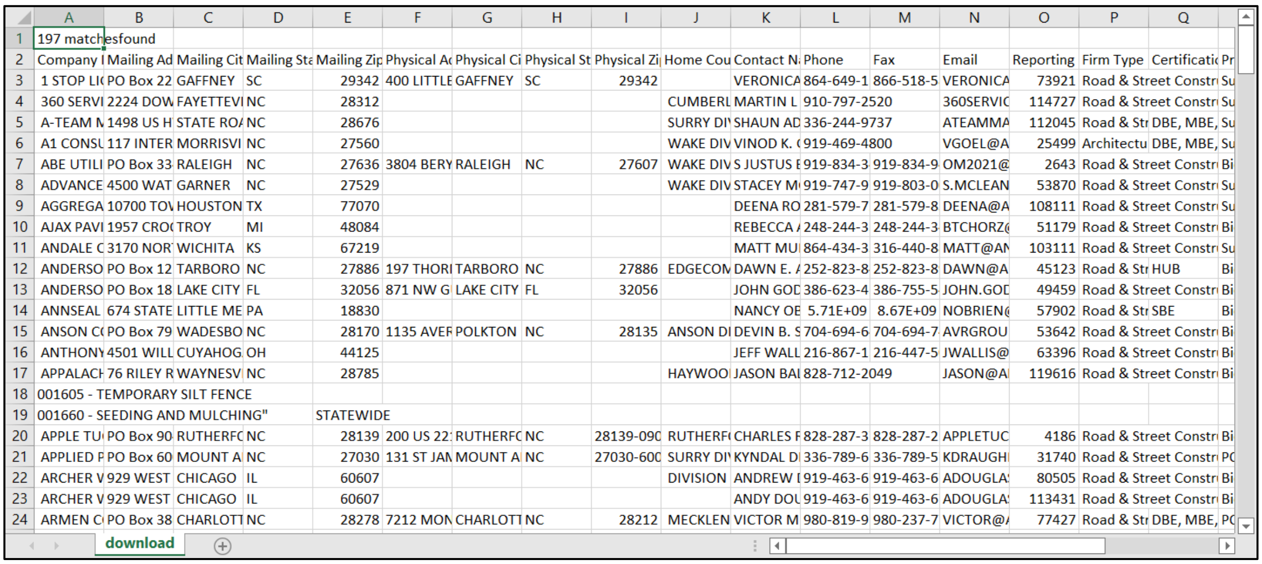


Continued on Following Page

Parsing the Directory of Firms

(continued)

6	Click the **DOWNLOAD RESULTS** link.	A file named download.csv will download to your downloads folder. This file is the list you just produced. You will be able to open it in Excel.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
1	197 matchesfound																	
2	Company I	Mailing Ad	Mailing Cit	Mailing Sta	Mailing Zip	Physical Ad	Physical Ci	Physical St	Physical Zi	Home Cou	Contact Na	Phone	Fax	Email	Reporting	Firm Type	Certificati	Pr
3	1 STOP LI	PO Box 22	GAFFNEY	SC	29342	400 LITTLE	GAFFNEY	SC	29342		VERONICA	864-649-1	866-518-5	VERONICA	73921	Road & Street Constr		Su
4	360 SERVI	2224 DOW	FAYETTEVI	NC	28312					CUMBERL	MARTIN L	910-797-2520		360SERVIC	114727	Road & Street Constr		Su
5	A-TEAM M	1498 US H	STATE ROA	NC	28676					SURRY DI	SHAUN AD	336-244-9737		ATEAMMA	112045	Road & Str	DBE, MBE,	Su
6	A1 CONSU	117 INTER	MORRISVI	NC	27560					WAKE DIV	VINOD K. (	919-469-4800		VGOEL@A	25499	Architectu	DBE, MBE,	Su
7	ABE UTILI	PO Box 33	RALEIGH	NC	27636	3804 BERY	RALEIGH	NC	27607	WAKE DIV	S JUSTUS E	919-834-3	919-834-9	OM2021@	2643	Road & Street Constr		Bi
8	ADVANCE	4500 WAT	GARNER	NC	27529					WAKE DIV	STACEY M	919-747-9	919-803-0	S.MCLEAN	53870	Road & Street Constr		Su
9	AGGREGA	10700 TOV	HOUSTON	TX	77070						DEENA RO	281-579-7	281-579-8	DEENA@A	108111	Road & Street Constr		Su
10	AJAX PAVI	1957 CRO(	TROY	MI	48084						REBECCA /	248-244-3	248-244-3	BTCHORZ(	51179	Road & Street Constr		Bi
11	ANDALE C	3170 NOR	WICHITA	KS	67219						MATT MU	864-434-3	316-440-8	MATT@AN	103111	Road & Street Constr		Su
12	ANDERSO	PO Box 12	TARBORO	NC	27886	197 THORI	TARBORO	NC	27886	EDGECOM	DAWN E. /	252-823-8	252-823-8	DAWN@A	45123	Road & Str	HUB	Bi
13	ANDERSO	PO Box 18	LAKE CITY	FL	32056	871 NW G	LAKE CITY	FL	32056		JOHN GOD	386-623-4	386-755-5	JOHN.GOD	49459	Road & Street Constr		Bi
14	ANNSEAL	674 STATE	LITTLE ME	PA	18830						NANCY OE	5.71E+09	8.67E+09	NOBRIEN(	57902	Road & Str	SBE	Bi
15	ANSON C(	PO Box 79	WADESBO	NC	28170	1135 AVER	POLKTON	NC	28135	ANSON DI	DEVIN B. S	704-694-6	704-694-7	AVRGROU	53642	Road & Street Constr		Bi
16	ANTHONY	4501 WILL	CUYAHOG	OH	44125						JEFF WALL	216-867-1	216-447-5	JWALLIS@	63396	Road & Street Constr		Bi
17	APPALACH	76 RILEY R	WAYNESV	NC	28785					HAYWOO	JASON BAI	828-712-2049		JASON@AI	119616	Road & Street Constr		Bi
18	001605 - TEMPORARY SILT FENCE																	
19	001660 - SEEDING AND MULCHING"				STATEWIDE													
20	APPLE TU(	PO Box 90	RUTHERFC	NC	28139	200 US 22	RUTHERFC	NC	28139-090	RUTHERF(	CHARLES F	828-287-3	828-287-2	APPLETUC	4186	Road & Street Constr		Bi
21	APPLIED F	PO Box 60	MOUNT A	NC	27030	131 ST JAN	MOUNT A	NC	27030-600	SURRY DI	KYNDAL D	336-789-6	336-789-5	KDRAUGH	31740	Road & Street Constr		PC
22	ARCHER V	929 WEST	CHICAGO	IL	60607					DIVISION	ANDREW I	919-463-6	919-463-6	ADOUGLA	80505	Road & Street Constr		Bi
23	ARCHER V	929 WEST	CHICAGO	IL	60607						ANDY DOU	919-463-6	919-463-6	ADOUGLA	113431	Road & Street Constr		Bi
24	ARMEN C(	PO Box 38	CHARLOTT	NC	28278	7212 MON	CHARLOTT	NC	28212	MECKLEN	VICTOR M	980-819-9	980-237-7	VICTOR@/	77427	Road & Str	DBE, MBE,	PC

download

You will be able to sort and filter the data (remove subcontractors who can't bid) in the Excel file to get the list(s) you need.