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Aurigo Software Technologies Inc.

Quick Start Guide – e-Bidding

Aurigo® Software Technologies, Inc.

www.aurigo.com

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1 e-Bidding

In Masterworks, the e-Bidding module ensures a highly confidential bidding process. Bidders will log on to Masterworks, using the registered **User Name** and **Password** to view the advertisements, acknowledge addenda (if any), and respond to the advertised bids. In the e-Bidding module, the **Contractor Bidding List** page displays the list of advertised bids. The Bidders can submit bid response within 24 hours prior to the bid opening date and time.

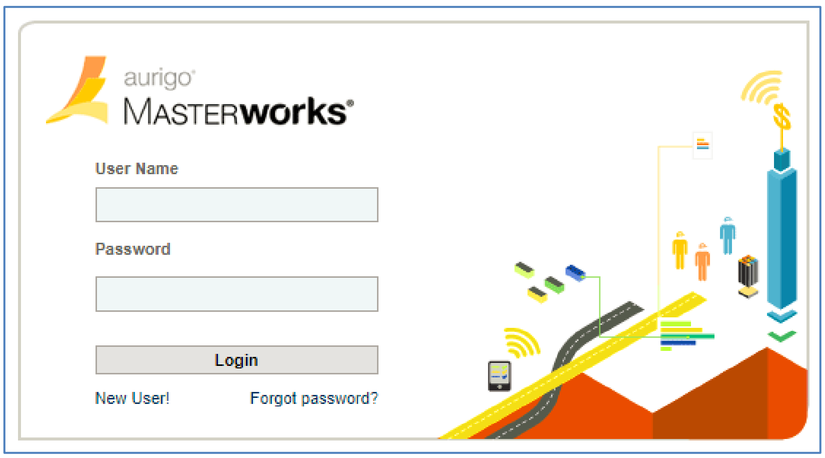
The bid details page consists of the following tabs:

- Bid Information
- Bid Items
- Bidder Information
- Checklist
- DBE Commitment (for federal funded projects only).

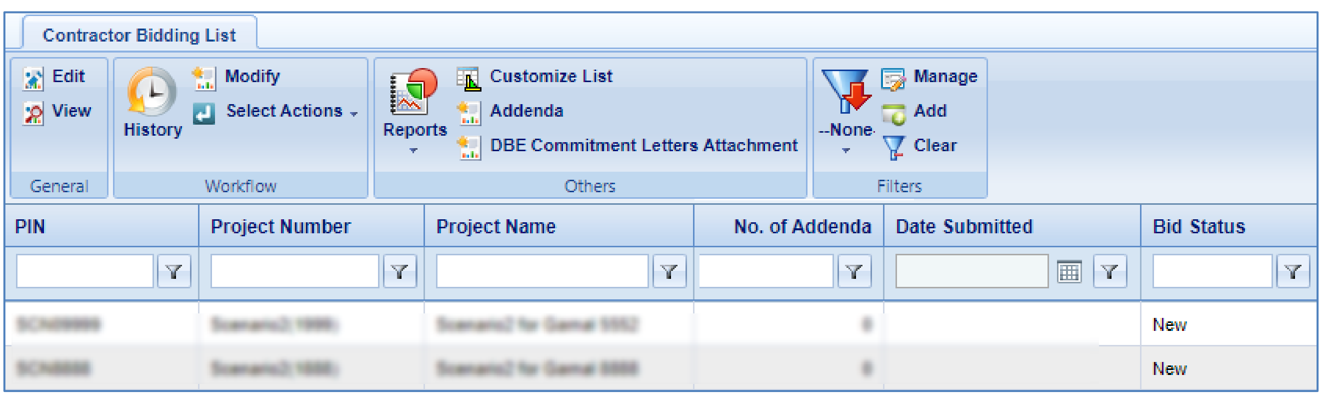
1.1 Submitting Contractor Bidding Details

Steps

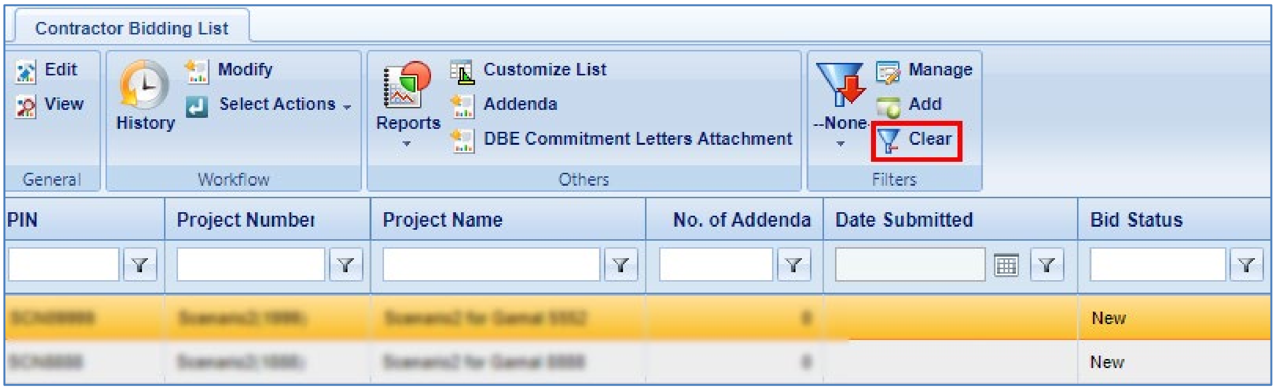
1. Log on to Masterworks with your **User Name** and **Password**.



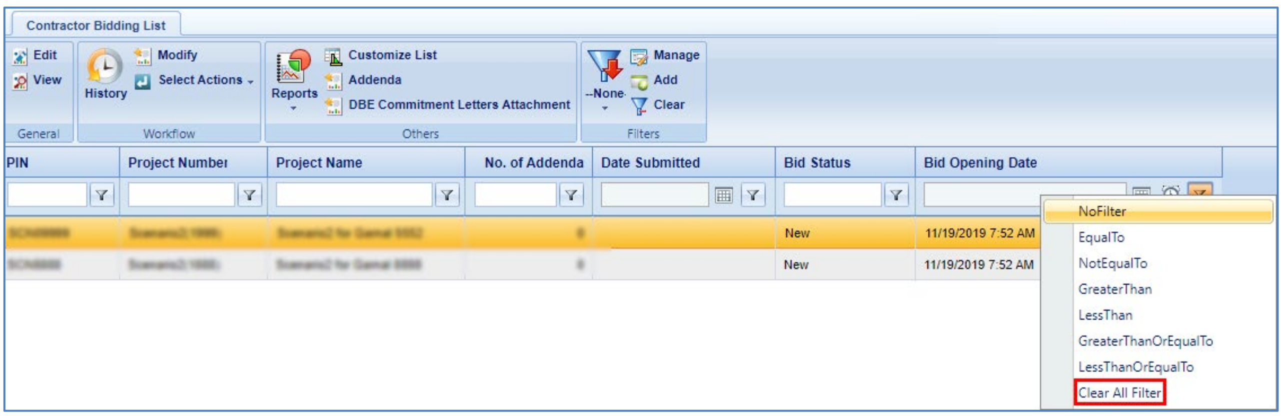
The **Contractor Bidding List** page is displayed. By default, the list of advertised bids for which the **Bid Opening Date and Time** is not elapsed is displayed.



2. To view the bids for which the **Bid Opening Date and Time** has elapsed, on the toolbar, in the **Filters** group, click **Clear**.



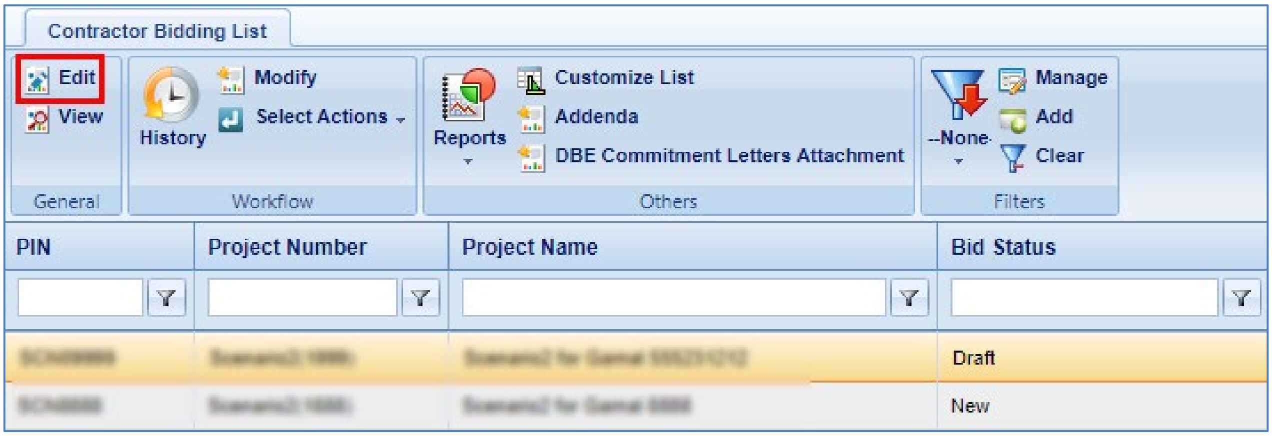
Alternatively, to view the bids in inactive and closed status, in the **Bid Opening Date** column click  and then click **Clear All Filter**.



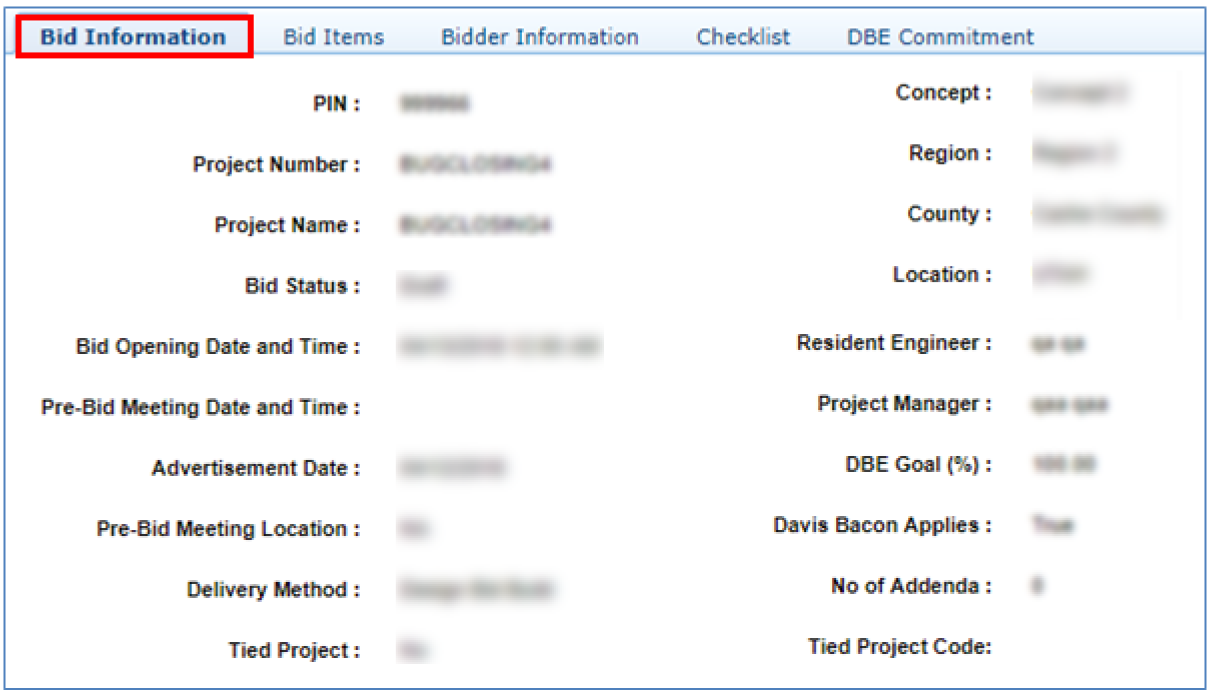
3. To respond to an advertised bid, perform the following steps:
   a. Select the bid in the bid status **New** and on the toolbar, in the **Workflow** group, click **Select Actions**.
   b. Click **Move To Review.**
   c. Click **OK**. The **Bid Status** is set to **In Review**.
   Alternatively, double–click the bid in the bid status **New**. The **Bid Information** tab is displayed. The **Bid Status** is set to **In Review**.
   d. Select the bid in the bid status **In Review** and on the toolbar, in the **Workflow** group, click **Select Actions**.

   e. Click **Move To Draft.**
   f. Click **OK**. The **Bid Status** is set to **Draft**.

4. Select the bid in the bid status **Draft** and on the toolbar, in the **General** group, click **Edit**.

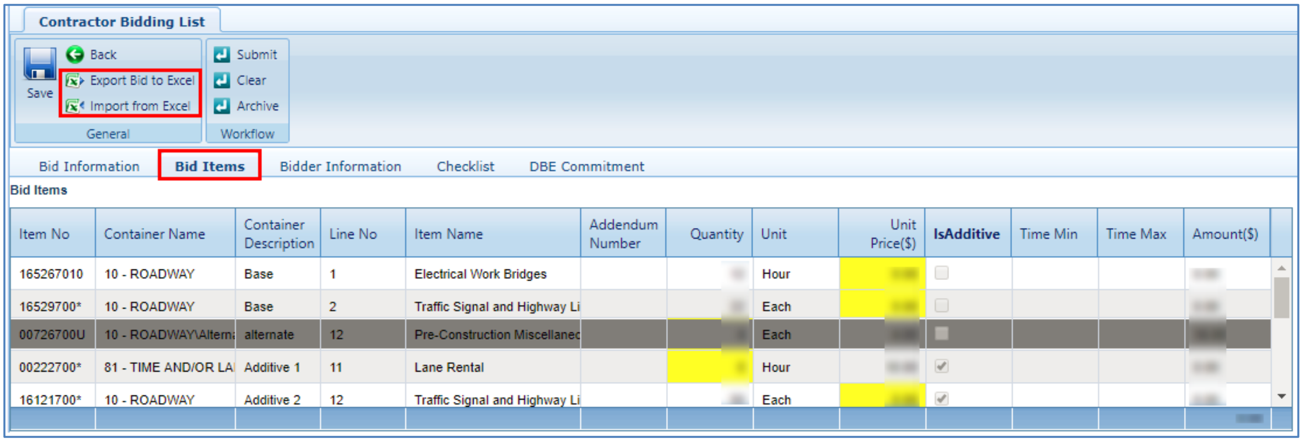


The **Bid Information** tab is displayed. The **Bid Information** tab displays the project information and the advertisement details.



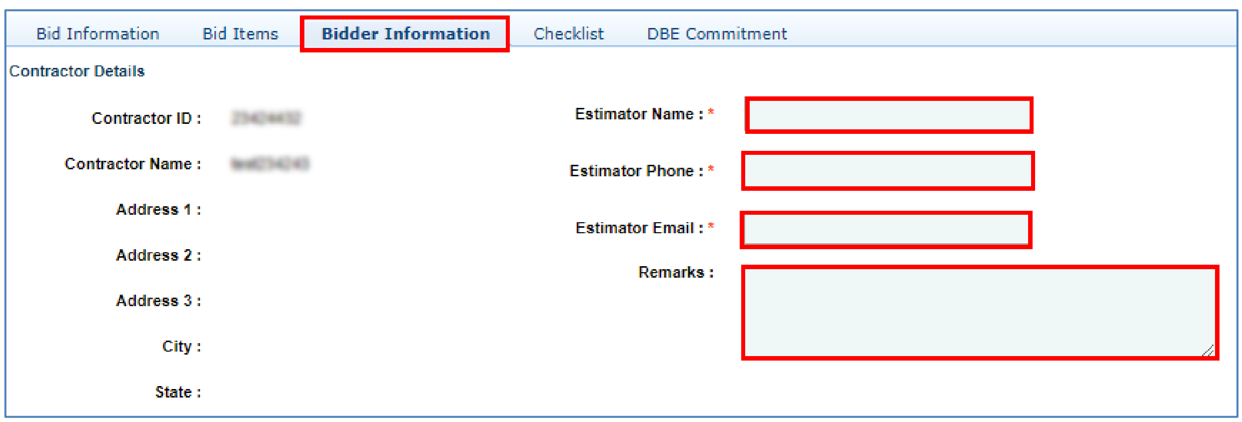
5. Click the **Bid Items** tab. The **Bid Items** tab displays the details of the bid items that are advertised. The editable cells are highlighted in yellow.

6. Corresponding to the bid items, click the cells that are highlighted in yellow for each bid item and enter the values. In the rows that are highlighted in grey, the **Quantity** and **Unit Price($)** are non-editable. The total amount of the bid items is displayed in the bottom right corner of the table.



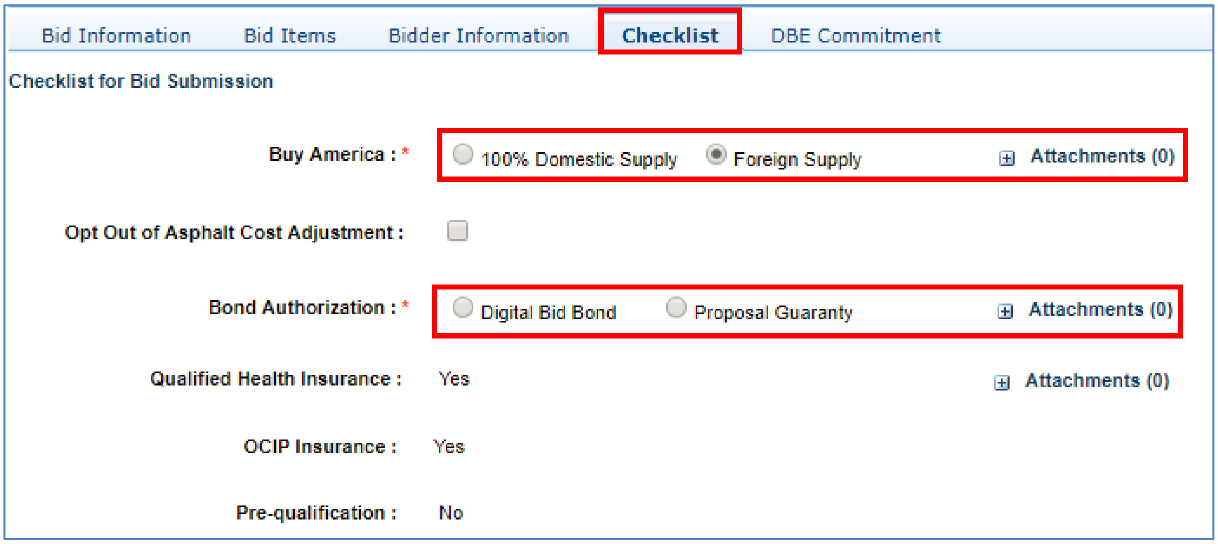
***Note:** You can export the bid items list page as a template to a Microsoft Excel workbook using the **Export Bid to Excel** option. The fields of the bid items form the columns of the Excel template workbook. You can enter values in the cells that are highlighted in yellow and import the updated Excel template workbook to Masterworks using the **Import from Excel** option.*

7. Click the **Bidder Information** tab. The **Bidder Information** tab displays the details of the bidder.



8. Enter the information as described below.
   - **Estimator Name** – Enter the name of the person estimating the bid items.
   - **Estimator Phone** – Enter the contact number of the person estimating the bid items.
   - **Estimator Email** – Enter the email address of the person estimating the bid items.
   - **Remarks** – Enter the remarks, if any.

9. Click the **Checklist** tab. The **Checklist** tab displays the details for the bid submission.



10. Provide the required information in the fields, as described in the following table:

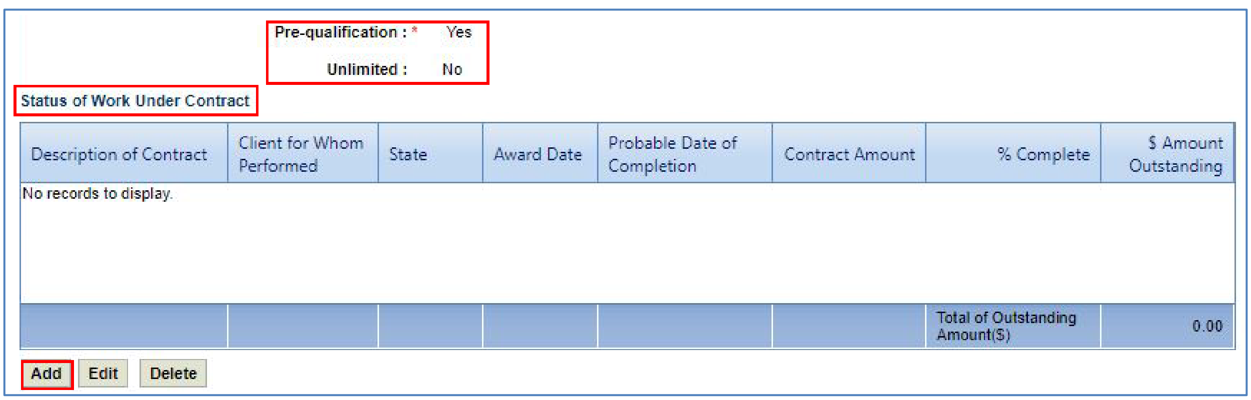
Field	Description
Buy America	1. From the options, click the appropriate supply for the bid items. 2. To attach a document relevant to the selected option, expand **Attachments** and attach only .pdf files. For information on file attachments, refer *Attachments*.
Opt Out of Asphalt Cost Adjustment	Select the **Opt Out of Asphalt Cost Adjustment** check box, to opt out of asphalt cost adjustment.
Bond Authorization	1. From the options, click the appropriate method for bond authorization. You can select the **Digital Bid Bond** option or the **Proposal Guaranty** option. ○ If **Digital Bid Bond** is selected, the **Bond Authorization Code** field is displayed. Enter the Bond Authorization Code. ○ If **Proposal Guaranty** is selected, the Proposal Guaranty Check and Check # fields are displayed. a. From the **Proposal Guaranty Check** drop-down box, select either **Certified Check** or **Cashier's Check**. b. In the **Check #** box, enter the check number. 2. To attach a document relevant to the selected option, expand **Attachments** and attach only .pdf files. For information on file attachments, refer *Attachments*.

The following fields are displayed in the Checklist tab:

Field	Description
Qualified Health Insurance	If the Qualified Health Insurance is applied, **Yes** is displayed. Optionally, expand **Attachments** and attach only .pdf files relevant to Qualified Health Insurance. For information on file attachments, refer *Attachments*.
OCIP Insurance	If the OCIP Insurance is applied, **Yes** is displayed.
Pre-Qualification	If the advertised value of the construction project exceeds $3 million and pre-qualification of contractor is required, **Yes** is displayed. **No** indicates that the pre-qualification of contractor is not required. ***Note**: Pre-Qualification of contractors is required for construction projects that have an advertised value exceeding $3 million.*
Unlimited	If the contractor is pre-qualified for an unlimited amount of work by UDOT, **Yes** is displayed.
***Note**: If the Pre-Qualification is **Yes** and Unlimited is **No**, the **Status of Work Under Contract** section appears.*	

11. In the **Status of Work Under Contract** section, perform the following steps:

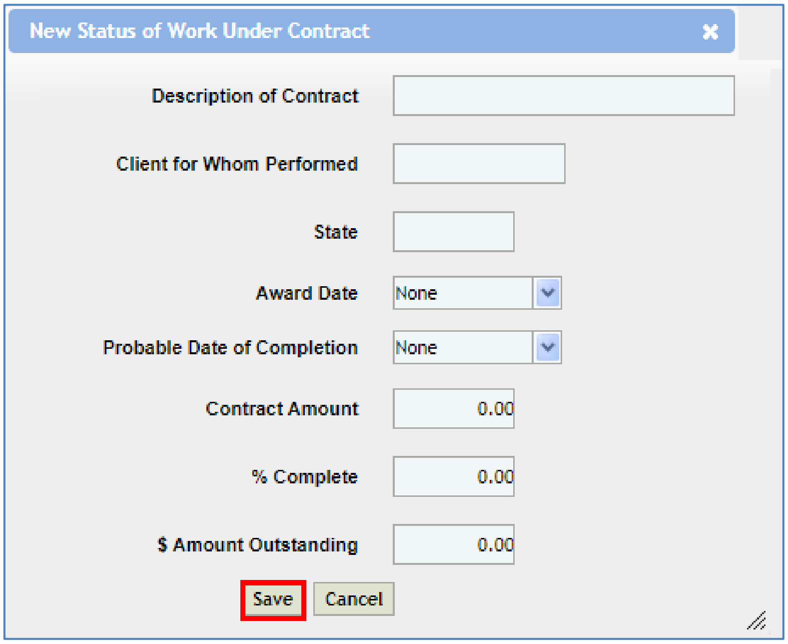
a. To add the new status of work, click **Add**.
The **New Status of Work Under Contract** dialog box is displayed.



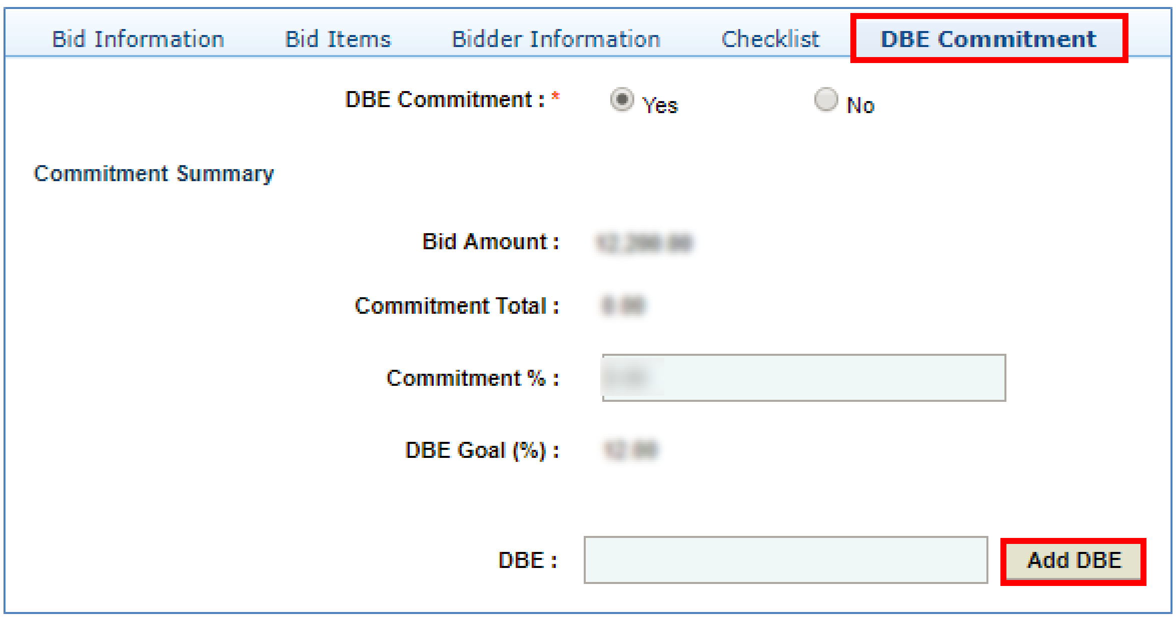
b. In the **New Status of Work Under Contract** dialog box, enter the information as described below.

- **Description of Contract** – Enter the description of the contract.
- **Client for Whom Performed** – Enter the name of the client for whom the work is performed.
- **State** – Enter the name of the State where the work is performed.
- **Award Date** – From the drop-down calendar, select the award date.
- **Probable Date of Completion** – From the drop-down calendar, select the probable date of completion of work.
- **Contract Amount** – Enter the contract amount.
- **% Complete** – Enter the completion percentage.
- **$ Amount Outstanding** – Enter the outstanding amount in $.

c. Click **Save.** The details are saved in the **Status of Work Under Contract** section.



12. For a federal funded project, click the **DBE Commitment** tab. The DBE commitment details are displayed.

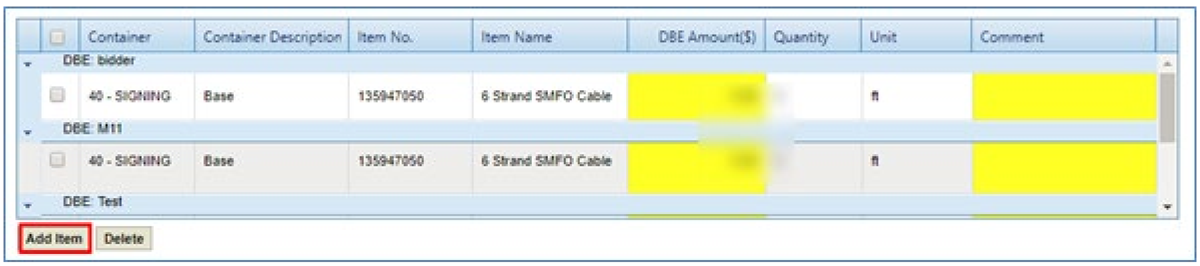


13. In the **DBE Commitment** box, by default the DBE Commitment is selected **Yes**. If the DBE commitment is not applicable, click **No**.

__Note__: If there is no DBE commitment, the __Good Faith Effort__ is automatically changed to __Yes__.

14. In the **Commitment Summary** section, to add the DBE:
    a. Click **Add DBE**.
    The **Contractors** dialog box is displayed.
    b. Select the DBE and click **Select**.
    DBE is added to the Commitment Summary.
    c. To add items to the DBE, click **Add Item**. The **Items** dialog box is displayed.

    d. Select the items and click **Select**. The items are added to the list.
    e. Repeat steps **c** to **d** to add more DBE items.
    f. Corresponding to each item, click the cells that are highlighted in yellow and enter the values. Based on the DBE amount, the **Commitment Total** and **Commitment %** is updated.



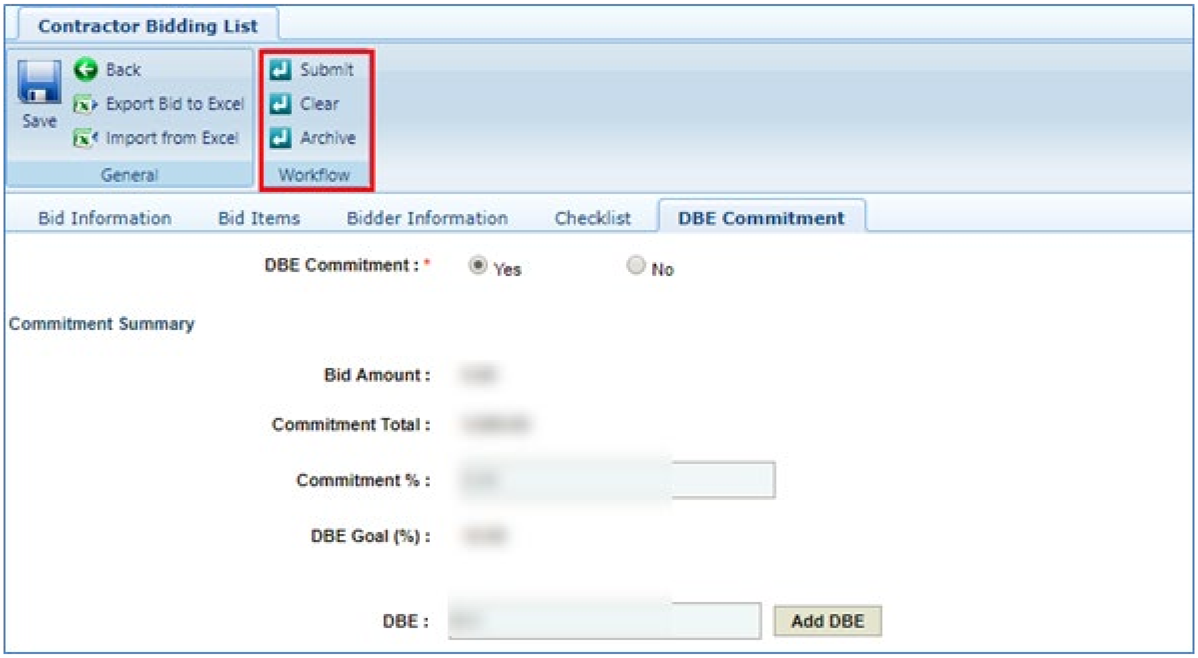
    ***Note**: If the Commitment % is less than the DBE Goal (%), the **Good Faith Effort** is automatically changed to **Yes**.*

    g. To add more DBE's in the Commitment Summary section, repeat steps **a** to **f**.

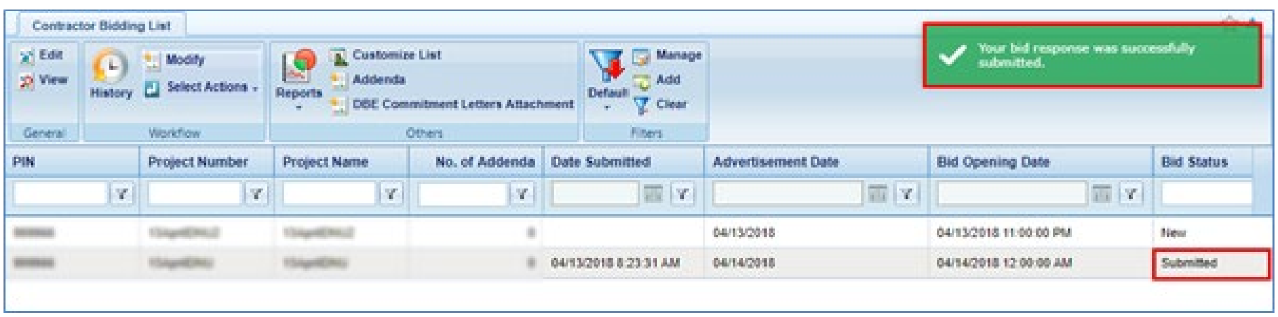
15. If the **Good Faith Effort** is **Yes**, expand **Attachments** and attach only .pdf files relevant to the Good Faith Effort. For information on file attachments, refer *Attachments*.
16. Optionally, expand **Attachments** and attach only .pdf files relevant to the bid.
    For information on file attachments, refer *Attachments*.
17. To save the bid response details, click **Save**.
18. To erase the information saved in the bid, click **Clear**.

19. On the toolbar, in the **Workflow** group, click **Submit** and then click **OK**.

    ***Note**: Do not click **Archive**. This action is initiated by the application.*



The **Bid Status** of the bid is set to **Submitted**.

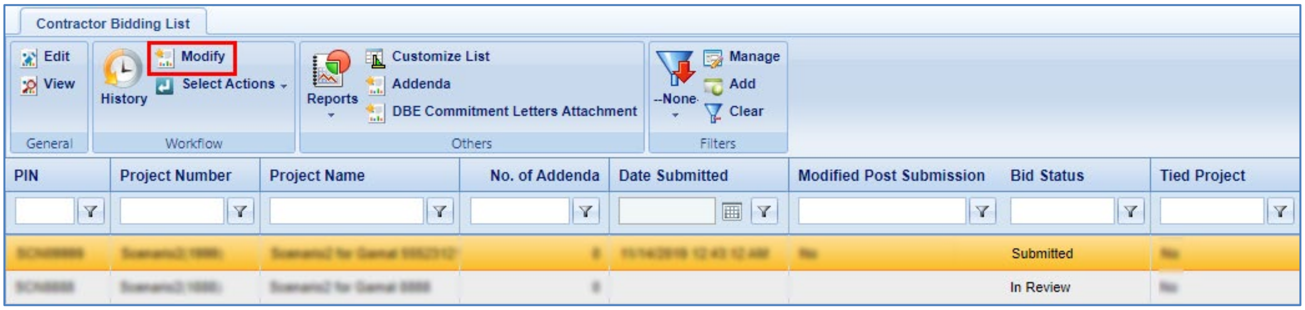


1.2 Modifying Contractor Bidding Details

You can update the bid related information for the bids that are submitted, without impacting the workflow status of the record.

Steps

1. Select the bid in the bid status **Submitted** and, on the toolbar, in the **Workflow** group, click **Modify**.



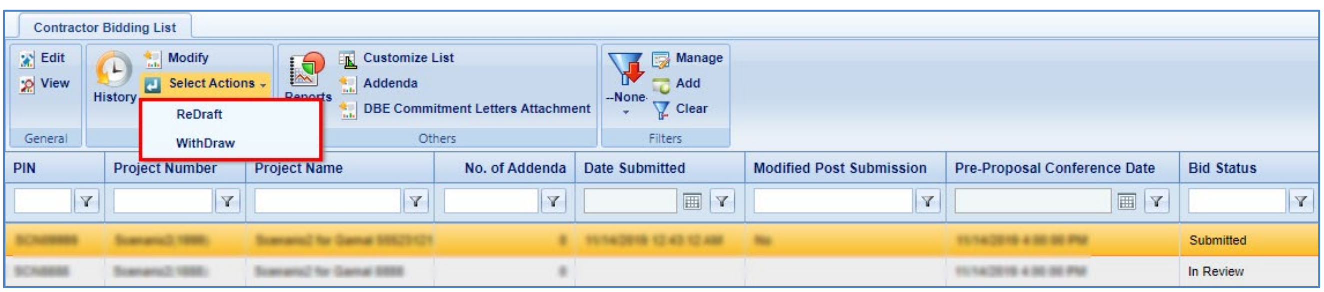
2. Update the information in the required fields, refer [Submitting Contractor Bidding Details](#).
3. Click **Save**. The bid details are updated.

   Note: *On modifying the bid details, a confirmation message to indicate the bid details are updated successfully.*

1.3 Withdrawing or Redrafting the Contractor Bidding Details

Steps

1. To withdraw or redraft the bid details, refer to the following steps:



   a. In the **Contractor Bidding List** page, select the bid in the bid status **Submitted.**

   b. On the toolbar, in the **Workflow** group, click **Select Actions**.

   c. Click **WithDraw** to cancel the bid response and then click **OK**. The **Bid Status** of the bid is set to **Withdrawn.**

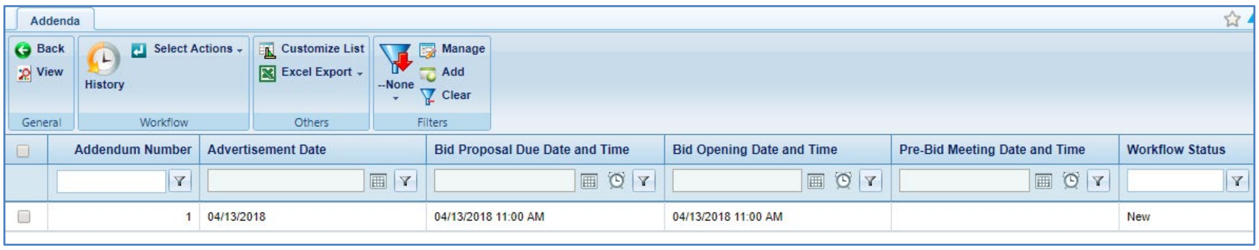
   d. Alternatively, click **ReDraft** to update the existing information in the submitted bid. The **Bid Status** of the bid is set to **Draft.**

1.4 e-Bidding for Addendum

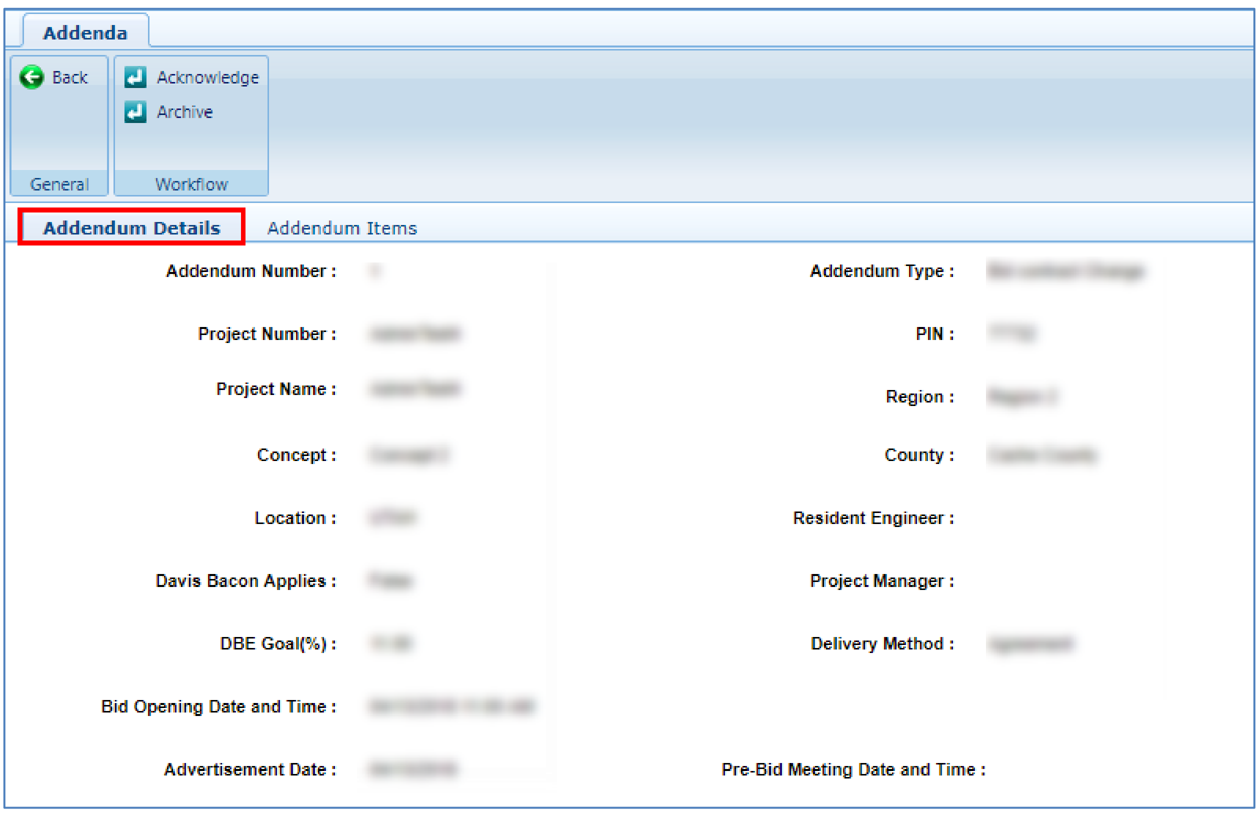
In the **e-Bidding** module, bidders can also view the change in advertisement through an Addendum. The Addendum list page displays the key details such as Addendum Number, Addendum Type, and the information related to the change. To submit the bid response, the bidder must acknowledge the Addendum.

Steps

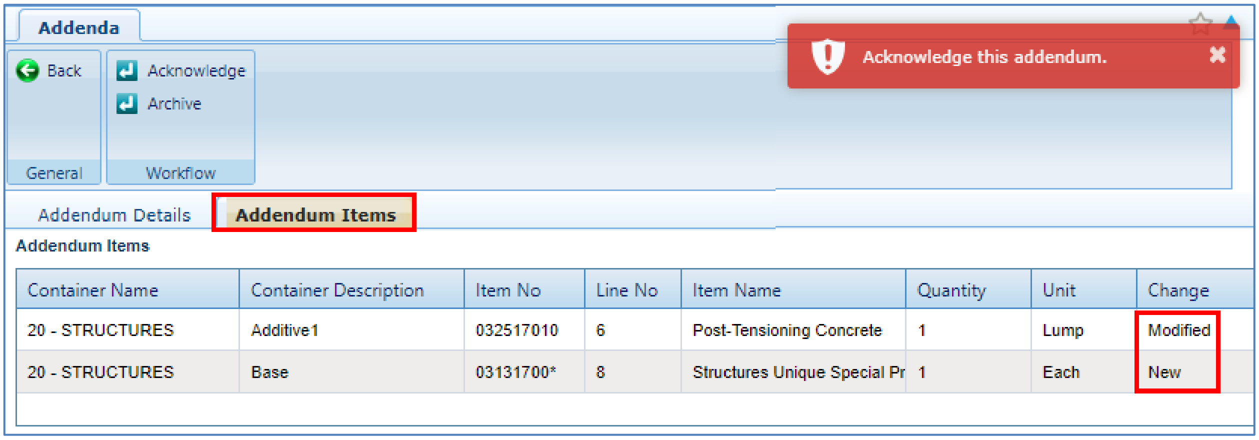
1. From the **Contractor Bidding List** page, select the required bid.
2. On the toolbar, in the **Others** group, click **Addenda**.
   The **Addenda** list page is displayed.



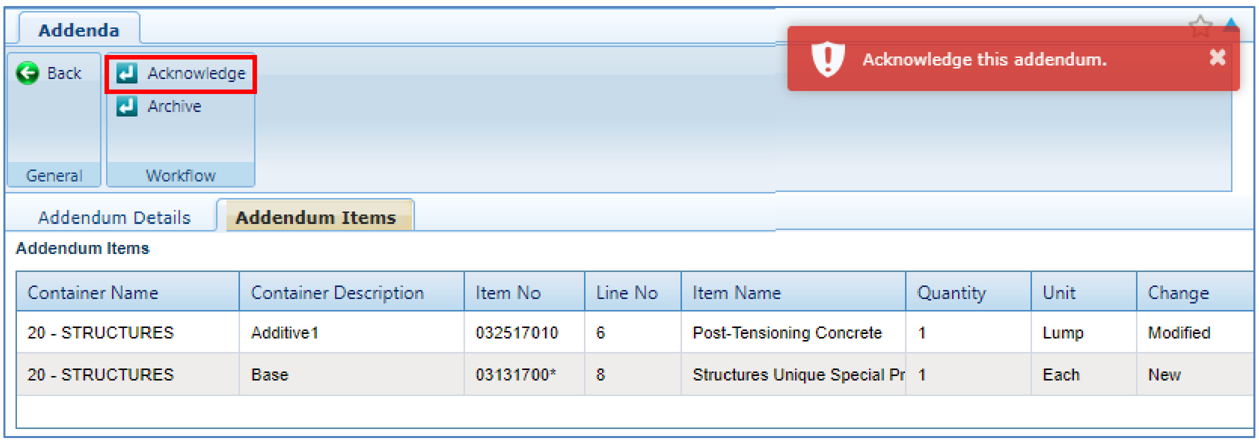
3. Select the addendum to view.
   The **Addendum Details** tab displays the recent changes in advertisement details.



The **Addendum Items** tab displays the recent changes in advertisement items.



4. In the **Workflow** group, click **Select Actions** and select **Acknowledge**.
   The workflow status of the Addendum is changed to **Acknowledged**.

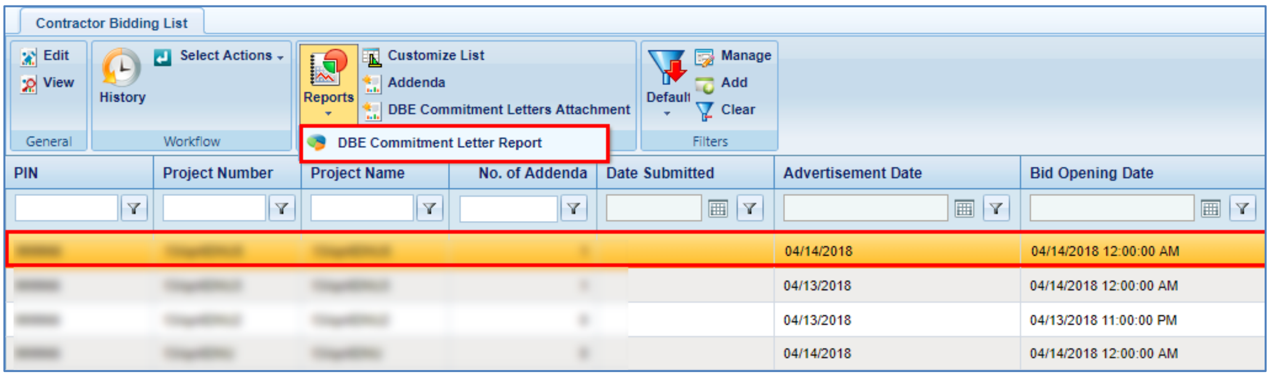


1.5 DBE Commitment Letter

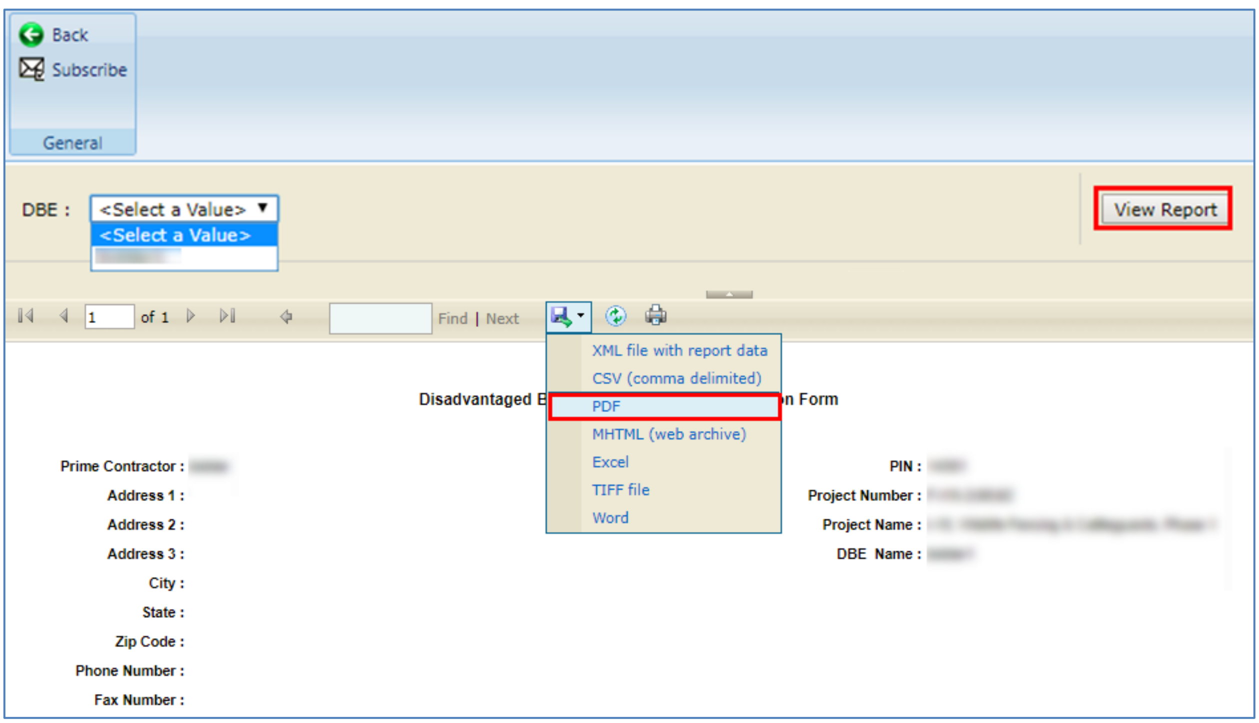
After submitting the bid response, the bidders have to generate the **DBE Commitment Letters** for each DBE selected in the **DBE Commitment** tab and submit the DBE Commitment Letters to Civil Rights.

Steps

1. In the **Contractor Bidding List** page, select the required bid.
2. On the toolbar, click **Reports** and then click **DBE Commitment Letter Report**.



3. From the **DBE** drop-down list, select the DBE and click **View Report.** The **DBE Commitment Letter Report** is displayed.
4. Save the report as PDF file to your local storage media.



5. Print the PDF file.
6. Take the signatures of the required representatives on the DBE commitment letter report document.
7. Repeat the steps 1 to 6 for each DBE added in the **DBE Commitment** tab.
8. Scan the signed DBE commitment letter report document.

9. On the toolbar, in the **Others** group, click **DBE Commitment Letters Attachment**. The **DBE Commitment Letters Attachment Form** is displayed.
10. Attach the scanned DBE commitment letter report document.
    For information on file attachments, refer *Attachments*.
11. To submit the attachments, in the **Workflow** group click **Submit** and then click **OK**. The **DBE Commitment Letter Report** is set to **Submitted** status.

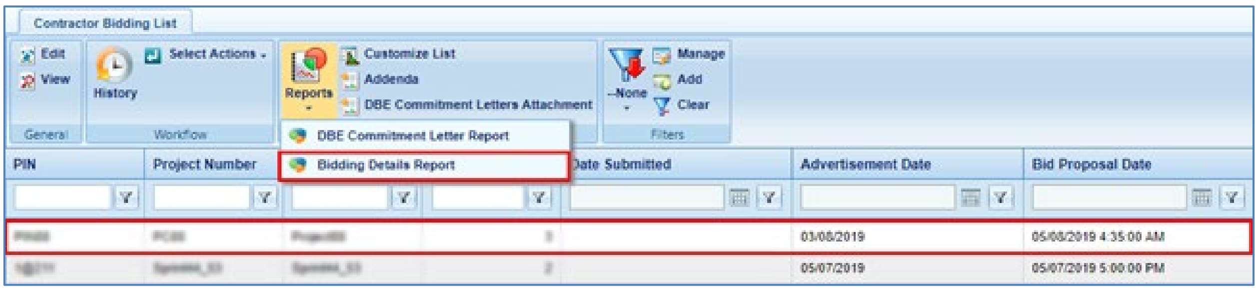
1.6 Bidding Details Report

The **Bidding Details Report** displays the information detailed in the e-Bidding form and the bid response entered by the bidder. You can generate the **Bidding Details Report** for the bid responses in the Contractor Bidding List page.

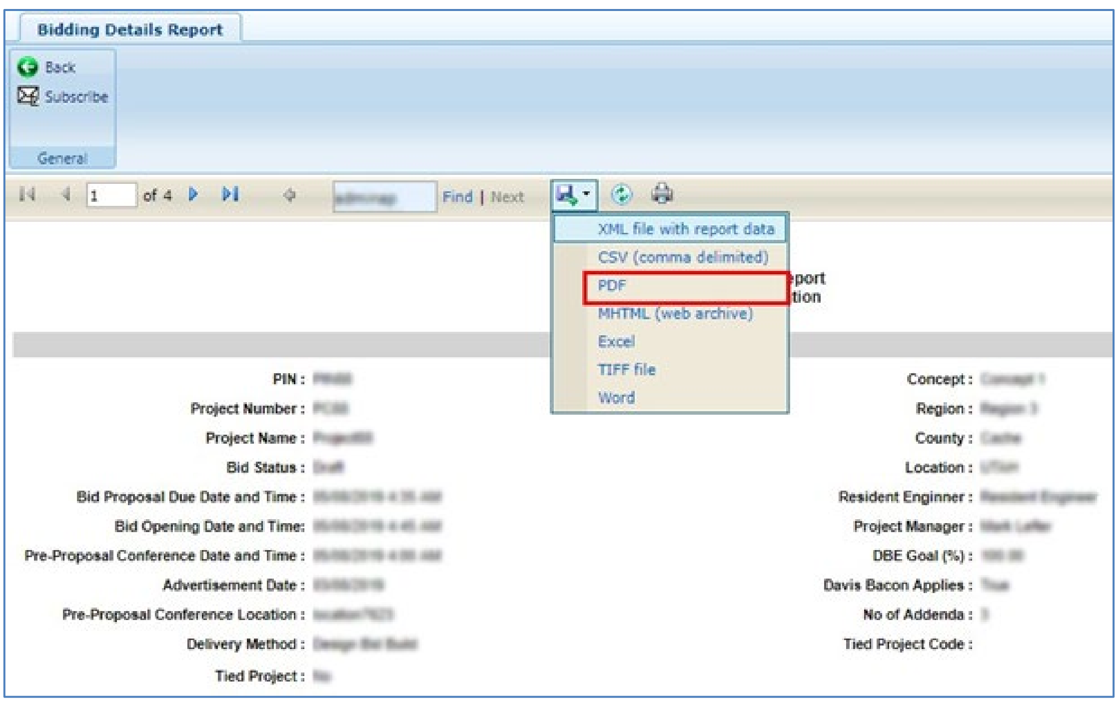
To generate a report, the selected bid response must be saved or submitted.

Steps

1. In the **Contractor Bidding List** page, select the required bid.
2. On the toolbar, click **Reports** and then click **Bidding Details Report**.
   The **Bidding Details Report** is displayed.



3. Save the report as PDF file to your local storage media.



4. Print the PDF file.

1.7 Attachments

1.7.1 Attaching a File to a Form

You can attach only .pdf files as attachments to a form. To upload the .pdf files to a form, perform the following steps in the **Attachments** section.

Steps

5. Click **Upload Document**. The **Choose File to Upload** dialog box is displayed.
6. To upload a single file, click the required file.
   Alternatively, to upload multiple files, press CTRL, and then click the required files.
7. Click **Open**.
   The files are uploaded to the form and are displayed in the attachment grid.
8. In the **Title** column, enter the titles for the files attached.

