# E-Bidding Module Participants Guide

aurigo®

MASTERWORKS

CLOUD

# Table of Contents

# 1. Bidding

## 1.1. E-Bidding Module

### 1.1.1. e-Bidding

The e-Bidding module in Masterworks ensures a highly confidential bidding process. Contractors log into Masterworks using the registered username and password to access the e-Bidding module. In the **e-Bidding** module, the contractors view the advertisements, acknowledge addenda (if any), and respond to the advertised bids. All the forms in this module are only available to the contractors (bidders). NDOT owners cannot access this module. This ensures the integrity of the entire e-bidding process and security protocols.

Using the **e-Bidding** module, contractors can perform the following:

- View the details of the advertisement and the addenda
- View documents related to the bid
- Enter the bid details
- Upload required documents
- Submit the bid
- Modify the bid
- Withdraw the bid

The e-Bidding module has multiple forms that can be accessed as tabs or as toolbar options in the **CONTRACTOR BIDDING LIST** page.

The form has multiple tabs as mentioned below:

- Contract Information
- Bid Items/Guaranty
- Subcontractors/Suppliers
- DBE/SBE Commitment
- Project Workforce
- Contractor Information
- Disclosure of Lobbying Activities (Only for Federal-funded projects)
- Suspension or Debarment
- Prime Contractor Statement of Performance
- Uniform Affidavit of Certification (Only for State-funded projects)

The forms that can be accessed from the toolbar of the list page are:

- Addenda
- Certificate of Eligibility
- Post Bid Opening Attachment

Once an advertisement soliciting bids from contractors is published by NDOT, an advertised bid with **New** workflow status is created in the **e-Bidding** module for the contractors to bid on. It is displayed in the **Contractor Bidding List** page.

The **e-Bidding** module enables you to perform the following tasks:

- Submit the bid
- Modify the submitted bid
- Acknowledge the addenda
- View the snapshot of a bid
- Update the Certificate of Eligibility
- Upload the post-bid opening attachments
- E-Bidding module Workflow stages

## 1.1.2. Submitting the Bid Response

### Before You Begin

To view a bid:

- The associated project is advertised.
- The date and time of bid-opening of the associated project has not elapsed.

To respond to a bid:

- The Bidder meets the following pre-qualification conditions:
  - The **Bidding Capacity ($)** in the **Contractor Information** tab is equal to or more than the upper limit of the **Engineer's Estimate Range ($)** in the **Contract Information** tab.
  - The **Prequalification Expiration Date** in the **Contractor Information** tab is not less than the **Bid Opening Date and Time** in the **Contract Information** tab.
- The company associated with the bidder is verified to be in attendance, in case of projects with **Pre-Bid Meeting Type** as *Mandatory* in the **Contract Information** tab.

### Overview

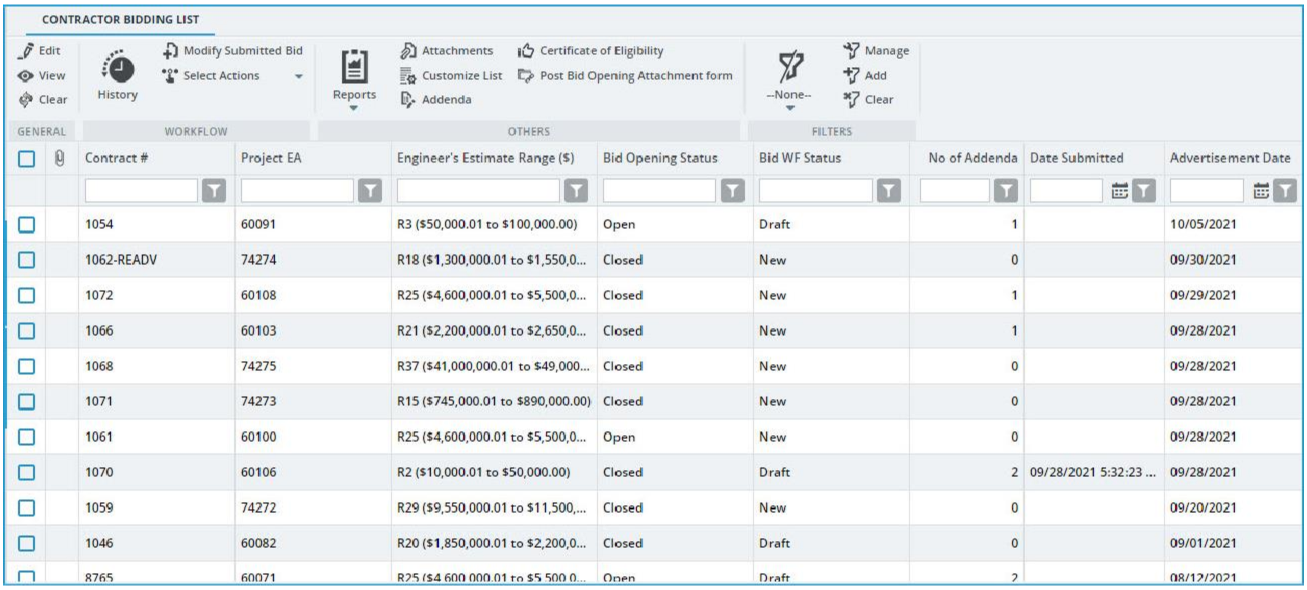
The **e-Bidding** module enables you to view the advertised contracts and submit bids.

You can also acknowledge the addenda, add details of subcontractors and suppliers, update the certificate of eligibility, and upload post-bid opening attachments.

### Steps

1. Log into Masterworks using your username and password provided by NDOT.

   The **CONTRACTOR BIDDING LIST** page is displayed.




| Contract # | Project EA | Engineer's Estimate Range ($) | Bid Opening Status | Bid WF Status | No of Addenda | Date Submitted | Advertisement Date |
|---|---|---|---|---|---|---|---|
| 1054 | 60091 | R3 ($50,000.01 to $100,000.00) | Open | Draft | 1 | | 10/05/2021 |
| 1062-READV | 74274 | R18 ($1,300,000.01 to $1,550,0... | Closed | New | 0 | | 09/30/2021 |
| 1072 | 60108 | R25 ($4,600,000.01 to $5,500,0... | Closed | New | 1 | | 09/29/2021 |
| 1066 | 60103 | R21 ($2,200,000.01 to $2,650,0... | Closed | New | 1 | | 09/28/2021 |
| 1068 | 74275 | R37 ($41,000,000.01 to $49,000... | Closed | New | 0 | | 09/28/2021 |
| 1071 | 74273 | R15 ($745,000.01 to $890,000.00) | Closed | New | 0 | | 09/28/2021 |
| 1061 | 60100 | R25 ($4,600,000.01 to $5,500,0... | Open | New | 0 | | 09/28/2021 |
| 1070 | 60106 | R2 ($10,000.01 to $50,000.00) | Closed | Draft | 2 | 09/28/2021 5:32:23 ... | 09/28/2021 |
| 1059 | 74272 | R29 ($9,550,000.01 to $11,500,... | Closed | New | 0 | | 09/20/2021 |
| 1046 | 60082 | R20 ($1,850,000.01 to $2,200,0... | Closed | Draft | 0 | | 09/01/2021 |
| 8765 | 60071 | R25 ($4 600 000.01 to $5 500 0... | Open | Draft | 2 | | 08/12/2021 |

2. To view a project, select the record and then click **View**.

   The **Contract Information** tab is displayed.

3. To respond to an advertised contract, in the **CONTRACTOR BIDDING LIST** page, perform the

following steps:

a. Select the record that is in the **New** workflow status, click **Select Actions**, and then click **Create Bid Draft**.

   The Masterworks dialog box is displayed.

b. In the Masterworks dialog box, click **OK**.

   The record is moved to the **Draft** workflow status.

In case of projects with a mandatory pre-bid meeting, the **Submit Bid** workflow action is not allowed if the pre-bid meeting has not been attended.

The projects for which the bid opening date and time has elapsed are no longer available for bidding, and the **Create Bid Draft** workflow action is not allowed. Use the **FILTERS** toolbar to view the current projects available for bidding.

4. In the **CONTRACTOR BIDDING LIST** page, select the project that is in the **Draft** workflow status, and click **Edit**.

   The **Bid Opening Time Countdown** displays the countdown to the bid-opening.

   The **Two Hours Submission Countdown** displays the 2-hour countdown after the bid-opening, by which the details of the subcontractors or suppliers can be updated, and the Post Bid Opening Attachments can be attached.

   The details of the subcontractor or supplier must be added or updated within the 2-hour submission window if:

   - The subcontractor's bid amount is more than 1% but less than 5% of the total bid amount.
   - The total bid amount exceeds $25,000,000 and the subcontractor's bid amount exceeds $250,000.
   - The subcontractor is not a Disadvantaged Business Enterprise (DBE) or a Small Business Enterprise (SBE).

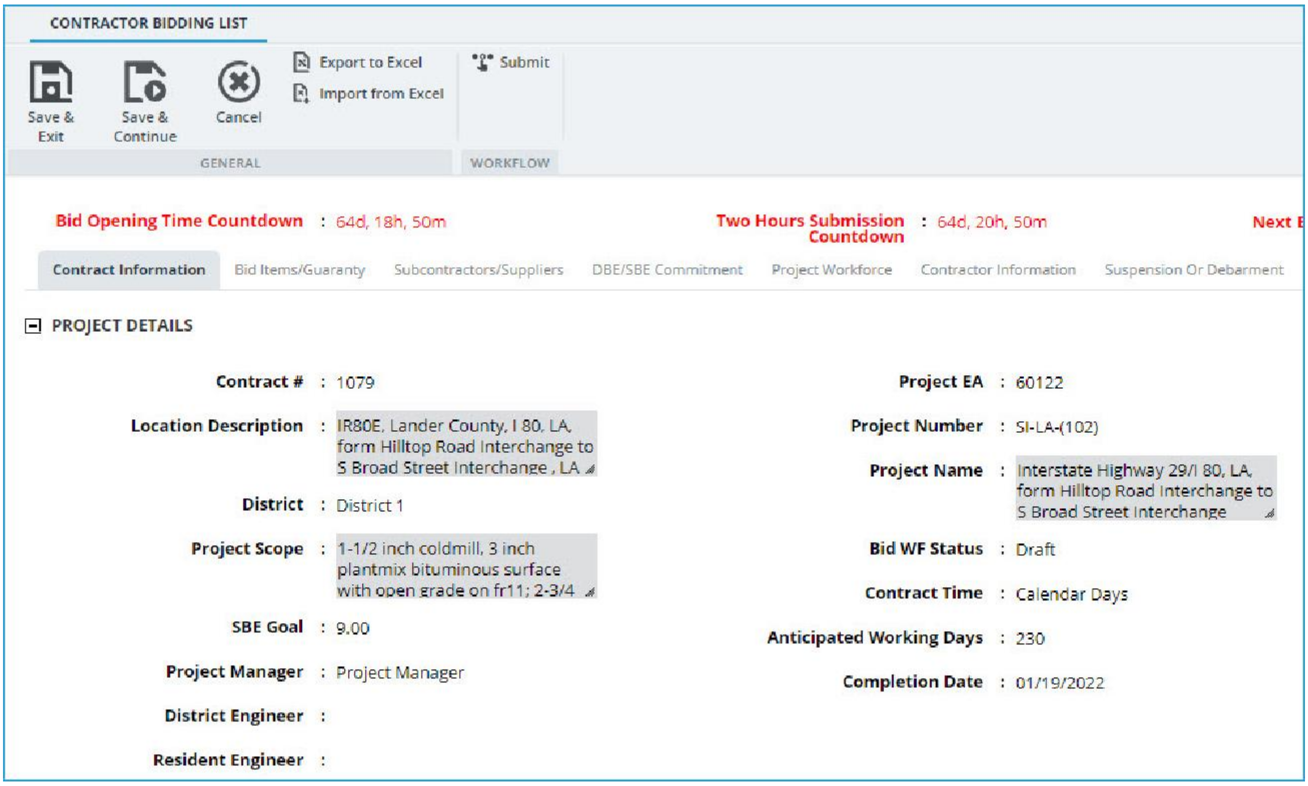
   The details of the subcontractors or suppliers cannot be edited or deleted if:

   - The bid amount of the subcontractor or supplier is 5% of the total bid amount, or more.
   - The subcontractor or supplier is a DBE or an SBE.

   The **Next Business Day Submission Countdown** displays the countdown until the next business day following the bid-opening, by which the details of the subcontractors or suppliers can be updated. The details of the subcontractors or suppliers cannot be added, edited, or deleted if:

   - The bid amount of the subcontractor or supplier is 1% of the total bid amount, or more
   - The subcontractor or supplier is a DBE or an SBE

The **Contract Information** tab displays the project information and the details of the advertisement.




5. To edit the bidding details, perform the following steps:
   a. Click the **Bid Items/Guaranty** tab.

The **BID ITEMS** table displays the following.

| Column Name | Description |
|---|---|
| Sequence Number | The line number of the bid item is displayed. |
| Item Number | The item number of the bid item as specified in the project is displayed. |
| Item Description | The bid item description as specified in the project is displayed. |
| Unit | The unit of the bid item is displayed. |
| Quantity | The quantity of the bid item is displayed. |
| Unit Price($) | The unit price of the bid item is displayed. |
| Amount($) | The value of the bid item is displayed.<br>Calculated as:<br>*Amount($) = Unit Quantity * Unit Price($)* |
| Addendum Number | The addendum number of the latest addenda in which the item is modified is displayed. |
| Additive Number | The additive number as specified in the project is displayed |

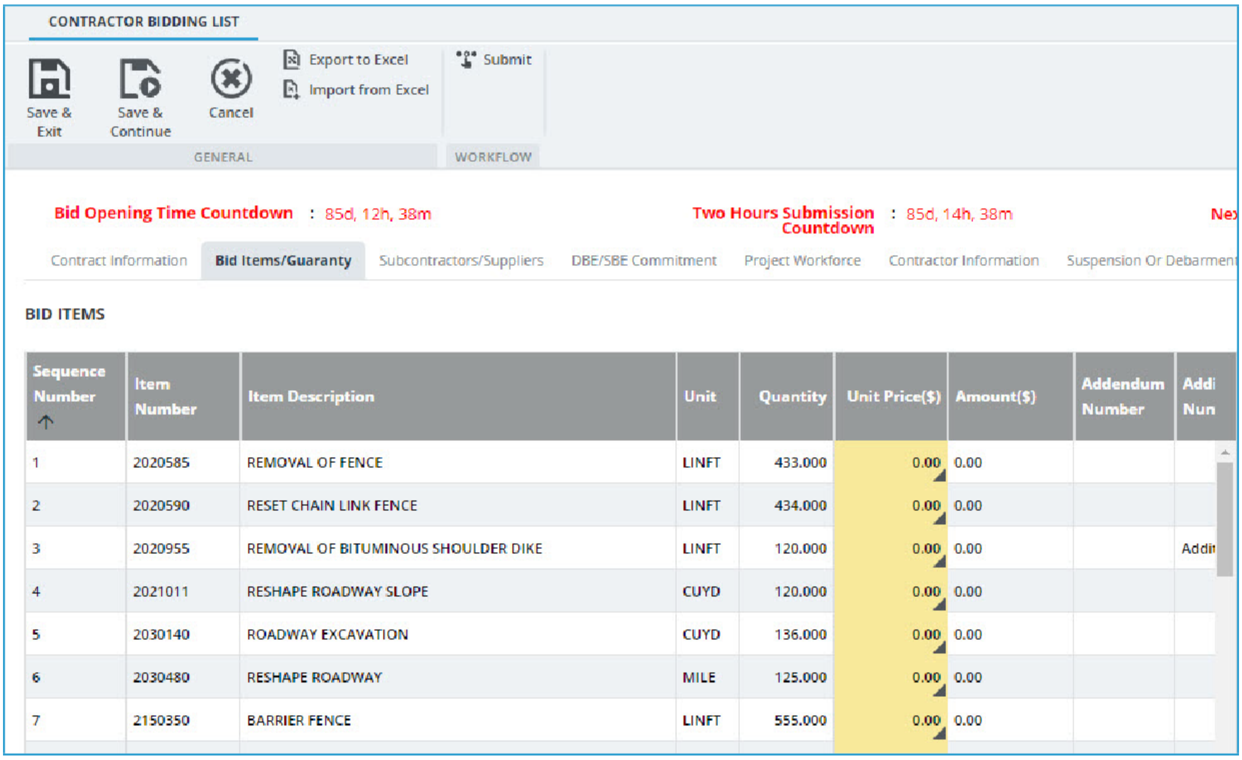
The editable cells are highlighted. If the unit price of a bid item is pre-defined by NDOT, the bid item is not editable.

The total value of the bid items is displayed at the bottom right corner of the table.

b. To edit the unit price, in the **Unit Price ($)** column of the appropriate item row, click and enter the unit price for the bid item.

The **Amount($)** column is updated.

The total value of the bid items as displayed at the bottom right corner of the table is updated.




c. Alternatively, you can export the **Bid Items** list page as a Microsoft Excel template using the **Export to Excel** option, edit the highlighted values, and then upload the updated Microsoft Excel template using the **Import from Excel** option.

d. To enter details of the bid guaranty, in the **BID GUARANTY** section, perform the following steps:

i. In the **Surety type** field, select the surety type from the drop-down list.

Available options are the surety types defined in NDOT's **Surety Type** catalog of the library.

> **NOTE:** The **Surety 2000** and **SurePath** applications are integrated with Masterworks to validate the bond number specified by the bidder.

ii. In the **Bond or Check #** field, enter the bond or check number.

> **NOTE:** This field is not available if the **Surety type** is **Cash**.

iii. Click the **Validate Bond** button to validate the bond.

> **NOTE:** The **Validate Bond** button is enabled only if the **Surety type** is **Surety 2000** or **SurePath**.

The **Bond Status** is automatically updated as follows:

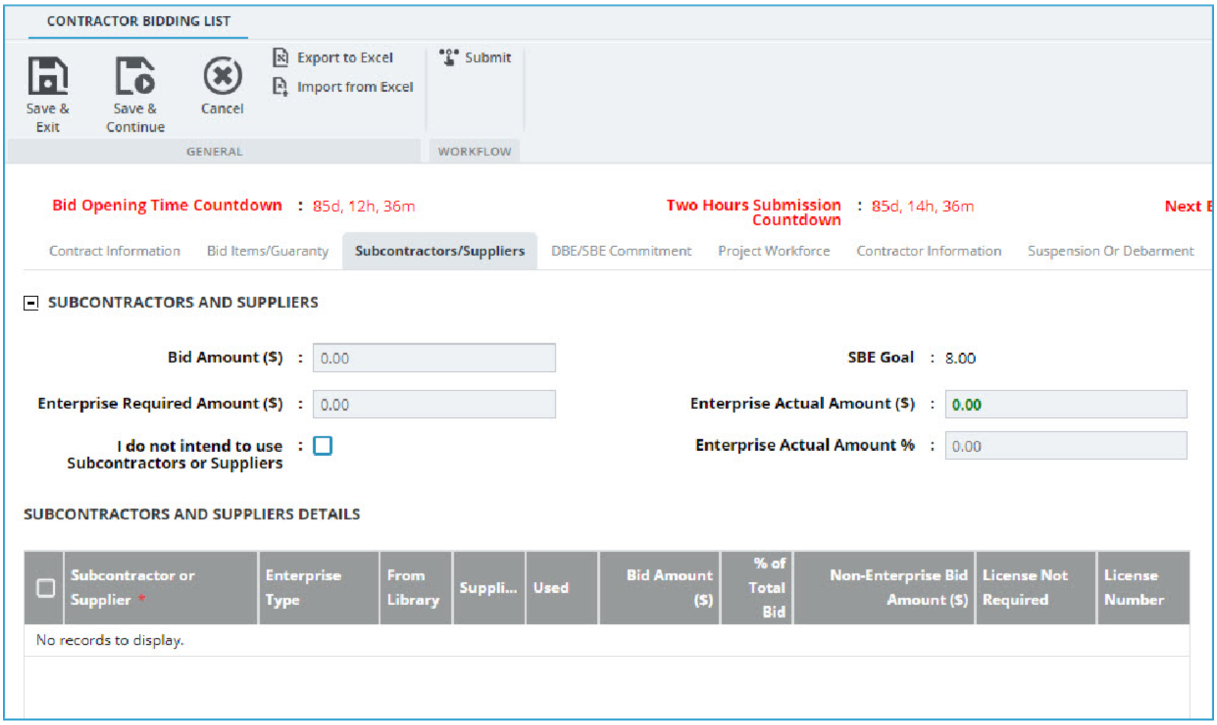
- If the bond status is validated by **Surety 2000** or **SurePath**, then the appropriate bond status is automatically displayed as **Validated**.
- Otherwise, **Completed** is displayed.

The **Guaranty Amount ($)** is calculated as:

*Guaranty Amount ($) = 5% of the total value in **Amount ($)** column of the **BID ITEMS** table*

6. To edit the details of the subcontractors or suppliers, perform the following steps:

   a. Click the **Subcontractors/Suppliers** tab.



The following information is displayed in the **SUBCONTRACTORS AND SUPPLIERS** section.

| Field Name | Description |
|---|---|
| Bid Amount ($) | The total value of the bid items as specified in the associated **Bid Items/Guaranty** tab is displayed. |
| [DBE/SBE] Goal | The DBE or SBE goal percentage as specified in the **Contract Information** tab is displayed. |
| Enterprise Required Amount ($) | This field is auto-calculated according to the following formula:<br>*Enterprise Required Amount ($) = Bid Amount ($) * [DBE/ SBE] Goal* |
| Enterprise Actual Amount ($) | For an SBE contract, this field is calculated as:<br>**Enterprise Actual Amount ($)** = Sum of the **Bid Amount ($)** column – Sum of **Non-Enterprise Bid Amount ($)** column, where **Enterprise Type** column is SBE or DBE/ SBE and **Used** column is checked.<br>For a DBE contract, this field is calculated as:<br>**Enterprise Actual Amount ($)** = Sum of the **Bid Amount ($)** column – Sum of **Non-Enterprise Bid Amount ($)** column, where **Enterprise Type** column is DBE/SBE and **Used** column is checked.<br>If the **Used** and **Supplier** column is checked then, this field is calculated as:<br>**Enterprise Actual Amount ($)** = 0.6*(Sum of the Bid Amount ($) column - Sum of Non-Enterprise Bid Amount ($) column)<br>If the **Enterprise Actual Amount ($)** is less than the **Enterprise Required Amount ($)**, then it is displayed in red. |
| Enterprise Actual Amount % | The percentage value of the **Enterprise Actual Amount ($)** is displayed. |

b. Select the **I do not intend to use Subcontractors or Suppliers** check box to indicate that the prime contractor will not use a subcontractor or supplier.

   If the check box is selected, then to meet the enterprise goal, add the prime contractor's information in the **SUBCONTRACTORS AND SUPPLIERS** table.

c. To add registered subcontractors or suppliers, in the **SUBCONTRACTORS AND SUPPLIERS DETAIL** section, perform the following steps:

i. Click **Add from Library**.

The **Subcontractor or Supplier** dialog box is displayed.

Available options are contractors defined in NDOT's **Contractors Details** catalog of the library.

ii. Select the appropriate records, and then click **Select**.

Alternatively, click **Select All Records** to select all the records in the dialog box.

The selected records are added to the table.

> **NOTE:** You can select the same subcontractor or supplier more than once.

d. To add new subcontractors or suppliers, in the **SUBCONTRACTORS AND SUPPLIERS** section, perform the following steps:

i. Click **Add New**.

A new row is added to the table that is editable inline.

ii. Provide the following information as described in the table.

| Column | Description |
|---|---|
| Subcontractor or Supplier | Enter the name of the subcontractor or supplier.<br>The **Enterprise Type** is automatically displayed after the subcontractor or supplier is added to the Contractors Details catalog of the library by NDOT.<br>If the subcontractor or supplier is added from the library, then the **From Library** check box is checked. |
| Supplier | Select the **Supplier** check box to indicate that this is a supplier. |
| Used | Select the **Used** check box to indicate that the prime contractor has used the subcontractor. |
| Bid Amount ($) | Enter the bid amount for the contract.<br>The **% of Total Bid** value is automatically updated as:<br>*% of Total Bid = Bid Amount ($) / Bid Amount ($) submitted by the contractor * 100* |
| Non-Enterprise Bid Amount ($) | Enter the bid amount for the non-enterprise items of the contract. |
| License Not Required | Select the **License Not Required** check box to indicate that no license is required for the contract. If the **License Not Required** check box is selected, then the **License Number**, **License Unlimited**, and **License Limit ($)** fields are not editable. |
| License Number | Enter the license number. |
| License Unlimited | Select the **License Unlimited** check box to indicate that the license does not have a cash limit. If the **License Unlimited** check box is selected, then the **License Limit ($)** field is not editable. |
| License Limit ($) | In the **License Limit ($)** field, enter the cash limit associated with the license. |
| Work Description | Enter the work description. |

The **Bid Items** column displays whether the bid items corresponding to the subcontractor or supplier have been selected for consumption.

e. To select bid items for consumption, in the **SUBCONTRACTORS AND SUPPLIERS** section, perform the following steps:

i. Select the appropriate subcontractor or supplier and click **Edit Bid Items**.

The name of the contractor is displayed in the **BID ITEMS** section.

The **BID ITEMS** table displays all the associated bid items. The editable cells are highlighted.

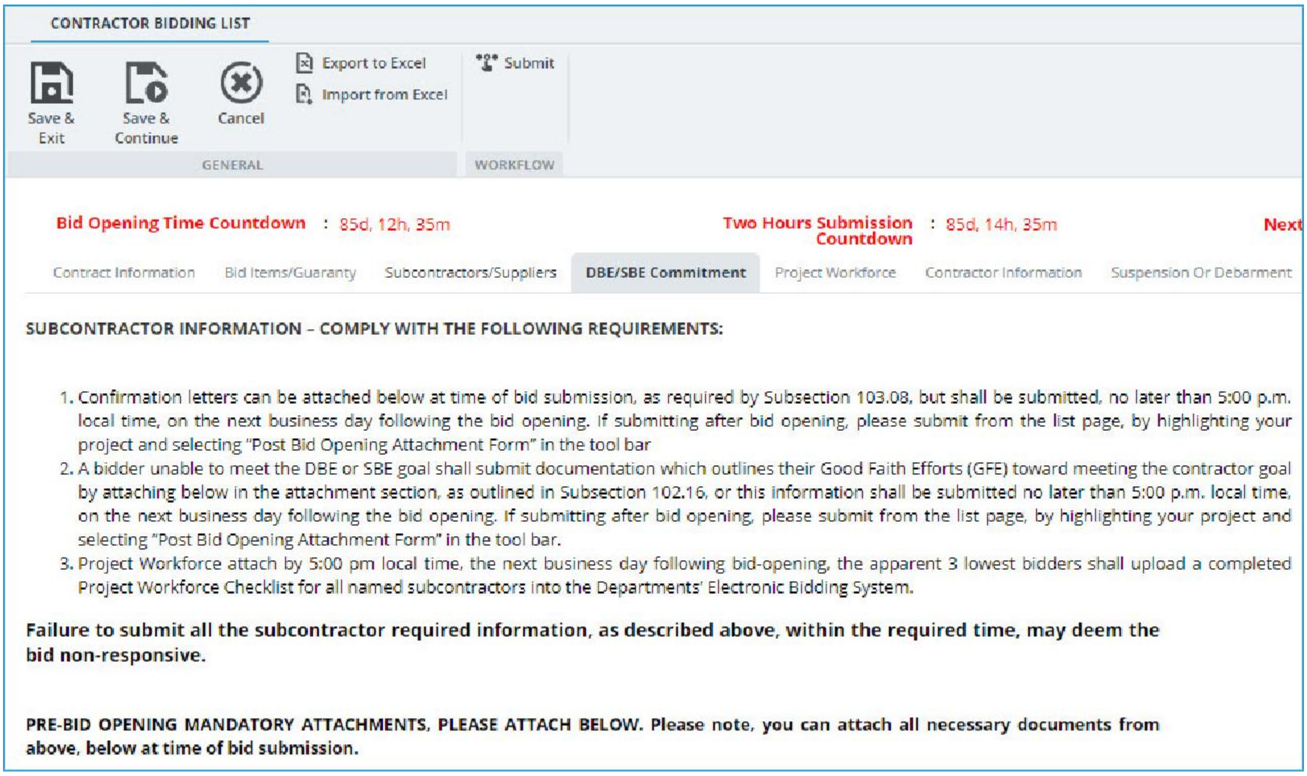
ii. Corresponding to the appropriate row, select the check box in the **Partial Item** column to indicate that only part of this bid item is performed by the subcontractor or supplier.

iii. Corresponding to the appropriate bid item row, select the check box in the **Full Item** column to indicate that this bid item is completely performed by the subcontractor or supplier.

iv. Click **Confirm**.

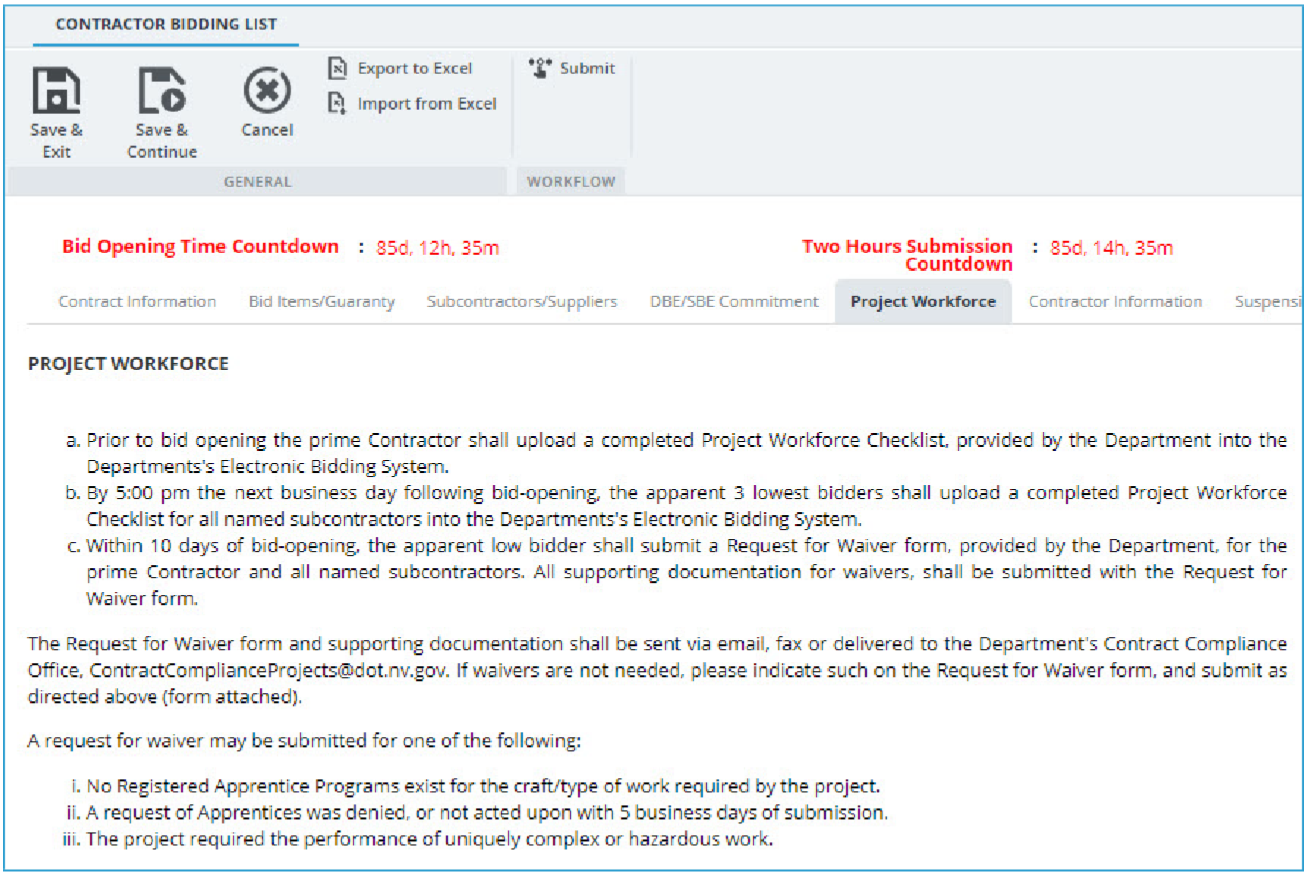
The **Bid Items** column in the **SUBCONTRACTORS AND SUPPLIERS** section corresponding to the selected subcontractor or supplier is updated.

7. To attach pre-bid opening mandatory attachments, click the **DBE/SBE Commitment** tab, and then in the attachments section, attach related files.
For additional information on attachments, refer to Attachments.

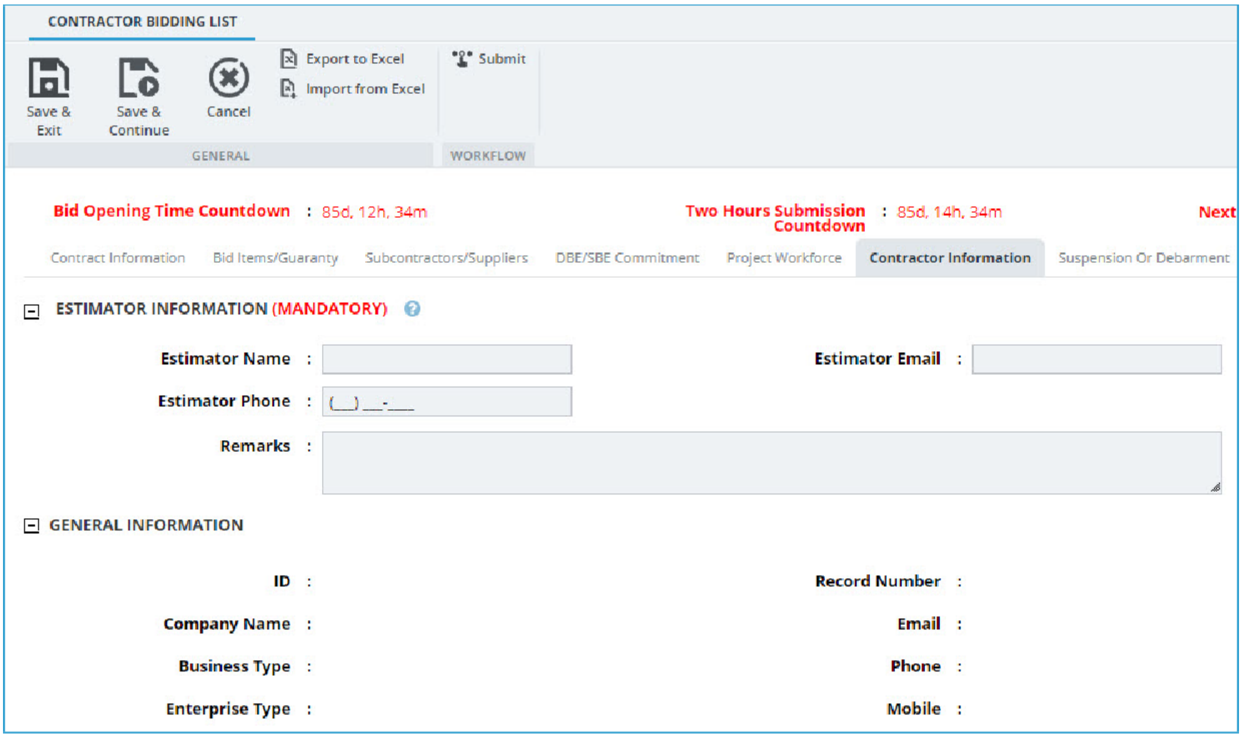



8. To attach the workforce or apprentice utilization forms and supporting documentation, click the **Project Workforce** tab, and then in the attachments section, attach related files.

For additional information on attachments, refer to Attachments.




9. To edit estimator information, perform the following steps:
    a. Click the **CONTRACTOR INFORMATION** tab.




The following information is displayed in the **ESTIMATOR INFORMATION** section.

| Field Name | Description |
|---|---|
| Estimator Name | Enter the name of the person estimating the bidder's price for each bid item. |
| Estimator Phone | Enter the contact number of the person estimating the bidder's price for each bid item. |
| Estimator Email | Enter the email address of the person estimating the bidder's price for each bid item. |
| Remarks | Enter any additional information. |

The **GENERAL INFORMATION** section displays the details of the contractor, as defined in NDOT's **Contractors Details** catalog of the library.

The **ID** and **Record Number** uniquely identify the contractor and are automatically generated by NDOT.

The **ADDRESSES** table displays a list of addresses associated with the contractor, as defined in NDOT's **Contractors Details** catalog of the library.

The **PREQUALIFICATION** section displays the following pre-qualification information, as defined in NDOT's **Contractors Details** catalog of the library:

- **Bidding Capacity ($)** – The bidding capacity of the bidder is displayed.
- **Bidding Capacity Limit** - If **Bidding Capacity ($)** is more than $25 million, then **Unlimited** is displayed. Otherwise, **Limited** is displayed.
- **Pre-Qualification Expiration Date** – The date on which the bidder's pre-

qualification expires is displayed.

The **LICENSES & STANDINGS** section displays the following pre-qualification information, as defined in NDOT's **Contractors Details** catalog of the library:

- **Business License #** - The bidder's business license is displayed.
- **Business License Expiration Date** - The date on which the bidder's business license expires is displayed.

The **CONTRACTOR LICENSE DETAILS** table displays a list of the contractor's licenses and the corresponding details, as defined in NDOT's **Contractors Details** catalog of the library.

The **PRINCIPAL/TITLE VI INFORMATION** section displays the gender and the race of the disadvantaged business enterprise, available in NDOT's **Contractors Details** catalog of the library.

The **USER INFORMATION** section displays the login details of users and the details of the company contacts.

The **USER LOGIN DETAILS** table displays a list of all the users who logged into the system. It lists the user details such as account status, username, first and last name, email address, and role.

The **COMPANY CONTACTS** table displays the details of the company's contacts. It lists the first and last name, phone number, email address, contact role, and additional information of the contact, as available in NDOT's **Contractors Details** catalog of the library.

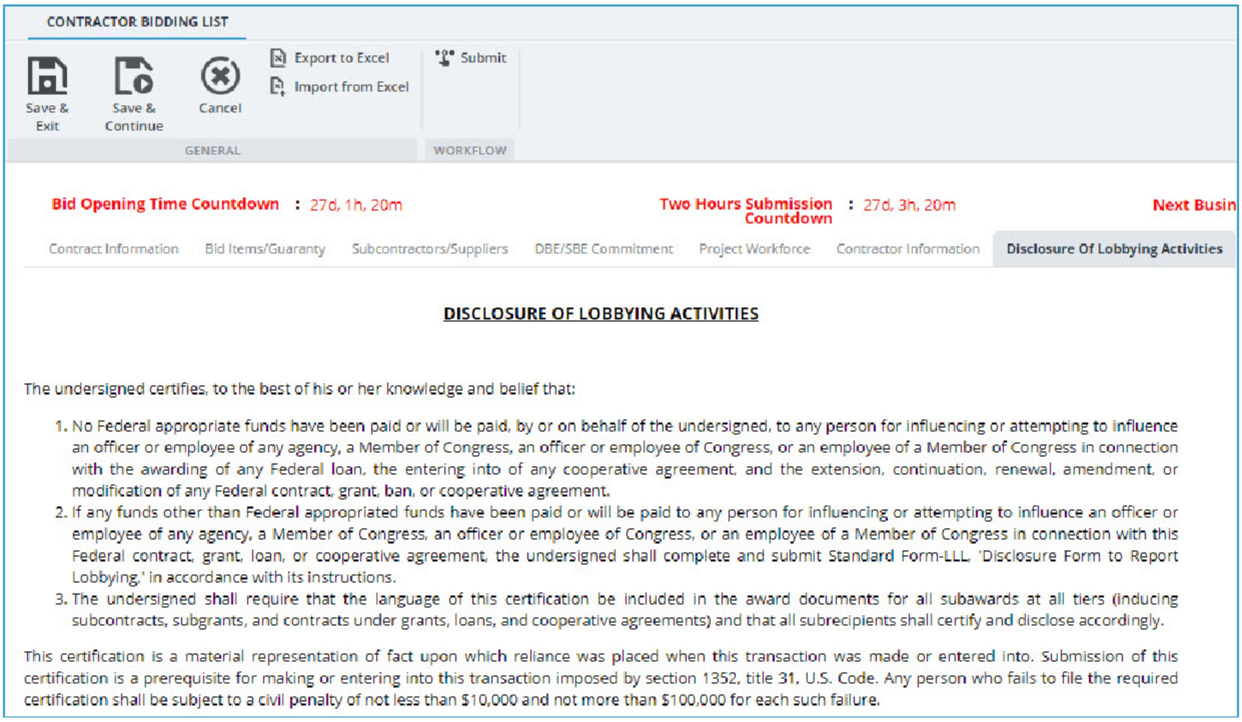
b. Optionally, in the **ATTACHMENTS** section, attach or link related files.

   For additional information on attachments, refer to Attachments.

10. To acknowledge the Disclosure of Lobbying Activities, perform the following steps:

> **NOTE:** This tab is available only if the **Funding Type** in the associated **Project Details** page is **Federal**.

a. Click the **Disclosure of Lobbying Activities** tab.



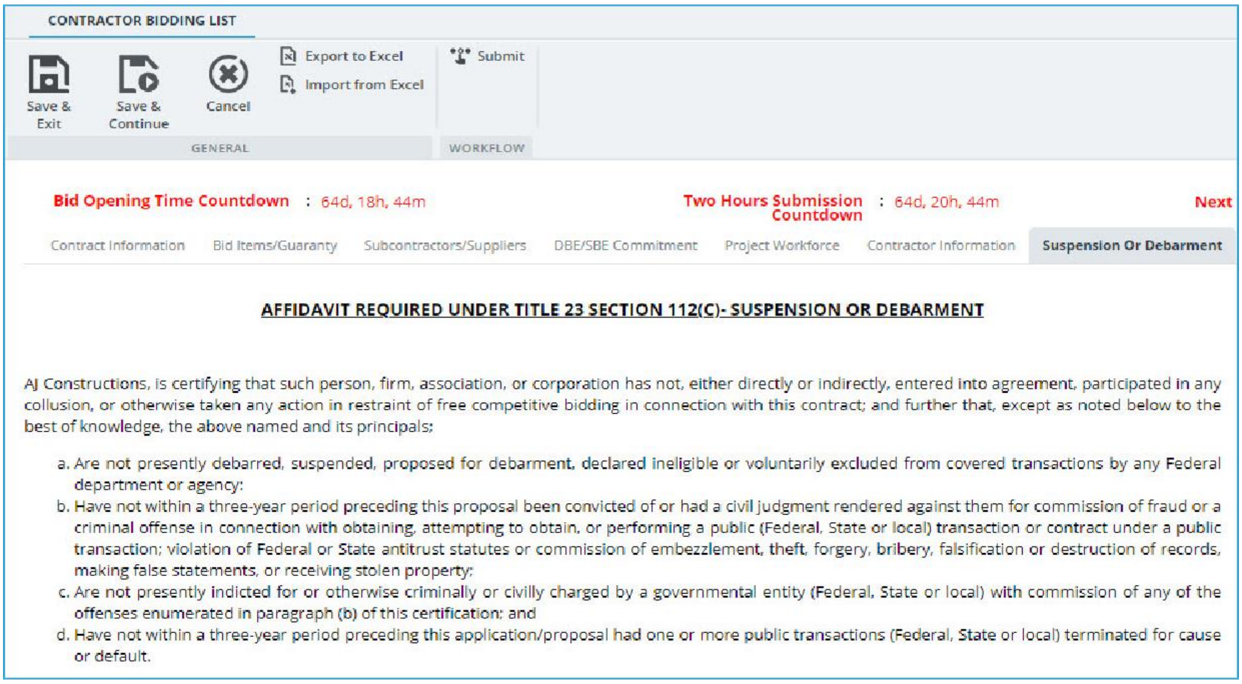

b. Click either of the following options:

- Click **Yes** to indicate involvement in lobbying activities.
- Click **No** to indicate no involvement in lobbying activities.

The **Acknowledged By** field displays the first name, middle name, and last name of the logged-in user, acknowledging the disclosure of lobbying activities.

11. To acknowledge the disclosure of collusion information, perform the following steps:

a. Click the **Suspension or Debarment** tab.




b. Click either of the following options:

- Click **Yes** to indicate that there is a prior or pending suspension or debarment.

  Details of the suspension or debarment must be added in the **SUSPENSION OR DEBARMENT LISTING** section.
- Click **No** to indicate that there is no prior or pending suspension or debarment.

The **Acknowledged By** field displays the first name, middle name, and last name of the logged-in user acknowledging the disclosure of collusion information.

c. To add details about the suspension or debarment, in the **SUSPENSION OR DEBARMENT LISTING** section, perform the following steps:

   i. Click **Add**.

      The **New Suspension or Debarment Listing** dialog box is displayed.

   ii. In the **Applies to Whom** field, enter the name of the company to whom the suspension or debarment applies.

   iii. In the **Initiating Agency** field, enter the name of the agency that initiated the suspension or debarment.

   iv. In the **Date** of action field, select the date on which the suspension or debarment was initiated.

   v. In the **Comments** field, enter any additional information.

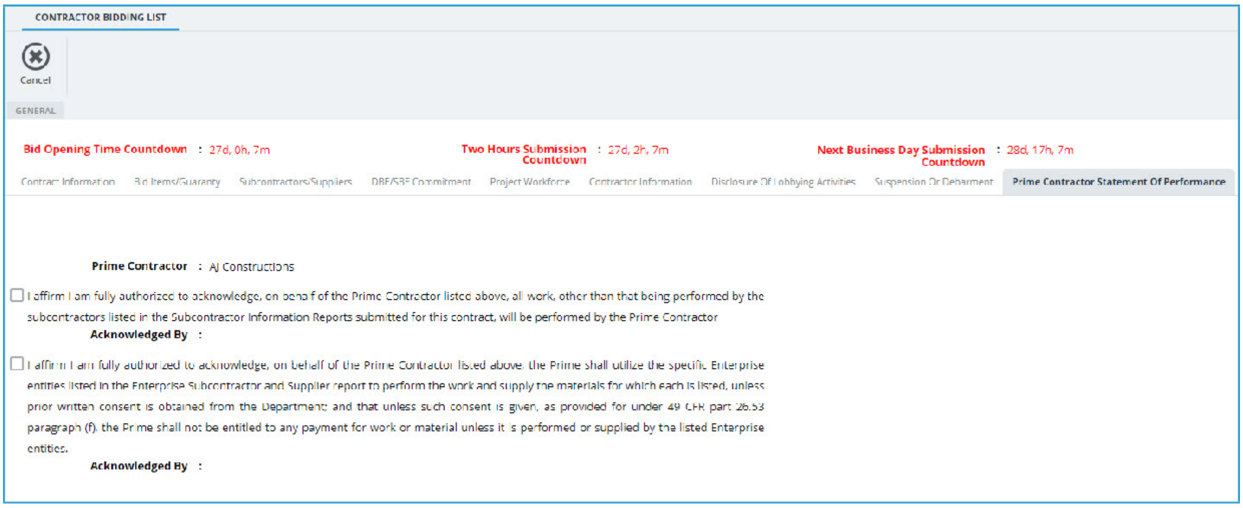
   vi. Click **Save**.

      The record is added to the **SUSPENSION OR DEBARMENT LISTING** table.

12. To acknowledge the prime contractor statement of performance, perform the following steps:

    a. Click the **Prime Contractor Statement of Performance** tab.

       The name of the prime contractor as specified in the **Company Name** field of the associated **Contractor Information** page is displayed.




    b. Select the check box corresponding to each acknowledgment.

       The **Acknowledged By** field, corresponding to each statement, displays the first name and last name of the user who selects the check box to acknowledge the **Prime Contractor Statement of Performance**.

13. To acknowledge the Uniform Affidavit of Certification, perform the following steps:

> **NOTE:** This tab is available if the **Funding Type** in the associated **Project Details** page is **State**.

a. Click the **Uniform Affidavit of Certification** tab.

   The contract number as specified in the **Contract #** field of the associated **Contract Information** page is displayed.

   The **CERTIFICATE OF ELIGIBILITY** section displays the **Certificate of Eligibility Expiration Date** as specified in the associated **CERTIFICATE OF ELIGIBILITY** form. The certificate of eligibility is required for contractors who are based out of the state where the project is being executed.

b. To acknowledge the affidavit, select the check box towards the end of the declaration. The **Acknowledged By** field displays the first name and last name of the user acknowledging the **Uniform Affidavit of Certification**.

14. To save the bid response details, click **Save**.

    The bid response is saved, and a snapshot of the bid response is created.

15. To submit the bid, perform the following steps:

    a. In the **CONTRACTOR BIDDING LIST** page, select the appropriate record that is in the **Draft** workflow stage, and then click **Select Actions**.

    b. Click **Submit** and in the Masterworks dialog box, click **OK**.

       The workflow stage of the record is set to **Submitted**.

       To obtain business decisions from the various stakeholders, transition the record through the defined workflow.

## 1.1.3. Modifying the Submitted Bid Response

### Before You Begin

- The bid is available in the **Submitted** workflow status.
- The bid-opening date and time of the bid is not elapsed.

### Overview

You can modify the submitted bid response provided that the bid-opening date and time is not elapsed.

### Steps

1. In the **CONTRACTOR BIDDING LIST** page, select the appropriate bid, and in the **WORKFLOW** group, click **Modify Submitted Bid**.

   The **CONTRACTOR BIDDING LIST** page is displayed.

2. Edit the bid details as required.

   For more information refer to step 0.

3. Click **Save & Update Bid Submittal**.

   The bid response is saved, and snapshot of the latest bid is created. Once it is past the bid opening date and time, the latest submitted bid is considered for the Bid opening, review, and approval process.

## 1.1.4. Acknowledging Addenda

### Before You Begin

- The addendum is available; that is, in the **CONTRACTOR BIDDING LIST** page, the value in the **No. of Addenda** column corresponding to the bid is not 0.

### Overview

If the bid response for the advertised project is submitted, and NDOT issues a new addendum, the bid response record is automatically moved to the **Draft** workflow status irrespective of the current workflow status.

You must acknowledge the new addendum and then re-submit the bid.

### Steps

1. In the **CONTRACTOR BIDDING LIST** page, select the appropriate bid, and in the **OTHERS** group, click **Addenda.**

   The **ADDENDA** list page is displayed.

2. In the **ADDENDA** list page, select the addendum in the **New** workflow status, and then click **Edit**.

   The **Addendum Details** tab displays the recent changes to the advertisement details and the **Addendum Items** tab displays the recent changes in advertisement items.

3. To return to the **ADDENDA** list page, click **Cancel.**

4. To acknowledge the addendum, select the record, click **Select Actions,** and then click **Acknowledge.**

   The Masterworks dialog box is displayed.

5. In the Masterworks dialog box, click **OK.**

   The record is moved to the **Acknowledged** workflow status. You can now return to the **CONTRACTOR BIDDING LIST** page, update the bidding details in the **Bid Items** tab, and submit the bid.

### 1.1.5. Viewing the Snapshot of a Bid Response

**Overview**

As soon as a bid is submitted, a Snapshot of the bid is created and saved. Whenever a submitted bid is modified and re-submitted, a snapshot of the latest bid is created and saved in the list.

**Steps**

1. In the **CONTRACTOR BIDDING LIST** page, select the appropriate bid record.
2. In the **OTHERS** toolbar, click **Snapshot**.
   The **CONTRACTOR BIDDING SNAPSHOT** list page is displayed.
3. Select the appropriate snapshot and click **View**.
   The bid response details corresponding to the selected snapshot are displayed.

## 1.1.6. E-Bidding Module Workflow Stages

| Phase | Current Workflow Status | Stakeholders | Action | Subsequent Workflow Status | Comments |
|---|---|---|---|---|---|
| 1 | New | Bidder | Create Bid Draft | Draft | • You can respond to an advertised bid only when the bid is in the **Draft** workflow status.<br>• To move the record to the **Draft** workflow stage, the following conditions must be met:<br>◦ The **Bidding Capacity ($)** in the **Contractor Information** tab is equal to or more than the **Engineer's Estimate Range ($)** in the **Contractor Bidding List** page.<br>◦ The **Pre-Qualification Expiration Date** in the **Contractor Information** tab is not less than the **Bid Opening date and Time** in the **Contractor Bidding List** page.<br>◦ The company associated with the user is verified to be in attendance, in case of projects with **Pre-Bid Meeting Type** as **Mandatory** in the **Contract Information** tab. |

| Phase | Current Workflow Status | Stakeholders | Action | Subsequent Workflow Status | Comments |
|---|---|---|---|---|---|
| 2 | Draft | Bidder | Submit | Submitted | The forms are editable only in the **Draft** workflow stage.<br>To move the record to the **Submitted** workflow stage, ensure the following:<br>• The associated addenda records are in the **Acknowledged** workflow status.<br>• All fields in the **ESTIMATOR INFORMATION** section of the **Contractor Information** tab are updated.<br>• If the **Funding Type** is **Federal,** then the certification concerning **Disclosure of Lobbying Activities** is acknowledged.<br>• The certification concerning **Suspension or Debarment** is acknowledged.<br>• The **Prime Contractor Statement of Performance** is acknowledged.<br>• If **Funding Type** is **State,** then<br>◦ The **Uniform Affidavit of Certification** is acknowledged.<br>• In the **Bid Items/Guaranty** tab:<br>◦ All fields in the **BID GUARANTY** section are updated. |

| Phase | Current Workflow Status | Stakeholders | Action | Subsequent Workflow Status | Comments |
|---|---|---|---|---|---|
| | | | | | ◦ **Bond Status** in the **BID GUARANTY** section is **Completed.**<br>• In the **PROJECT WORKFORCE** section at least one attachment is available. |
| 3 | Submitted | Bidder | Click the **Modify Submitted Bid** option in the toolbar | Draft | • To edit a submitted record, click the **Modify Submitted Bid** option. You can move the record to the **Draft** workflow stage if the Bid Opening Date and Time is not elapsed.<br>• You cannot edit the form in the **Submitted** workflow stage. |
| | | | - | | If the bid is submitted and NDOT issues a new addendum, the record is automatically moved to the **Draft** workflow stage. You must acknowledge the new addendum and re-submit the bid. |
| | | | Withdraw Submitted Bid | Bid Withdrawn | You can move the record to the **Bid Withdrawn** workflow stage only if the Bid Opening Date and Time is not elapsed. |
| 4 | Bid Withdrawn | Bidder | Re-draft Bid | Draft | - |

## 1.1.7. Updating details of Certificate of Eligibility

**Before You Begin:**

- The **Certificate of Eligibility** is in the **Draft** workflow stage.

**Overview:**

You can update the details of the certificate of eligibility using the **Certificate of Eligibility** form.

**Steps:**

1. In the **CONTRACTOR BIDDING LIST** page, in the **OTHERS** group, click **Certificate of Eligibility**.

   The **CERTIFICATE OF ELIGIBILITY** page is displayed.

   The **Certificate of Eligibility Expiration Date** displays the date of expiration as specified in NDOT's **Contractors Details** catalog of the library.

2. To update the date of expiration, select the **Certificate of Eligibility Expiration Date**. The **Submitted By** and **Submitted On** fields are automatically displayed after the form is submitted.

   The **Submitted By** field displays the first name and last name of the user who performs the **Submit** workflow action.

   The **Submitted On** field displays the date and time when the user performs the **Submit** workflow action.

3. In the **Remarks** field, enter any additional information.

4. Optionally, in the **ATTACHMENTS** section, attach or link related files. For additional information on attachments, refer to Attachments.

5. Click **Save**.

   The Certificate of Eligibility is updated.

6. To submit the **CERTIFICATE OF ELIGIBILITY**, perform the following steps:

   a. In the **CERTIFICATE OF ELIGIBILITY** page, click **Submit**.

      The Masterworks dialog box is displayed.

   b. In the Masterworks dialog box, click **OK**.

      The **CONTRACTOR BIDDING LIST** page is displayed, and the workflow stage of the **CONTRACTOR BIDDING LIST** is set to **Submitted**.

   To obtain business decisions from the various stakeholders, transition the record through the defined workflow.

### 1.1.1. Certificate of Eligibility Workflow Stages

| Phase | Current Workflow Status | Stakeholders | Action | Subsequent Workflow Status | Comments |
|---|---|---|---|---|---|
| 1 | Draft | Bidder | Submit | Submitted | The submitted information is updated in NDOT's **Contractors Details** catalog in the library for the associated company.<br><br>You cannot edit the form in the **Submitted** workflow stage. |
| 2 | Submitted | Bidder | Re-Draft | Draft | - |

## 1.1.2. Uploading Post Bid Opening Attachments

**Before You Begin:**

- The bid is in the **Submitted** workflow stage.
- The **Bid Opening date and Time** of the project is elapsed, and the countdown is started.

**Overview:**

The **Post Bid Opening Attachment Form** enables you to upload attachments post the bid-opening date and time within the stipulated window.

**Steps:**

1. In the **CONTRACTOR BIDDING LIST** page, select the appropriate record, and in the **OTHERS** toolbar, click **Post Bid Opening Attachment form** .

   The **POST BID OPENING ATTACHMENT FORM** page is displayed.

   The **Two Hours Submission Countdown** displays the 2-hour countdown after the bid-opening, by which the details of the subcontractors or suppliers can be updated.

   The **Next Business Day Submission Countdown** displays the countdown from the **Bid Opening date and Time** until 5 PM of the next business day within which the post-bid-opening documents must be submitted.

   The list of post-bid-opening documents to be submitted is displayed.

2. In the **Remarks** field, enter any additional information.

3. In the **ATTACHMENTS** section, attach or link the related files.

   For additional information on attachments, refer to Attachments.

4. To submit the **POST BID OPENING ATTACHMENT FORM** record, in the **WORKFLOW** group, click **Submit.**

   The Masterworks dialog box is displayed.

5. In the Masterworks dialog box, click **OK.**

   The workflow stage of the **POST BID OPENING ATTACHMENT FORM** record is set to **Submitted.**

   To obtain business decisions from the various stakeholders, transition the record through the defined workflow.

### 1.1.3. Post Bid Opening Attachment Form Workflow Stages

| Phase | Current Workflow Status | Stakeholders | Action | Subsequent Workflow Status | Comments |
|---|---|---|---|---|---|
| 1 | Draft | Bidder | Submit | Submitted | You can edit the form only post the bid-opening date and time until 5 PM of the next business day. |
| 2 | Submitted | Bidder | Re-Draft | Draft | You cannot edit the form post the closure window. |

# 2. Appendix

## 2.1. Attachments

You can upload attachments during workflow transition. There is no limitation on the number of attachments or the size of attachments that you can upload in a form or during workflow transition.

Refer to the following topics to upload or link, and access attachments:

- Attaching Files to a Form
- Accessing Attachments

You can download, annotate, and update attachments.

## 2.2. Attaching a File to a Form

You can upload files to a form or during a workflow transition. You can also link a file in the **Documents** folders to a form or during a workflow transition.

- To upload files, perform the following steps in the **ATTACHMENTS** section:
  1. Click **Upload Document**.

     The **Choose File to Upload** dialog box is displayed.
  2. To upload a single file, click the required file.

     Alternatively, to upload multiple files, press CTRL, and then click the required files.
  3. Click **Open**.

     The files are uploaded to the form, and are displayed in the **ATTACHMENTS** section.
  4. In the **Title** column, enter the titles for the files attached.
- To link a file available in the **Documents** folders, perform the following steps:
  1. In the **ATTACHMENTS** section, click **Link Document**.

     The **Link Document** dialog box is displayed.
  2. Click **Masterworks Document**.
  3. In the **Folder** drop-down list, select the required folder where the files exist.

     The list of files in that folder are displayed.
  4. Perform either of the following steps:
     - From the list of files, select the required files.
     - To search for a file, in the box enter any search criteria for the file, click **Search**, and then select the required files.

       You can specify search criteria such as the extension of the file type of the file, the date or time the file was uploaded, the name or title of the file, or the username of the user who uploaded the file.

       Optionally, to view all the files in the selected folder, click **Clear Search**.
  5. Click **OK**.

     The files are linked to the form, and are displayed in the attachment grid.

     > **NOTE:** The Url/Link column displays the path to the folder where is the document is available. Click the folder path to open the folder
  6. In the **Title** column, enter the titles for the linked files.
- To upload a file to a folder in the **Documents** folder structure and then link the file, perform the following steps:
  1. In the **ATTACHMENTS** section, click **Link Document**.

     The **Link Document** dialog box is displayed.
  2. Click **Upload and Link New Document**.
  3. In the **Folder** drop-down list, select the appropriate folder to upload files.

4. Click **OK**.

   A confirmation message is displayed.

5. Click **OK**.

   The **NEW DOCUMENT** page is displayed.

6. Upload the appropriate files. For information on uploading files, refer to Uploading Documents.

   On uploading and saving the files, the files are uploaded in the folder selected in the **Folder** drop-down list and are linked to the form.

7. In the **Title** column, enter the titles for the linked files.

- To link a file in an external storage system, perform the following steps:
  1. In the **ATTACHMENTS** section, click **Link Document**.
  2. Click **External Document**.
  3. In the **URL/Link** box, enter the URL to the file in external storage system.
  4. In the **Title** box, enter the title for the linked file.
  5. Click **OK**.

     The file is linked to the form, and is displayed in the **ATTACHMENTS** section.

## 2.3. Accessing Attached Files

You can access files that are attached to forms and workflows.

- To access files attached to a form:
  1. In the navigation pane, click the required form.

     The form list page is displayed.

  2. In the tool bar, click **More**, and then click **Attachments**.

     The attachments of all the forms are listed.

     Alternatively, to view files attached to a record, select the appropriate record, and then click **Attachments**.

- To access files attached to a workflow:
  - You can access files attached to a workflow from the **Workflow History** dialog box.
- To download an attachment, click the required document, and then click .

## 2.4. Deleting Attached Files

**Before You Begin:**

- You can delete a file only if you have attached it.

**Overview:**
You can delete files that are attached to forms and workflows.

**Steps:**

1. To access the required file, perform either of the following steps:
   - Files attached to a form:
     a. In the navigation pane, click the required form.
        The form list page is displayed.
     b. In the tool bar, in the **Others** group, click **Attachments**.
        The attachments of all the forms are listed.
   - Files attached to a workflow:
     a. You can access files attached to a workflow from the Workflow History dialog box.
2. To delete an attachment, click the required document, and then click .