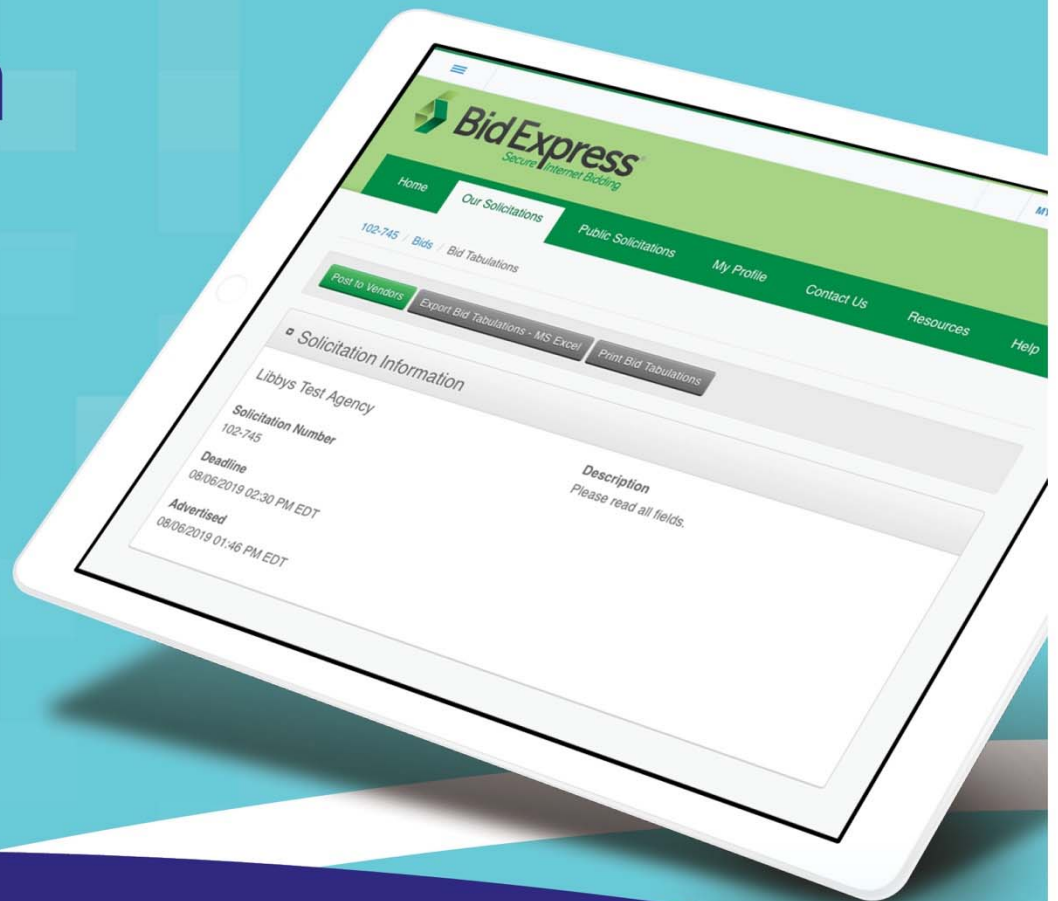


infotech



Bid Express[®]

Owner–agency Registration and Training Guides

August 2020

2970 SW 50th Terrace, Gainesville, FL 32608

www.infotechinc.com



Address: 2970 SW 50th Terrace, Gainesville, Florida 32608-5076

Web: www.infotechinc.com

Customer support is available by phone or email Monday through Friday from 7:00 A.M. - 8:00 P.M. Eastern Time, excluding legal holidays and when posted.

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Bid Express Owner-agency Guide

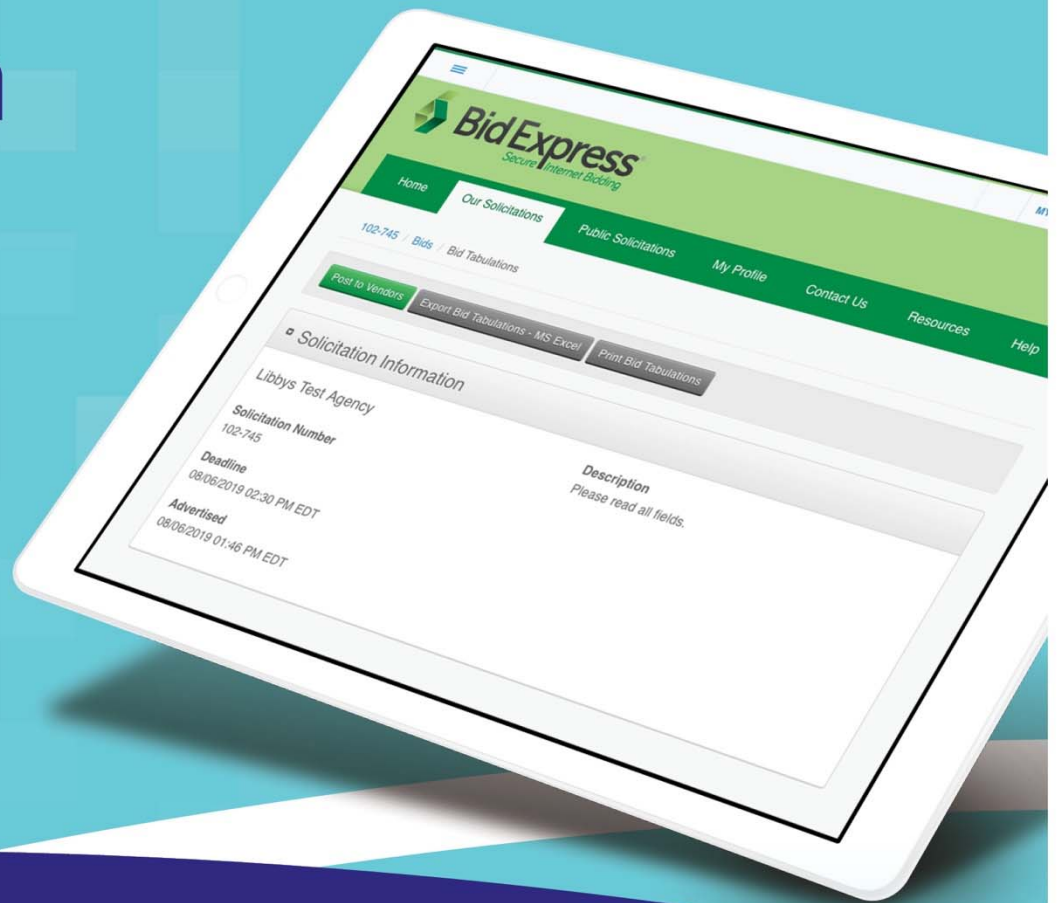
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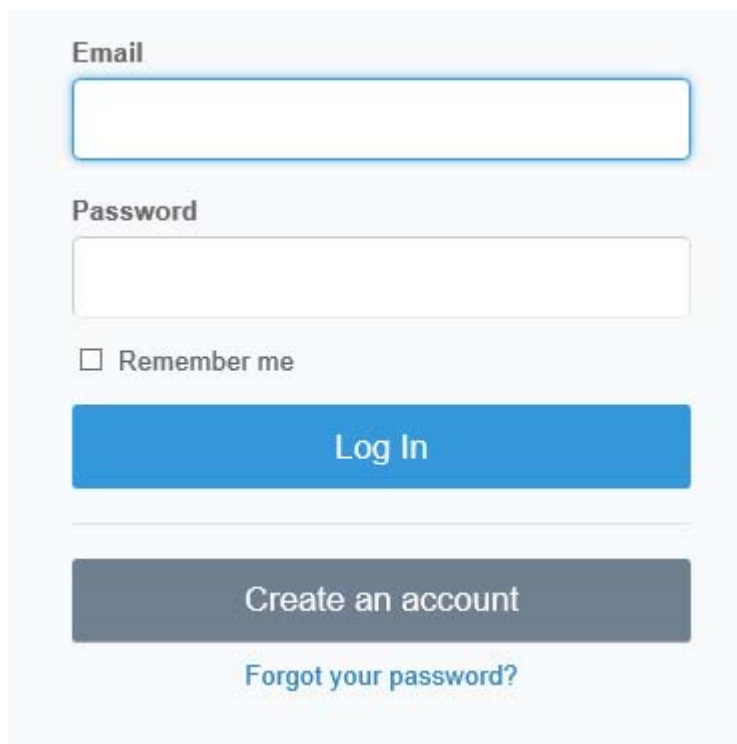
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1. Bid Express Registration and Setup

Welcome to the Bid Express® service. This document is for owner–agency managers and users who have already been established and received the email containing the registration link from the Bid Express customer support team.

If you have any questions about the manager or user roles or the registration email, please contact customer support at 888–352–BIDX (2439) and select option 3.



The image shows a login form on a light blue background. At the top, the word "Email" is written in bold. Below it is a white rectangular input field with a blue border. Underneath the email field, the word "Password" is written in bold, followed by another white rectangular input field with a grey border. Below the password field is a checkbox with the text "Remember me" to its right. A solid blue button with the text "Log In" in white is positioned below the checkbox. A horizontal line separates the login section from the registration section. Below the line is a dark grey button with the text "Create an account" in white. At the bottom of the form is a blue link that says "Forgot your password?".

Figure 1–1. Login Page

1.1 System Requirements

If you are using Digital IDs for the Bid Express service:

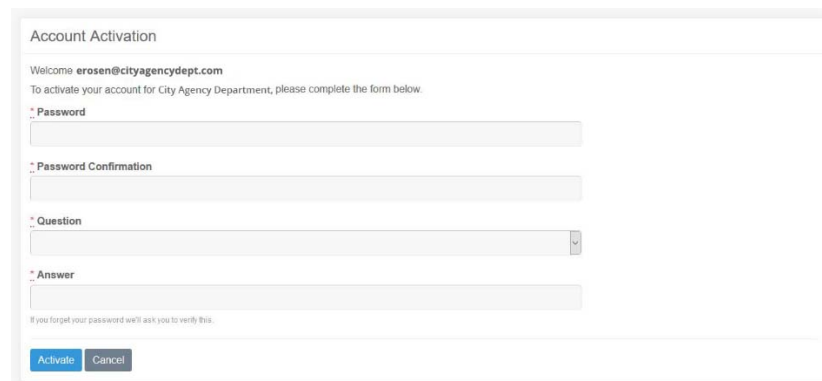
- You must use a 32-bit version of Internet Explorer® 10 or 11.
- ActiveX functionality should not be disabled in your browser settings.

There are no requirements for using electronic signatures.

1.2 Manager Account Activation

Use this method if you are the first person from your business to create an account. For instructions on registering if you were sent an invitation email from an employee of your business, please see the User Account Activation section.

If you are the first person from your business to create an account, open the email sent to you by the support team. Click the [Create Account](#) link in the email to activate your account. The link opens the Account Activation page.



The screenshot shows a web form titled "Account Activation". At the top, it says "Welcome: erosen@cityagencydept.com" and "To activate your account for City Agency Department, please complete the form below." The form contains four required fields: "Password", "Password Confirmation", "Question", and "Answer". Each field has a small asterisk icon to its left. Below the "Question" field, there is a small note: "If you forget your password we'll ask you to verify this." At the bottom of the form, there are two buttons: "Activate" (in blue) and "Cancel" (in grey).

Figure 1-2. Agency Account Activation

If you need help, please contact customer support at support@bidexpress.com.

[Enter](#) a password in the Password field. The password must be at least eight characters and include one uppercase letter, one lowercase letter, one number, and one symbol.

[Re-enter](#) the password in the Password Confirmation field.

Select a security question from the Question list.

Answer the security question in the Answer field. This answer is case-sensitive.

Click ACTIVATE.

[The](#) service automatically assigned you to the manager role. This allows you to invite other employees to use the account and assign them access roles, such as manager or user. You may have a separate role assigned for the service to which you have subscribed.

The service returns you to the home page and you can begin your work. The Bid Express service will prompt you to install the Infotech Sign Tool utility and to create an Infotech Digital ID (please see Infotech Digital ID Page). These are needed unless your agency is planning on solely using electronic signatures for bid submission.

To invite other employees or to continue setting up your business information, or to install the Sign Tool utility or create a Digital ID, select the Global Navigation menu (represented by the three lines in the upper left corner) and select **My Account**.

2. User Account Activation

If you were sent an invitation to open an account, you will be assigned the role of user. Your role can be adjusted by the manager. You may have a separate role assigned for the service to which you have subscribed.

When a manager invites you to join the organization, you will receive an email with a link to create an account. Click the link. The Account Activation page opens.

The screenshot shows a web form titled "Account Activation". At the top, it says "Welcome gsummers@cityagency.com, To enroll as a member of City Agency, please complete the form below." The form contains several required fields, each marked with an asterisk:

- * First Name:** A text input field containing "Gretl".
- * Last Name:** A text input field containing "Summers".
- * Password:** A password input field with masked characters (dots).
- * Password Confirmation:** A password input field with masked characters (dots).
- * Question:** A dropdown menu with a blue highlight and a downward arrow.
- * Answer:** A text input field.

Below the form, there is a small note: "If you forget your password we'll ask you to verify this." and a checkbox labeled "I have read and agreed to [Privacy Policy](#), [Terms of Use](#), and [DMCA Policy](#)."

Figure 2-1. User Account Activation Page

Complete the fields on the registration form. All fields are required. If you have any issues creating your account, please contact customer support.

1. Enter your first name in the First name field.
2. Enter your last name in the Last name field.
3. Enter a password in the Password field. The password must be at least eight characters and contain one uppercase letter, one lowercase letter, one symbol, and one number.
4. Re-enter the password in the Password Confirmation field.
5. Select a security question from the Question drop down list. This question is used to verify your identity in case you forget your password.
6. Enter the answer to your security question. This answer is case sensitive.
7. Read the Privacy Policy, Terms of Use, and DMCA Policy, then select the check box indicating you have read them.
8. Click **ACTIVATE**.

The service brings you to the My Account page where you can see your user information and other employees of your business. See the My Account Page chapter for more information.

If you wish to go to the service to which you have been subscribed, click the Global Navigation menu (represented by the three lines) in the upper left corner and select your service.

3. My Account Page

The My Account page allows you to update your account information, including your address and phone number, plus see the contact information and roles of other employees of your business and the status of their Infotech Digital IDs.

You can also update your e-mail, password, time zone, and challenge question.

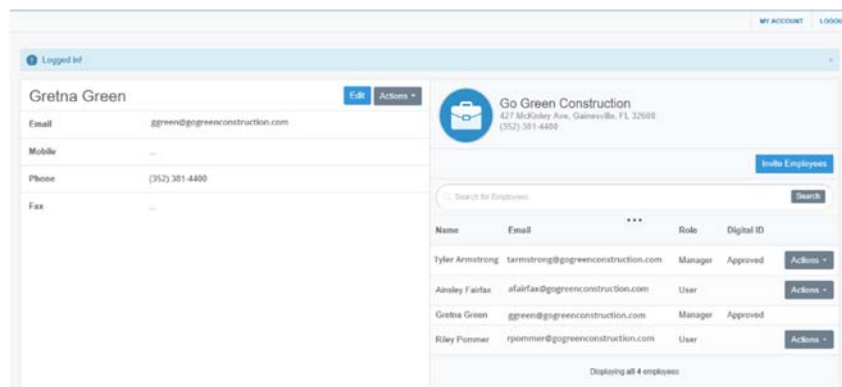


Figure 3-1. My Account Page – Manager

If you are a manager, you can also upload a business logo and invite employees to join your business.

3.1 Employees

The Employees section of the My Account page lists all the employees of the organization, their contact information, and their assigned roles.

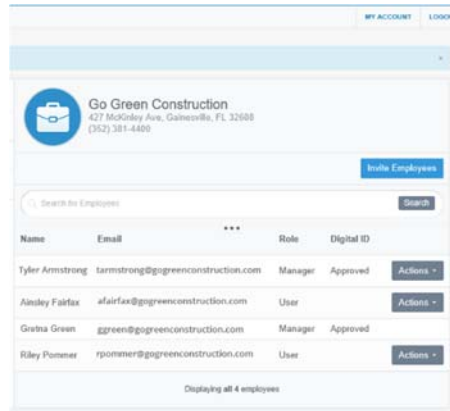


Figure 3–2. My Account Page With Employees

If you are a manager, you have the ability to invite other employees to join your business through the My Account page. If you are within a service, select the Global Navigation menu (represented by the three lines in the upper left corner) and select **My Account**.

Some services require the use of Infotech Digital IDs. Once employees start the process of registering for IDs, the status of their IDs displays next to their names in the Digital ID column.

An Action button display for all employees on the My Account page:

Change Role Allows you to change roles for an employee to User or Manager. You cannot change your own role.

Remove Removes the employee from accessing the service as part of your business. The employee’s account will be disabled.

3.1.1 Employee Search

To quickly search for an employee, enter the employee’s name or email address in the Search for Employees field and click SEARCH. Click the three dots under the Search field to expand the search criteria.

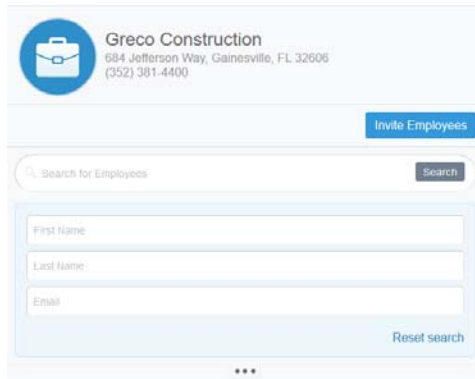


Figure 3–3. Employee Search


Clear the search by clicking the X in the field or click Reset search.

3.1.2 Invite Employees

To invite employees to join your business, click INVITE EMPLOYEES. Enter the email addresses of the employees you want to invite. Once all addresses have been entered, click INVITE EMPLOYEES.

If you see a message stating an email address already has an account, please contact customer support for help in adding the account to your business.

The service sends an email invitation to the email addresses entered and lists the employees above the employee list on the My Account page.

 **Note:** Instructions for registering for an account via an email invitation are in the User Account Activation section.

You can rescind an invitation by clicking Remove for an employee.

You will receive an email once an invitation has been accepted and when the employee completes the account registration.

3.1.3 Employee Roles

Employees are always assigned the role of user, but a manager can change that role. Managers cannot change their own roles.

The roles set here are not part of the individual services. Please search the online help for each service for information on roles.

Those assigned a manager role can:

- Invite other employees to join your organization, change their roles, and remove employees from your organization.
- Upload a business logo.
- Change the business name and contact information.
- Give customer support permission to merge an existing account into your business.

3.2 Change Your Contact Information

All users can change their first name, last name, and phone number. If you are the manager, you can also change the business name and contact information.

If you currently have an Infotech Digital ID and you update your first name, last name, or business name, you will be required to create a new ID. If there are additional employees as a part of your business and you change the business name, they will also need to create new IDs. Your updated names will not display on the Infotech Digital ID page because the ID is registered to your old names.

1. While on the My Account page, click EDIT in the header with your name. The service opens your account information.
2. Change the information and click UPDATE. Any field marked with an asterisk is required.

Figure 3–4. My Account Updates

The Infotech service updates your information and returns you to the My Account page.

3.3 Change Your Email Address, Password, or Security Information

You can change your email address, security challenge question, or password from the Actions menu. You will have to enter your password for each change you make to verify your account.

3.3.1 Change Password

Your password must be at least eight characters and include one uppercase letter, one lowercase letter, one number, and one symbol.

Figure 3–5. Change Password Window

1. While on the My Account page, click ACTIONS in the header with your name.
2. Select Change Password.
3. Enter your new password in the New Password field.
4. Re-enter your new password in the New Password Confirmation field.
5. Enter your current password in the Current Password field.
6. Click SAVE.

The service updates your password information and returns you to the My Account page.

3.3.2 Email Address

When you update your email address, you will receive a security code to the email address currently on file to authorization the change.

1. While on the My Account page, click ACTIONS in the header with your name.
2. Select **Change Email**.
3. Read the information in the Verify Email Address window and click OK. The service will send a security code to the email address on file.

4. Enter your new email address in the New Email and Email Confirmation fields.
5. Enter your account password in the Password field.
6. Enter the security code sent to your email address in the Security Code field.
7. Log in to your new email account. Open the email sent to you by the service and click the confirmation link to verify your new email address.
8. Answer the security question and click CONFIRM.

The service returns you to the My Account page. Remember to use your new email address the next time you log in to the service.

3.3.3 Security Question

You can also update your security question.

1. While on the My Account page, click ACTIONS in the header with your name.
2. Select **Change Security Challenge Question**.
3. Select a question and enter an answer.
4. Enter your password and click SAVE.

3.4 Update Business Logo

If you are the manager, you can load a company logo onto the My Account page. This logo will be seen by all your employees.

1. While on the My Account page, click the circle next to your company name and address.

2. Navigate to and select the picture file of your logo.
3. Click OPEN.

The service uploads the picture. This may take a moment, depending on the size of the file.

The picture also displays on your public home page in the Bid Express service (see Section 5.3).

4. Infotech Digital ID Page

An Infotech Digital ID is an electronic tool that allows users to digitally sign documents, such as bids or contracts, submitted via an Infotech service. Digital IDs are used as part of a secure method of maintaining confidentiality and identity verification.

Depending on the agency, you may be required to have a Digital ID created and approved before using any feature that requires a digital signature, such as posting a letting solicitation or signing a contract document.

If a Digital ID is not required, the service may require an electronic signature. There is no registration process for an electronic signature.

In most cases, if you use a Digital ID, you will also need the Infotech Express Sign Tool. The service will indicate if it needs a Digital ID or the Sign Tool. If you are not sure, please call customer support at 888 352-2439.

If you currently have an Infotech Digital ID and you update your first name, last name, or business name, you will be required to create a new ID. Other employees from your business who have Digital IDs will also need to create new IDs if you change the business name.

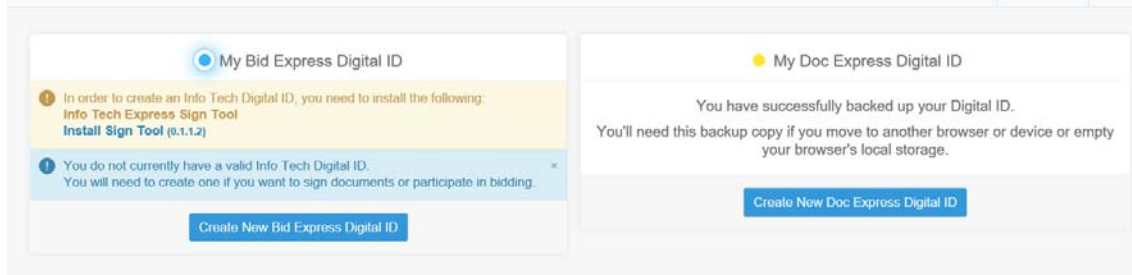


Figure 4-1. Digital ID Page With the Bid Express and Doc Express Services

4.1 Infotech Express Sign Tool

If the Infotech Express Sign Tool utility is necessary for your chosen services, you will see an informational message within the service if it is not yet installed.

Your computer will need to be rebooted in order for the Sign Tool utility to finish the installation.

Click [Install Sign Tool](#) within the service. Read the instructions, then click DOWNLOAD.

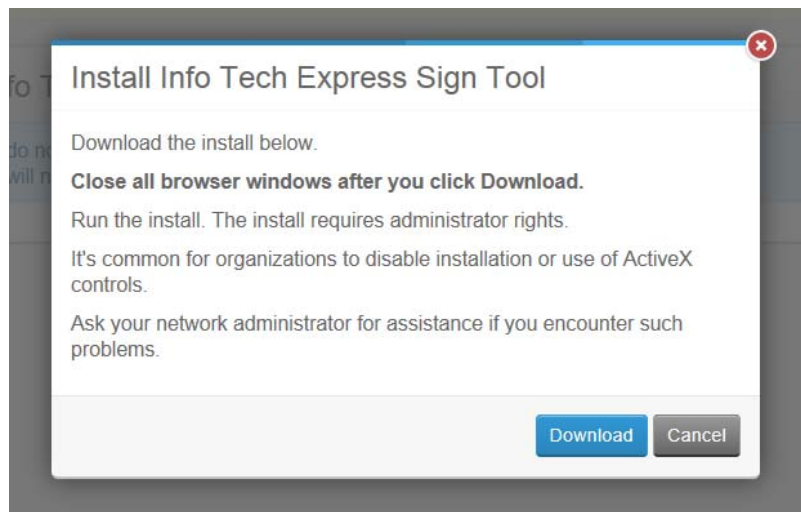


Figure 4-2. Infotech Sign Tool Instructions

Follow the instructions to install the Sign Tool utility.

4.2 Infotech Digital ID

If you are using a service that requires an Infotech Digital ID, the service will prompt you to create one. Some services require you create the Digital ID within the service. With others, you can create the ID from the Digital ID tab in the My Account pages.

1. Click the Digital ID link in the software or select Digital ID from the side menu of the My Account pages.

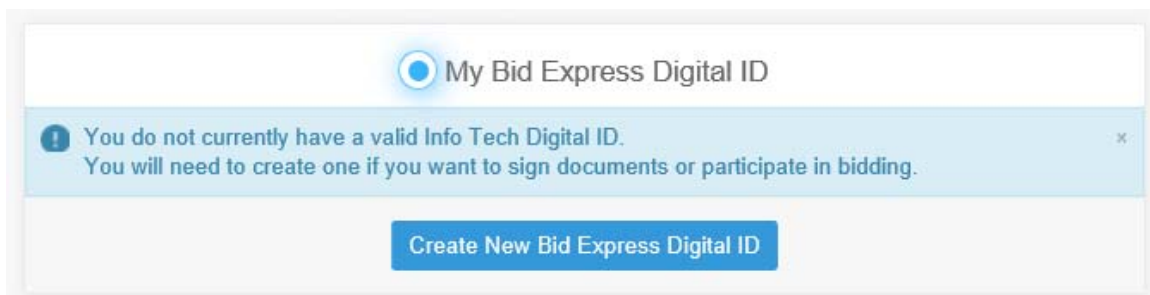


Figure 4-3. Digital ID Notice

2. Follow the instructions in the service or click CREATE.
3. Review your business information. If it is incorrect, click CANCEL and correct your information and try again. If it is correct, click SUBMIT. The service receives the public key of your Digital ID and displays its thumbprint. A thumbprint is an alphanumeric representation of your ID but cannot be used to get your ID.

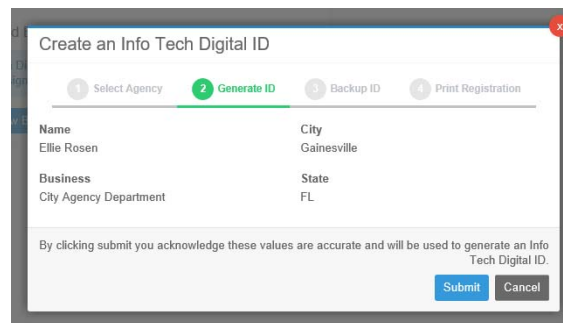



Figure 4-4. Review Business Information

4. Click **BACKUP** to create a backup of the private key of your Digital ID to an external media, such as a flash drive. The service does not keep a copy of your private key. If you switch computers or you experience data loss, you will not be able to use the service with your Digital ID unless you have a backup to import into the new computer.
5. Enter a password for your backup Digital ID. It does not need to be the same as your account password. Do not forget your password. There is no way for the service to retrieve or reset this password.
6. Enter the password again in the **Verify Password** field.
7. Click **OK**. The **Save As** window opens so you can back up your ID.
 -  **Note:** When you back up your Digital ID, it is a good idea to save it to an external media in case something happens to your computer. If you wish to back up your ID to a CD, you must first save it to your computer and then burn it to a CD.
8. Navigate to the location of the media where you want your backup ID saved.
9. Enter the file name for your backup ID in the **File name** field or use the default name.
10. Click **SAVE**. The ID is saved and the Bid Express service returns you to the Digital ID Generation window.
11. Click **NEXT**.
12. Click **PRINT** and print the Digital ID Notary Form. Verify the information is correct.

Info Tech Digital ID Registration 87

NOTICE: YOU WILL NOT BE ABLE TO SUBMIT ELECTRONIC BIDS THROUGH THE BID EXPRESS SERVICE UNTIL UP TO 48 HOURS AFTER YOUR DIGITAL ID HAS BEEN APPROVED AND ACTIVATED. SUBMIT THIS REGISTRATION AT LEAST SEVEN DAYS BEFORE THE DATE ON WHICH THE DIGITAL ID MUST BE USED.

1. **SIGN** this registration **IN THE PRESENCE OF A NOTARY PUBLIC** and have the registration **NOTARIZED**.
2. **SEND THE ORIGINAL NOTARIZED FORM** to attn.: Digital ID Activation at the Info Tech corporate headquarters: *Info Tech, Inc., 5700 SW 34th Street, Suite 1235, Gainesville, FL 32608*
3. **CHECK YOUR REGISTRATION STATUS:**
 - check your email for notices about acceptance status.
 - log in to the Bid Express service and access your Digital ID information from the "My Account" page.

Fingerprint: 40F4E8DB647BEE8DFFC12432AE7A53B177B9D23C

I, Ellie Rosen, an employee of City Agency Department, am the creator of the Info Tech Digital ID identified in the barcode below. I shall remain in sole control of this Info Tech Digital ID, and any signatures created with this Digital ID shall be evidence of my intent to be legally bound by the signature.



Signature:

Figure 4-5. Print Digital ID Registration Form

13. Close the Print window and click FINISH to return to the Digital ID page.

You will receive an email with more information on what to do. Get the form notarized, then mail it to the address on the form. Once your Digital ID has been generated and the paperwork mailed, it needs to be approved by Infotech administration. You will receive another email when your Digital ID is approved. Your Digital ID status will also be displayed next to your name in the Employees section of the My Account page.

5. Bid Express My Profile Tab

The MY PROFILE tab contains your Bid Express information, the toggle for Q & A notifications, and a list of other users from your company. Only managers can change the roles of the users, though you cannot change your own role. It is recommended that every business have at least two managers.

If there are options on this page that you do not see, you most likely do not have the correct role to see them.

Name	Email	Role
Gordon Smith	gordon.smith@stateagency.com	Contract Editor
Greta Vonsushell	greta.vonsushell@stateagency.com	Manager
Sam Gradis	sam.gradis@stateagency.com	Executive Manager
Simmy Gwidon	simmy.gwidon@stateagency.com	Contract Administrator
Zack Revere	zack.revere@stateagency.com	Q & A Reviewer

Figure 5-1. My Profile Tab

If you are sponsoring accounts for your contractors, the expiration date of the sponsorship displays at the end of the Business Information section.

5.1 Q & A Notifications

The Q & A component in a solicitation allows vendors to ask questions when the solicitation is advertised. Notification emails are sent to agency users when a vendor asks a question. You can opt out of receiving these emails for your agency's solicitations.

- To stop receiving notification emails, click the Yes to change it to No.
- Click the No to change it to Yes to receive the notification emails.

You can turn on notifications for specific solicitations when the solicitation details are open (see the Q & A section in the *Bid Express Owner–agency Trainer's Guide*).

5.2 Toggle Restricted

If your solicitations are set to restricted bidders, you must invite vendors to bid on the solicitation through the Invited Vendors table. You will see this table when you create a new solicitation.

To restrict the bidders for all solicitations, click TOGGLE RESTRICTED. You can change the restriction when you create a solicitation.

5.3 Home Page

Your Public home page is what vendors or other owner–agencies see if you provide them with the web address or when they click on your business name anywhere within the Bid Express service. This includes your agency description, contact information, standard documents, and upcoming or closed solicitations. Contractors that are logged in may click any upcoming solicitation to view your plan holders list, if you

make this visible to your vendors. They may also click any closed solicitation to view apparent bids or report postings.

If you have the correct permission, you can also post a cover image and description for your owner–agency and standard documents and files. Vendors that are logged in can view and download these documents.

Click a solicitation in the Number column in the Upcoming Solicitations section to see the details of the solicitation.

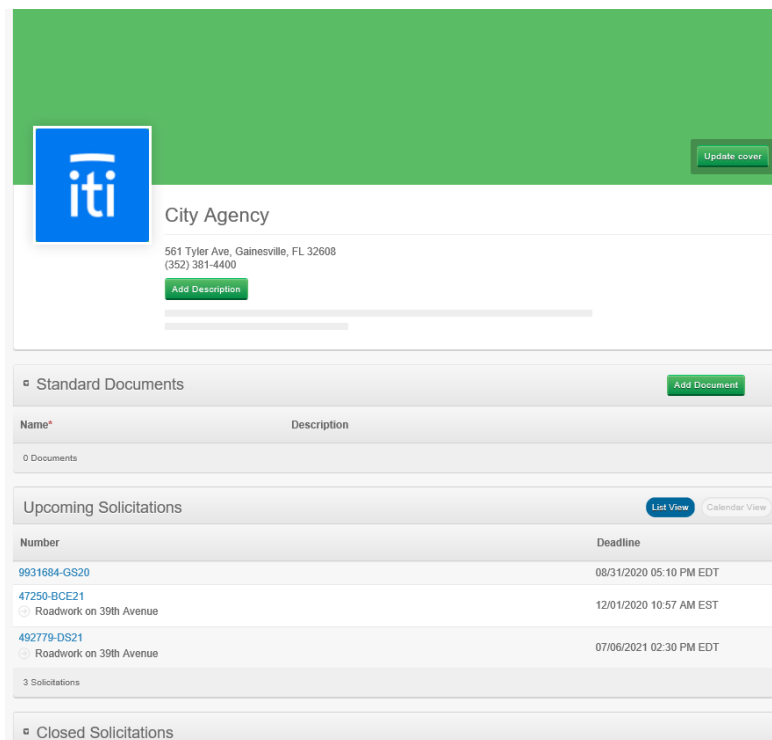


Figure 5–2. Public Home Page

5.3.1 Cover Image and Description

The logo uploaded on the My Accounts page displays on your home page. If you have the correct permission, you can also post a cover image of your owner–agency.

Picture files must be:

- In JPG, JPEG, PNG, or GIF format
- No larger than 1170 x 350 pixels

- No larger than 10 mb
1. If you are not already there, select [Public Home Page](#) on the MY PROFILE tab.
 2. Click UPDATE COVER.
 3. Navigate to and select the file of your cover.
 4. Click OPEN.

Depending on the size of the file, it may take a moment to upload. Delete the cover by clicking REMOVE COVER and confirming the deletion.

You can also add or update the description of your owner–agency.

1. Click ADD DESCRIPTION or UPDATE DESCRIPTION. The Edit Description window opens.
2. Enter the owner–agency description.
3. Click ADD DESCRIPTION or UPDATE DESCRIPTION.

5.3.2 Agency Standard Documents

Your agency can post general documents or files for your agency by adding them to your Public home page through the MY PROFILE tab. Here they can be easily viewed by vendors.

1. If you are not already there, select [Public Home Page](#) on the MY PROFILE tab.
2. Click [Add Document](#) in the Standard Documents section.
3. Navigate to and select the document you wish to add.
4. Click OPEN.

The Bid Express service lists the document in the Standards Document list and makes it available for vendors to download. You can edit or delete these documents by selecting the appropriate button in the document list.

5.4 Add Downloaders to Plan Holders


Vendors have the ability of downloading attachments without selecting the solicitation for bidding. Use the **Add Downloaders** option on the MY PROFILE tab to add Bid Express vendors that download the attachments for a solicitation to the plan holders list. This is helpful when you want to send a notice to all plan holders and downloaders of a solicitation.

5.5 Users

You can assign specific roles to your users. Each role has its own security and available accessibility throughout the Bid Express site.

Roles that can fetch bids or responses for agencies that use Digital IDs must have a Digital ID prior to a solicitation or RFP being advertised.

1. Click the MY PROFILE tab if it is not already selected.
2. Use the drop-down list to select the appropriate role.

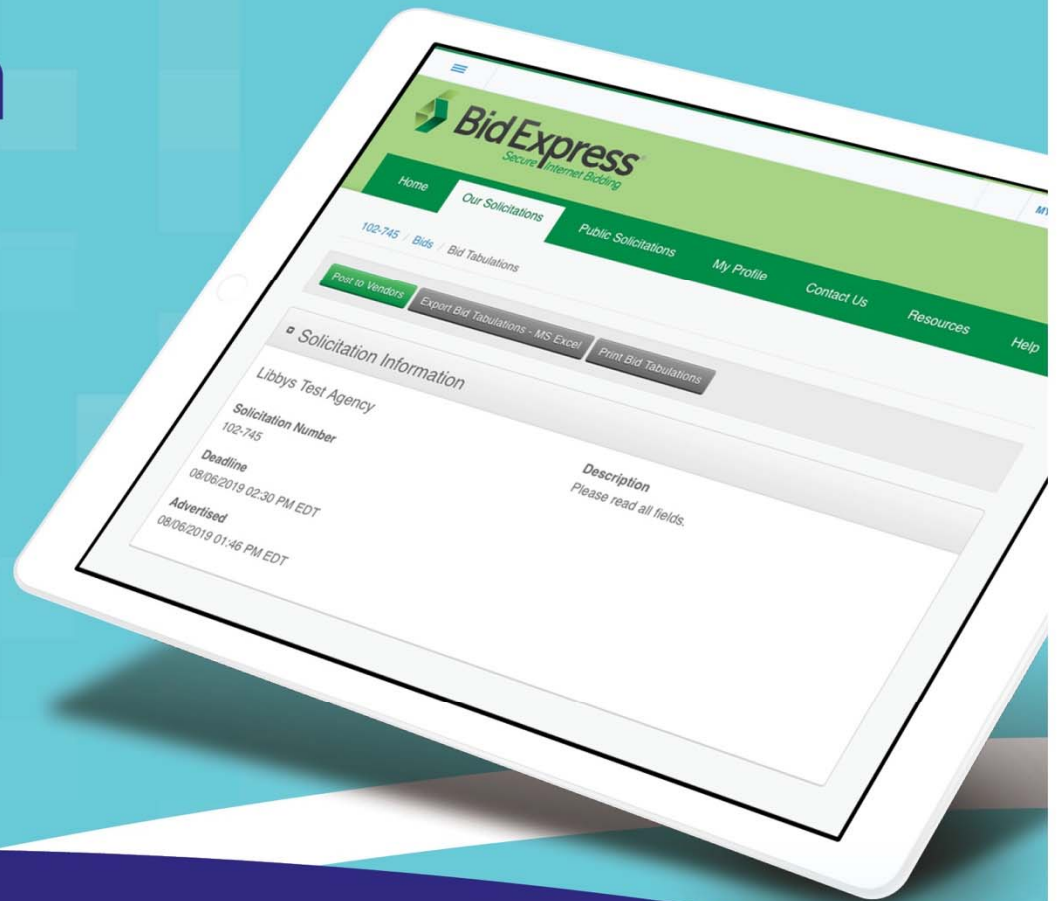
 **Note:** If you created the agency, you are automatically assigned the role of Manager. You cannot change your own role.

An owner-agency business manager can assign these roles:

Role	Abilities
Manager	Can assign roles, edit business information, create, edit, and delete draft solicitations, advertise a solicitation or request for proposal, receive Q & A notifications and answer Q & A questions, issue addenda, open bids or responses, view bid details, enter manual bids, post apparent bids, has access to all reporting (bid tabulation and other), and can archive solicitations. This role must have a Digital ID if the owner-agency requires Digital IDs. This role can access API functions.

Role	Abilities
Contract Administrator	Can create, edit, and delete draft solicitations, advertise a solicitation or request for proposal, receive Q & A notifications and answer Q & A questions, issue addenda, open bids or responses, view bid details, enter manual bids, post apparent bids, has access to all reporting (bid tabulation and other), and can archive solicitations. This role must have a Digital ID if the owner–agency requires Digital IDs. This role can access API functions.
Solicitation Manager	Can create, edit, and delete draft solicitations, advertise a solicitation or request for proposal, receive Q & A notifications and answer Q & A questions, issue addenda, view bid details, post apparent bids, has access to all reporting (bid tabulation and other), and can archive solicitations. This role must have a Digital ID if the owner–agency requires Digital IDs.
Contract Editor	Can create a solicitation or request for proposal, edit an existing solicitation, and receive Q & A notifications. This role does not need a Digital ID.
Executive Manager	Can navigate the service with read–only access but can’t modify or manage anything. Can download and view reports. This role does not need a Digital ID.
Evaluator	Must be issued an invitation to access request for proposals prior to the RFP being advertised. Has read–only access to the RFP before the deadline and can receive Q & A notifications for that RFP. After the RFP deadline, can score responses, and can fetch responses if they have an approved Digital ID prior to the RFP being advertised (for agencies that require a Digital ID).
Q & A Reviewer	Can navigate the service with read–only access but can’t modify or manage solicitations. Can download and view reports. Can receive Q & A notifications and compose and save Q & A answers, but not publish the answers. This role does not need a Digital ID.

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Bid Express[®] Owner-agency Administrator's Training Guide

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6. Introduction to the Owner–agency

This guide is for owner–agencies who are creating solicitations or requests for proposals for vendors.

Welcome to the Bid Express® service. Before using this guide, you should have already registered for an account and created an Infotech Digital ID and downloaded the Sign Tool, or contacted customer support about using electronic signatures. For help with these activities, please see the *Bid Express Registration Guide*.

Unless otherwise noted, the actions you take for a solicitation can also be taken for a request for proposal.

Any person who has joined your agency and wishes to advertise a solicitation must have a Digital ID unless you are using electronic signatures. You can create a solicitation before your ID is approved, but it cannot be advertised. Any evaluator that you want to be able to open responses to an RFP that requires a Digital ID must also have a Digital ID.

Using your Internet browser (if you will be requiring Digital IDs, Internet Explorer 9 or above is required), access the Bid Express website at www.bidexpress.com.

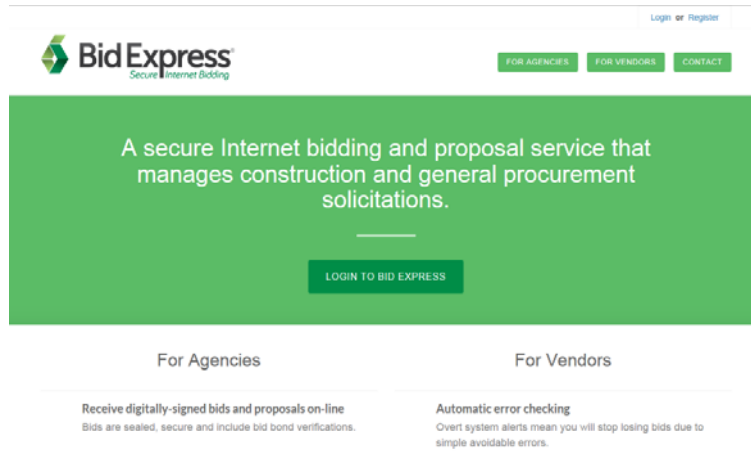


Figure 6-1. The Bid Express Login Page

6.1 Bid Express Home Page

Before you can use the Bid Express service, you must log in. After you successfully log in, the Bid Express service displays the Bid Express home page.

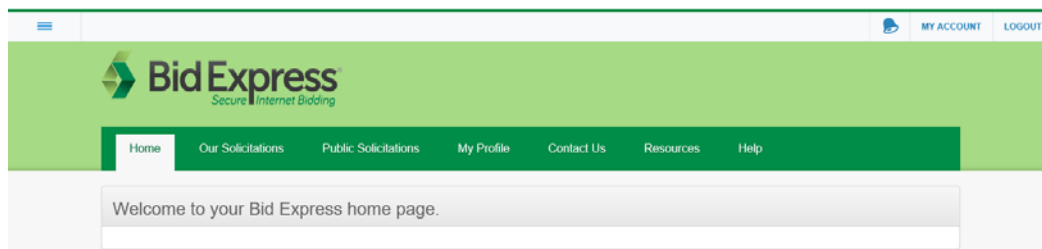


Figure 6-2. Agency Home Page

The three short lines in the upper left corner is the Global Navigation menu. Click this icon to access other services or your account information. You can also use this menu to log out of the Bid Express service.

6.2 Help

After logging in, click Help in the lower right corner to access help for the Bid Express service. Enter the topic you need help on and select the suggestion that fits your

need. Once you select a topic, you can click the arrow in the upper right of the list to access the entire help system.

When you are finished, return to the Bid Express service by selecting the tab in your browser.

6.3 Contact Us

The CONTACT US tab lists contact information for Bid Express customer support and bid bonding partners.

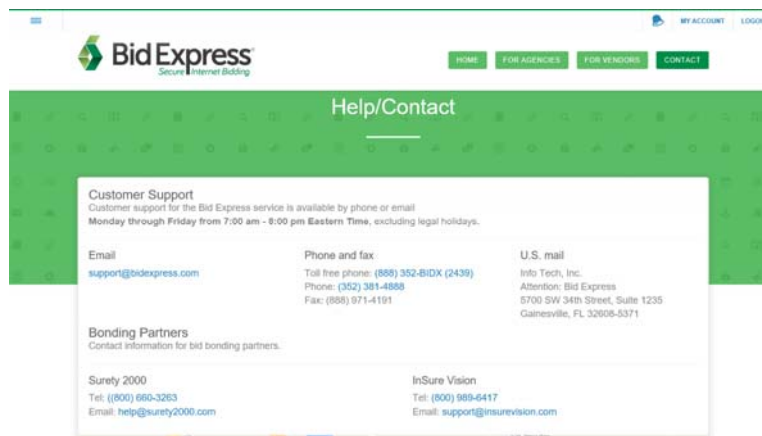


Figure 6–3. Help/Contact Page

6.4 Notices

You will receive a notice when the customer support team has information to share, such as holiday hours or an update on inclement weather.

When there is a new notice, a number displays in the bell icon at the top of the page. The notice is also shown in the software.

Red notices have a high priority. Yellow ones have a medium priority. Blue ones are low priority. Click the X to delete the notice from the page.

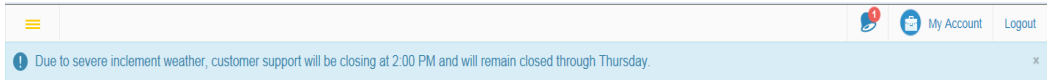


Figure 6–4. Notices

Click the Bell icon to open the Notices page.

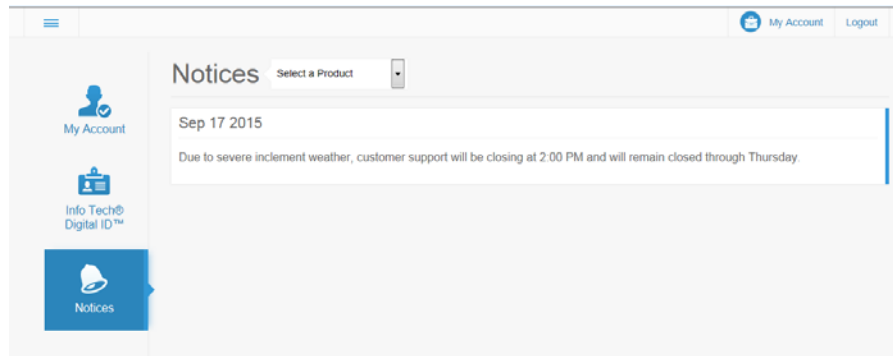


Figure 6–5. Notices Page

Use the product filter to see notices for a specific product.

When you are finished, return to your service through the Global Navigation menu.

7. Our Solicitations

The OUR SOLICITATIONS tab lists the solicitations created by your business. You can also create solicitations from templates (see Section 9.1.1) or new solicitations from this page. Unless otherwise noted, the actions you take for a solicitation can also be taken for a request for proposal.

7.1 Creating a Solicitation

A solicitation is your way of letting vendors know you have a project for bid or have a request for a proposal (RFP). Each solicitation or request created in the Bid Express service can contain items, bid bond information, specific documents, and other components.

If you wish for your solicitation to use electronic signatures or to accept multiple bids from a vendor, please contact Bid Express customer support at support@bidexpress.com.

Figure 7-1. New Solicitation

Note: Once a solicitation is advertised, you cannot change the option for electronic signatures, the allowance for vendors to ask questions, the restriction on the solicitation, or its RFP status.

1. Click CREATE SOLICITATION on the OUR SOLICITATIONS tab.
2. Enter the project number in the Number field of the General Info component.
3. Click in the Deadline field to select the date and time for the project deadline. The project must have a deadline in order to be advertised. You can also enter the date and time directly into the field.
4. Click OK in the calendar when the date and time are entered.
5. If you want the solicitation to be advertised automatically instead of manually, click in the Auto Advertise field and select a date and time. The solicitation can be scheduled for any hour or half hour.
6. Enter a description in the Description field.
7. Click **Solicitation Options** and select the appropriate options for your solicitation (see Section 7.1.1).
8. When all information has been entered, click SAVE.

Once the general information about your solicitation has been entered, you are ready to invite vendors for restricted solicitations or add the components.

7.1.1 Solicitation Options

To add an option to your solicitation, click the **No** toggle option to change it to Yes.

Allow zero values for unit prices and labor in item lists	Allows a vendor to input zero for unit prices and labor in item lists without receiving an error message.
Allow negative values for unit prices and labor in item lists	Allows a vendor to input negative values for unit prices and labor in item lists without receiving an error message.
Use electronic signatures?	Uses the vendor's electronic signature instead of a Digital ID to authorize bid submission.
Allow vendors to ask questions	Displays a Q & A section where vendors can ask questions. You can make questions public or answer them privately (see Section 7.2).
Restrict this solicitation to only those vendors who are invited	Allows only invited vendors to bid on a solicitation (see Section 7.3). Select the Publicly post check box to make the general information visible to all vendors and to enable the Public check box for each solicitation component.
Mark solicitation as an RFP	Sets the solicitation as a request for proposal with sections for scoring and setting up report evaluations (see Section 7.4).

7.2 Q & A

If you allow the vendor to ask questions, the Q & A component displays in your solicitation. From here, you can set a deadline for questions and enter any remarks you may have, such as if there will be a pre-bid conference.

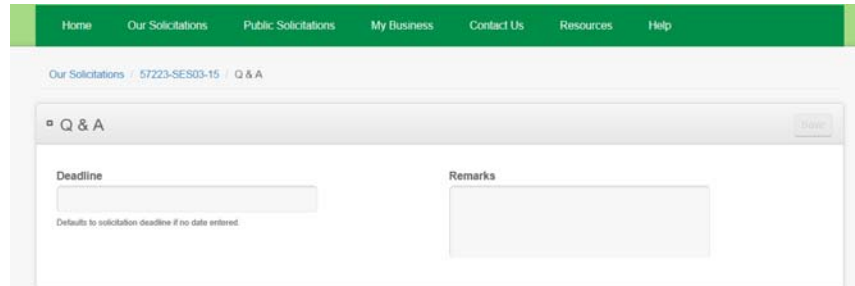


Figure 7-2. Q & A Component

7.2.1 Setting Up the Q & A Component

When you set up the Q & A component, you can enter a deadline for when there will be no more questions allowed. If you set a date, you will be able to change it after the solicitation is advertised. If you do not enter a date, the deadline for the vendor to ask questions will be set to the deadline for the solicitation, and you will not be able to change it after the solicitation is advertised. The Q & A deadline cannot extend beyond the solicitation deadline.

Note: If you change the solicitation deadline, you may have to also change the Q & A deadline.

1. Click **EDIT** for the Q & A component.
2. Click in the **Deadline** field to display the calendar. Select the date and time for the deadline for the vendor to ask questions. Click **OK**.
3. Enter any remarks you may have, such as an estimate of how long it will take to answer a question.
4. Click **SAVE**.

5. Select the solicitation in the navigation trail to return to the solicitation details page.

If you decide to add the Q & A component after the solicitation has been advertised, you will need to issue an addendum. If you change the deadline or remarks for the Q & A component after the solicitation is advertised, you can issue an addendum by selecting the Require Addendum check box. Otherwise, no addendum will be issued. Vendors will receive an email notification of a date change.

7.2.2 Answering Questions

Only the manager, contract administrator, and solicitation manager can answer questions and publish the answers. The Q & A reviewer can answer questions, but not publish them.

Open the solicitation to see the question. The Bid Express service displays the question, the vendor that submitted the question, and when the question was submitted.

A flag indicating the number of unanswered questions will display next to the solicitation status on the OUR SOLICITATIONS tab. If you turned on your notifications, you will receive an email when a vendor asks a question. You can turn the email notifications on and off in the banner at the top of the solicitation.

The Bid Express service will display a notice if no one from your agency is receiving email notification for the solicitation.

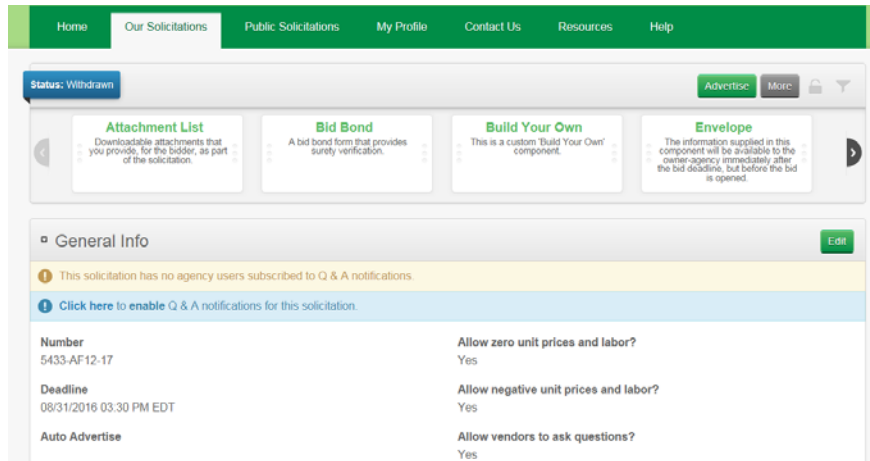


Figure 7–3. Notification Banners

Questions can have three statuses:

- New** Question has been asked by the vendor but not yet answered or published.
- In Progress** Question has been answered by the agency, but the answer is not yet published, or the published answer has been edited and not yet republished.
- Published** The question has been made public by the agency and can be seen by anyone. The question does not need to have an answer in order to be published.

Use the filter to see all the questions of the selected status.

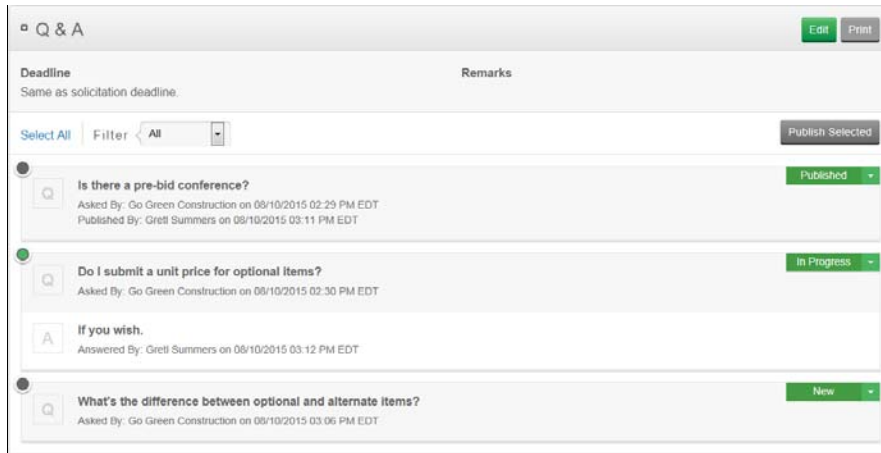


Figure 7-4. Question and Answer Statuses

Click the PRINT button to create a PDF file of all the questions and answers. Save the file, or open it to see the questions and answers. You can create the file at any time, including after the solicitation has closed.

Publish a Question

You do not have to answer a question in order to publish it. Select the circle on the upper left side for all the questions you want to make public or click Select All to choose all the questions. Click PUBLISH SELECTED. Click OK in the confirmation window.

The name of the user who published the message displays under the question but is not displayed publicly. The status of the question will change to Published for the vendor.

Answer a Question or Edit an Answer

To answer a question or edit an answer already given, click the down arrow next to the status and select **Answer** or **Edit**.



Figure 7-5. Answer Question Window

The Bid Express service displays an Answer Question or a Question window, depending on if the question has already been answered or made public.

The Question window displays the last answer entry and a history of the answer, including when it was published.

For either window, enter the answer in the Answer field.

To keep the answer private and visible only to members of your agency, or if you are the Q & A reviewer, click **SAVE**.

To make the answer public and visible to any vendor, click **PUBLISH**. Click **OK** in the confirmation window. Only the last answer will be published. Published answers for questions on a restricted solicitation will be visible only to those invited to bid.

Once an answer is made public, the Bid Express service sends an email to all members of the business that asked the question. In addition, the service sends an email to all vendors who signed up for Q & A notifications.

7.3 Restricted Solicitations

If your solicitations are set to restricted bidders, you must invite vendors to bid on the solicitation and decide whether you are going to allow vendors who are not being invited to see parts of the solicitation.

7.3.1 Publicly Post

When you create a restricted solicitation, select the Publicly post check box in the solicitation options to make the general information visible to all vendors and to enable the Public check box for each solicitation component (see Section 7.5.2).

7.3.2 Invited Vendors

When you have a restricted solicitation, you must invite vendors to bid through the Invited Vendors table. If your default setting is restricted, you will see this table when you create a new solicitation. If your default setting is not restricted, you will see this table after you select the Restricted solicitation option and save your information in the General Info section of your solicitation.

You can see vendors that have been added or removed from the solicitation in the solicitation history.

Once a restricted bid is advertised, only invited vendors will be able to see it. You can invite vendors at any time until the solicitation deadline, but you cannot remove any invited vendors after the bid is advertised. You cannot change an unrestricted bid to restricted after it has been advertised.

1. With your solicitation open, click INVITE VENDOR TO BID. The Bid Express service opens the Invite Vendor to Bid window.

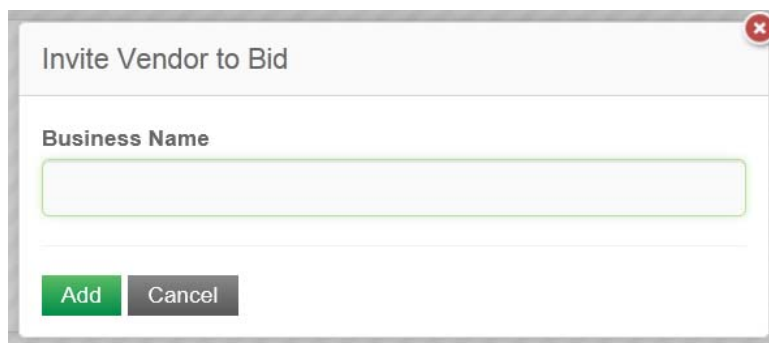


Figure 7-6. Invite Vendor to Bid

2. Enter the vendor's name in the Business Name field. The vendor must be a registered Bid Express subscriber. If you've already invited the vendor, the

business name will not appear in the list. If there are multiple businesses with the same vendor name and you do know which one is correct, please contact customer support.

3. Select the vendor and click ADD.

The Bid Express service adds the vendor to the Invited Vendors table. When the project is advertised, the vendor will get an email with the solicitation information.

You can remove a vendor by clicking the X for that vendor in the Invited Vendors table. If this was before the solicitation was advertised, click OK in the confirmation window. After the solicitation is advertised, the Withdraw Vendor Invitation window opens. Enter a reason for the invitation withdrawal and click WITHDRAW. The reason will be sent to the vendor.

7.4 Evaluation

If the solicitation is an RFP, you will see the Evaluation section of your solicitation. Here you will assign the evaluator for the contractors' responses, set a deadline as to when those evaluations are due, and define the scores. You can change a component's weight until the evaluation deadline has passed. You can change the score until an evaluator has entered a score. You cannot change the evaluation deadline once the deadline has passed.

You can create an evaluation template for use with future RFPs (see Section 9.2).

7.4.1 Deadline and Evaluator

Evaluators are used to score bids for the RFP. Most members of your business can be added as an evaluator, depending on their assigned user role. Those with the right permission to be evaluators are listed in the drop down menu of the Add Evaluator window. Evaluators have access solely to the request to which they have been added (unless they have another role assigned in the Bid Express service). The Bid Express service sends an email with a link to the RFP to any member assigned as an evaluator.

In order for evaluators to be able to fetch responses to the RFP, they must be added to the solicitation and have an active Digital ID, if required, before it is advertised .

The deadline forces the evaluators to finish scoring by the given date and time. You can change the deadline and the evaluators even after the solicitation has closed. If an evaluator has already entered a score and is removed from the solicitation, that score is deleted.

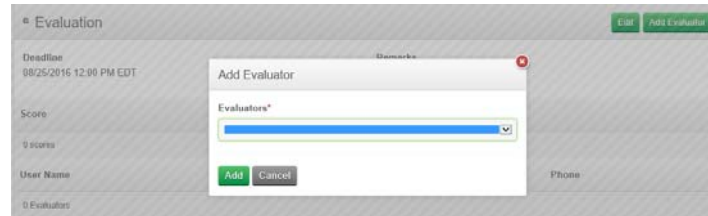


Figure 7-7. Add Evaluator Window

1. With your RFP open, click **Edit** in the Evaluation section.
2. Click in the Deadline field to select or change the deadline for the evaluation. This date must be past the request deadline.
3. Enter any remarks, if necessary.
4. Click SAVE.
5. Click add evaluator.
6. Select the evaluator from the drop down list and click ADD.

The Bid Express service adds the deadline and evaluators to the RFP.

You can delete an evaluator by clicking the X for that evaluator. Click OK in the delete confirmation window.

7.4.2 Define Score

You can define scoring information for your RFP evaluation. Once the solicitation closes, the evaluators use the scores to rank each portion of the RFP. You can change the scores until an evaluator has entered a score.

Figure 7–8. Evaluation Scoring

1. With your solicitation open, click **Edit** in the Evaluation section if it is not already opened.
2. If you are changing a score, click in the Score field and make the changes.
3. If you are adding a score, click ADD SCORE.
4. Enter the score in the Score field and what the score represents in the Description field.
5. Click ADD SCORE again to add new scores.
6. When you are finished, click SAVE.

The Bid Express service adds the scores to the evaluation in the RFP. When the solicitation closes, each applicable component will contain a space for scoring. You cannot change the scoring definition after the solicitation has closed.

You can delete a score by clicking the X for that score while the Evaluation section is being edited.

7.5 Components

Unless otherwise noted, the actions you take for a solicitation can also be taken for a request for proposal.

Components are the different parts you use to build your solicitation. You can add an Item List and required documents work to your solicitation. You can add bid bond information, attachments, or additional text. You can also build your own component to add lists or give information, among others. Build Your Own components include the ability for vendors to duplicate a group of fields. You can add more than one of all standard components.

For more information about all Bid Express components, please see the online help.

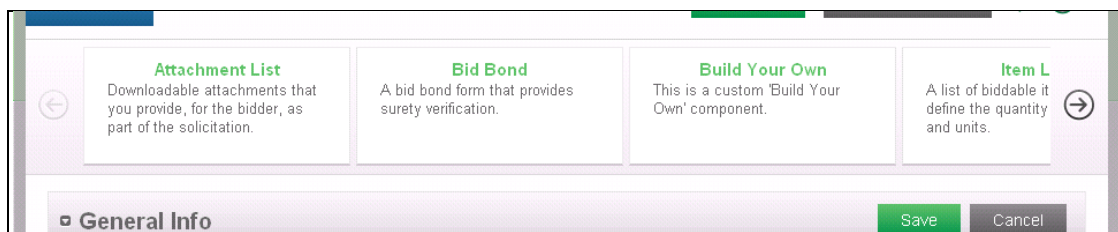


Figure 7-9. Components Slider

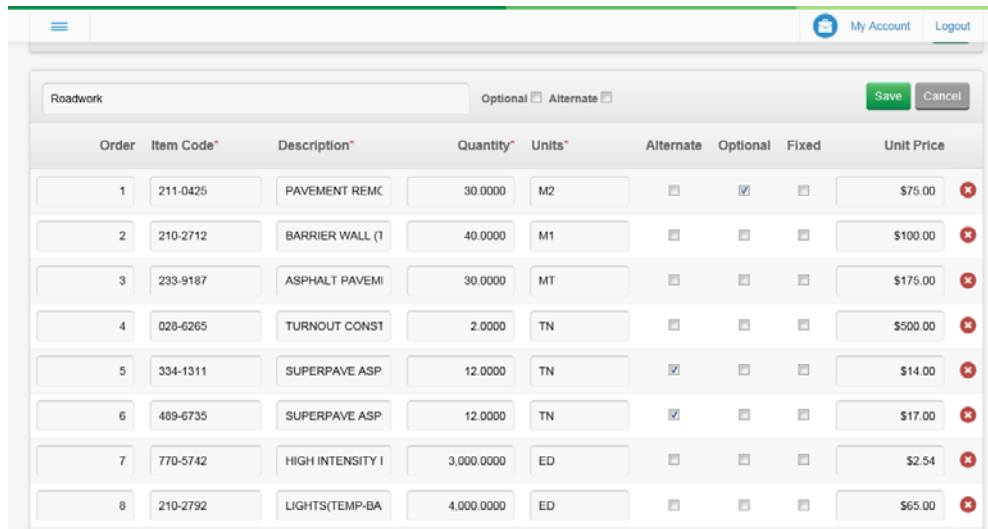
You can lock the components slider so it appears on your screen regardless of how far down you scroll in your solicitation. This also works for the Build Your Own slider. Click the LOCK icon next to the MORE button at the top right of your solicitation. The Bid Express service moves the slider to the top of your screen until you unlock it by clicking the icon again.

You can expand or collapse the information in any added component by clicking the icon for that component in your solicitation.

Once the deadline to respond to your solicitation has passed, the Components slider is no longer visible.

7.5.1 Optional and Alternative Components

Optional components are not required to be completed by the vendor. Alternate components are required to be completed by the vendor but may be awarded independently from the entire bid.



Order	Item Code*	Description*	Quantity*	Units*	Alternate	Optional	Fixed	Unit Price
1	211-0425	PAVEMENT REMC	30.0000	M2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$75.00
2	210-2712	BARRIER WALL (I	40.0000	M1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$100.00
3	233-9187	ASPHALT PAVEMI	30.0000	MT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$175.00
4	020-6265	TURNOUT CONST	2.0000	TN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$500.00
5	334-1311	SUPERPAVE ASP	12.0000	TN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$14.00
6	489-6735	SUPERPAVE ASP	12.0000	TN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$17.00
7	770-5742	HIGH INTENSITY I	3,000.0000	ED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$2.54
8	210-2792	LIGHTS(TEMP-BA	4,000.0000	ED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$65.00

Figure 7–10. Optional and Alternate Check Boxes for an Item List

An entire component can be marked as optional by selecting the Optional check box. If a component is marked as optional, the title of the component is italicized in the solicitation. The Attachment List and Text Page components are informational only and do not have an Optional check box.

Components can be marked as alternate by selecting the Alternate check box.

You can also mark items in an item list as alternate or optional, even if the item list itself is not marked that way.

7.5.2 Public Components

If you have restricted your solicitation to invited vendors and selected the option to make components public, you may see a Public check box when you are editing the component. Use this check box to make the component visible to all vendors. Vendors who were not invited to bid on the solicitation will be able to see the component, but cannot submit a solicitation for bidding.

Order	Item Code	Description	Quantity	Units	Alternate	Optional	Fixed (Unit Price)	Unit Price
Public: Component will be visible to all vendors.								
1	609-06729	REINFORCED CONCRETE BRIDGE APPROACH 12 IN	175.0534	SYS	✗	✗	✗	
2	701-09559	TEST PILE, DYNAMIC, RESTRIKE	23.0000	EACH	✗	✗	✗	

Order	Item Code*	Description*	Quantity*	Units*	Alternate	Optional	Fixed (Unit Price)	Unit Price
1	105-06845	CONSTRUCTION I	1.0000	LS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	110-01001	MOBILIZATION AA	1.0000	LS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3	211-02050	B BORROW	2,309.7339	CYS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4	211-06467	AGGREGATE FOF	54.9972	CYS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Figure 7–11. Public Check Box

7.5.3 Components Filter

You can filter the components slider to show only standard components or custom components. Custom components are the ones for which you’ve created a template (see Section 9.5).

You can choose from the following filters:

- Standard** Shows only standard components.
- Custom** Shows only custom components.
- All** Turns the filter off and shows both standard components and custom components.

Select the Filter icon next to the LOCK icon at the top of your solicitation. The Bid Express service displays the filter choices. Pick the one that suits your needs.

If you do not remember which filter is selected, click the Filter icon. A check mark displays next to the active filter.

You can also use the filter to quickly find a component. Click the Filter icon and enter the name of the component in the empty field at the bottom of the filter list. The Filter will find the item even if it is not part of the current component list.

7.5.4 Component Weight

If the solicitation is being set up as an RFP, you will see a Weight field in the header of some components. Use this field to designate how valuable the component is to the RFP. Weight designations are the responsibility of each agency. The score is multiplied by the weight to get the final score for the component.

Not all components, like attachments or questions and answers, will be weighted. Vendors will not see this weight on the RFP. You can make weight changes up until the evaluation deadline. You will not need to issue an addendum if you change the weight after a solicitation is advertised.

This field is not required. A Weight field with no value will not be considered in the evaluation. A value of 0 is considered a value. Vendors cannot see the weighted value of the component.

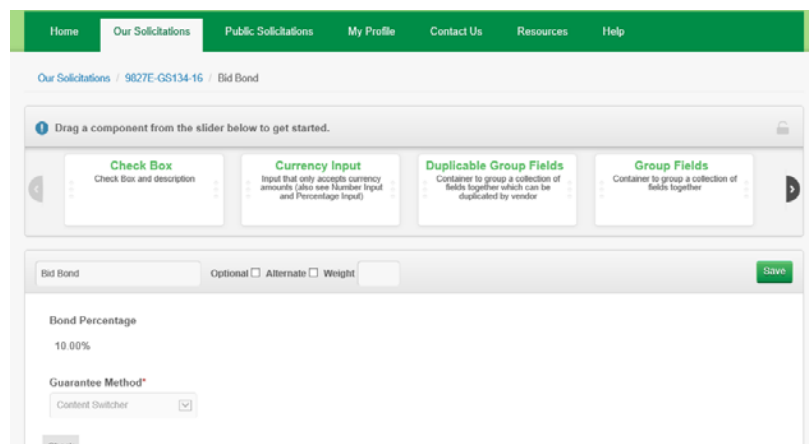


Figure 7-12. Weight Field

When you are editing the component, enter the weight assigned to the component in the Weight field. Once you save the component, the weight displays under the component header.

7.6 Item List

Unless otherwise noted, the actions you take for a solicitation can also be taken for a request for proposal.

The item list contains the items on which vendors bid. There can be more than one item list in the solicitation. Once the solicitation has been advertised, you will not be able to change whether the item list allows vendor entry.

Click **Item List** in the Components slider and drag it below the General Info section.

The screenshot displays a configuration interface for a solicitation. At the top, there are four tabs: 'Build Your Own', 'Envelope', 'Item List', and 'Required Document List'. The 'Item List' tab is selected. Below the tabs is a 'General Info' section with an 'Edit' button. The 'General Info' section contains the following fields and options:

- Number:** 57223-DAS70-15
- Deadline:** 04/08/2016 01:00 PM EDT
- Auto Advertise:** (checkbox)
- Description:** Repair road on 39th Avenue over I-75, Alachua County
- Allow zero unit prices and labor?:** Yes
- Allow negative unit prices and labor?:** Yes
- Allow multiple bids per vendor for this solicitation?:** No
- Allow vendors to ask questions?:** No
- Restricted?:** No

Below the 'General Info' section is an 'Item List' section with an 'Edit' button and a 'More' button. The 'Item List' section contains a table with the following headers:

Order	Item Code	Description	Quantity	Units	Alternate	Optional	Fixed (Unit Price)	Unit Price
-------	-----------	-------------	----------	-------	-----------	----------	--------------------	------------

Figure 7–13. Item List

Once an item list is added to the solicitation, items can be imported from a spreadsheet program in addition to being entered manually.

If you have more than 30 items in an item list, the Bid Express service will paginate the items so your bid will take less time to load. Navigate to the different pages using the numbered pages under the list. Unit prices entered into the item list compose the engineer's or agency estimate.

7.6.1 Adding or Editing the Item List

Add items to your list by entering the item information.

1. Click **Item List** in the Components slider and drag it below the General Info section.
2. Click EDIT. The item list expands to allow you to begin adding information.
3. Enter a title for the item list.
4. Select the Optional Component check box if this is not a required bidding component.
5. Select the Alternate Component check box if this list of items may be awarded independently from the rest of the bid.
6. If you are creating an RFP, enter the component weight in the Weight field (see Section 7.5.4).
7. If you are editing the list, change any item information.
8. Click ADD ITEM....
9. Enter the item information.
10. Click ADD ITEM... again to add more items and enter the item information.
11. Add unit prices to create the engineer's or agency estimate. The estimate will appear in the bid tabulations report (see Section 12.8) after the bids are opened.
12. Click SAVE.

If you want to add another item list, click **Item List** in the Components slider and drag it to your solicitation.

7.6.2 Item List Advanced Options

The Advanced options for an item list allow you to create new columns and set whether columns should be filled in by the vendor, set the number of decimal places for the unit price, labor price, and the quantity, include a percentage for sales tax, and set whether the item list and any alternates in the list should be included in the bid total. Unless you save the item list as a template, these options are included only on the list to which you added them.

1. On the SOLICITATIONS tab, select the solicitation if it is not already open to get to the solicitation details.
2. Click MORE for the item list.
3. Click ADVANCED OPTIONS. The Advanced Options window opens.

From here you can designate the decimal places and tax percent, add columns to the item list, and specify whether the item list should be included in the bid total.

The screenshot shows the 'Advanced Options' window for an item list. The window is titled 'Advanced Options' and has a close button in the top right corner. It contains several sections: 'Edit Column' with a text input for 'Item Code' and a dropdown for 'This column should:' set to 'Present data to bidder'; 'Edit Description' with a text input for 'Description' and a dropdown for 'This column should:' set to 'Present data to bidder'; 'Edit Quantity' with a text input for 'Quantity' and a dropdown for 'This column should:' set to 'Present data to bidder', plus a 'Show Column' toggle set to 'yes'; and 'Edit Column' with a text input for 'Units' and a dropdown for 'This column should:' set to 'Present data to b'. Below these are 'Decimals' (input: 2, description: 'Number of decimal places for unit price and labor'), 'Quantity Decimals' (input: 4, description: 'Number of decimal places for quantity'), and 'Tax %' (input: empty, description: 'Item list tax percentage'). At the bottom are three toggles: 'Include in Bid Total' (yes), 'Include Alternates in Bid Total' (yes), and 'Allow Vendor to Add Items' (no). An 'Apply' button is at the bottom left.

Figure 7–14. Item List Advanced Options

Decimal Places and Tax Percent

You can set the decimal places for the unit price and quantity and a percentage for sales tax.

When you include the sales tax, the tax is automatically applied to the item list and bid total. You can include separate item lists with and without taxes to the same solicitation.

1. Set the number of decimal places for the unit price, labor, and quantity using the Decimals drop down menu or leave the field set to the default. Unit price and labor can be set to between two and five places. Quantity can be set to between zero and four places.
2. Enter the sales tax in the Tax % field or leave this field empty if you are not using sales tax.
3. Click APPLY.

Unless you enter a unit price or labor for an item, you will not see the sales tax or decimal places take effect. However, the vendor will see it when it adds prices to its bid.

If you have item lists with different decimal settings, the vendor's bid total will reflect the decimal places of the larger setting.

Custom Item Columns

You can create custom columns in the item list and mark them as informational or to be filled in by the vendor. You can also set the order in which the columns display in the item list. The Description, Quantity, and Unit Price columns are required.

Item list columns are represented by a square with the column name inside. Order the columns by clicking on a square and dragging it to the desired location. If you are using labor and materials (or time and materials) bidding, scroll to the end of the column list to add a Labor column to the item list.

You can also remove columns from the list and set the order in which the columns display in the item list. The Description, Quantity, and Unit Price columns are required, though you can change their names and hide the Quantity column in your solicitation. If you hide the Quantity column, the quantity for every item in the list will be set to 1.

1. Click ADD COLUMN in the square to add a new column or select a column that already exists.
2. Enter the column name in the Edit Column field if necessary.
3. Select whether data will be presented to the bidder or if data needs to be entered by the bidder.
4. If the option is available, select if you want to display the column.
5. Drag the column to where you want it located in the item list.
6. Click ADD COLUMN in a new square to add a new column. You may have to use the scroll bars to see it.
7. When you are finished editing and ordering the columns, click APPLY.

If you set the option for the bidder to enter data, all values contained in that column will be deleted.

Click the red X on a column square to delete it. You cannot delete the Description, Quantity, or Unit Price columns.

Include in Bid Total

To include the item list in the bid total, Yes should be displayed in the Include in Bid Total option. Click the Yes toggle option to change it to No if you do not wish to include the item list in the bid total.

The Bid Express service displays a notice for the item list component in the solicitation if the bid total is not included. Select the Hide bid total banner check box to hide this notice from vendors.

Click APPLY if you make any changes.

Include Alternates in Bid Total

To include alternate items in the bid total, Yes should be displayed in the Include Alternates in Bid Total option. Click the Yes toggle option to change it to No if you do not want the bid total to include the alternate items. The Bid Express service displays a notice and an Alternate Estimate at the bottom of the item list component if alternate items are not included in the bid total.

Click APPLY if you make any changes.

An item list not included in the bid total will still be listed in the Bid reports after the bids have been fetched for the solicitation.

Allow Vendor to Add Items

To allow vendors to create their own item lists, Yes should be displayed in the Allow Vendor to Add Items option. Click the Yes toggle option to change it to No if you do not want the vendor to be able to add items.

You do not have to mark the list as optional. You cannot enter information into the same list as a vendor. If you have items in your item list and then use the option so the vendor can add items, your items will be deleted.

Click APPLY if you make any changes.

7.6.3 Importing an Item List

You can import an item list from a spreadsheet program. You can either add the imported items to an existing list or create a new one. If you add the imported list to an existing list, you can either delete all the current items or add the imported to the current list.

Item List Import

Select file Import Cancel

Select Worksheet: exportItems Skip the first 0 rows

Replace existing data?

Item Code* Description* Quantity* Units* Unit Price Fixed Item List*

Column 1	Column 2	Column 3	Column 4
Roadwork	Item Number	Unit	Description
	149-0100	LS	CONTRACTOR CERTIFIED CROSS SECTIONS NH-007-4(56) 01
	150-1000	LS	TRAFFIC CONTROL - PRC10-S008-00(108) 01
	151-1000	LS	MOBILIZATION - CSSTP-0006-00(307) 01
	209-0203	MG	STABILIZER MATL, TP III

Figure 7-15. Item List Import

Use the Select Worksheet field if the item spreadsheet isn't located on the first worksheet of the spreadsheet file. You can also tell the Bid Express service how many beginning rows to skip by using the Skip the first option. This is helpful to keep the table headers from being imported.

If the imported item list contains sections, use the Item List Title field to label the sections. The Bid Express software will create new sections if necessary and place the imported list into the appropriate sections.

1. Add an item list to your solicitation or use an item list that is already part of your solicitation. If necessary, use the advanced options to add or remove columns from the list.
2. Click MORE and select **Import**.
3. Click SELECT FILE.

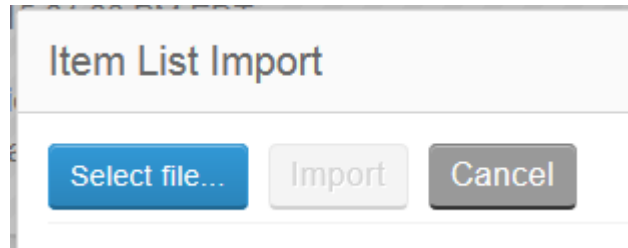


Figure 7–16. Select File Import

4. Navigate to the spreadsheet.
5. Select the spreadsheet and click OPEN.
6. If necessary, select the worksheet in the Select Worksheet field.
7. Click the down arrow next to the field headings to identify the matching columns on the spreadsheet. The ones with an asterisk are required. Each column can be matched only once. If there is no corresponding column, you can add the information after the list is imported.
8. Enter a number in the Skip the first field to tell the Bid Express service how many rows to skip at the beginning of the worksheet.
9. Select the Replace Existing Data check box if you wish to replace the items in your item list with these imported items.
10. Click IMPORT. The IMPORT button will not be available until all required fields have been entered.

The Bid Express service imports the file list and orders the items. Any errors with the import will be displayed and the field with the error will be highlighted in red. You must fix the errors before the Bid Express service can save your new item list. You can also choose if this item list is optional or an alternate.

You can edit the list as necessary, including changing the name of the list, the order of the items, and marking any alternate or optional items.

7.6.4 Deleting the Item List

You can delete the entire item list.

1. Click **MORE** for the list you wish to delete.
2. Select **Delete**.
3. Click **OK** in the delete confirmation window.

The Bid Express service deletes the list and returns you to the solicitation.

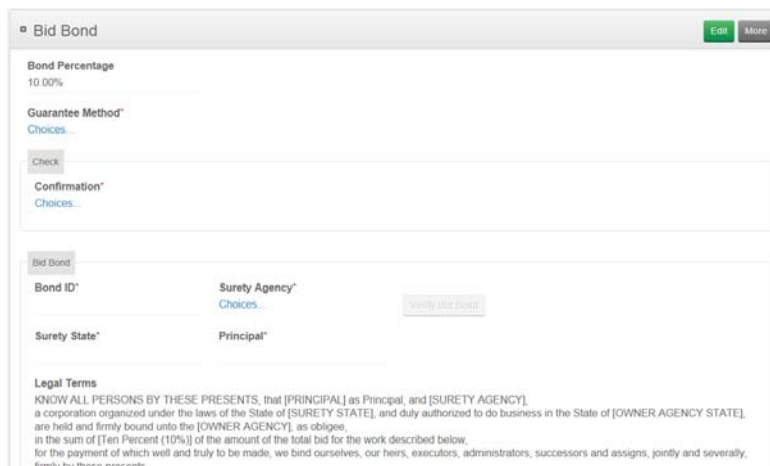
7.7 Bid Bonds

Bid bonds provide surety verification. Add a bid bond form to your solicitation by sliding the bid bond form component from the Components slider.

Once you add the bid bond, you can update some of the bid bond fields. Fields that can be edited display Settings and Delete options when you rest your mouse cursor on the field.

Edits to a field can include its name, its height or width, and whether it is required. You can also update the text and set the number of decimal places for numeric fields.

Note: Settings options vary depending on the type of field.



The screenshot shows a 'Bid Bond' configuration window with the following fields and options:

- Bond Percentage:** 10.00%
- Guarantee Method:** Choices...
- Check:** [Check]
- Confirmation:** Choices...
- Bid Bond:** [Bid Bond]
- Bond ID:** [Bond ID] [Verify Bid Bond]
- Surety Agency:** Choices...
- Surety State:** [Surety State]
- Principal:** [Principal]
- Legal Terms:** KNOW ALL PERSONS BY THESE PRESENTS, that [PRINCIPAL] as Principal, and [SURETY AGENCY], a corporation organized under the laws of the State of [SURETY STATE], and duly authorized to do business in the State of [OWNER AGENCY STATE], are held and firmly bound unto the [OWNER AGENCY], as obligee, in the sum of [Ten Percent (10%)] of the amount of the total bid for the work described below, for the payment of which well and truly to be made, we bind ourselves, our heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

Figure 7–17. Bid Bond

Follow these steps to add and edit a bid bond:

1. Drag the **Bid Bond** component into your solicitation.
2. Click EDIT.
3. If you are creating an RFP, enter the component weight in the Weight field (see Section 7.5.4).
4. Place your cursor on the field you wish to change and click the **Setting** wheel for that field.

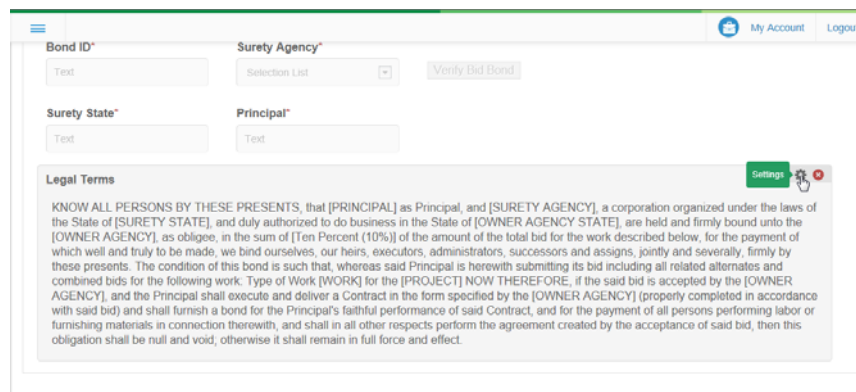


Figure 7–18. Settings Wheel for Bid Bonds Legal Terms

5. Enter the new field information.

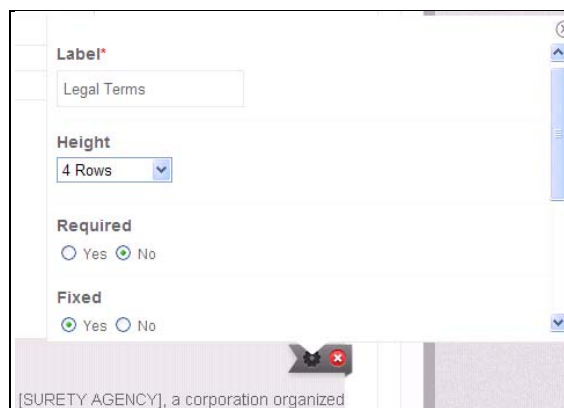


Figure 7–19. Settings Fields

6. Press the ENTER key.
7. When you are finished updating all fields, click SAVE.

8. Click the Settings wheel for other fields that need updated information. Save the fields when you are finished.
9. Click the solicitation number in the navigation trail to return to the solicitation.

7.8 Table

Use the table component to gather or provide information to the contractor. The table can contain as many columns as needed and can be set to allow vendors to add rows as well. There can be more than one table in the solicitation. Once the solicitation has been advertised, you will not be able to change whether a table allows vendor entry.

Click **Table** in the Components slider and drag it below the General Info section.

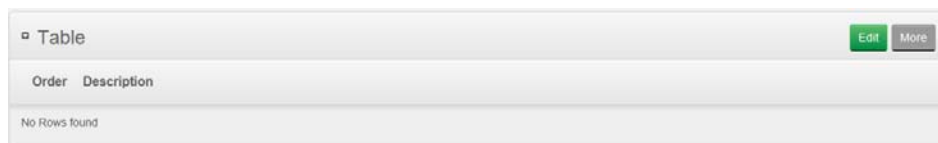


Figure 7–20. Table Component

Once table is added to the solicitation, table information can be imported from a spreadsheet program in addition to being entered manually.

The More menu contains the table advanced options, the ability to copy the table to a template, a way to import a table, and the delete option. These options apply only to the selected table, though you can copy the setup to a template for use in other solicitations (see Section 9.5).

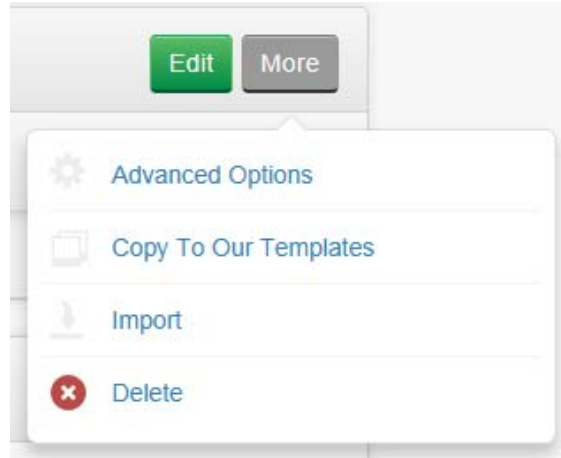


Figure 7-21. The Table More Menu

7.8.1 Table Advanced Options

The Advanced Options for a table allow you to create new columns, set whether columns should be filled in by the vendor, and if the vendor can add rows. Unless you save the table as a template, these options are included only on the table to which you added them.

To allow vendors to enter information in their own tables, Yes should be displayed in the Allow Vendor to Add Rows button. You do not have to mark the table as optional.

You cannot enter information into the same table as a vendor.

1. On the SOLICITATIONS tab, select the solicitation if it is not already open to get to the solicitation details and navigate to the table.
2. Click MORE and select ADVANCED OPTIONS. The Advanced Options window opens.

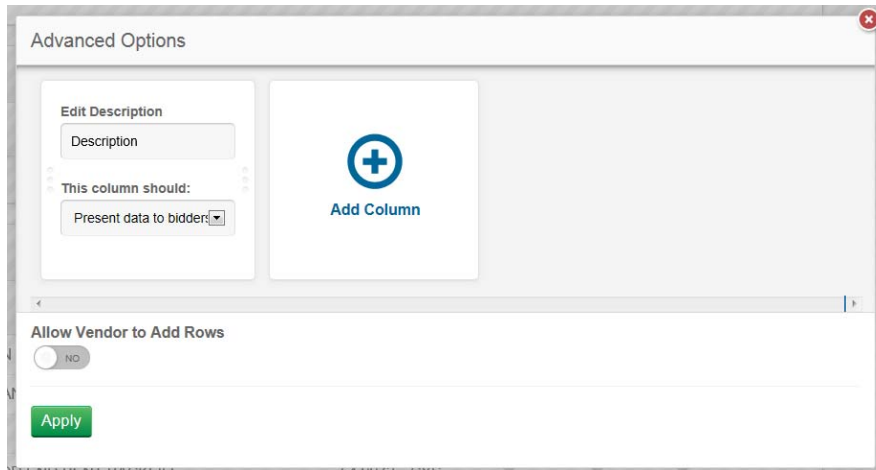


Figure 7–22. Item List Advanced Options

You can create custom columns in the table and mark them as informational or to be filled in by the vendor. You can also remove columns from the table. Order the columns by clicking on the column square and dragging it to its location.

1. Click ADD COLUMN in the square to add a new column or select a column that already exists.
2. Enter the column description in the Edit Description field if necessary.
3. Select whether data will be presented to the bidder or if data needs to be entered by the bidder.
4. Drag the column to where you want it located in the table.
5. Decide whether you want a vendor to be able to add rows to your table. If you choose to have the vendor add rows to your table, the service automatically sets all rows to have the contractor present the data.

Click the red X on a column square to delete it.

When you are finished editing and ordering the columns, click APPLY. If necessary, enter the component weight in the Weight field if you are creating an RFP (see Section 7.5.4).

7.8.2 Importing a Table

You can import a table from a spreadsheet program. You can add the imported table into an existing table or the solicitation will create a new table during the import. If you add the imported table to an existing one, you can either delete all the current rows or add the imported rows to the current table.

Every table in the solicitation must have a unique name. If the table being imported has information that needs to be sorted into different tables in the solicitation, there must be a column in the table being imported that lists the names of the tables in your solicitation. If a table is named that does not exist, the Bid Express service will create it.

Before importing the table, make sure the table in your solicitation contains all the columns being imported. For example, if the table you are importing includes a column for equipment, add the Equipment column to your table using the Advanced Options (see Section 7.8.1). This will make it easier for you to populate your table in the Bid Express service. If you forget this step, you can add the column after the import and enter any value needed.

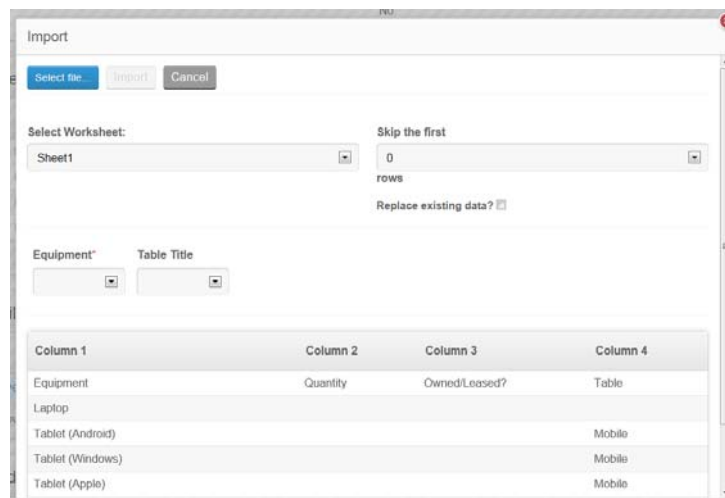


Figure 7–23. Table Import

1. Add a table to your solicitation or use a table that is already part of your solicitation. If necessary, use the advanced options to add or remove columns from the table.

2. Click MORE and select **Import**.
3. Click SELECT FILE.

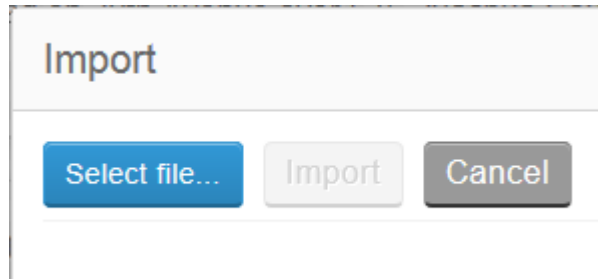


Figure 7–24. Select File Import

4. Navigate to and select the table. Click OPEN.
5. If necessary, select the worksheet in the Select Worksheet field.
6. Click the down arrow next to the field headings to identify the matching columns in the imported table. Each column can be matched only once. If there is no corresponding column, you can add the information after the table is imported.
7. Enter a number in the Skip the first field to tell the Bid Express service how many rows to skip at the top of the worksheet.
8. Select the Replace Existing Data check box if you wish to replace the rows in your table with the imported information. If you select this option, any information that already exists in the table in your solicitation will be deleted.
9. Click IMPORT. The IMPORT button will not be available until all required fields have been entered.

The Bid Express service imports the file. You can edit the table as necessary, including changing the name of the table and the order of the rows.

7.8.3 Deleting the Table

You can delete the entire table from the solicitation.

1. Click **MORE** for the table you wish to delete.
2. Select **Delete**.
3. Click **OK** in the delete confirmation window.

The Bid Express service deletes the table and returns you to the solicitation.

7.9 Envelope

The envelope component allows you to ask the vendor to include information that will be visible after the bid deadline has passed but before the bid is opened. This is helpful in cases of multiple bids to identify what the vendor is bidding upon. The envelope is customized by using components from the Build Your Own slider (see Chapter 8).

You can use an envelope in a Required Documents List component to review documents prior to opening the bids.

You will be able to sort the bids using the vendor's response to the first component listed in the envelope. This will help ensure the bids are opened in the order of your agency's requirements for electronic bid submissions. It is recommended you use an input component, such as a Selection List, so the information can be sorted. For example, if your Selection List component has the options of Yes, No, or Maybe, you will be able to sort the bids based upon the vendors' responses.

7.10 Preferences

The preferences component allows you to include a discount on the total bid amount in order to implement preference policies regarding different business types, such as

minority or locally owned. The preference is customized by using components from the Build Your Own slider (see Chapter 8).

You can save the component as a template so you do not need to reenter the information for each solicitation (see Section 9.5).

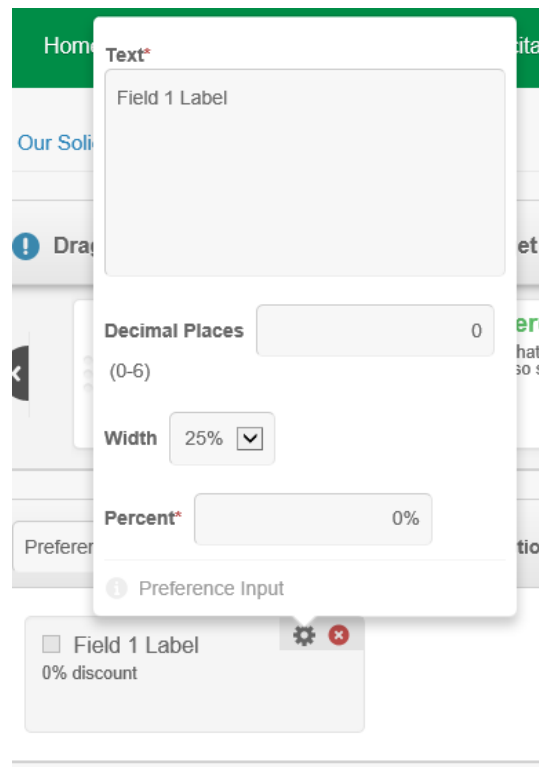


Figure 7–25. Preference Settings

1. Select **Preference** from the components slider and drag it into your solicitation.
2. Click EDIT. The Bid Express service opens the Preference build your own slider.
3. Mark it as optional if you wish.
4. The Preference Input component on the Preferences slider contains the fields for the type of business preferences. Select the Preferences Input component and drag it to the Preference section.
5. Select the Settings wheel.

6. Enter the business type in the Text field.
7. Set the decimal places in the Decimal Places field. For example, if the preference discount is 4.25 percent, set the decimal places to 2.
8. Enter the percent of the discount in the Percent field. If no decimal places are set, the number entered will be rounded to the nearest whole number.
9. Press ENTER to leave the settings.
10. Select any other components for the preference section.
11. Once all the components are added to the preferences, click SAVE.

Select the solicitation name in the navigation trail to return to the solicitation.

7.11 National Institute of Government Procurement Codes

You can add National Institute of Governmental Purchasing (NIGP) codes to your solicitation. Vendors who have selected the codes will be notified that a solicitation using their selected codes has been advertised. The notification log lists what vendors received the email.

7.11.1 Add Codes

You can add NIGP codes to your solicitation.

1. Select MORE above the components slider.
2. Select **Codes**. The Bid Express service adds a Codes section to your solicitation.
3. Click MANAGE CODES. The Bid Express service opens the Manage Codes window where you choose your class and then select the codes for items in that class.

4. Enter the class in the Choose a class field or click the arrow to select the class from the list.
5. Enter a code in the Choose a code field or click in the field to select the code from the list.
6. Keep entering codes for the selected class until you are finished.
7. Click **SAVE** when all codes have been added.

Repeat the process to add more classes and codes.

7.11.2 Remove Codes

If you added the wrong codes to your solicitation, you can delete them.

1. In the Codes section of your solicitation, click the red X for the code you wish to delete.
2. Click **OK** in the Delete Confirmation window.

The code will be deleted from your solicitation.

7.12 Notification Logs

Notification logs lists actions that have been taken for the solicitation by vendors or the owner–agency. This includes which vendors received NIGP® code information, advertising the solicitation, a vendor asking a question, and posting an addendum, among other things.

1. Before the solicitation deadline, click **More** and select **Notification Logs**.
2. After the solicitation has closed, click **Notification Logs**.
3. Click **Print** to print the log.

8. Build Your Own Solicitation Component

The Bid Express service allows you to design your own components to fit your needs. Use the Build Your Own feature to create a component unique to your agency with fields that you name and the vendors fill out. You can group fields together into sections or create lists with different answers for the vendor to choose. Unless otherwise noted, the actions you take for a solicitation can also be taken for a request for proposal.

Both the Bid Bond and Envelope components use the Build Your Own slider to create customized fields. The first field in the envelope component can be used to sort bids once the bid deadline has passed (see Section 7.9).

Joint Venture Information

Are you a Joint Venture?
Choices...

The following fields need to be completed only if you are a joint venture.
Each business in the joint venture must provide the required documentation.

Business Contact Information

Business 1 Name	Business 1 Street Address	Business 1 City, State, Zip	Business 1 Phone Number
Business 2 Name	Business 2 Street Address	Business 2 City, State, Zip	Business 2 Phone Number

Figure 8–1. Build Your Own Component Example

There are several different types of elements that can be added to your solicitation:

Element Name	Type of Vendor Input
Check Box	Vendor can select the check box.
Currency Input	Vendor will enter money amounts.
Duplicable Group Fields	No vendor input. Elements are kept together to allow for grouping related information into sections. The vendor can duplicate this field up to 20 times for addition input, for a total of 21 entries. If you feel the vendor may need to input more than 21 entries, create a second duplicate group field.
Group Fields	No vendor input. Elements are kept together to allow for grouping related information into sections.
Label	No vendor input. This field is used by the owner-agency to label information.
Link	Vendor will click link to open the designated web page.
Multiline Text Input	Vendor will enter text.
Number Input	Vendor will enter numbers. Only numbers are allowed in this field. Use the Phone Number field to require the vendor to enter a phone number.
Paragraph	No vendor input. This allows you to create a paragraph or multiple lines of text for informational or other purposes.
Percentage Input	Vendor will enter numbers for a percentage.
Phone Number	Vendor will enter a phone number. If this field is required, vendor must enter ten digits. Use the auto-populate selection to have the Bid Express service use the phone number previously entered by the vendor.

Element Name	Type of Vendor Input
Selection List	Vendor will choose among the selections you create.
Text Input	Vendor will enter one line of text. Use the auto-populate selection to have the Bid Express service use the contact information previously entered by the vendor.

Most fields can be further edited to change the label, size, requirements, and other settings to fit your needs. If a vendor may need to enter input several times with different information, use the Duplicate Group Field component.

1. On the SOLICITATIONS tab, select the solicitation to get to the solicitation details if it is not already open.
2. Click **Build Your Own** on the Components slider and drag it into your solicitation.
3. Click EDIT. The Bid Express service displays a Build Your Own Components slider.

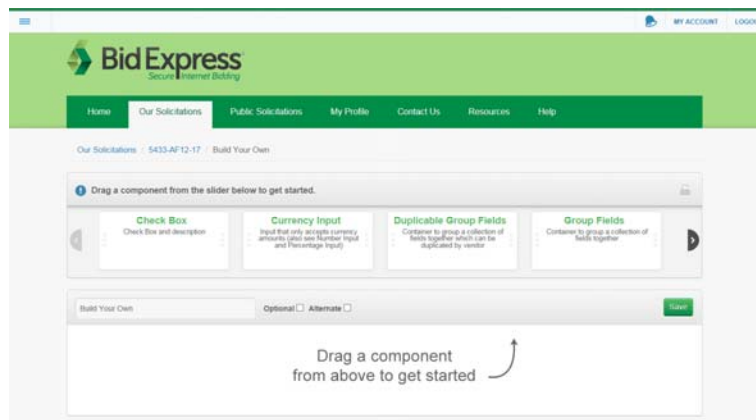


Figure 8–2. Build Your Own Component Slider

4. Enter your title in the Build Your Own title field.
5. If you wish, click the LOCK icon to lock the slider.

6. If you are asking for information the vendor may want to input several times with different information, use the Duplicable Group Fields component before adding the other fields. You can group related fields using the Group Fields component.
7. Select the component you want to add from the Components slider and drag it into your component or into your group.
8. Click the **Settings** wheel for the component. The paragraph component does not have a settings wheel. Use the auto-populate selection for the Phone Number and Text Input components to have the Bid Express service use the phone number and contact information previously entered by the vendor.
9. Enter the information for the component, such as its label and if it is required. For the paragraph component, click directly into the field to enter your information. You can format the paragraph using the icon at the top of the field. Rest your mouse cursor over each icon to see its function.
10. Press ENTER to leave the settings. For the paragraph component, click anywhere outside of the paragraph field.
11. Drag any other components from the slider to the Build Your Own section.
12. Click the Settings wheel and enter information for each component.
13. Press ENTER to leave the settings.
14. When you are finished adding the components, click SAVE for the overall Build Your Own component.
15. Click the solicitation number in the navigation trail to return to the solicitation.

9. Solicitation Templates

Templates are a convenient way of creating solicitations that contain the same information. If you need the same information from a vendor for each contract, or if your scoring system or weights for a request for proposal remain the same for each RFP, you can add the information to the template. In addition, if there are documents you need every vendor to fill out, you can add those, too. Unless otherwise noted, the actions you take for a solicitation can also be taken for a request for proposal.

You can also create a template of a solicitation component. Once saved, it can be accessed from the Components slider.

Create a template by clicking the **TEMPLATES** button on the **OUR SOLICITATIONS TAB** and selecting **CREATE SOLICITATION TEMPLATE**, or by starting a solicitation and then saving it as a template. If you are creating a template, the template will take on the vendor restriction of the agency. If you are using a solicitation to create the template, the template takes on the restriction of the solicitation.

The **OUR SOLICITATIONS** tab lists the templates. You can also create solicitations from this page.

9.1 Create a New Template

Create a template from the Templates section of the OUR SOLICITATIONS tab. After the template is saved, it can be used to start a solicitation (see Section 9.1.1).

1. Log in to the Bid Express service and select the OUR SOLICITATIONS tab if you are not already there.
2. Click the TEMPLATES button on the right.

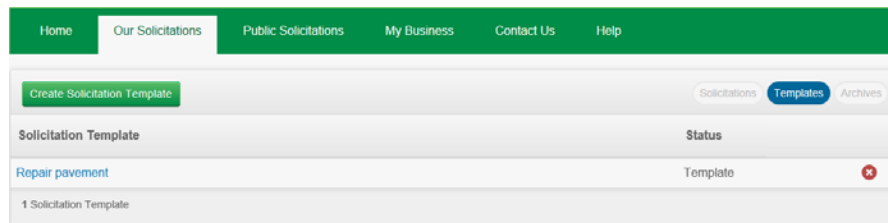


Figure 9–1. Template Section of Our Solicitations Tab

3. Click CREATE SOLICITATION template.
4. Enter your template number and general description in the General Info section.
5. Click **Solicitation Options** to see the list of options for the template.
6. Set the allowance of zero or negative values for unit prices in item lists.
7. Decide if you will allow vendors to ask questions and if your template will be restricted to invited vendors only when you use it to create a solicitation.
8. Decide if this template will be for RFPs.

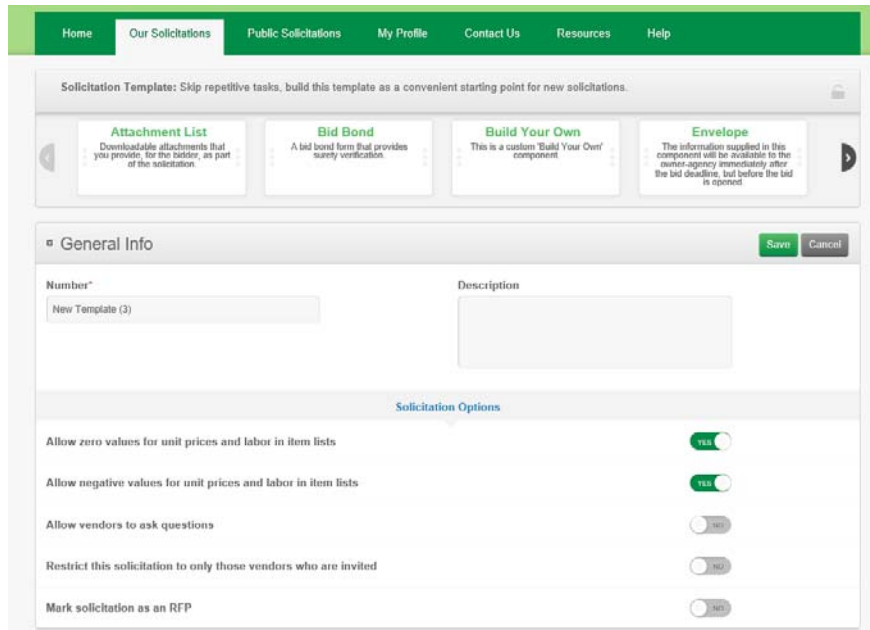


Figure 9–2. Solicitation Template

9. Click SAVE.
10. Use the information in Section 7.5 to add components to your solicitation template.
11. When you are finished adding and saving components, click the OUR SOLICITATIONS tab.
12. Click the TEMPLATES button.
13. View your template.

9.1.1 Using a Template to Start a Solicitation

Once you've created the template, you can use it to create solicitations. Open the template and add the necessary components.

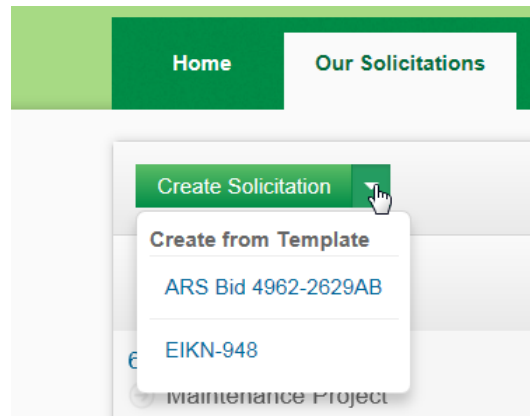


Figure 9–3. Create From Template Option

1. Select the OUR SOLICITATIONS tab if you are not already there.
2. Click the down arrow next to the CREATE SOLICITATION button.
3. Select the template from the list.
4. Enter the new solicitation number in the General Info section.
5. Enter a description in the Description field.
6. Verify the options and vendor restrictions.
7. Click SAVE in the General Info section.
8. Add components to your template like you would for an original solicitation (see Section 7.5 for details).
9. Click SAVE when you are finished adding each component.

When you are finished creating and saving the solicitation from the template, it will be listed on the OUR SOLICITATIONS tab.

9.2 Turn a Solicitation Into a Template

In addition to being able to create solicitation templates, you can also create templates out of solicitations that already exist. Templates made from solicitations take on the restrictions of the solicitation.

1. Select the OUR SOLICITATIONS tab if you are not already there.
2. Open the solicitation you wish to turn into a template.
3. Click MORE and select **Create Template**.

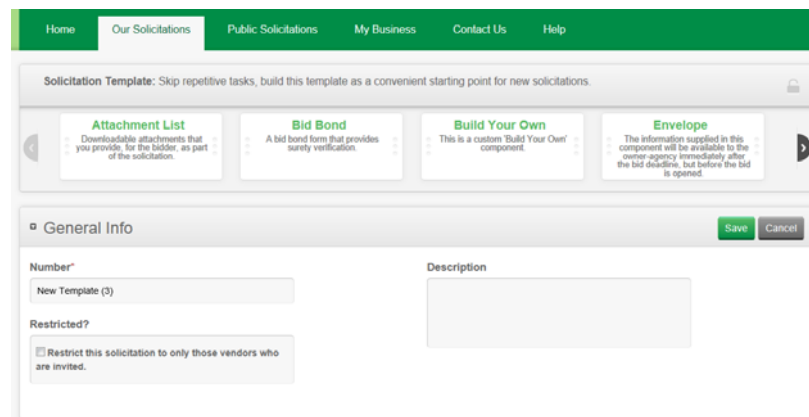


Figure 9-4. Create Template of an Advertised Solicitation

4. Add a template name or number.
5. Decide on the template restrictions.
6. Enter a new description.
7. Update any other component information for the new template.
8. Click SAVE.
9. Select the OUR SOLICITATIONS tab.
10. Click the down arrow next to CREATE SOLICITATION.
11. Find your new template.

9.3 Deleting a Template

You can delete a solicitation template from the Bid Express system.

1. On the OUR SOLICITATIONS tab, click the TEMPLATE button.
2. Click the X for the template to delete.
3. Click OK.

9.4 Copying a Template

You can use a template to create another template.

1. On the OUR SOLICITATIONS tab, click the down arrow next to the CREATE SOLICITATION button and select the source template.
2. Click CREATE TEMPLATE.
3. Name the new template in the Number field and click SAVE.
4. Use the EDIT buttons to customize this template.

Edit the template by adding standard components and Build Your Own components from the component slider. Once you save your template, the Bid Express service makes it available in the Solicitation Template section of the OUR SOLICITATIONS tab.

9.5 Component Templates

A component template is a standard component modified to fit the needs of your solicitations. Once the standard component is edited, you save it to the Components slider. There it will be available for future solicitations. Not all components can be used to create a component template.

To use a component template in your solicitation, drag it into the work area like you would a standard component. Deleting a component template from the Components slider deletes it from every solicitation, not just the current one.

1. On the SOLICITATIONS tab with the solicitation open, drag the component from the Components slider into your solicitation.
2. Click EDIT. Change the title to what you want displayed in the components slider.
3. Enter any additional information in the component.
4. Save the component.
5. Click MORE for your component and select **Copy to Our Templates**.

The Bid Express software saves the component to the slider and displays a successfully saved message. You can now use the component template in all your solicitations.

You can edit a component template after it is saved to the Components slider. However, the template will not be updated in solicitations that already have the template in use.

To edit a component template:

1. On the SOLICITATIONS tab, click the component in the slider and drag it to the work area.
2. Make the necessary changes.
3. Save the component.
4. Click MORE for your component and select **Copy to Our Templates**.
5. Click OK in the confirm replace message that displays or click CANCEL to not update your template.

The Bid Express software displays a successfully saved message. Remember the component template is not updated in solicitations where the template is already in use.

Delete the component template by selecting the X for the component and clicking ok in the confirmation window. Deleting the component does not remove it from any solicitation where it is already in use.

10. Advertise and Update Your Solicitation

Unless otherwise noted, the actions you take for a solicitation can also be taken for a request for proposal.

Once your solicitation has been completed, it is ready to be advertised. Remember you must have an active Digital ID or selected the option to use electronic signatures in order to advertise a solicitation.

When you advertise the solicitation, it becomes available to be bid upon by Bid Express vendors. You can make changes to your solicitation after it has been advertised, but you must issue an addendum for those changes. You can also withdraw the advertisement and then advertise it again.

Changes to the deadline date can be done only with a solicitation amendment. You can move the deadline earlier or later than the original due date.

10.1 Advertise Your Solicitation

Click the **ADVERTISE** button to advertise your solicitation. Enter any advertising notes. These display in the history of the solicitation and are visible to both you and the vendor.

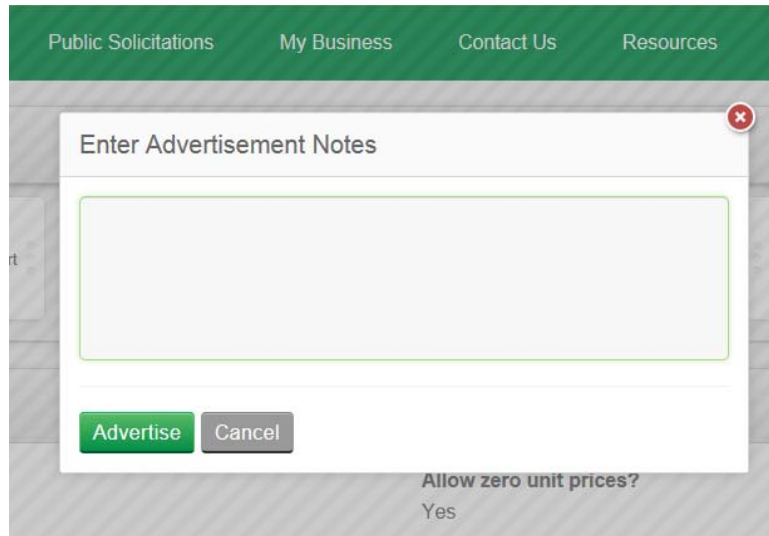


Figure 10-1. Enter Advertisement Notes

1. Select the solicitation to get to the solicitation details if it is not already open.
2. Click ADVERTISE. The Bid Express service opens the Advertisement Notes window.
3. Enter your advertising notes.
4. Click ADVERTISE.

Once you click Advertise again, the Bid Express service advertises your solicitation and returns you to the solicitation details. The Bid Express service displays an Advertised status message.

If you make changes to your solicitation after it's been advertised, you must issue an addendum.

10.2 Plan Holders List

The Plan Holders section contains information about vendors who either added themselves to the plan holders list or selected your solicitation for bidding. If you

chose to add users who downloaded attachments to your plan holder list, the section includes them as well.

The status of the solicitation displays how many bids have been submitted.

The vendor's name, email address, and company information are put on the plan holders list. You can see this list by clicking the MORE button above the Components slider and selecting **Plan Holders** for a solicitation that has been advertised. If the solicitation is withdrawn, the plan holders list is deleted.

If a vendor selects your solicitation for bidding and later deletes it, the vendor has the option of removing its company name from the plan holders list. If the vendor chooses not to remove the company name and another user at the same company selects the solicitation for bidding, both users will show up as plan holders.

The Receives Notifications column indicates that the vendor has elected to receive all notifications sent by the owner–agency.

You can make the plan holders list visible to vendors. Click POST PLAN HOLDERS while the list is visible in the solicitation. The Bid Express service automatically updates the Plan Holders list if a vendor selects a solicitation for bidding or withdraws a bid. Click WITHDRAW PLAN HOLDERS to remove the list from the vendor's view. These actions are noted in the solicitation history.

You can send an email to all the members of the Plan Holders list.

1. Click NOTIFY to open the Notify Plan Holders window.
2. Decide whether you want to send the message to those who have downloaded attachments from the solicitation but are not part of the plan holders list. You will not see this option if there are no users that fit that criteria.
3. Enter your message.
4. Click NOTIFY.

The Notify Plan Holders window closes and returns you to the solicitation. The act of notifying vendors is added to the solicitation history, though the actual notice is not displayed.

Select Plan Holders from the MORE button again to remove the section display from your solicitation.

10.3 Change Your Solicitation and Issue an Addendum

After a solicitation has been advertised, any changes to the solicitation require an addendum. You can see how many bids will be affected by the bid count in the status.

The Bid Express service will notify you when an addendum is needed by changing the status on the opening Solicitations tab page and posting a warning at the top of the solicitation on the details page.

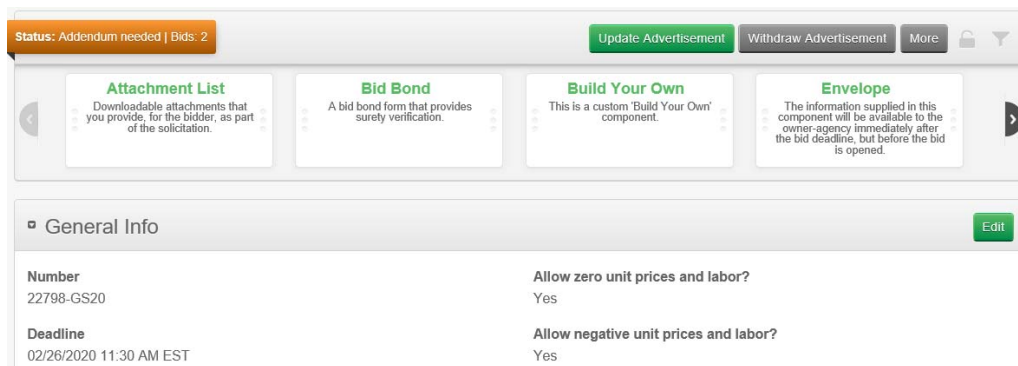


Figure 10–2. Addendum Needed

1. Select the solicitation to get to the solicitation details if it is not already open.
2. Click EDIT for the component you need to edit.
3. Make the changes. The deadline for the Q & A component date cannot extend beyond the solicitation deadline. If you make the solicitation deadline earlier than the current deadline, you may have to also change the Q & A deadline.

4. Click SAVE.
5. Make any other changes as necessary.
6. Click update advertisement.
7. Enter the reason for the update.
8. Click UPDATE.

The Bid Express service adds the addendum to the solicitation. The next time the vendor views its solicitations, an icon will notify the vendors that there are changes and the amendment must be uploaded in order for their bids to be current. In addition, an email notification is sent to any vendor who had selected your solicitation for bidding. The amendment information is added to the solicitation history.

If you change the deadline or remarks for the Q & A component, select the Require Addendum check box if you wish to send out an addendum with the change. Otherwise, no addendum will be issued, but vendors will receive an email notification of a date change.

10.4 Withdraw Advertisement

You can withdraw a solicitation after it has been advertised. Any bids made on the solicitation and the plan holders list are deleted.

1. Select the solicitation to get to the solicitation details if it is not already open.
2. Select WITHDRAW ADVERTISEMENT.
3. Enter the withdrawal details. (If you previously entered any advertising or amendment notes, you will see those in the field.)
4. Click WITHDRAW.

When you withdraw a solicitation, a notice is sent to any vendor who had already selected your solicitation for bidding, and bids made on the solicitation and the plan holders list are deleted.

10.5 History

The history is a list of actions taken for the solicitation, including notes and if and when the solicitation was advertised or withdrawn.

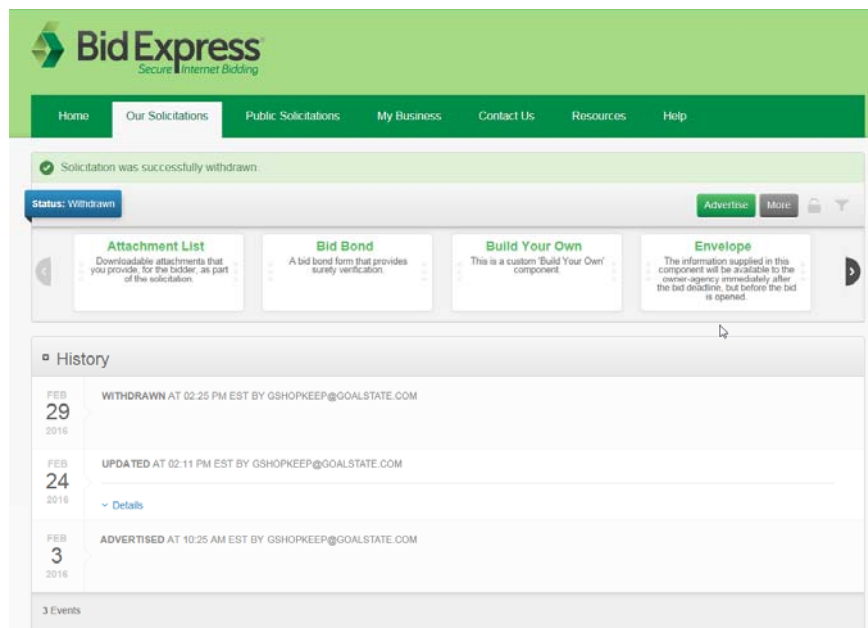


Figure 10–3. Solicitation History

1. Select the solicitation to get to the solicitation details if it is not already open.
2. For a closed solicitation, click **History**. For an open solicitation, click MORE in the upper right corner and select **History**.
3. View the history information.
4. Click MORE and select **History** again to remove the history from the solicitation display.

10.6 Re-advertise the Solicitation

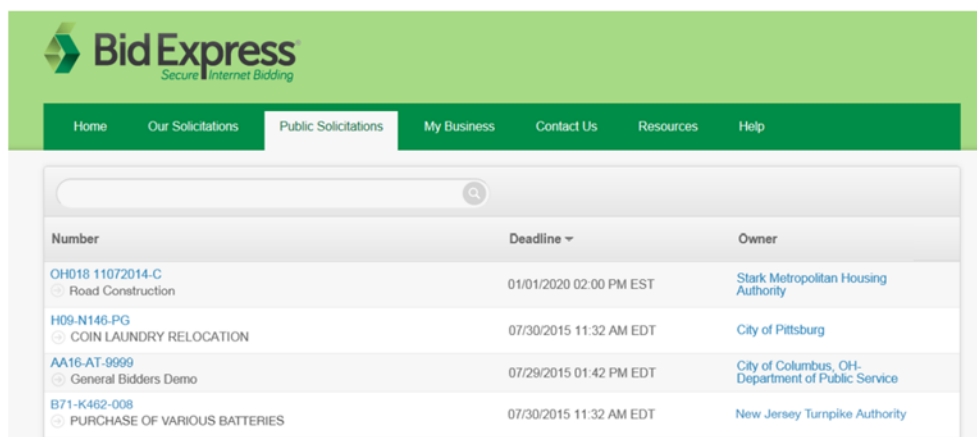
You can re-advertise your solicitation after it has been withdrawn.

1. Select the solicitation to get to the solicitation details if it is not already open.
2. Click ADVERTISE.
3. Enter the re-advertisement details.
4. Click UPDATE.

When you update a solicitation, an email notification is sent to any vendor who had selected your solicitation for bidding. The updated information is added to the solicitation history.

11. Public Solicitations

The PUBLIC SOLICITATIONS tab lists all the solicitations available for bidding or requests for proposals that have been advertised by any owner–agency, including your company. The Number and Deadline columns can be sorted by clicking on the column name.



The screenshot shows the Bid Express website interface. At the top, there is a green header with the Bid Express logo and the tagline "Secure Internet Bidding". Below the header is a navigation menu with tabs: Home, Our Solicitations, Public Solicitations (which is selected), My Business, Contact Us, Resources, and Help. Below the navigation menu is a search bar with a magnifying glass icon. Below the search bar is a table with three columns: Number, Deadline, and Owner. The table contains four rows of solicitation data.

Number	Deadline	Owner
OH018 11072014-C Road Construction	01/01/2020 02:00 PM EST	Stark Metropolitan Housing Authority
H09-N146-PG COIN LAUNDRY RELOCATION	07/30/2015 11:32 AM EDT	City of Pittsburg
AA16-AT-9999 General Bidders Demo	07/29/2015 01:42 PM EDT	City of Columbus, OH- Department of Public Service
B71-K462-008 PURCHASE OF VARIOUS BATTERIES	07/30/2015 11:32 AM EDT	New Jersey Turnpike Authority

Figure 11–1. Public Solicitations Tab

You can search for an owner–agency, solicitation number, NIGP code, or description by entering search criteria in the Search field. Click the magnifying glass to start the search.

To see the details of a solicitation, click the solicitation number in the Number column. This brings you to the details of the solicitation. When you are finished viewing solicitation details, click the PUBLIC SOLICITATIONS tab again to return to the list.

Click the agency name to see the agency home page, including a list of open and closed solicitations and standard documents.

12. After the Solicitation Deadline

After your solicitation deadline has passed, the Bid Express service is ready to fetch the bids or responses to your RFP. You can also manually enter any paper bids. When all bids have been retrieved, you can post the apparent bid results. Unless otherwise noted, the actions you take for a solicitation can also be taken for a request for proposal.

If you used the envelope component, you can sort the bids based upon the vendors' responses. You can also export the bids or view the bid tabs and the plan holders list.

12.1 Retrieving Bids or RFP Responses

Once the deadline has passed, the Fetch Bids or Fetch Responses feature becomes available. This feature downloads bids submitted over the Internet, including bids that are incomplete or have errors. You cannot fetch bids if your current Digital ID (if required) is not the same one that was active when the solicitation or RFP was advertised, or if you were not added to the response as an evaluator before the RFP was advertised.

The bids are listed in the Submitted Bids section. If you used the envelope component, you can sort the bids with the Envelope column.

Use the Open Bid, Open Response, or Open All buttons to see the bid or response amount and the person who signed the bid, and the account holder for solicitations using electronic signatures. When the buttons are no longer available, all submitted bids or responses have been downloaded.

Follow these steps to fetch bids or responses:

1. On the OUR SOLICITATIONS tab, select the solicitation if it is not already open.
2. Click FETCH BIDS or FETCH RESPONSES.

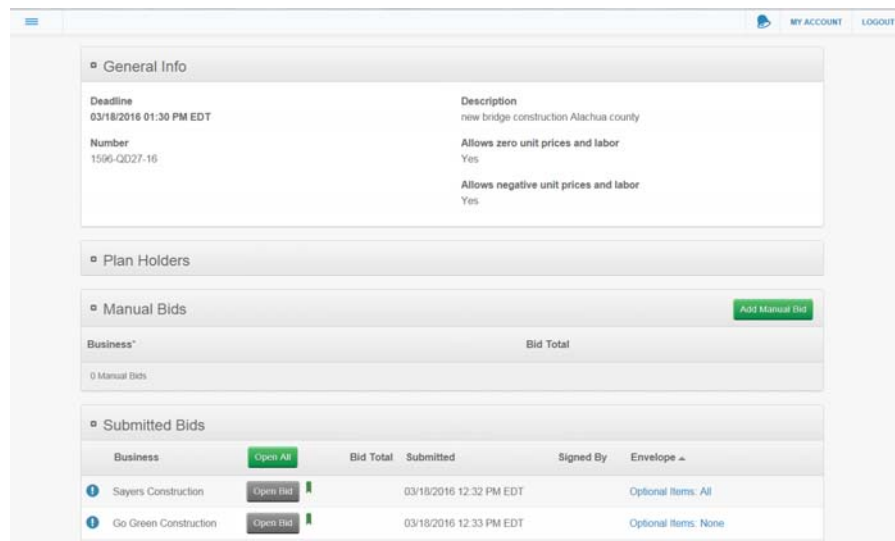


Figure 12-1. Bids Page

3. Click OPEN BID, OPEN RESPONSES, or OPEN ALL to see the submitted bids or responses.

Out-of-date or incomplete bids or responses will be marked with a flag. Open the bid or response to see the incomplete fields, marked with an outline. Out-of-date bids or responses can be determined by the agency by looking at the date in the Submitted column.

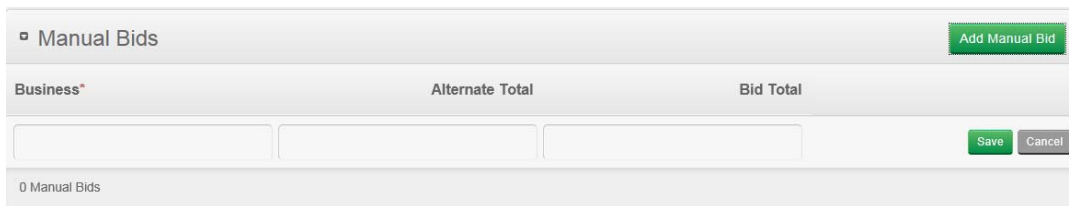
Once the bids or responses have been opened, you can click on the business name to see the details. Return to the previous page by clicking [Bids](#) or [Responses](#) in the navigation trail.

12.2 Entering Manual Bids

Bids that are submitted on paper or on another medium have to be entered manually. You cannot manually enter RFP responses.

! **Caution:** There is no automatic verification to ensure you've entered the correct component information.

1. With your bid details open, click Fetch Bids.
2. Click ADD MANUAL BID in the Manual Bids section. You will not see the Alternate Total field if there are no alternate items.



The screenshot shows a software interface for entering manual bids. At the top, there is a section titled "Manual Bids" with a green "Add Manual Bid" button. Below this, there is a table with three columns: "Business*", "Alternate Total", and "Bid Total". Each column has an empty input field. To the right of the input fields are "Save" and "Cancel" buttons. At the bottom left of the table, it says "0 Manual Bids".

Figure 12-2. Manual Bids

3. Enter the business name in the Business field and click SAVE. The Bid Express service saves the entry and marks it with a green flag, indicating the bid is responsive (see Section 12.3).
4. Select the business's name in the Business column of the Manual Bids section. This opens the Manual Bid Entry page.

Manual Bid for Right Tight Construction

Bid Status: Incomplete

Alt Total: Total:

Save Check Bid

Roadwork

General Info View Q & A

Deadline 07/31/2015 12:30 PM EDT	Number 42795-GS15
Advertised 06/30/2015 12:31 PM EDT	Description Roadwork on 39th Ave
Revised 07/08/2015 03:24 PM EDT	Allows zero unit prices and labor Yes
Business Name City Agency	Allows negative unit prices and labor No

Roadwork Import Export

Figure 12–3. Manual Bid Entry Details

Each section is listed at the top. Click a section name to go to that section.

5. Enter the values for each section.
6. Once all the details are entered, click SAVE.
7. If the bid is incomplete, click CHECK BID. Enter the values and click SAVE again.
8. Once the bid is complete and saved, click Back to Fetch Bids in the navigation trail.

The manual entry form will not be marked complete until all required components are complete. The Bid Express service will total all items and alternate items and display the value in the Alternate Total (if applicable) and Bid Total fields of the Fetch Bids page.

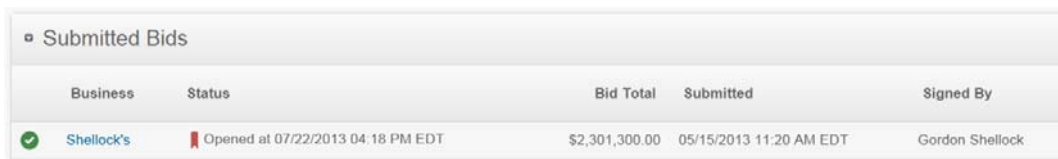
If you need to change the business name, click the EDIT pencil icon on the Fetch Bids page. Click the DELETE X icon to delete a bid that was manually entered.

12.3 Non-Responsive or Out-of-Date Bids

Once the bids have been fetched, the Bid Express system checks them for responsiveness and completeness. Responsive bids are marked with a green flag. Bids that are entered manually are also marked with a green flag.

Any bids with issues are marked as non-responsive or out of date with a red flag. You can also click the green flag to mark bids as non-responsive. You can change non-responsive or out-of-date bids to responsive by clicking the red flag.

Note: Bids that are manually entered cannot be marked non-responsive.



Submitted Bids					
Business	Status	Bid Total	Submitted	Signed By	
✓ Sherlock's	✗ Opened at 07/22/2013 04:18 PM EDT	\$2,301,300.00	05/15/2013 11:20 AM EDT	Gordon Sherlock	

Figure 12-4. Non-Responsive Red Flag Status

If you choose to post the apparent bids, you can decide whether to display the non-responsive bids (see Section 12.5).

12.4 Evaluate Responses

If you are an evaluator for an RFP, you will see the EVALUATE button on each scored component once the response has been opened.

You can also update the evaluators, the deadline for the evaluation (see Section 7.4), and the component weights before you fetch the responses. You can change a component's weight until the evaluation deadline has passed. You can change the score until an evaluator has entered a score. To update a component's weight, open the solicitation and click UPDATE WEIGHT for the component.

If no criteria or scores are defined, if there was no weight specified for the component, or if the deadline has passed, you will see only the Notes field.

When you are finished with your evaluation, click CHECK EVALUATION at the top of the response to make sure all components have been evaluated.

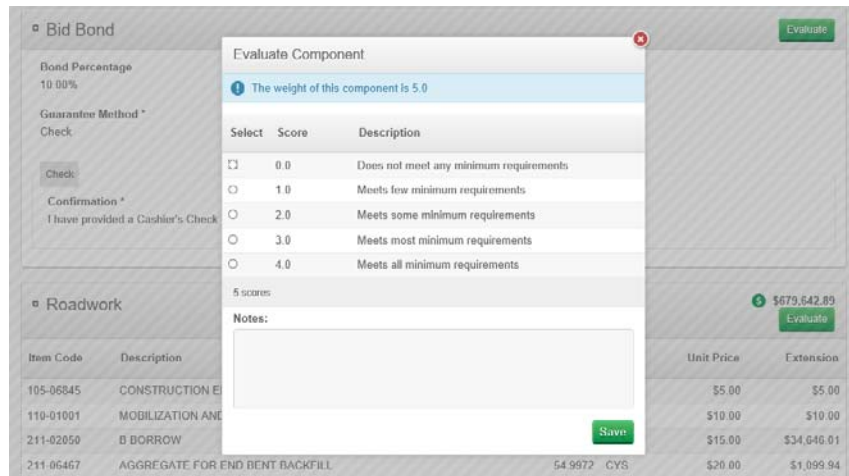


Figure 12-5. Evaluate Component

1. Select the business name in the list of submitted responses.
2. Once a component has been reviewed, click EVALUATE for the component. You will not see this button if you are not an evaluator for this solicitation.
3. Select the score for the component and enter any notes.
4. Click SAVE.
5. Repeat the process for other scored components.

Select Responses in the navigation trail to return to the previous page.

12.5 Apparent Bids or Responses

Once bids or responses to RFPs have been fetched or entered, you can post the apparent bids. When apparent bids are posted, all Bid Express vendors and other agencies can see the results through the closed solicitations list on your

agency home page. If you post the apparent bids and then delete or change the status of a bid, you can post the apparent bids again to reflect the change.

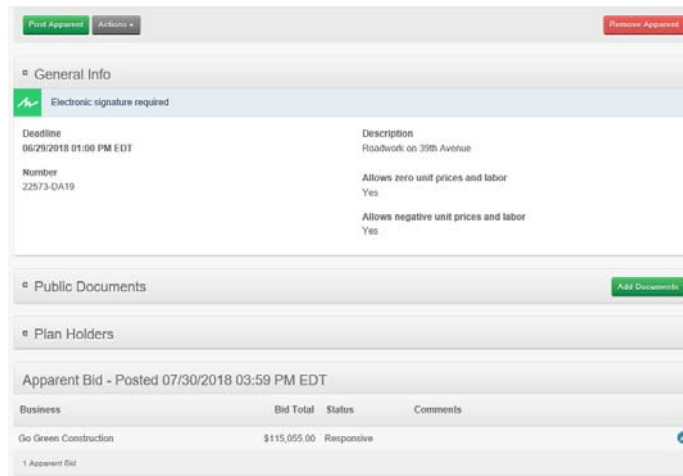


Figure 12–6. Post Apparent Bids

You can also make comments on each bid and post non-responsive bids and alternate bid totals if you wish.

12.5.1 Post Apparent Bids or Responses

You can post the apparent bids or responses to an RFP. You can choose whether you wish to post non-responsive bids. Any comment made on a posted bid will be visible to the vendor and other agencies.

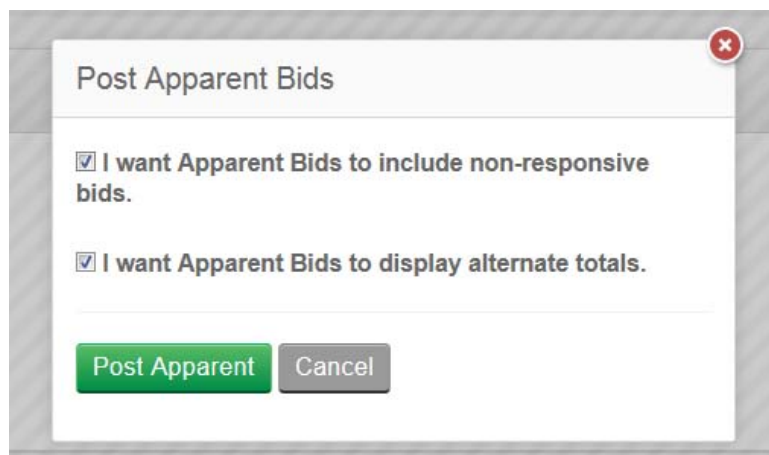


Figure 12–7. Non-Responsive Bids Option

1. With your bid details open, click FETCH BIDS OR FETCH RESPONSES.
2. Click post apparent or post responses.
3. If you do not want to post non-responsive bids with the apparent bids, clear the non-responsive bids check box.
4. If your bid includes separating the alternate totals from the bid total and you do not want to post the alternate totals, clear the alternate totals check box.
5. Click post apparent or post responses.

Once the bids or responses are posted, you can add comments (see Section 12.5.2).

The Bid Express service posts the business name and bid or response total for all bids that have been fetched or manually entered into the system. Bids are listed in the order in which they were opened or entered with the manual bids listed first. Bids marked non responsive (see Section 12.3) are not listed unless you choose to do so.

Vendors that bid on this solicitation will receive an automatic email message when apparent bids are posted.

To remove the apparent bids list:

1. Click FETCH BIDS OR FETCH RESPONSES if you do not have the solicitation details open.
2. Click remove apparent or remove responses.

12.5.2 Comments

You can comment on any bid in the Apparent Bids or Response section. The comments are visible to vendors and other agencies if you post the apparent bids.


Response - Posted 12/28/2016 11:29 AM EST			
Business	Response Total	Status	Comments
Go Green Construction	\$968,993.02	Responsive	
Bankhead Construction Company	\$1,021,368.44	Non-Responsive	Did not apply amendment 
2 Responses			

Figure 12–8. Response Comment

1. Click the pencil icon in the row for the bid or response you wish to comment upon.
2. Enter your comments in the Comment field.
3. Click SAVE.

12.6 Public Documents

You can post documents, such as a notice of award, to a closed solicitation. Anyone who can navigate to the solicitation can view the documents. Vendors who are plan holders for the solicitation or who have signed up for agency notifications will receive an email that a document has been uploaded.

1. On the OUR SOLICITATIONS tab, select the solicitation to get to the solicitation details if it is not already open.
2. Click FETCH BIDS or FETCH RESPONSES.
3. Click ADD DOCUMENTS in the Public Documents section. The Add Public Documents window opens.
4. Click BROWSE.

5. Navigate to and select the document file you want to add. You can select more than one document by pressing and holding down the CTRL key as you select each document.
6. When all the documents are selected, click OPEN.
7. Click SAVE in the Add Public Documents window.

The Bid Express service attaches the file to the solicitation and sends out the notification to the appropriate vendors.

To delete a public document, click the X for that document and click OK in the confirmation window.

12.7 Bids Actions

Once bids have been fetched, you can export opened and unopened bids or responses into a spread sheet or an XML file. Non-responsive or out-of-date bids are not exported. When the bids have been opened, you can also create a .pdf file of all the bids and download the XTabDat.dat file to use with construction management software. You can also download a .zip file of the data to import into the Infotech Appia® service.

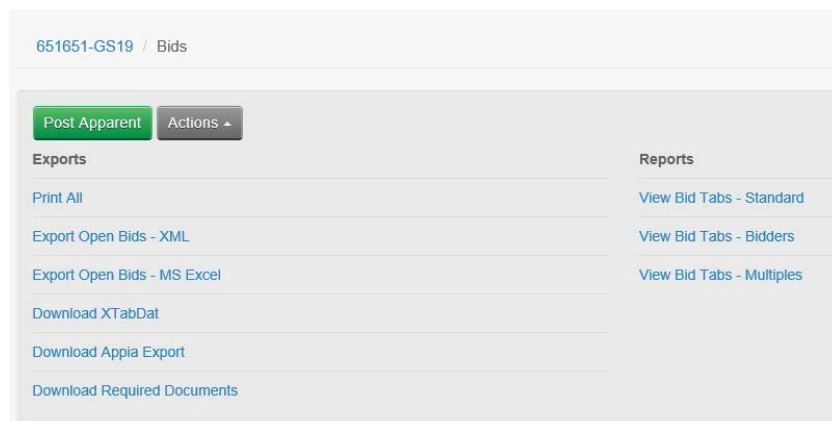


Figure 12–9. Bids Actions

1. On the OUR SOLICITATIONS tab, select the solicitation to get to the solicitation details if it is not already open.
2. Click fetch bids or fetch responses.
3. Click **Actions** and select what you want to do.

12.7.1 Print Bids

You can create a PDF of individual submitted bids or all of the submitted bids received for a solicitation.

1. Select the bid you wish to print on the Fetch Bids page.
2. Click ACTIONS and click and click PRINT PDF, or click PRINT ALL under Export to print all the bids in the solicitation.
3. Open or save the file.

12.7.2 Export Bids or Responses

You can export opened and unopened bids or responses into a spread sheet or an XML file. Non-responsive or out-of-date bids are not exported.

When you export unopened bids, the Bid Express system includes the date and time of the submission in the exported file, plus the envelope responses if applicable. Opened bids also include the bid amount.

1. If you are exporting unopened bids, click EXPORT MS EXCEL in the Submitted Bids section on the Fetch Bids page. Click SAVE or OPEN to either save or open the file.
2. If you are exporting opened bids, click ACTIONS at the top of the page.
3. Select either **Export Open Bids – XML** or **Export Open Bids – MS Excel**, or **Export Responses – XML** or **Export Responses – MS Excel** from the Actions menu to export the bids or responses in the desired file format.

4. Click **SAVE** or **OPEN** to either save or open the file.

The exported report for opened bids also contains the names of any attachments and bid bond information submitted by the vendors. If you use MS Excel for the export, you can see a summary of the responses and the item list, plus any tables or documents if they were included in the solicitation.

12.7.3 Download XTabDat

The XTabDat.dat file is used with construction management software. The file includes item lists not included in the bid total, but their extensions are not added to bid total.

1. Select **Download XTabDat**.
2. Open or save the file.

12.7.4 Download Appia Export

The Appia export downloads the bids in a way that can be imported by the Appia service to either create a new project or import bid data.

1. Select **Download Appia Export**.
2. Open or save the file.

12.7.5 Download Required Documents

If there are required documents in your solicitation, you can download them in a zip file after the bids have been opened.

1. Select **Download Required Documents**.
2. Open or save the file.

12.8 Reports Actions

Once bids or responses have been fetched and opened or manually entered, you can view the bid tabulations for the solicitation and make them visible to the vendor. If you have an RFP, you can also select Scoring Report.

Reports do not contain non-responsive bids or the alternate total if it was excluded from the bid total. If there is an engineer's or agency estimate, the total of the estimate displays at the end in all reports. Alternate items not included in the bid total are not added to the item list extensions or the bid total. The bid total is the sum of all item lists included in total but does not include custom fields.

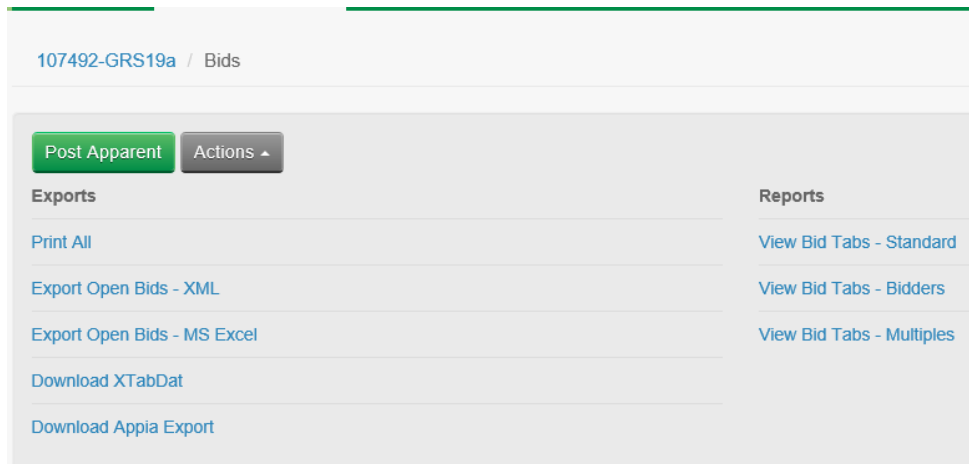


Figure 12–10. Reports Actions

1. On the OUR SOLICITATIONS tab, click the solicitation to get to the solicitation details if it is not already open.
2. Click FETCH BIDS or FETCH RESPONSES to display the bid action bar.
3. Click **Actions** and select the type of report you want.

12.8.1 View Bid Tabs

You can view bid tabulations in multiple ways: Standard, Bidders, or Multiples.

- Standard bid tabs display what vendors bid for each item of the solicitation and the total bid amount.
- Bidders bid tabs display the bid tabulations and the item list for the solicitation, what vendors bid for each item, and the total bid amount for each item list.
- Multiples bid tabs display what vendors bid on each item in each item list.
- If you have an RFP, you can also select Scoring Report.

You can also download the XTabDat.dat file or a .zip file of the data to import into the Appia service.

1. Select the type of bid tab you want: Standard, Bidders, Multiples bid tabs, Scoring Report, or Download XTabDat.
2. If you selected Download XTabDat, open or save the file.
3. To make the report visible to vendors, click POST TO VENDORS. Click WITHDRAW FROM VENDORS to remove the report from the vendor's view.

You can download the report as a CSV file. Click EXPORT BID TABULATIONS–MS EXCEL or EXPORT RESPONSES – MS EXCEL. Open or save the file.

To create a PDF file of the bid tabs, click PRINT BID TABULATIONS or PRINT RESPONSES from within the report. Open or save the file.

12.8.2 Scoring Report

The scoring report displays the evaluators' totals for each vendor that responded, including incomplete evaluations. The evaluator's score for a component is multiplied by its weight to get the final component score.

1. Select **Scoring Report**.
2. Open or save the file.

