infotech®

Bid Express®
Vendor Registration and Training Guides

February 2021

2970 SW 50th Terrace, Gainesville, FL 32608
www.infotechinc.com

infotech

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.

Contact

By mail:

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Bid Express® Toll free phone:
(888) 352-2439, option #1
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By Fax:
(888) 971-4191

Knowledge center:
https://infotechinc.zendesk.com/hc/en-us

Suggestions/ideas/general input:
feedback@bidexpress.com

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Contents

1. Registration and Setup

Welcome to the Bid Express® service. This document is for vendor managers and users.

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

Figure 1–1. Login Page

This Bid Express service is a different system than the Bid Express service that uses the Bid component of the AASHTOWare Project Bids™ software. Please be sure you are signing up for the correct one. If you need help, please contact customer support at support@bidexpress.com.

1.1 System Requirements

The new Infotech® multi-browser Digital ID and electronic signatures can be used with most modern browsers.

If you are using the old 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.

2. Manager Information

If you are the first person to register for an account for your company, you are automatically assigned the role of manager. You can also invite other users to the service and assign this role to other users. You cannot change your own role.

2.1 Register for a Manager Account

Note: For instructions on registering if you were sent an invitation email, please see the User Account Activation section.

Use these instructions if you are the first person in your company to register for an account.

1. Click **Register** on the service's login page. The service takes you to the Registration page. The information on the right may vary depending on to what service you are registering.
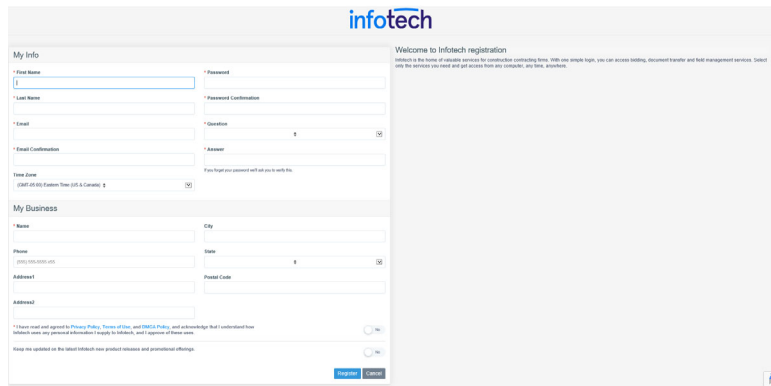
Figure 2-1. Registration Page
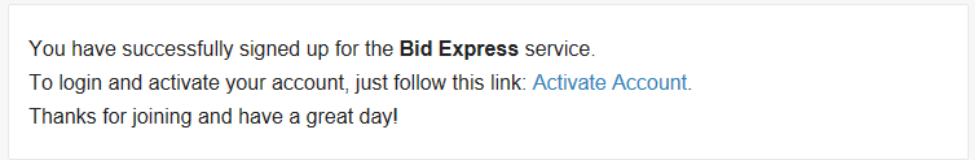
2. Enter your first name in the First name field of the My Info section.

3. Enter your last name in the Last name field.

4. Enter your valid email address in the Email field. This is the email address to which the service will send notifications and messages.

5. Re-enter your email address in the Email Confirmation field.

6. 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.

7. Re-enter the password in the Confirm your password field.

8. Select a security question from the Questions list.

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

10. Enter the legal name of your business in the Name field of the My Business section.

11. Enter your business's phone number and address in the proper fields.

12. Read the Privacy Policy, the Terms of Use, and the DMCA Policy by selecting the links at the bottom of the page.

13. Click the X in the title bar of the policies when you are finished to return to the Registration page.

14. Select the option to indicate you have read and agree to the Privacy Policy, the Terms of Use, and the DMCA Policy.

15. Select the update option to receive emails about new product releases and promotional offerings.

16. Click REGISTER.

If there is a business in the system with a similar name to the one you entered, you will see an informational message. If it is not your company, click CREATE NEW BUSINESS. If this is your company, click REQUEST INVITATION. The manager registered with the service will receive an email with your request.

If you created a new business, the service gathers your information and sends an activation email to the entered email address and displays the name of the service for which you registered. You must click the link in the email in order to activate your account.

> **Note:** If you do not see this message, please check your Spam folder.

You have successfully signed up for the **Bid Express** service.
To login and activate your account, just follow this link: Activate Account.
Thanks for joining and have a great day!

Figure 2–2. Account Activation Email

Once you click the link in the email, the Activate Account page opens.

Figure 2–3. Account Activation

Enter the password you used on the registration page in the Password field and click ACTIVATE. The service returns to the home page.

Depending on the agency, you may need to install the Sign Tool and generate an Infotech Digital ID in order to bid on solicitations. You may need only electronic signatures for bidding. For more information, please see the Infotech Digital ID Page chapter.

Figure 2–4. Digital ID and Electronic Signature

2.2 Manage Employees

As a manager, you can 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**.

The Employees section of the My Account page lists all the employees of the organization, their contact information, and their assigned roles.
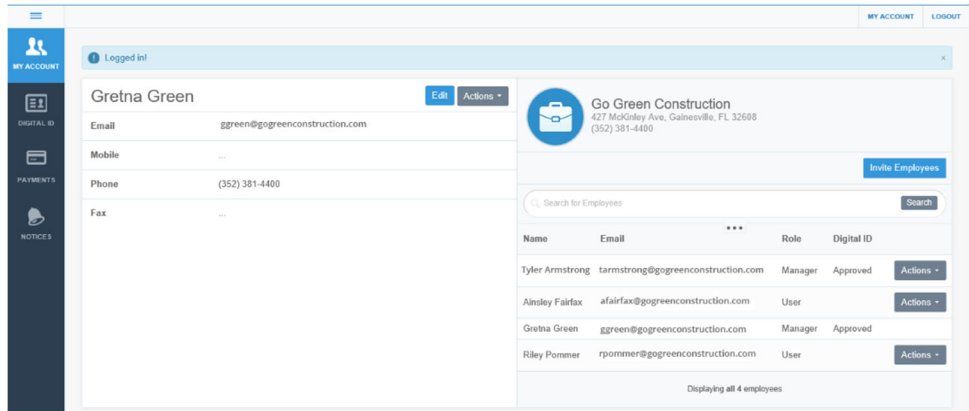
Figure 2–5. My Account Page With Employees

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 displays 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.

2.2.1 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 2–6. Employee Search

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

2.2.2 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.

2.2.3 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 knowledge center 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 add an existing account to your business.

See the My Account Page chapter for more information on uploading the logo or changing your information.

Manager Information

3. 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.

Figure 3-1. 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.

4. 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 email, password, time zone, and challenge question.
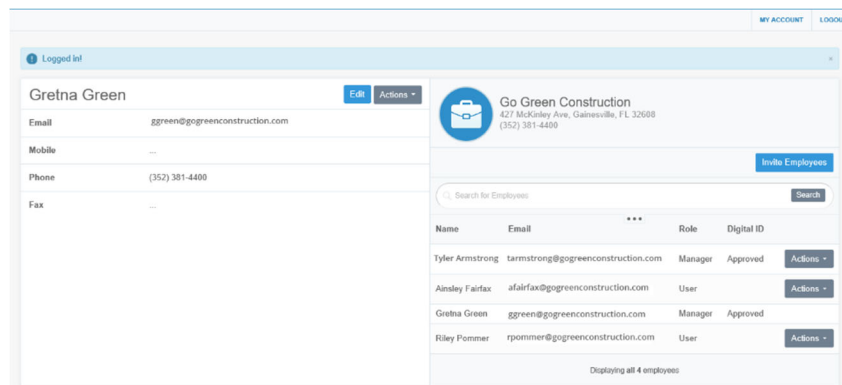
Figure 4–1. My Account Page – Manager

If you are a manager, you can also upload a business logo and invite employees to join your business (see Section 2.2.2).

4.1 Employees

The Employees section of the My Account page lists all the employees of the organization, their contact information, and their assigned roles.
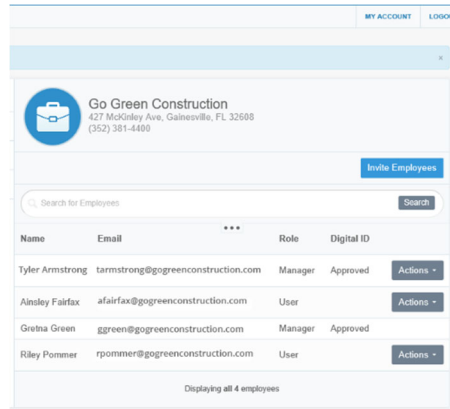
Figure 4–2. My Account Page With Employees

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. Digital IDs generated after October 2020 are the multi–browser IDs and can be used with most web browsers, like Chrome or Edge. IDs generated before October 2020 are the legacy IDs, which can be used only with Internet Explorer. Once employees start the process of registering for IDs, the status and type of their IDs display next to their names on the My Account page.

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.

4.1.1 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 4‑3. Employee Search

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

4.2 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 4–4. My Account Updates

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

4.3 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.

4.3.1 Change Password

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

Figure 4–5. 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.

4.3.2 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.

4.3.3 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. The answer is case sensitive.

4. Enter your password and click SAVE.

4.4 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.

5. 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

As technology advances, the way Digital IDs are used also advances. Depending on when your ID was created, you either use a single-browser Digital ID (for use with Internet Explorer) or a multi-browser Digital ID (for use on most modern web browsers, such as Chrome).If you're using the single-browser Digital ID, you will also need the 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 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. New IDs will be created using the multi-browser ID technology (though it can be used with your current bids).
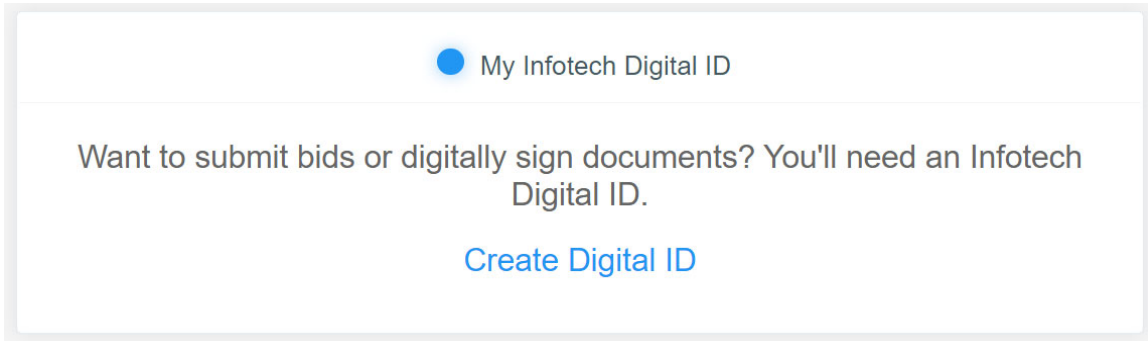
Figure 5-1. Create Digital ID

5.1 Multi-browser Digital ID

- You'll need access to your email in order to receive a verification code.

- You'll need a copy of the your driver's license, passport, or state ID in a file that can be uploaded.

- An Infotech customer support representative will call the you, hopefully within one business day, to confirm their identification.

- The ID must be installed after the identify is confirmed.

- It may take up to seven days to complete the entire process.

5.1.1 Create the Digital ID
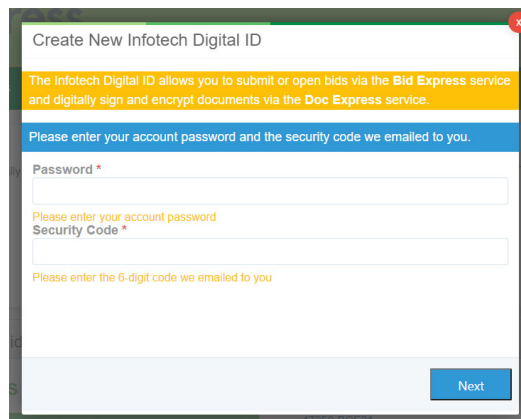
Figure 5-2. Create New Infotech Digital ID

1. Click **Create Digital ID** to start the application.

2. Get the security code from your email and come back to the generate ID process.

3. Enter your account password and the code. Click **Next**.

4. Read the creation information and click **Next**.

5. Click **Attach Identification**. Navigate to and select the file containing your ID and click **Open**.
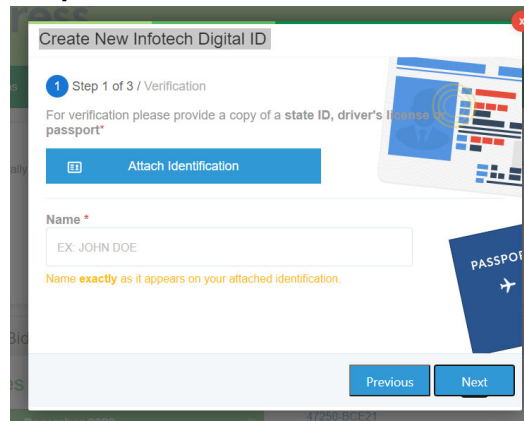
Figure 5–3. Create New ID Attach Identification

6. Enter your name EXACTLY as it appears in the ID, including any punctuation marks or suffixes (like Jr.), and in legal order. Click **Next**.

7. Enter your contact phone number.

8. Enter the state where the company headquarters are located. Click **Next**.

9. Review your business information. Confirm that the name of the person listed is the authorized signer for your company and your company name matches how you would like to submit bids to the agency. Click **Submit**.

A member of the customer support team will call you after the application is processed, hopefully within one business day, to confirm who you are. Once that happens, you'll get an email with instructions on installing your multi–browser Digital ID.

5.1.2 Install and Back Up the Digital ID

- When installing the ID, log in to the Infotech service from the same device and use the same browser as when you created the ID.

- Create the backup ID when prompted and save it to an external media, such as a flash drive. You'll need it if you use a different computer or if you experience data loss. If you create the ID on a laptop using Chrome, you can't use it on a laptop using Edge or Desktop using Chrome unless you import it. The service will let you know if you have to import your ID.

- The service does not keep a copy of your ID file.

- If you haven't yet deleted the backup file of your old Digital ID, now's a good time to do it.

Once your business information has been checked, you'll receive an email with a link to install your ID.
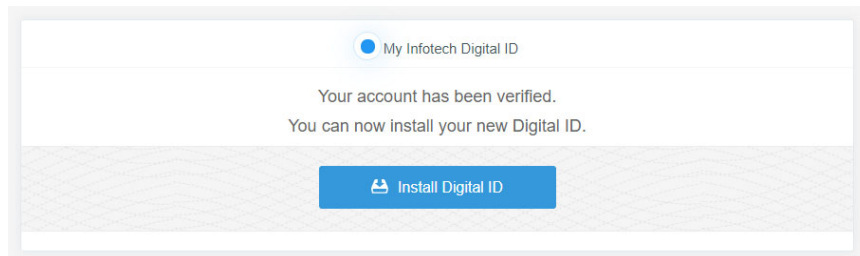
Figure 5–4. Digital ID Account Verification

1. Click the link, or log in to your account. You can manage the installation of your Digital ID from the Digital ID tab of the My Account page.

2. Click **Install Digital ID**.

3. Create your backup ID by clicking **Back Up Your Digital ID**.

4. Click **Back Up**.
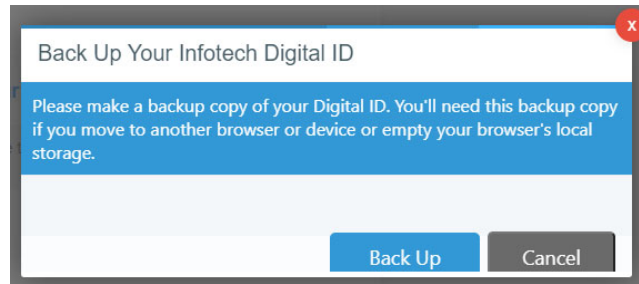
Figure 5–5. Back Up Your Infotech Digital ID

5. If you see a Save As window, navigate to the flash drive or other external media where you will save your backup Digital ID. If you don't see the window, your backup ID was saved in your Downloads folder. Copy the backup to the flash drive or other external media.

5.2 Back Up and Import Your Digital ID

You created a backup of your Bid Express Digital ID as part of the instructions for generating the ID. You can also create a backup from the Digital ID page. Import the backup if you move to a new computer or if you experience data loss.

5.2.1 Back Up Your Digital ID

1. Select the Global Navigation menu (represented by the three lines in the upper left corner) and select **My Account**.

2. Select Digital ID from the side menu to see the My Digital ID page.

3. Click BACK UP, then click BACK UP again.

4. If you see a Save As window, navigate to the flash drive or other external media where you will save your backup Digital ID. If you don't see the window, your backup ID was saved in your Downloads folder. Copy the backup to the flash drive or other external media.

Use the Global Navigation menu to return to the Bid Express service.

5.2.2 Import Your Digital ID

Import the backup of your ID if you change computers. You must know the location and password of your backup ID. The service is not able to reset or change this password.

1. Select the Global Navigation menu (represented by the three lines in the upper left corner) and select **My Account**.

2. Select Digital ID from the side menu to see the My Digital ID page.

3. Click IMPORT.

4. Navigate to the location and select the backup of your Digital ID.

5. Click OPEN.

6. Enter your Digital ID password and click OK.

The service imports the backup of your Digital ID and returns you to the Digital ID page. Use the Global Navigation menu to return to the Bid Express service.

5.3 Infotech Express Sign Tool

If you have an older Digital ID, the Infotech Express Sign Tool utility may be required. If it is necessary, 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.
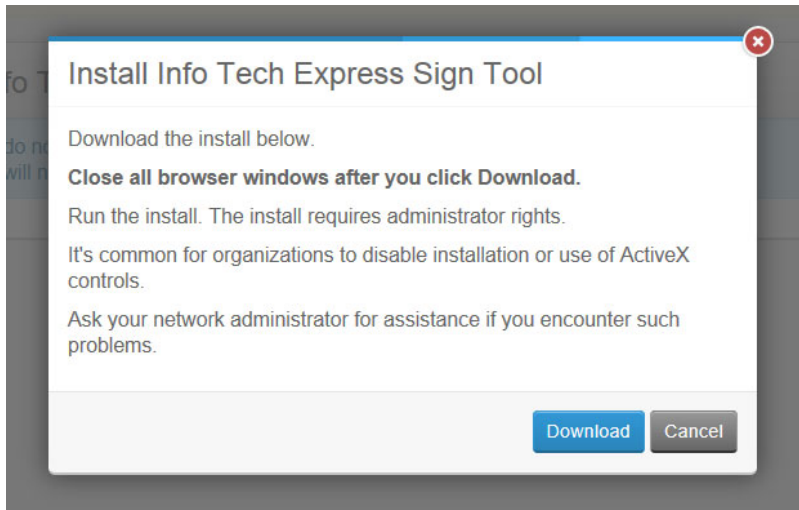
Figure 5–6. Infotech Sign Tool Instructions

Follow the instructions to install the Sign Tool utility.

6. Subscription Payments

The Payments page is where you would manage your credit card information and payment options when you subscribe to a paid service.
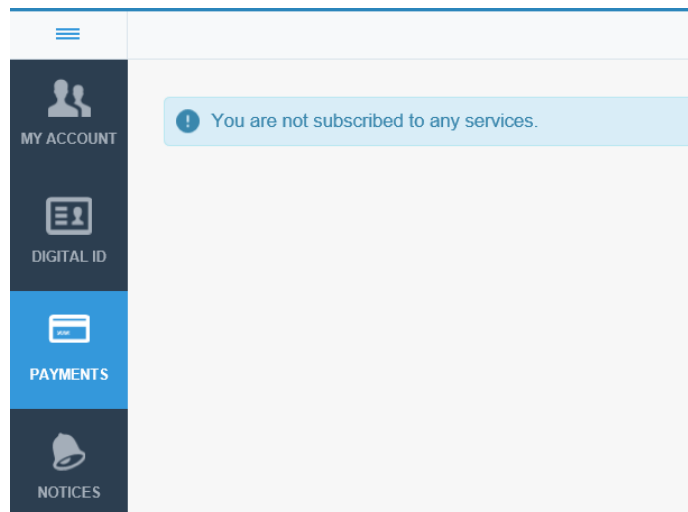
Figure 6-1. Payments Page Without Subscription

The page remains empty unless you subscribe to a paid service.

6.1 Bid Express Payments

There are two ways of paying for the Bid Express service: Monthly Subscription and Pay as you go.

With the Monthly Subscription method, you can respond to an unlimited number of solicitations. The Bid Express service sends convenient email notifications

for each solicitation selected for bidding. You can also opt to receive additional email notifications from the agency's home page about posting and withdrawals of solicitations. Once you select a solicitation for bidding, you can submit a bid even if your subscription ends before the bid deadline. You will be billed each month on the day you start your subscription.
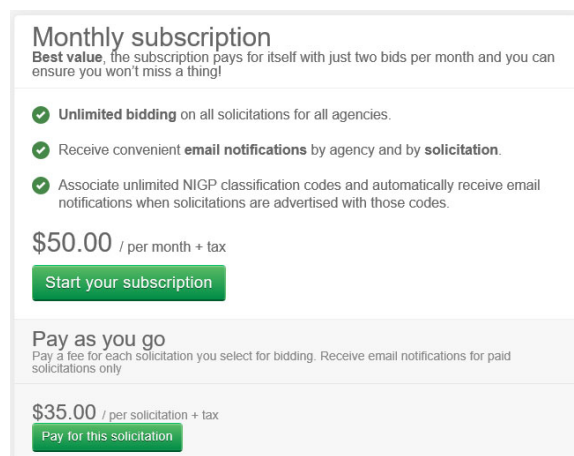
The Pay as you go method charges a fee each time you select the opportunity to bid on a solicitation. This option includes access to email notifications for the paid solicitation only.

6.1.1 Getting a Subscription

You can get a monthly subscription to the Bid Express service after logging in. Click UNLOCK FULL ACCESS on either the Home page or the My Profile page. The Bid Express service takes you to the Purchase Details page.

You can also begin a subscription or pay for the solicitation when you select the solicitation and click SELECT FOR BIDDING. Select either START YOUR SUBSCRIPTION to start a monthly subscription or select PAY FOR THIS SOLICITATION to pay for solely the one solicitation.

The Bid Express service displays the purchase details for each option.

Figure 6–2. Subscription Options

6.1.2 Purchase Details

When you purchase a service subscription, you are brought to the Purchase Details page. This displays the product, service, and description of your purchase, along with the monthly amount and the date through when your subscription is paid.

If you've already entered a credit card to pay for a previous service, click the button to pay with the card on file or click to pay with a new card.
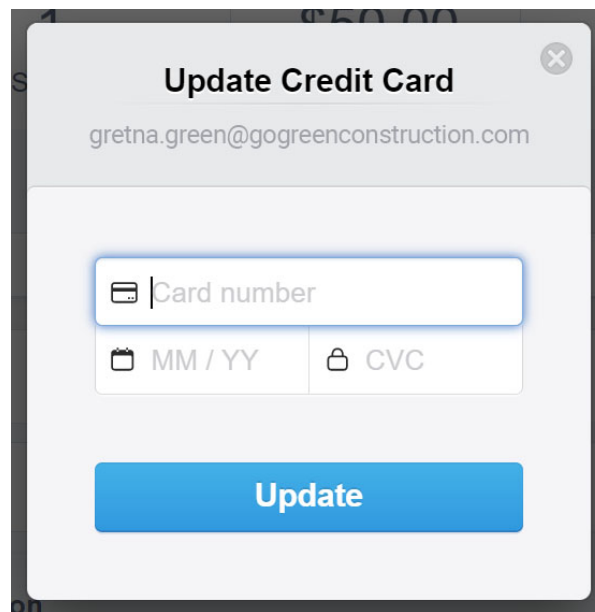
Figure 6–3. Purchase Details Page

Enter your credit card information and click the payment amount. The service checks the card to approve the payment and then returns you to the service.

6.1.3 Late Payments

If you have not paid for your monthly subscription, you will not be able to bid on a solicitation in the Bid Express service. If your payment has been denied, it could be because the credit card has expired.

You will be given the option of paying per solicitation or purchasing a monthly subscription.

6.2 Credit Card Information

Once you enter your credit card information to pay for services, you can update it at any time.

1. Click **My Account** from the Global Navigation menu in the upper left corner if you are not already there.

2. Click **Payments** in the side menu.

3. Click UPDATE CREDIT CARD.

4. Enter your credit card information in the Update Credit Card fields.

5. Click UPDATE.

The service updates your credit card and returns you to the Payments page.

6.3 Cancel a Subscription

You can cancel a service to which you are subscribed. Your subscription will remain active until your billing date.

1. Click **My Account** from the Global Navigation menu in the upper left corner if you are not already there.

2. Click **Payments** in the side menu.

3. Locate the service in the list and click Unsubscribe for that service.

4. Click OK in the unsubscribe confirmation window.

The service displays the canceled subscription and indicates the date through which it is paid.

7. My Profile Tab

The MY PROFILE tab in the Bid Express service contains your Bid Express subscription information and a way to manage your National Institute of Governmental Purchasing (NIGP) codes.

You will also see the names and roles of employees with Bid Express accounts. Only managers can change the roles of the users. It is recommended that every business have at least two managers.
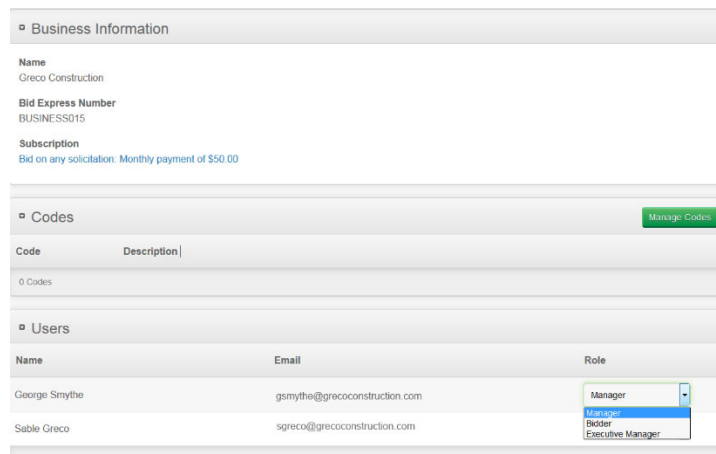
Figure 7-1. My Profile Tab

7.1 NIGP Codes

You can add National Institute of Governmental Purchasing (NIGP) codes to your profile if you have a monthly subscription to the Bid Express service, if the

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agency sponsors free notifications for vendors, or if the agency sponsors solicitations. You will receive an email if an agency (or the agency of a sponsored account) posts a solicitation that includes your selected codes.

7.1.1 Add Codes

1. Go to the MY PROFILE tab if you are not already there.

2. Click MANAGE CODES in the Codes section. The Bid Express service displays the Manage Codes window.

3. Enter the code class in the Choose a class field or click the arrow to select the class from the list.

4. Enter a code in the Choose a code field or click in the field to select the code from the list.

5. Keep entering codes for the selected class until you are finished.

6. Click SAVE when all codes have been added.

7. Repeat the process to add more classes and codes.
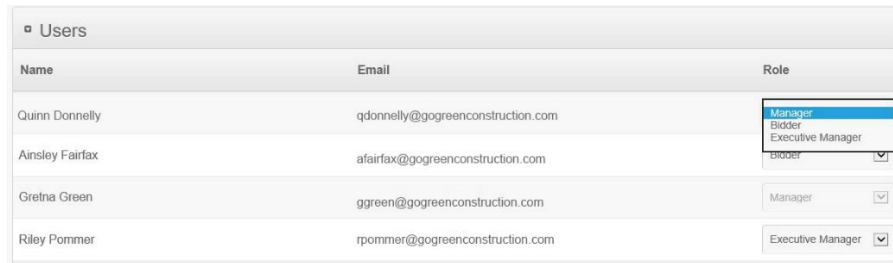
The NIGP codes will be added to your business.

7.1.2 Delete Codes

1. Go to the MY PROFILE tab if you are not already there.

2. Click the X for the code you wish to delete.

3. Click OK in the Delete Confirmation window

7.2 Users

As the manager of a Bid Express account, you have the ability to assign roles to members of your business. These roles are different than the roles assigned for account activation.

Figure 7–2. User Roles

Each role has its own security and available accessibility throughout the Bid Express site.

Role	Abilities
Manager	Can assign roles, purchase subscriptions, edit business information, select a solicitation for bidding, create, edit, withdraw, or submit bids. This role must have a Digital ID if working with owner–agencies that require Digital IDs.
Bidder	Can select a solicitation for bidding, create, edit, withdraw, or submit bids. This role must have a Digital ID if working with owner–agencies that require Digital IDs.
Executive Manager	Has read–only access to everything, but cannot edit anything.

1. Click the MY PROFILE tab if it is not already selected.

2. Scroll to the User section. Use the drop–down list to select the appropriate role for each employee.

Note: If you created the business, you are automatically assigned the role of Manager. Your role cannot be changed unless it is by another manager. If you are invited to join the business, you are automatically assigned the role of executive manager. The manager can change your role.

infotech®

Bid Express®

Vendor Training Guide

October 2020

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www.infotechinc.com

infotech®

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feedback@bidexpress.com

Contents

8. Introduction

Welcome to the Bid Express® service.

Use the Bid Express service to submit bids or requests for information and win jobs, eliminating the expense and hassle of paperwork and travel. The service does all computations where extensions are used and alerts vendors to omissions, addenda and other requirements, producing virtually error–free bids.

The Bid Express service saves the time needed for preparing bids on paper and the travel time and expense involved in attending lettings and submitting bids in person.

Using your Internet browser, access the Bid Express website at www.bidexpress.com.
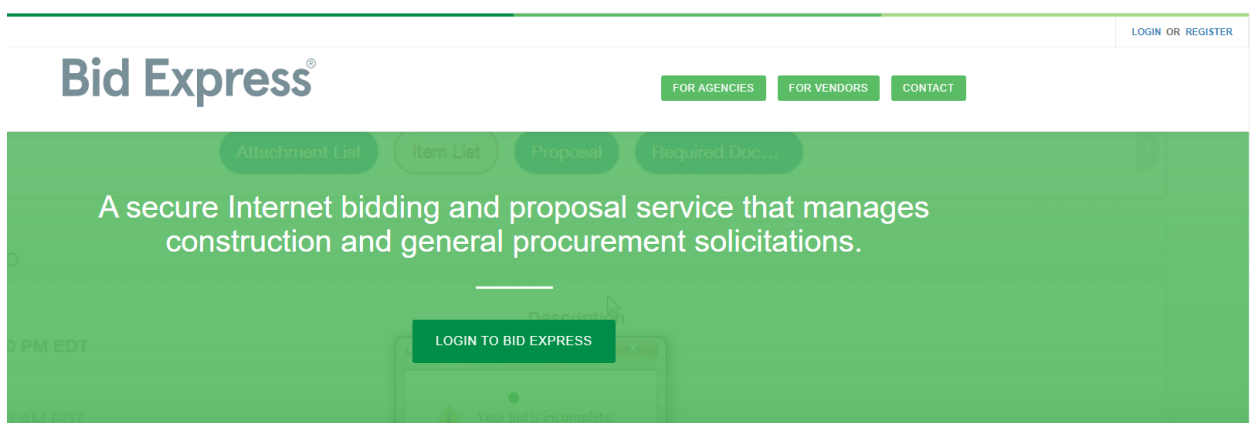
Figure 8–1. The Bid Express Login Page

8.1 Understanding the Bid Express Service

As a vendor, you can:

- Quickly search for opportunities from a variety of owner–agencies

- Prepare and send a sealed, secure Bid Express bid or respond to a request for proposal directly from your Internet browser

- Electronically verify bid bonds

- View bid–related documents online, including plans

- View apparent bid results as soon as they are posted

This information is provided to help you operate effectively and efficiently when using the Bid Express service.

8.2 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.
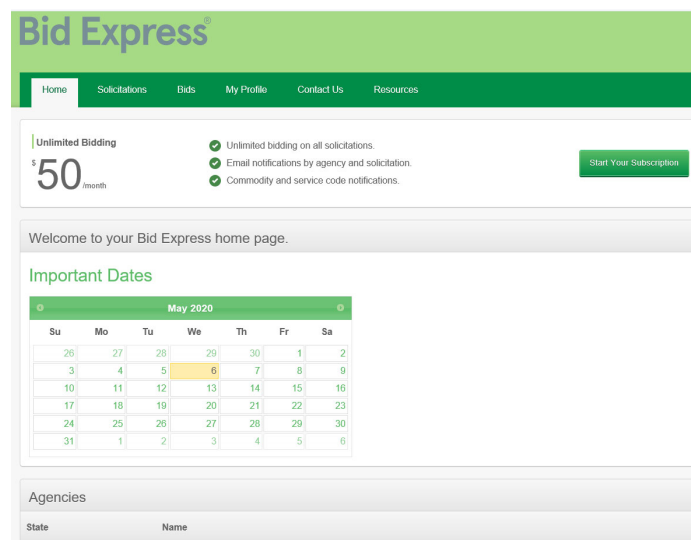
Figure 8–2. Agency Home Page

The Home page displays options for subscribing to the Bid Express service and a calendar of important dates.

You will also see list of agencies that have registered with the Bid Express service. Click on an agency name to see the agency's general information.

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.

Exercise 8–1

In the following exercise you will log on to the Bid Express service.

1. Go to http://www.bidexpress.com.

2. Click LOGIN.

3. In the Email field, type the email address you used when you registered for a Bid Express account.

4. In the Password field, type your password.

5. Click the LOG IN button.

8.3 Subscriptions and Payment Information

If your business has not yet signed up for a monthly subscription to the Bid Express service, you will see the different subscription options when you log in to your Bid Express account.

For information on monthly subscription or pay–as–you–go options, please see the Subscription Payments chapter of the *Bid Express Registration Guide*.

8.4 Infotech® Digital IDs and Electronic Signatures

All solicitations or requests for proposal require either a Digital ID or an electronic signature for verifying authorization to submit the bid. This will be indicated with a banner at the top of the solicitation's General Info section.

If the owner–agency set the solicitation to require an electronic signature, you will need to enter your name when you submit your bid.

If the owner–agency set the solicitation to require a Digital ID, you must have a Digital ID created and approved before submitting the bid. If your ID was created before October 2020, you must also install the Sign Tool. The Bid Express service will display a message if you need to complete either of these steps.

You should submit all requests for Digital ID approval and activation no fewer than seven days in advance of the anticipated need to use the Digital ID. If you need help, please see the *Bid Express Registration Guide* or contact customer support.

8.5 Help

After logging in, click Help in the lower right corner to access the knowledge center 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.

8.6 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.
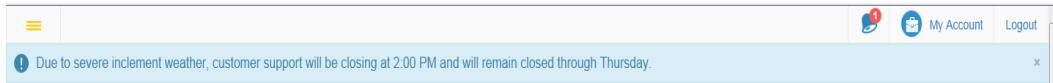
Figure 8–3. Notices

Click the Bell icon to open the Notices page.
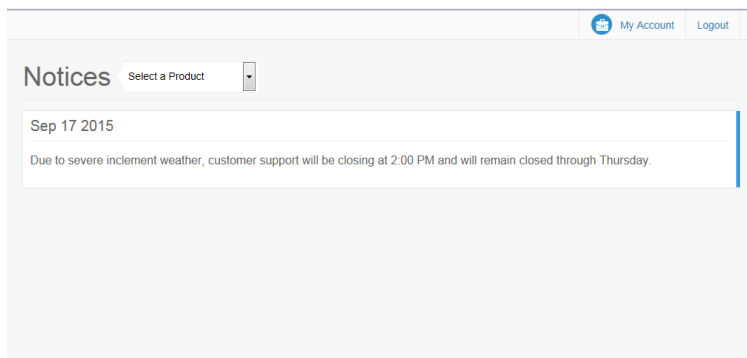
Figure 8–4. Notices Page

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

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

9. Solicitations and Responses

When you are finished with this section, you should be able to:

- Sort the solicitations by number or deadline

- Search for a solicitation

- View solicitations details

- Add yourself to the plan holder list

- Select a solicitation for bidding

Unless otherwise noted, the actions you take when preparing a bid for a solicitation can also be taken when you prepare a response to a Request for Proposal (RFP).

The Bid Express service is designed for you to view solicitations before deciding upon which ones to bid. Although many owner-agencies have different workflow and business rules, there are many common functions that apply to all participating owner-agencies.

Click the SOLICITATIONS tab to view available solicitations.

9.1 Sorting and Searching

When owner–agencies advertise a solicitation, it displays on the Solicitations tab.
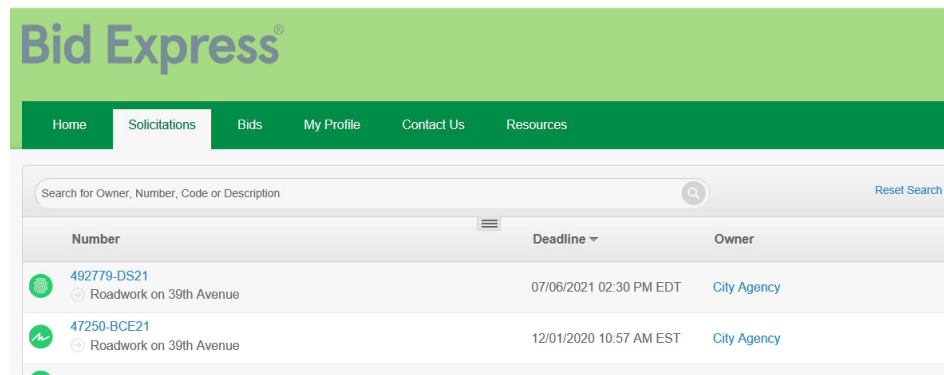
Figure 9–1. Solicitations Tab With Advanced Search

The solicitation number and description are displayed, as is the deadline and the name of the owner–agency that created the solicitation.

The Free tag indicates no subscription to the Bid Express service is needed to bid on the solicitation.

Solicitations can be sorted by the solicitation number or deadline. In addition, you can use the simple search feature to filter solicitations by owner–agency, solicitation number, NIGP codes, and description.

Use the advanced search by clicking the three horizontal lines under the Search field. You can search by a deadline date range and by the status of a solicitation. The advanced search builds on any terms entered in the simple search field. For example, if you enter an owner in the simple search field and then use the advanced search to find open solicitations, the Bid Express service will display open solicitations only for the owner in the simple search field.

Click Reset Search to clear all the search criteria and return to the full list of solicitations.

▣ Exercise 9–1

In the following exercise you will sort the solicitations by number and deadline, filter by owner–agency, and search for solicitations in a date range.

1. Log in to the Bid Express service.

2. Select the SOLICITATIONS tab.

3. Click <u>Number</u> at the top of the solicitation list.

4. Click <u>Deadline</u> at the top of the solicitation list.

5. Enter the name of an owner in the Search field and press ENTER.

6. Click the three horizontal lines under the Search field.

7. Enter the beginning date and time of the deadline date range in the first Deadline Date Range field.

8. Enter the end date and time of the deadline date range in the second Deadline Date Range field.

9. Click SEARCH.

9.2 Agency Notifications

When you are on the SOLICITATIONS tab, click a name in the Owner column to navigate to the Owner–agency's home page to view general information, standard documents used by that owner–agency, a list of upcoming solicitations, and a list of closed solicitations.

You can receive email notifications whenever the selected owner–agency advertises or withdraws any solicitation. You can subscribe to notifications only if you have a monthly subscription to the Bid Express service, if the agency sponsors free notifications for vendors, or if the agency sponsors solicitations. Only those in your

business who have specifically signed up for an owner–agency's notifications will receive them.

Click the enable notifications link to subscribe.

To remove yourself from the notifications, select the disable notifications link.

When you select a solicitation for bidding, you and all approved members of your business automatically receive notifications when:

- An amendment is issued

- The date is changed for the questions and answers deadline

- A solicitation is withdrawn

- A withdrawn solicitation is re–advertised

- Your bid or response is submitted, withdrawn, or resubmitted

- Public documents are posted for a closed solicitation

- Apparent bids are posted
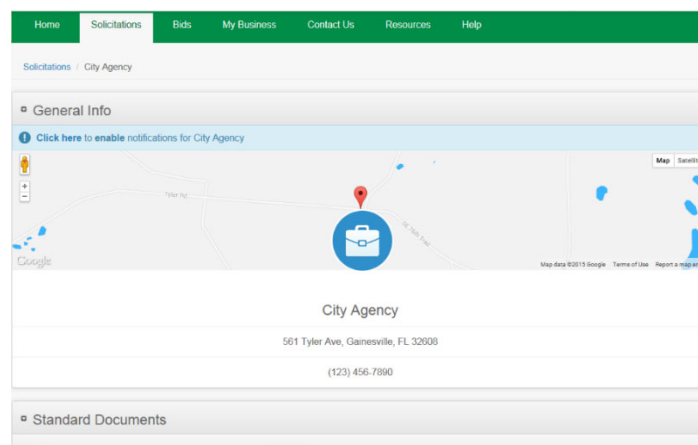
Figure 9–2. Enable Owner–agency Notifications

9.3 Bidding

Select that solicitation number from the list on the SOLICITATIONS tab to see the solicitation details page.

Figure 9–3. Solicitation Details

Review the details of the solicitation and whether it uses a Digital ID or electronic signature. You can add yourself to the plan holders list if you wish. This enables you to get plan holder notifications for this solicitation without selecting it to bid. You will not see this option if the agency adds users who download attachments to its plan holder list. The owner–agency may post the plan holders list at any time.

The owner–agency may also give you the option to ask questions about the solicitation before selecting it for bidding (see Section 10.4).

Once you decide you want to bid on the solicitation, click SELECT FOR BIDDING or RESPOND. From there, you will be taken to the payment options if you have not yet subscribed to the Bid Express service (please see the Payments chapter of the *Bid Express Vendor Registration Guide*). If you have, the solicitation moves from the SOLICITATIONS tab to the BIDS tab.

If you do not see the SELECT FOR BIDDING or RESPOND button, then the solicitation has been restricted by the owner–agency to only invited vendors.

Once you select and pay for a solicitation for bidding, you can submit a bid even if your subscription ends before the bid deadline.

Exercise 9–2

In the following exercise you will view the details of a solicitation, add yourself as a plan holder, and select the solicitation for bidding.

1. Log in to the Bid Express service if necessary.

2. Select the SOLICITATIONS tab.

3. Click the number of the solicitation you chose for bidding.

4. Click ADD TO PLAN HOLDER LIST.

5. Read the solicitation details, scrolling down the page as necessary.

6. When you are finished, click SELECT FOR BIDDING.

   📄 **Note:** If this is the first time you've bid on a solicitation, you will have to pay for a Bid Express subscription or select the Pay as you go option.

10. Entering Bids or Responses

When you are finished with this section, you should be able to:

- Open a solicitation

- Lock the solicitation header

- Enter unit prices and other bid components

- Ask the owner-agency a question

- Export and Import a Table or Item List

- Save a draft of your bid

- Export and Import Draft Bid

- Check the bid

- Submit the bid

Unless otherwise noted, the actions you take when preparing a bid for a solicitation can also be taken when you prepare a response to an RFP.

10.1 The Bids Tab

Once you've selected the solicitation for bidding, the Bid Express service moves it from the SOLICITATIONS tab to the BIDS tab and displays the solicitation details.

Any member of your business with the correct permissions can edit and submit bids that use electronic signatures.

Only members of your business that have approved Digital IDs can edit and submit bids that use Digital IDs. Because Digital IDs are stored on your computer, the user who selects the solicitation for bidding is the one who can edit and submit it. Other members can work on the bid and then export their work to the user submitting the bid.

Figure 10–1. Bid Details

📄 **Note:** Your bid details may look different from the one pictured here.

10.2 Bid Components

Once the solicitation has been opened, you need to enter values for each component. Enter item amounts, answer any solicitation questions, and fill out any required forms.

Click the LOCK icon under the Total field to keep the solicitation header visible while scrolling through your bid.

Enter the appropriate information for a component to complete your bid.

If the item list has more than 30 items, 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.

You can export tables and item lists in the solicitation to allow other members of your business to work on them or to use estimation software.

If there is no Quantity column, then the quantity of every item in that list is set to 1.

10.2.1 Grouped Fields

You may see a green plus sign displayed for some grouped fields. This means the fields can be duplicated. For example, if you need to add information for three subcontractors, click the plus sign for the group to duplicate those fields and continue adding subcontractor information. You can duplicate the fields up to 20 times. Each duplicated group is numbered sequentially starting at 1.

Delete a set of duplicated fields by clicking the red X for that group. You cannot delete the original group of fields.

10.2.2 Optional or Alternate Components

The owner–agency may mark any component as optional or alternate. Items in an item list can also be marked as optional or alternate. Such components or items have that indication in the section header. If a component is an alternate, then the owner–agency may award the component independently of the solicitation award. Alternate components may or may not be calculated as part of the bid total, depending on the owner's preference. This will also be indicated in the section header and there will be an alternate total at the end of the item list.

You do not have to bid on optional components. If you do, you must enter values for every part of the component. Each field in an optional component must either have a value entered or the entire component must be completely empty. Select the No Bid check box if you are not bidding on an optional component.

10.2.3 Vendor Component Entry

Some item lists and tables are designed so you can give information to the agency. For example, an agency may want to know what type of equipment you have and will include a table asking for this information as part of the solicitation.

These components do not include any information from the agency aside from the names of the fields that must be completed. Enter values in the fields like you would in any other component where information must be entered by the vendor. Vendor entry components are optional, but if you enter information in one field, then all fields in that row are required.

You can export tables and item lists in the solicitation in order to allow other members of your business to work on them or to use estimation software.

Click the ADD button to enter the requested information. Click the X for a row or item to delete it.

10.2.4 Envelope Components

The contents of any component marked as an envelope will be visible to the agency after the bid deadline but before the bids are opened.

🟩 Exercise 10-1

In the following exercise you will lock the solicitation header and enter values for the components in a solicitation.

1. Log in to the Bid Express service if necessary.

2. Select the BIDS tab.

3. Select the solicitation.

4. Click the LOCK icon under the Total field.

5. If any components or items are optional, decide if you wish to bid on them. If not, select the No Bid or Optional check box.

6. Click the component you wish to edit from the solicitation header.

7. For fields in an item list, click the field and enter the value. For fixed items or fixed labor, the price value will already be entered.

8. For forms, you will either have to select an option from a drop down list or click in the field to enter the value. Some fields may automatically populate with information already entered into the Bid Express service, though you can edit this information.

9. Download any attachments and read them thoroughly.

10. Upload any required document or explain why you are exempt.

11. For fields in a bid bond, click the field and enter the value.

12. For any other component, you will most likely have to click in the field to enter a value or select a value from a drop-down list. The differences in fields depend on how the owner-agency creates the solicitation.

10.3 Preference

The owner-agency may set a vendor preference discount as a way to implement policies regarding different business types, such as minority or locally owned.

If you own a type of business that matches the preference, select the check box for the type and enter any additional information. You may have to provide documentation to verify you selected the correct type.

The total bid amount displays the actual total amount of your bid. The subtotal displays the calculated amount of any discounts. When the owner-agency opens your bid, the Bid Express service displays if you are a preferred vendor and the total bid amount.

Figure 10–2. Preferences

10.4 Q & A

The owner–agency has the option of submitting the solicitation with a feature allowing vendors to ask questions. If this feature is enabled, you will see a Q & A section of a solicitation on the SOLICITATIONS tab or View Q & A in the heading of the General Information section of a solicitation selected for bidding. The Q & A section displays the deadline for asking questions and any remarks, such as an estimate of how long it will take to answer a question.

Click ASK A QUESTION on the SOLICITATIONS tab or VIEW Q & A on the BIDS tab and then click ASK A QUESTION. Enter your question in the Ask a Question field and click SUBMIT. The Bid Express service will send an email to all Bid Express users of your business verifying the question was submitted. In addition, the owner–agency will see notification of an unanswered question.

The owner–agency can publish any question so it is available to other Bid Express users. It does not have to answer the question in order to publish it. The authors of the question and the answer are not published.

When you ask a question, it is given the status of In Progress. When the owner–agency publishes the answer, the status changes to Published and you and the Bid Express users of your business will receive an email notification that the answer was posted. You will not receive an email if the question was published without an answer.

Click the link in the email to go to the question or open the solicitation and view the Q & A feature. The answer will be posted directly under the question.

10.5 Table or Item List Export and Import
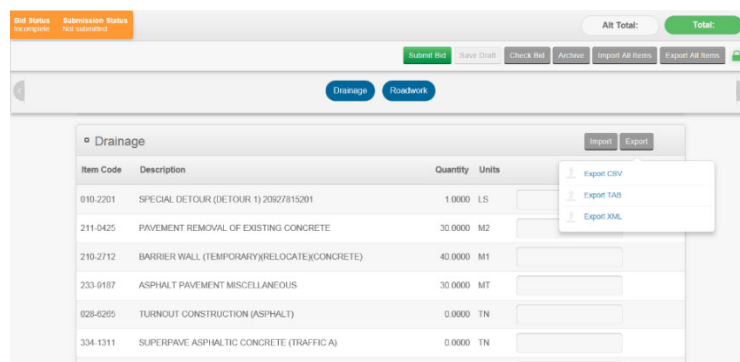
This function is available only on solicitations that use a Digital ID.

Even though you can submit the bid only from the computer on which it was created, you can export tables or item lists in the solicitation in order to allow other members of your business to work on them as well. This includes vendor entry tables and item lists. Unit prices for items are not exported as part of this process.

When you are finished adding your table or item information, you can import it back into the bid.

You can export the table or item list as CSV or tab–separated files. The item list can also be exported as an XML file. The Bid Express service lists each row and includes an ID number.

You can import the table or item list as CSV, tab–separated, or XML files. The ID number is used to match the rows when the table or list is imported back into the Bid Express service.

Figure 10–3. Item List Export and Import Options

10.5.1 Export All/Import All

You can use the Export All button to export all the item lists and tables in a solicitation. If you use this function, however, you must use the Import All button to import the lists and tables back into the solicitation.

All fields in the solicitation are overwritten when importing the items lists and tables, even if the field being imported has no information.

Exercise 10-2

In the following exercise you will export the table, add table information, and then import the table back into the Bid Express service.

1. Log in to the Bid Express service if necessary.

2. Select the BIDS tab.

3. Select the solicitation.

4. Scroll to the table or select the table from the header.

5. Click EXPORT for the table and choose the file format in which you want to export the table.

6. Save the file, then open it. You can change the file name if necessary.

7. Add table information and save the file again.

8. Log back in to the Bid Express service and select the solicitation, if necessary.

9. Scroll to the table.

10. Click IMPORT and select the file format.

11. Navigate to and select the table file and click OPEN.

12. Click SAVE DRAFT at the top of your bid to save the imported table.

Exercise 10-3

In the following exercise you export all the tables and item lists in the solicitation.

1. Log in to the Bid Express service if necessary.

2. Select the BIDS tab.

3. Select the solicitation.

4. Click EXPORT ALL in the upper right corner and choose the format for the exported file.

5. Save the file.

10.6 Save Draft and Check Bid

As you add information to your bid, it is a good idea to save a draft of your work. Click the SAVE DRAFT button at the top of your bid.

Use the Check Bid or Check Response function to ensure all required fields of your bid are filled in before it is submitted to the owner–agency. The Bid Express service highlights missing information. If you have a paginated item list, the Bid Express service highlights the page with the missing information.

Click the highlighted component title to see the related section of your bid. After you enter all the values, save your bid.

After you save your bid, it will be available on any computer (a copy of your Digital ID must have been imported to the computer for bids that require a Digital ID).
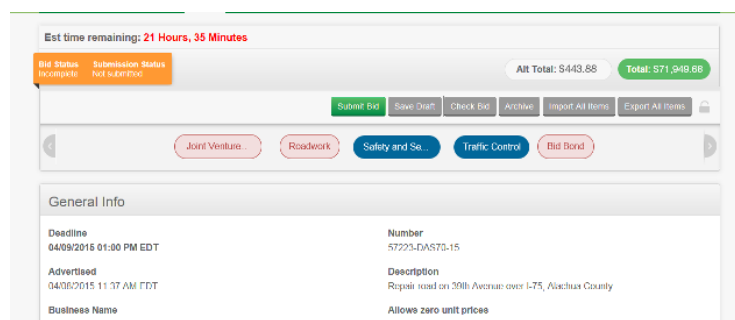
Figure 10–4. Check Bid With Errors

■ Exercise 10–4

In the following exercise you will check your bid, fix any errors, and save your bid.

1. Log in to the Bid Express service if necessary.

2. Select the BIDS tab.

3. Select the solicitation.

4. Enter values for each component of the bid. Leave one required field empty.

5. Click CHECK BID.

6. Find the field highlighted in red and enter a value for that field.

7. Click SAVE DRAFT.

10.7 Export Draft

This function is available only on solicitations that use a Digital ID.

Different members of your business can work on different components of the bid and export their drafts to the user who will be submitting the bid.

You can export the components separately to avoid overwriting the bid draft, and you can also rename the file.

You must have already saved your bid before you can export a draft file.
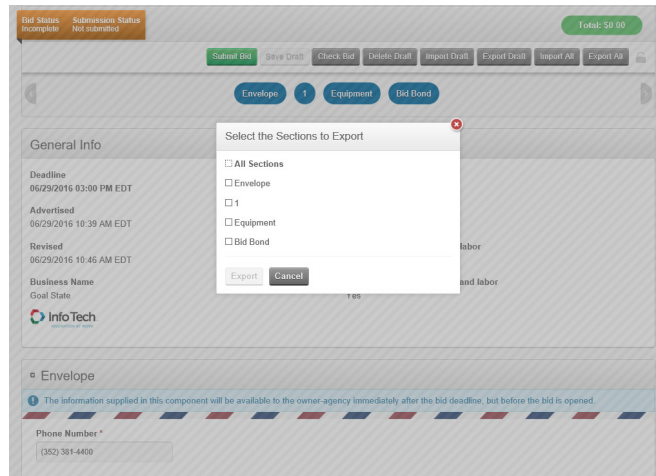
Figure 10–5. Export Draft Bid

After you export the draft, make the file available to the user who will be submitting the bid, such as through email or by placing it in a network location. Any member working on the bid will need the correct role in the Bid Express service and an active Digital ID.

If an amendment is issued for the solicitation, you will have to export a new draft of the components. This is required even if the amendment did not impact the components you were working on.

Exercise 10–5

In the following exercise, you will export a draft bid.

1. Log in to the Bid Express service if necessary.

2. Select the BIDS tab.

3. Select the bid.

4. If the EXPORT button is unavailable, save a draft of your bid.

5. Click EXPORT.

6. Select the components to export.

7. Click EXPORT.

8. Click the down arrow next to the SAVE button in the download banner and click SAVE AS.

9. Navigate to the location to where you want to save the draft and click SAVE.

10. Close the download banner.

10.8 Import Draft

This function is available only on solicitations that use a Digital ID.

Other members of your business can send you a file containing a draft of the bid components they worked on. This file should contain only the components you wish to import into your bid. The Bid Express service imports all fields in the file and will overwrite any information you may already have for those components in your bid.

You will not be able to import a draft file if the owner–agency has issued an amendment for the solicitation. A new export draft file will need to be created.

Exercise 10–6

In the following exercise, you will import a draft bid.

1. Log in to the Bid Express service if necessary.

2. Select the BIDS tab.

3. Select the bid.

4. Click IMPORT.

5. Select **Import Draft**.

6. Navigate to and select the exported bid draft file.

7. Click OPEN.

8. Click OK to import the draft.

10.9 Submitting the Bid or Response

Once your components are filled in and correct, it is time to submit your bid or response.

The Submission status bar in the top left corner of your solicitation displays the current submission status of your bid, from not yet submitted to the date and time it was submitted, and if it was complete. The color of the submission status changes depending on what actions have been taken or need to be taken for submission.

Orange	Your bid or response has not yet been submitted.
	Your bid or response has been submitted, but the submitted bid has changed. This may mean the agency has changed the solicitation and issued an amendment, or that you changed the content typed into your solicitation, both of which require you to resubmit your bid or response.
	If an amendment has been pushed to the solicitation and your business does not resubmit your bid with the changes, you risk being considered Non Responsive when the agency fetches your bid or response.
	The last submission was incomplete, meaning all required fields were not filled in prior to submitting. Click CHECK BID or CHECK RESPONSE to find the incomplete information.
Blue	A completed bid or response has been submitted at the posted date and time. If someone else in your business also submits bids, this may not be the time you submitted the bid.

Click SUBMIT BID or SUBMIT RESPONSE. If there are errors, such as an incomplete bid or an amendment which hasn't been addressed, the Bid Express service displays a warning. If there are no errors, the Bid Express service displays a confirmation message.
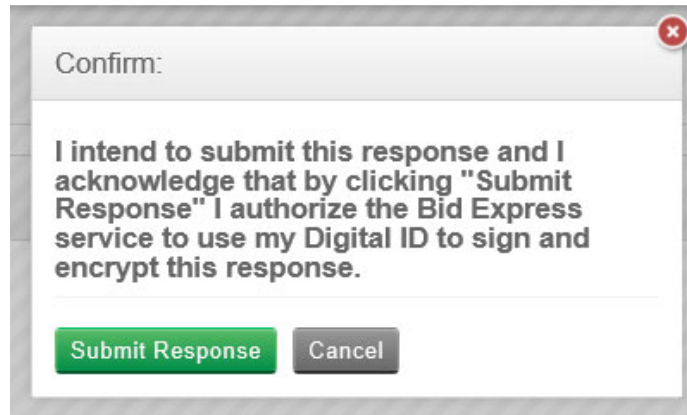
Figure 10-6. Submit Reponses Confirmation

If the solicitation requires an electronic signature, enter your name in the Electronic Signature field.

Click SUBMIT BID or SUBMIT RESPONSE to submit to the owner-agency. The Bid Express service also sends an email to you confirming your submission.

Exercise 10-7

In the following exercise you will submit your bid.

1. Log in to the Bid Express service if necessary.

2. Select the BIDS tab.

3. Select the solicitation.

4. Click SUBMIT BID.

5. If the error message displays, click NO, fix the errors, and click SUBMIT BID again.

6. If prompted, enter your vendor signature.

7. Click SUBMIT BID in the confirmation window.

11. Withdrawals, Amendments, and Resubmitting Bids or Responses

When you are finished with this section, you should be able to:

- Withdraw your bid

- Know when an amendment has been posted

- Apply the amendment to your bid or change your bid

- Resubmit your bid

Unless otherwise noted, the actions you take when you submit a bid for a solicitation can also be taken when you submit a response to an RFP.

You can change or withdraw your bid or response after it is submitted. The last bid submitted is the only one seen by the owner-agency. The owner-agency will not see your submission if it is withdrawn.

An owner-agency is able to update the solicitation any time before the deadline. When this happens, the Bid Express service notifies you through email that there is an amendment to the solicitation. You must update your bid with the amendment in order for it to be complete.

If there is an amendment to the solicitation, the Bid Express service displays an exclamation point next to your bid and changes the status inside the bid to Incomplete

or Submitted Bid (or Response) is Out of Date. Bids that do not have all the amendments applied will be marked as out of date or non responsive when the bids are downloaded by the owner-agency.

Figure 11-1. Amendment Notification

The Bid Express service automatically applies the amendment when you open your bid or response.

Figure 11-2. Amendment Notice

The Bid Express service lists the changes that were made by the owner-agency. If you cannot find them, use the Check Bid or Check Response function to locate the changed information.

Update your bid and resubmit it.

Exercise 11−1

In the following exercise you will withdraw your bid.

1. Log in to the Bid Express service if necessary.

2. Select the BIDS tab.

3. Select the solicitation.

4. Click WITHDRAW BID.

5. Click OK in the withdraw confirmation window.

Exercise 11−2

In the following exercise you will resubmit your bid.

1. Log in to the Bid Express service if necessary.

2. Select the BIDS tab.

3. Select the solicitation.

4. Make any changes to your bid.

5. Click SUBMIT BID.

6. If the error message displays, click NO, fix the errors, and click SUBMIT BID again.

7. If prompted, enter your vendor signature.

8. Click SUBMIT BID in the confirmation window.

12. Apparent Bids or Responses

When you are finished with this section, you should be able to:

- Know when apparent bids have been posted

- View the apparent bids

- View Bid Tab reports

Unless otherwise noted, the actions you take when you submit a bid for a solicitation can also be taken when you submit a response to an RFP.

12.1 Apparent Bids

An owner-agency can post the apparent bids or responses once the solicitation deadline has passed and the bids have been opened. If you've selected the solicitation for bidding, the Bid Express service sends an email to you stating this information. You can also see the apparent bids by accessing the solicitation from the Bids tab.

Manually-entered bids are listed first, followed by bids submitted using the Bid Express service in the order in which they were opened. The agency has the option of posting non-responsive bids and alternate totals.

If you wish to see the apparent bids of a solicitation that you did not select for bidding, select the agency that posted the bid from your home page. The Bid Express service opens its general information page. Scroll to the Closed Solicitation section and select the solicitation.

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 12–1. Posted Apparent Responses

■ Exercise 12–1

In the following exercise you will view apparent bids.

1. Log in to the Bid Express service if necessary.

2. Click the link in the apparent bids email or select the bid from the BIDS tab.

3. Scroll to the Apparent Bids section to view the apparent bids. Read any comments the owner–agency may have added to your bid.

12.2 View Bid Tab Reports

You can view a solicitation's bid tabulations if the owner–agency has posted it. If you bid on the solicitation, you can access the report from both the Bids tab and the Home tab. If you did not bid on the solicitation, it can be accessed only from the Home tab.

You can also access the report from the Closed Solicitations section on the owner–agency's Information page. Select the Home tab and select the agency to access its Information page.

Exercise 12–2

In the following exercise, you will view the Bid Tab report for a solicitation on which you bid.

1. Log in to the Bid Express service if necessary.

2. Select the bid from the BIDS tab.

3. Scroll to the General Info section and click REPORTS.

4. Select the report. The types of reports will differ depending on what the owner–agency posted.

5. Print a copy of the report or export the report in to an Excel spreadsheet.

13. Logging Out of the Bid Express Service

When you are finished with this section, you should be able to:

- Log out of the Bid Express service

When you are finished using the Bid Express service, it is a good idea to log out.

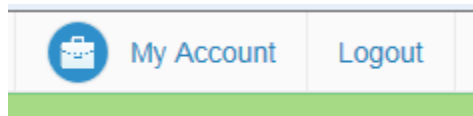Click <u>Logout</u> in the upper right corner of the screen.

Figure 13-1. Logout Icon

The Bid Express service logs you out and displays the Log In page.

![icon] Exercise 13-1

In the following exercise you will log out of the Bid Express service.

1. Click <u>Logout</u> in the upper right corner of the screen.

Logging Out of the Bid Express® Service