Expedite Bid Letting Process

User Documentation

5/2003 (rmr)

1) To open, double-click on Expedite Entry 5.0a icon or select Start/Programs/Expedite/Expedite Bid 5.0a
2) Click on Open icon or select File/Open
3) On the Open Proposal window, navigate to find '\\0501coitd1\const\groups\bidlet\(current month)\(our proposal#)' - DEFAULT. You will see all .ebs proposal files for the current letting listed. Ex: 22OctA93 is the file for Oct 22 letting, Proposal A93.
4) Select the proposal that you will be working with.
5) The 'Select Bidder Id' window will display. Enter the Bidder's Id (ex: B024) shown on the bid book in all CAPS. If the Bidder's Id does not show anywhere in the bid book, contact Rosa G. to verify Bidder's Id. On this window you will also see an option to 'load previously saved bids'. Leave this checked. If you should later need to correct errors for this Bidder, for this Proposal, that input file can be retrieved.
   NOTE: Previously entered Vendor data is saved for retrieval in a temporary file on your PC. This does NOT refer to the file that will be saved for transfer, but a copy of the input file.
6) If you have any doubt that you have selected the correct proposal number or entered the correct Bidder's Id, on the left side of the Expedite screen, click on the topmost file displaying the file name. Verify that it is the correct Proposal Number and Bidder Id you are working with. If you have mistakenly entered the wrong Bidder Id, click the red 'X' icon and the Bidder Id screen will display. When you enter the new Bidder Id, if you have previously entered any data, that data will not be saved. If you have mistakenly selected the wrong Proposal #, click the Open file icon and the file list screen will display. When you select the new file, if you have previously entered any data, a pop-up screen will ask if you want to save changes, select NO.
7) Click on Tools/Options.
   On Misc Tab – all options should remain checked for 'Data Entry Option', 'Data Load Options' and 'Miscellaneous'. For 'Price Mismatch Warning Sound', select Speaker Beep.
   On File Names tab – enter the following:
   Load – \\0501coitd1\const\groups\bidlet\(output file name)
   Joint - \\0501coitd1\Const\groups\bidlet\joint
   Error – \\0501coitd1\const\groups\bidlet\(output file name)
   DBE – \\0501coitd1\Const\groups\bidlet\dbe

   The Load and Error file name should always match and the output file name should reflect the file name of the type of proposal plus your Id number. (Ex: RAAPS09 or SAAPS09).

8) Select ‘Schedule of Items’. The details of the Proposal will display. Enter the Bidder’s Unit price, then Enter. Expedite will calculate the extended price. Enter the Bidder’s Extended price below the calculated price. Be sure to enter the Extended price from the Bidder’s book, do NOT reenter the Expedite calculated price. If any price does not include decimal amounts, you can enter the dollar amount and Expedite will format the amount to x.00. If the amount does include a decimal amount, you must enter that decimal amount. If the Extended prices do not match, you will receive an audio signal of the error. If it is a keypunch error, correct your error at that time. As the Extended prices are entered, Expedite calculates the Section Total at the top of the screen and the Proposal Total at the bottom of the screen. Continue to enter all Unit and Extended prices.
9) When you have completed entering all bid lines, select Tools/Check Bid. If any lines are in error, the line number will be identified on a pop-up screen. If the errors are keypunch errors, correct your input and again select Check Bid. If the errors are due to the Bidder’s extended price not matching Expedite calculated price, do NOT change the Bidders’ price. Enter the price exactly as it is in the book and place a visible sticky note on the total page of that book. Although this will be a known error, it will be corrected in Trns*Port. If all entered data matched the calculated data, the icon on the left of the screen for Schedule of Items will turn green. If there are errors, the icon will remain red. You will also see a ‘Misc. Error: Required fields not entered in Misc. Data Screen’. This error is OK to accept. It refers to information that will already be included in the Bidder’s book.
10) Click on Save icon <u>or</u> select File/Save.
11) To continue working with the same Proposal #, select File/Open to select the same Proposal File and repeat from Step 5 above for each Bidder of that Proposal.
12) When you have completed entering bids for all Bidders of the same Proposal, notify Construction IT.
13) To continue entering data for a different Proposal #, repeat from Step 2 above. Remember, you will have to change the output file name when you are entering different types of proposals. (Ex: SAAPSxx, RAAPSxx or MAINTxx).

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Step Processing

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- The day before a Bid Letting, get a copy of the electronic bids from Mary Roane (IT section) and a copy of all proposals from Rosa Grant (Estimating Section) for further reference.
  Rose Roberts (IT Section) creates a separate folder for each monthly Bid Letting and Mary R. loads the proposals into this folder. Check that this has been done the day before the bid letting.
  Location: '\\0501coitd1\const\groups\bidlet\(letting file name)'
  File Name Example: '21MayLetting'
- On the day of Bid Letting, bids are read (usually in the Main Building Auditorium) and Mary R. enters the data online. After the reading, the bid books are then collected by the Contracts Section for further processing.
- Contracts Section then gives the books to Rose R. who verifies that books have been received for all bids on the listing and notes how many e-bids and manual bids have been received. This is for the purpose of verifying that all bid books are received back from data entry after distribution.
- The bid books are also reviewed for bids that have both e-bids and manual submission. If there is both an e-bid and a manual bid book and both bid totals are the same, the e-bid is accepted as entered and the manual bid book is not keyed. If the totals of the two are different, the manual bid book is keyed. A sticky note is placed on the book to notify the keyer whether the book is to be keyed or not. DO NOT write on the bid books for any reason.
- Bid books are then batched and distributed by Rose R. according to the proposal number. All bids for a given proposal will be keyed by a single keyer.
- Each proposal batch will have an attached batch sheet on which will be entered the proposal number and the keyer's id number. (See attached for list of keyer's ids and copy of batch sheet). If there is an error on any keyed proposal, the keyer's id will indicate who did the keying and that person can fix their error. The keyer's data file name will also indicate the keyer's id and whether the proposals are RAAPs or SAAPs. (ex: RAAP09.dat). (See attached for some common errors and the User Documentation).
- After 1-2 hours of keying, collect all proposals that are completed. These proposals data will be combined into one file and transferred (FTP) to Trns*Port. Do not transfer any keyed single bid books unless all books for that proposal have been keyed. Do not split a proposal batch.
- All keyed files can be found at the Network location noted above. To work with these files, you will need to open them in Notepad. To open, right-click on the

.dat file and select 'Open With/Notepad'. If you double-click on the file, it will open in 'Patch', an Expedite product, as a default. Although Patch shows options to copy, this does not work successfully. In Notepad, highlight and copy only the data for the books you are currently working with. Create a new Notepad file called Done01.dat (Done02, Done03, etc...) and paste/append the copied data for each book to be transferred. Your final Donexx file will contain multiple proposals. Save the Donexx.dat file in the same location as the keyed files.

- To transfer the Donexx.dat file to Trns*Port, log into Trns*Port/CIPE and select Tools/Transfer or select the File Transfer icon. You will need to be granted access to transfer data to the Mainframe. See Construction IT (Angie G.) for access.
    - In transfer window:
      Select: 'Send File to Host'
      PC File Name: Use browse to find
      \\0501coitd1\const\groups\bidlet\donexx.dat (This will stay as a default for the next time you do this)
      Host File: **'hwyne22.bamspc.las.xtabdat'** (with single quotes)
      Transfer Type: FTP

  NOTE: Whenever you change your HWY password, you will also need to change it in FTP Options! Also in Options, File Type should be set to TEXT.

  Select: Transfer

  On completion of the transfer, you will get a status screen showing either a successful transfer or indicating errors. The only errors I have encountered are the PC or Host file name being entered incorrectly.
- Notify Rosa G. when the files have been transferred and give her a list of all the proposal numbers included in the transfer. She will process it in Trns*Port by executing options 5.1 and 5.3.
- Repeat this process to transfer about 3-4 small batches. This is done in small batches so that Rosa G. can continue working on the Trns*Port process while the keyers are still entering data. Always discuss this with Rosa G. and be flexible in the best timing/size of the transfers.

  Remember: Do not transfer any completed books unless all books for that proposal are completed since Rosa G. will not be able to do the Trns*Port processing until all books for that proposal are keyed.