This section provides information related to accessing and loading bid items through the Project Scheduling System (PSS).

2. Select Design under Office Information, as shown below.
3. Open the **Designer** tab and select the appropriate Design Engineer name from the **Projects Assigned To** drop down list, and **click OK**.

4. In the **Designer** dialog, select either the **Project Number** or **PIN Number** for which the bid items are to be processed, then **click** the **Bid Items** tab at the bottom.
If an error message appears, similar to that shown by the arrow below, review the problem with the Project Engineer.

5. When first setting up a project, the following dialog will appear. In the Specify Project’s Units area, select either **English** or **Metric** and click the **Continue** button.
6. After the above selections have been made, select either Add Division or Import Items, as shown by the arrows below.

7. **Import Items** allows the bid items and reference information for a project to be imported. This feature will import all divisions with all bid items and reference information for each division.

   If the **Import Items** option is selected, the following dialog will appear. From the *drop-down* selection list, select the **Project No.** of a project with similar bid items and click the **Import** button.

   After clicking the **Import** button above, the **Import?** message box with the *Are you sure ...* message will display:
After selecting Yes above, the Import message box with the ... successfully imported ... message will display, as shown at the right.

Click the OK button, shown above, and the following bid item dialog will appear with a tab for each Division that was imported, (as shown by the upper red arrow). If any imported bid items are no longer valid, they will display in red text (as shown by the lower red arrow).

Delete all bid items in the list that are no longer valid. A Delete Item? confirmation message will display, as shown at the right.

If bid items are imported from another project, there may also be divisions that are not needed. To delete a division, select the extra division by clicking the tab and click the Delete Div. button.

A Delete Division? confirmation message will display, as shown at the right. Click Yes or No to continue.
8. The **Add Division** option (shown several dialogs earlier) allows project bid item divisions to be created. Always use the default **Division Name** (changes in this field may cause program problems). The **Description** may be customized as necessary.

If the project does not require the **default bid items** shown below, the **check-box for Add Default Items** should be toggled off (un-checked □) unlike the checked box (☑) shown above.

<table>
<thead>
<tr>
<th>Item Number</th>
<th>Item Name</th>
<th>Unit</th>
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</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TRAFFIC CONTROL</td>
<td>LS</td>
<td>0.000</td>
</tr>
<tr>
<td>2</td>
<td>FLAGGERS</td>
<td>DAY</td>
<td>9999</td>
</tr>
<tr>
<td>3</td>
<td>PLOT CARS</td>
<td>DAY</td>
<td>9999</td>
</tr>
<tr>
<td>4</td>
<td>MOBILIZATION</td>
<td>LS</td>
<td>0.000</td>
</tr>
</tbody>
</table>

Click the **Cancel** or **Continue...** button to move on.

9. The **Bid Item** dialog, shown below, will display general project information and a tab for the added division, as shown by the arrow. If the **Add Default Items** box was checked, as shown above, the new division will include the default bid items, also shown below.
10. After a division is created, select the appropriate **Header** from the drop down list.

11. As stated earlier, use the Division Name that is supplied as a default name.

   Select the **Common Items Division** option, (shown at the right), unless there are alternate designs for the project.

   If there are no alternate design divisions, skip to #13 below.

12. **Alternate** items will be listed in separate divisions. If alternates are included, there should always be at least 2 alternates, such as PCC and HMA, which will then make a minimum of three divisions for the Office of Design.

   See the example to the right and below.

   The additional division shown at the right (Design 0210) is the division for Bridge Design.

As shown in the example at the right, the first alternate division (Division 3 Alt.) is for PCC Paved Shoulders and includes only the bid items relating to this alternate.
The second example alternate division (Division 4 Alt.) is for HMA Shoulders and includes only the bid items relating to this alternate.

When viewing the Common Items Division, as shown at the right with Division 2, the description will display Roadway Items, (unless it has been changed) and the Bid Item list will not include the bid items contained in the two alternate lists shown above.

13. To save changes click the Update Div. button, at the bottom of the Bid Item dialog.

 Changes will be lost if the Update Div. button is not clicked.
14. The default quantities for the Default bid items are as follows:

- Mobilization and Traffic control: 1
- Flaggers and Pilot Cars: as per proposal

Select and Delete unnecessary bid items.

15. A **Delete Item?** message will display, as shown at the right. Click **Yes** or **No** to continue.

16. To add other bid items, click the **Item List** button.
17. The **Bid Item List** window displays the complete list of bid items.

18. Select (highlight) bid items directly from the list and **click** the **Add Item** button. An item can also be added by simply **double-clicking** it. The color of the selected item will change to indicate it has been added.
19. To locate a bid item, search by Number or description (Desc).

To search by number, select the **Number** option, as shown below. Enter a portion of the bid item number in the text entry field and **click** the **Find** button.

![Search by Number](image1)

Only the items meeting the specific search criteria will be displayed in the list, as shown below with all **Item Numbers** containing the search text “2402”.

![Search Result](image2)

To search by description, select the **Desc** button shown below. Enter a portion of the bid item description in the text box and **click** the **Find** button.

![Search by Description](image3)

As shown below, only those items meeting the **backfill** description criteria will be displayed.

![Search Result](image4)

20. When done searching for and selecting items, **click** the **Return** button.
21. To modify the quantity, select the bid item, enter the quantity in the **Quantity** text box and **click** the **Modify** button to display and save the change.

22. Enter the value **1** for all items with lump sum (**LS**) units.

23. For generic unit bid items, (2599 items), select the bid item, type the description in the **Supp. Desc. 1** text box and **click** the **Modify** button to display and save the change.
24. For bid items that require “estimate reference (Note) information”, select the bid item and click the **Notes** button.

As shown below, click the **Import Default Note** button to display any pre-written note(s) that are available from the Project Scheduling System. Edit the Reference Note information as necessary, and click the **Update & Return** button to save the modifications.
Select the **Common Note** tab, as shown below, to display a list of the selected bid items. Select the bid items that require a common reference note, enter the "**Common Note**" text in the text entry field, and click the **Update** and **Return** buttons to save the modifications.

Bid items with **Reference Notes** will have a **Yes** in the **Note** column, as shown below.

**NOTE:** The default **Reference Information Notes** are maintained in the Project Scheduling System by the Design Automation Engineer in ODAC. Please contact ODAC for changes or additions to the default notes.

25. The Office assigned to the project is responsible for the proper order of the Bid Item Divisions, and that all bid item information is entered correctly by the Plan Turn-In date. The proper order will include the Lead Office as being listed first, followed by any others.

26. To reorganize (Re-Order) the Bid Item Divisions, click the **Re-Order** button at the bottom of the **Bid Item** dialog.
27. Select the division to change by using the Up and Down buttons to move to the correct division, as shown at the right. To save the order, click the Save Order button. Click the Return button when done re-ordering the divisions.

28. **Deadline for adding bid items:** For most projects, the bid items will be loaded into the Office of Contracts Transport (PES/LAS) System after midnight on Plan Turn-in Day. Emergency projects can be loaded during the work day or after midnight. After you are done adding items to the project, click the Send Items to Contracts button, as shown by the arrow below. This will actively load the program.

29. **Updating Bid Items** (during the two-week period after the Contracts Plan Turn-in date)
The following items are between the Office of Contracts and the Designer.

a. If it is necessary to make changes to the project, either the Office of Contracts will provide the change information to the designer, or vice versa.

b. Designers are responsible for updating the bid items to assure that the project information in the Transport (PES/LAS) System and PSS stays in sync.

c. During this two-week period, on the Bid Item form in PSS, instead of displaying the text Plan Turn-in, it will display Changes Due, as shown at the right. This date is the last day you can make changes to the project in PSS.

30. Click the Reports button (below) to display the Bid Item Reports dialog.
31. **Reports:**
From the **Bid Item Reports** dialog, select the desired **Process** (the type of report) and the **Division(s)** to be included in the report. *Click the Excel button.*

32. The Excel program will generate the report(s). See the following examples of a **Bid Item** report and an **Estimate Reference Information** report.

33. After the report(s) have been generated, *click the Return button, shown above on the Bid Item Reports dialog.*
34. When the Division(s) are complete, begin the program exit process by clicking the Return button, shown at the right,

then the Menu button,

and finally the Exit button.

When exiting PSS, an exit message will display, as shown at the right.

Click Yes or No.
## Chronology of Changes to Design Manual Section:

### 020J-082 Processing Bid Items through Project Scheduling

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
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<tbody>
<tr>
<td>7/2/2015</td>
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<tr>
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<td>Retitled section. Removed verbiage on page 15 stating the Office of Traffic and Safety has a four week period for making changes after Contracts Turn-in. Change Design Techs to Designer on page 2.</td>
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<tr>
<td>4/29/2011</td>
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<td>Added &quot;as per proposal&quot; for default quantity for bid item category &quot;Flaggers and Pilot Car&quot;.</td>
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<tr>
<td>6/30/2010</td>
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<tr>
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<td>Combined an older instruction document into this chapter, added information on alternate bid items, and updated the format.</td>
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<tr>
<td>4/15/2010</td>
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<tr>
<td></td>
<td>Document current DOT practices</td>
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<tr>
<td>1/29/2010</td>
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