

# PS&E and Project Letting



## PS&E

- Once the PS&E record is approved by Engineering support the Project Letting Record is auto-created.
- Auto-creation skips the Creation step in Project Letting and assigns to Contract Administration

Project Letting PRJLET0017 is sent to you for Waiting Advertisement.



Unifier Dev - Rose Heinlein, DeIDOT <DEV\_un  
To Heinlein, Rose

Reply
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Tue 2/7/2023 12:25 PM

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**Project/Shell: HEP SC, SR5 & Hurdle Ditch Road**

**Project Letting PRJLET0017 is sent to you for Waiting Advertisement.**

**From :** Rose Heinlein  
**Sent For :** Waiting Advertisement

**Source Name :** HEP SC, SR5 & Hurdle Ditch Road  
**Record No :** Project Letting PRJLET0017  
**Title :**

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For Oracle technical assistance <http://www.oracle.com/us/support>

# Reference Record Item-PS&E Records

**Project Letting**

Project Letting Documents

**Date Info**

Project Schedule  
ProjSched0001

Actual PS&E Submittal  
01/25/2023

Anticipated Advertisement Date  
02/07/2023

Anticipated Bid Period (Calendar Days)  
20

Anticipated Bid Opening Date  
02/27/2023

Anticipated Award Date  
03/09/2023

Anticipated Contract Execution Date  
02/21/2023

Status  
Requested\_To\_Award

Actual Advertisement Date  
02/08/2023

Bid Period (Calendar Days)  
0

Actual Bid Opening Date  
02/08/2023

Actual Award Date

Actual Contract Execution Date

**Reference Records**

Type	Ref No.	Title/User Name	Business Process	Status	Description	Created
PRJLET	0013		Project Letting	Requested_To_Av		02/07/2023
PSE	0005		PS&E Submission	Submitted		02/07/2023
	ProjSched0001		Project Schedule	Active		07/14/2023

## Required Actions

1. Select the 'Referenced Records' option
2. Double Click the PS&E Submission Record
  - The PS&E record that auto-created Project Letting will open.
3. Open the Documents Form in the PS&E record
4. Documents in this record are the final Statement versions.

PS&E Submission - Project No. T202000301 - Google Chrome

unifier-dev.deldot.gov/bp/studio/bp/record/open?ref\_mode=graph&bpRowId=16&project\_id=560308&model=uxpsesub&noLogRefreshOnSave=true&fromRefLog=...

**PS&E Submission**

PS&E Subm Documents

Actions View Comments by: All

Name	Description	Document Category
Attachments		

Folder Details

Name  
Attachments

Folder Path

Total: 1

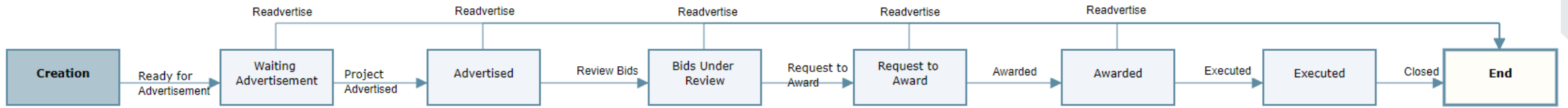
# Uploading Project Letting Documents

## Required Actions

1. Select the 'Documents' form
2. Select 'Add', then select 'Line Item'
3. Select the attach icon, then select 'Browse'
4. Select 'Browse' and select a document.
5. The document will appear as a line item.
6. Select 'Upload'
7. Select the document category from the dropdown list.
8. Select 'Save'

The screenshot shows the 'Project Letting' interface with a 'Documents' tab selected. A table lists document categories, with 'Line Item' highlighted. An 'Add' button is visible. A 'Line Item Details' panel on the right includes a 'Name' field, a 'Description' field with a 'Browse...' button, a 'Document Category' dropdown, and an 'Admin Only' section. An 'Upload Files' dialog box is open, showing a file named 'image size test.png' (575 KB) ready for upload. The dialog includes an 'Upload' button and 'Advanced Options' for file upload.

# Project Letting Workflow



WF-

- Creation\*
- Waiting Advertisement
- Advertised
- Bids Under Review
- Request to Award
- Awarded
- Executed
- End

\*Creation

A new record can be initiated if the project has been readvertised.

# Saving a Record

When adding dates to an Upper Form, you can leave the record and come back to make edits later by selecting the 'Save' option. After selecting 'Save' the record is stored in the drafts folder.

*Only the individual who has accepted the task can see the draft version.*

Business Process	Record Number	Title	Last Saved	Discussion
Project Access	uxpa-		02/28/2023 09:...	
Project Access	uxpa-		02/28/2023 09:...	
Project Access	uxpa-		02/28/2023 09:...	
Project Access	uxpa-		02/28/2023 09:...	
Project Access	uxpa-		02/28/2023 08:...	
Contracts - Sum...	CON-001	Rose Test	02/20/2023 03:...	

# Waiting Advertisement

## Required Fields

- Project Schedule- *select from the picker*
- Anticipated / Planned Dates
  - Advertisement Date- *select date*
  - Bid Period (calendar days)- *enter numeric value*
  - Bid Opening Date- *select date*
  - Award Date- *select date*
  - Contract Execution Date- *select date*
- Actual Advertisement Date- *select date*
- Readvertise- *Defaults to 'No', if readvertisement is needed, select yes and then select the Readvertisement reason.*

## Workflow Actions

- Advertised- *moves forward in the workflow*
- Readvertise- *terminates record*

**Project Letting** Accept Decline

Project Letting Documents

**▼ Date Info**

Project Schedule \*  
 Required

Actual PS&E Submittal

Anticipated Advertisement Date \*  
 Required

Anticipated Bid Period (Calendar Days) \*

Anticipated Bid Opening Date \*  
 Required

Anticipated Award Date \*  
 Required

Anticipated Contract Execution Date \*  
 Required

Are there addendums?  
 Yes  No

Status

Actual Advertisement Date \*  
 Required

Bid Period (Calendar Days)

Actual Bid Opening Date

Actual Award Date

Actual Contract Execution Date

**▼ Readvertise**

Is Readvertisement Required? \*  
 No  Yes

Readvertise Reason

Other Readvertise Reason

# Advertised

## Required Fields

- Are there Addendums- *select yes or no*  
*If Yes is selected, the Anticipated Bid Period (Calendar Days) and Anticipated Bid Opening Date are editable.*
- Actual Bid Opening Date- *select date*

## Modify/Edit if needed

- Actual Advertisement Date- *update date*
- Anticipated Award Date- *update date*
- Anticipated Contract Execution Date- *update date*
- Readvertise- *Defaults to 'No', if readvertisement is needed, select yes and then select the Readvertisement reason.*

## Workflow Actions



- Review Bids- *moves forward in the workflow*
- Readvertise- *terminates record*

The screenshot shows the 'Project Letting' interface with the following fields and values:

- Project Schedule:** PRJSCH-0001
- Actual PS&E Submittal:** (empty)
- Anticipated Advertisement Date:** 03/10/2023
- Anticipated Bid Period (Calendar Days):** 2
- Anticipated Bid Opening Date:** 03/24/2023
- Anticipated Award Date:** 03/31/2023
- Anticipated Contract Execution Date:** 04/21/2023
- Are there addendums?:** No (selected)
- Status:** Project\_Advertised
- Actual Advertisement Date:** 04/28/2023
- Bid Period (Calendar Days):** 0
- Actual Bid Opening Date:** MM/DD/YYYY
- Actual Award Date:** (empty)
- Actual Contract Execution Date:** (empty)
- Is Readvertisement Required?:** No (selected)
- Readvertise Reason:** (empty)
- Other Readvertise Reason:** (empty)

Buttons: **Accept** (highlighted in red), **Decline**, and a menu icon.

# Review Bids

Bids are reviewed. Documents are sent to Design PM for review and waiting on RTA.

## Required Fields

- None

## Modify/Edit if needed

- Actual Bid Opening Date- *select date*
- Anticipated Award Date- *select date*
- Anticipated Contract Execution Date- *select date*
- Readvertise- *select the readvertisement reason from the dropdown. If readvertisement is not needed, select 'None'*

## Workflow Actions



- Request to Award- *moves forward in the workflow*
- Readvertise- *terminates record*

The screenshot shows the 'Project Letting' interface. At the top right, there are 'Accept' and 'Decline' buttons, with 'Accept' highlighted by a red box. Below the header, there are tabs for 'Project Letting' and 'Documents'. The main content area is divided into several sections:

- Date Info:** Contains fields for 'Project Schedule' (PRJSC-0001), 'Actual PS&E Submittal', 'Anticipated Advertisement Date' (03/10/2023), 'Anticipated Bid Period (Calendar Days)' (2), 'Anticipated Bid Opening Date' (03/24/2023), 'Anticipated Award Date \*' (05/31/2023), and 'Anticipated Contract Execution Date \*' (04/21/2023).
- Are there addendums?:** Radio buttons for 'Yes' and 'No' (selected).
- Status:** A dropdown menu showing 'Bids\_under\_Review'.
- Actual Advertisement Date:** 04/28/2023
- Bid Period (Calendar Days):** 0
- Actual Bid Opening Date \*:** 04/28/2023 (highlighted with an orange box)
- Actual Award Date:** (empty)
- Actual Contract Execution Date:** (empty)

At the bottom, there is a 'Readvertise' section with a radio button for 'No' (selected) and 'Yes', and two text input fields for 'Readvertise Reason' and 'Other Readvertise Reason'. A 'Project Info' section is partially visible at the very bottom.



# Request to Award

## Required Fields

- None

## Fields that can be edited

- Readvertise- *select the readvertisement reason from the dropdown. If readvertisement is not needed, select 'None'*

## Workflow Actions

- Pending Award- *moves forward in the workflow*
- Readvertise- *terminates record*

Accept Decline ☰

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Project Letting
Documents

**▼ Date Info**

Project Schedule  
PRJSCH-0001

Actual PS&E Submittal

Anticipated Advertisement Date  
03/10/2023

Anticipated Bid Period (Calendar Days)  
2

Anticipated Bid Opening Date  
03/24/2023

Anticipated Award Date  
03/31/2023

Anticipated Contract Execution Date  
04/21/2023

Are there addendums?  
 Yes  No

Status  
Requested\_To\_Award

Actual Advertisement Date  
04/28/2023

Bid Period (Calendar Days)  
0

Actual Bid Opening Date  
04/28/2023

Actual Award Date

Actual Contract Execution Date

**▼ Readvertise**

Is Readvertisement Required? \*

No  Yes

Readvertise Reason

Other Readvertise Reason

> Project Info

> Admin Only

# Award

After receiving RTA, the record status is updated to Awarded.

## Required Fields

- Actual Award Date- *select date*

## Fields that can be edited

- Readvertise- *select the readvertisement reason from the dropdown. If readvertisement is not needed, select 'None'*

## Workflow Actions

- Executed- *moves forward in the workflow*
- Readvertise- *terminates record*

Project Letting

Accept
Decline
☰

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Project Letting
Documents

**▼ Date Info**

Project Schedule  
PRJSCH-0001

Actual PS&E Submittal

Anticipated Advertisement Date  
05/10/2023

Anticipated Bid Period (Calendar Days)

Anticipated Bid Opening Date  
05/24/2023

Anticipated Award Date  
03/10/2023

Anticipated Contract Execution Date  
04/21/2023

Are there addendums?  
 Yes  No

Status  
Pending\_Award

Actual Advertisement Date  
04/28/2023

Bid Period (Calendar Days)

Actual Bid Opening Date  
04/28/2023

Actual Award Date \*  
 Required

Actual Contract Execution Date

**▼ Readvertise**

Is Readvertisement Required? \*  
 No  Yes

Readvertise Reason

Other Readvertise Reason

> Project Info

> Admin Only

# Executed

## Required Fields

- Actual Contract Execution Date- *select date*

## Fields that can be edited

- Readvertise- *select the readvertisement reason from the dropdown. If readvertisement is not needed, select 'None'*

## Workflow Actions

- Closed- *ends the record, view only after this action*

Project Letting

Accept
Decline
☰

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Project Letting
Documents

**▼ Date Info**

Project Schedule  
PRJSCH-0001

Actual PS&E Submittal

Anticipated Advertisement Date  
03/10/2023

Anticipated Bid Period (Calendar Days)  
2

Anticipated Bid Opening Date  
03/24/2023

Anticipated Award Date  
03/10/2023

Anticipated Contract Execution Date  
04/21/2023

Are there addendums?  
 Yes  No

Status  
Award\_Executed

Actual Advertisement Date  
04/28/2023

Bid Period (Calendar Days)  
0

Actual Bid Opening Date  
04/28/2023

Actual Award Date  
03/16/2023

Actual Contract Execution Date \*  
MM/DD/YYYY Required

**▼ Readvertise**

Is Readvertisement Required? \*  
 No  Yes

Readvertise Reason

Other Readvertise Reason

> Project Info

> Admin Only

# Status

## Project Letting

Record No.	Actual PS&E Submittal	Anticipated Advertisement Date	Actual Advertisement Date	Anticipated Bid Opening Date	Bid Period (Calendar Days)	Actual Bid Opening Date	Anticipated Award Date	Actual Award Date	Anticipated Contract Execution Date	Status
PRJLET0001	01/25/2023	01/25/2023	01/26/2023		0		01/25/2023			ReAdvert_Reqd
PRJLET0002	01/25/2023	01/18/2023	01/26/2023		20	01/26/2023	02/07/2023			ReAdvert_Reqd
PRJLET0003	01/25/2023	01/18/2023	01/20/2023		30	01/26/2023	02/17/2023	01/27/2023	01/30/2023	Closed
PRJLET0004	01/25/2023	01/23/2023	01/27/2023	02/27/2023	20	02/28/2023	02/12/2023	02/28/2023		Closed
PRJLET0005	01/25/2023	01/25/2023	01/26/2023		10	01/31/2023	02/04/2023			ReAdvert_Reqd
PRJLET0006	01/25/2023	01/25/2023	01/26/2023		10	01/31/2023	02/04/2023			Project_Advertised



### Status

1. If a record is Readvertised the record status = ReAdvert\_Reqd
2. When records are completed the record status= Closed
3. Staus reflects the current stage in the workflow

# Creating a New Project Letting Record

ORACLE Primavera Unifier (Development) Rose Heinlein

Company Workspace T202000301 T12345678

DelDOT > M&O > T12345678

### Project Letting

+ Create 1

Record No.	Actual PS&E Submittal	Anticipated Advertisement Date	Actual Advertisement Date	Anticipated Bid Opening Date	Bid Period (Calendar Days)	Actual Bid Opening Date	Anticipated Award Date
PRJLET0002		02/09/2023	02/09/2023	03/02/2023	0	02/09/2023	02/09/2023
PRJLET0001		02/08/2023	02/09/2023	02/17/2023	0		02/17/2023

1. Select 'Create'