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

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Reference Record Item-PS&E Records

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.

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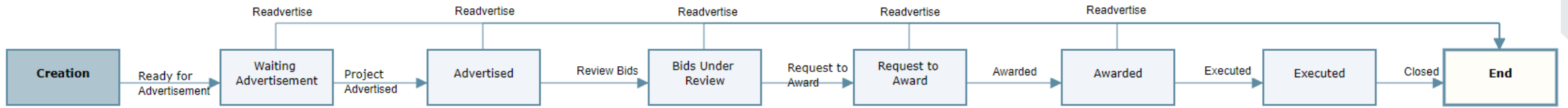# Uploading Project Letting Documents

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'

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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.

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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.

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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*

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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*

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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***

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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***

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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***

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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*

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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	01/30/202_	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

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Creating a New Project Letting Record

1. Select 'Create'

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