



QUICK REFERENCE GUIDE:

2.2 Generating Proposal Sections

Background:

The Proposal Sections and Items component allows you to organize the project items and categories into sections for bidding and to generate new proposal line numbers. In nearly every case, Proposal Users will have the system auto generate sections.

Roles:

Proposal User

Navigation:

Preconstruction > Proposal Overview > Proposal

Autogenerate Proposal Sections:

1. From the Proposal Summary component, click the **Sections and Items** quick link.
2. Expand the Proposal Sections and Items **Component Action Menu**.
3. Select **Auto Generate Sections**.
 - a. Auto generating proposal sections will pull each unique project category (that was not marked to combine with like categories) into matching proposal sections.
 - b. Any time a project item is added or modified after the proposal has been created, you must Auto Generate Sections again.
 - c. If you are advertising two projects with Basic Bid sections on your proposal, you must add the project IDs to the corresponding Basic Bid **Descriptions** to distinguish the sections on reports and for contractor's bidding (i.e. Basic Bid

– SFHWY00878). For proposals with additive alternates or multiple NTPs, uncheck the **Basic Bid** box for all but the actual Basic Bid section (or NTP 1 section for aviation projects).

4. Click **Save**.

Manually Generate Proposal Sections:

1. From the Proposal Overview component, click the **Sections and Items** quick link.
2. Enter the section ID/name in the **Section ID** field (00BB for basic bid, AA01 for additive alternative 1, NTP01 for NTP 1, etc. etc.).
3. Enter the section description in the **Description** field (Basic Bid, Additive Alternative 1, Notice to Proceed 1, etc.).
4. Click **Save**.
5. Click the Proposal Sections and Items **Component Action Menu**.
6. Select **Assign Items to Sections**.
7. Expand the Project Items list and mark the appropriate radio button to assign individual items to a section.
8. Click **Save**.

Proposal Items:

1. In the **Proposal Items** tab, review the Proposal Items for accuracy.
 - a. This is the bid schedule that contractors will see in Bids/Bid Express.
 - b. This screen is where items are marked as DBE (and the DBE Work Category chosen) to be included in the DBE goal. The person assigned this task varies from region to region. See QRG - *DBE Goal Creation*.

If you need further assistance please contact your Module Admin
Last Updated October 2023



QUICK REFERENCE GUIDE:

2.2 Generating Proposal Sections

- c. If you add new items to one or more of the projects on the proposal after you have generated sections, you must **Auto Generate Sections** again to make sure the new project items are transitioned to proposal items.

Proposal and Project Items

1. In the Proposal and Project Items tab, click the **Expand/Collapse** arrow for a proposal item to view the associated project items.
 - a. Each proposal item contains its project item or items. Roll Up items will appear under their proposal item. The number of project items contained within a proposal item is listed.

Next Steps:

Proposals must be valid before they can be included in a Letting. See QRG - *Proposal Validation*