

# Bid Reference Documents

## Prepare a Bid Reference Document for uploading

Convert the document into a pdf	Open original document > click File > Print > click the Printer Name drop-down menu > select Adobe PDF > in Acrobat Pro, click OK > click Print > In the Save As window, enter the file name according to the file name format listed under Document Title in the Metadata by Document section > Save
Compress the document using Acrobat Pro	Open the PDF document in Adobe Acrobat Pro > click File > Save As Other > Reduced Size PDF (middle left) > OK > Save As > In the Save As window, enter the file name according to the file name format listed under Document Title in the Metadata by Document section > Save
Secure the document using Adobe Acrobat Pro	Open the PDF document in Adobe Acrobat Pro > click View > Tools > Protection > click Restrict Editing (middle left) > enter eBIDS (case sensitive) as the password > click OK twice > In the Save As window, enter the file name according to the file name format listed under Document Title in the Metadata by Document section > Save
If necessary, bundle old bridge or "as constructed" drawing .tif and .pdf files into single PDF Portfolio	Open Adobe Acrobat Pro > click View > Tools > Pages > click Combine Files into PDF (middle left) > click the Add Files drop-down menu (upper left) > select Add Files > In the Add Files window, select the document > click Open > click Combine Files (bottom right) > click File > Save As > In the Save As window, enter the file name according to the file name format listed under Document Title in the Metadata by Document section > Save

## Add a Bid Reference Document to ODOT eBIDS System

Bid Reference Documents will typically be added by the Project Leader (PL) or the Local Agency Liaison (LAL) for their project. The PL or LAL can delegate responsibility to an assistant. If a delegated assistant can't see the **"Add New Bid Reference Document"** link on the left side of the screen, contact an ODOT eBIDS System Administrator to update their permissions.

### ODOT eBIDS System Administrators

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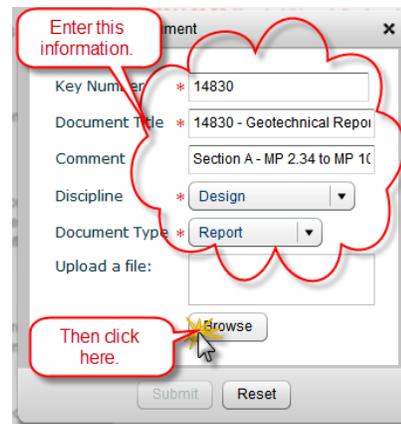
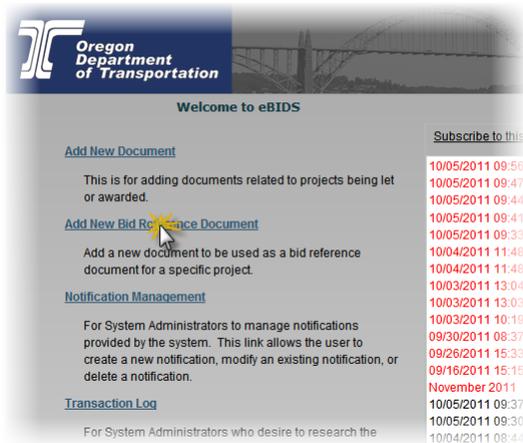
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### To add a Bid Reference document:

1. Click on the **"Add New Bid Reference Document"** link on the left side of the screen.
2. Enter the relevant data for the document. Click the Browse button and select the document to be uploaded.



\*\* Note – All fields marked with an asterisk (\*) are required. \*\*

3. Click the Submit button.



4. After the document has been uploaded, the system should display a notification that the upload was successful. Once this is displayed, click OK.



## Metadata by Document

<u>Document Name</u>	<u>Document Title</u>	<u>Discipline</u>	<u>Document Type</u>
As-Constructed Drawings	##### As Constructed	Construction	Drawings
Environmental Permit	##### Environmental	Environmental	Permit
Final Geotechnical Report	##### Geotechnical	Environmental	Report
Hazardous Materials Report - Level 1	##### Haz Mat Level 1	Environmental	Report
Hazardous Materials Report - Level 2	##### Haz Mat Level 2	Environmental	Report
Hydraulics Report	##### Hydraulics	Environmental	Report
Local Land Use Permit	##### Land Use	Public Information	Permit
Material Source Narrative	##### Material Source	Environmental	Report
Ordinance	##### Ordinance	Public Information	Permit
Pavement Design	##### Pavement Design	Design	Drawing
Pavement Report	##### Pavement Report	Construction	Report
Public Interest Finding	##### Public Interest Finding	Public Information	Public Interest Finding
Right of Way	##### Right of Way	Construction	Drawing
Storm Water Report	##### Storm Water	Environmental	Report
All files listed in the "Computer File Index – eBIDS Handoff" spreadsheet, see 3D Roadway Design's <a href="#">"HOW-TO" Guide</a>	#####_Roadway_eBIDS.zip	Design	LandXML
Notice of eBIDS Roadway Digital Design Data	#####_NoticeRdwyDigitalData.pdf	Design	DrawingCoordination

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Electronic Bidding Information Distribution  
System  
Bid Reference Document Guide



Oregon Department of Transportation

Last Updated: 12/02/15

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# ODOT eBIDS Bid Reference Document Guide

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## About the ODOT eBIDS Reference Document Guide

The purpose of this document is to describe a Bid Reference Document in context to the ODOT eBIDS System: What it is, how to upload it, and common questions that may arise regarding Bid Reference Documents.

### What is a Bid Reference Document?

Bid Reference Documents are the technical documents and reports that may be referenced in the Special Provisions but provided separately, as needed. This allows a bidder to better understand the project and to develop an informed bid. Not every project requires Bid Reference Documents.

Historically, Bid Reference Documents were provided to the Project Manager (PM) from the ODOT Project Leader (PL) or Local Area Liaison (LAL). The Special Provisions typically carried a single sentence saying “Copies of the <reference documents> are available for inspection at the Project Manager’s office.” There was no defined process to hand over Bid Reference Documents to the PM. Consequently, the PM often discovered the need for or availability of Bid Reference Documents when a bidder contacted them directly and requested the document.

Additionally, a bidder could request any Bid Reference Document that was referred to in the Special Provisions from the PM. There was no specific deadline by which the PM was required to supply Bid Reference Documents, sometimes causing confusion or delays in the bid opening date.

Today, the process will be defined in the Office of Project Letting (OPL) Plans, Specifications and Estimating (PS&E) Delivery Manual and in the Final PS&E Submittal / Completeness Checklist. The PL, LAL or delegated assistant is required to prepare and upload the Bid Reference Documents to the ODOT eBIDS System during the pre-bid phase; which is after the PS&E due date and before the advertisement date. The ODOT eBIDS System will provide the means for a potential bidder to download Bid Reference Documents as needed.

## **What Bid Reference Documents are included in ODOT eBIDS System?**

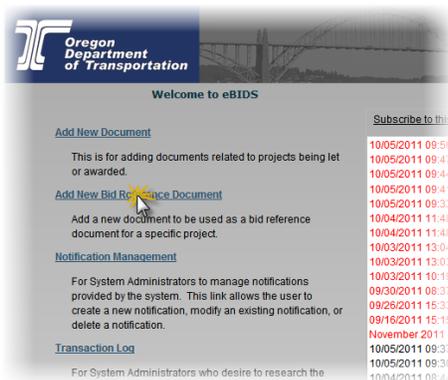
The ODOT eBIDS System includes Bid Reference Documents that are considered standard for most projects. The following documents are included in the ODOT eBIDS System.

- As-Constructed Drawings
- Environmental Permit
- Geotechnical Report
- Hazardous Materials Report – Level 1
- Hazardous Materials Report – Level 2
- Hydraulics Report
- Land Use Permit
- Ordinance
- Pavement Design
- Pavement Report
- Public Interest Finding
- Right of Way
- Storm Water Report
- All files listed in the “Computer File Index – eBIDS Handoff” spreadsheet into “XXXXX\_Roadway\_eBIDS”
- Notice of eBIDS Roadway Digital Design Data

This list was determined by evaluating the supplemental documents and reports that are necessary for a bidder to develop an informed bid on a project. These documents are only necessary in specific situations.

## What if I don't see the link "Add New Bid Reference Document"?

If you are a PL, LAL or designated assistant, the ODOT eBIDS System automatically recognizes you via your system login. If you don't see the "Add New Bid Reference Document" link on the left side of the screen, and you need to upload Bid Reference Documents, contact an ODOT eBIDS System Administrator to be added to the eBIDS user group with permission to upload Bid Reference Documents.



## ODOT eBIDS System Administrators

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## How do I prepare a Bid Reference Document for uploading?

To prepare a Bid Reference Document for uploading:

1. Convert the document into a pdf
  - a. Open original document
  - b. Click File > Print
  - c. Click the Printer Name drop-down menu > select Adobe PDF
  - d. In Acrobat Pro, click OK
  - e. Click Print
  - f. In Save As window, enter name according to the file name format listed under the "[What is the filename format?](#)" section > Save

## ODOT eBIDS Bid Reference Document Guide

Compress the document using Adobe Acrobat Pro:

- g. Open the PDF document in Adobe Acrobat Pro
  - h. Click File > Save as Other > Reduced Size PDF (middle left)
  - i. Click OK
  - j. In Save As window, enter name according to the file name format listed under the [“What is the filename format?”](#) section > Save
2. Secure the document using Adobe Acrobat Pro:
- a. Open the PDF document in Adobe Acrobat Pro
  - b. Click View > Tools > Protection
  - c. Click Restrict Editing (middle left)
    - i. Enter eBIDS (case sensitive) as the password
    - ii. Click OK twice
  - d. In Save As window, enter name according to the file name format listed under the [“What is the filename format?”](#) section > Save
3. If necessary, bundle old bridge or “as constructed” drawing .tif and .pdf files into single PDF Portfolio:
- a. Open Adobe Acrobat Pro
  - b. Click View > Tools > Pages
  - c. Click Combine Files into PDF (middle left)
  - d. Click the Add Files drop-down menu (upper left) > select Add Files
  - e. In Add Files window, select the document > click Open
  - f. Click Combine Files (bottom right)
  - g. Click File > Save As
  - h. In Save As window, enter name according to the file name format listed under the [“What is the filename format?”](#) section > Save

### **How do I add a Bid Reference Document to the ODOT eBIDS System?**

To add a Bid Reference Document to the ODOT eBIDS System, the project must be in the pre-bid phase; which is after the PS&E due date and before the advertisement date.

When an PL, LAL, or delegated assistant opens the ODOT eBIDS System, a user home page will be displayed and one of the links on the left side of the home page will be “Add New Bid Reference Document”.

## ODOT eBIDS Bid Reference Document Guide

1. Clicking on the “Add New Bid Reference Document” link on the left side of the screen, to display the Add Reference Document window:

Figure 1: Bid Reference Document Add Screen

The screenshot shows a web form titled "Add Reference Document" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Key Number**: A text input field with a red asterisk (\*) indicating it is required.
- Document Title**: A text input field with a red asterisk (\*) indicating it is required.
- Comment**: A text input field.
- Discipline**: A dropdown menu with a red asterisk (\*) and the text "--Select--".
- Document Type**: A dropdown menu with a red asterisk (\*) and the text "--Select--".
- Upload a file:**: A text input field with a "Browse" button below it.
- Submit** and **Reset**: Two buttons at the bottom of the form.

- a. Enter the key number associated with the project in the Key Number field. The Key Number field is used to associate a document with the project.
- b. Enter the document name in the Document Title field. This is the name users will see and use to select the document. This is similar to the filename of the document that was uploaded.

**\*\*Note** - the Document Title must be unique; otherwise an error message may appear (e.g., add the key number to the beginning of the Document Title to make it unique).

- c. The Comment field is optional, but this could describe other details about the Bid Reference Document.
- d. The Discipline is a dropdown list used to associate a document to an area or field of work. Select the applicable Discipline.

## ODOT eBIDS Bid Reference Document Guide

- e. The Document Type is a dropdown list used to indicate the type of document. Select the applicable Document Type.

The relationship between the defined Documents and the associated Document Types is shown in Figure 2.

Figure 2: Metadata by Document

Document Name	Document Title	Discipline	Document Type
As-Constructed Drawings	##### As Constructed	Construction	Drawings
Environmental Permit	##### Environmental	Environmental	Permit
Geotechnical Report	##### Geotechnical	Environmental	Report
Hazardous Materials Report - Level 1	##### Haz Mat Level 1	Environmental	Report
Hazardous Materials Report - Level 2	##### Haz Mat Level 2	Environmental	Report
Hydraulics Report	##### Hydraulics	Environmental	Report
Land Use Permit	##### Land Use	Public Information	Permit
Material Source Narrative	##### Material Source	Environmental	Report
Ordinance	##### Ordinance	Public Information	Permit
Pavement Design	##### Pavement Design	Design	Drawing
Pavement Report	##### Pavement Report	Construction	Report
Public Interest Finding	##### Public Interest Finding	Public Information	Public Interest Finding
Right of Way	##### Right of Way	Construction	Drawing
Storm Water Report	##### Storm Water	Environmental	Report
All files listed in the "Computer File Index – eBIDS Handoff" spreadsheet, see 3D Roadway Design's <a href="#">"HOW-TO" Guide</a>	#####_Roadway_eBIDS.zip	Design	LandXML
Notice of eBIDS Roadway Digital Design Data	#####_NoticeRdwyDigitalData.pdf	Design	Coordination

- Click the Browse button and select the document to be uploaded. The document can be located on the local PC or network. The filename should conform to the naming standard listed in the [What is the filename format](#) section.

## ODOT eBIDS Bid Reference Document Guide

3. Click the Submit button. When the Submit button clicked, the Bid Reference Document is uploaded to the ODOT eBIDS System, if there are no errors.

If there are errors, contact an ODOT eBIDS System Administrator for assistance. Otherwise, click on OK when the successful upload notification is displayed.



More information is available in the [ODOT eBIDS User's Guide](#).

### **What is a document type and how is it associated with the Bid Reference Documents?**

As documents are uploaded to ODOT eBIDS System, each Bid Reference Document is associated with a 'Document Type'. Currently, eight document types have been defined:

1. BOLI Trade Data
2. Catalog
3. Coordination
4. Drawing
5. LandXML
6. Permit
7. Public Interest Findings
8. Report

The relationship between the defined Documents and the associated Document Types is shown in Figure 2, above.

## What is the filename format?

Documents uploaded to the ODOT eBIDS System are stored in FileNet and adhere to a common file naming standard. An error message may appear if the Document Title isn't unique (e.g., add the key number to the beginning of the Document Title to make it unique). For Bid Reference Documents, filenames should be in the following format beginning with the key number associated with the project:

- ##### As Constructed
- ##### Environmental
- ##### Geotechnical
- ##### Haz Mat Level 1
- ##### Haz Mat Level 2
- ##### Hydraulics
- ##### Land Use
- ##### Material Source
- ##### Ordinance
- ##### Pavement Design
- ##### Pavement Report
- ##### Public Interest Finding
- ##### Right of Way
- ##### Storm Water
- ##### \_Roadway\_eBIDS.zip
- ##### \_NoticeRdwyDigitalData.pdf

## What do I do if a Bid Reference Document is too large?

The ODOT eBIDS System has a maximum file size limitation of 100MB. This is a very large file size limitation which is anticipated to accommodate most of the documents being uploaded. However, if a document is larger than 100MB, the system will not allow it to be uploaded.

If your file is too large, it is important to check to see that the '[Compress the document using Adobe Acrobat Pro](#)' instructions were followed.

1. Open the PDF document in Adobe Acrobat Pro
2. Click File > Save as Other > Reduce Size PDF (middle left)
3. Click OK
4. In Save As window, enter name according to the file name format listed under the "[What is the filename format?](#)" section > Save

## ODOT eBIDS Bid Reference Document Guide

If your file is still too large, use Adobe Acrobat Pro to split your file into smaller parts.

1. Open original document
2. Click View > Tools > click Split Document (middle left)
3. In the Split Document window, enter the maximum number of pages needed for each PDF document
4. Click OK.

The split PDF documents will be saved in the same folder as the original PDF document. Use the naming convention <Document Title > Part 1 of 2.pdf (e.g. ##### As Constructed Part 1 of 2.pdf and ##### As Constructed Part 2 of 2.pdf).

### **What do I do if new Bid Reference Documents or document types are needed?**

Only defined documents can be uploaded to the ODOT eBIDS System. If it is determined that a new document or document type is necessary to assist the bidder in developing an informed bid on a project, an ODOT eBIDS System Administrator will need to be contacted. Modifications will be necessary to potentially add new documents or new document types to the ODOT eBIDS System, as well as to FileNet.

### **What do I do if new Bid Reference Documents are needed after the advertisement date of a project?**

It was noted above that a project must be in the pre-bid phase in order for PL, LAL or delegated assistant to add Bid Reference Documents. It is understood that there may be a need to add Bid Reference Documents, based on changes in the Special Provisions, after the advertisement date of the project.

The Addenda or Letter of Clarification (LOC) process, as specified by the OPL [PS&E Delivery Manual](#), needs to be followed to change the documents that have previously been uploaded or to upload a new documents. Contact the OPL Quality Assurance (QA) Engineer assigned to the project for help with the Addenda or LOC process.

In the particular case of Roadway Digital Design packages being added via LOC, it is required that System Administrators are provided with three documents for posting:

## ODOT eBIDS Bid Reference Document Guide

1. Letter of Clarification, in PDF format, listing the exact name of the two documents to be posted as separate bullets and using this wording:

*The following Bid Reference documents are now available on eBIDS:*

- *XXXXX\_NoticeRdwyDigitalData.pdf*
  - *XXXXX\_Roadway\_eBIDS.zip*
2. "XXXXX\_NoticeRdwyDigitalData.pdf", where XXXXX is the Key Number
  3. "XXXXX\_Roadway\_eBIDS.zip"

If Roadway Digital Design packages do not meet these formats, the documents will be rejected and the PL will be directed to follow 3D Roadway Design's ["HOW-TO" Guide](#) and re-submit the required documents.

### Who uploads the Bid Reference Documents?

In most situations, Bid Reference Documents are uploaded by the ODOT PL or LAL from the Project Delivery Team developing the PS&E Submittal. Due to security limitations, non-ODOT consultants are unable to upload documents.

### Who can update the Bid Reference Documents?

After a Bid Reference Document has been initially uploaded, a need may arise to update the content or description of the document. Before the advertisement date, the PL, LAL or designated assistant **who initially uploaded the document** is allowed to make updates those documents, and only those the documents they initially uploaded.

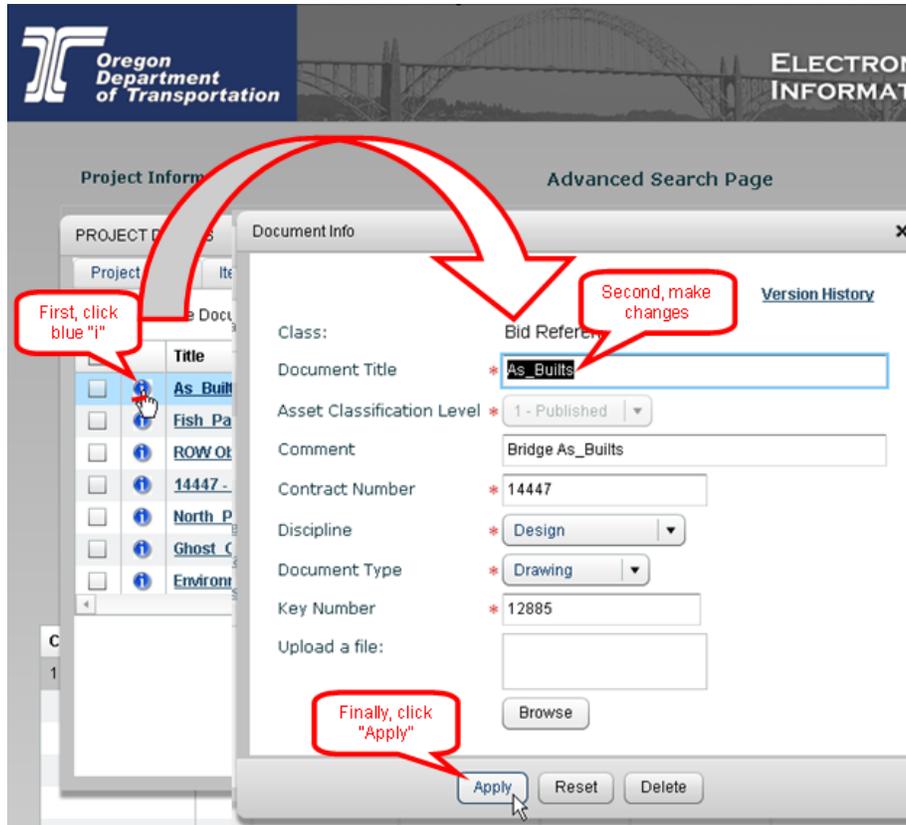
To update a Bid Reference Document:

1. Go to the ODOT eBIDS Home Screen > select Search (upper right-hand corner of the screen)
2. Click on Go to Advanced Search
3. Enter search criteria (i.e., Key Number, Project Name, etc.) > click Search button (middle of screen)
4. Click on the project
5. Click on the Bid Reference Documents tab
6. On Bid Reference Documents tab, click blue circle with the "i" in the middle, next to the document that needs modification

## ODOT eBIDS Bid Reference Document Guide

7. In Document Info window, make changes
8. Click Apply

Figure 3: Bid Reference Document Edit Screen



The ODOT eBIDS System Administrators are allowed to update existing Bid Reference Documents at any time, so long as they follow pertinent business processes.

### Who can view the Bid Reference Documents?

During the pre-bid phase of a project, only the specific PL, LAL or designated assistant who initially uploaded the document or an ODOT eBIDS System Administrator can view it.

During the bid phase of a project, anyone who has access to ODOT eBIDS System may view the Bid Reference Documents. The bid phase is between the advertisement date and the bid opening date for the project.

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Post-bid phase, only users internal to ODOT are allowed to view the Bid Reference Documents. The post-bid phase is after the bid opening date for the project.

### **I just uploaded Bid Reference Documents, but can not find my project on ODOT eBIDS System. What is wrong?**

If you successfully uploaded Bid Reference Documents, but can no longer find your project in the ODOT eBIDS System, contact an ODOT eBIDS System Administrator to report the problem. If the problem occurs during the pre-bid phase, **DO NOT** reload the Bid Reference Documents. The Bid Reference Documents will reappear as soon as the ODOT eBIDS System Administrator fixes the Trns.port database.

### **Who can download or print the Bid Reference Documents?**

Anyone with authority to view the documents is able download or print the documents.