Login to iCX and Submit Vendor Bid

Job Aid

Roles Impacted

Admin Authorized Signer Last Revised

December 20, 2024 R8.0.0.0 С

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Introduction

This job aid provides step-by-step instructions for active users to log into the ExeVision Integrated Contract Exchange (iCX) web application and to submit a construction and maintenance contract bid using the iCX application.



The iCX application may also be referred to as the Integrated Contract Exchange or the Electronic Bidding System (EBS). It will be referenced as iCX throughout this document.

If you need assistance with any technical issues related to the application, please call 801-426-7777 or email <u>txsupport@exevision.com</u>.

Overview

To streamline contractor access to bidding functions, TxDOT has integrated the bid proposal request and bid submission into iCX. Both proposal requests and bid submissions are accomplished using the iCX application. Note that iCX allows contractors the option to receive a paper proposal. An informational proposal may still be viewed online, but contractors will receive paper proposals only upon request.

Before submitting an electronic bid for the first time, review the current <u>Standard Specification</u> and <u>Special Provisions to Item 2</u>, "Instructions to <u>Bidders.</u>" The specifications and provisions outline the requirements for submitting an electronic bid.

Your company administrator is responsible for creating and managing accounts for employees who need iCX access to request proposals and submit bids on behalf of the company. The iCX administrator can also reset passwords when necessary. Each employee must use a unique work email address, as duplicate email addresses are not permitted in iCX.

Process Overview

This job aid covers the following activities for accessing iCX and submitting a vendor bid in the application:

- **1.** Login to iCX
- 2. Submit Bid





- 1. Access the Login Page
 - Navigate to Electronic Bidding System (iCX) page and click the Login to the System icon
- 2. Enter Your Username and Password
 - Use your company username (company email) and password to login.

integrated com	CX . Tractor Exchange
å Username	
Password	
1 and a	Forgot password?
Login	

First-time users can refer to the Login to iCX and Request Bid Proposal job aid for detailed instructions on how to log in after their iCX account has been created or password has been reset.

3. Upon successful login, the iCX Dashboard will open.



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- 1. Click Menu
- 2. Select Bidding under Bidding.

⊘ <i>i</i> CXWeb		12		Menu -	
Darbhoard		_	Bidding	Profit 1	
Dashboard		_	Proposal Repuest	Company Info	2
My Recent CSJs/Projec	ds.		Bidding		
CCSJ Number	Project ID	Bid Op	Projects To Be Let		
No records to display			Award & Contract		

 Click in Select CCSJ field and either type in a known CCSJ number or scroll the list to select a Construction or Maintenance project from the drop-down list.

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Dashboard Prop	posal Request × Bidding ×			
Select CCSJ	Select CCSJ			
CCSJ	1			٩
Description	Select CCSJ			
005.5.1	CCSJ	County	Highway	
DBE Goal	7051-13-687 [BBQA2]	BASTROP	SH 71	<u>^</u>
Request P	7051-13-755 [BBQA2]	WILLIAMSON	IH 35	-
	A search that results in more than 300 items n	nust be narrowed.		
Export Items Im	port items			

Optional: Request a Paper Proposal

Once a CCSJ has been selected, the **Request Paper Proposal** button is enabled.

• Click the Request Paper Proposal button.

Select CCSJ	7051-13-687 [BBQA2]
CCSJ	7051-13-687 [BBQA2]
Description	Construct New Road
DBE Goal	0.00 %

• Select an Address from the drop-down list



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Project Numb	er 7051-13-687		Distric	ct	Austin	
Request Paper Prop	osal					×
Company Name	FIREMAN EXCAVATING, INC.	Compan	y Number	15746		
CSJ	7051-13-687 [BBQA2]					
roject ID	A01211034					
roject Description	Construct New Road					
etting Date	7/29/2024 1:00:00 PM					
						_
hipping Address		Shipper Information,	if applicable	e		
ddress*	Select an address	CourierName				
	Select an address	1				

- If using a **courier service** (FedEx, UPS, etc.), enter the courier's name and your company's account number. (TxDOT does not pay/reimburse for couriers.)
- Click the **Request** button
- Review the success message pop-up and click OK to close it.
- The paper proposal will be sent via the US Postal Service if a courier is not entered. (TxDOT covers the applicable postage.)
- **4.** Vendor has the option to **a Export Items** and **b Import Items** to their estimating application and iCX.





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Click the Export Items button, and a window will appear.



- Select the desired file format for export and click Export.
- Choose the file location where you want to export the file, then click Save.



b) Import Items

• Click the **Import Items** button, and a window will appear.





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- Select a .csv or compatible file by clicking the Choose File button, then click Continue.
- A confirmation message will appear, indicating that the file has been successfully imported.

txdot-uat.exevision.com	
Import Successful.	
OK	

5. Enter Bid Guaranty Details

 After successfully selecting a CCSJ, navigate to the Bid Guaranty box which to the right of the CCSJ number label to select a Surety Type using the dropdown list, enter Bond#, and click Save Bond Information. The Bond Status value will update to Saved.

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Dashboard Pr	oposal Request × Bidding ×			
Select CCSJ	7051-13-755 [BBQA2]			
CCSJ	7051-13-755 [BBQA2]	County		WILLIAMSON
Description	Adaptive Signal Coord And Syr	nc		
DBE Goal	5.00 %	Project Number		7051-13-755
Request	Paner Proposal	Bid Date & Time	(Central)	7/29/2024 5:00:00 1
4 705 1-13-788		Bid Guaranty		
 Items 		Guaranty Amount:	\$0.00	
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The Proposal Requestor and User roles cannot submit bids; they can only enter bid items.

- 6. Enter Unit Prices (if not using the import/export functionality shown above)
 - Click **Items** in the left navigation pane
 - In the left navigation pane, click the arrow 🕨 next to **Items.**
 - Click on **Roadway** and enter a **Unit Price** for each bid item listed.



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To view bid items without a **Unit Price**, click the **Show Incomplete Items Only** checkbox located in the summary row below all the item numbers.

- If **A** + **B** Category is displayed, click on it and enter a Quantity for each item listed.
- If one/more Alternate Group #X items are listed under Items, click on each:
 - Click the **Base Bid** or **Alternate #X** items to view the bid item alternatives;
 - Enter a **Unit Price** for both items;

4 Items	Seq #	Item Number	Description	UOM	Quantity	Unit Price	Extended Price
A + B Category	407	464-6001	RC PIPE (CL III)(12 IN)	LF	220.000	\$62.310	\$13,708.20
Roadway Alternate Group # 1	408	4122-6035	THERMO PIPE(12")(PP)(TY S)(TY II)	LF	448.000	\$25.770	\$11,544.96
O Base Bid O Alternate # 1A	i						
 Alternate Group ≑ 2 Base Bid 							
Addenda	Show In	complete Items Onl	у□	Bid:	\$292840713.72	Category:	\$25,253.16

- Click the radio button next to the option to include in the bid. (The selected option will turn blue).
- Once Unit Prices are entered and an option selected, the Alternate Group #X label will also turn blue.

Once all entries are completed and saved, the **Items** label will turn blue.

- Click the **Save** button to the right of the header details to ensure all work is appropriately retained.
- 7. Acknowledge the Addenda (if applicable).
 - If the Addenda label in the left navigation pane is red, click it
 - Note any Addenda that have been submitted
 - Click the URL to open and review the revisions submitted in the Addendum
 - Acknowledge the Addendum, which will make the Addenda label turn blue



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- The Items label will turn red if any bid items have been added via an Addendum. Make Unit
 Price entries as required.
 - (Optional): Unit Prices may be edited for any **Item Number** for which the quantity was changed under the Addendum.

Request Paper Proposal Export Items Import Items	Bid Date & Time (Central)	7/29/2024 5:00:00 PM	Estimate
4 7051-13-755	Seq #	Date	Туре
 Items Roadway Addenda Certifications 	No addendum available		
Subcontracts	, I	2	

Click the **Save** button to the right of the header details to ensure all work is appropriately retained.

If an addendum is issued after the vendor has submitted their bid, the bid will be automatically withdrawn. The vendor will receive an email notifying them of this change and will need to log in to acknowledge the addendum and input any required unit prices.

8. Review and acknowledge required Certifications

- In the left navigation pane, click the arrow 🕨 next to **Certifications**
- Click on each required certification, review the content and acknowledge accordingly.

Request Paper Proposal	Bid Date & Time (Central)	7/29/2024 5:00:00 PM	Estimate	\$1,400.00	
Export Items Import Items					
7051-13-755			()		
4 Items		Certificatio	n of Interest in Other B	Bid Proposals for This Work	
Roadway	Quotation(s) have been issued in this firm's na to whom the bidder provided quotes and the	me to other firm(s) interested in this work for firms from whom the bidder received quotes p	consideration for performing prior to award of the contract	g a portion of this work. Note: If yes is selected and th t.	is bid is the low bid, the bidder agrees to identify the firm
Addenda	■YerONo				
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Certification of Interest in Other Bid Proposals fo					
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 • Construction of the state of the	Roadway Addenda	this contract may be terminated and payment may be withheld if this certification is inaccurate.
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Image:	* 7051-13-755	Disclosure of Lobbying Activities
Additions Contractions and where the access these terms and contracts Contractions and contracts apprendix apprend	Roadway	I have paid, or agreed to make payment, to a lobbying entity for influencing or attempting to influence an office or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of
Certicators Certicato	Addenda	Congress in connection with a covered Federal action (this contract).
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Items Roadway Addenda Certification of Interest in Other Bid Proposato Child Support Statement Child Support Child Support Statement Child Support Statement Chil	* 7051-13-755	
Roadway Iam legally-board to perform the work described in the plane and specifications in consideration of the anount of this bid. In addition I am certifying that the only persons or parties interested in this bid are those named and the bidder has not directly or infinitently participated in collision, entered into an agreement or otherwise taken any action in restraint of free competitive bidding in connection with this project. Addenda Image: Imag	* Items	Anti-Collusion
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Once a Certification is acknowledged, it will change from red to blue in the left navigation pane to indicate that it has been completed.

- Click the **Save** button to the right of the header details to ensure all work is appropriately retained.
- 9. Confirm Section Completion.
 - Once all labels are addressed. All labels will change from red to blue, including the CCSJ number label, indicating all required information has been completed in the left navigation page.







10.Check Completed Details

• Click on the **CCSJ number** label to verify that there is no red text in the left navigation pane or the Bid Guaranty area.

4 7051-13-755		Bid Guaranty		
4 Items		Guaranty Amount:	\$0.00	
Roadway		Surety Type:	Surety 2000	~
Addenda		Bond#:	11122	
 Certifications 		Bond Status:	Saved	
Certification	of Interest in Other Bid Proposals fo		Save Bond Information	
Child Support	t Statement	Vault Clock		
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Contractor's	Assurance Regarding Subcontractor	Time 11:50 AM Central Tir	me Zone	
Anti-Collusio	n	Rid Amount		
Subcontracts		bid Amount		
•	•	Bid Total \$1,140.	00	
		Uploaded Documents	1	

11. Review **Bid Draft Report** (optional)

If you would like to review the bid draft, click the View Bid Draft button. This will open a new tab, Bid Draft Report tab with the draft of the bid for your review.

Request Paper Proposal Export Items Import Items	Bid Date & Time	(Central)	7/29/2024 5:00:00 PM		Estimate	\$1.400.00
* 7051-13-755 * Items	Bid Guaranty Guaranty Amount:	\$0.00		View Bid Draft S Bid H mry	iut mit Bid View !	Submitted Bid Withdraw Bid
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Addenda	Bond#:	11122		No records to di	splay	
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Bid Report							Done. Total 4 pages loade				
irregular and may be reject or organization for the purp (manually and electronical) States and the State of Tex Federal Contract Number: 7051-1:	d by the Texas Department of Transportation. Plans and specification see of submitting a bid as a general contractor without the known without r) and the firm for which they are authorized to sign, do so under the as 3-755 Adaptive Signal Coord And Sync	ns on this pro e and authorit penalty of per	bject can by of the rjury as s	not be tr departm specified	ansferred ent. Those by the law	to any who s /s of th	other firm ign e United				
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Contract Name:	Adaptive Signal Coold And Sync			Tojec							

12.Submit Bid

• After reviewing the draft bid close the **Bid Draft Report** tab, click the **Submit Bid** button. You will be prompted to confirm the submission. Click **OK** to submit the bid. A pop-up message will confirm your bid submission.

Export items Import items								
4 7051-13-755	Bid Guaranty			View Bid Drat S	iubmit Bid View S	Submitted Bid Withdray	v Bid	
* Items	Guaranty Amount:	\$0.00		Bid History	2			
Roadway	Surety Type:	Surety 2000	~	Conf.#	Action	Bid Date	Submitter	Bid Amount
Addenda	Bond#:	11122		No records to di	splay			
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Certification of Interest in Other Bid Proposals fo		Save Bond Information						

ty 200 2 Bond	You are about to submit a bid for proje vault. Doing so constitutes a legally-bir described in the plans and specificatior this bid. If you want to continue, click *	View Bid Draft Submit Bid View St vision.com		txdot-uat.exevision.com says Bid submitted successfully.	ar
	ОК	Cancel			



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