# Editing Specifications in the Automated White Book (Demo Part 1/3)
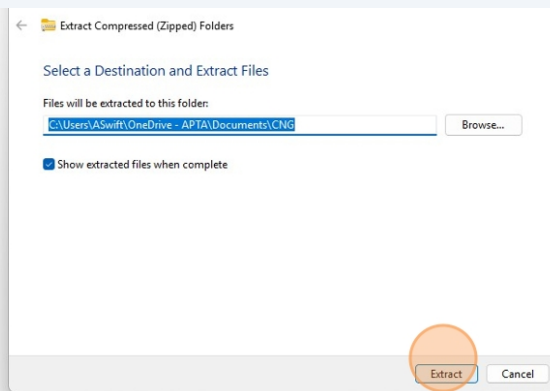
Begin using the Automated White Book by inputting information to personalize the contract documents.

1 Welcome to the demo of the American Public Transportation Association's automated White Book.
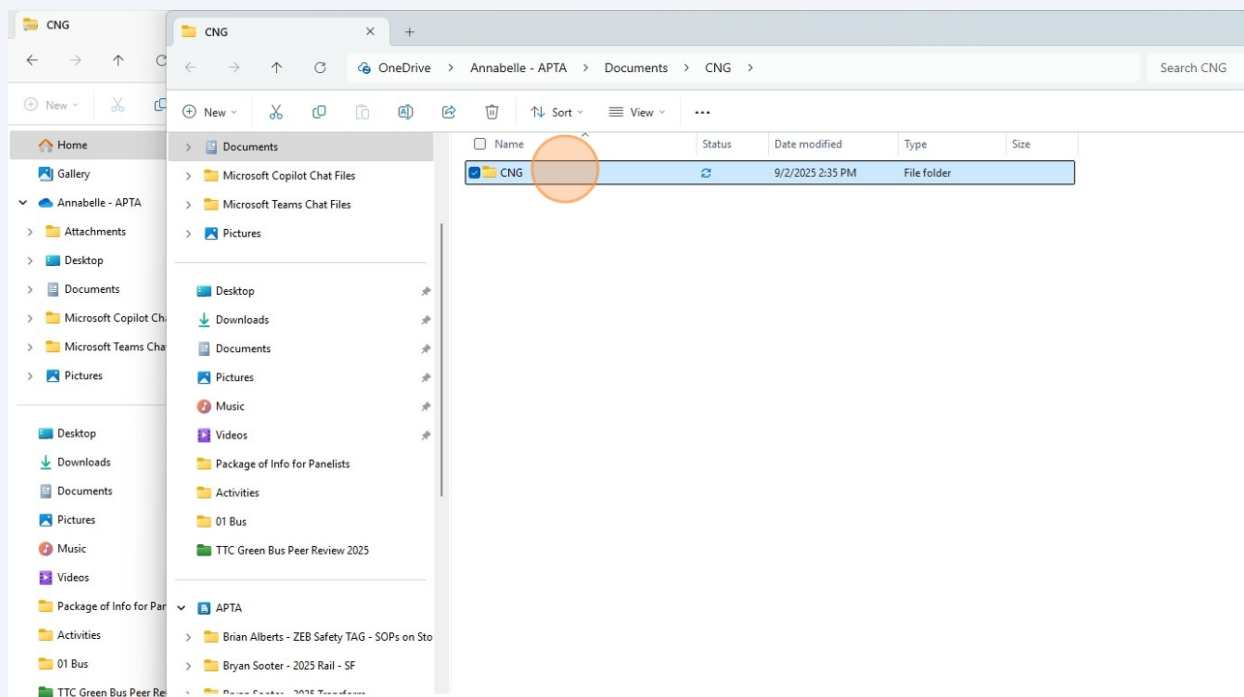
To start, select your desired propulsion type on the APTA website. Unzip the file and save the results.
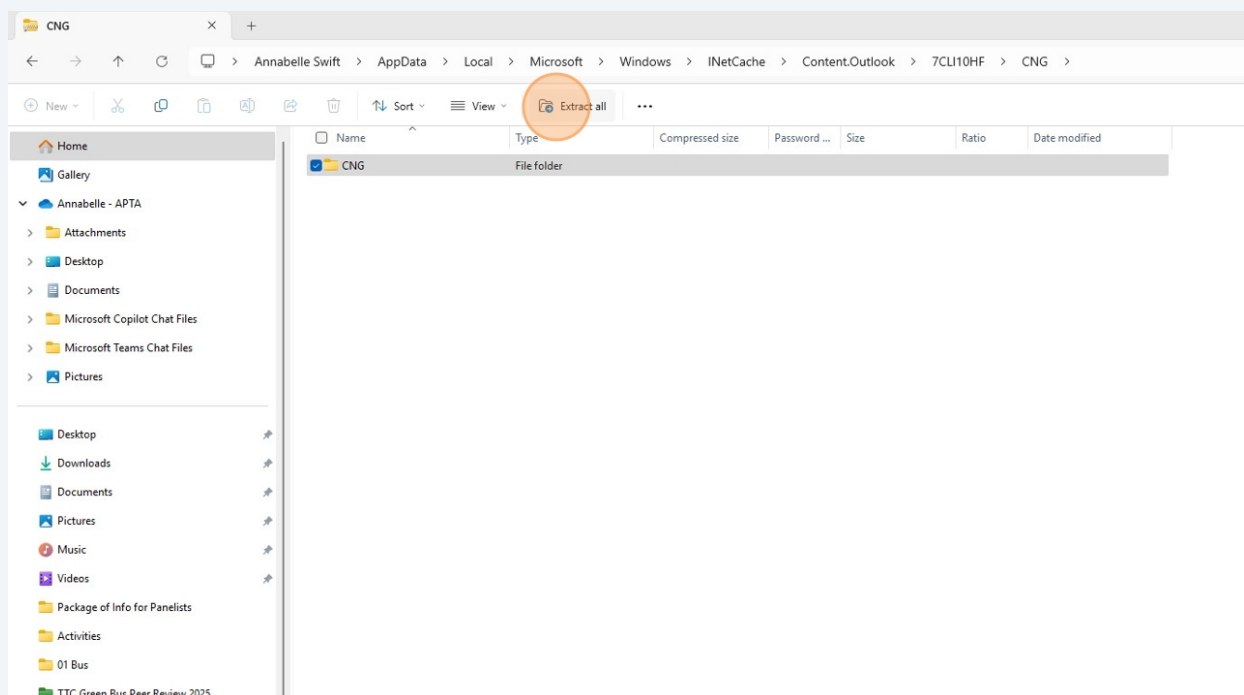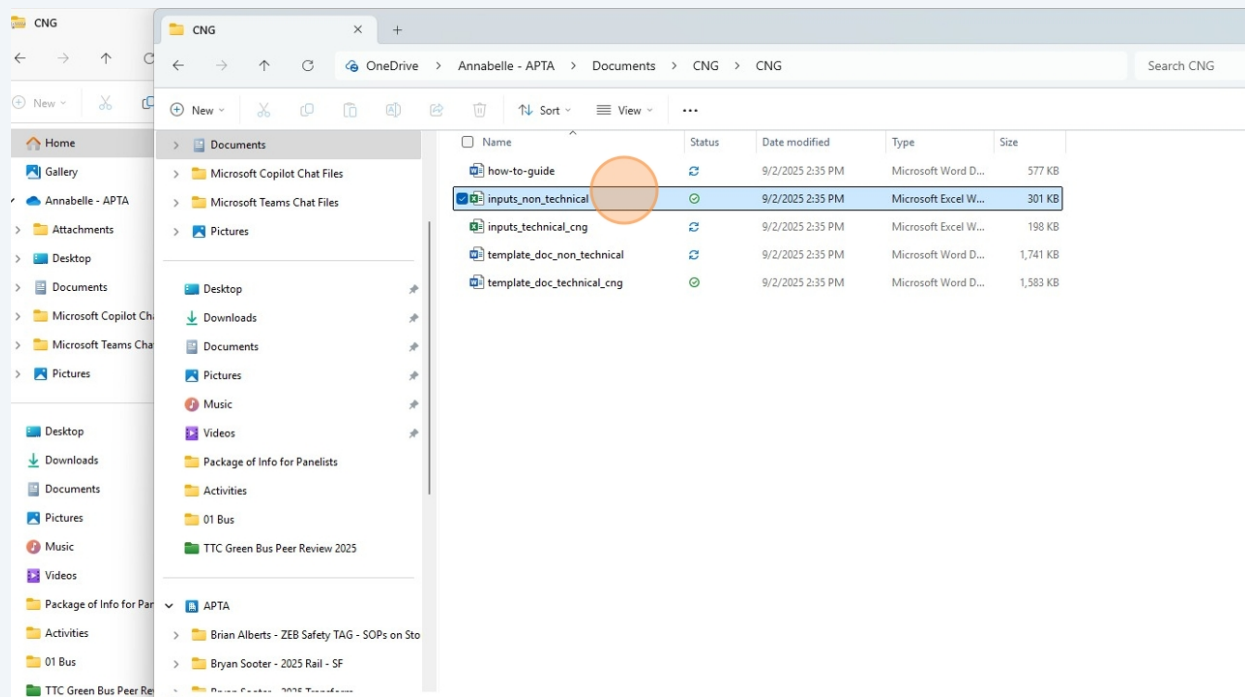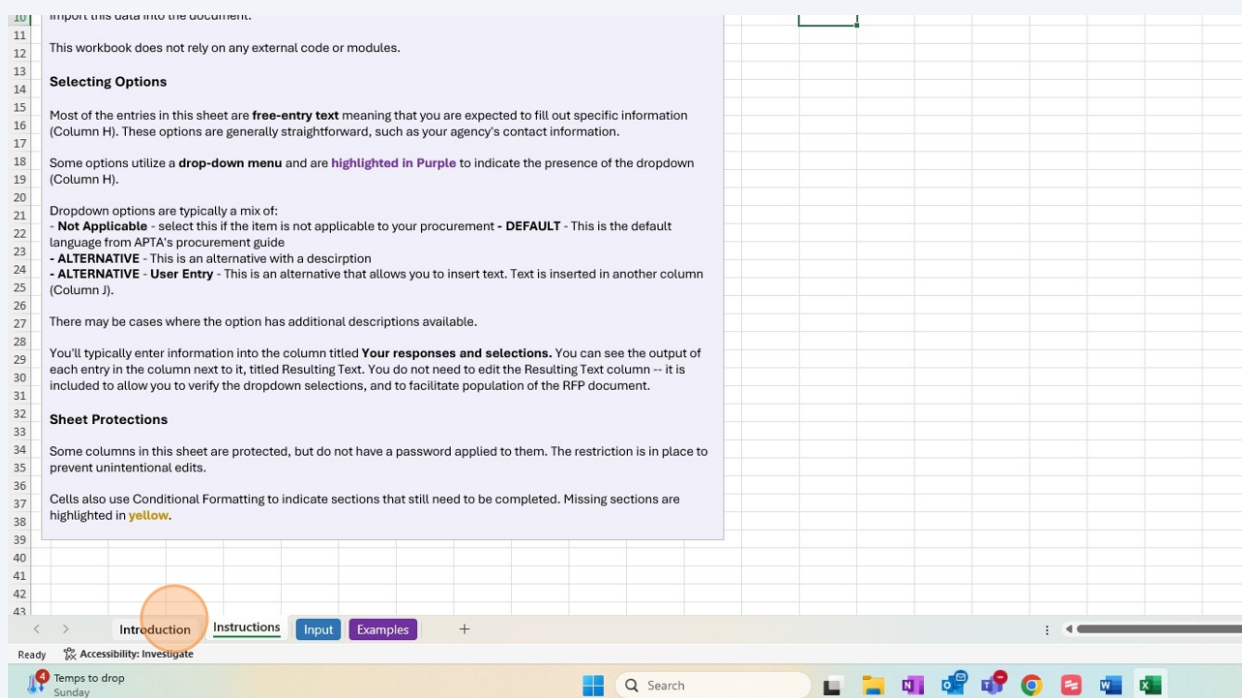
2 Inside the folder, you will see multiple items. Start with the Commercial (or "non-technical") Terms.

3 Step 1: Open the "non-technical" excel spreadsheet.
Begin by reading the Introduction and Instructions sheets.

4 The Introduction sheet prompts you to select the propulsion type of your buses.

Instructions Sheet

kbook

ds for agencies to fill in, that will be fed into the RFP template.

ne technical section of the whitebook (i.e., Secions 1-5 and 7-11)

ion form to gather agency information and responses to specific questions.
are provided via pull-down menus. The entered information will then be processed
hich can be printed as needed.
ct the propulsion type between electric,diesel, CNG, or hybrid from the drop-down
ers (see Cell H7).

Propulsion Type | Diesel

Dependencies	Description
Global Lists	The Input sheet serves as the main form for officers to complete. Responses should be entered either by typing or by selecting from the drop-down list. The resulting text will then be automatically populated.
None	Predefined answers for drop-down menus.
Input	This sheet is used as the mailmerge input for the RFP template. This sheet is hidden
None	Providing examples for some of more complicated entry rows in the input sheet
None	The tab explains how to use and add to this spreadsheet, and users have to select the propulsion type to access the correct collection form

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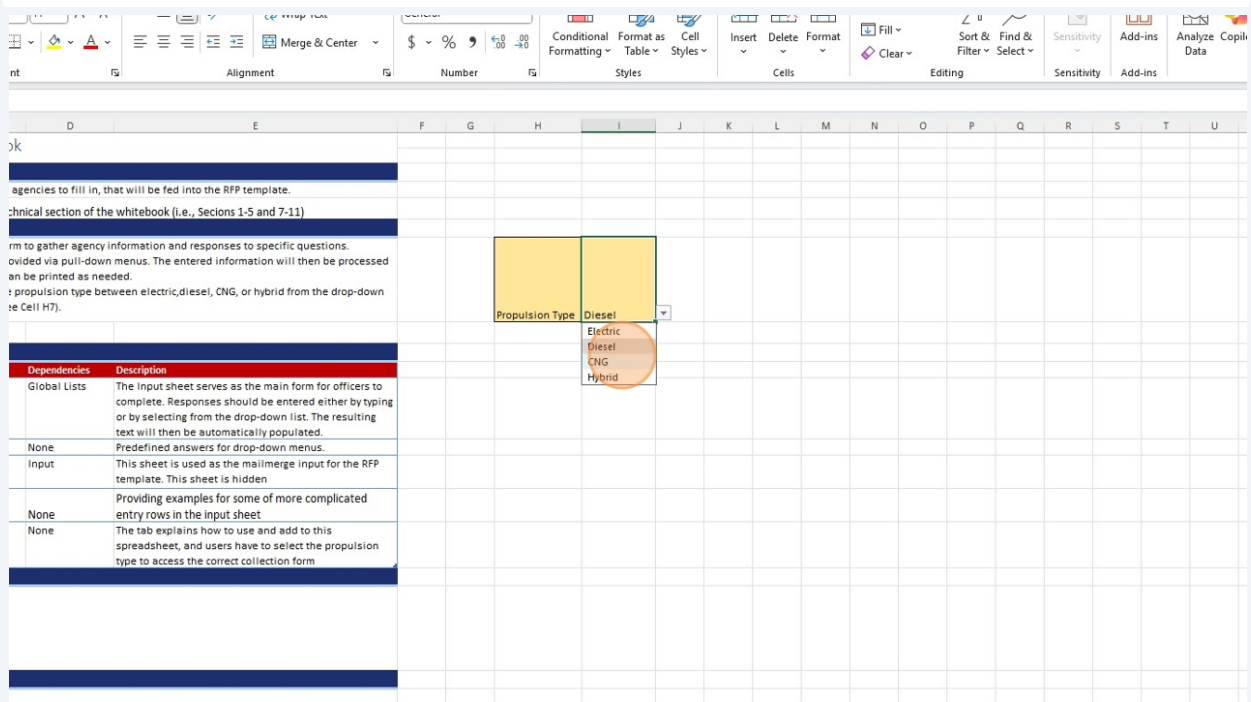es to fill in, that will be fed into the RFP template.

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ne	Providing examples for some of more complicated entry rows in the input sheet
ne	The tab explains how to use and add to this spreadsheet, and users have to select the propulsion type to access the correct collection form

5 Tip: Open the template document side-by-side with the Excel input sheet—ideally on a second screen. This allows you to visually track how your inputs will affect the document.
Do not modify the template document directly! You will be able to edit the final document in later steps.
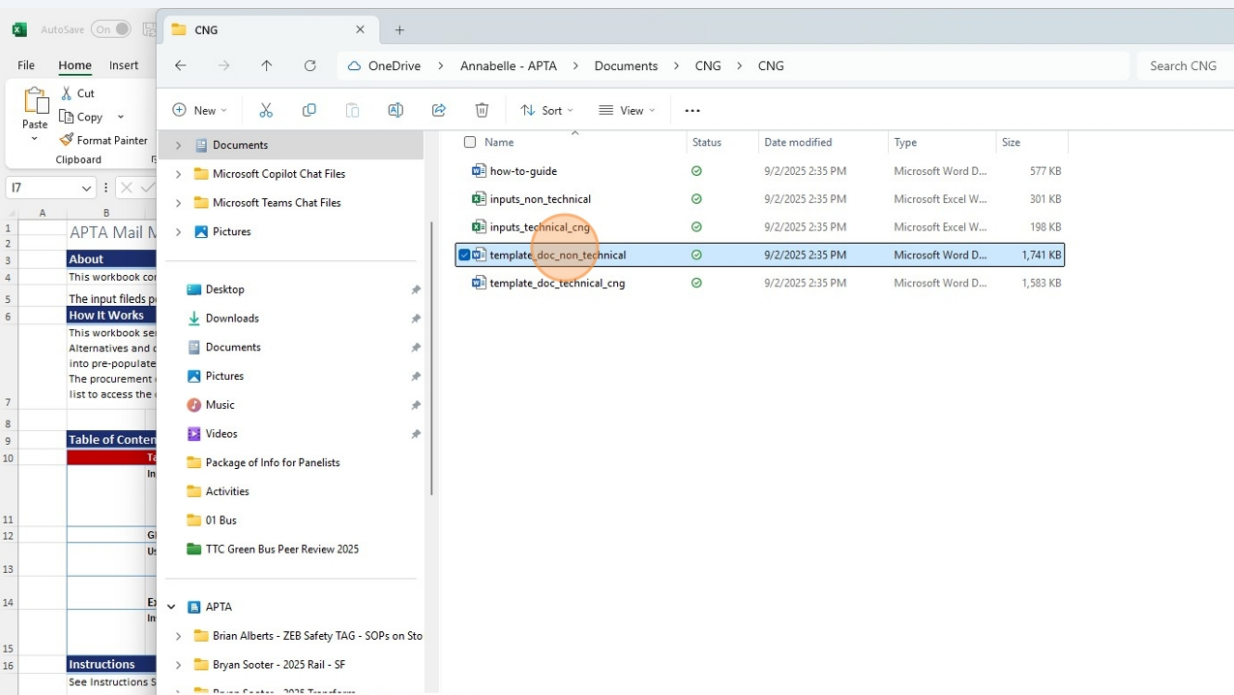
Standard
Bus Procurement
Guidelines

A Standardized
Request for Proposal Contract Form
for the Transit Industry

5	The input fileds pertain to the none technical section of the whitebook (i.e., Secions 1-5 and 7-11)
6	**How It Works**
7	This workbook serves as a collection form to gather agency information and responses to specific questions. Alternatives and default options are provided via pull-down menus. The entered information will then be processed into pre-populated documents, which can be printed as needed. The procurement officer must select the propulsion type between electric,diesel, CNG, or hybrid from the drop-down list to access the correct parameters (see Cell H7).

Propulsion Type

9	**Table of Contents**		
10	**Tab Name**	**Dependencies**	**Description**
11	Input Sheet	Global Lists	The Input sheet serves as the main form for officers to complete. Responses should be entered either by typing or by selecting from the drop-down list. The resulting text will then be automatically populated.
12	Global List	None	Predefined answers for drop-down menus.
13	Use for Word Doc	Input	This sheet is used as the mailmerge input for the RFP template. This sheet is hidden
14	Examples	None	Providing examples for some of more complicated entry rows in the input sheet
15	Instructions	None	The tab explains how to use and add to this spreadsheet, and users have to select the propulsion type to access the correct collection form
16	**Instructions**		
	See Instructions Sheet		
18	**Help/Questions**		
	You may direct questions to:		
	Sal Zahedi		
	Senior Transportation Planner & Data Scientist		
	szahedi@foursquareitp.com		

Introduction   Instructions   Input   Examples

6

Step 2: The **Input** sheet is where you will spend most of your time configuring selections for your contract. Each row in this sheet represents a clause or section of the contract that can be modified.

7

You can use the **Used in Section(s)** column to see where each input will apply in the World template.

The first screenshot shows a spreadsheet with the following content:

Please answer the following questions. Please note that some questions require you to type your answer, and to choose from a set of options. All your manual entries are interpreted as text and imported to the document here; therefore, please consider correct capitalization, units, and symbols in your entries (your responses sh... added to column H and column J if needed).

Used in Section(s)	Subsection	Requirement	Questions	Notes and Suggestions
Throughout		Required	What is your agency/organization name?	E.g. Washington Metropolitan Are
Throughout		Required	In which city is your agency located?	E.g. Washington D.C
Throughout		Required	In which state is your agency located?	E.g. district of Clumbia
Throughout		Required	In which county is your agency located?	E.g. district of Clumbia
Throughout		Required	In which jurisdiction is your agency located?	E.g. district of Clumbia
Throughout		Required	What is the name for this RFP?	E.g., Request for Proposals - Vehi for Agency
Throughout		Required	What is the date of solicitation? [month/day/year]	e.e.g, 01/01/2026
Throughout		Required	What is this RFP proposal number?	000
Throughout		Required	What date is this proposal being released? [month/day/year]	TBD
Section 1	NR 1	Required	What types of buses are being procured (short description) [insert everything that is being procured in this solicitation]	35-foot electric buses
Section 1	NR 2	Required	Who is the procurement officer to contact? [name of person from whom documents are obtained]	John Doe
Section 1	NR 2	Required	Where can the solicitation be picked up or responses shipped to? [location to obtain proposal document]	122 Main St.
Section 1	NR 2	Required	Where is the procurement available electronically? [electronic address]	transit-agency.com
Section 1	NR 3	Required	What date and time is this procurement due? [local time, day and date]	March 30, 2025 at 2 PM prevailing
Section 1	NR 3	Required	Sealed Proposals shall be submitted to [Agency contact, room and address] for courier delivery or hand delivery.	123 Main St.
Section 1	NR 3	Required	Sealed Proposals shall be submitted to [Agency contact, room and address, if different from above] by U.S. mail.	123 Main St.
Section 1	NR 4	Required	Proposals and subsequent offers shall be valid for a period of [specify time period, typically not fewer than 90 and not more than 180 days].	89 days.
Section 1, Section 2	NR 5	Required	A Pre-Proposal Meeting will be held on [day and date].	January 1, 2024
Section 1, Section 2	NR 5	Required	A Pre-Proposal Meeting will be held at [time].	9:01
Section 1, Section 2	NR 5	Required	A Pre-Proposal Meeting will be held at [meeting room name].	100
Section 1, Section 2	NR 5	Required	A Pre-Proposal Meeting will be held at [address of location].	110 Main St.
Section 1, Section 2	NR 5	Required	[call-in number and instructions] of the Pre-Proposal conference	215-100-1999
Section 1	NR 5	Required	Name: [name of Contracting Officer]	Contracting Officer's Contact Info
Section 1	NR 5	Required	Title: [title of Contracting Officer]	Contracting Officer's Contact Info
Section 1	NR 5	Required	Address: [address of Contracting Officer]	Contracting Officer's Contact Info
Section 1	NR 5	Required	Phone number: [phone number of Contracting Officer]	Contracting Officer's Contact Info
Section 1	NR 5	Required	Email: [email address of Contracting Officer]	Contracting Officer's Contact Info

The document panel on the right shows:

SECTION 1: NOTICE OF REQ

NR 1 Description of the Work
The Agency requests Proposals for the man... terms and conditions set forth in RFP «prop...

Specifically, the Agency is requesting the fo...

NR 2 Obtaining Proposal Doc
Proposal documents may be obtained from... or electronically, if available, at «procuremen... postage paid.

NR 3 Proposal Due Date and...
Proposals must be received by «procuremen...

1. Sealed Proposals shall be submitted...
   a. For courier delivery or han...
   b. By U.S. mail: «procuremen...

2. Envelopes or boxes containing Prop... number and the solicitation title: «p...

3. Proposers are requested to submit t... copies, and three CDs, each contain... discrepancies, the hard copy will be...

8 Step 3: Carefully go through each row.

9 Some rows require manual entry (e.g., specific requirements), while others offer pre-filled options or drop-downs to choose from. Some require both. Use the **Questions**, **Notes**, and **Suggestions** columns as guidance. Additional notes may appear as comments or tooltips when you hover over certain cells. For more

complex cases, example entries are provided.

Screenshot 1

tions	Your responses and selections	Resulting Text
Inat the your response in terms ctuation and paragragh		Not Applicable
(58)		
(59)	thirty (30)	thirty (30)
		Agency in accordance with this clause in whole, or from time part, whenever the Contracting Officer shall determine that s termination is in the best interest of the Agency. Any such ter shall be effected by delivery to the Contractor of a notice of t specifying the extent to which performance of work under the will be terminated, and the date upon which such terminatio effective. After receipt of a notice of termination, and except as otherw directed by the Contracting Officer, the Contractor shall do tl following: •Stop work under the contract on the date and to the extent s the notice of termination. •Place no further orders or subcontracts for materials, servic facilities, except as may be necessary for completion of the the work under the contract that is not terminated. •Terminate all orders and subcontracts to the extent that the the performance of work terminated by the notice of termina to the agency in the manner, at the times and to the extent d the contracting officer, all of the right, title and interest of th Contractor under the orders and subcontracts so terminated, case the Agency shall have the right to settle or pay any or al arising out of the termination of such orders and subcontract •Settle all outstanding liabilities and claims arising out of su termination of orders and subcontracts, with the approval or of the contracting officer, to the extent that they may require which approval or ratification shall be final for all the purpos
erally Funded Grants, a contract tion is required; however, that provision are not cy must substitute its own enience clause in the User column.		
(60)	DEFAULT - Default Clause	▼ ause.
(61)	ults and alternatives	ALT. - Final and Enforceable	The decision by the arbitrators shall be final and enforceable court having jurisdiction over the parties

| < | > | Introduction | Instructions | Input | Examples | + | : |

Ready   Accessibility: Investigate   Display Settings   80%   Page 2 of 7   English (United States)   Text Predictions: On

SECTION 1: NOTICE OF REQ

NR 1 Description of the Work

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postage paid.

NR 3 Proposal Due Date and

Proposals must be received by «procuremen

1. Sealed Proposals shall be submitted
   a. For courier delivery or han
   b. By U.S. mail: «procuremer

2. Envelopes or boxes containing Prop
   number and the solicitation title: «p

3. Proposers are requested to submit t
   copies, and three CDs, each contain
   discrepancies, the hard copy will be
   electronic version is provided for th
   be late if it is received by the Agen
   submission deadline may be rejecte

Screenshot 2 (duplicate)

10 Step 4: Once you're satisfied with your entries, save the Excel file and close both it and the template Word document.

Excel window (top):

AutoSave On — inputs_non_technical • Saved

File | Home | Insert | Draw | Page Layout | Formulas | Data | Review | View | Automate | Help | Acrobat | Table Design

Paste | Font | Alignment | Number | Conditional Formatting | Format as Table | Cell Styles | Cells | Editing | Sensitivity | Add-ins | Analyze Data | Copilot | Create a PDF

Clipboard | Styles | Sensitivity | Add-ins | Adobe Acr...

J61

Purple cells: Select an option from the drop-down list. Each option has a brief description. You can see the result of your selection in this column.

Some selections require you to type your desired statements. You can add them to this column. A yellow highlighted text will prompt you to enter your input in this column if required.

Resulting Text	User Input for Selections Requiring Manual Specifications
Not Applicable	
thirty (30)	
[Please enter your answer in the cell to the right]	Insert your answer here.
The decision by the arbitrators shall be final and enforceable in any court having jurisdiction over the parties	
⚠ Input is required ⚠	
Not Applicable	

Word window (top):

template_doc_non_technical • Last Modified: Just now

File | Home | Insert | Draw | Design | Layout | References

Paste | Arial | 36 | B I U | Paragraph

Clipboard | Font

SECTION 1: NOTICE OF REQ

NR 1 Description of the Work
The Agency requests Proposals for the man
terms and conditions set forth in RFP «prop
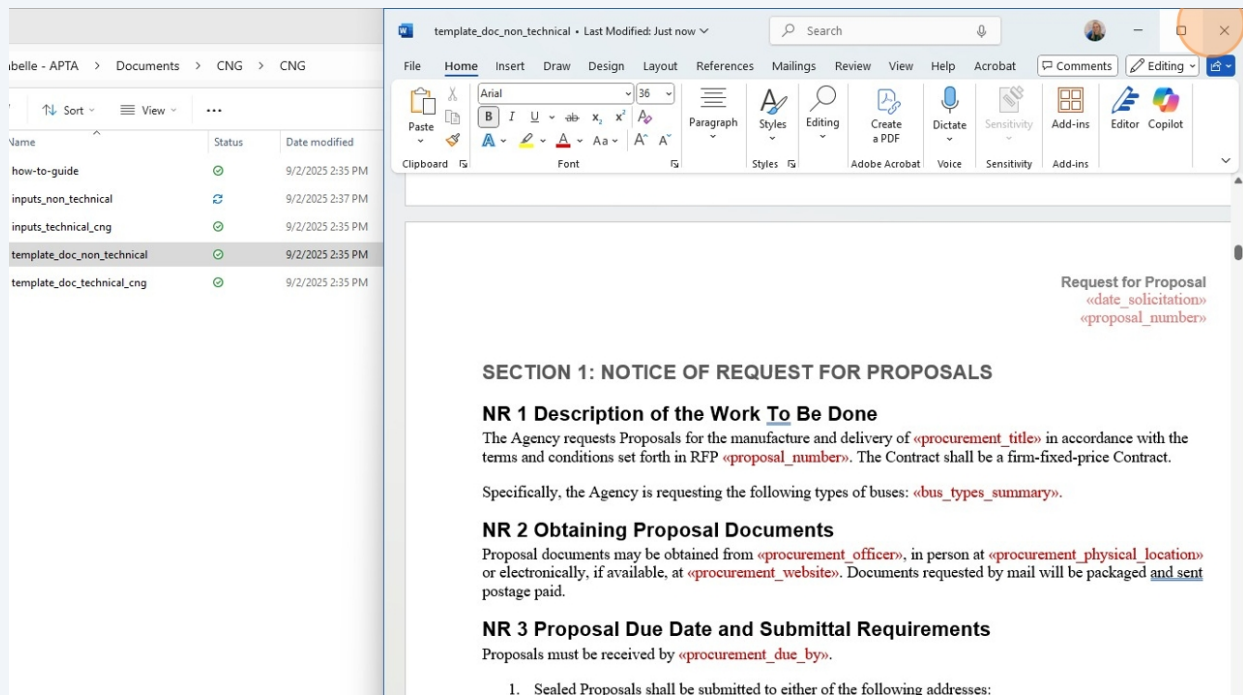
Specifically, the Agency is requesting the f

NR 2 Obtaining Proposal Doc
Proposal documents may be obtained from
or electronically, if available, at «procurem
postage paid.

NR 3 Proposal Due Date and
Proposals must be received by «procuremen
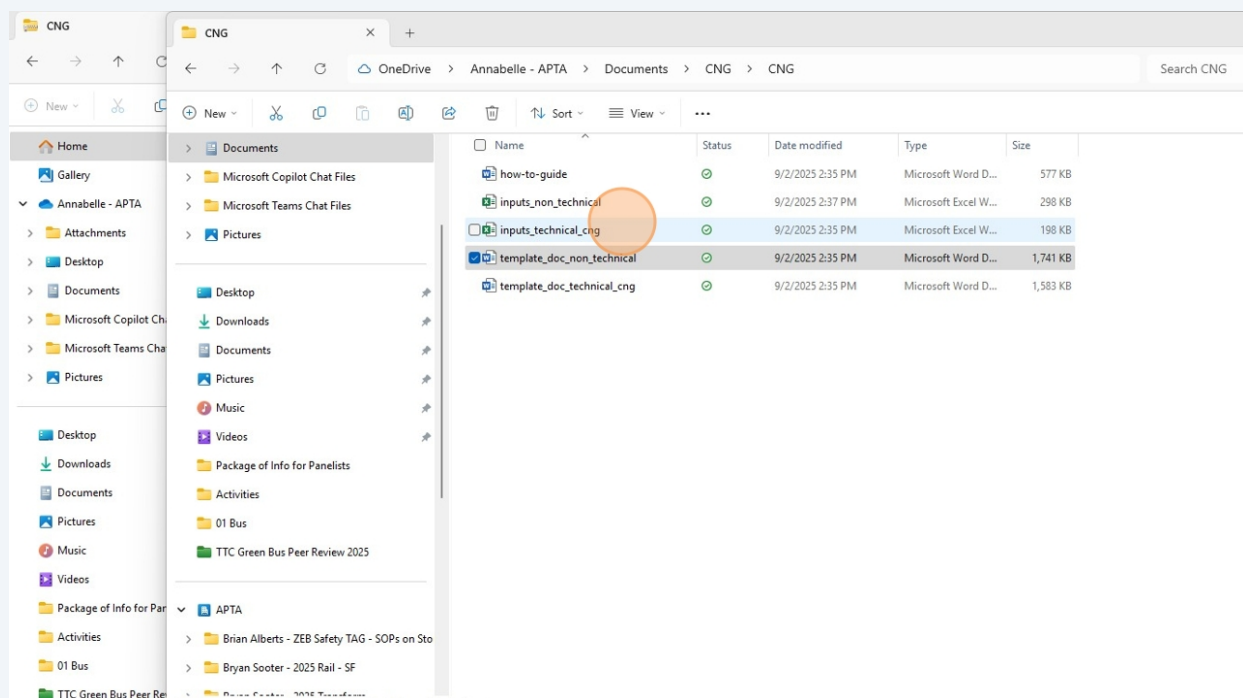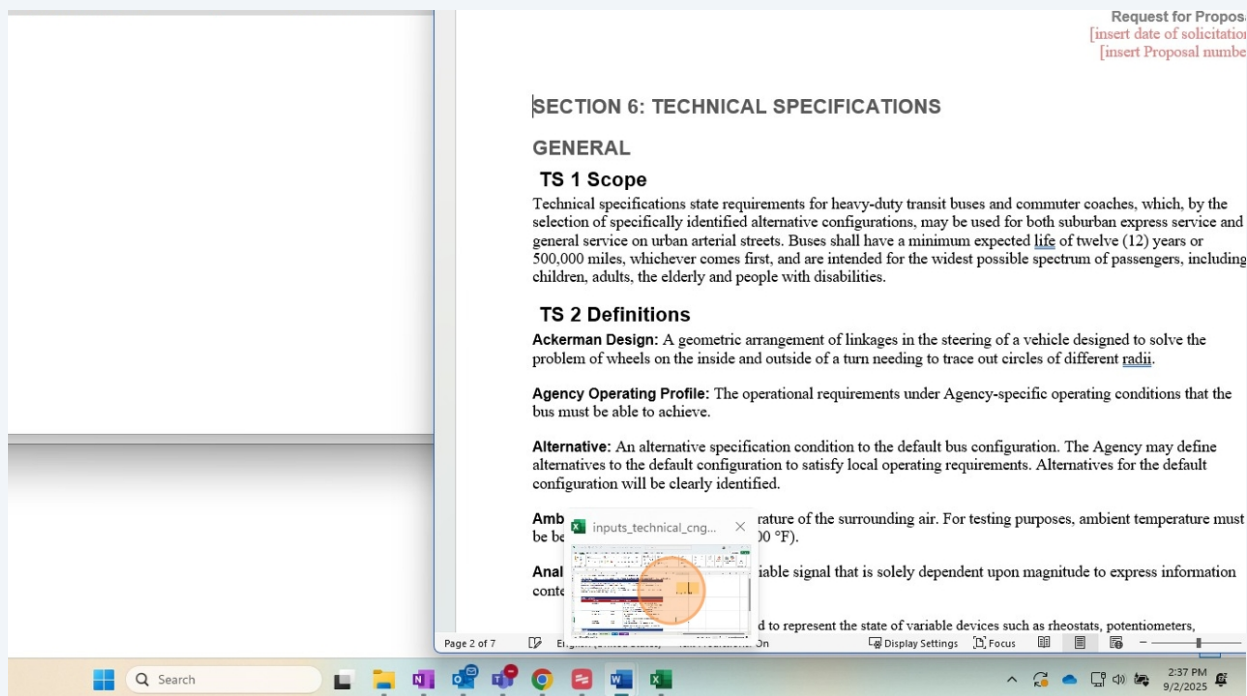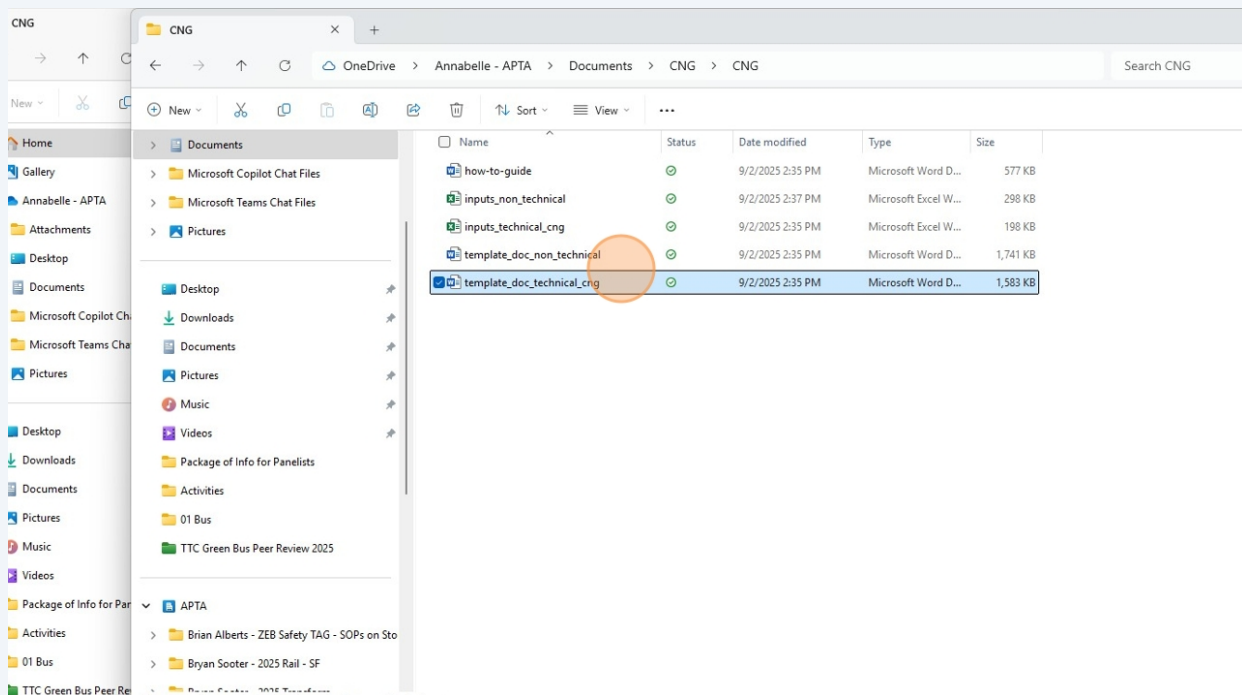
1. Sealed Proposals shall be submitted

Excel window (bottom):

inputs_non_technical • Saving...

ge Layout | Formulas | Data | Review | Automate | Help | Acrobat | Table Design

Number | Conditional Formatting | Format as Table | Cell Styles | Cells | Editing | Sensitivity | Add-ins | Analyze Data | Copilot | Create a PDF

Styles | Sensitivity | Add-ins | Adobe Acr...

rop-down list. Each option has a of your selection in this column.

Some selections require you to type your desired statements. You can add them to this column. A yellow highlighted text will prompt you to enter your input in this column if required.

	User Input for Selections Requiring Manual Specifications
the right]	Insert your answer here.
final and enforceable in any	

Word window (bottom):

template_doc_non_technical • Last Modified: Just now

File | Home | Insert | Draw | Design | Layout | References | Mailings | Review | View | Help

Paste | Arial | 36 | B I U | Paragraph | Styles | Editing | Create a PDF | Dictate

Clipboard | Font | Styles | Adobe Acrobat | Voice

SECTION 1: NOTICE OF REQUEST FOR PROPOSAL

NR 1 Description of the Work To Be Done
The Agency requests Proposals for the manufacture and delivery of «procuren
terms and conditions set forth in RFP «proposal_number». The Contract shall

Specifically, the Agency is requesting the following types of buses: «bus_type

NR 2 Obtaining Proposal Documents
Proposal documents may be obtained from «procurement_officer», in person a
or electronically, if available, at «procurement_website». Documents requeste
postage paid.

NR 3 Proposal Due Date and Submittal Requirement
Proposals must be received by «procurement_due_by».

1. Sealed Proposals shall be submitted to either of the following address

11 Next, configure the technical specifications,

Step 5: Repeat the same process with the technical documents. Open "inputs_technical" and "template_doc_technical".

Request for Propos:
[insert date of solicitation
[insert Proposal numbe

SECTION 6: TECHNICAL SPECIFICATIONS

GENERAL

TS 1 Scope

Technical specifications state requirements for heavy-duty transit buses and commuter coaches, which, by the selection of specifically identified alternative configurations, may be used for both suburban express service and general service on urban arterial streets. Buses shall have a minimum expected life of twelve (12) years or 500,000 miles, whichever comes first, and are intended for the widest possible spectrum of passengers, including children, adults, the elderly and people with disabilities.

TS 2 Definitions

Ackerman Design: A geometric arrangement of linkages in the steering of a vehicle designed to solve the problem of wheels on the inside and outside of a turn needing to trace out circles of different radii.

Agency Operating Profile: The operational requirements under Agency-specific operating conditions that the bus must be able to achieve.

Alternative: An alternative specification condition to the default bus configuration. The Agency may define alternatives to the default configuration to satisfy local operating requirements. Alternatives for the default configuration will be clearly identified.

Amb rature of the surrounding air. For testing purposes, ambient temperature must be be 0 °F).

Anal iable signal that is solely dependent upon magnitude to express information conte

d to represent the state of variable devices such as rheostats, potentiometers,

Page 2 of 7

12 Verify the fuel type selected.

13 Step 6: Again, place them side-by-side and go through the input rows. The technical section contains nearly twice as many entries, so you may want to complete it in multiple sessions. Be sure to **save your progress frequently**.

Once you've completed both Excel input files, follow the instructions in the Import Inputs to Contract Template with Mail Merge section or view the next demo.