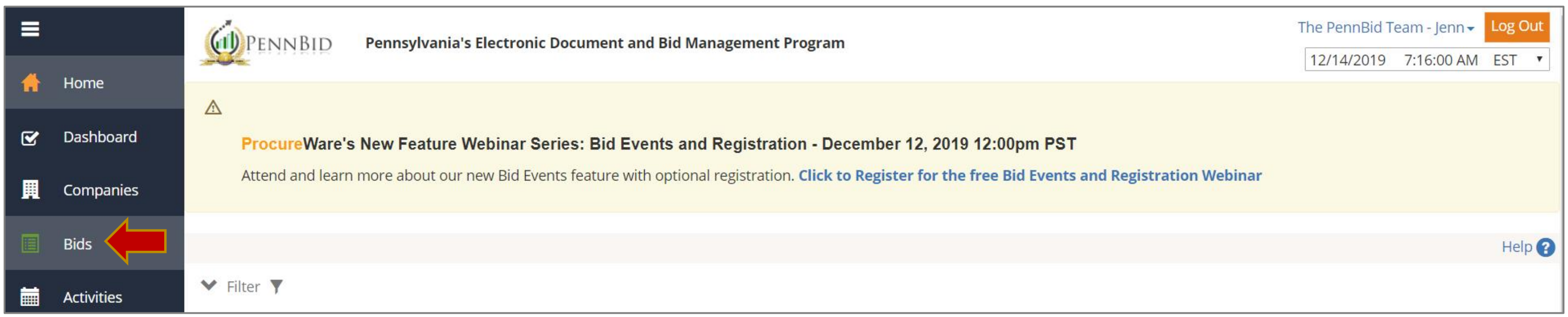
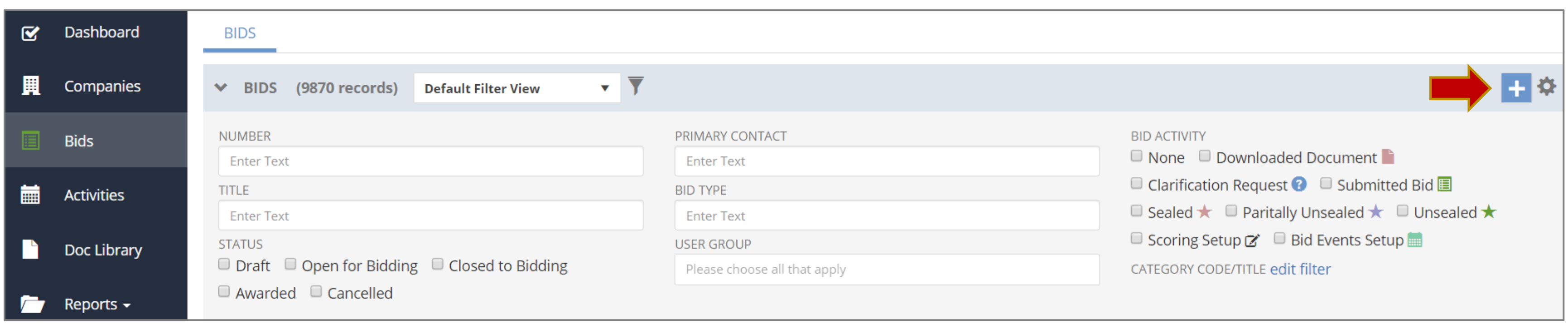
HOW TO SET UP A NEW PROJECT/SOLICITATION

Solicitation – A phase of the procurement process in which the posting agency actively solicits offers from competing suppliers through an invitation to bid or request for proposals.

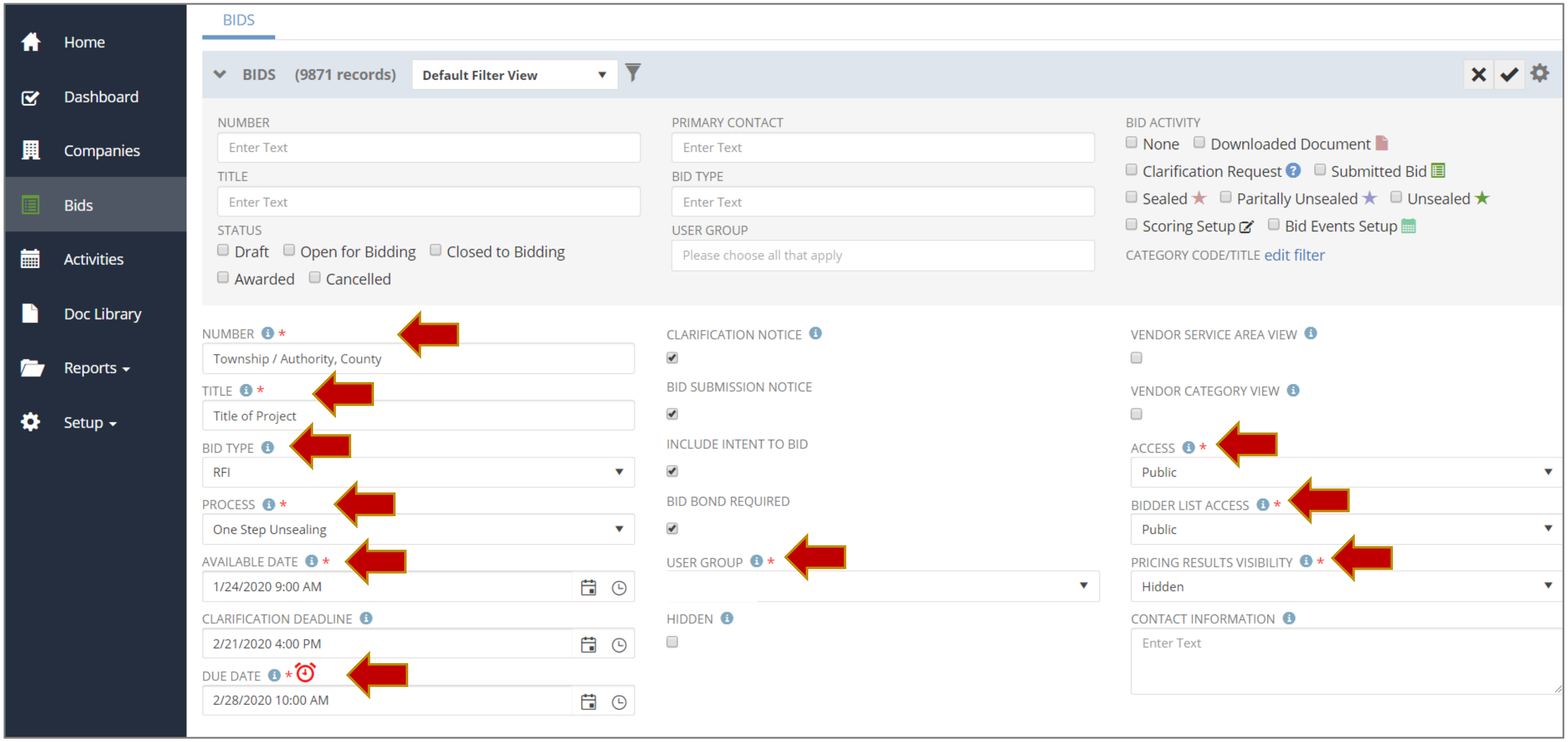
Setting Up a New Project – Part I

To begin, log in to PennBid and click Bids on the left toolbar. On the top blue toolbar, click the + icon on the right.





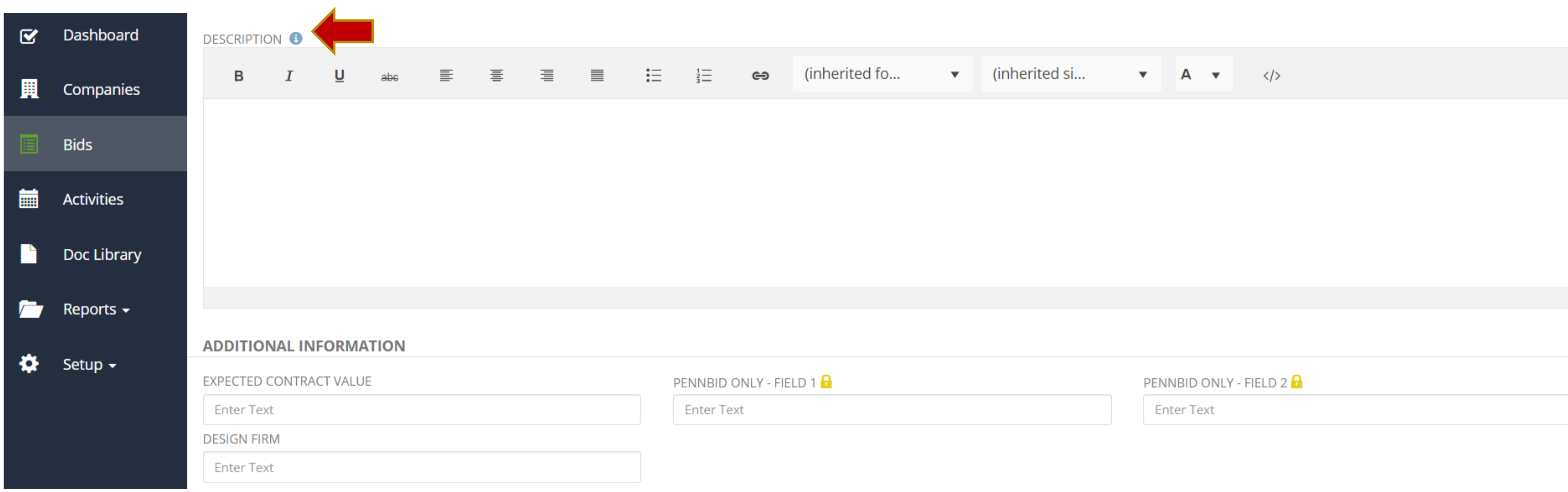
At a minimum, fill out all fields with an asterisk (*).



- In the **Number** field, enter the agency name and county. In the **Title** field, enter the project title.
- Project **Type** – Fixed Fee projects have a defined scope of work and are a one-time contract. This is largely all construction projects. Term contracts are on an as-needed basis or have a fixed amount of time (generally repeated) for a certain product, service or commodity. This includes snow plowing, grass cutting services, trash/recycling services, etc.

- The **Available Date** is when the project is set to go live. If you want the project to be visible immediately, simply change the date and time when ready. This field can be edited later.
- The **Clarification Deadline** is the cutoff date & time for bidders to ask questions.
- Check the **Bid Bond Required** box if the project requires a bid bond.
- Add the project **Description**. When you scroll down, there is a space for the project Description which often includes some or all of the public advertisement.

Note: The Description field has a 24,576 character limit. If you exceed the limit, please shorten your description.

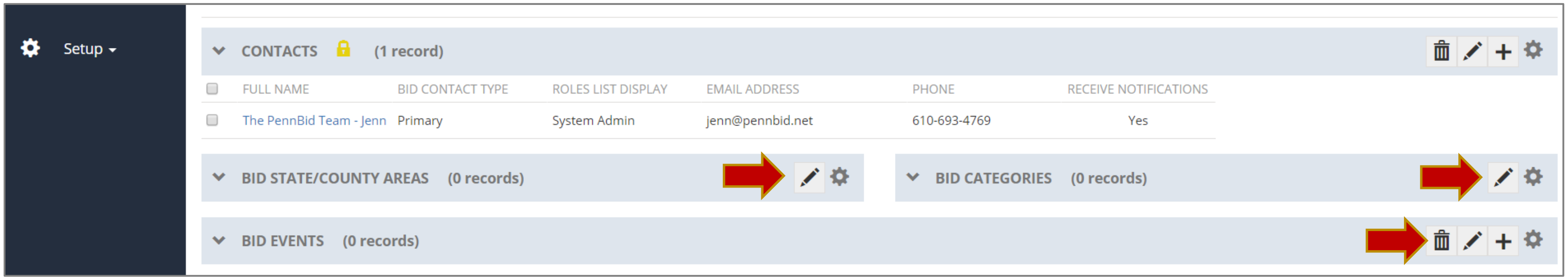


You can include an expected contract value and the design firm name if desired.
Note: Please leave the PennBid Only fields blank. We use these for QA/QC and internal office notes.

When finished, click the “check” box on the upper right toolbar.

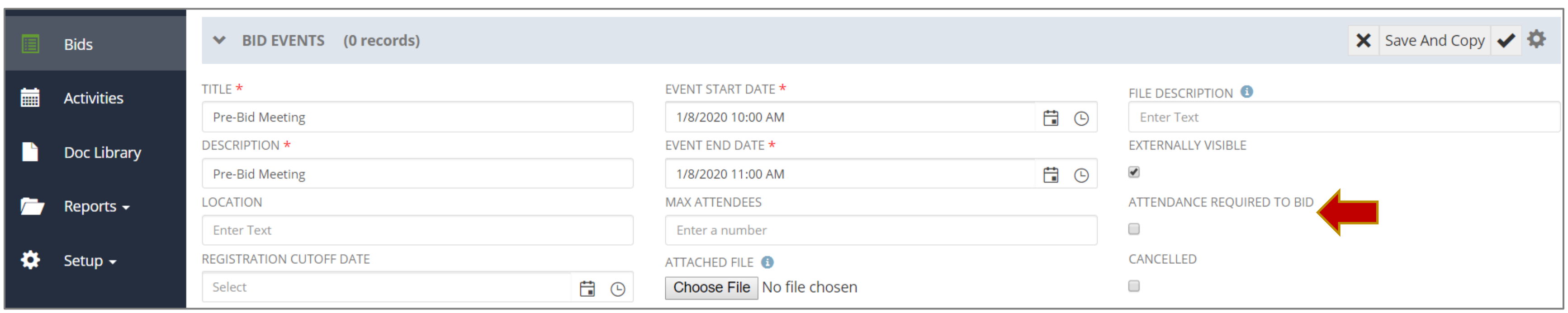
Setting Up a New Project – Part II

To add information about the project location (Bid State/County), type of work requested (NIGP Bid Categories) or to include a pre-bid meeting or other Bid Event, click the “pencil” icon or the + icon.



Note: If you leave the “Bid Categories” field blank, PennBid will populate the appropriate Category codes.

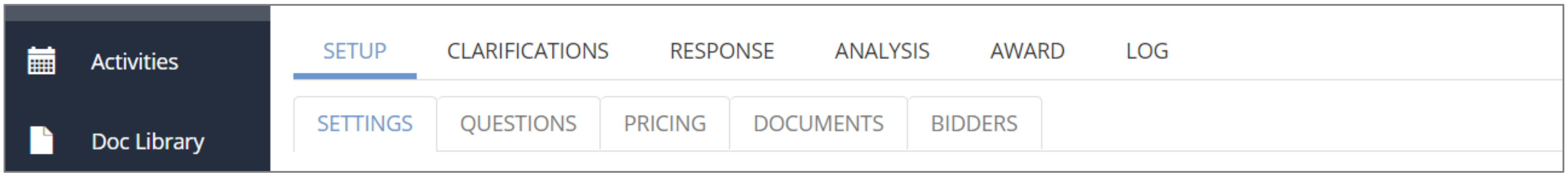
To create an Event (Pre-Bid Meeting, Walk Through, etc.) populate all required fields (*) and click the “check” box.



Note: Click the “Attendance Required to Bid” box if the Event is mandatory.

Setting Up a New Project – Part III

There are two primary sets of tabs for each project. The top set of tabs is used for managing your bid. The bottom set of tabs is used for the bid setup.



<u>Bottom Row Tabs</u>

The **Settings** tab includes all basic project information – title, due dates/times, pre-bid meeting information, etc.

The **Questions** and **Pricing** tabs are for questions (RFI), document uploads, and pricing line items that bidders must provide for bid submission. These two tabs basically make up the online bid form.

The **Documents** tab is where all bidding documents are uploaded.

<u>Top Row Tabs</u>

The **Clarifications** tab houses questions bidders ask about the project. This tab is used to answer bidder questions.

The **Response, Analysis, & Award** tabs are for viewing submitted bids and awarding the contract.

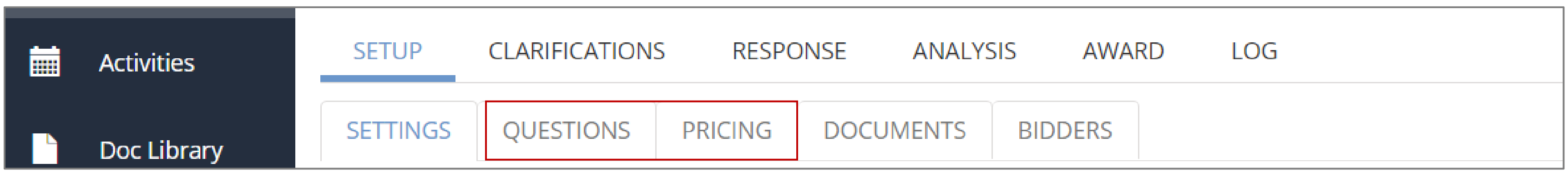
The **Log** tab keeps a record of all bid activity, including communications.

ESTABLISHING QUESTIONS & PRICING

THE ELEMENTS OF THE BID FORM

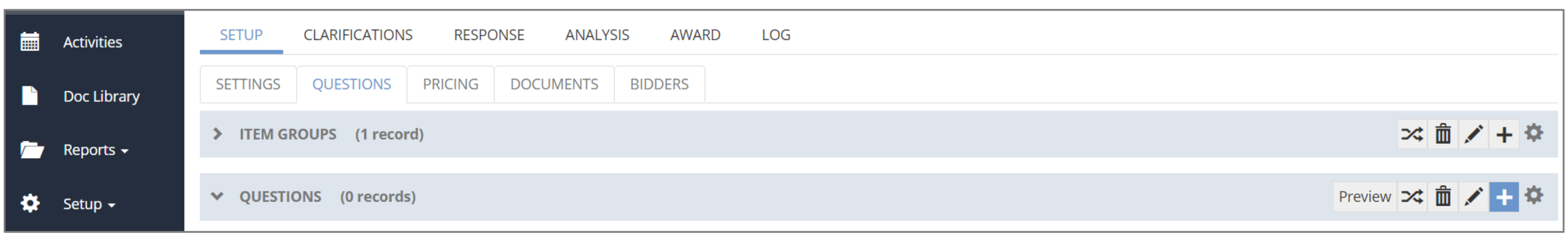
Bid Form – The form used to request answers, unit prices, documents or other materials for goods or services.
Note: This guide demonstrates how to establish a very basic online bid form. For more complicated or involved bid forms, including those with alternates and allowances, please see additional Bid Form training aides or contact PennBid.

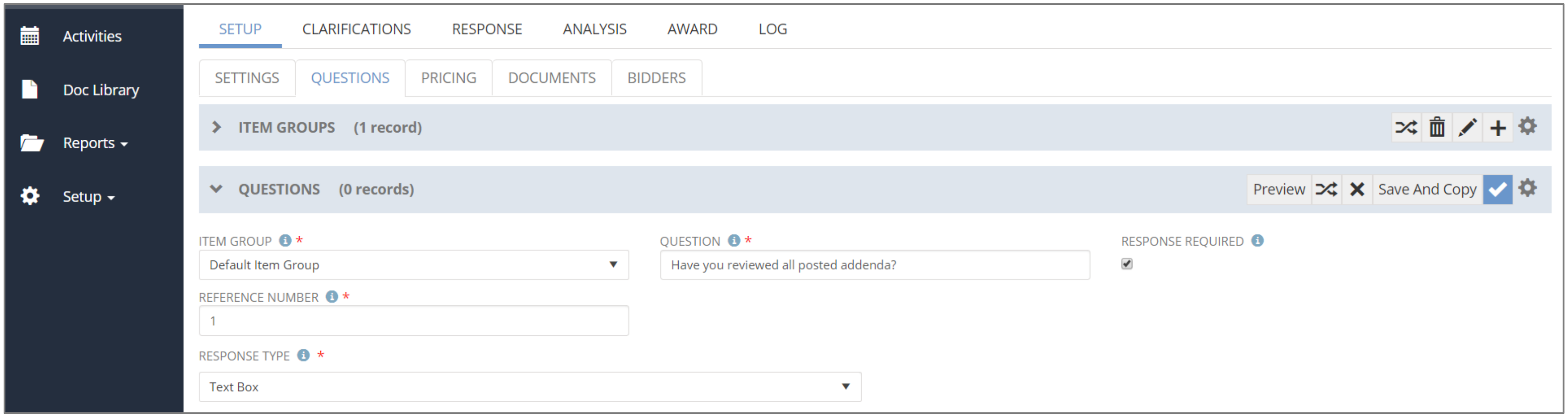
Most projects include **Questions (RFIs)** and **Pricing** to which the bidders must provide a response. Within a project, these two sections are located on the bottom set of tabs and are to the right of the Settings tab. They are below the Setup tab.



Setting Up Questions

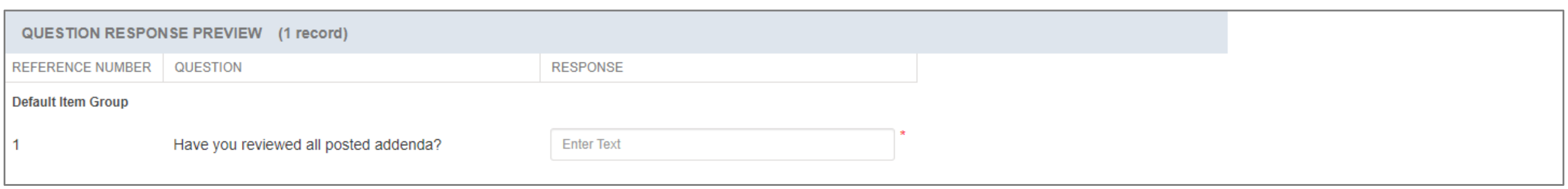
To add Questions, click the + icon on the right toolbar. Fill out the required fields (*) and click the "check" box to save.





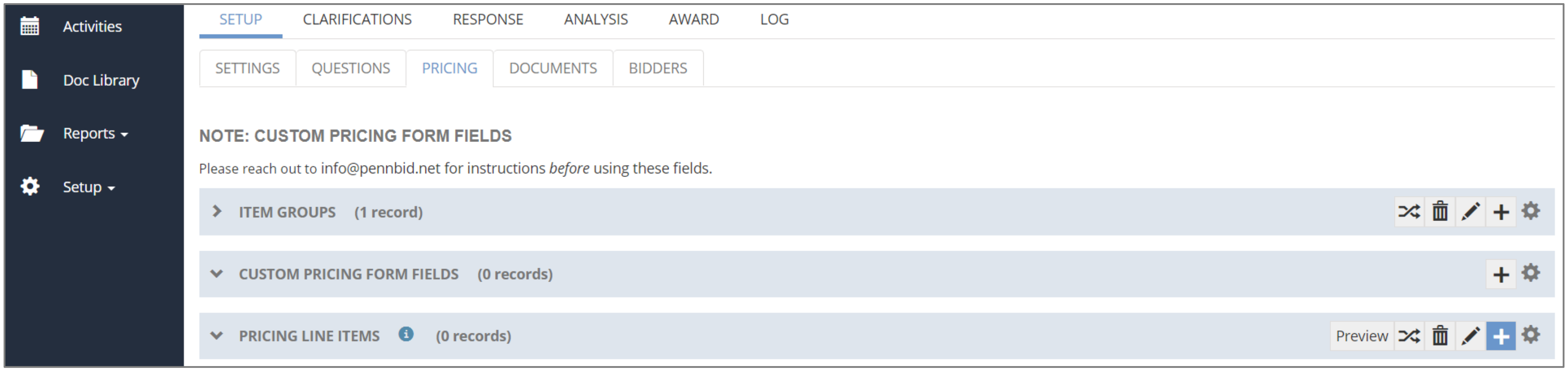
Note: Click the "Response Required" box if the question is mandatory. If this box is not checked, bidders may opt out of answering. You may change your preference on each question.

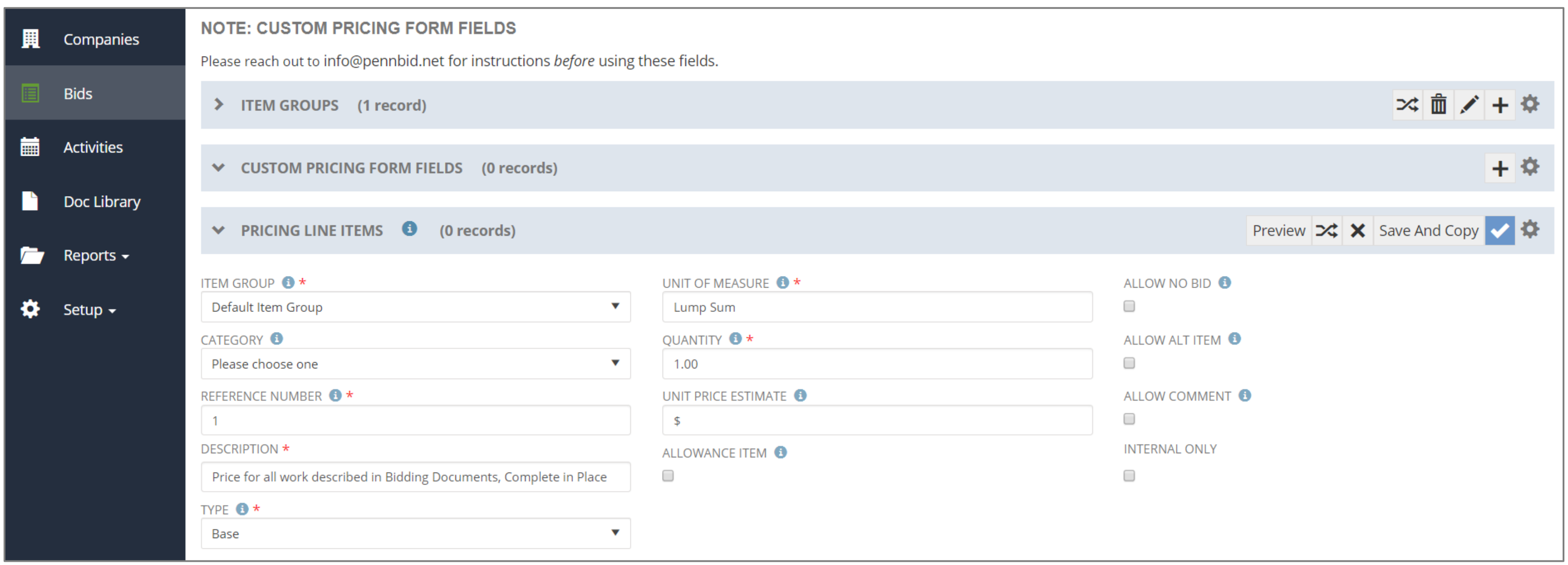
To see a preview of how your Question(s) appear to the Bidders, click the "Preview" button.



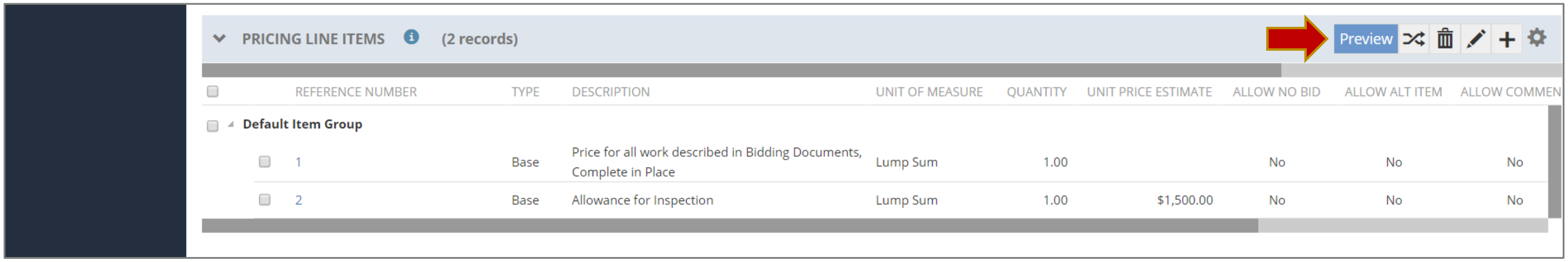
Setting Up a Pricing Form

To add Pricing, click the + icon on the right toolbar. Fill out the required fields (*) and click the “check” box to save.





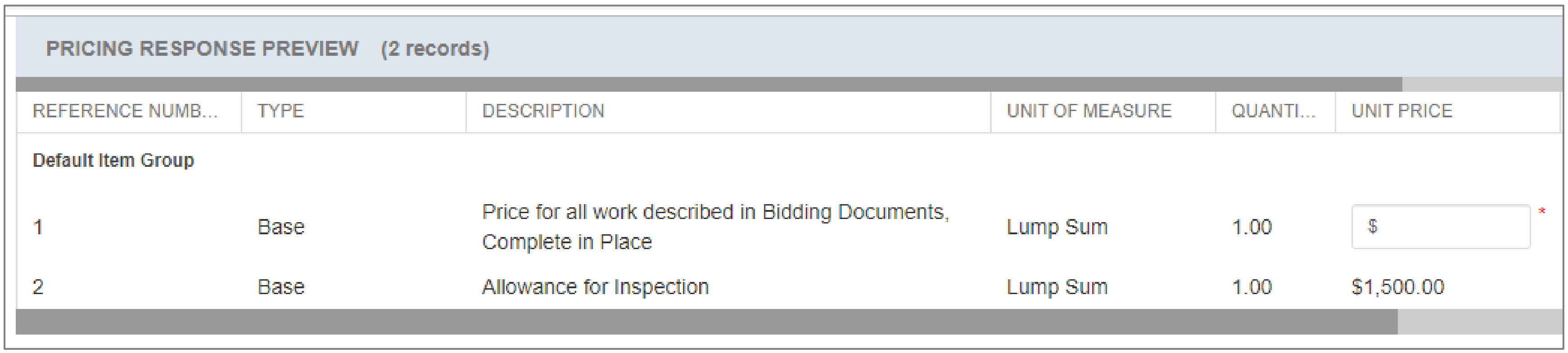
To see a preview of how your Pricing appears to the Bidders, click the “Preview” button.



PRICING LINE ITEMS (2 records)

Preview

REFERENCE NUMBER	TYPE	DESCRIPTION	UNIT OF MEASURE	QUANTITY	UNIT PRICE ESTIMATE	ALLOW NO BID	ALLOW ALT ITEM	ALLOW COMMEN
Default Item Group								
1	Base	Price for all work described in Bidding Documents, Complete in Place	Lump Sum	1.00		No	No	No
2	Base	Allowance for Inspection	Lump Sum	1.00	$1,500.00	No	No	No



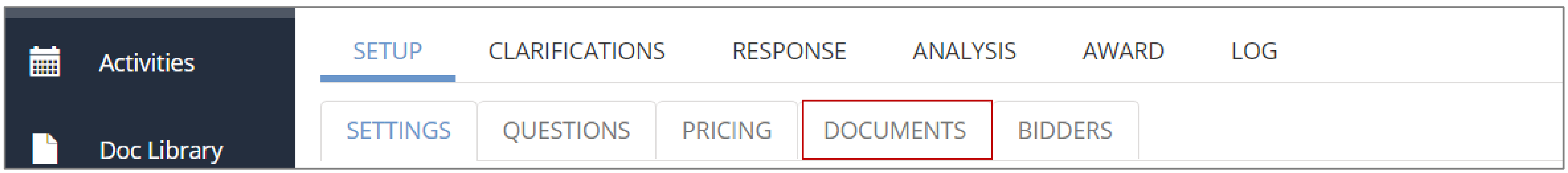
PRICING RESPONSE PREVIEW (2 records)

REFERENCE NUMB...	TYPE	DESCRIPTION	UNIT OF MEASURE	QUANTI...	UNIT PRICE
Default Item Group					
1	Base	Price for all work described in Bidding Documents, Complete in Place	Lump Sum	1.00	$ *
2	Base	Allowance for Inspection	Lump Sum	1.00	$1,500.00

PROJECT DOCUMENTS

Project Documents – The document(s) provided to bidders that are essential to the project. This includes, but is not limited to, the project manual, specifications, bidding requirements, invitation to bid, instructions to bidders, and project plans.

Within a project, the Documents tab is located on the bottom set of tabs and is to the right of the Pricing tab. This is below the Setup tab.

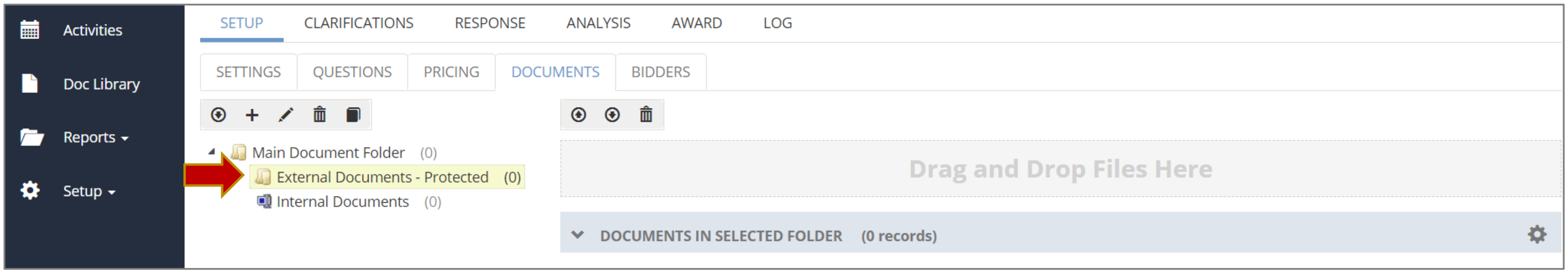


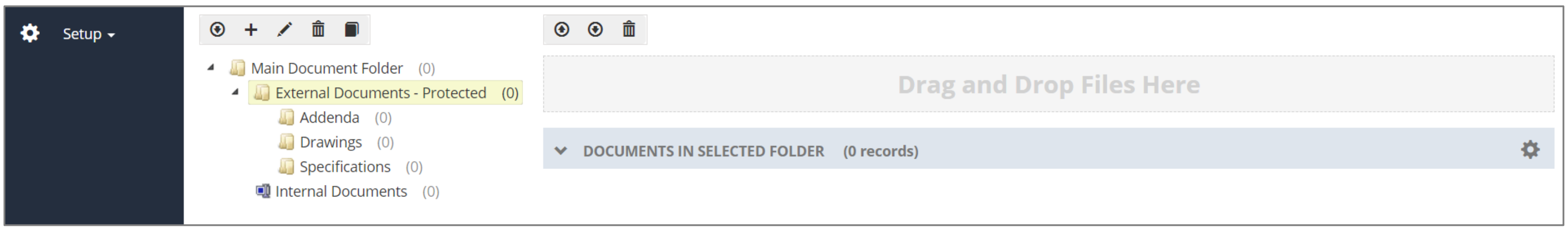
Setting Up Project Documents

There are two types of document folders available. **External Documents – Protected** is where project bidding documents will be uploaded. External means that others outside of your User Group (i.e. potential bidders) have access. Protected means that potential bidders must be logged in to access the files. **Internal Documents** are only accessible and viewable by your User Group.

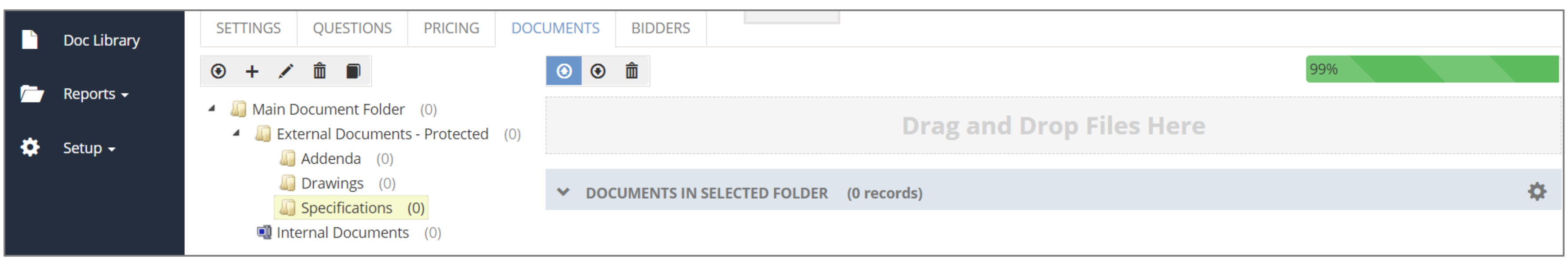
Note: Do not use **Internal Documents** for any documents you want to be available to bidders. They will not see these files.

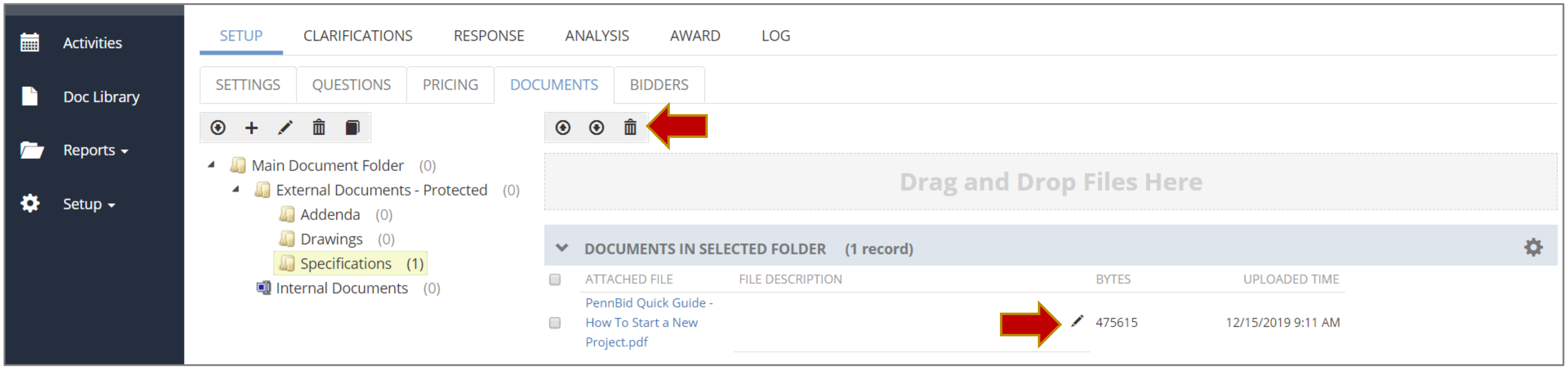
To set up your Document folder(s), highlight the **External Documents – Protected** folder and click the + icon. You can establish as many folders as needed. Name your folders and sub-folders as you add them.





When ready to upload documents, click on the desired folder. Either Drag and Drop files from your computer or click the "Upload" arrow.



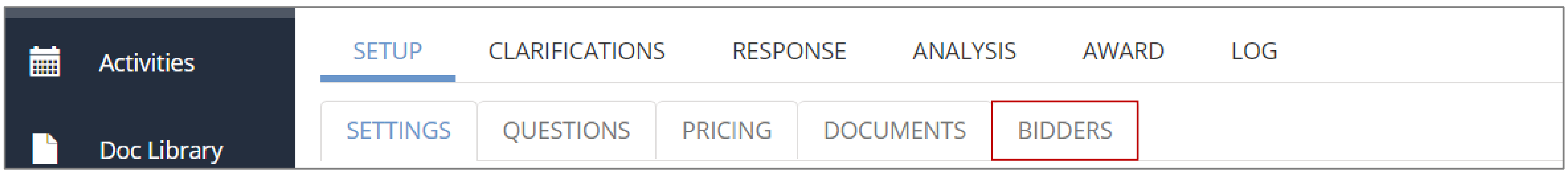


Once your file(s) are uploaded, you can see the file name, the file size and the date/time you uploaded. You can click the "pencil" icon to add a file description if desired. Click the "check box" next to the document name and then the "trash can" icon to delete a document.

VIEWING & MANAGING YOUR BIDDERS LIST

Bidders List – The list of vendors who added themselves to the plan holders list by downloading a document, asking a question or verifying their intent to bid.

Within a project, the Bidders tab is located on the bottom set of tabs and is to the right of the Documents tab. This is below the Setup tab.



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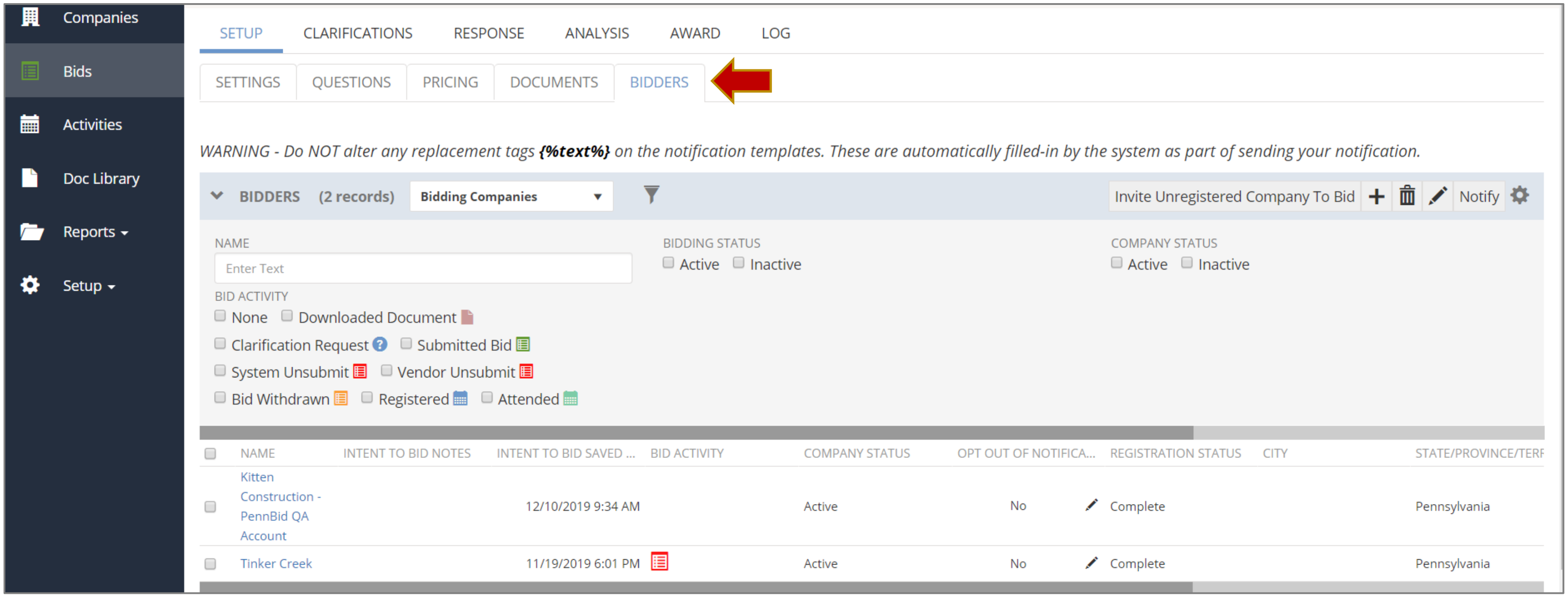
Viewing the Bidders List

To see which companies have been added to the bidders list, click on the **Bidders** tab and scroll down.

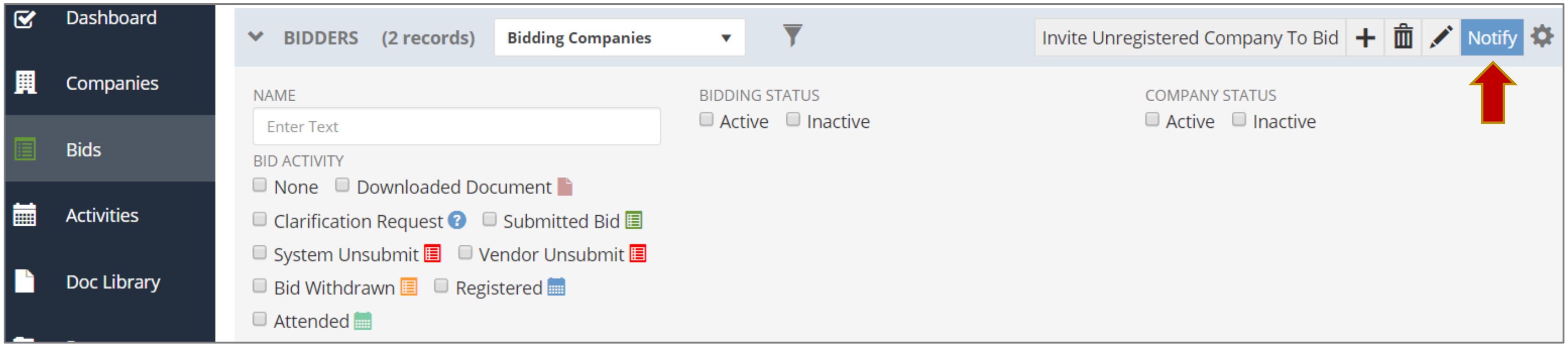


You will see the company name along with their company information and preferences. The system also tracks all bid activity on each project. The icons indicate bid activity.

To sort by bid activity, bidding status or company status, check the box next to the desired preferences. The system will return all relevant entries.

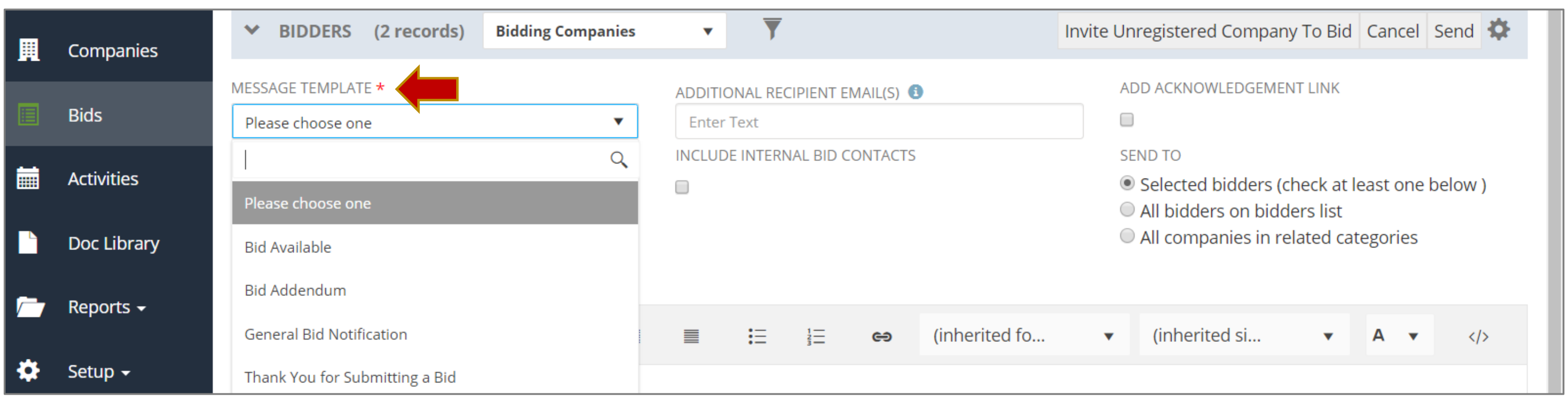
Communicating with Bidders

If you need to notify the bidders, typically when an addendum is issued, click the “Notify” button.



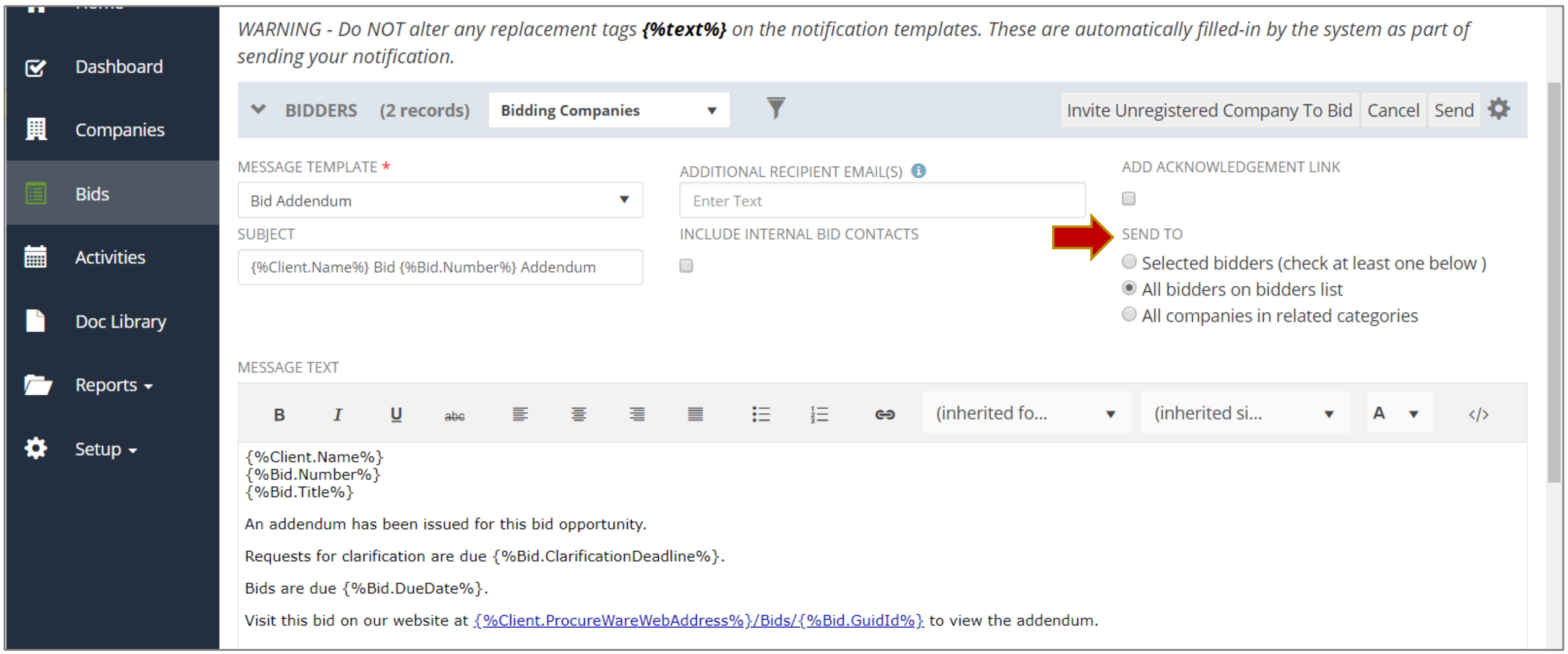
Select the appropriate Message Template from the drop-down menu. Once you select, text will populate in the Subject line and in the Message Text field.

Note: Do not alter or replace any tags {%text%} on the notification templates. These are automatically populated by the system to send your project notification.

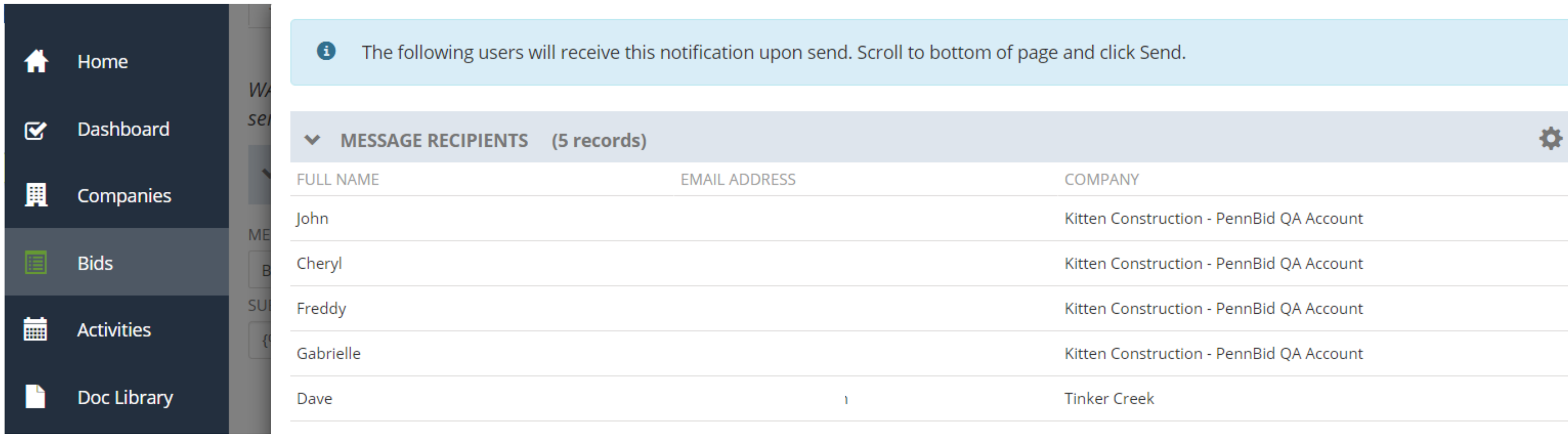


There are three “Send To” options. For notifying one bidder or a selected group of bidders, click the “Selected bidders” option and then check the bidders you wish to notify. To send a message to all bidders, like when issuing addenda, click the “All bidders on bidders list” option. To send an invitation to bid, click the “All companies in related categories” option.

Note: PennBid will send the invitation to bid automatically following bid opening. If you send the invitation, our office will not send the invitation to bid out.

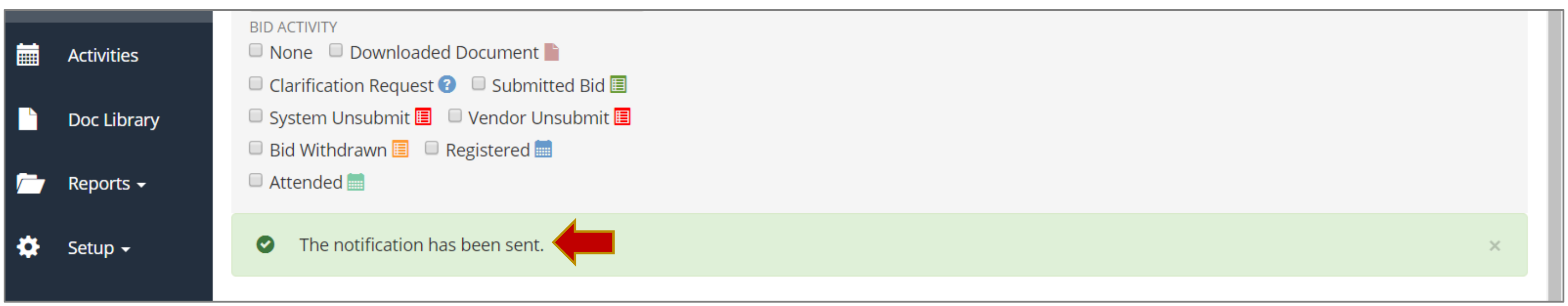


Once all fields have been populated, click the “Send” button. The system will generate a pop up to verify that the correct message recipients were chosen. If you made an error, click “Cancel.” If everything looks good, click “Send.”



Note: Full names and email addresses will also populate. They have been removed for this guide.

Once you send the notification, you will receive a confirmation message.

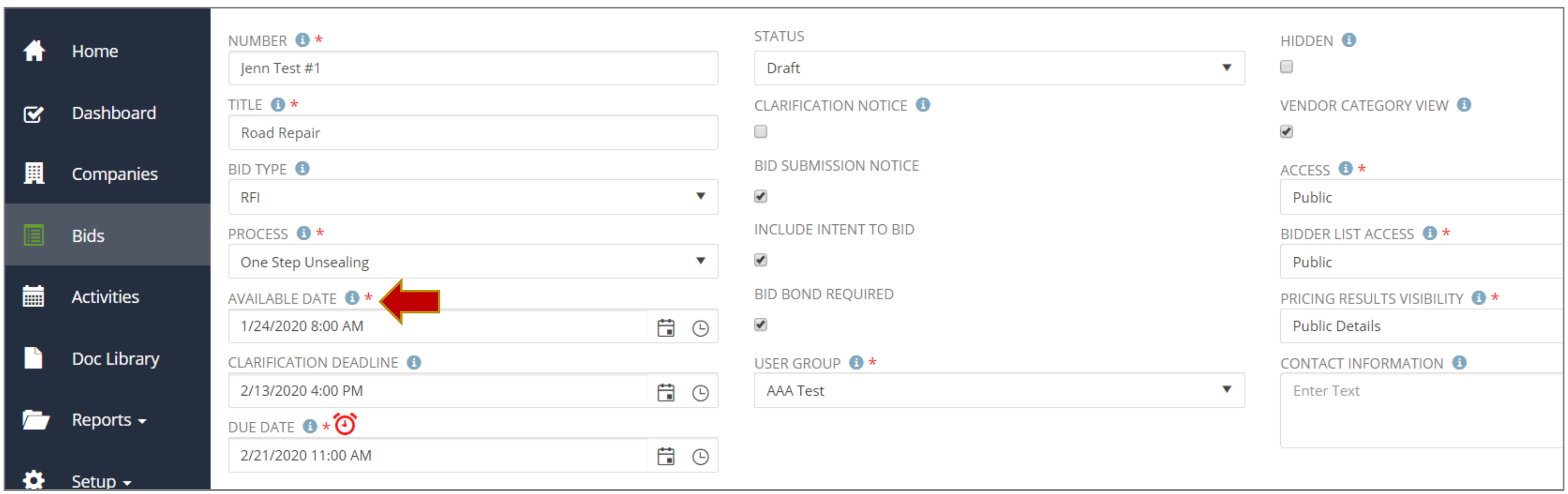


GOING LIVE

There are two ways to go live when you're ready to show your project. You can either set the project to become publicly visible when you finish setting it up or you can schedule the project to become available at a future date/time.

If you want to show the project right away, simply set the "Available Date" to today and set the time for a few minutes in the future. If you don't want the project to be visible immediately, pick an available date in the future.

Note: When the date/time that you selected as the "Available Date" arrives, the project will automatically become publicly visible to potential bidders. If you're not ready for the project to go live, simply push the date out.



If you have any questions about setting up your project, please contact the PennBid team. We're happy to assist!