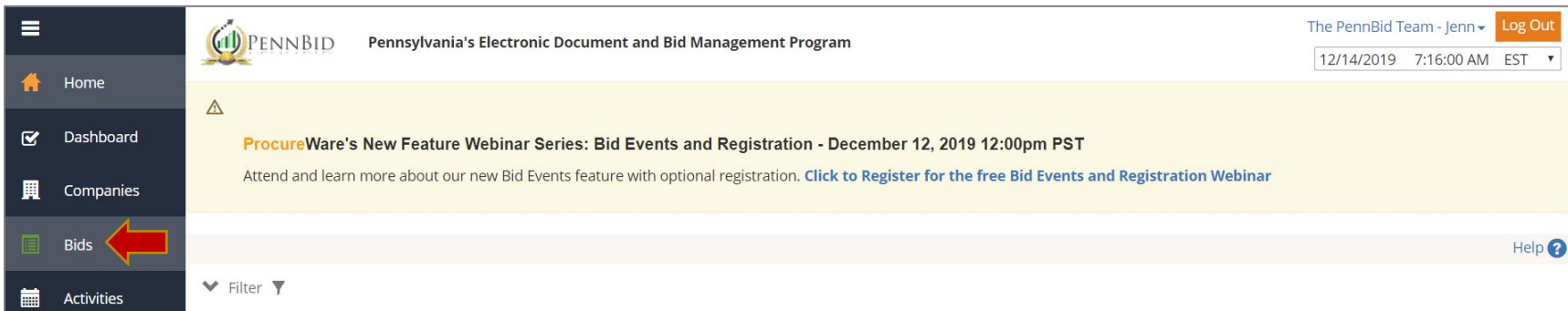


HOW TO SET UP A NEW PROJECT/SOLICITATION

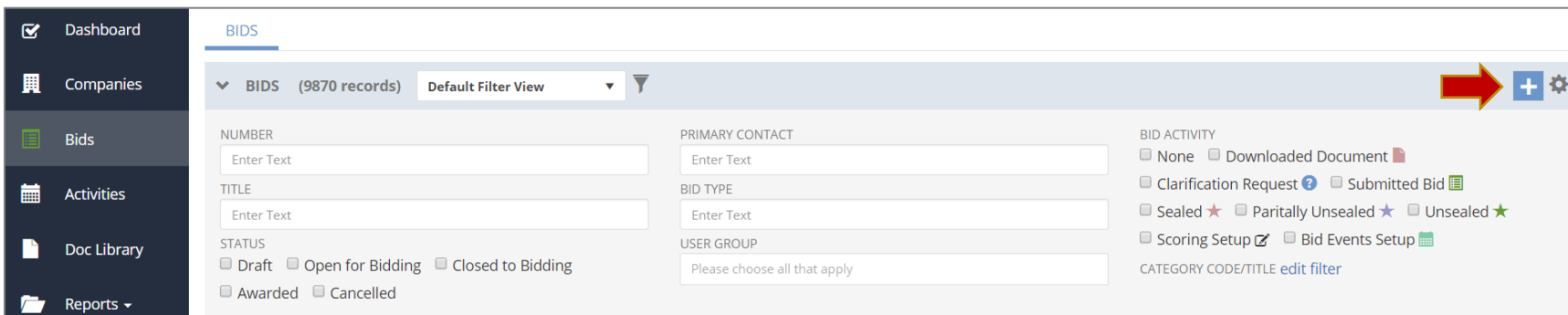
Solicitation – A phase of the procurement process in which the posting agency actively solicits offers from competing suppliers through an invitation to bid or request for proposals.

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.



The screenshot shows the PennBid home page. On the left sidebar, the 'Bids' menu item is highlighted with a red arrow. The top right of the page shows the user 'The PennBid Team - Jenn' and a 'Log Out' button. A yellow banner at the top contains the text: 'ProcureWare's New Feature Webinar Series: Bid Events and Registration - December 12, 2019 12:00pm PST. Attend and learn more about our new Bid Events feature with optional registration. [Click to Register for the free Bid Events and Registration Webinar](#)'.



The screenshot shows the 'BIDS' page in PennBid. The left sidebar has 'Bids' selected. The main content area shows a toolbar with a '+ icon' highlighted by a red arrow. Below the toolbar are several filter fields: NUMBER (Enter Text), TITLE (Enter Text), STATUS (Draft, Open for Bidding, Closed to Bidding, Awarded, Cancelled), PRIMARY CONTACT (Enter Text), BID TYPE (Enter Text), USER GROUP (Please choose all that apply), and BID ACTIVITY (None, Downloaded Document, Clarification Request, Submitted Bid, Sealed, Parially Unsealed, Unsealed, Scoring Setup, Bid Events Setup). There is also a 'CATEGORY CODE/TITLE edit filter' link.



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

The screenshot shows the PennBid BIDS form with several fields marked as required with an asterisk (*). Red arrows point to these fields:

- NUMBER: Township / Authority, County
- TITLE: Title of Project
- BID TYPE: RFI
- PROCESS: One Step Unsealing
- AVAILABLE DATE: 1/24/2020 9:00 AM
- CLARIFICATION DEADLINE: 2/21/2020 4:00 PM
- DUE DATE: 2/28/2020 10:00 AM
- ACCESS: Public
- BIDDER LIST ACCESS: Public
- PRICING RESULTS VISIBILITY: Hidden
- USER GROUP: (empty)

- 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.

The screenshot shows the PennBid web application interface. On the left is a dark sidebar with navigation options: Dashboard, Companies, Bids, Activities, Doc Library, Reports, and Setup. The main content area is titled 'DESCRIPTION' and features a rich text editor toolbar with options for Bold (B), Italic (I), Underline (U), text color (abc), background color, bulleted list, numbered list, link, and unlink. Below the toolbar is a large text input area. Underneath the description field is the 'ADDITIONAL INFORMATION' section, which contains four input fields: 'EXPECTED CONTRACT VALUE', 'DESIGN FIRM', 'PENN BID ONLY - FIELD 1', and 'PENN BID ONLY - FIELD 2'. A red arrow points to the 'DESCRIPTION' title.

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.

The screenshot shows the 'Setup' menu with the following sections:

- CONTACTS (1 record)**: Includes a table with columns: FULL NAME, BID CONTACT TYPE, ROLES LIST DISPLAY, EMAIL ADDRESS, PHONE, RECEIVE NOTIFICATIONS. One record is shown: 'The PennBid Team - Jenn' (Primary, System Admin, jenn@pennbid.net, 610-693-4769, Yes).
- BID STATE/COUNTY AREAS (0 records)**: A red arrow points to the edit icon.
- BID CATEGORIES (0 records)**: A red arrow points to the edit icon.
- BID EVENTS (0 records)**: A red arrow points to the add 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.

The screenshot shows the 'BID EVENTS (0 records)' form with the following fields:

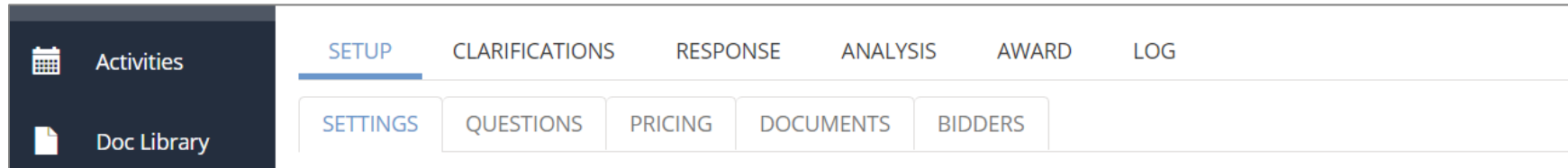
- TITLE ***: Pre-Bid Meeting
- DESCRIPTION ***: Pre-Bid Meeting
- LOCATION**: Enter Text
- REGISTRATION CUTOFF DATE**: Select
- EVENT START DATE ***: 1/8/2020 10:00 AM
- EVENT END DATE ***: 1/8/2020 11:00 AM
- MAX ATTENDEES**: Enter a number
- ATTACHED FILE**: Choose File (No file chosen)
- FILE DESCRIPTION**: Enter Text
- EXTERNALLY VISIBLE**:
- ATTENDANCE REQUIRED TO BID**: (Red arrow points to this checkbox)
- CANCELLED**:

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.



Bottom Row Tabs

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.

Top Row Tabs

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.

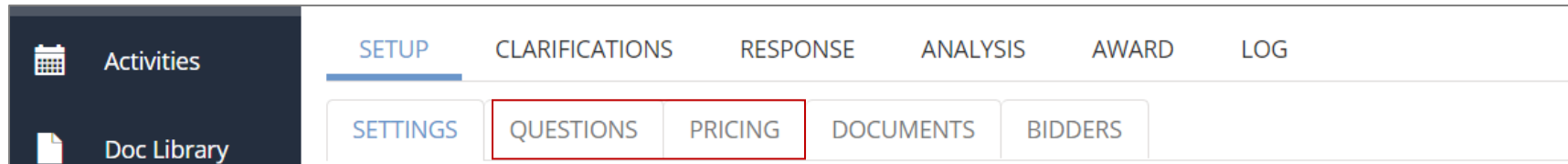
ESTABLISHING QUESTIONS & PRICING

THE ELEMENTS OF THE BID FORM

Bid Form – The form used to request answers, unit prices, documents or other materials for goods or services.

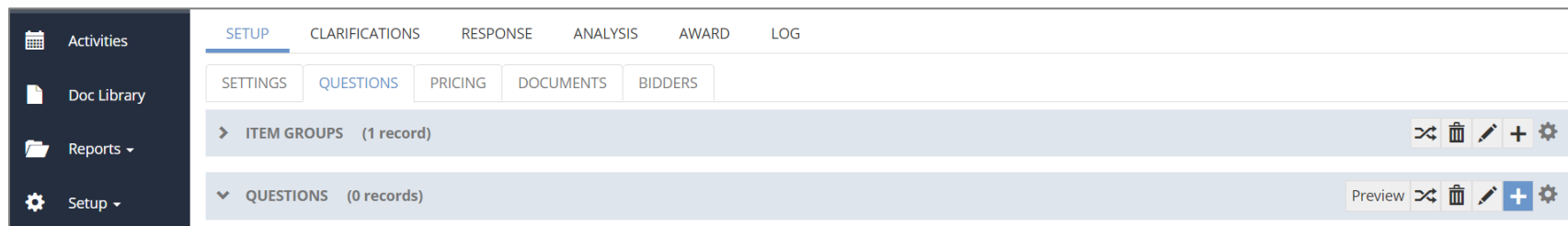
Note: This guide demonstrates how to establish a very basic online bid form. For more complicated or involved bid forms, including those with alternates and allowances, please see additional Bid Form training aides or contact PennBid.

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.



[SETUP](#) [CLARIFICATIONS](#) [RESPONSE](#) [ANALYSIS](#) [AWARD](#) [LOG](#)

[SETTINGS](#) [QUESTIONS](#) [PRICING](#) [DOCUMENTS](#) [BIDDERS](#)

> ITEM GROUPS (1 record) 🔄 🗑️ ✎️ + ⚙️

▼ QUESTIONS (0 records) Preview 🔄 ✕ Save And Copy ✓ ⚙️

ITEM GROUP ⓘ *
 Default Item Group

QUESTION ⓘ *
 Have you reviewed all posted addenda?

RESPONSE REQUIRED ⓘ

REFERENCE NUMBER ⓘ *
 1

RESPONSE TYPE ⓘ *
 Text Box

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.

▼ QUESTIONS (1 record) Preview 🔄 🗑️ ✎️ + ⚙️

REFERENCE NUMBER	QUESTION	RESPONSE REQUIRED	RESPONSE TYPE
1	Have you reviewed all posted addenda?	Yes	Text Box

QUESTION RESPONSE PREVIEW (1 record)

REFERENCE NUMBER	QUESTION	RESPONSE
1	Have you reviewed all posted addenda?	Enter Text *



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.

ACTIVITIES | SETUP | CLARIFICATIONS | RESPONSE | ANALYSIS | AWARD | LOG

SETTINGS | QUESTIONS | **PRICING** | DOCUMENTS | BIDDERS

NOTE: CUSTOM PRICING FORM FIELDS
Please reach out to info@pennbid.net for instructions *before* using these fields.

- ITEM GROUPS (1 record) [Refresh] [Delete] [Edit] [Add] [Settings]
- CUSTOM PRICING FORM FIELDS (0 records) [Add] [Settings]
- PRICING LINE ITEMS ⓘ (0 records) [Preview] [Refresh] [Delete] [Edit] [Add] [Settings]

COMPANIES | BIDS | ACTIVITIES | DOC LIBRARY | REPORTS | SETUP

NOTE: CUSTOM PRICING FORM FIELDS
Please reach out to info@pennbid.net for instructions *before* using these fields.

- ITEM GROUPS (1 record) [Refresh] [Delete] [Edit] [Add] [Settings]
- CUSTOM PRICING FORM FIELDS (0 records) [Add] [Settings]
- PRICING LINE ITEMS ⓘ (0 records) [Preview] [Refresh] [Close] [Save And Copy] [Check] [Settings]

ITEM GROUP ⓘ *
Default Item Group

CATEGORY ⓘ
Please choose one

REFERENCE NUMBER ⓘ *
1

DESCRIPTION *
Price for all work described in Bidding Documents, Complete in Place

TYPE ⓘ *
Base

UNIT OF MEASURE ⓘ *
Lump Sum

QUANTITY ⓘ *
1.00

UNIT PRICE ESTIMATE ⓘ
\$

ALLOWANCE ITEM ⓘ

ALLOW NO BID ⓘ

ALLOW ALT ITEM ⓘ






ALLOW COMMENT ⓘ

INTERNAL ONLY



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 COMMENT
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

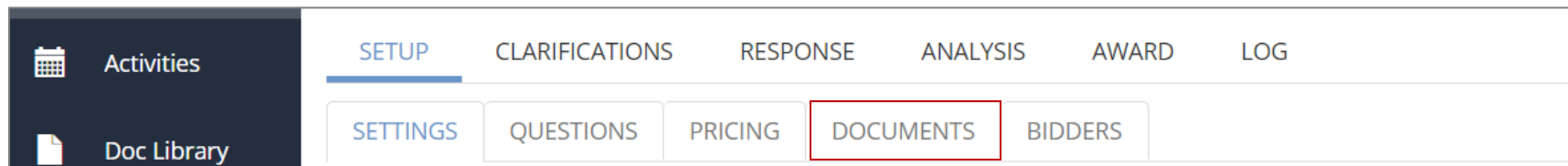
PRICING RESPONSE PREVIEW (2 records)

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	\$ <input type="text"/> *
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.



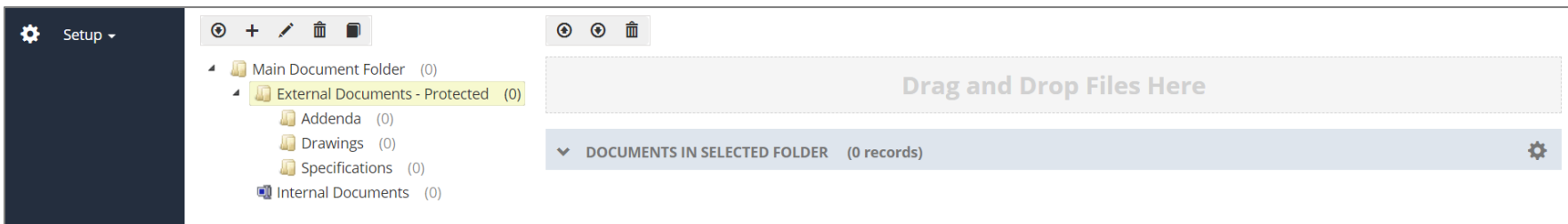
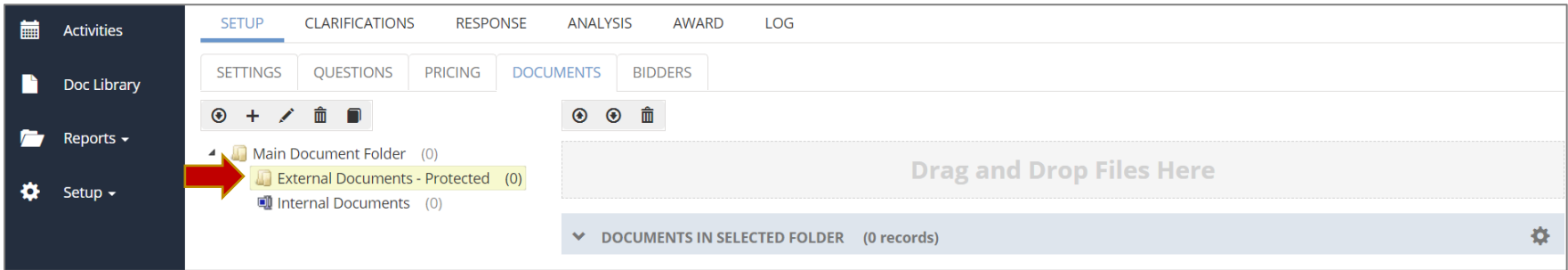
Setting Up Project Documents

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.

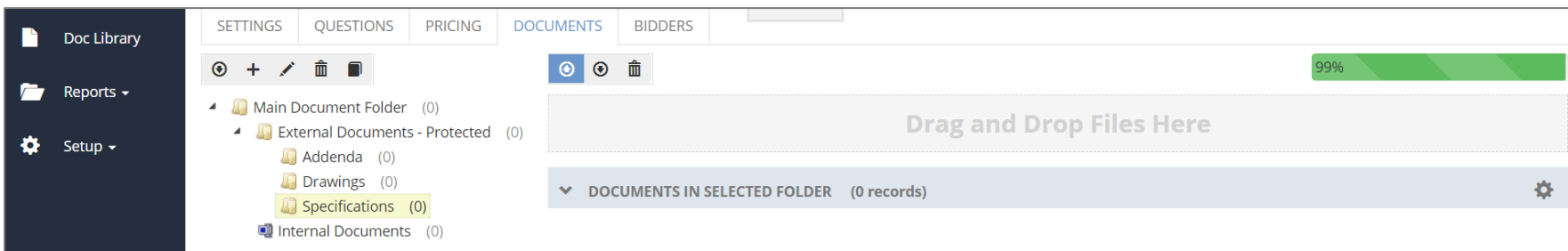
Note: Do not use **Internal Documents** for any documents you want to be available to bidders. They will not see these files.

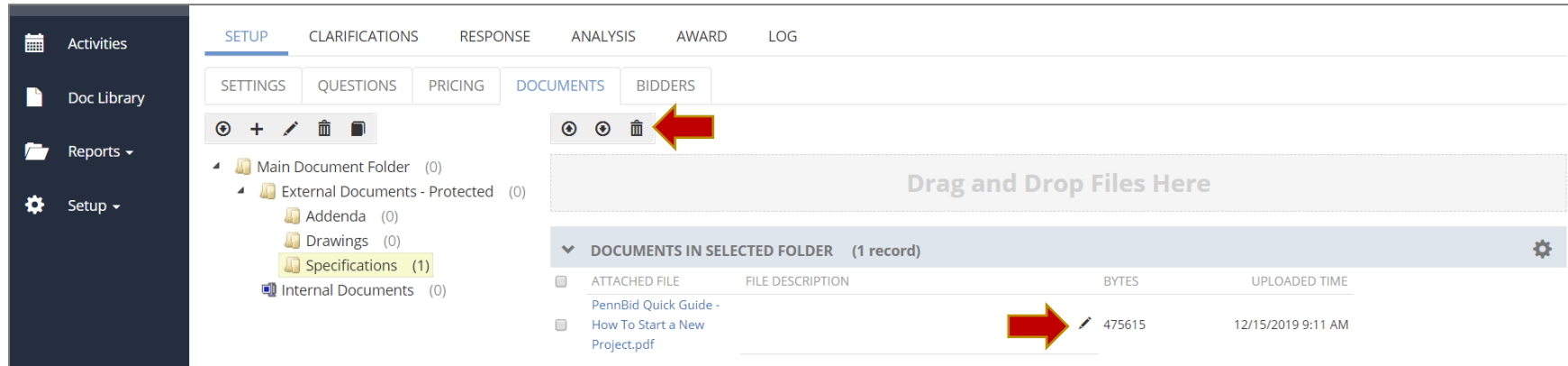


To set up your Document folder(s), highlight the **External Documents – Protected** folder and click the + icon. You can establish as many folders as needed. Name your folders and sub-folders as you add them.



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



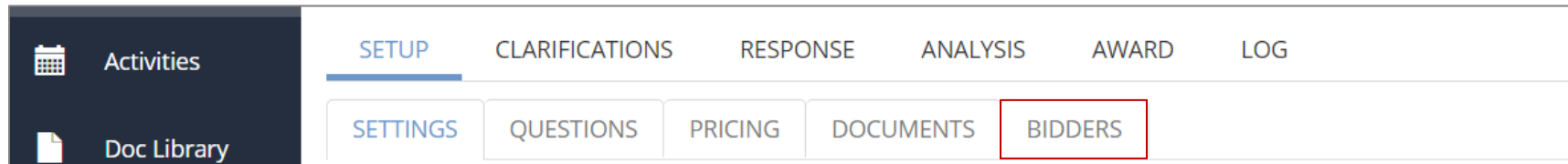


Once your file(s) are uploaded, you can see the file name, the file size and the date/time you uploaded. You can click the “pencil” icon to add a file description if desired. Click the “check box” next to the document name and then the “trash can” icon to delete a document.

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.





Viewing the Bidders List

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

WARNING - Do NOT alter any replacement tags **{%text%}** on the notification templates. These are automatically filled-in by the system as part of sending your notification.

BIDDERS (2 records) Bidding Companies

Invite Unregistered Company To Bid + [trash] [edit] Notify [gear]

NAME: Enter Text
BIDDING STATUS: Active Inactive
COMPANY STATUS: Active Inactive

BID ACTIVITY:
 None Downloaded Document
 Clarification Request Submitted Bid
 System Unsubmit Vendor Unsubmit
 Bid Withdrawn Registered Attended

NAME	INTENT TO BID NOTES	INTENT TO BID SAVED ...	BID ACTIVITY	COMPANY STATUS	OPT OUT OF NOTIFICA...	REGISTRATION STATUS	CITY	STATE/PROVINCE/TERF
Kitten Construction - PennBid QA Account		12/10/2019 9:34 AM		Active	No	Complete		Pennsylvania
Tinker Creek		11/19/2019 6:01 PM		Active	No	Complete		Pennsylvania

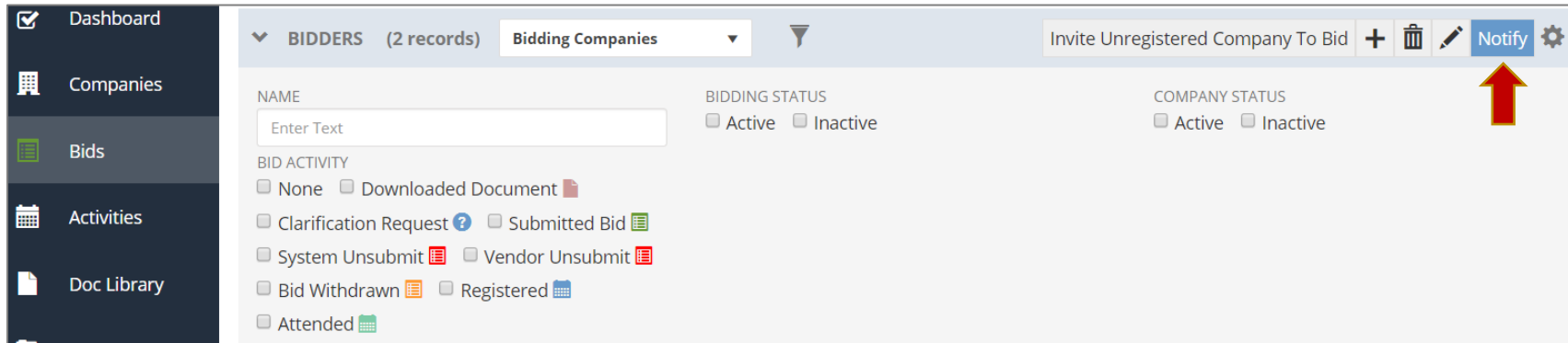
You will see the company name along with their company information and preferences. The system also tracks all bid activity on each project. The icons indicate bid activity.

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.



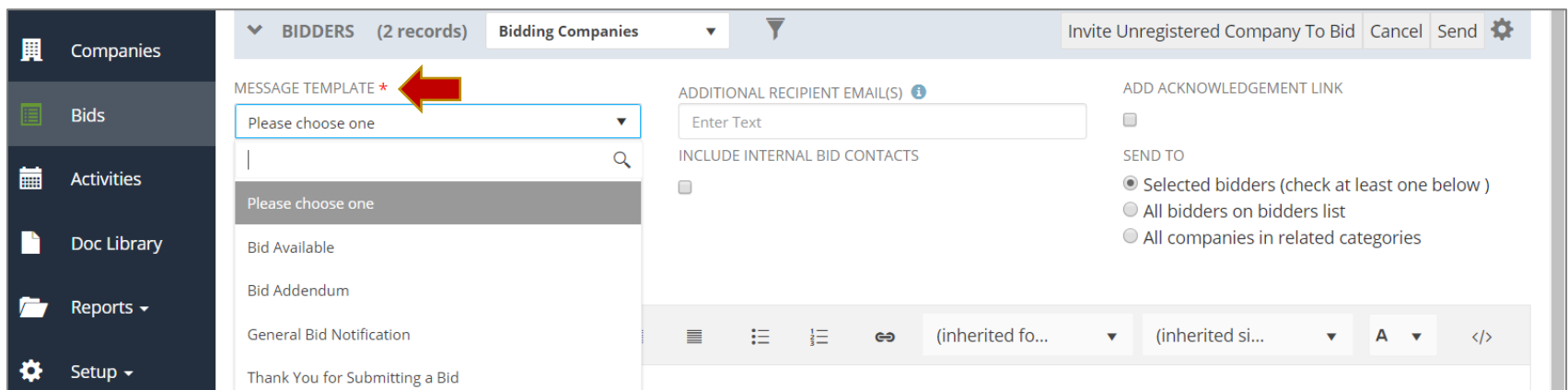
Communicating with Bidders

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.

WARNING - Do NOT alter any replacement tags **{%text%}** on the notification templates. These are automatically filled-in by the system as part of sending your notification.

BIDDERS (2 records) Bidding Companies [Filter Icon] Invite Unregistered Company To Bid Cancel Send [Settings Icon]

MESSAGE TEMPLATE *
Bid Addendum

ADDITIONAL RECIPIENT EMAIL(S) [Info Icon]
Enter Text

ADD ACKNOWLEDGEMENT LINK

SUBJECT
{%Client.Name%} Bid {%Bid.Number%} Addendum

INCLUDE INTERNAL BID CONTACTS

SEND TO
 Selected bidders (check at least one below)
 All bidders on bidders list
 All companies in related categories

MESSAGE TEXT

B I U abc [List Icons] [Link Icon] (inherited fo... (inherited si... **A** </>

{%Client.Name%}
{%Bid.Number%}
{%Bid.Title%}

An addendum has been issued for this bid opportunity.
Requests for clarification are due {%Bid.ClarityDeadline%}.
Bids are due {%Bid.DueDate%}.
Visit this bid on our website at [.{%Client.ProcureWareWebAddress%}/Bids/{%Bid.GuidId%}]({%Client.ProcureWareWebAddress%}/Bids/{%Bid.GuidId%}) to view the addendum.



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.”

The screenshot shows a sidebar on the left with navigation options: Home, Dashboard, Companies, Bids, Activities, and Doc Library. The main content area features a light blue information banner at the top stating: "The following users will receive this notification upon send. Scroll to bottom of page and click Send." Below this is a table titled "MESSAGE RECIPIENTS (5 records)" with a settings gear icon on the right. The table has three columns: FULL NAME, EMAIL ADDRESS, and COMPANY. The data rows are as follows:

FULL NAME	EMAIL ADDRESS	COMPANY
John		Kitten Construction - PennBid QA Account
Cheryl		Kitten Construction - PennBid QA Account
Freddy		Kitten Construction - PennBid QA Account
Gabrielle		Kitten Construction - PennBid QA Account
Dave	1	Tinker Creek

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.

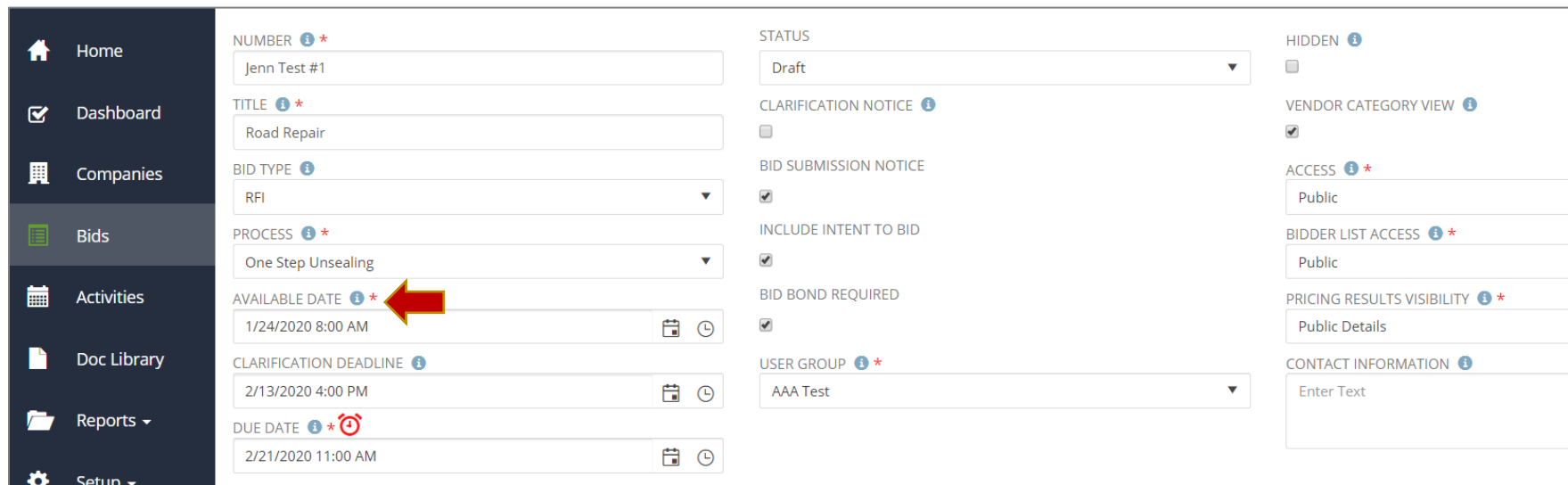
The screenshot shows the same sidebar as the previous image. The main content area displays a "BID ACTIVITY" section with several filter options, each with a checkbox and an icon: None, Downloaded Document, Clarification Request, Submitted Bid, System Unsubmit, Vendor Unsubmit, Bid Withdrawn, Registered, and Attended. At the bottom of the main content area, a green confirmation banner reads: "The notification has been sent." A red arrow points to this message. A close button (X) is visible in the top right corner of the banner.


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.



<ul style="list-style-type: none">HomeDashboardCompaniesBidsActivitiesDoc LibraryReportsSetup	NUMBER <i>i *</i> Jenn Test #1	STATUS Draft	HIDDEN <i>i</i> <input type="checkbox"/>
	TITLE <i>i *</i> Road Repair	CLARIFICATION NOTICE <i>i</i> <input type="checkbox"/>	VENDOR CATEGORY VIEW <i>i</i> <input checked="" type="checkbox"/>
	BID TYPE <i>i</i> RFI	BID SUBMISSION NOTICE <input checked="" type="checkbox"/>	ACCESS <i>i *</i> Public
	PROCESS <i>i *</i> One Step Unsealing	INCLUDE INTENT TO BID <input checked="" type="checkbox"/>	BIDDER LIST ACCESS <i>i *</i> Public
	AVAILABLE DATE <i>i *</i> 1/24/2020 8:00 AM	BID BOND REQUIRED <input checked="" type="checkbox"/>	PRICING RESULTS VISIBILITY <i>i *</i> Public Details
	CLARIFICATION DEADLINE <i>i</i> 2/13/2020 4:00 PM	USER GROUP <i>i *</i> AAA Test	CONTACT INFORMATION <i>i</i> Enter Text
	DUE DATE <i>i *</i>  2/21/2020 11:00 AM		

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