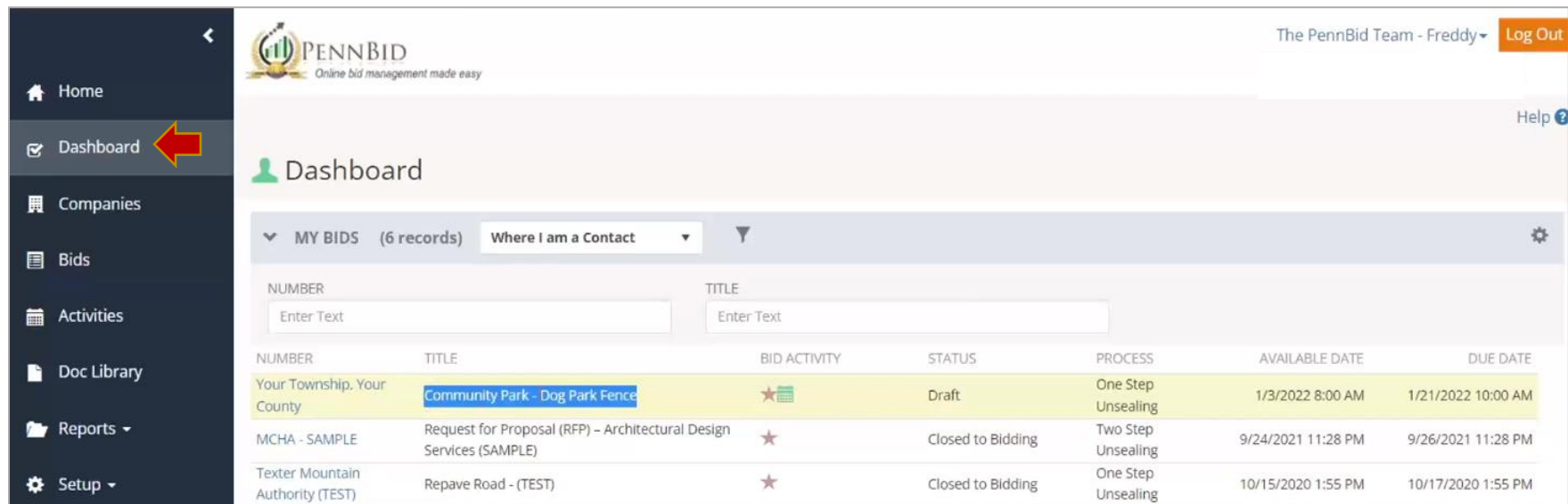# NEW PROJECT REVIEW

New Project Review – Process of reviewing your project for accuracy, adding documents, and finalizing details so that the project is ready to "go live" in the system.

Finding Your Project

To begin, log in to PennBid and click DASHBOARD on the left-side toolbar. Since you are a contact listed on this project, the new project will appear under "My Bids."

Click on the blue hyperlink under "Number" to go into the project.

Reviewing Your Project – Getting Started

Inside the project, you will review the information populated on the SETTINGS tab, BID FORM- QUESTIONS (RFI) tab, and BID FORM- PRICING tab, as well as upload project documents under the DOCUMENTS tab and finalize the date/time for the project to go live.

Note: As a reminder, PennBid does not actually manage your project or create content for you. Our team is happy to assist with the mechanics of how to use the system and we are available to answer questions, but it is up to you to manage all aspects of your project.

Reviewing Your Project – Settings Tab

The SETTINGS tab captures all the information from your advertisement, including project dates, contact information, geographical area, scope of work and any bid events. Be sure to scroll down the page to make sure the populated fields are accurate, except for the "Available Date," which will be edited later after review.

Reviewing Your Project – Bid Form- Questions (RFI) Tab

Once the SETTINGS tab has been checked, move one tab to the right and click on BID FORM- QUESTIONS (RFI).

This screen contains information from your bid form. The bidder acknowledgements and document upload spots (for bidders at bid submission) have been populated and are now fillable fields for the bidders. Review for accuracy.

Reviewing Your Project – Bid Form- Pricing Tab

After reviewing the bidder acknowledgements / RFIs, click the BID FORM- PRICING tab to review the remaining elements (line items) of your bid form.

Scroll down the page until you see the "Pricing Line Items" section. All the line items which you are requesting pricing will be populated. Review each line item for accuracy. If you need to make an adjustment, click the "pencil" icon on the line item you wish to change.

A new window will pop up containing the details of the line item. Any of the information can be edited. Make sure to click "Save" after edits have been populated. New changes will update in the system immediately, so you can again review for accuracy.

Reviewing Your Project – Documents Tab

After reviewing all elements of the bid form, click on the DOCUMENTS tab. This is where you will upload all final versions of project documents that you want available to bidders. This includes, but is not limited to, the advertisement, plans, specs, instructions to bidders, blank required documents for bidders to fill out, etc.

Note: We recommend uploading regular documents in PDF format, as these can't be altered in any way.

Click on the "External Documents – Protected" folder. Clicking the "+" button will create a sub-folder. You can have as many folders and sub-folder as desired. If you prefer, all project documents can be uploaded into the "External Documents – Protected" folder.
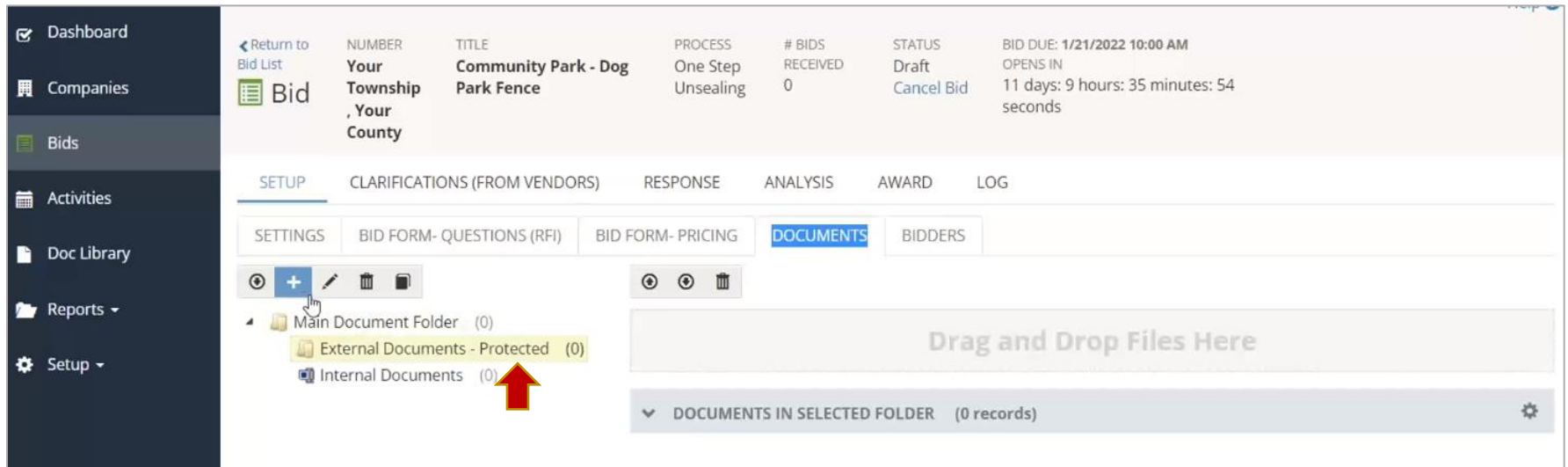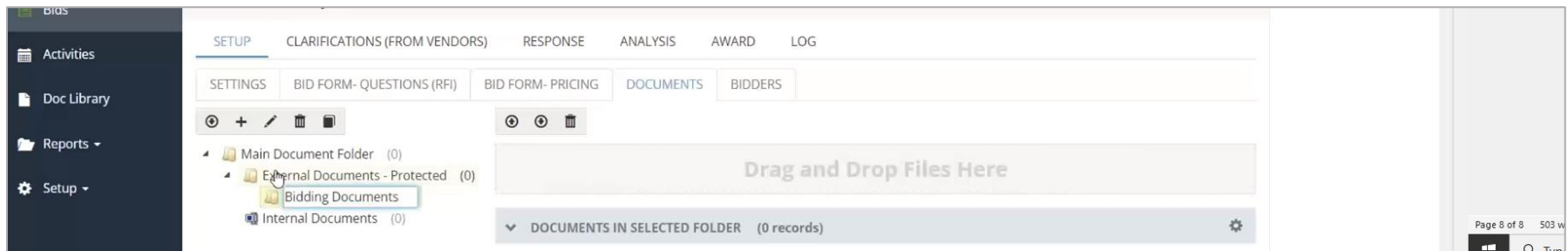

Note: Even if you upload all project documents into one folder, we recommend creating a sub-folder for any addenda issued. This can be created later should an addendum be issued.

Once you finish creating folders, you're ready to upload documents. Simply click on the folder you wish to populate, and then drag your files straight into the "Drag and Drop Files Here" box.

The system will upload your document(s), which will populate under the "Documents in Selected Folder" tab.

Getting Ready to Go Live

Now that the project information has been reviewed and documents have been populated, the final step is adjusting the available date/time that the project becomes visible to potential bidders.

To make that change, click the SETTINGS tab and you'll see the "Available Date" on the left-hand column.

Note: We recommend setting the available date to the day before your advertisement runs in the paper. That way, if bidders see the project ad early in the morning, the project will already be available in the system.

To make changes to the available date, click on the "Edit" button on the top right. All fields will become editable, and you can select the date/time preferred. Be sure to click "Save" after making changes.

At the selected available date/time, the system will release the project automatically. There are no additional steps or actions needed on your part to make the project visible to potential bidders.

Additional Resources

There are several resources and training materials available to assist with creating, managing, and opening bids. We offer video tutorials as well as printable, quick start guides with screen shots. These resources can be found under the "Doc Library" tab. If you cannot find what you're looking for, please reach out to us at info@pennbid.net.