

Transitioning from Paper to PennBid™

Moving from paper based procurement and bidding to PennBid and electronic bid management requires a few modifications. This short document summarizes these changes and the PennBid's User's Guide provides additional details – Link to PennBid User's Guide - [User's Guide](#)

Vendor's View

Let's start from the vendor's view. When logged in, Bidders have a maximum of five clickable buttons. Two of the five are "**Documents**" and "**Bid**".

The "**Bid**" tab - All information that the bidders supply are from this one tab. By clicking, the bidder provides;

- Quote - either lump sum or pricing for each line item. PennBid automatically calculates line extensions and totals.
- Answer any questions, such as vendor qualifications.
- Attach any required original form documents such as bid bond, non-collusion affidavit, equipment list, etc.

The vendors can find all forms within the "**Documents**" section and can attach either a single scanned document or a zipped folder containing many individual files.

Setting Up Your Solicitation

Document display

Documents can be displayed and presented to vendors in many different ways. PennBid uses default folders titled Addenda, Instruction-To-Bidders, Plans, and Specifications. Folder titles can be changes and sub-folders can be added to best suit your needs.

Okay, now on to modifying existing documents

Public Notice (Invitation to Bid)

Very often, there is significant financial savings by modifying the Public Notice. The template available on PennBid's website is often used to greatly reduce the amount of text (and cost). Keep in mind, when potential bidders click on your solicitation, they are greeted with details such as the project description, details about security, and prebid meetings. You can include up to 4000 characters in this first screen.

Public Notice link - [Public Advertisement - Where the savings begins](#)

Obtaining Documents

All Bid Documents, from specification and plans to addenda and Q&A are always available to bidders via PennBid.

Suggested language – All Bid Documents are always available at no cost to vendors via PennBid by clicking on the "Documents" tab.



Submitting and Withdrawing Bids

If you are using the electronic bids feature (clickable), all sealed bids are submitted online via PennBid.

Suggested language – Sealed bids are to be submitted online via PennBid. Bidders can submit, update, and withdraw bids until the date and time described in the Public Notice.

Instructions To Bidders

The Instructions To Bidders section should provide specifics about additional documents the bidders need to include with their electronic sealed bids. On PennBid's Resources page, www.pennbid.net/resources.php, there are several templates available. These documents can be modified to meet the needs of your solicitation.

- [Instructions to Bidders - Request for Proposal](#)
- [Instructions to Bidders - RFQ requesting only bid bond](#)
- [Instructions to Bidders - RFQ requesting multiple documents](#)

Very often the Instructions to Bidders section of posting agency documents refer directly to the document above as an Attachment.

Suggested Language – Attachment A, Instructions-To-Bidders, provides all details about what bidders should provide and how to submit their electronic sealed bid.

Bid Form

Using PennBid to receive electronic bids eliminates the need to include a paper form as part of the Bid Documents. Line item bid form can be uploaded directly to PennBid and can include a number of fields. At a minimum, each line item must have a Number, Description, Unit of Measure, and Quantity.

Link to Line Item Form - [Line Item Bid Form](#)

Often, Bid Forms contain statement or questions that bidders must acknowledge and agree. There is two ways to handle this.

1. Include Bid Form questions in an electronic form that bidders answer directly on their screens.
2. Have Bidders attach their responses as a document.

Regardless of option, bidder's responses are included when they click "Submit Bid"



Knowing which documents the vendors must provide with their bids is an important first step in setting up your solicitation on PennBid.

To help reduce the vendor's costs, it is encouraged to minimize the information that all bidders must provide with bid. Most PennBid users request only one or two documents to be submitted with bid then request additional information from the low two or three bidders following bid opening.

Document Name	Document Number	Provide with Bid	Provide upon request
Form of Guaranty / Bid Bond			
Non-collusion affidavit			
List of Equipment			
List of Subcontractors			
Vendor / Experience questionnaire			