User's Guide

Managing Your Bids and Solicitations

PENNBID

PennBid™ provides many options to manage your bids and solicitations. Each solicitation can be set-up independently to best meet the needs of your agency and the particular solicitation.

Preparing your solicitation

Posting an entire solicitation with all documents, plans, and bid forms is a very easy and quick process, normally taking less than 15 minutes. A little preparation will help make the process very smooth.

Tab		
Set-up	Agency name, Project title, bid due date, brief description	
Events	Pre-bid Meeting	
Documents	▪ Naming electronic folders ▪ Know the location of documents on your computer or server	
Questions	Enable questions Set question cutoff date	
Bidders	Public or Private (By invitation only)	
Bids	▪ Written questions bidders must answer ▪ Bid type (Document, lump sum, line item)	

When ready to post your solicitation, don’t forget;

Display to vendors	During the set-up of your solicitation, no information is displayed to vendors. When ready, make sure to click “Display” (located on any page).	
Online Bidding	Online bidding is an option with **PennBid**™. To enable, click on Solicitations > Bids > Enable online bid	
Sealed Bids	During the initial set-up of your solicitations, bids are not sealed. When ready, make sure to click “Seal this bid” (Solicitations > Bids > Seal this bid)	

Now, let’s get started.

Login/Password

The Login button is in the upper right. Use the same button to Logout when your online session is complete.

You will be automatically logged out if you do not perform any actions within a period of 60 minutes. Simply login again to use the website.

If you have forgotten your password, enter your email address into the Forgot Password section and click the Reset Password button. You will receive an email message with a hyperlink that you must click to reset your password.
When you receive the Forgot Password email message:

- Click on the Set New Password link in the message.
- Enter and confirm your new password on the form provided.
- Click the Change Password button.

If you have forgotten your password, you must contact the PennBid System Administrator to reset the password.
If you have forgotten the email address you used to register, you must contact the PennBid System Administrator to look up that information.

Solicitations

Solicitations > List
The Solicitation List is a tabular view of all bid opportunities.
You can filter the list by:

- An internal Point of Contact for Solicitations.
- The Solicitation Status (Open, Closed, Cancelled, Pending Award, Awarded).

Sort the list by clicking on any column heading.
To Delete a Solicitation:

- Click on the Delete link.
- Click OK in the pop-up dialog box to confirm that want to Delete the Solicitation and all related information from the database.

Note: You should typically only Delete a Solicitation if you made a mistake during initial data entry. Deleting a Solicitation will remove all related records (i.e. Bidders Lists, Bids, Document Orders, etc.). There are System settings that will automatically hide a Solicitation after a set number of days. In addition, you can choose the Do Not Display setting on the Solicitation > Setup page if you want to remove the Solicitation from the list viewable by your Vendors.

To View details of the Solicitation, click on the View link.

Solicitation Status
A Solicitation progresses through the following phases:

- Open Prior to the Bids Due Date/Time
- Closed After the Bids Due Date/Time
- Pending Award After Bid Results have been entered

- Awarded Contract has been Awarded to one or more Vendors

To Cancel a Solicitation, check the Cancel box on the Solicitation > Setup screen. This simply sets a flag on the display of the Solicitation.

Solicitation Alerts
Alerts are displayed near the top of the page to provide feedback on issues that may require your attention. Depending on the features that are enabled, these may include:

- Undeliverable messages.
- Unanswered questions.
- Unfilled document orders.

Editing a Solicitation

To Edit a Solicitation:

- Click on the Solicitations tab.
- Click on the View link for the Solicitation.
- Edit the required and optional fields.
- Click Update to save your entries.

Deleting a Solicitation

- Click on the Solicitations tab.
- Click on the Delete link for the Solicitation.
- Click OK on the Dialog box warning that you are about to Delete a Solicitation.

Warning: If you Delete a Solicitation, you will delete all historical information about the Solicitation. You should only Delete a Solicitation if you have made a mistake in the initial Setup process and before it has been displayed to your Vendors. Solicitations will automatically be hidden after the number of days specified in the Rules that are established for the PennBid site.

Adding a Solicitation

Solicitations > Setup

To Add a Solicitation:

- Click on the Solicitations tab.
- Click on the Add link.
- Fill out required and optional fields. This Page is important as this information will be publically seen by potential bidders.
    - In the Number field, provide the name of your agency (ie. Billings Township)
    - Name the solicitation
    - Input bid due date and time along with a brief description. Remember, this is the description that will be publically visible.
- Click Insert to save your entries.

Next, you can access the additional links on the Solicitations tab to set up other attributes of the Solicitation.

When you first Setup a Solicitation, it is not displayed to Vendors to allow you the opportunity to enable other optional features and to preview the Solicitation.
Important - To Display the Solicitation to Vendors, click on the Display link in the Visible to Vendors field at the top of the page.

Events

Solicitations > Events (optional)
The optional Events feature allows you to schedule one or more Events, such as a Pre-Bid meeting, that will be displayed to Vendors.
If enabled, an Events link will appear under the Solicitations tab after you have selected a Solicitation to View.

Adding an Event
To Add an Event:

- Click on the Solicitations tab.
- Click on the View link for the Solicitation.
- Click on the Events link.
- Click on the Add Event button.
- Fill out required and optional fields.
- Click Insert to save your entries.

Editing a Event
To Edit an Event:

- Click on the Solicitations tab.
- Click on the View link for the Solicitation.
- Click on the Events link.
- Click on the View link for the Event.
- Edit the required and optional fields.
- Click Update to save your entries.

Deleting a Event

- Click on the Solicitations tab.
- Click on the View link for the Solicitation.
- Click on the Events link.
- Click on the Delete link for the Event.
- Click OK on the Dialog box warning that you are about to Delete an Event.

Event Documents
You can attach a document to an Event such as an announcement or agenda. Use the Browse button in the Event Documents section to highlight the file on your local computer or network, and click Upload to post the document on the website on the Events page.

Event Registration
The optional Event Registration function allows Vendors to register to attend an event and to track attendance at an Event. When enabled, Vendors can simply click a Register link on the Events page. A list of registrants will be displayed in the Event Registration section.

To enable Event Registration:

- Check the Enable Event Registration box in the Event Setup Section.
- Specify a cutoff date and time for registration (the feature allowing online Vendor registration will be disabled after the date and time specified)

Categories

Solicitations > Categories (optional)
If the Categories feature is enabled, a Categories link will appear under the Solicitations tab after you have selected a specific Solicitation to View.
Categories are used to define the products and services that are associated with the Solicitation. These Categories are used in matching Vendors that provide relevant products and services.

Adding Categories

- Click on the Solicitations tab.
- Click on the View link for the Solicitation.
- Click on the Categories link.
- Click on the Edit button.
- Click on the top-level Category that appears to have product and/or service listings applicable to your company.
- Check the boxes for the applicable Subcategories.
- Repeat the process for all relevant Subcategories.
- Click the Save Selected button at the top or bottom of the screen to save your changes.

Deleting Categories

- Click on the Solicitations tab.
- Click on the View link for the Solicitation.
- Click on the Categories link.
- Your previous selections will be listed.
- Click on the Edit button.

Your previous selections will be checked and the Category/Subcategory descriptions will be shown in boldface type.

To Add a Category, check the box of the applicable Subcategory, and hit the Save Selected button.
To Delete a Category, uncheck the box of the applicable Subcategory, and hit the Save Selected button.

Displaying Categories
Check this box if you want to display the Categories to Vendors on the Solicitation > Description page.

Documents

Solicitations > Documents (optional)
Click on the Solicitations tab
Click on the View link for the Solicitation
Click on the Documents link

Managing Document Folders
Documents are presented in a hierarchical, expandable “treeview” of document folders and hyperlinks. You can expand or collapse the folders by clicking on the + or – symbol adjacent to a document folder. The default Document tree is setup at the time of website launch. Folders that do not contain document files will not be displayed to Vendors.
To work with a Document Folder, first click on the Folder in the treeview.

Planning your documents
Prior to actually setting up your solicitation within **PennBid**™, taking time to plan out what information will be provided to the bidders, along with how this information will be presented is well worth the investment.

The **Documents** section is where your bidders find every aspect of the solicitation, from specifications and plans, to vendor pre-qualifications and requirements. You can setup document folders any way you want. Electronic folders can be added, removed, named and re-named to best fit your needs. Some agencies prefer to upload a single document containing the entire bid package, others prefer to break the bid package into different folders or sections.

Suggestions for folders:

- Specifications
- General Specifications
- Specific Specifications
- Must be returned with bid
- Qualifications / Pre-qualifications
- Addenda
- Plans
  - Electrical
  - Mechanical
  - Site Prep

Add a Document Subfolder

- Click the Add link.
- Enter a Subfolder name.
- Click the Save button.

Rename a Document Folder

- Click the Rename link.
- Enter a new Folder name.
- Click the Save button.

Delete a Document Folder

- Click the Delete link.

Uploading Documents

PennBid™ uses an ActiveX Control to facilitate uploading multiple documents in one step. The first time you attempt to Upload a document, you will be prompted to download this ActiveX Control. You must disable your pop-up blocker to download this control.

To Upload a document into a specific Folder, first click on the Folder in the treeview.

- Click the Upload link
- Click the Add Files button
- An Add File dialog box will open
- Navigate to the Folder on your computer or network that contains the documents you wish to upload
- Select a single document by highlighting the document with your cursor, or
- Select a group of adjacent files by holding down the Shift Key and highlighting the first and last document in the group, or
- Select multiple separated documents by holding down the Ctrl Key and highlighting individual documents, then
- Click the Add button in the Dialog Box
- The Dialog Box will close and your files will be shown in the Add Files window on the Documents page
- Click the Upload button
- A Progress Window will appear and the page will refresh when the upload is complete
- Your filenames will now appear under the Folder you selected.

Viewing Documents

Clicking on the document filename hyperlink will open the document using the viewing application that is associated with this document type on your computer, such as Adobe Acrobat.

Clicking on a file with the .TIF and .DWF extension will prompt you to download the free Brava Viewers that are available for each drawing type. This is a free viewer that is especially useful for viewing and doing takeoffs from drawings. After you download and install the Brava Viewer, each time you click on document link with these extensions, it will automatically be displayed in a new Brava Viewer window.

Deleting Documents

- Check the box next to the filename of the document.
- Click the Delete Selected button.

Questions

Solicitations > Questions (optional)

The Questions feature allows vendors to ask questions about a Solicitation and view Answers posted by you.

If the Questions feature has been enabled, you will see a Questions link on the Solicitations tab.

To access the Solicitations > Questions page if this feature has been enabled:

- Click on the Solicitations tab
- Click on the View link for the Solicitation
- Click on the Questions link

Question Options

To enable the Questions feature:

- Click the Edit button.
- Select Enable Questions = Yes.
- Enter a Question Cutoff Date.
- Click Insert (or Update if Editing a previous entry) to save your entries.

After the Question cutoff date, the Ask Question button available to Vendors is automatically disabled but they will be able to view posted Questions and Answers.

Viewing Questions

By default the View of Questions will be set to Open. Open Questions are those that have not been Answered. You can change the View to include Closed Questions by checking the Closed Box in the Select View box and click Apply.

Answering a Question

Open Questions will be listed in Questions table. To Answer a Question:

- Click the Edit button for that Question
- Enter your Answer in the text box
- Check the All View box if you want all Vendors to view the Question and Answer
- Select the Email Answer option:
  - None
  - Company – Emails the Question and Answer to the Company that asked the Question.
  - All Bidders - Emails the Question and Answer to all Companies on the Bidders List.
- Click the Update link to save your entries.

Adding a Question

If you receive a Vendor Question by telephone, fax, or email, you can add the Question to the system and respond online.

At the bottom of the Questions table is an Insert row for new Questions.

- Select a Bidder from the flipdown box in the Bidder column. If the Vendor is not already on the Bidders List, you must first add them to the Bidders List before you can select them here.
- Follow the steps for Answering a Question listed above.

Bidders

Solicitations > Bidders

Key functions accessed from the Bidders list page:

- Adding and deleting Vendors to a Bidders List.
- Viewing website activity by Vendors.
- Sending notifications to Vendors by email and fax.

The Bidders List may be displayed on multiple pages because of the amount of data that may be returned based on the view you have selected. You can adjust the number of Records per Page using the flipdown box in the header row of the table.

Bidders List Options

The following options may be enabled.

Invitation Type:

- Public - Solicitation will appear to website visitors who have not logged in.
- Non-logged in visitors can view information about the Solicitation but must log in to initiate transactions (download document, ask question, declare intent to bid, bid online, etc.)

Private, Invite by Company

Only invited Vendors that are put on the Bidders List will be able to view the Solicitation after they log in.

Invited Vendors are limited to submitting an Intent to Bid or Online Bid in specific Categories of work.

Display Bidders List to Vendor

Checking this box will enable public posting of the bidders list. A Bidders link will be present on the Solicitations tab viewable by Vendors. The Bidders list visible to Vendors displays the Company address and specific points of contact for Companies that are on the Bidders List. If enabled, the Bidders List will also display the Project Role of the bidder, such as Prime Contractor, Subcontractor, Supplier, or Other.

Enable Vendor Role Selection

Checking this box will require that Vendors identify their Project Role (Prime Contractor, Subcontractor, Supplier, or Other) before downloading documents or initiating other website transactions. The Vendor Role can also be edited by a User.

Enable Vendor Intent To Bid

The Intent feature (short for Intent to Bid) allows Vendors to submit a Will Bid or No Bid response as an early indication of their intent to submit a bid or proposal in response to a Solicitation. If the Intent feature has been enabled, Vendors will see an Intent link on the Solicitations tab. The Intent response for a Vendor can also be edited by a User.

Adding Vendors to the Bidders List

The Add Selected button will add all rows in the table that you have specifically checked. The Add All button will add all results of your search (including results on pages not shown – the number of additional pages is shown at the bottom of the table of results)

From the Bidders List, click the Add Vendor button to begin adding Vendors. You have three ways to add Vendors to your Bidders List.

- Search by Company or Contact
  - To search for a specific Company or Contact, enter your search term. You can display the results by Company or by individual Contacts. You can then Add Selected or Add All Companies or Contacts from your results list.
- Saved Vendor List
  - Select a Saved Vendor List from the flipdown box. You can display the results by Company or by individual Contacts. You can then Add Selected or Add All Companies or Contacts from your results list.
- Advanced Search
  - You can filter the Vendor database using the selections on the Advanced Search screen. You can display the results by Company or by individual Contacts. You can then Add Selected or Add All Companies or Contacts from your results list.

Viewing the Bidders List

Several options are available for customizing the view of the Bidders List. The default view is a single row for each company.

- Category - Choices in the flipdown box reflect the Solicitation Categories.
- Company View - Displays one Company per row
- Category View – Displays each Company-Category combination per row
- Show Contact Data – Shows address, telephone, fax, and email data

Clicking the Company name hyperlink will open a new browser window with an editable view of the Company profile.

Bidders List Column Abbreviations:

Categories – shows which Solicitation Categories match Vendor Categories.

D – Download: checkmark indicates a document has been downloaded by one or more Company Contacts.

O – Order: checkmark indicates a document Order has been placed by one or more Company Contacts.

Q – Question: checkmark indicates a Question has been asked by one or more Company Contacts.

B – Bid: checkmark indicates a Bid has been submitted by the Company.

Editing the Bidders List

Editing a row in the Bidders List

- Click on the Edit link in the row for the record you wish to edit.
- The row will expand and you can Edit data in available fields.
- Click the Update link in this row to save your changes.

Deleting a row in the Bidders List

To Delete a row from the Bidders list, check the row.

- Click the Remove Selected button at the top of the Bidders List.
- Depending on the Invitation Type and the Bidders List view that you have selected, you will only be able to Edit certain records.
- For a Public or Private, Invite by Company Solicitation, records can only be edited in the Company view.

- For Private, Invite by Category Solicitations, records can only be edited in the Category view.

Notifications (General messages, addenda, etc)
Selecting Recipients: From the Bidders List you can send broadcast Notifications to selected Bidders.

- Select the Company or Category View.
- Select the Companies you wish to Notify and click the Notify Selected button; or
- Click the Notify All button.
- The Notify Selected button will accept all rows in the table that you have specifically checked. The Notify All button will add all results of your search (including results on
- pages not shown – the number of additional pages is shown at the bottom of the table of results)

The Notify by Category button will compile a list of all Vendors that match the Solicitation Categories, regardless of what Companies and Contacts are on the Bidders List. This function is intended to be used when you do not need control access to Solicitation information but you wish to invite as many Vendors as possible to view the bid opportunity. For a Public Bid, you need not create a specific Bidders List at the time the Bid is posted. Using the Notify by Category will automatically send a message to all Vendors with matching Solicitation Categories.

See the Help section Solicitations > Notifications for information on creating and sending your message.

See the Help section Solicitations > Log for information on tracking the delivery of your messages.

Bids

Solicitations > Bids (optional)
The Bids feature provides the following capabilities:

- Manual user entry of vendor bids and award information.
- Online bidding by vendors, including submittal of prices and documents.
- Entry of responses to bid questions by vendors.
- Analysis of bid information.
- Display of bid results and award information to vendors.

Bid Form
The Options section on the Bid Form tab allows you to set up optional bidding functions:

Enable Online Bid
Checking this box will allow Vendors to submit bids online up to the Bids Due Date/Time.

Bid Type

- RFI – Questions vendors must answer either as a Quick Quote or full sealed bid.
- Document – No pricing information is requested but Vendors can upload a bid document (proposal).
- Lump Sum – Provides a single entry field for a Lump Sum price.
- Line Items – Allows you to create a multiple line item Bid Form including Base and Alternate (Add / Deduct) items -see details on next page.

Sealed Bid
Checking the Sealed Bid box prevents Users from viewing bids entered by Vendors before the Bids Due Date/Time. Once you save the Sealed Bid option, PennBid does not allow you to edit the Options. Additionally, you will be unable to move the Bids Due Date/Time to an earlier value to prevent unauthorized viewing of Sealed Bids.

Note – PA Procurement Code for Local Government Units requires that bids remained sealed until Bid Opening.

Line Item Bid Form
If you selected Enable Online Bid, Vendors will be able to enter their prices directly into an Item Bid field on the website.

If you select Bid Type = Line Items, you will see a Bid Form Template at the bottom of the Bid Form tab.

Creating a multiple line item Bid Form:

- Click on the Template Bid Form (.csv file) link and download this file to your local computer (typically this file will open in Microsoft Excel).
- Enter values into each cell and **Save the file in the .csv format**.
- On the Upload New Bid Form field, click the Browse button to open the Choose File dialog box.
- Highlight your Bid Form .csv file and hit the Open button.
- Click the Upload button.

The system will Upload a copy of your bid form, refresh the web page, and display your bid form.

Following is a list of the fields on the Bid Form:

Bid Form Column	Required or Option	Comment
Number	Required	Each line item must have a unique number
Lot	Optional	Group items for analysis or separating alternate bids
Description	Required	Free form text for item identification
Subcategory	Required if Invitation by Category	Subcategory numbers must match solicitation categories: vendors can only bid specific items
Internal Ref Number	Optional	Internal stock or part number, can also be used to separate alternate bids
External Ref Number	Optional	Manufacturers stock or part number
Unit of Measure	Required	Units for bid quantities
Quantity	Required	Number of units
Extended Baseline Price	Optional	Expected bid (quantity x unit price) based on historical values. Not viewable by Vendors. Used in bid analysis statistics.
Baseline Source	Optional	Source of historical values. Not viewable by Vendors
Type	Optional	To make a line item an alternate ADD or alternate DEDUCT, place an “A” or “D” in this field. All other line items are assumed to be Base Bid.

Clicking the Clear Bid Form button will delete the current Bid Form and delete all existing bid information.

Uploading a new Bid Form will also replace the current Bid Form and delete all existing bid information.

Bid Questions – The RFI Tab

You can request that Vendors answer specific questions referred to as RFI.

RFIs for ***Quick Quotes*** - If a PennBid user is interested in just a quick quote or information from vendors, RFIs can be can be used without a “bid” form.

RFI can also be used in conjunction with a lump sum or line item bid form to ask vendors questions.

There are two ways to create RFI questions:

1. Direct entry
   - Enter a Question Number
   - Enter the Question
   - Click Insert
   - Use the Edit or Delete links to modify the Question.
2. Saving as a file and uploading. (beneficial if you ask the same or similar questions on multiple solicitations.
   - Click on the RFI Template Form (.csv file) link and download this file to your local computer (typically this file will open in Microsoft Excel).
   - Enter information into each cell and **Save the file in the .csv format**.
   - On the Upload New Bid Form field, click the Browse button to open the Choose File dialog box.
   - Highlight your RFI file you just created or one previously saved and hit the Open button.
   - Click the Upload button.

If you Edit the RFI questions after Vendors have submitted responses, you should notify your Vendors of this change. Deleting a Question will also Delete any Vendor Responses that have been submitted. You should typically only use the Edit and Delete functions before you make the Solicitation available to your Vendors.

Opening and Displaying Bids

Bid Opening – Starts with the Bids Tab

Review of submitted bids, documents, and responses to questions starts by clicking "Bids" from the main control bar at the top of the page. When clicked, secondary tabs appear that allows review of all aspects of the submitted bid along with displaying bid results.

Reminder – all screens can by printed directly or downloaded to Excel by clicking the icons in the center of each screen.

Summary of Base Bids and Review of Submitted Documents

By clicking the secondary Bids tab, the view displayed is a summary showing all Vendors on the Bidders list, including the Total Base Bid, Bid Date/Time, link to a bid document if submitted, and any Comments. Information may be sorted by clicking on the individual heading title that is underlined.

Important Note - PennBid is configured so that only the bidder can edit or modify his/her bid information. Once the bid due date and time has past, data cannot be changed or modified by anyone.

Review Submitted Documents

From the summary screen, the file or folder submitted by each bidder can be reviewed as listed under the Bid Document column.

Review of questions / answers submitted by Bidders

All answers to questions asked on the solicitation can be viewed by clicking the RFI tab.

Bid Tabulation - Analysis

Information accessible on the Analysis Tab provides detailed tabulation of Line Item Bids.

- **All Line Items**
  - Provides bidders Unit and Extended pricing for each line item.
- **Cross-Tabulation by Vendor**
  - Provides extended price comparison for each line item by each bidder.

You can download any of these tables by clicking on the Microsoft Excel icon in the top row of the table.

Display Results

The Display feature allows you post Bid and Contract Award Results that can be viewed by Vendors.

Note – the system default is set to NOT display results. Users must select if and how they want results displayed.

Click EDIT to modify Display settings and Update to save changes

Display Settings

- Bid and Award Data – Displays the names of bidders along with a summary of their base bid amount
- Award Data Only – same as above but displays only award info.
- Bid and Award – Company Name Only – Displays only names of bidders without bid or award amounts.
- Award – Company Name Only – Displays only the name of awarded bidder.

- Bid/Award Total – Displays a Lump Sum or the total of all Line Items in the Bid or Award column for a Vendor.

Displaying User Comments

PennBid User's may display comments along with bid results. A typical comment is;
"This is for information only and does not constitute an intent or issuance of award"

To display comments – Check the box next to Display Award Grid Comment and add comment within Bid and Award Comments box.

Log

Solicitations > Log
The Log page provides a historical record of outbound email and fax messages that are initiated from the Bidders page and document downloads by Vendors for a specific Solicitation.

Message Summary
The Message Summary Tab presents a tabular summary of each message batch that is initiated from the Bidders>Notification functions. The # Sent and # Failed messages are displayed on this table. Clicking on the Message Subject link will provide a view of individual messages that were sent in that batch.

Message Detail
The Message Detail page shows a list of individual messages to Vendors. All messages that were successfully processed by the mail server will be indicated as Sent in the Delivery Status Column. If an email or fax message fails because it is rejected by the receiving mail server or fax machine, the failure reason will be displayed in the Failure Reason column.
If you requested Receipt Acknowledgement when you sent the message, the word Requested will appear in the Acknowledgement column. If the recipient has clicked on the Receipt Acknowledgement link in the email message they received, the date and time that they clicked on that link will be displayed in the Acknowledgement column.

Resending a Message
From the Message Detail page, you can resend a message to the listed recipients:

- Check the recipients that you want to receive a new message.
- Click the Notify Selected button.
- Set the message options, subject, comments and documents attachment
- Preview the message and Send Notification.
- Start by clicking the Notify All button if you want to send a message to all recipients on the list.

Download Detail
The Download Detail page shows the Company, Contact, Filename, and Download Date for documents viewed or downloaded by Vendors.
Note: A Download is recorded when a document hyperlink or Download All or Download Selected button is clicked. It is not possible to record whether the document view or download was successful.