



Document Upload Slots

Having bidders upload support documents as part of their bid submission is necessary on virtually every project. This includes, but is not limited to, a non-collusion affidavit, bid bond or bid surety, questionnaires, employment verification form, etc. Determining how many slots to enable, the description of each slot and whether to make the slot mandatory all depends on the type of project and documents that must be submitted by bidders.

Option 1 – Enabling Document Upload Slots on Public and Private Projects

Every project, whether public or private (by-invitation-only), needs to have document upload slots enabled. To enable document upload slots, click **Bids** on the top blue bar within your project, then click the small “Pricing Form” tab. The Document Upload slots are in the middle of the screen under “Pricing Documents.”

Pricing Documents

i If vendor responses have been submitted, inserting a new document or deleting an existing document will render all vendor responses Incomplete. Deleting a document field will delete associated vendor response documents. Be sure to notify bidders of changes of changes to response documents.

Enable	Required	Label	Delete
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		

Edit

When determining how many slots to enable, it’s best to consider the size of the project and the number of documents required at bid submission. Bidders can upload about 5MB per slot. PennBid recommends enabling a minimum of three slots but encourages four or all five slots be enabled with larger projects or projects that have numerous requested documents.



When bidders are uploading their documents, keep in mind that when slots are “enabled” but not “required,” bidders can upload a single file in one or more slots or they can combine their documents and upload all together. They do not have to include a document in every enabled slot. On the contrary, when a slot is marked as “required,” bidders MUST upload a document in that specific slot. If they do not, from a system perspective, the bid will not be accepted. For this reason, we highly recommend not requiring document upload slots or only requiring the first slot if a bid bond or surety must be included with the bid.

Document upload slots also need a label. PennBid recommends using the first slot for any required documents (“Upload Bid Bond,” or “Upload Bid Surety” or “Upload Required Documents”). The remaining slots can simply say “Upload Support Documents” and the bidders can browse and upload any documents they prepared for the project.

To enable document upload slots and add labels, click “Edit” under “Pricing Documents.” Check the number of slots you want enabled and any slots you are requiring. Then add the label on the right. When finished, click “Update.”

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Enable	Required	Label	Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Upload Required Documents	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Upload Support Document(s)	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Upload Support Document(s)	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Upload Support Document(s)	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>



Note: There are two tabs (Pricing Form and RFI Form) that offer five document upload slots, allowing up to ten document upload slots per project. We recommend using the Pricing Form slots for documents related to the pricing submission on all public/private projects and the RFI Form slots for Proposals, or projects where certain documents need to be available when unsealing the RFI submission separate from pricing, such as in a 2-step selection process.

Note: Bidders can upload documents in several formats, including zip files.

Note: If a bidder uploads a document into a slot with an existing document, the most recent document will overwrite the old document. Only the most recently uploaded document(s) will be submitted.

Option 2 – Enabling Document Upload Slots on RFPs

Some projects do not have a bid form or line items, but rather are a request for proposal. In this case, RFI Documents should be enabled since the project will not have a “Pricing Form” tab. To enable RFI document upload slots, click **Bids** on the top blue bar within your project, then click the small “RFI Form” tab. The document upload slots for RFPs can be found under the RFI Documents section, which is located right below the “RFI Form” tab.

Enable	Required	Label	Delete
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		



The process of enabling RFI documents and adding labels are the same as public and by-invitation-only projects. In this case though, PennBid recommends requiring the first document upload slot and using the label “Upload Proposal Here.” Since the project is specifically designed as a request for proposals, it makes sense that bidders be required to upload the proposal for bid consideration. PennBid also encourages enabling, but not requiring, additional slots for other supporting documents.

Setup | RFI Form | Bids | Award | Display Results

RFI Documents

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Enable	Required	Label	Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Upload Proposal Here	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Upload Support Document(s)	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Upload Support Document(s)	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Upload Support Document(s)	
<input type="checkbox"/>	<input type="checkbox"/>		

If you have any questions regarding document uploads – how to enable document upload slots, how many slots to enable, which slots to require, if any – please contact our office.