



## Setting Up Bid Forms


The **Bids** tab is used to allow the bidders to submit their proposals, bids prices, and support documents securely online.

Before reviewing the mechanics, let's go over a few basics. For most bids, there are three components:

1. The actual Line Items (also known as the Schedule-of-Values) or proposal document
2. Questions or statements that bidders must acknowledge or respond to prior to submitting their bid. We call these "RFIs"
3. Supporting Documents to be submitted with Bid – Bid Bonds, non-collusion affidavits, ect.

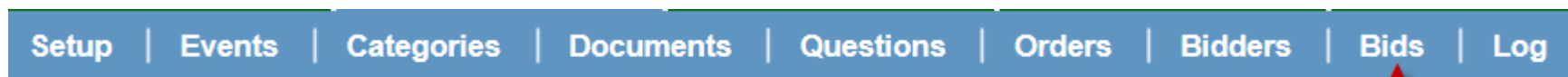
**Types of Bids** – The PennBid Program accepts various types of bids.

- **Documents Only** – These are proposals, mostly used for professional contracts
- **Lump Sum** – Just one price to provide the products or services outlined in the specifications
- **Line Item** – By far the most common. Line item bids present individual items that must be bid on (called Schedule of Values). Bidders provide the unit cost and will automatically calculate the line item extended price and total base bid.

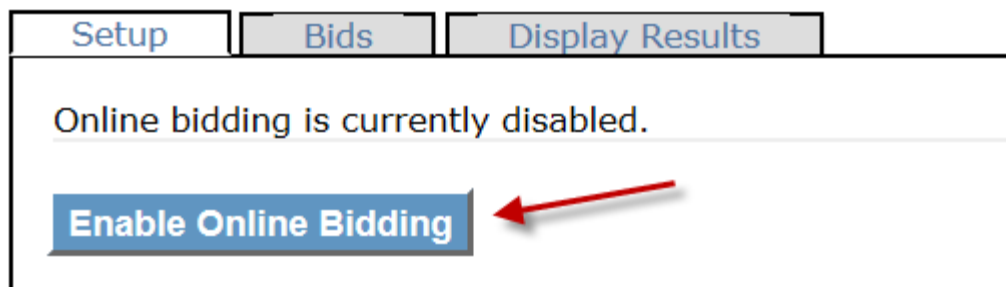
 **Important Note** – From the Bidders perspective, everything associated with submitting their bid – Supporting Documents, line items, and RFIs - are presented on one screen



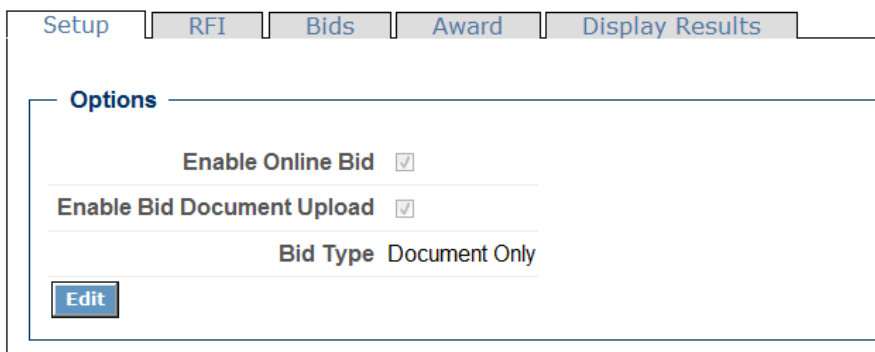
To get started, click **Bids** (top blue bar)



Then **Enable Online Bidding**



By default, the Program is set to "Document Only" (a proposal without online pricing)





To set-up either a **Lump Sum** or **Line Item** Bid, click **Edit**, make your selection, and then **Update**.

Setup | RFI | Bids | Award | Display Results

**Options**

Enable Online Bid

Enable Bid Document Upload

Bid Type

Lump Sum

Line Items

Document Only

RFI Only

Here is view of Line Item Bid set-up.

**Bid Form**

Add Item from Master

Upload New Bid Form   [Template Bid Form \(.csv file\)](#)

Line Item	Lot	User Field 1	User Field 2	User Field 3	Type	Description	Unit of Measure
<a href="#">Insert</a> *	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	* BASE	* <input type="text"/>	* <input type="text"/>

For more extensive bid forms, using the Template is best option. Just populate and save as a .CSV file.

For less extensive bids, line items can be added directly on-screen. When populated, click Insert (left side)




**Using Template Bid Form** – once populated and saved as a CSV file, the bid form can be uploaded by clicking **Browse**, locate the file, and **Upload**.

**Base Bid and ADD / Deduct Alternates** – When setting up line items, the system defaults to all items being part of the overall Base Bid (under **Type**). ADD and Deduct line items can be identified to bidders by either selecting from the **Type** dropdown or including an “A” for ADD or “D” for Deduct within the Type column if using the template.

The screenshot shows a horizontal form bar with several input fields. From left to right: a field with the number '23', a dropdown menu with 'ADD' selected (indicated by a red arrow), a text field containing 'ADD Alternate 1', a field with 'Lump Sum', and a field with the number '1'. Each field is preceded by a red asterisk.

Select from drop Down for Base, ADD Alternate, and Deduct Alternate

 **Important Note** – The Program will automatically sum (add up) all base bid items to eliminate math errors by the bidders. ADD and Deduct Alternates are not included within the base bid but are available (via **Analysis > Bid Tabulation** – available after Bid Closing). See **Managing Your Solicitation** section of User Guide



## RFIs

RFIs are questions or statements that you would like the Bidders to answer or acknowledge. Most Bid Forms contain these types of statements or questions. RFIs can be Inserted (and Deleted) either directly on-screen or by using and uploading the **RFI Import Template**.

Setup | Events | Categories | Documents | Questions | Orders | Bidders | **Bids** | Log

Solicitation Shady Maple Authority - Bids  
Construction of New Dog Box for Maddi  
Bids Due Date/Time: 5/07/2013 10:00:00 AM Eastern

Visible to Vendors: Currently Hidden | Show | Bids Due: 5/07/2013 10:00:00 AM Eastern

Setup | **RFI** | Bids | Analysis | Award | Display Results

RFI Setup

Bid Form RFI export print Records Per Page

Number	Category	RFI
<a href="#">Edit</a> <a href="#">Delete</a> 1	Addenda Acknowledgement	Have you reviewed all posted addenda prior to submitting this Bid?
<a href="#">Edit</a> <a href="#">Delete</a> 2		Are you a registered contractor? If so, please provide State Registration Number

[Insert](#)

[RFI Import Template \(.csv file\)](#)

Upload RFIs

★ **Important Note** – To prevent incomplete bids, Bidders **must** fill out all Bid Form line items and RFIs. If any are left blank, the bid cannot be submitted and the Program will remind Bidders.

★ **Important Note** – For most agencies and engineering firms, the RFIs are common to all bids they solicit. Once the RFI Template file is saved, it can be used on all bids.