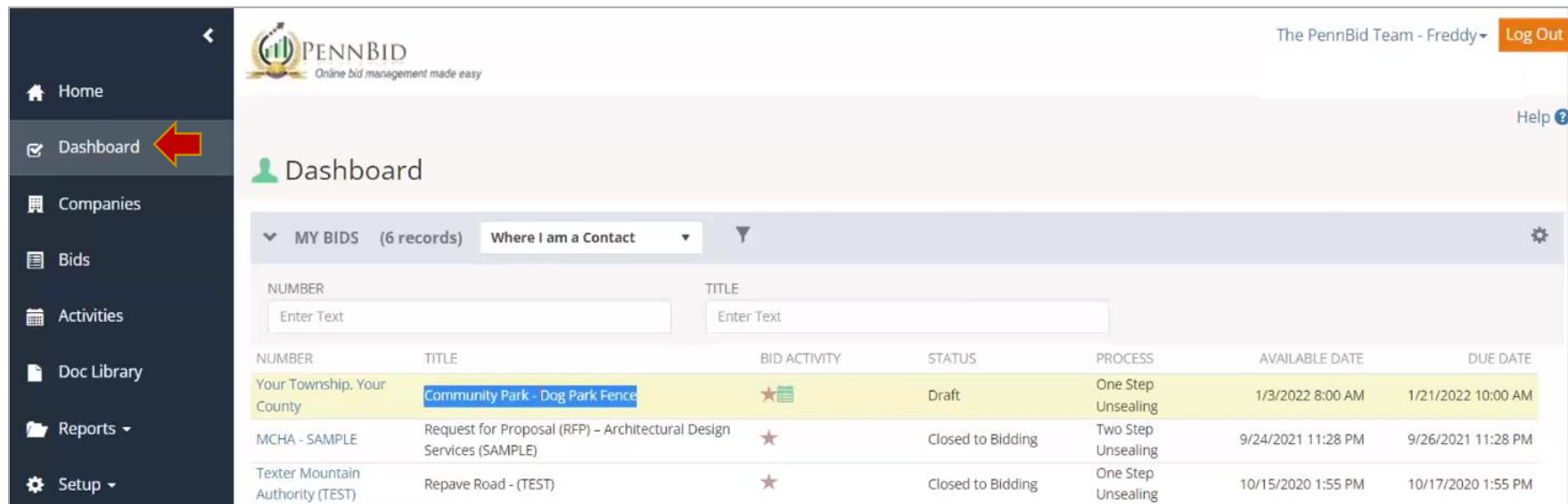


# NEW PROJECT REVIEW

*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.”



The screenshot shows the PennBid dashboard interface. On the left is a dark sidebar with navigation options: Home, Dashboard (highlighted with a red arrow), Companies, Bids, Activities, Doc Library, Reports, and Setup. The main content area shows the user 'The PennBid Team - Freddy' with a 'Log Out' button. Below the user name is a 'Dashboard' heading and a 'MY BIDS (6 records)' section with a filter dropdown set to 'Where I am a Contact'. There are two search input fields for 'NUMBER' and 'TITLE'. Below these is a table of bids:

NUMBER	TITLE	BID ACTIVITY	STATUS	PROCESS	AVAILABLE DATE	DUE DATE
Your Township, Your County	<a href="#">Community Park - Dog Park Fence</a>	★	Draft	One Step Unsealing	1/3/2022 8:00 AM	1/21/2022 10:00 AM
MCHA - SAMPLE	Request for Proposal (RFP) - Architectural Design Services (SAMPLE)	★	Closed to Bidding	Two Step Unsealing	9/24/2021 11:28 PM	9/26/2021 11:28 PM
Texter Mountain Authority (TEST)	Repave Road - (TEST)	★	Closed to Bidding	One Step Unsealing	10/15/2020 1:55 PM	10/17/2020 1:55 PM

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.

The screenshot shows the PennBid web application interface. On the left is a dark sidebar with navigation options: Home, Dashboard, Companies, Bids, Activities, Doc Library, Reports, and Setup. The main content area features the PennBid logo and a user profile 'The PennBid Team - Freddy' with a 'Log Out' button. Below this is a table of bid items with columns for Return to Bid List, NUMBER, TITLE, PROCESS, # BIDS RECEIVED, STATUS, and BID DUE. The selected bid is 'Your Township, Your County' with title 'Community Park - Dog Park Fence', process 'One Step Unsealing', 0 bids received, and a status of 'Draft Cancel Bid'. The bid is due on 1/21/2022 at 10:00 AM, with 11 days, 9 hours, 38 minutes, and 36 seconds remaining. Below the table are tabs for SETUP, CLARIFICATIONS (FROM VENDORS), RESPONSE, ANALYSIS, AWARD, and LOG. The 'SETTINGS' tab is active and highlighted with a red arrow. It contains links for Quick-Start guides and User Videos. At the bottom, there are buttons for Lock, Hide, Clone, Delete, and Edit, followed by a list of settings: NUMBER (Your Township, Your County), STATUS (Draft), VENDOR SERVICE AREA VIEW (Yes), TITLE (Community Park - Dog Park Fence), CLARIFICATION NOTICE (Yes), VENDOR CATEGORY VIEW (No), BID TYPE (Fixed Fee Contract), BID SUBMISSION NOTICE (Yes), and ACCESS (Public).

*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.

The screenshot displays the 'Settings' tab in the PennBid system. On the left is a dark sidebar with navigation options: Home, Dashboard, Companies, Bids, Activities, Doc Library, Reports, and Setup. The main content area is divided into several sections, each with a red arrow pointing to its header:

- Primary:** A header section with a dropdown menu set to 'Primary'.
- BID STATE/COUNTY AREAS (1 record):** A table with columns 'CODE' and 'FULL NAME'. It shows one entry: 'Butler Co, PA' with the full name 'Pennsylvania Pennsylvania > Butler Co, PA Butler Co, PA'.
- BID CATEGORIES (5 records):** A table with columns 'CODE', 'TITLE', and 'FULL NAME'. It lists five categories: 330 FENCING, 650 PARK, PLAYGROUND, RECREATIONAL AREA AND SWIMMING POOL EQUIPMENT AND SUPPLIES, 912 CONSTRUCTION SERVICES, GENERAL (INCL. MAINTENANCE AND REPAIR SERVICES), 913 CONSTRUCTION SERVICES, HEAVY (INCL. MAINTENANCE AND REPAIR SERVICES), and 988 ROADSIDE, GROUNDS, RECREATIONAL AND PARK AREA SERVICES.
- BID EVENTS (1 record):** A table with columns 'TITLE', 'DESCRIPTION', 'LOCATION', 'EVENT START DATE', 'EVENT END DATE', 'VIEW EVENT REGISTRANTS', and 'ATTENDANCE III'. It shows one event: 'Pre-Bid Meeting' with a description 'A mandatory virtual pre-bid meeting will be held on January 7, 2022. See meeting location for link.', location 'www.zoom.us/j/9114331f...', start date '1/7/2022 1:00 PM', end date '1/7/2022 2:00 PM', and attendance 'Yes'.



## 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).

The screenshot shows the PennBid interface with a sidebar on the left containing navigation options: Home, Dashboard, Companies, Bids, and Activities. The main content area displays a project summary for 'Community Park - Dog Park Fence' with details like 'One Step Unsealing', '# BIDS RECEIVED: 0', and 'STATUS: Draft'. Below this, a series of tabs are visible: SETUP, CLARIFICATIONS (FROM VENDORS), RESPONSE, ANALYSIS, AWARD, and LOG. The 'SETUP' tab is active, and within it, the 'BID FORM- QUESTIONS (RFI)' sub-tab is highlighted. Below the tabs, there are links for 'Quick-Start guides' and 'User Videos'.

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.

The screenshot shows the 'BIDDER ACKNOWLEDGMENTS & REPRESENTATIONS' section of the PennBid interface. It features a table with columns for 'REFERENCE NUMBER', 'ORDER', 'QUESTION', 'RESPONSE REQUIRED', and 'RESPONSE TYPE'. There are four rows of questions listed under the heading 'Bidder Acknowledgments & Representations'. Each row includes a checkbox, a reference number, a question text, and a response type of 'Text Box'. The first row is highlighted in yellow.

REFERENCE NUMBER	ORDER	QUESTION	RESPONSE REQUIRED	RESPONSE TYPE
<input type="checkbox"/> 1.		Bidder shall list addenda by number and date. If no addenda issued, write "NONE". (Enter I Agree or I Do Not Agree) The following documents are attached to and made a condition of this Bid and should be included in the Supporting Documents: Surety Company Bond or Certified Check in the amount of \$1,000.00 payable to Cranberry Township; Non-Collusion Affidavit; Bidder's Experience; Certificate of Compliance with the PA Steel Products Procurement Act; Public Works Employment Verification Form; If applicable, PennDOT forms (MS-944, Provisions of Workmen's Compensation Act). (Enter I Agree or I Do Not Agree)	Yes	Text Box
<input type="checkbox"/> 2.	2	The Board of Supervisors reserves the right to reject any or all bids and to waive any defects or irregularities in the best interest of the Township.	Yes	Text Box
<input type="checkbox"/> 3.	3	All bids shall remain irrevocable for 60 days after the actual date of the opening in compliance with Act 317 of 1978	Yes	Text Box
<input type="checkbox"/> 4.	4		Yes	Text Box



## 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.

The screenshot shows the PENNBID web application interface. The left sidebar contains navigation options: Home, Dashboard, Companies, Bids, Activities, and Doc Library. The main content area displays project details for 'Community Park - Dog Park Fence' in 'Your Township, Your County'. The project status is 'Draft' and the bid due date is '1/21/2022 10:00 AM'. Below the project details, there are tabs for 'SETUP', 'CLARIFICATIONS (FROM VENDORS)', 'RESPONSE', 'ANALYSIS', 'AWARD', and 'LOG'. Under the 'SETUP' tab, there are sub-tabs: 'SETTINGS', 'BID FORM- QUESTIONS (RFI)', 'BID FORM- PRICING' (which is highlighted and has a mouse cursor over it), 'DOCUMENTS', and 'BIDDERS'. A note at the bottom of the screenshot states: 'The "BID FORM- QUESTIONS (RFI)" and "BID FORM- PRICING" tabs are used to develop the online 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.

The screenshot shows the 'PRICING LINE ITEMS' section of the PENNBID web application. The section title is 'PRICING LINE ITEMS (3 records)'. Below the title, there are icons for 'Est.', 'Preview', and a trash can. The main content is a table with the following columns: 'REFERENC...', 'ORDER', 'TYPE', 'DESCRIPTION', 'UNIT OF MEASURE', 'QUANTITY', 'UNIT PRICE ESTIMATE', 'ALLOW COMM...', 'ALLOWANCE I...', 'ALLOW N...', and 'ALLOV...'. The table contains three rows of data under the 'Base Bid' section. The first row is highlighted in yellow and has a pencil icon next to it, indicating it is selected for editing. The data in the table is as follows:

REFERENC...	ORDER	TYPE	DESCRIPTION	UNIT OF MEASURE	QUANTITY	UNIT PRICE ESTIMATE	ALLOW COMM...	ALLOWANCE I...	ALLOW N...	ALLOV...
1	1	Base	6 ft. high, Chain Link Fence with Top and Bottom Rail	L.F.	1,400.00	No	No	No		
2	2	Base	6 ft. x 6 ft. high, Maintenance Gate	Each	4.00	No	No	No		
3	3	Base	4 ft. x 6 ft. height, Man-Gate	Each	4.00	No	No	No		



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.

**Pricing Line Item**

Cancel Save

ITEM GROUP ⓘ *	UNIT OF MEASURE ⓘ *	ALLOW ALT ITEM ⓘ
Base Bid	L.F.	<input type="checkbox"/>
CATEGORY ⓘ	QUANTITY ⓘ *	ALLOW COMMENT ⓘ
Please choose one	1,400.00	<input type="checkbox"/>
REFERENCE NUMBER ⓘ *	UNIT PRICE ESTIMATE ⓘ	INTERNAL ONLY
1	\$	<input type="checkbox"/>
DESCRIPTION *	ALLOWANCE ITEM ⓘ	ESTIMATE SOURCE
6 ft. high, Chain Link Fence with Top and Bc	<input type="checkbox"/>	Manual
VERSION	ALLOW NO BID ⓘ	SOURCE DESCRIPTION
Enter Text	<input type="checkbox"/>	
TYPE ⓘ *	USER FIELD 1	USER FIELD 2
Base	Enter Text	Enter Text
	USER FIELD 3	Enter Text



## 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.

The screenshot shows the PENNBID web application interface. On the left is a dark sidebar with navigation options: Home, Dashboard, Companies, Bids (highlighted), Activities, and Doc Library. The main content area has a light background and contains a table of bid information. Below the table are several tabs: SETUP, CLARIFICATIONS (FROM VENDORS), RESPONSE, ANALYSIS, AWARD, LOG, SETTINGS, BID FORM- QUESTIONS (RFI), BID FORM- PRICING, DOCUMENTS (highlighted with a mouse cursor), and BIDDERS. Below the tabs is a note: "The 'BID FORM- QUESTIONS (RFI)' and 'BID FORM- PRICING' tabs are used to develop the online bid form."

NUMBER	TITLE	PROCESS	# BIDS RECEIVED	STATUS	BID DUE: 1/21/2022 10:00 AM
Your Township, Your County	Community Park - Dog Park Fence	One Step Unsealing	0	Draft Cancel Bid	OPENS IN 11 days: 9 hours: 36 minutes: 28 seconds

SETUP   CLARIFICATIONS (FROM VENDORS)   RESPONSE   ANALYSIS   AWARD   LOG

SETTINGS   BID FORM- QUESTIONS (RFI)   BID FORM- PRICING   **DOCUMENTS**   BIDDERS

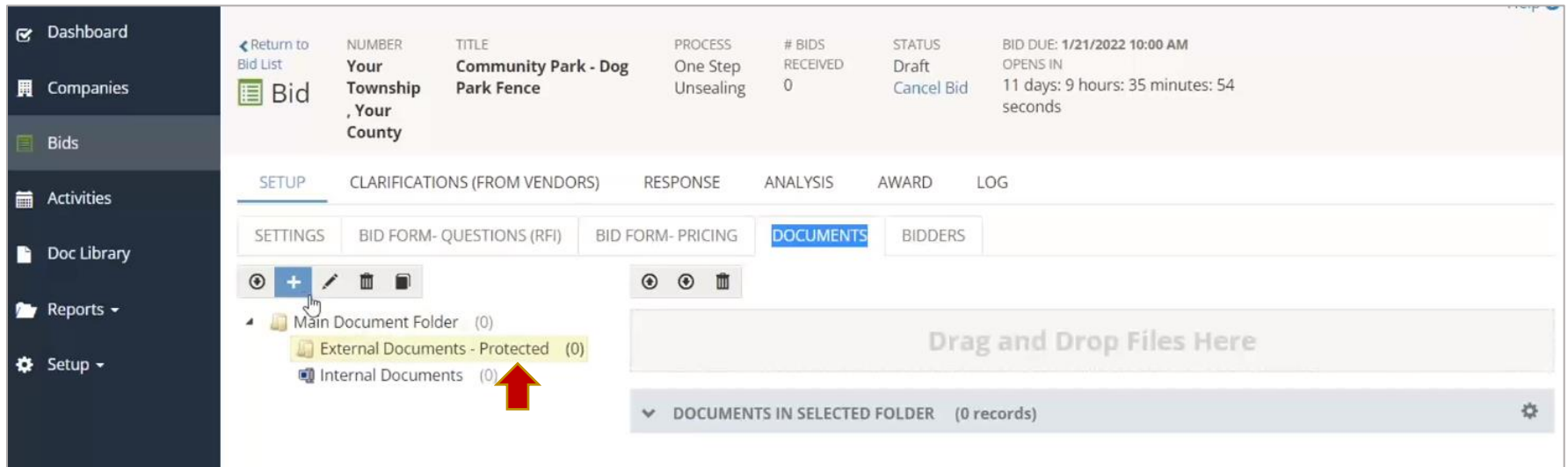
The "BID FORM- QUESTIONS (RFI)" and "BID FORM- PRICING" tabs are used to develop the online bid form.

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

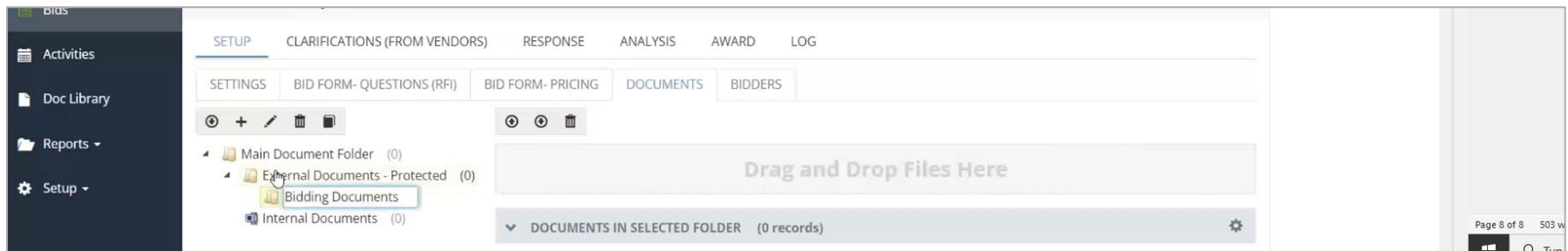




Click on the “External Documents – Protected” folder. Clicking the “+” button will create a sub-folder. You can have as many folders and sub-folder as desired. If you prefer, all project documents can be uploaded into the “External Documents – Protected” folder.



*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.

Dashboard  
Companies  
Bids  
Activities  
Doc Library  
Reports  
Setup

Return to Bid List  
Bid

NUMBER	TITLE	PROCESS	# BIDS RECEIVED	STATUS	BID DUE: 1/21/2022 10:00 AM
Your Township, Your County	Community Park - Dog Park Fence	One Step Unsealing	0	Draft Cancel Bid	OPENS IN 11 days: 9 hours: 28 minutes: 10 seconds

SETUP CLARIFICATIONS (FROM VENDORS) RESPONSE ANALYSIS AWARD LOG

SETTINGS BID FORM- QUESTIONS (RFI) BID FORM- PRICING DOCUMENTS BIDDERS

Main Document Folder (0)  
External Documents - Protected (0)  
Bidding Documents (0)  
Internal Documents (0)

Drag and Drop Files Here  
+ Copy

DOCUMENTS IN SELECTED FOLDER (0 records)

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

Doc Library  
Reports  
Setup

Main Document Folder (0)  
External Documents - Protected (0)  
Bidding Documents (1)  
Internal Documents (0)

Drag and Drop Files Here

DOCUMENTS IN SELECTED FOLDER (1 record)

ATTACHED FILE	FILE DESCRIPTION	BYTES	UPLOADED TIME
<input type="checkbox"/>	bid (4).pdf	801692	12/22/2021 10:31 PM



## 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.

Lock	Hide	Clone	Delete	Edit	
NUMBER ⓘ	Your Township, Your County	STATUS	Draft	VENDOR SERVICE AREA VIEW ⓘ	Yes
TITLE ⓘ	Community Park - Dog Park Fence	CLARIFICATION NOTICE ⓘ	Yes	VENDOR CATEGORY VIEW ⓘ	No
BID TYPE ⓘ	Fixed Fee Contract	BID SUBMISSION NOTICE	Yes	ACCESS ⓘ	Public
PROCESS ⓘ	One Step Unsealing	INCLUDE INTENT TO BID	Yes	BIDDER LIST ACCESS ⓘ	Public
<b>AVAILABLE DATE ⓘ</b>	<b>1/12/2022 8:00 AM</b>	BID BOND OPTION ⓘ	Bond Upload Required	PRICING RESULTS VISIBILITY ⓘ	Public Summary
CLARIFICATION DEADLINE ⓘ	1/14/2022 4:00 PM	BID BOND PERCENTAGE REQUIREMENT ⓘ		CONTACT INFORMATION ⓘ	
DUE DATE ⓘ	1/21/2022 10:00 AM	USER GROUP ⓘ	PennBid - ALL BID VIEW		

*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.

The screenshot shows the PENNBID system interface. On the left is a dark sidebar with navigation options: Dashboard, Companies, Bids (selected), Activities, Doc Library, Reports, and Setup. The main content area displays a bid form for 'Community Park - Dog Park Fence'. The form includes fields for NUMBER, TITLE, BID TYPE, PROCESS, AVAILABLE DATE (highlighted in blue), CLARIFICATION DEADLINE, DUE DATE, STATUS, CLARIFICATION NOTICE, BID SUBMISSION NOTICE, INCLUDE INTENT TO BID, BID BOND OPTION, BID BOND PERCENTAGE REQUIREMENT, USER GROUP, VENDOR SERVICE AREA VIEW, VENDOR CATEGORY VIEW, ACCESS, BIDDER LIST ACCESS, PRICING RESULTS VISIBILITY, and CONTACT INFORMATION. In the top right corner of the form, there are three buttons: 'Clone', 'Delete', and 'Edit'. A red arrow points to the 'Edit' button.

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](mailto:info@pennbid.net).

Documents

NOTE: Please do not edit or remove any files in the Doc Library; these are for download only.  
For more information on the Doc Library, please contact [info@pennbid.net](mailto:info@pennbid.net).

Main Document Folder (0)

- External Documents - Protected (0)
  - Actions-to-List Chart (1)
  - Training Videos (1)
- External Documents - Public (2)
- Internal Documents (0)
  - Bid Form Template Key (1)
  - Client Quick-Start Training Guides (2)

Drag and Drop Files Here

DOCUMENTS (23 records)

ATTACHED FILE	FILE DESCRIPTION	BYTES	UPLOADED TIME
<input type="checkbox"/>	PennBid Quick Guide - Answering Clarifications.pdf	419588	9/30/2020 9:27 AM
<input type="checkbox"/>	PennBid Quick Guide - Awarding Your Project.pdf	530672	2/4/2020 5:01 AM
<input type="checkbox"/>	PennBid Quick Guide - Bid Events.pdf	521146	12/13/2021 3:54 PM
<input type="checkbox"/>	PennBid Quick Guide - Categories and Service Codes.pdf	550711	12/28/2019 2:55 AM
<input type="checkbox"/>	PennBid Quick Guide - Cloning a Project.pdf	817945	12/28/2019 2:55 AM
<input type="checkbox"/>	PennBid Quick Guide - Editing Vendor Account Information.pdf	608212	9/8/2021 7:47 PM
<input type="checkbox"/>	PennBid Quick Guide -		