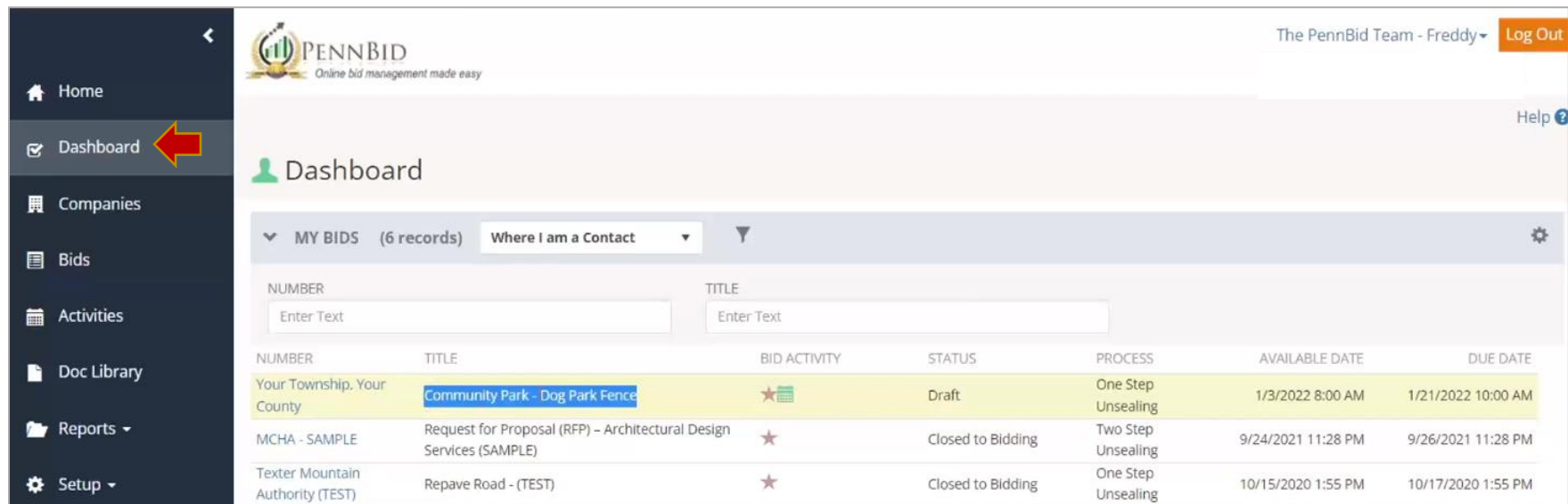


NEW PROJECT REVIEW

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' and 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	Community Park - Dog Park Fence	★	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 due date is '1/21/2022 10:00 AM' with a countdown of '11 days: 9 hours: 38 minutes: 36 seconds'. 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 'Lock' and 'Hide' buttons, and a 'Clone Delete Edit' button. The settings are displayed in a grid:

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

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 PennBid Settings 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 is divided into several sections, each with a red arrow pointing to its header:

- Primary**: A dropdown menu currently set to "Primary".
- BID STATE/COUNTY AREAS (1 record)**: A table with columns CODE and FULL NAME. The entry is "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. The entry is "Pre-Bid Meeting" with a description about a mandatory virtual pre-bid meeting on January 7, 2022.



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 and being clicked by a mouse cursor. Other sub-tabs include 'BID FORM- PRICING', 'DOCUMENTS', and 'BIDDERS'. 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'. The table contains four rows of bidder acknowledgments. The first row is highlighted in yellow. The sidebar on the left shows navigation options: Home, Dashboard, Companies, Bids, Activities, Doc Library, Reports, and Setup. The main content area also shows 'ITEM GROUPS (3 records)' and 'QUESTIONS (13 records)' sections above the table.

REFERENCE NUMBER	ORDER	QUESTION	RESPONSE REQUIRED	RESPONSE TYPE
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
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
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
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 dashboard. On the left is a navigation menu with options: Home, Dashboard, Companies, Bids, Activities, and Doc Library. The main content area displays project information 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 this, 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 with 3 records. The table has columns: REFERENC..., ORDER, TYPE, DESCRIPTION, UNIT OF MEASURE, QUANTITY, UNIT PRICE ESTIMATE, ALLOW COMM..., ALLOWANCE I..., ALLOW N..., and ALLOV. The first item is selected and highlighted in yellow. A pencil icon is visible next to the quantity '1'.

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 ⁱ *
Base Bid

UNIT OF MEASURE ⁱ *
L.F.

ALLOW ALT ITEM ⁱ

CATEGORY ⁱ
Please choose one

QUANTITY ⁱ *
1,400.00

ALLOW COMMENT ⁱ

REFERENCE NUMBER ⁱ *
1

UNIT PRICE ESTIMATE ⁱ
\$

INTERNAL ONLY

DESCRIPTION *
6 ft. high, Chain Link Fence with Top and Bc

ALLOWANCE ITEM ⁱ

ESTIMATE SOURCE
Manual

VERSION
Enter Text

ALLOW NO BID ⁱ

SOURCE DESCRIPTION

TYPE ⁱ *
Base

USER FIELD 1
Enter Text

USER FIELD 2
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, Activities, and Doc Library. The main content area has a light background. At the top, there is a header with a 'Return to Bid List' link and a 'Bid' icon. Below this is a table with the following data:

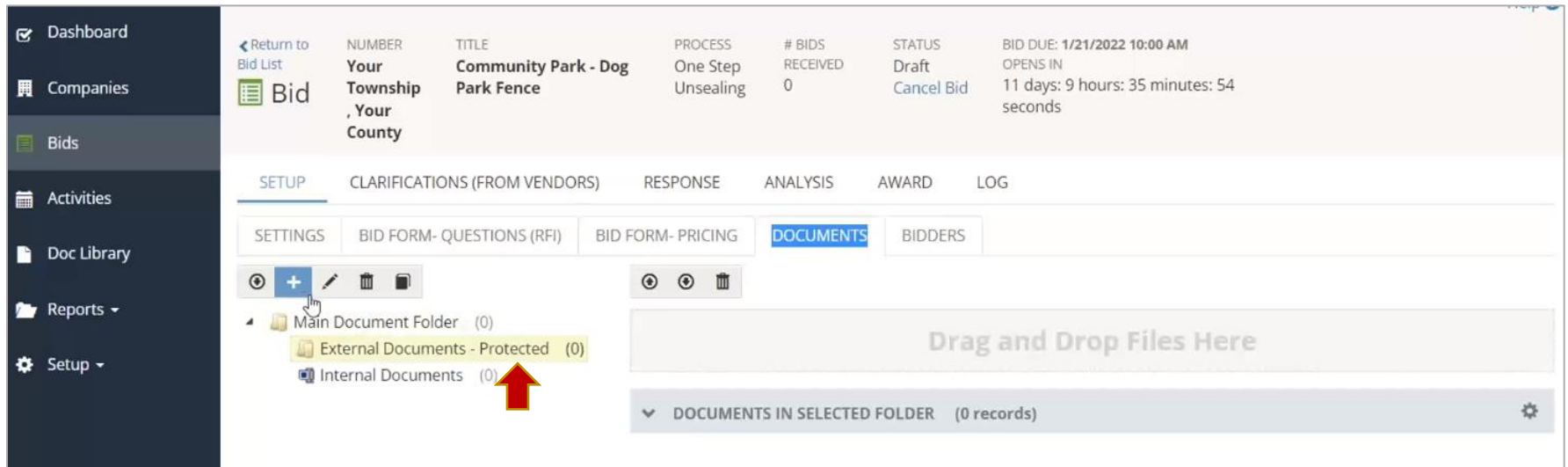
NUMBER	TITLE	PROCESS	# BIDS RECEIVED	STATUS	BID DUE: 1/21/2022 10:00 AM
Your Township, Your County	Community Park - Dog Park Fence	One Step Unsealing	0	Draft Cancel Bid	OPENS IN 11 days: 9 hours: 36 minutes: 28 seconds

Below the table is a horizontal menu with tabs: SETUP, CLARIFICATIONS (FROM VENDORS), RESPONSE, ANALYSIS, AWARD, and LOG. Underneath this is another row of tabs: SETTINGS, BID FORM- QUESTIONS (RFI), BID FORM- PRICING, DOCUMENTS (highlighted with a mouse cursor), and BIDDERS. At the bottom of the screenshot, a note reads: "The 'BID FORM- QUESTIONS (RFI)' and 'BID FORM- PRICING' tabs are used to develop the online bid form."

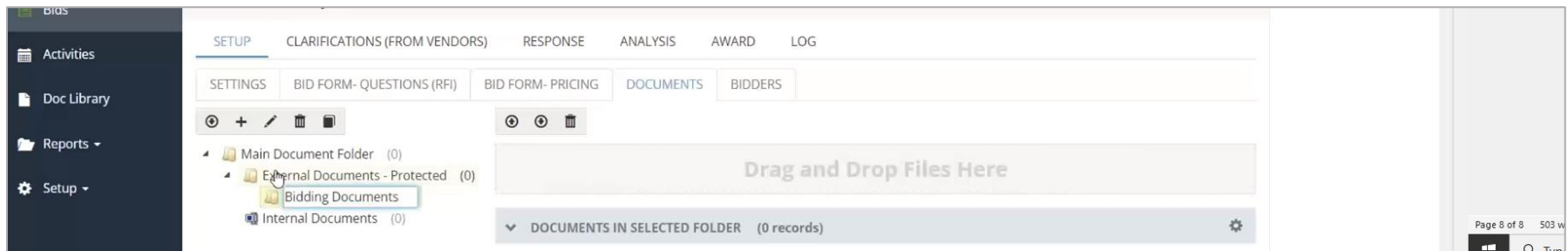
Note: We recommend uploading regular documents in PDF format, as these can't be altered in any way.



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	VENDOR SERVICE AREA VIEW ⓘ
TITLE ⓘ	Community Park - Dog Park Fence	Draft	Yes
BID TYPE ⓘ	Fixed Fee Contract	CLARIFICATION NOTICE ⓘ	VENDOR CATEGORY VIEW ⓘ
PROCESS ⓘ	One Step Unsealing	Yes	No
AVAILABLE DATE ⓘ	1/12/2022 8:00 AM	BID SUBMISSION NOTICE	ACCESS ⓘ
CLARIFICATION DEADLINE ⓘ	1/14/2022 4:00 PM	Yes	Public
DUE DATE ⓘ	1/21/2022 10:00 AM	INCLUDE INTENT TO BID	BIDDER LIST ACCESS ⓘ
		Yes	Public
		BID BOND OPTION ⓘ	PRICING RESULTS VISIBILITY ⓘ
		Bond Upload Required	Public Summary
		BID BOND PERCENTAGE REQUIREMENT ⓘ	CONTACT INFORMATION ⓘ
		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 displays the PENNBID web application 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 shows bid details for 'Community Park - Dog Park Fence'. The 'AVAILABLE DATE' field is highlighted in blue and shows '1/12/2022 8:00 AM'. In the top right corner, there are three buttons: 'Clone', 'Delete', and 'Edit'. A red arrow points to the 'Edit' button. The interface also includes a 'Lock Hide' button and various other fields like 'NUMBER', 'TITLE', 'BID TYPE', 'PROCESS', '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'.

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.

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.

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 -		