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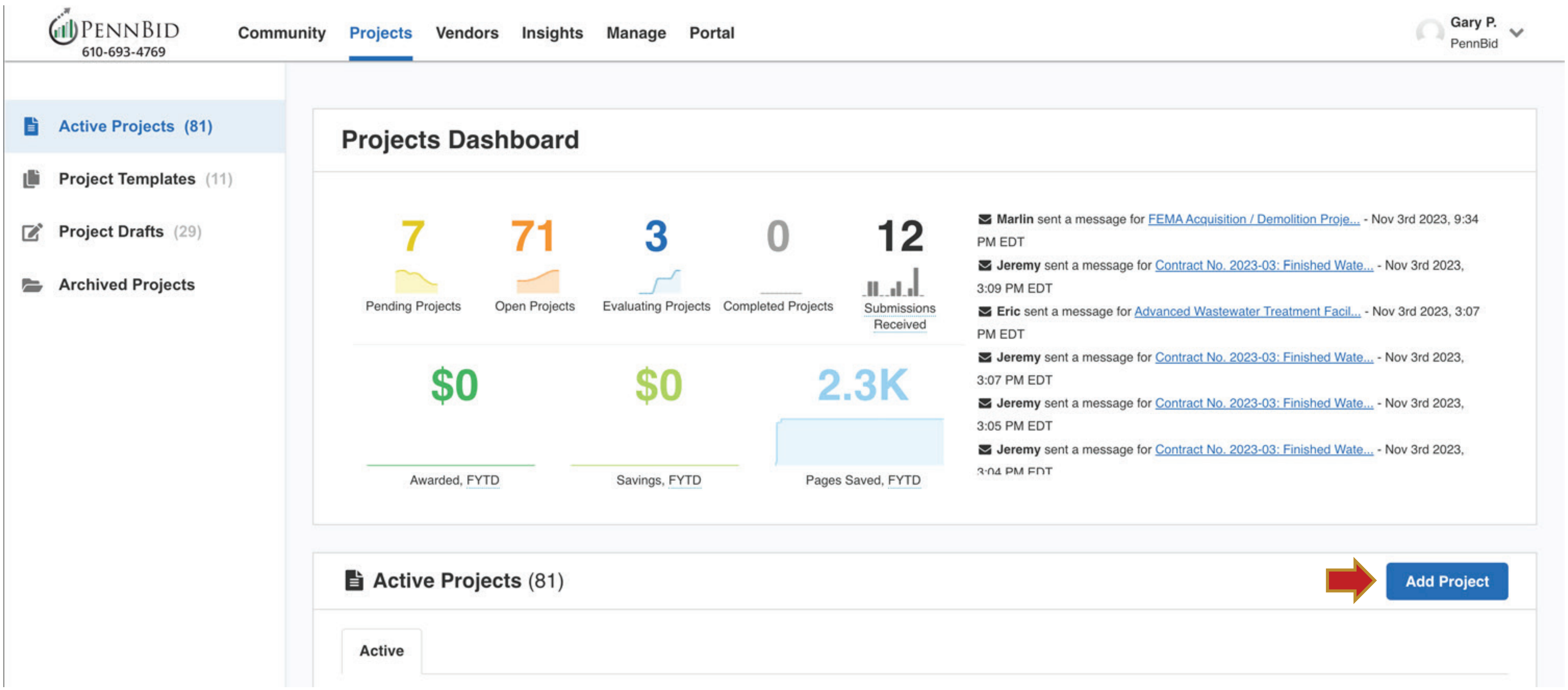
New Project Setup (Multi-Category Decision - MCD)

New Project Setup – The process of setting up a multi-category decision (MCD) solicitation in the PennBid platform from start to finish.

Creating A Draft Project – Getting Started

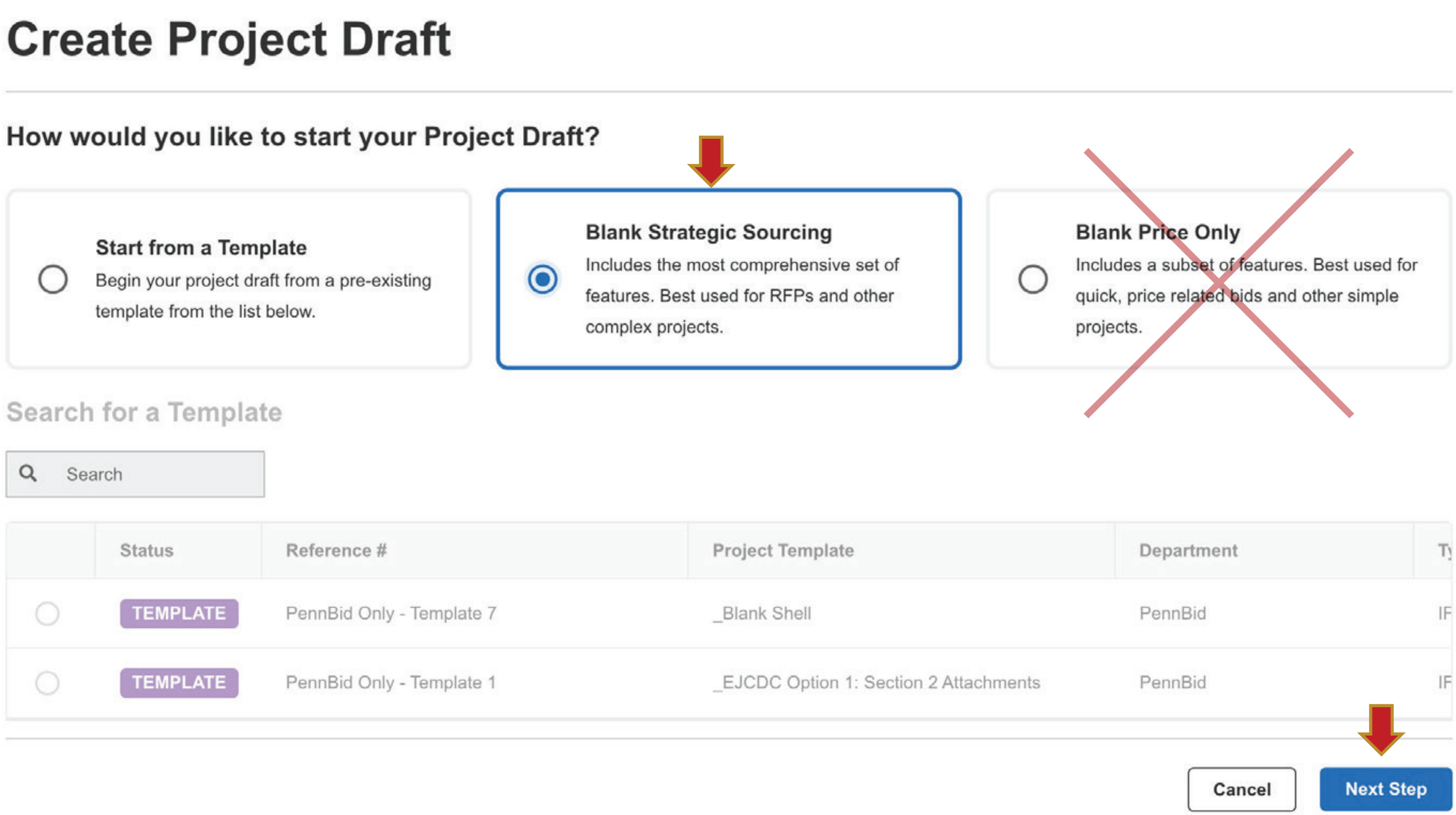
When you login to PennBid, you land on the **Projects** page. From the **Active Project** section, click the **Add Project** button to begin.



Create Project Draft

Select the **Blank Strategic Sourcing** option and then click the **Next Step** button at the bottom of the screen.

If you have a saved **MCD Template** you want to use, choose the **Start from a Template** option. Select the desired **TEMPLATE** and the **Next Step** button. We recommend <u>not using</u> the **Blank Price Only** option. This format has limitations in function and project setup and will limit the type of project you can create.



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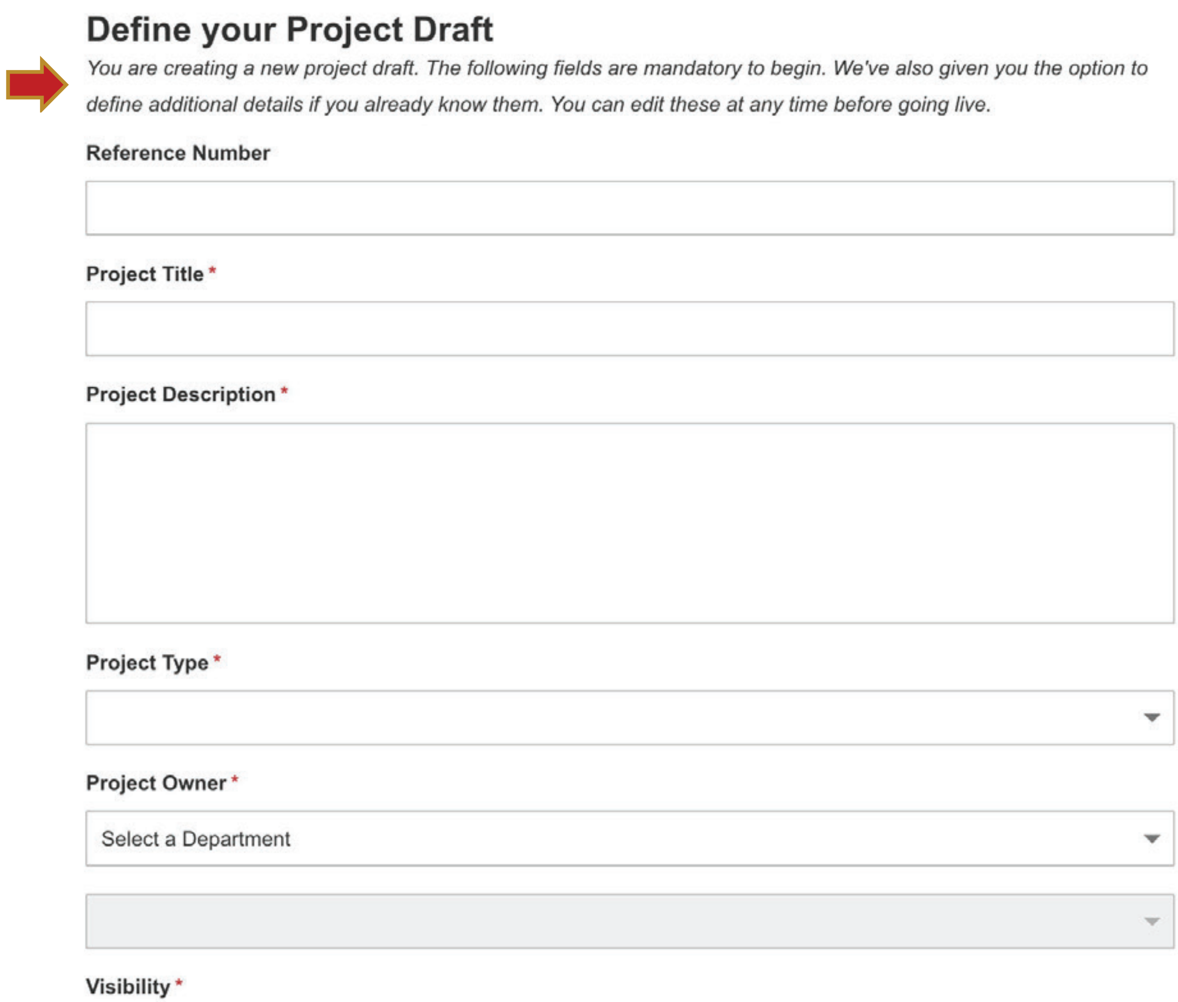
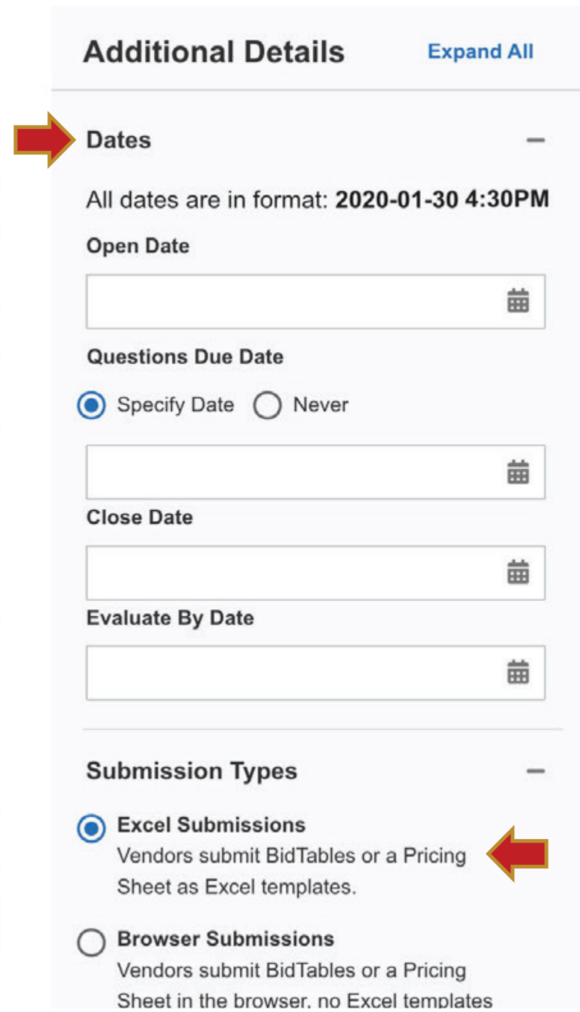
Define your Project Draft

Enter the **Reference Number** (solicitation owner & county name), **Project Title**, **Project Description** (advertisement), **Project Type** (*we recommend RFP, ITB, or IFB*), **Project Owner** - your **Department** and **User**, and set **Visibility** to (*Public, Private, or Invite-Only*).

Enter Dates: Open Date, Questions Due Date (cut off date/time for bidders to ask questions), Close Date, and Evaluate By Date.

Submission Types: Make sure that Excel Submissions (default) is selected.





Additional Details

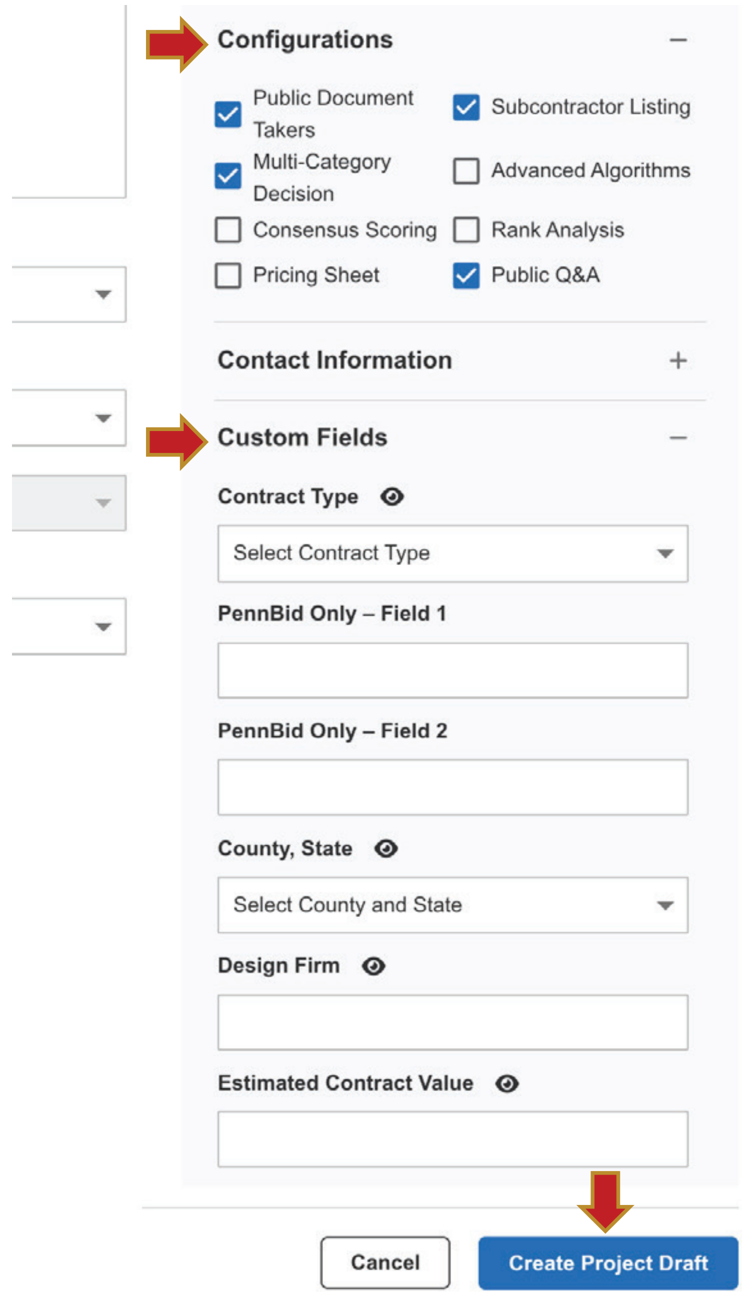
Configurations (select the following):

- Public Document Takers
- Subcontrator Listing
- Multi-Category Decision
- Public Q&A

Custom Fields:

- Contract Type for an MCD project must be set to **Fixed Fee Contract**
- Select County, State from drop-down
- Estimated Contract value (if desired)

Click the **Create Project Draft** to continue.



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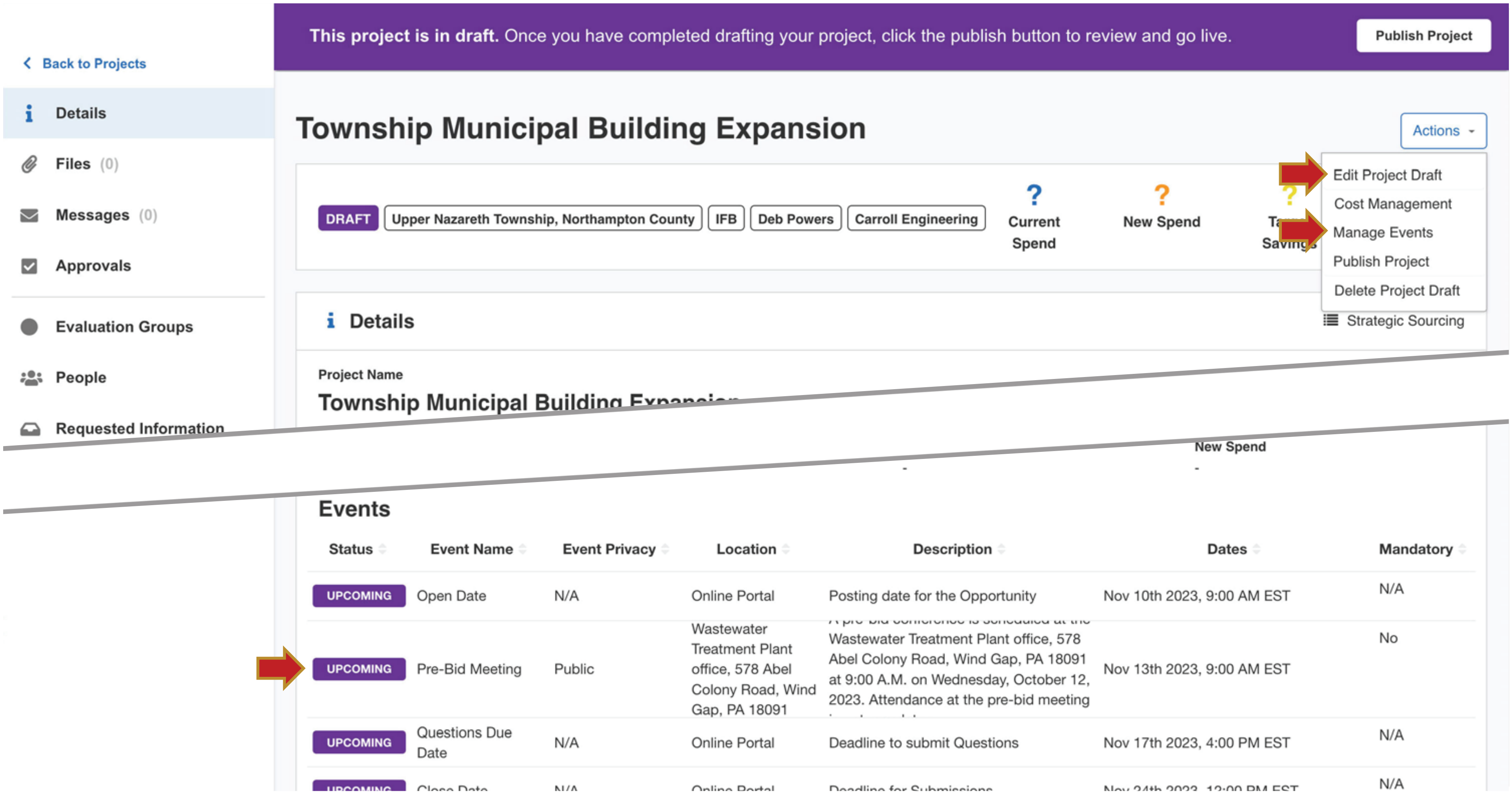
Select **Edit Project Draft** to make event detail changes.

Select **Manage Events** to add additional **Events** to your project such as a **Pre-Bid Meeting**.



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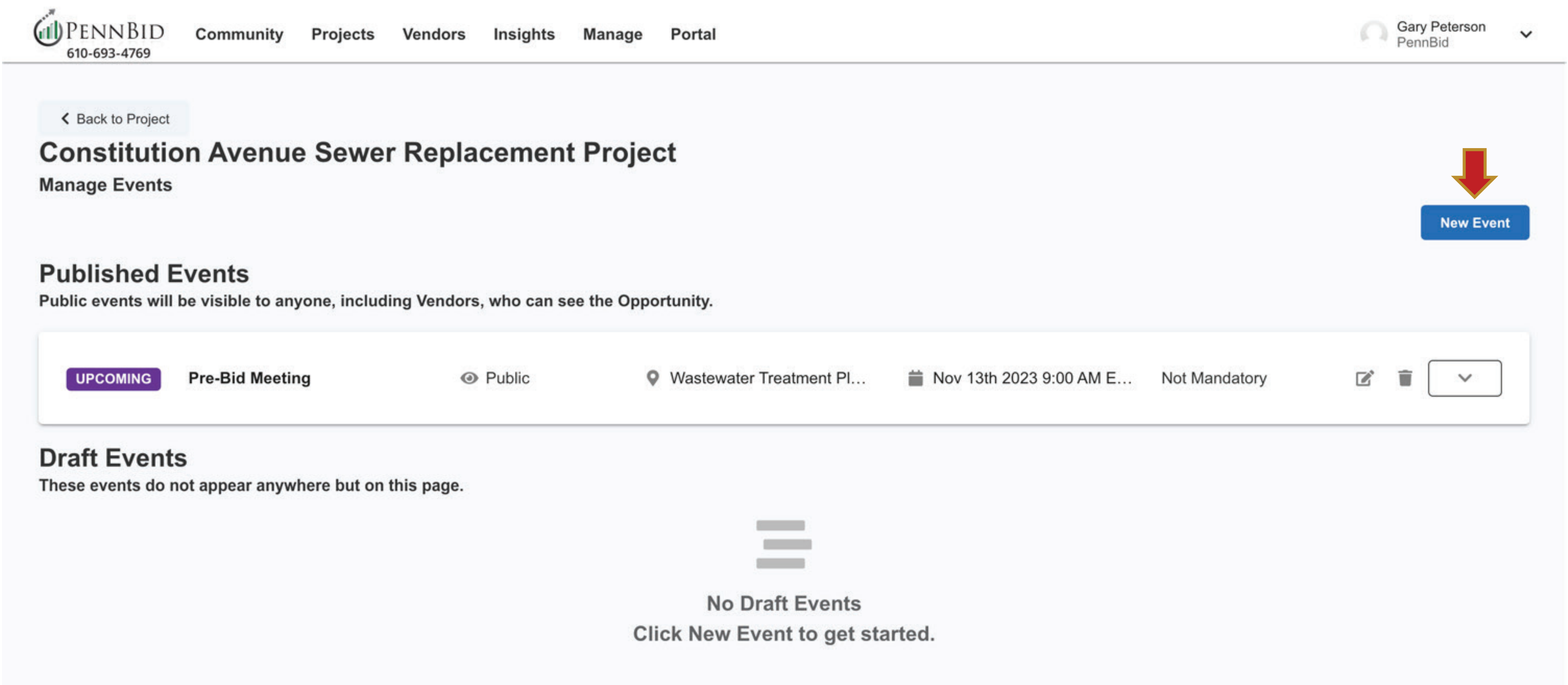
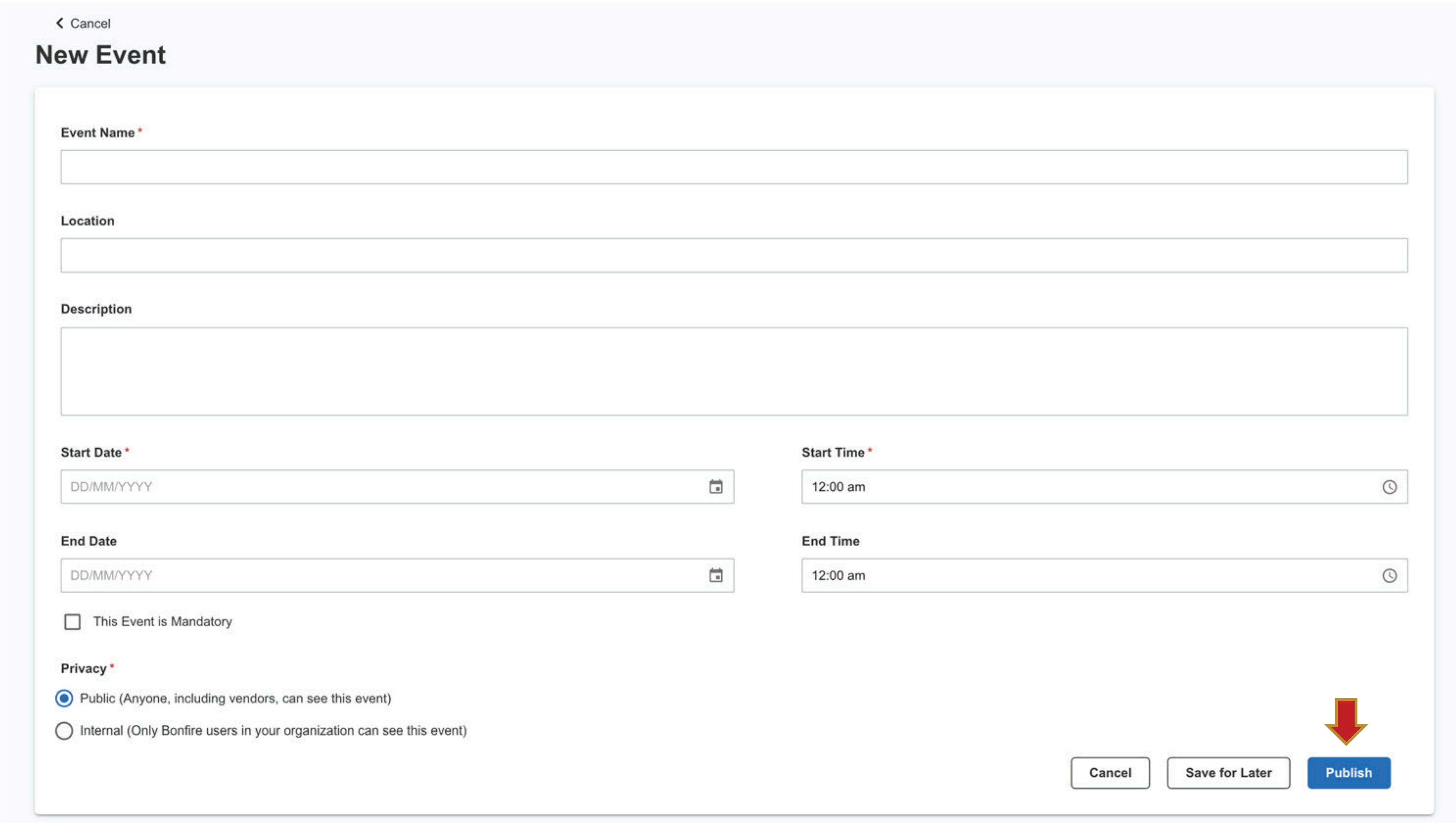
Click the **New Event** button to add an **Event**.



Enter all the **New Event** details about your scheduled **Event**. Events can be set to **Public** or **Internal**. For bidders to see your event select the **Public** option.

Click the **Publish Button** to make the **Published Event** available when you project goes live.



Files Section

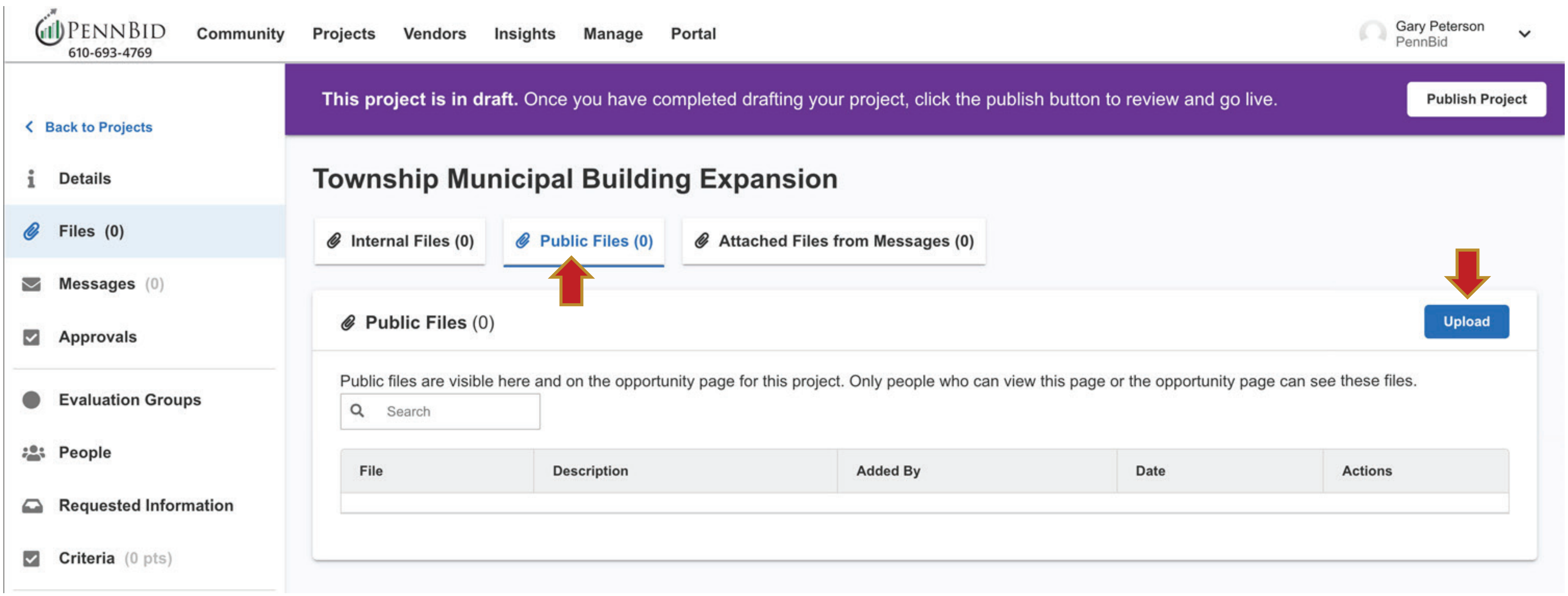
Select the **Files** section. You will upload all final versions of project documents here to be available to bidders to download. This includes, but is not limited to: the advertisement, plans, specs, instructions to bidders, blank required documents for bidders to fill out, etc.

Note: We recommend uploading documents in PDF format.

There are 3 tabs here including **Internal Files**, **Public Files**, and **Attached Files from Messages**. All files meant for public (vendor/bidder) view and download must be uploaded into the **Public Files** tab.

To add files for bidders, click on the **Public Files** tab and then click the blue **Upload** button on the right of the screen. Simply drag your files straight into the “Drag and Drop Files Here” box or browse files from your computer.

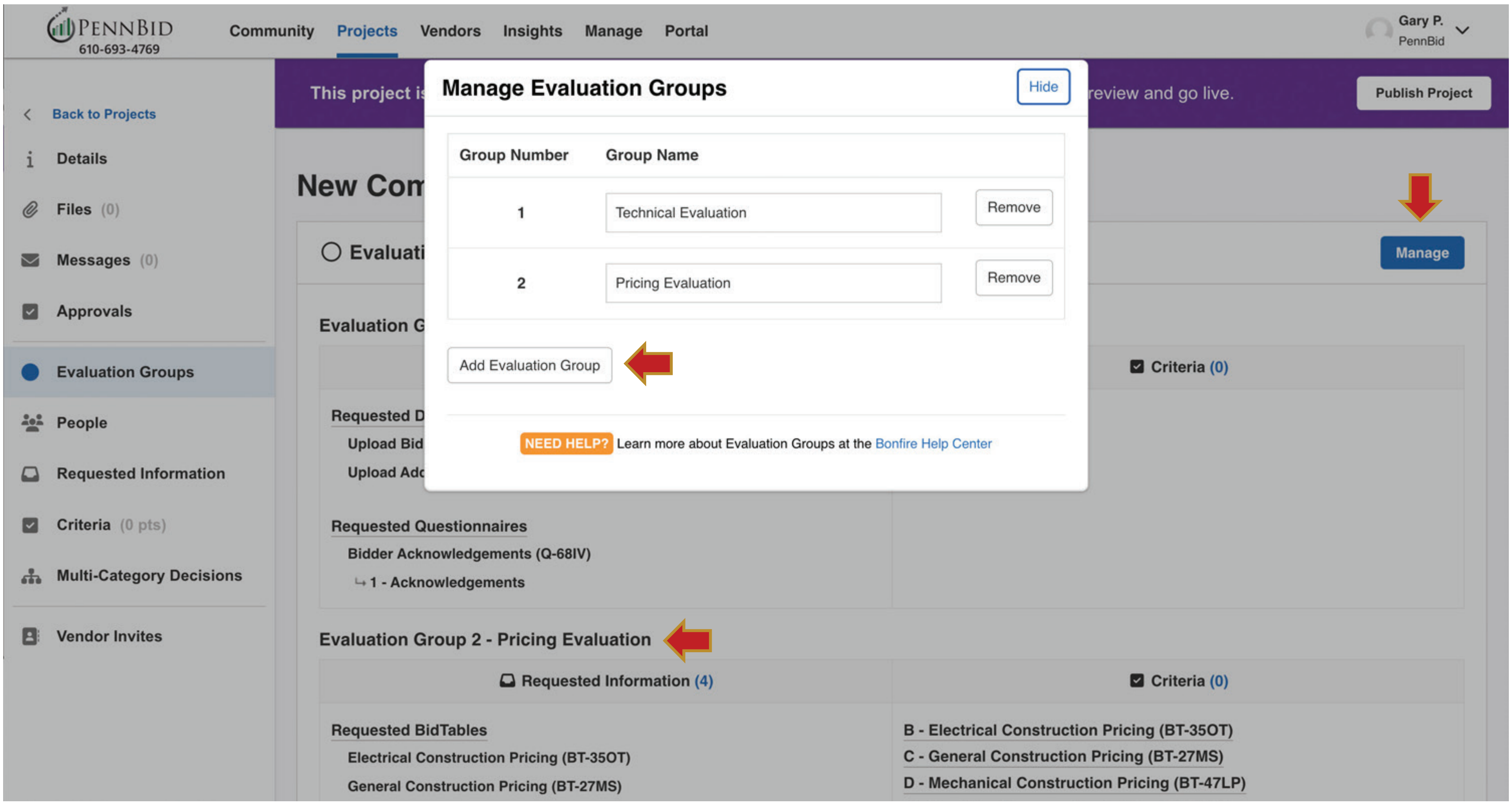
Note: Files will auto sort alpha numerically; please label accordingly and/or upload zip files to create a fixed file organization structure.



Evaluation Groups Section

A second **Evaluation Group** should be added for the **Pricing Evaluation** (Requested BidTables). To add the additional Evaluation Group click the **Manage** button and click **Add Evaluation Group**.

In the **Evaluation Group 1 - Technical Evaluation** you'll see the Technical items to be **Released** when a project is unsealed. **Releasing Evaluation Group 2 - Pricing Evaluation** will release the pricing elements within the MCD Project.



People Section

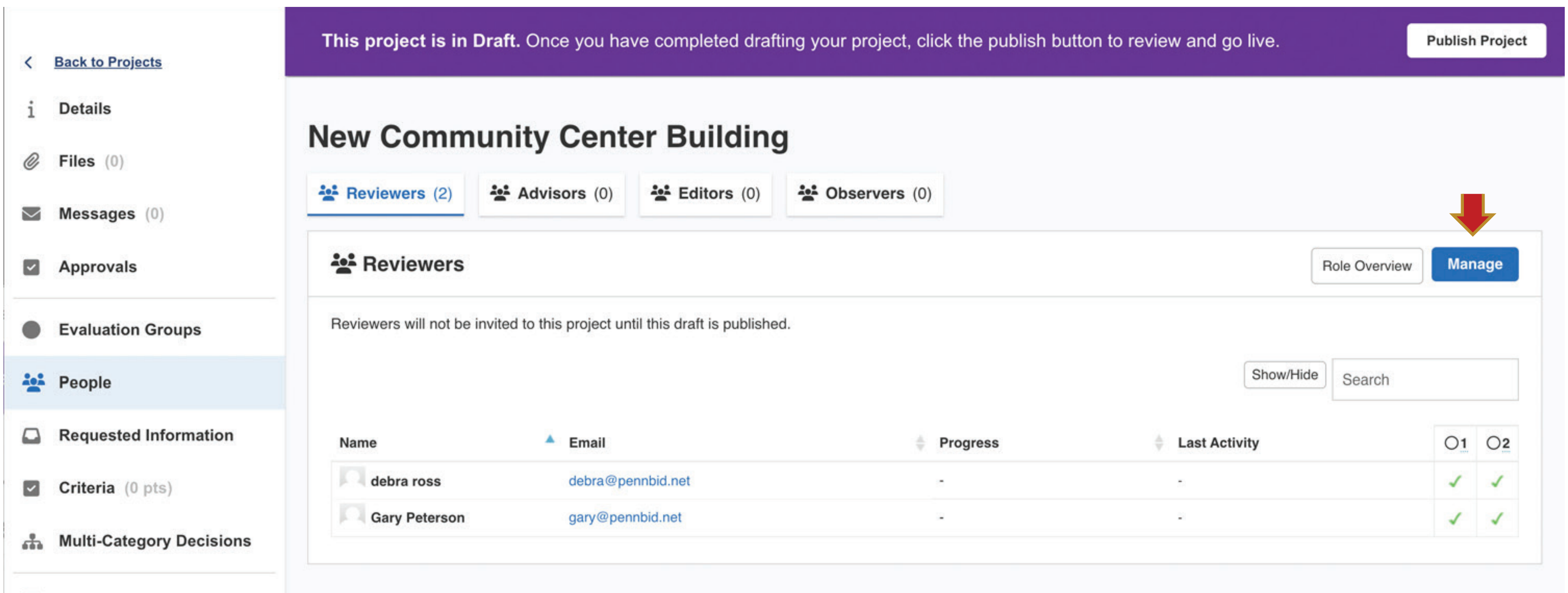
This is where you will add individuals to be **Reviewers**, **Advisors**, or **Observers** of your project.

Reviewers – This Role can be assigned at any point to anyone inside or outside of your Department. This Role allows those assigned to view the Bid Results in tabular form as well as utilizing the Evaluate and Score Criteria functions.

Advisors – This Role can be assigned at any point to anyone inside or outside of your Department. This Role is able to view all aspects of assigned Projects without the ability to adjust or edit in any capacity. If Enabled this Role can view Submissions.

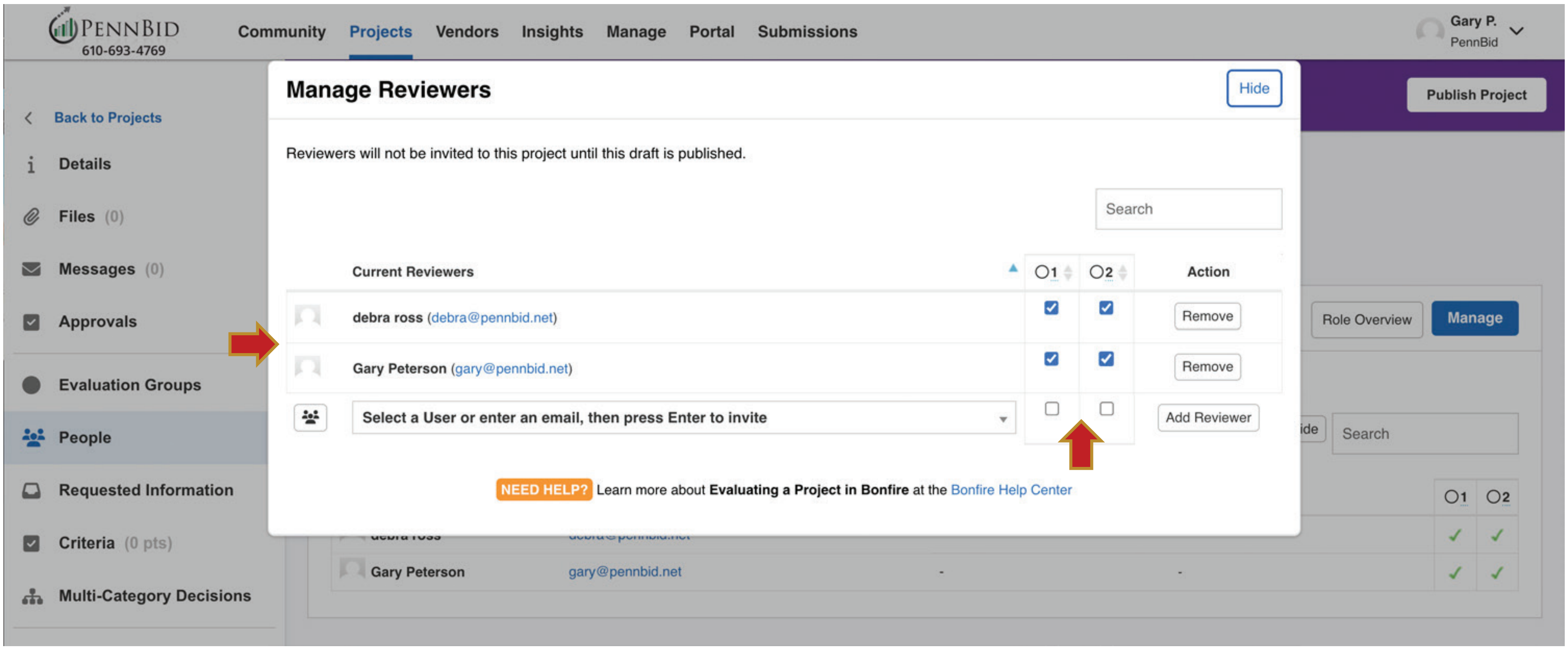
Editors – This Role can only be assigned during Draft Status. This Role enables the assigned to view and edit the project in every aspect excluding Publishing.

Observers – This Role can be assigned at any point to anyone inside or outside of your Department. This Role is able to view all aspects of assigned Projects without the ability to adjust or edit in any capacity.



Make sure you select the correct **Evaluation Group** for every **Person** added.

It is important to make sure you ☑ check each **Evaluation Group(s)** each **Reviewer** requires access to when the project is **Released**. If not, when a project is **Released** (or opened), they may not have access to all the information submitted by bidders.



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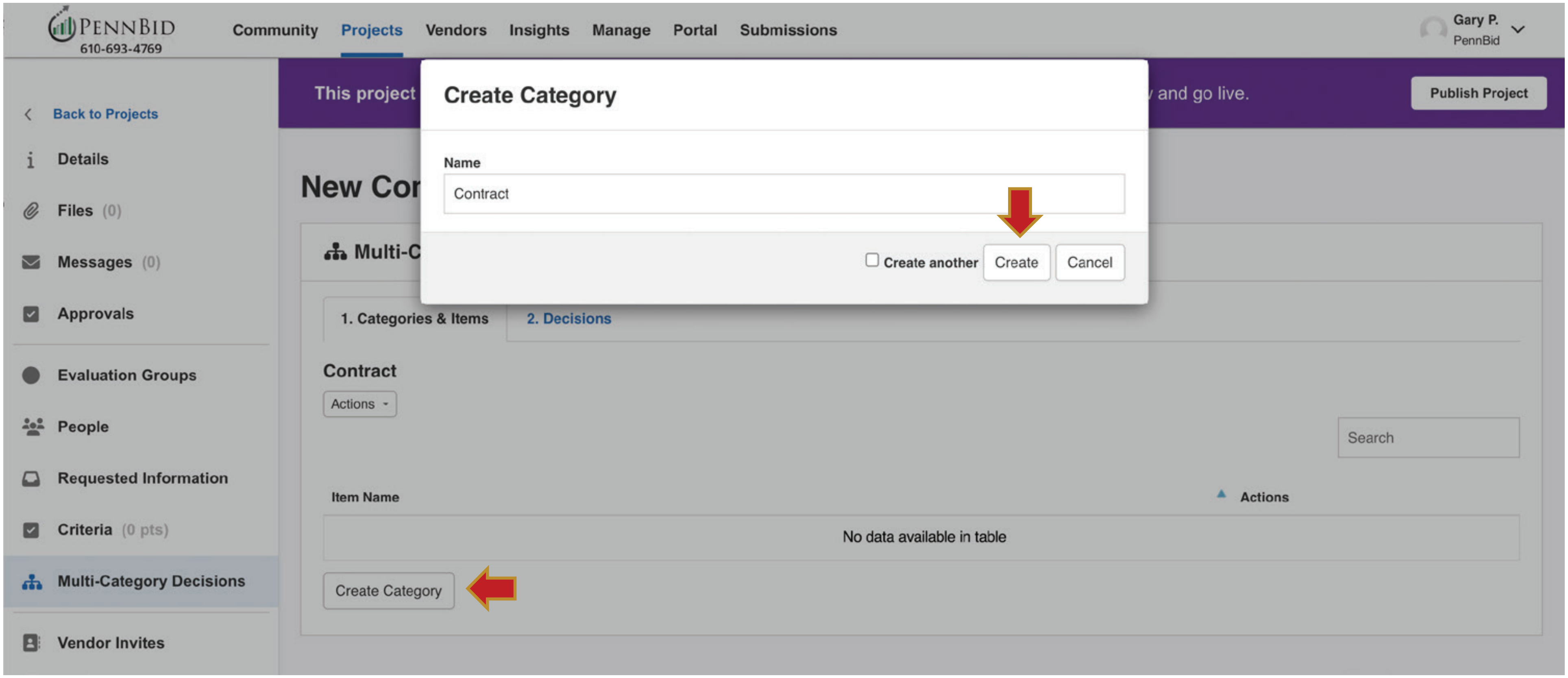
Creating Multi-Category Decisions

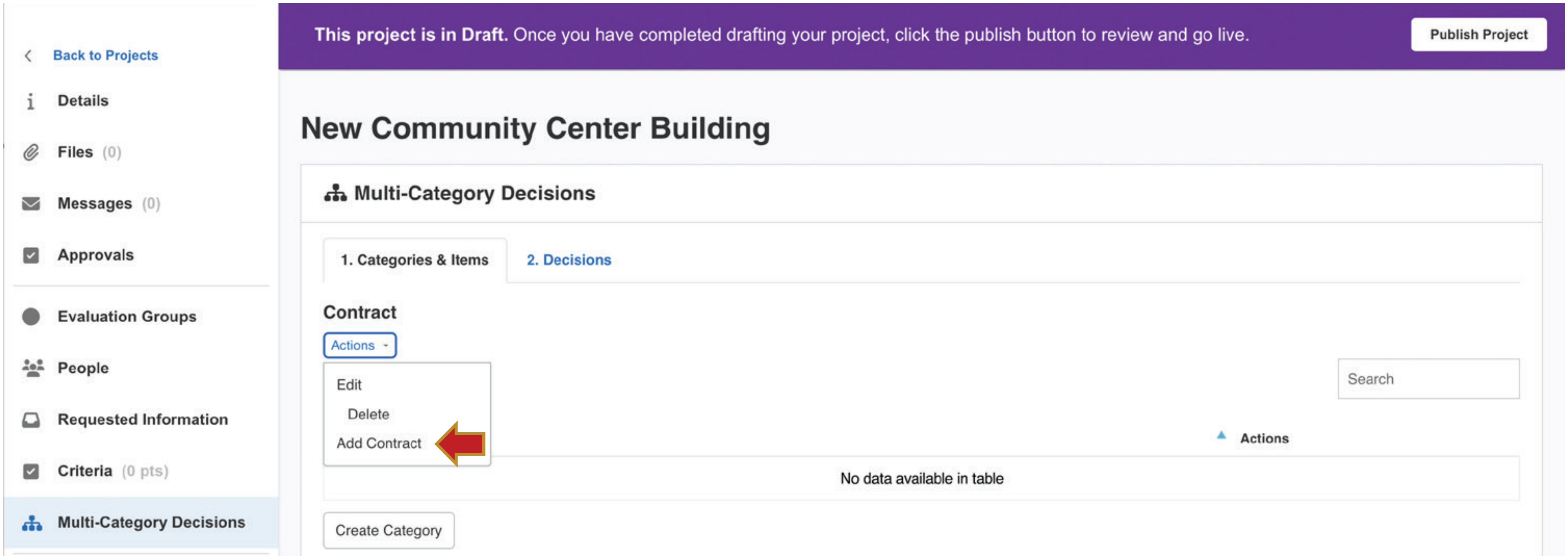
Begin by clicking the **Multi-Category Decisions** tab on the left, select the **1. Category & Items** tab, and click the **Create Category** button.

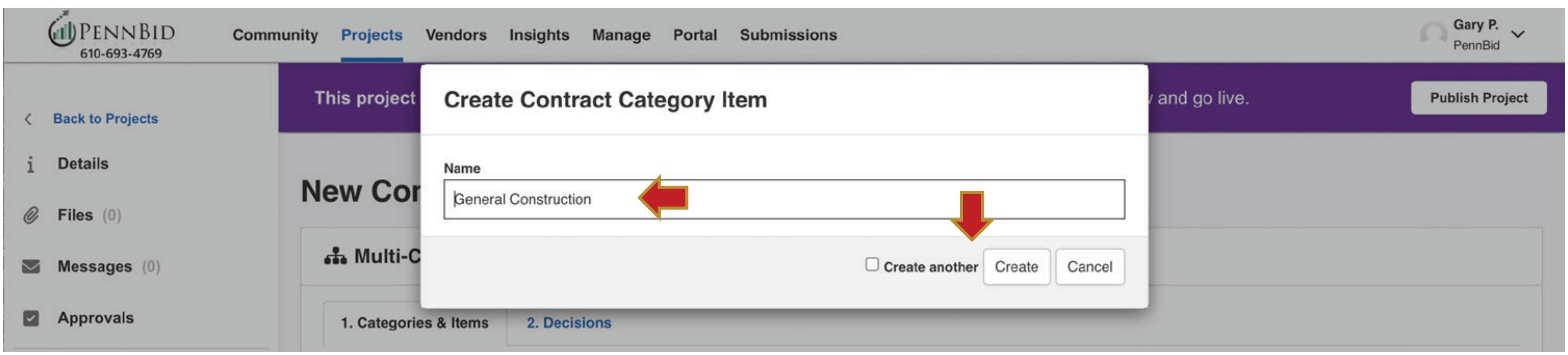
In the pop-up screen enter "*Contract*" into the **Name** field and click the **Create** button.



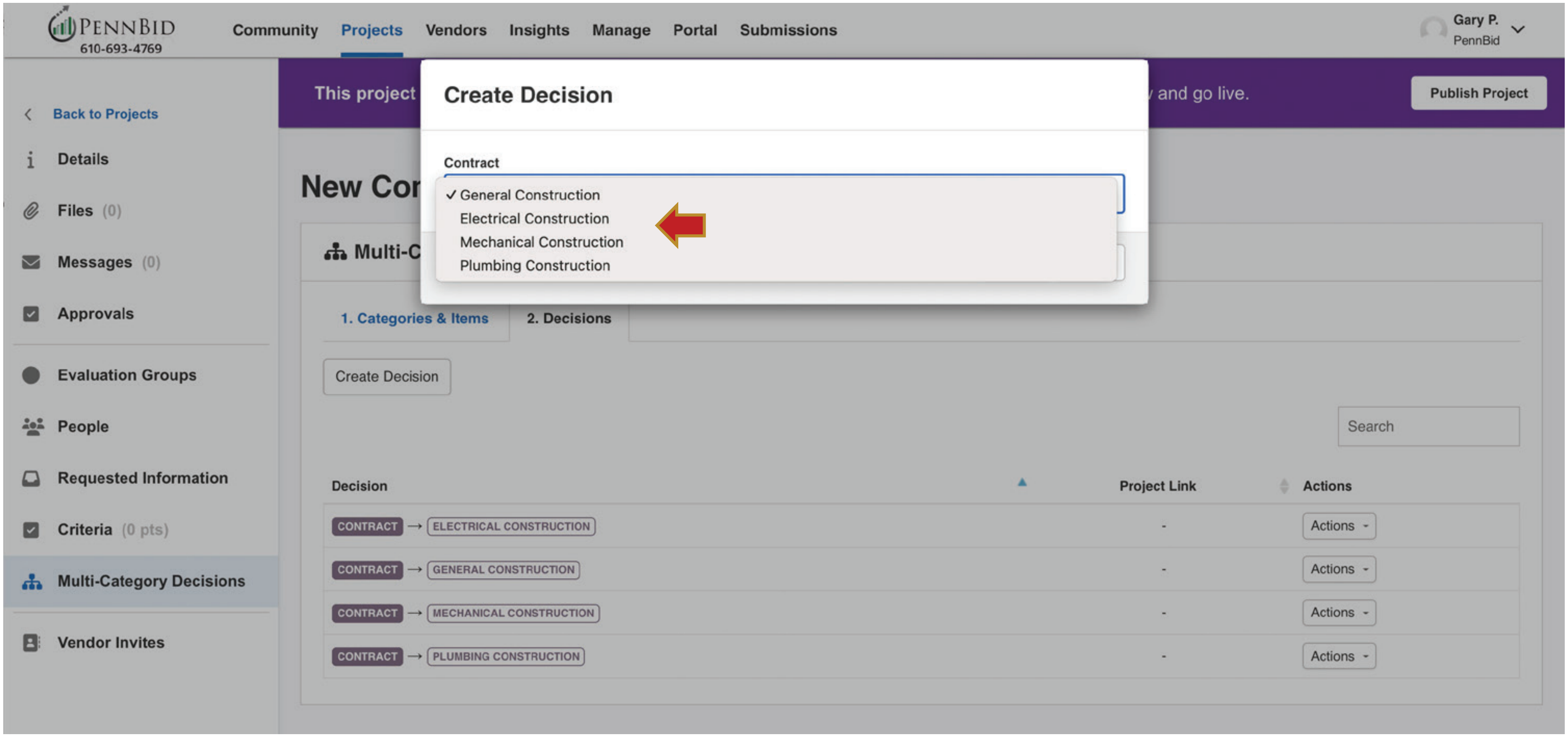
Now create all necessary **Contracts** required in your **MCD Project** (i.e. General, Electrical, Mechanical, etc.).

Click the **Actions** button and select the **Add Contract** option from the drop-down menu. Enter the name for each **Contract Category Item** and click the **Create** button. Check the ☑ **Create another** button to keep the screen open to create multiple Contracts.





Select the **2. Decisions** tab and create a decision for each of the contracts by using the **Contract** drop-down menu.



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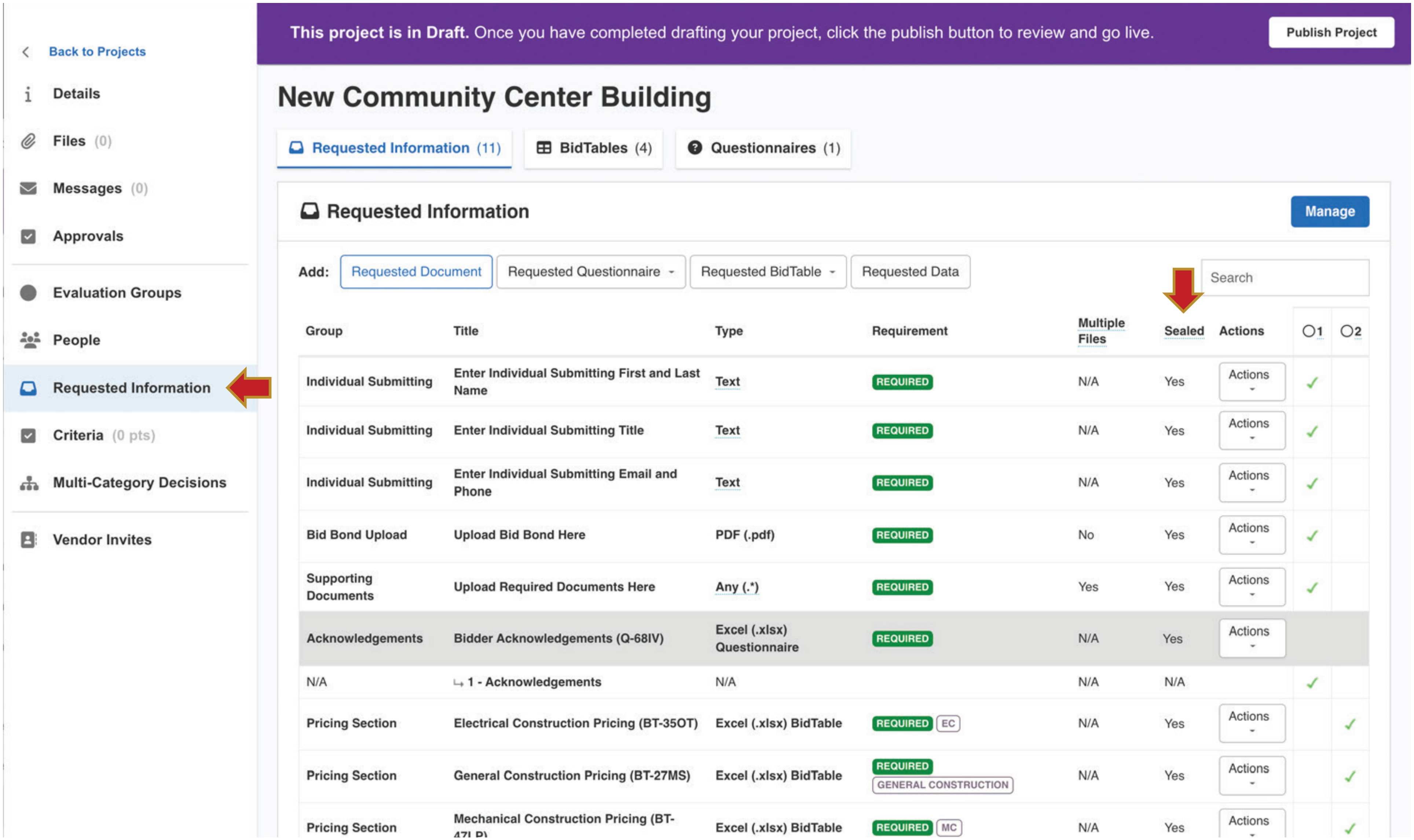
Requested Information Section

Select the **Requested Information** section. Make sure <u>all</u> items are **Sealed**.



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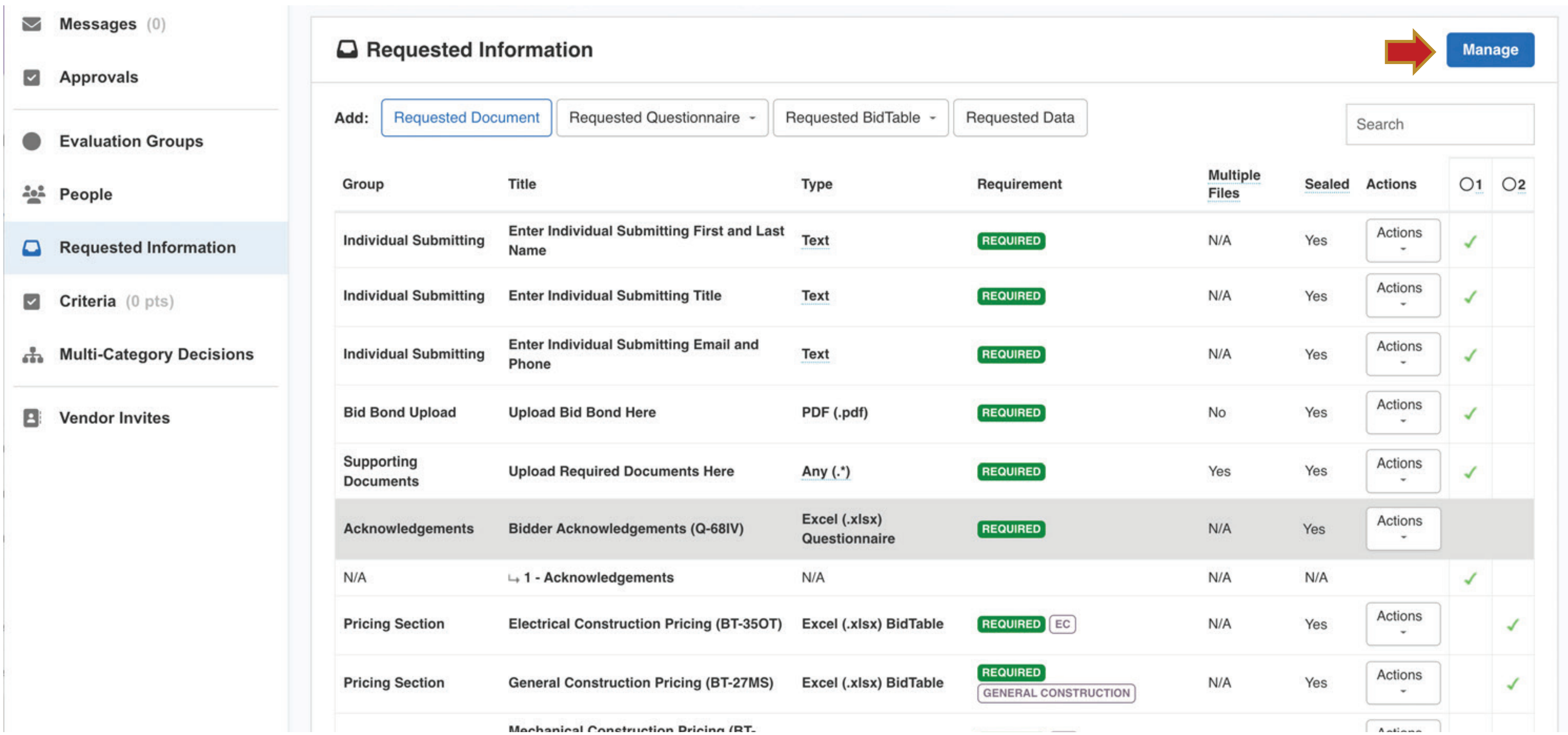
Requested Information Tab

In the **Requested Information** tab you establish all items bidders must submit with their bid.

Select the appropriate **Group**, **Title**, **Type**, whether it is **REQUIRED** or **OPTIONAL**, single or **Multiple Files** upload, and all items are assigned to an **Evaluation Group**. PennBid recommends sealing all items on the Requested Information tab.

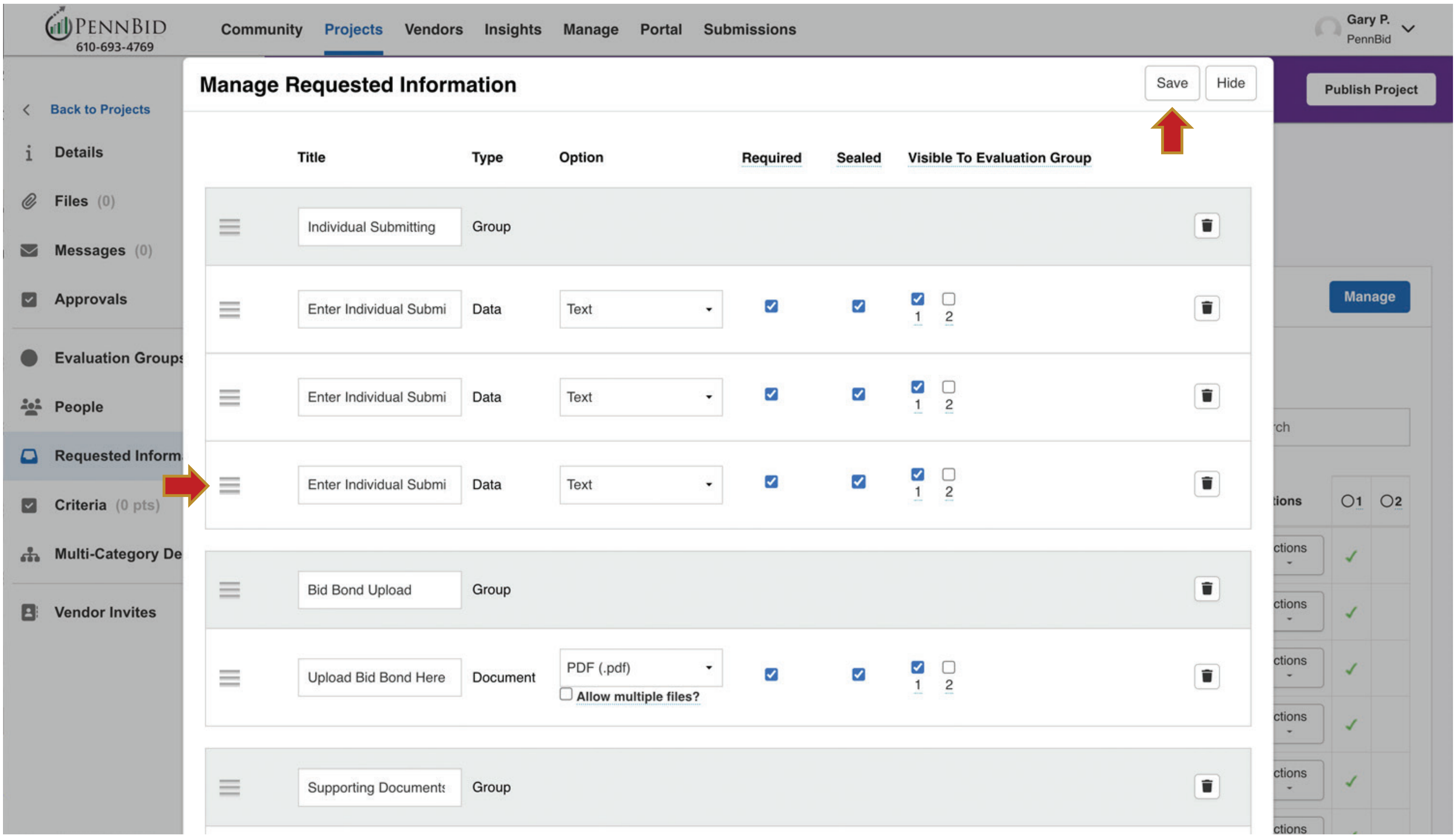
Types of Requested Information include: **Text** responses, **Supporting Document** uploads, **Bid Bond** upload, **Bidder Acknowledgments** (*Questionnaires*), and **Pricing** (*BidTables*).

Click the **Manage** button to manage all **Requested Information** for your project.



To add items, click the appropriate buttons at the bottom of the screen. This includes:
Group, **Requested Document**, **Requested Questionnaire** (*bidder acknowledgments*), **Requested BidTable** (*pricing items*), and **Requested Data**. Items or Groups can be deleted by clicking the trash can icon to the right of each item.

Group and Item order can be changed by clicking and dragging using the three bars on the left edge of the screen.



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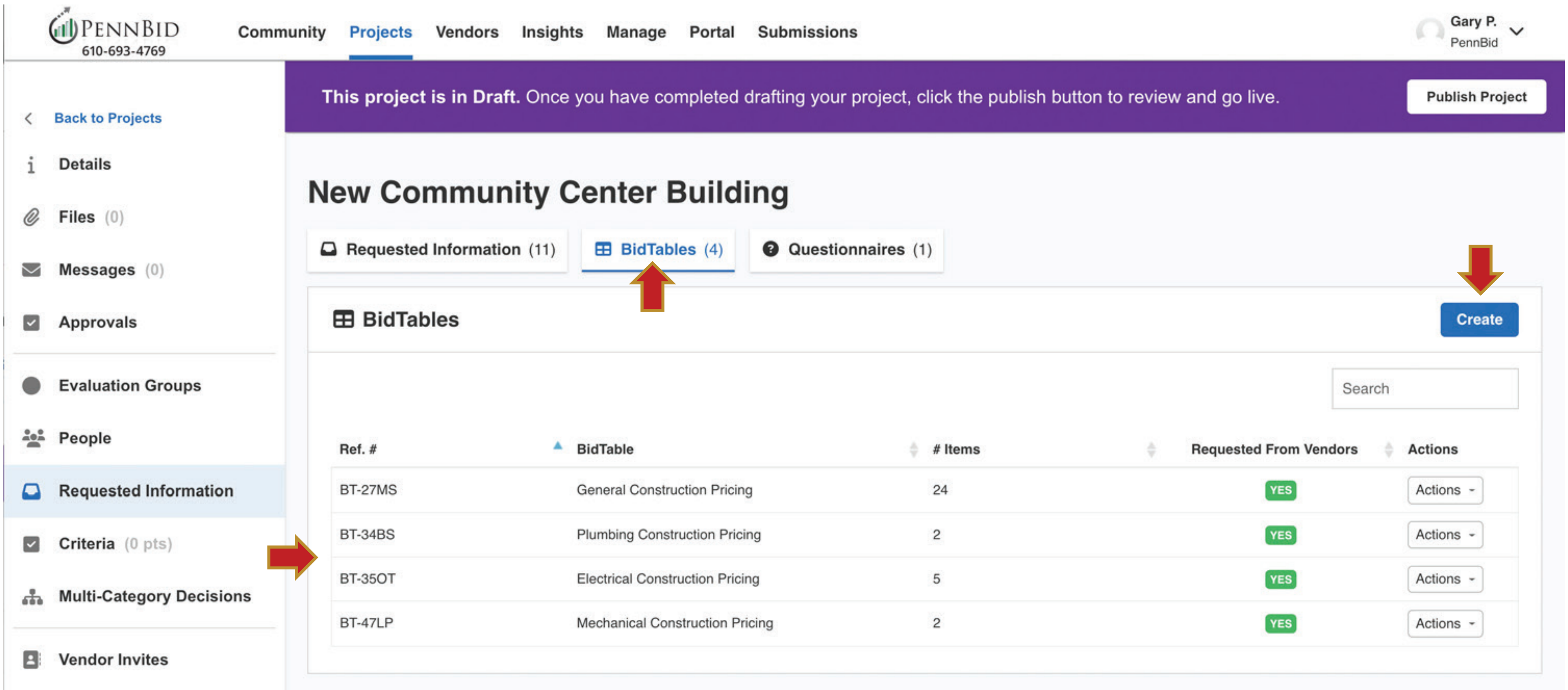
BidTables Tab

The pricing portion(s) or **BidTables** related to your project are set up here. You will need to create a separate **BidTable** for each contract/ decision required for your **Multi-Category Decision** (MCD) project.

To create a new **BidTable**, click the **Create** button on the right side of the screen. For more information about creating **BidTables** download our "Creating A Bid Table" guide.

This creates a new "**Untitled BidTable**" with a Bonfire code in parenthesis (this allows the system to associate your BidTable with the correct project and cannot be changed).

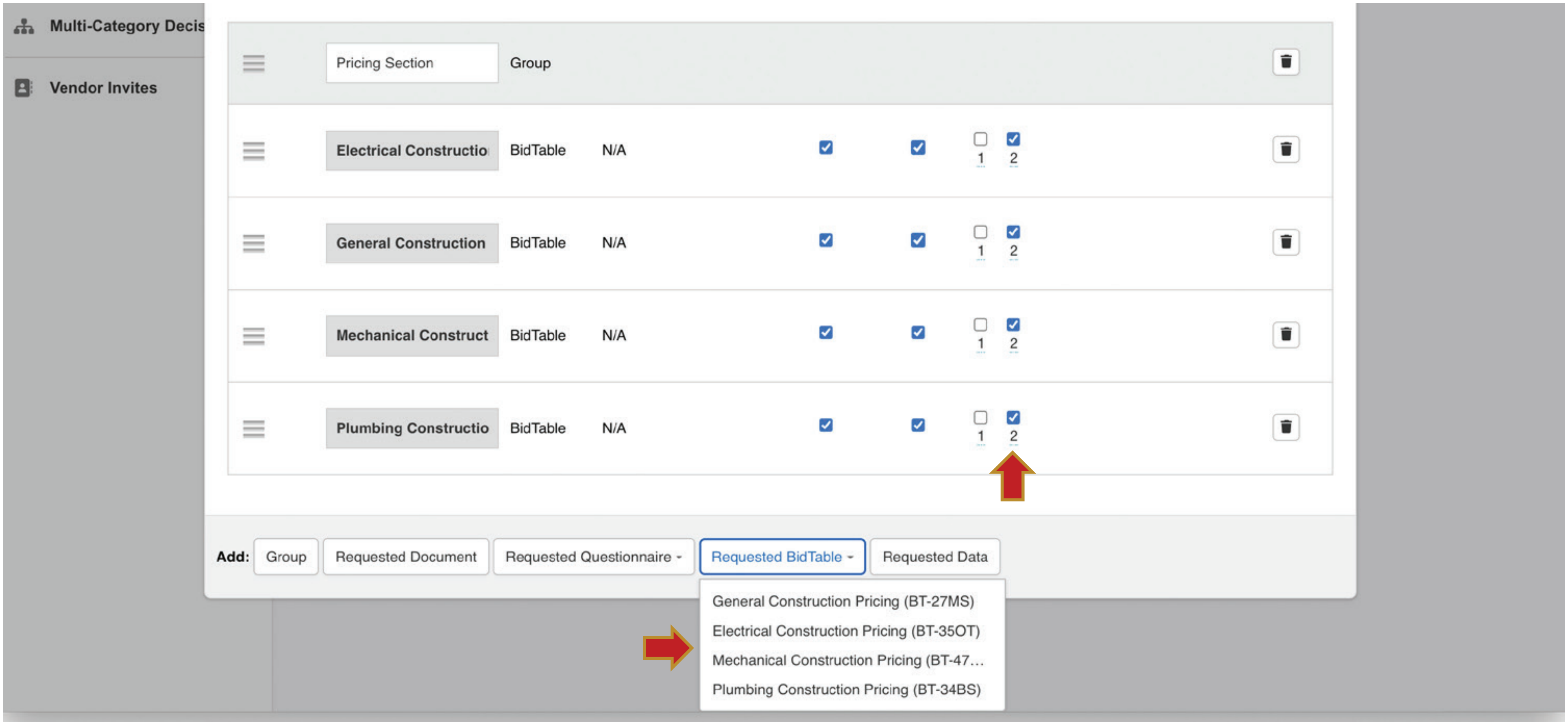


Map your final **BidTables(s)** to you project by returning to the **Requested Information** tab. Click the **Manage** button on the right. Scroll to the bottom of the pop-up screen and click the **Requested BidTable** button. Add (map) the **BidTables** to the Pricing Section Group within the **Requested Information** area.

Notice: Make sure to **check** the box to make the BidTable **Visible To Evaluation Group 2**.

After adding your **BidTables** to the **Manage Requested Information** screen, simply drag them to the correct information group using the three (3) lines to the left of the **BidTable Title**.

Map all contract **BidTables** to **Evaluation Group 2 - Pricing Evaluation**.



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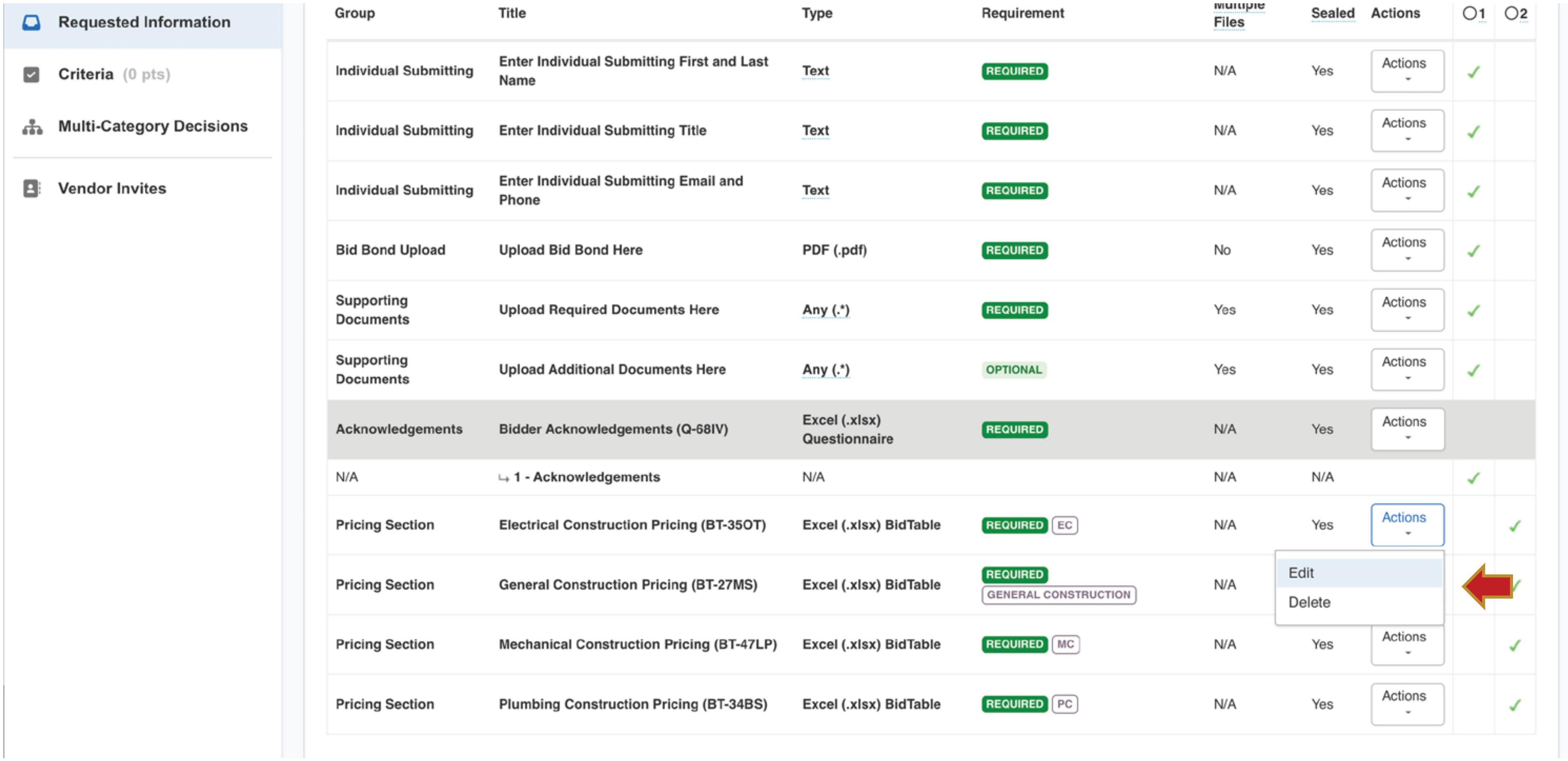
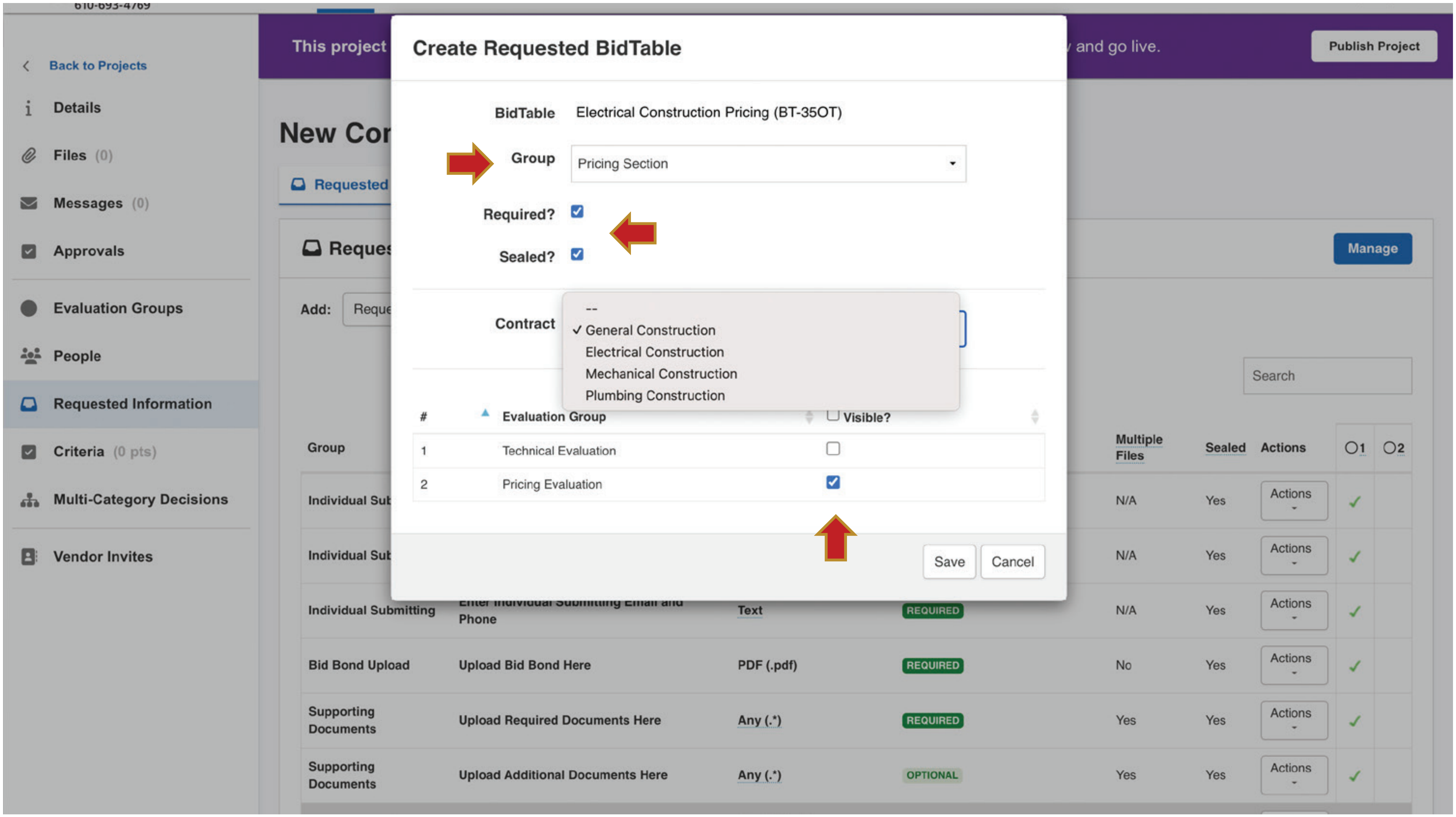
Click the **Actions** button next to each bid table, and select **Edit**.


Requested Information
Criteria (0 pts)
Multi-Category Decisions
Vendor Invites

Group	Title	Type	Requirement	Multiple Files	Sealed	Actions	1	2
Individual Submitting	Enter Individual Submitting First and Last Name	Text	REQUIRED	N/A	Yes	Actions	✓	
Individual Submitting	Enter Individual Submitting Title	Text	REQUIRED	N/A	Yes	Actions	✓	
Individual Submitting	Enter Individual Submitting Email and Phone	Text	REQUIRED	N/A	Yes	Actions	✓	
Bid Bond Upload	Upload Bid Bond Here	PDF (.pdf)	REQUIRED	No	Yes	Actions	✓	
Supporting Documents	Upload Required Documents Here	Any (.*)	REQUIRED	Yes	Yes	Actions	✓	
Supporting Documents	Upload Additional Documents Here	Any (.*)	OPTIONAL	Yes	Yes	Actions	✓	
Acknowledgements	Bidder Acknowledgements (Q-68IV)	Excel (.xlsx) Questionnaire	REQUIRED	N/A	Yes	Actions		
N/A	↳ 1 - Acknowledgements	N/A		N/A	N/A		✓	
Pricing Section	Electrical Construction Pricing (BT-35OT)	Excel (.xlsx) BidTable	REQUIRED EC	N/A	Yes	Actions		✓
Pricing Section	General Construction Pricing (BT-27MS)	Excel (.xlsx) BidTable	REQUIRED GENERAL CONSTRUCTION	N/A		Edit Delete		✓
Pricing Section	Mechanical Construction Pricing (BT-47LP)	Excel (.xlsx) BidTable	REQUIRED MC	N/A	Yes	Actions		✓
Pricing Section	Plumbing Construction Pricing (BT-34BS)	Excel (.xlsx) BidTable	REQUIRED PC	N/A	Yes	Actions		✓

Make sure each **BidTable** is matched to the correct **Contract** in the drop-down menu. Verify that all BidTables are assigned to the **Pricing Section** Group, and is marked as **Required** and **Sealed**.

Check the **Visible** column to **Evaluation Group #2 - Pricing Evaluation**.



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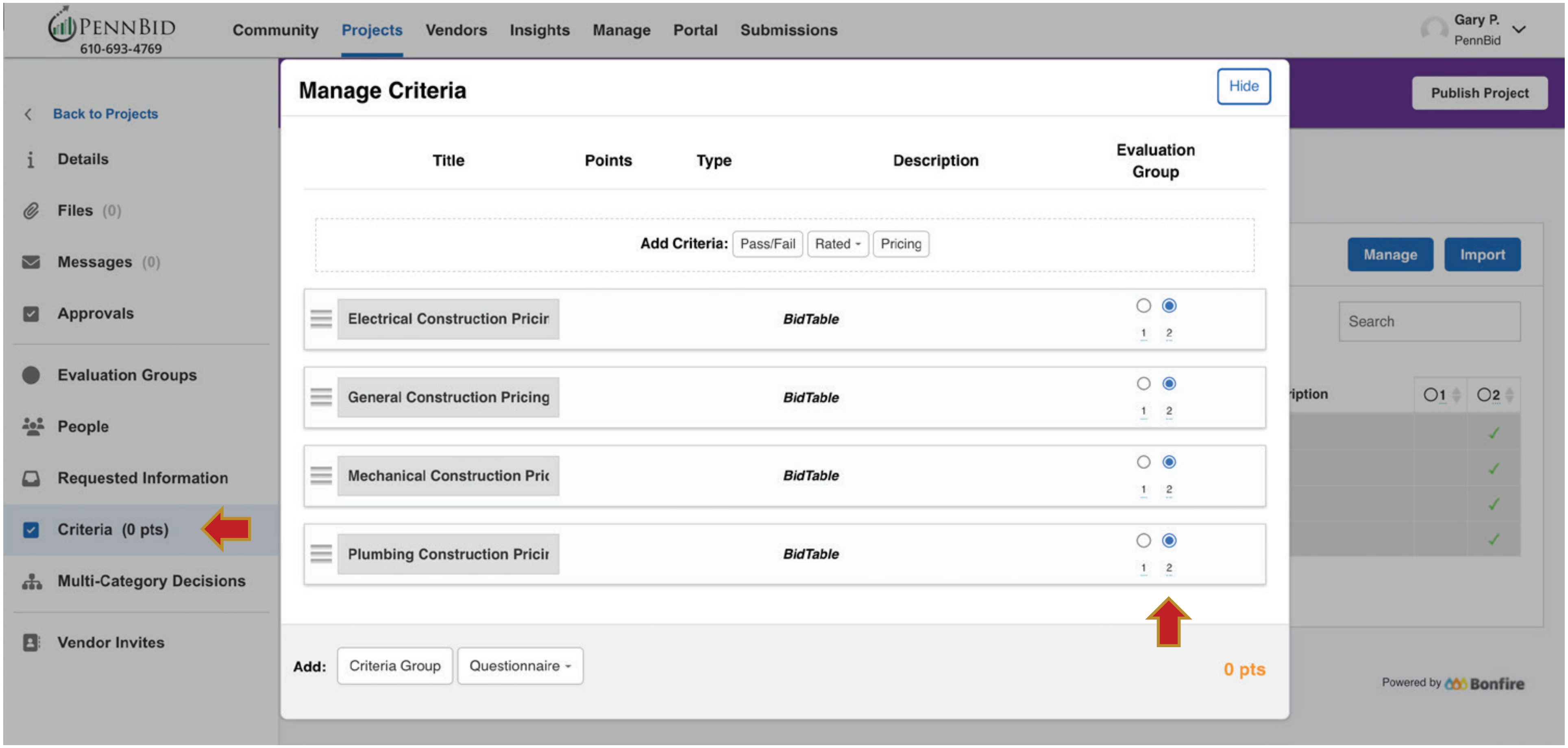
Select the **Criteria** tab and confirm that all **BidTables** are set to **Evaluation Group 2**.

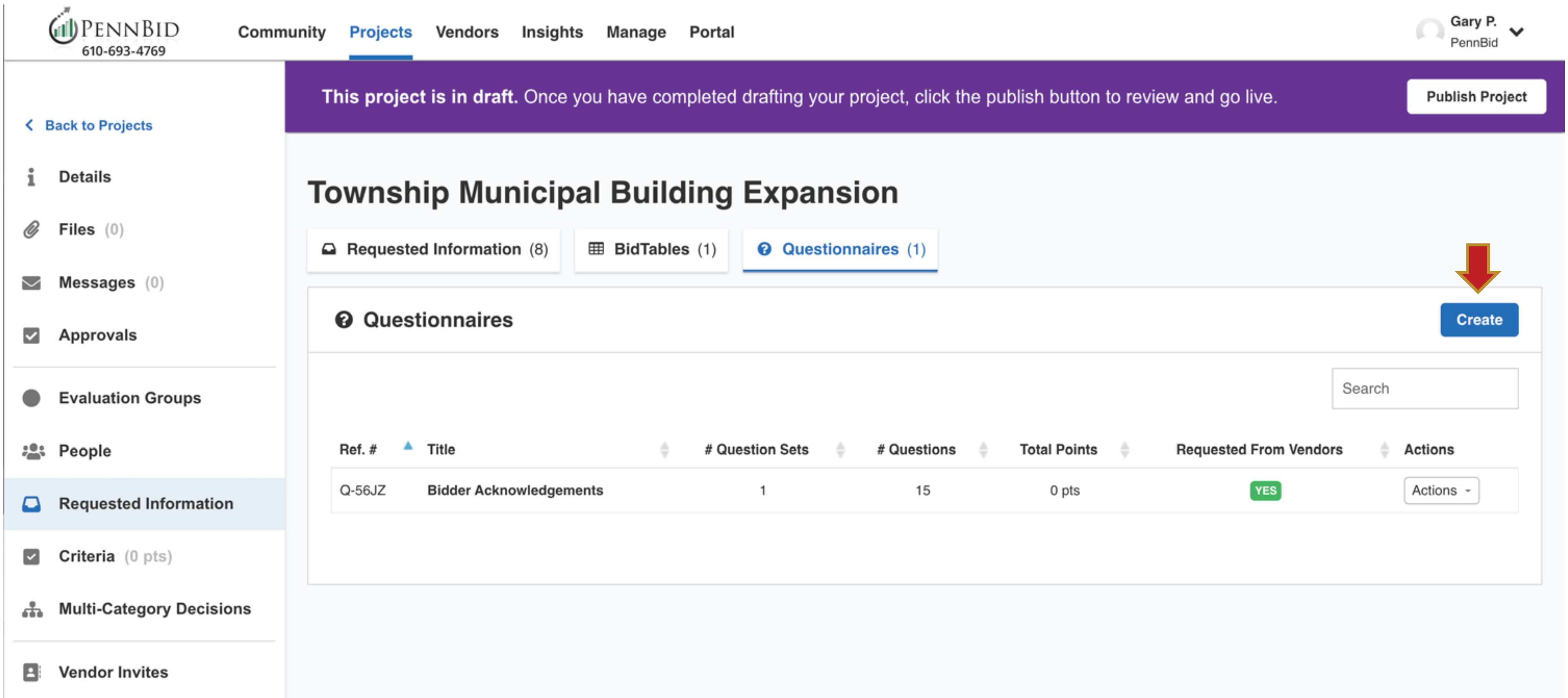


Questionnaires Tab

The bidder acknowledgments or **Questionnaires** related to your project are set up here.

To create a new **Questionnaire**, click the **Create** button on the right side of the screen.

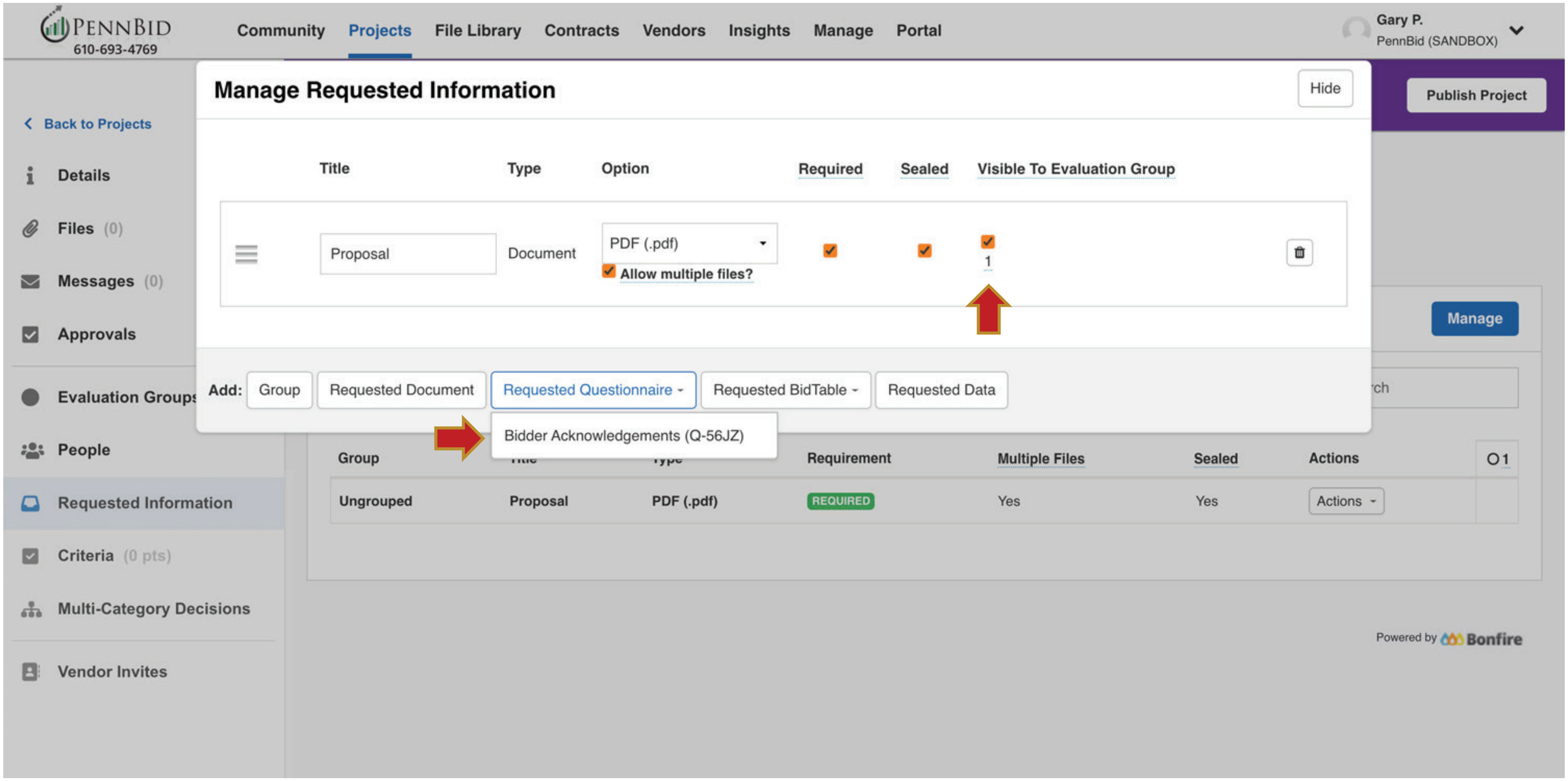
For additional information about creating a Questionnaire, download our “[Creating A Questionnaire]” guide.



Map your final **Questionnaire** to your project by returning to the **Requested Information** tab. First, click the **Manage** button on the right. Then, at the bottom of the pop-up screen click the **Requested Questionnaire** button and select the **Questionnaire**.

Notice: Make sure to **check** the box to make the Questionnaire **Visible To Evaluation Group**.

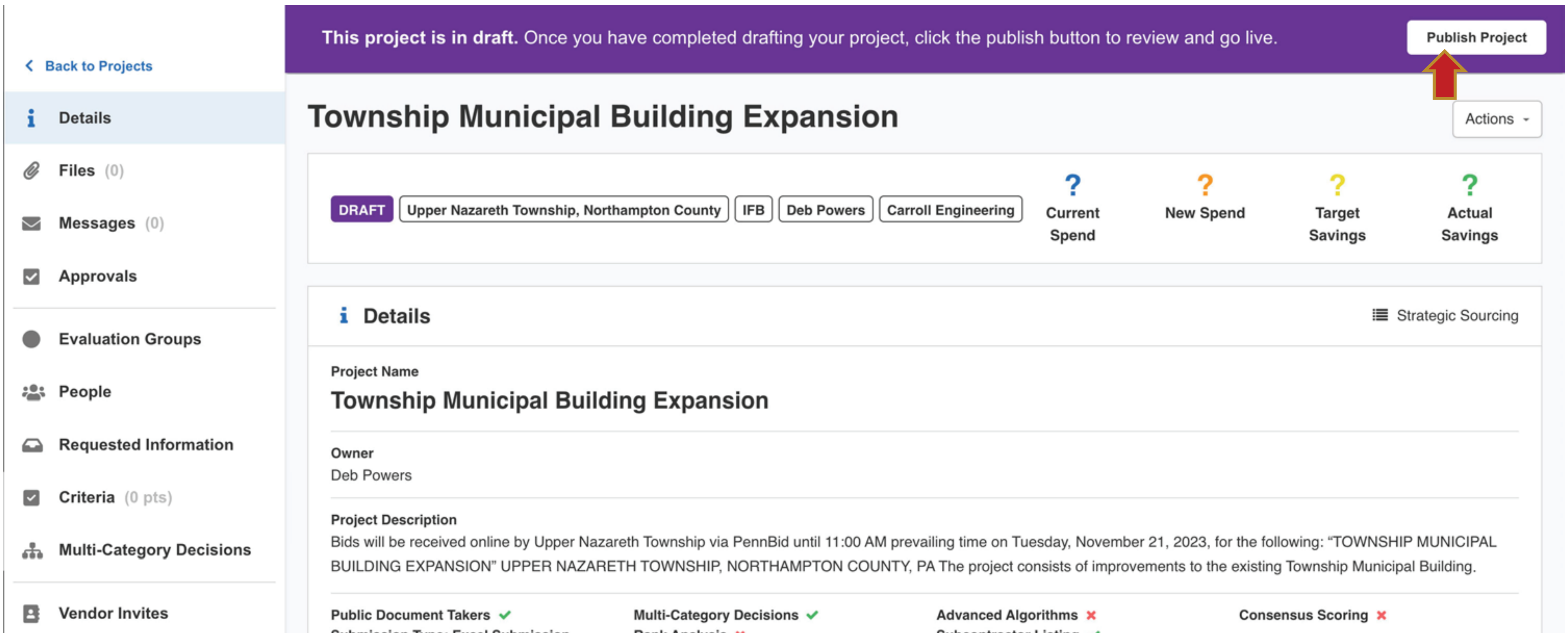
After adding the **Questionnaire** to the **Manage Requested Information** screen, simply drag the **Questionnaire** to the correct Requested Information Group using the three (3) lines to the left of the **Questionnaire Title**.



Getting Ready to Go Live

Now that the project information has been reviewed and documents have been uploaded, the final step is to head back to the **Details** section to **Publish** your project. At the top of the **Details** screen in a purple banner, you simply click the **Publish Project** button. This will allow your project to "go live" on the **Open Date** specified in your project setup.

> ***Notice:*** *If the published button is NOT CLICKED, the project* ***will not go live regardless of the scheduled date and time****.*
> *Once a project has been published, it cannot be unpublished.*



Should you have any questions or require assistance, please contact PennBid at info@pennbid.net, or **610-693-4769**.