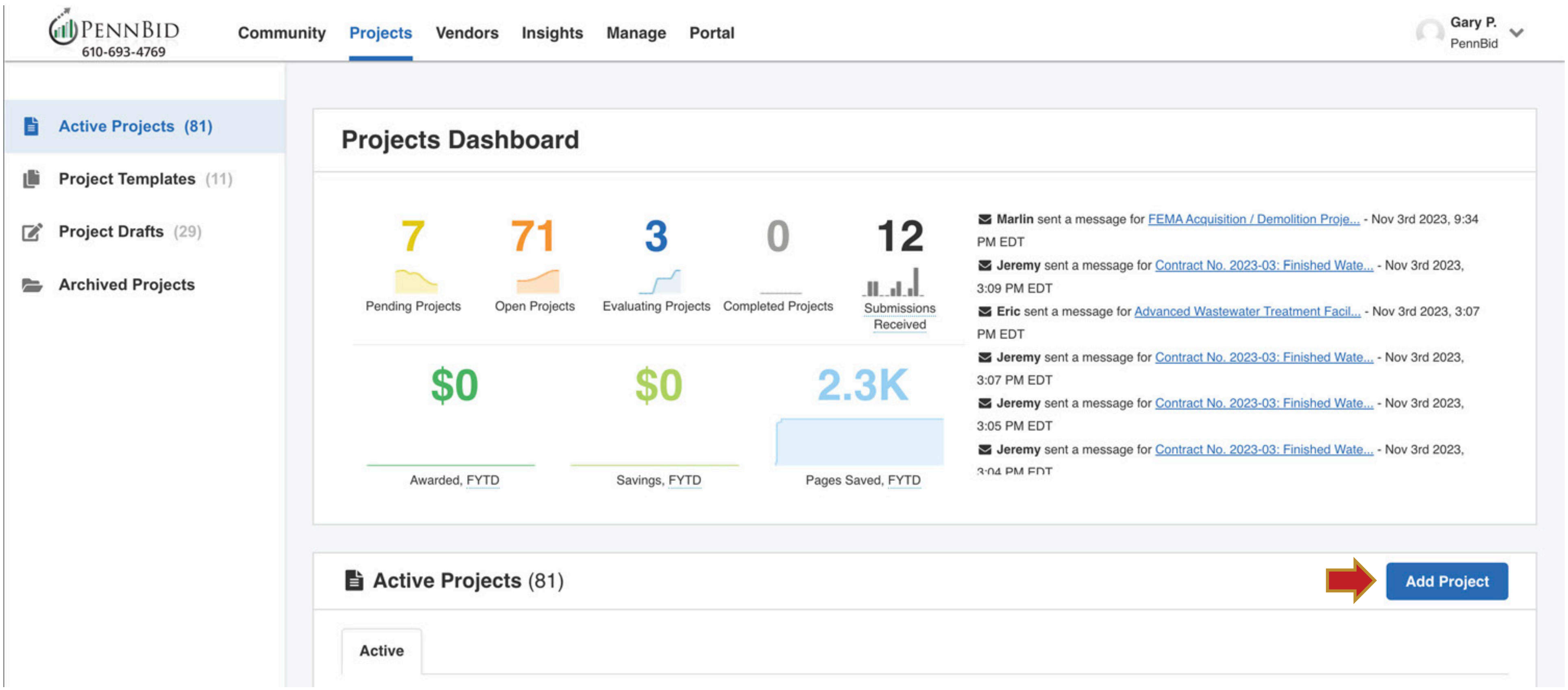
New Project Setup (Single Contract Projects)

New Project Setup – The process of setting up a single-contract solicitation in the PennBid platform from start to finish.

Creating A Draft Project – Getting Started

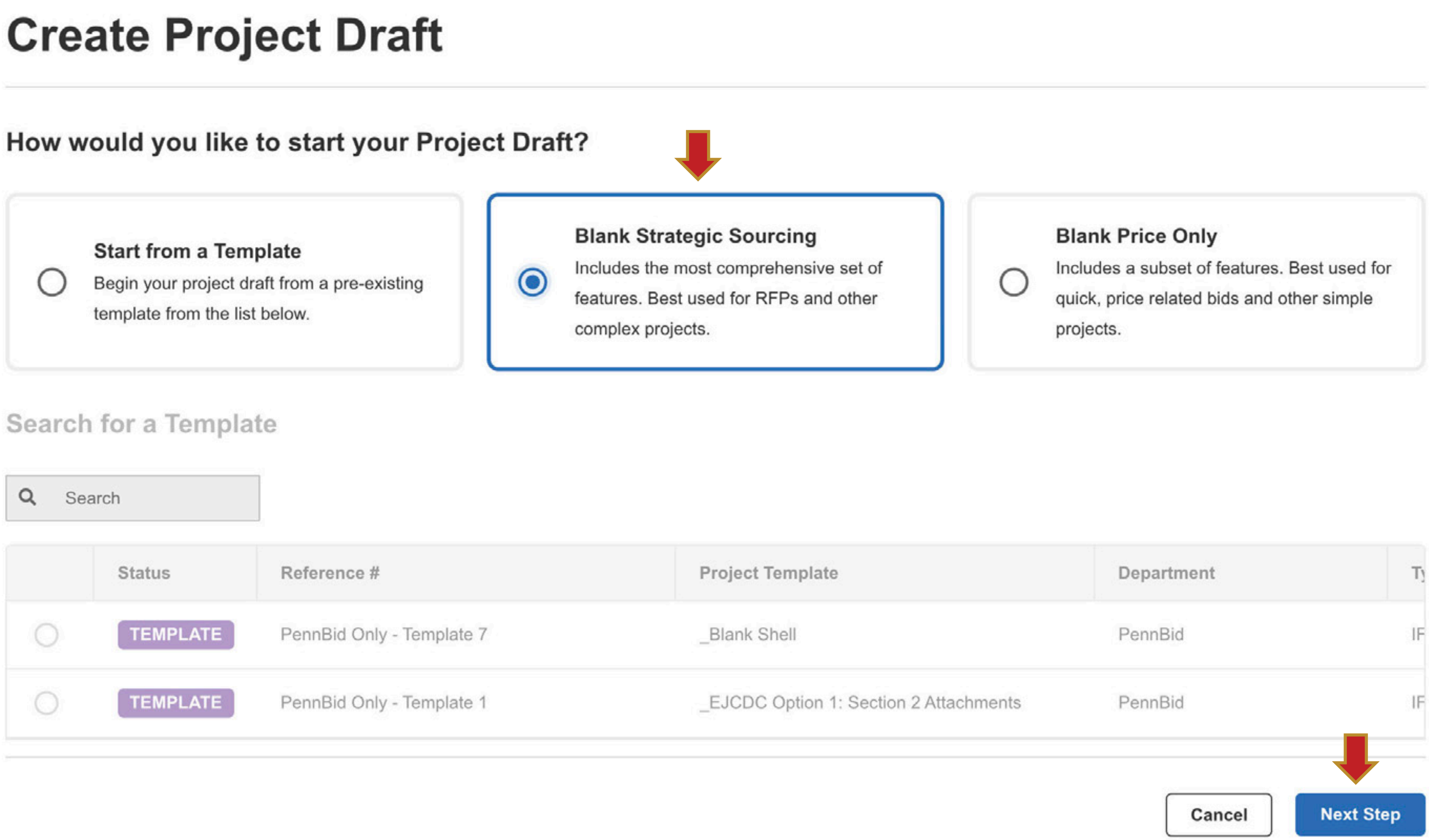
When you login to PennBid, you land on the **Projects** page. From the **Active Project** section, click the **Add Project** button to begin.



Create Project Draft

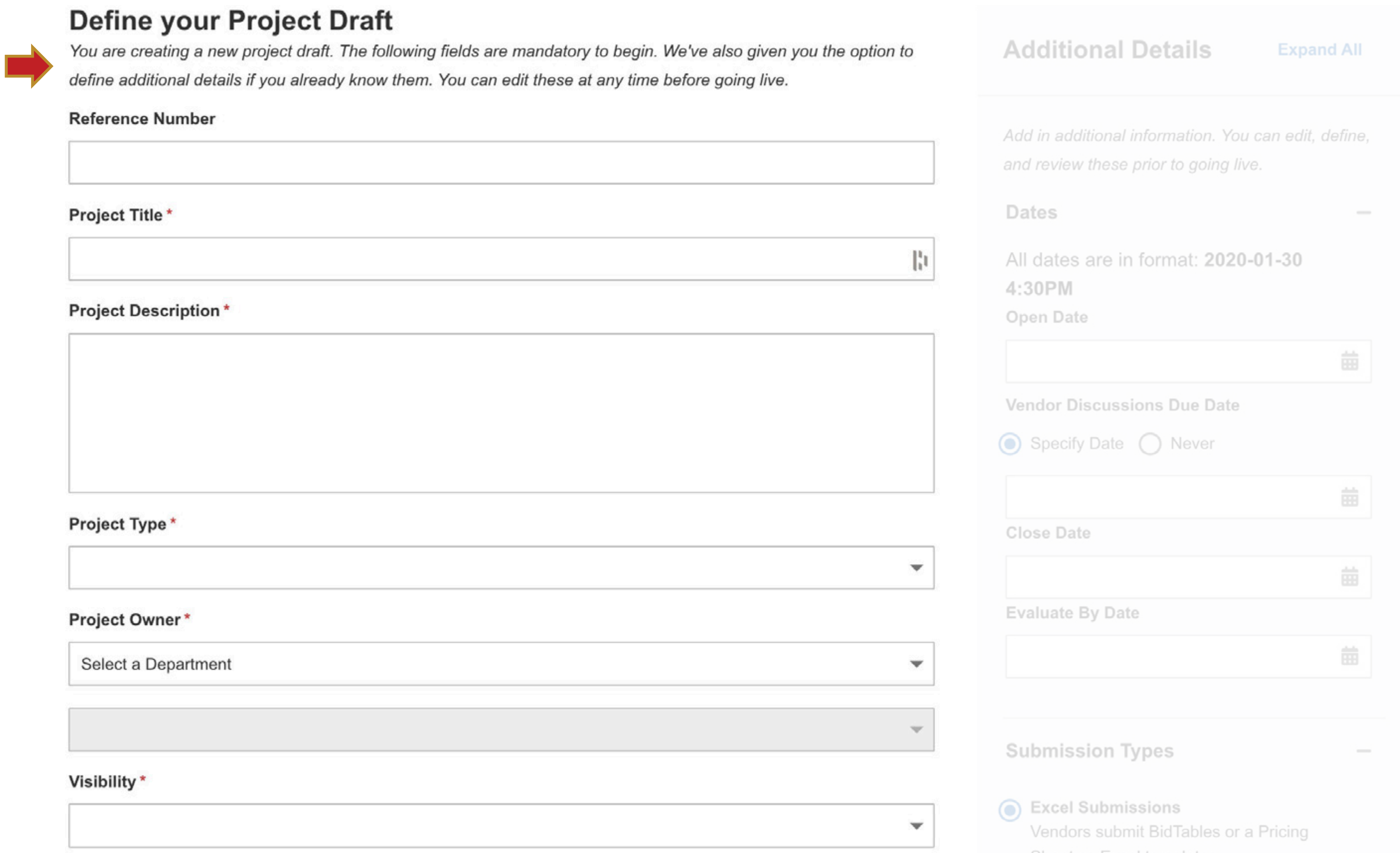
Select the **Blank Strategic Sourcing** option and then click the **Next Step** button at the bottom of the screen.

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



Define your Project Draft

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



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Additional Details

Dates:

- Open Date
- Close Date
- Vendor Discussion Due Date - cut off date/ time for bidders to submit questions
- Evaluate By Date - targeted bid review completion date

Submission Types:

- Excel Submissions (keep as default)

Configurations (select the following two):

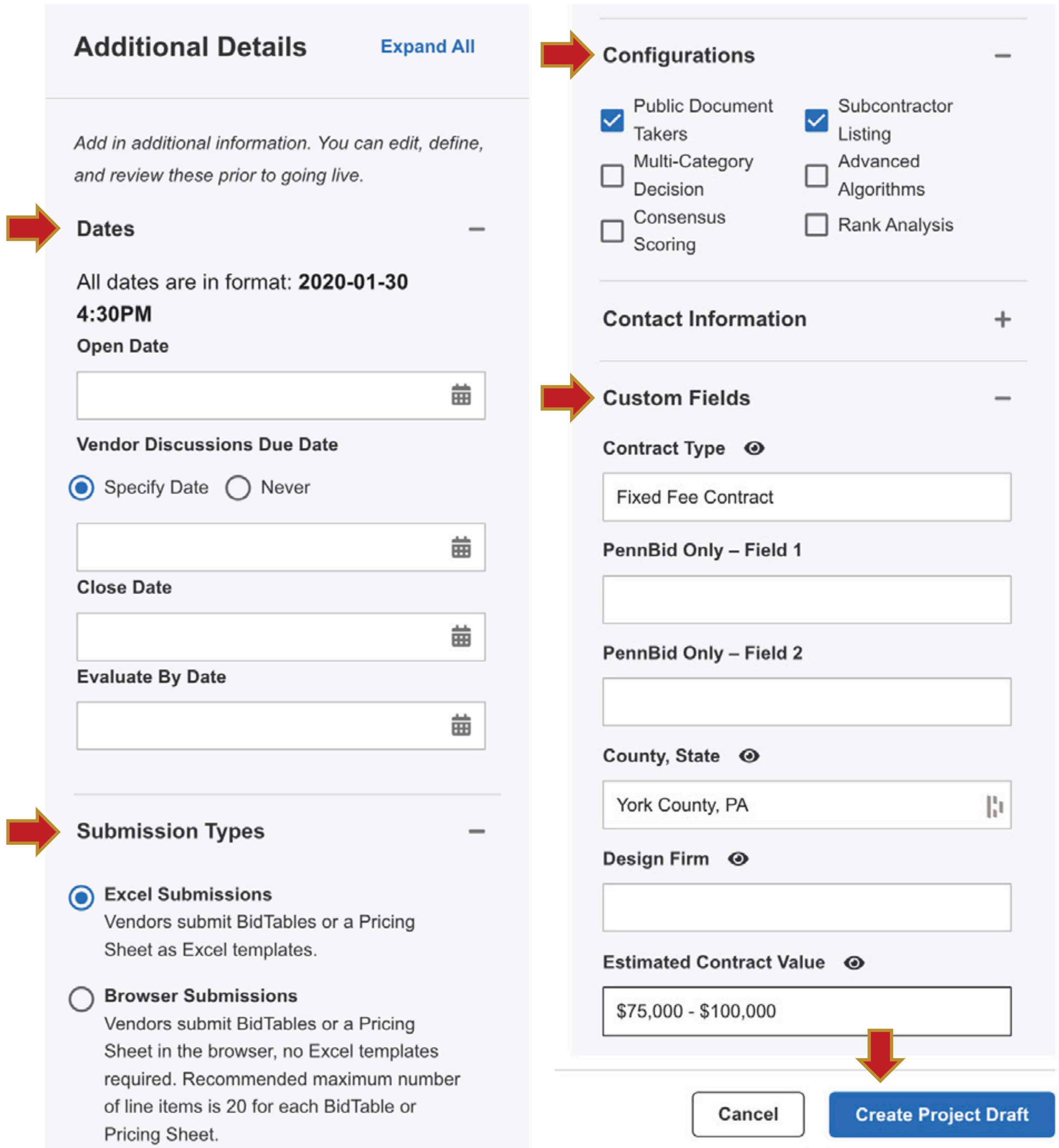
- Public Document Takers
- Subcontrator Listing

Contact Information:
You have the option to display the project owner's Contact Information. The default setting is hidden.

Custom Fields:

- Contract Type please enter either:
  - Fixed Fee Contract
  - Term Contract
  - Quote (less than public bid threshold)
- County, State
- Estimated Contract value (if desired)

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



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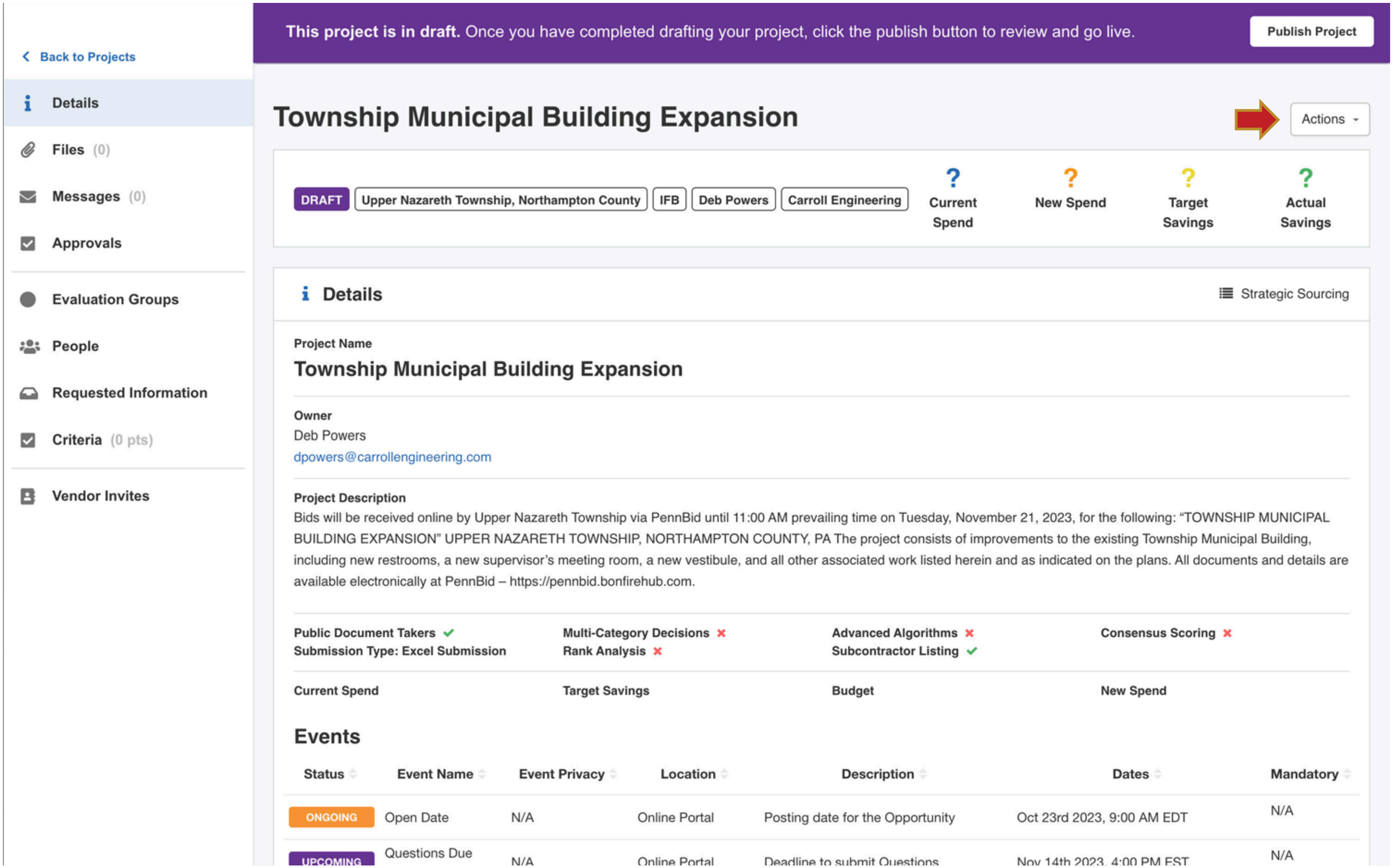
After clicking the **Create Project Draft** button, you will proceed to the Details screen where you can review the information entered. Edits can be made to the **Project Details** by clicking the **Actions** button in the upper right corner.



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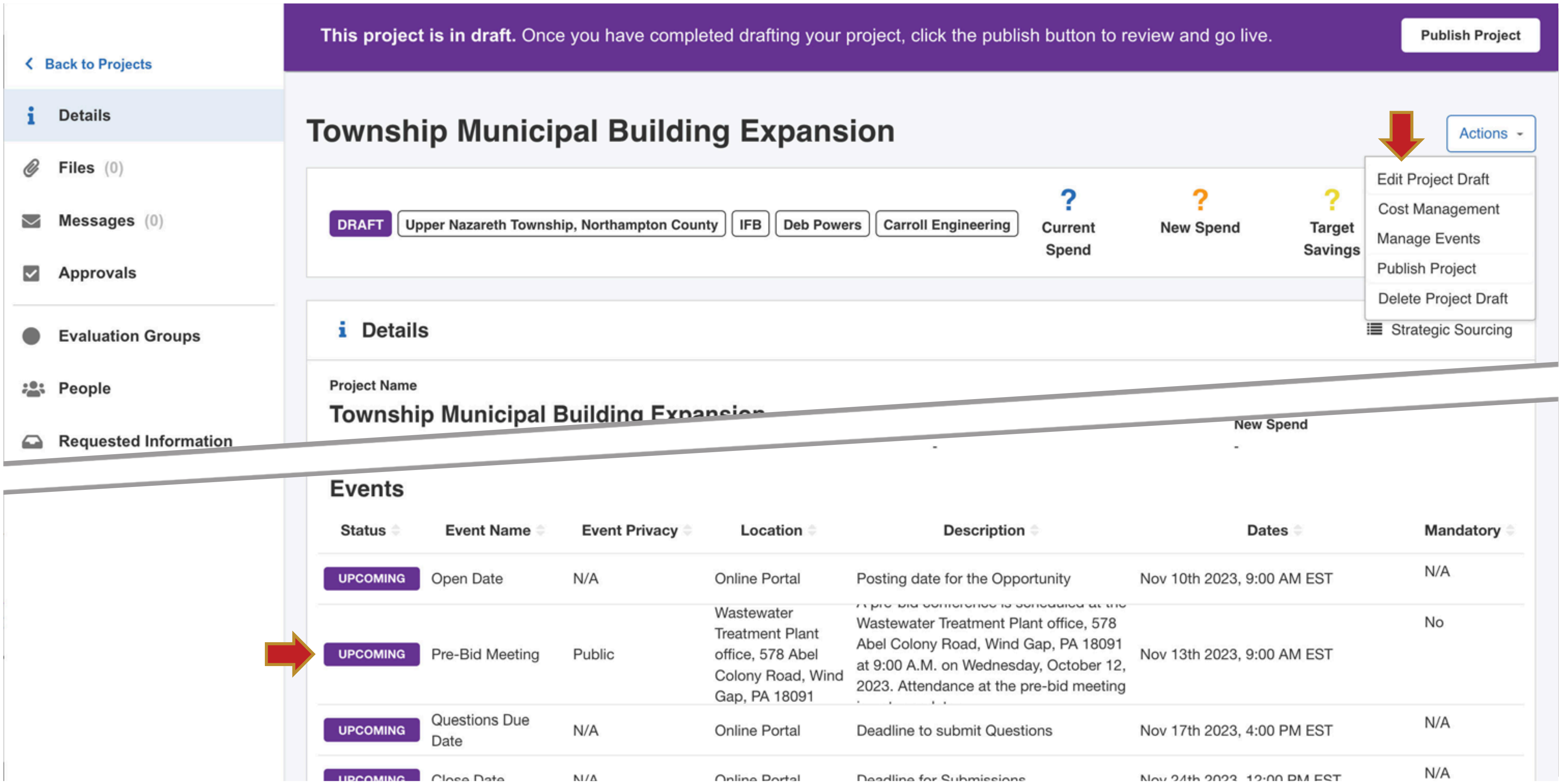
Select **Edit Project Draft** to make event detail changes.

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



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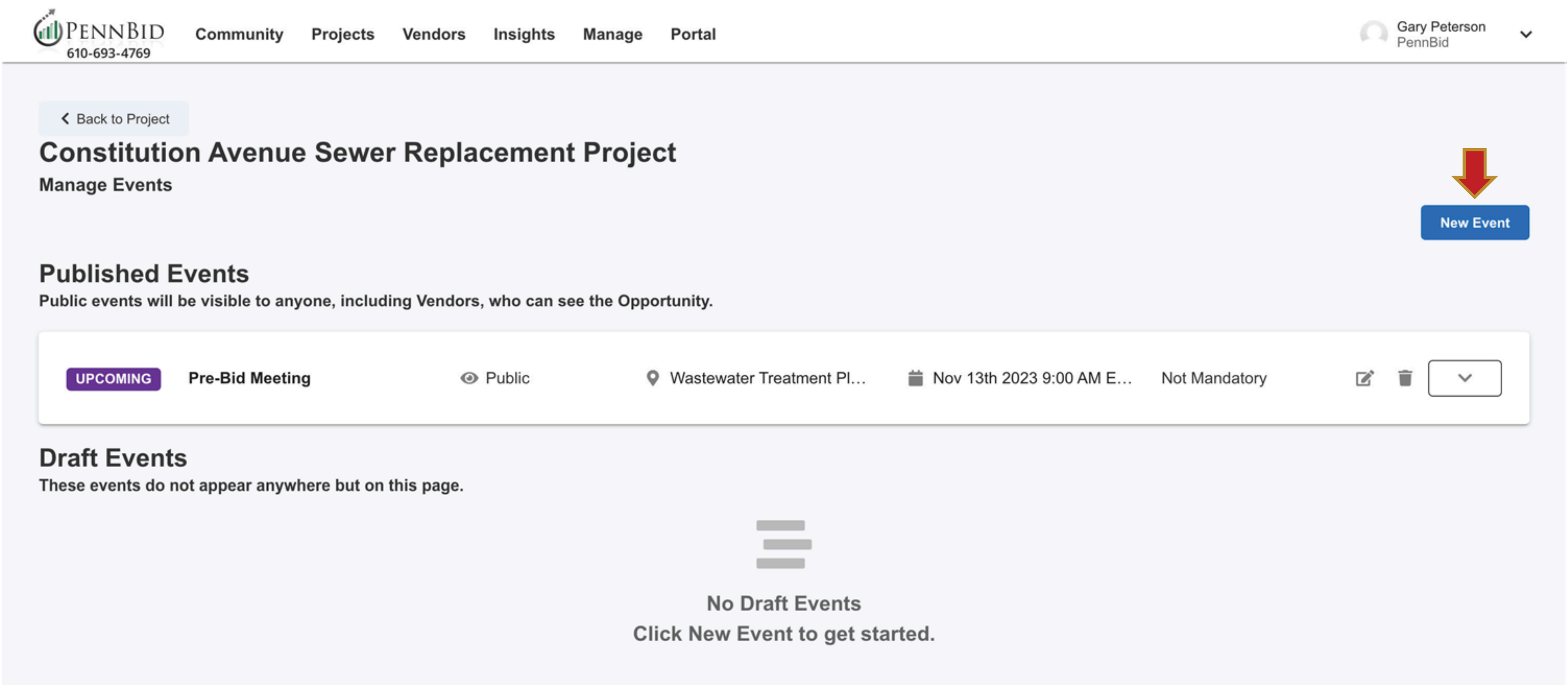
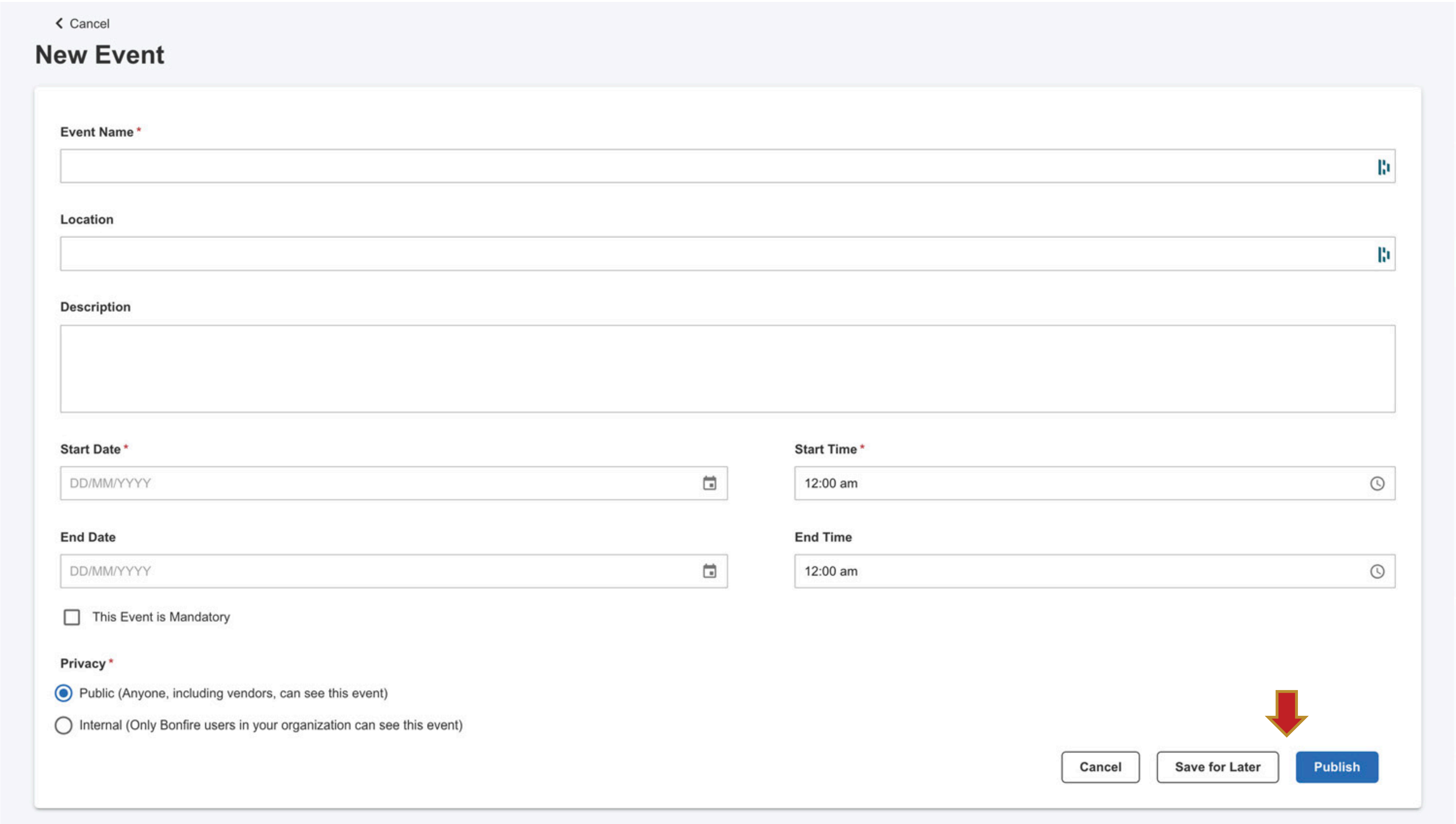
Click the **New Event** button to add an **Event**.



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. Select the **Save for Later** button to save the event as a **Draft Event**.



Files Section

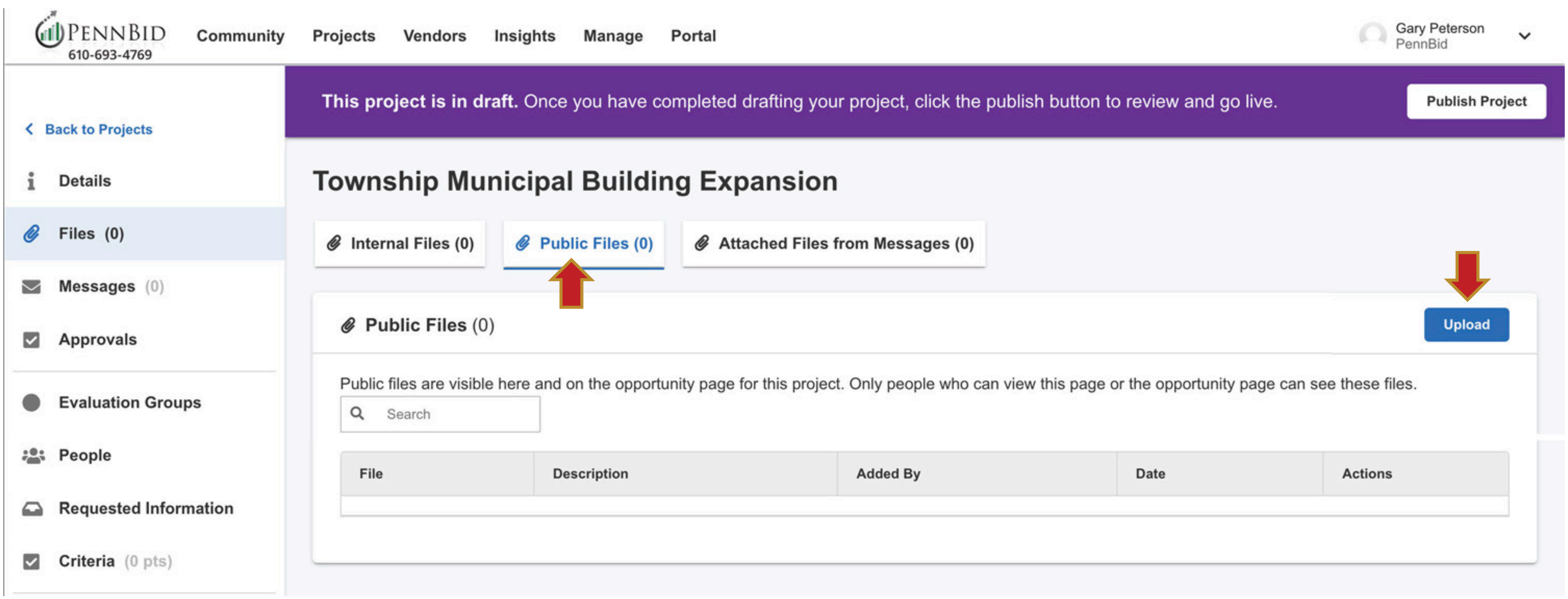
Select the **Files** section. You will upload all final versions of project documents here to be available to bidders to download. This includes, but is not limited to: the advertisement, plans, specs, instructions to bidders, blank required documents for bidders to fill out, etc.

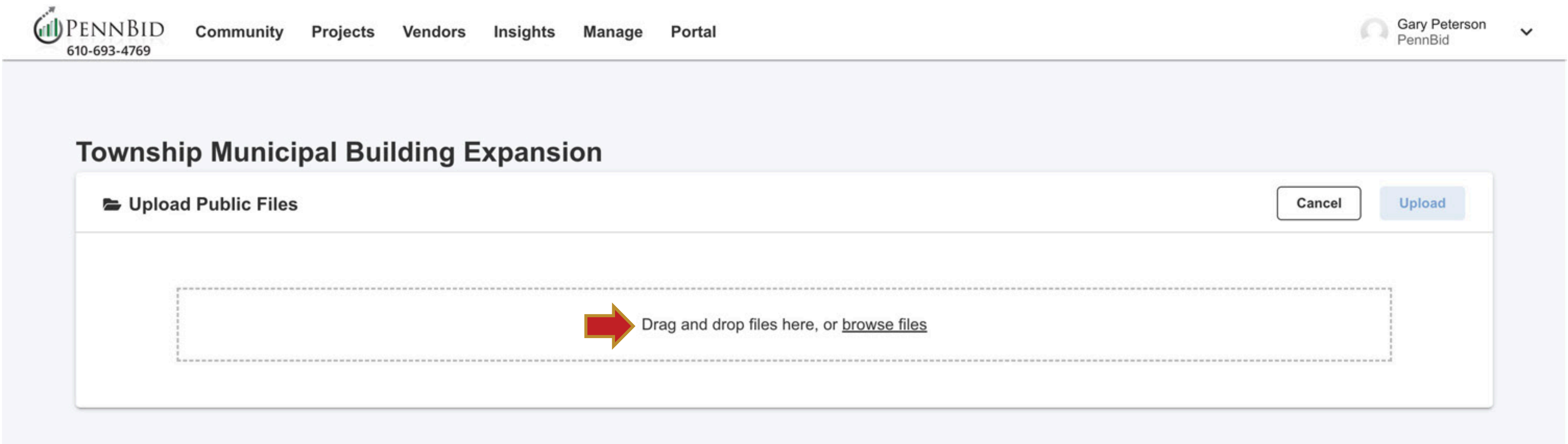
Note: We recommend uploading regular documents in PDF format, as these can't be altered in any way.

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.

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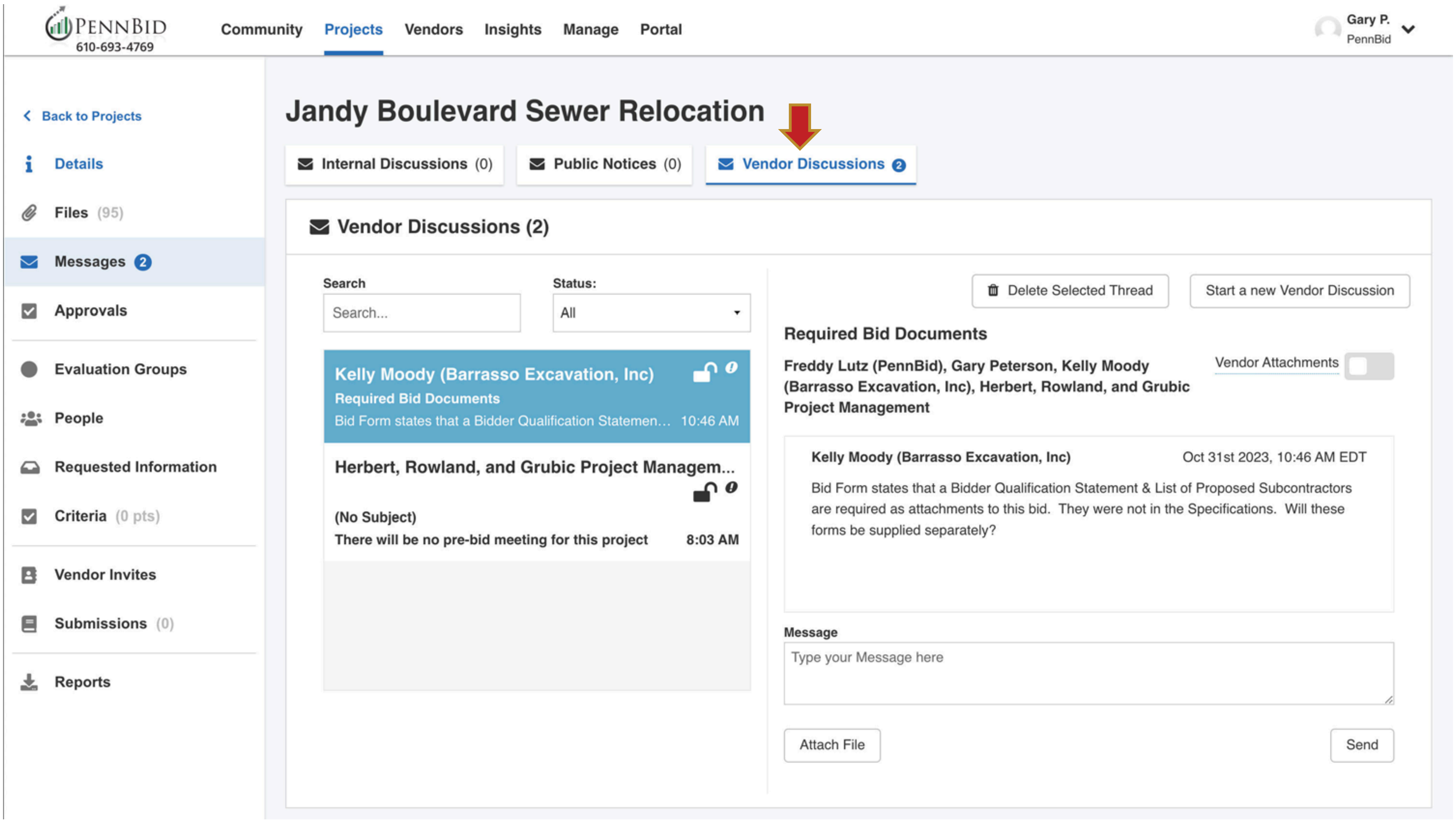
Community
Projects
Vendors
Insights
Manage
Portal
Gary Peterson
PennBid
Township Municipal Building Expansion
Upload Public Files
Cancel
Upload
Drag and drop files here, or browse files

Messages Section

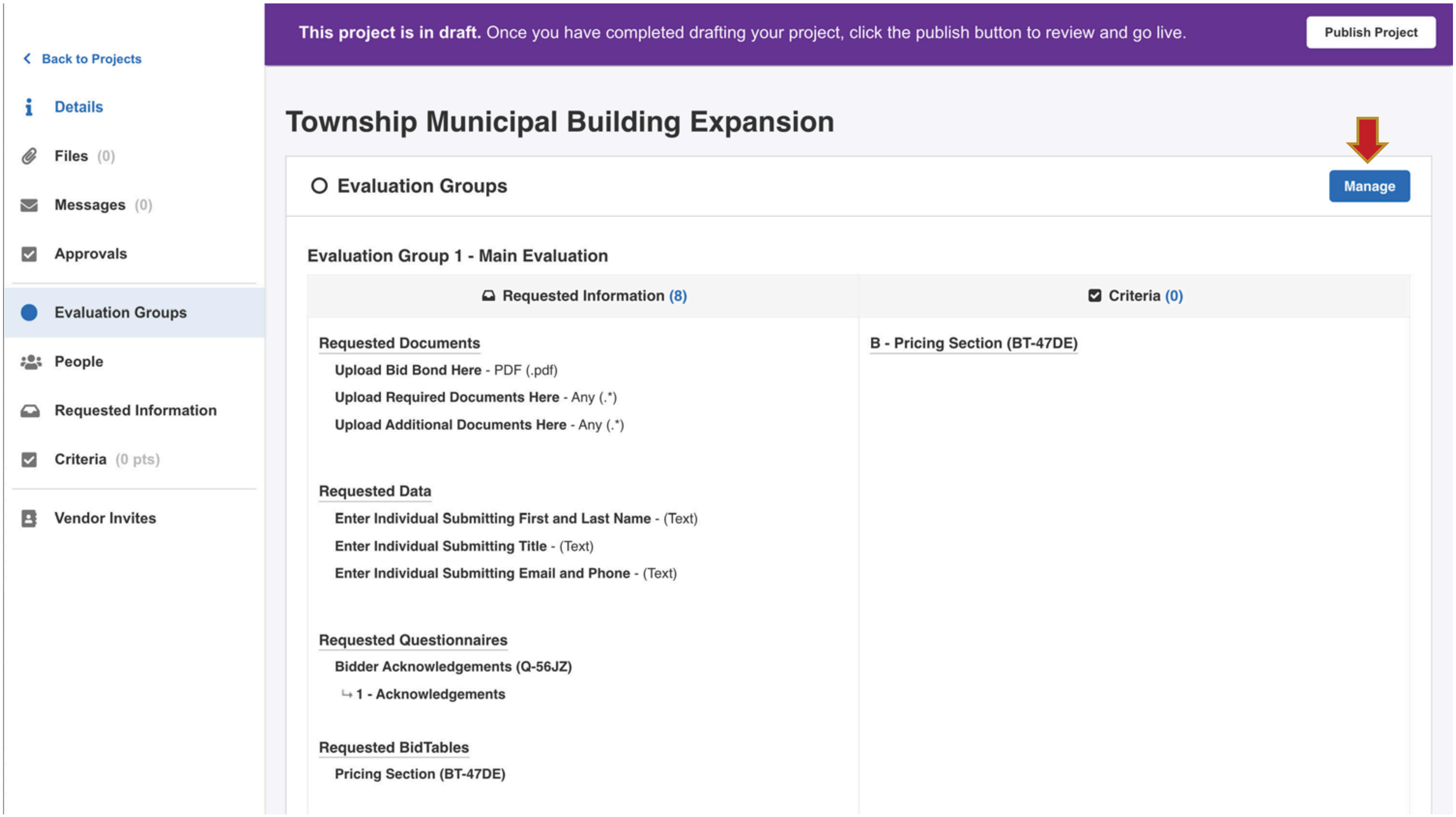
Communications with Vendors is managed within the **Messages** section. Vendor questions will be displayed in the **Vendor Discussions** tab. **Public Notices** can be published for bidders via the **Public Notices** tab, and **Internal Discussions** can be managed for private communications within you **Department Users**. For more information on **Vendor Discussions** see our "*Vendor Discussion Quick Start Guide*".



Evaluation Groups Section

Within a single contract project there will typically be a single **Evaluation Group**.

In the **Evaluation Group 1 - Main Evaluation** you see all items to be **Released** when a project is unsealed including: **Requested Documents**, **Requested Data**, and **Requested Questionnaires** and **Requested BidTables (Pricing Section)**.



People Section

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

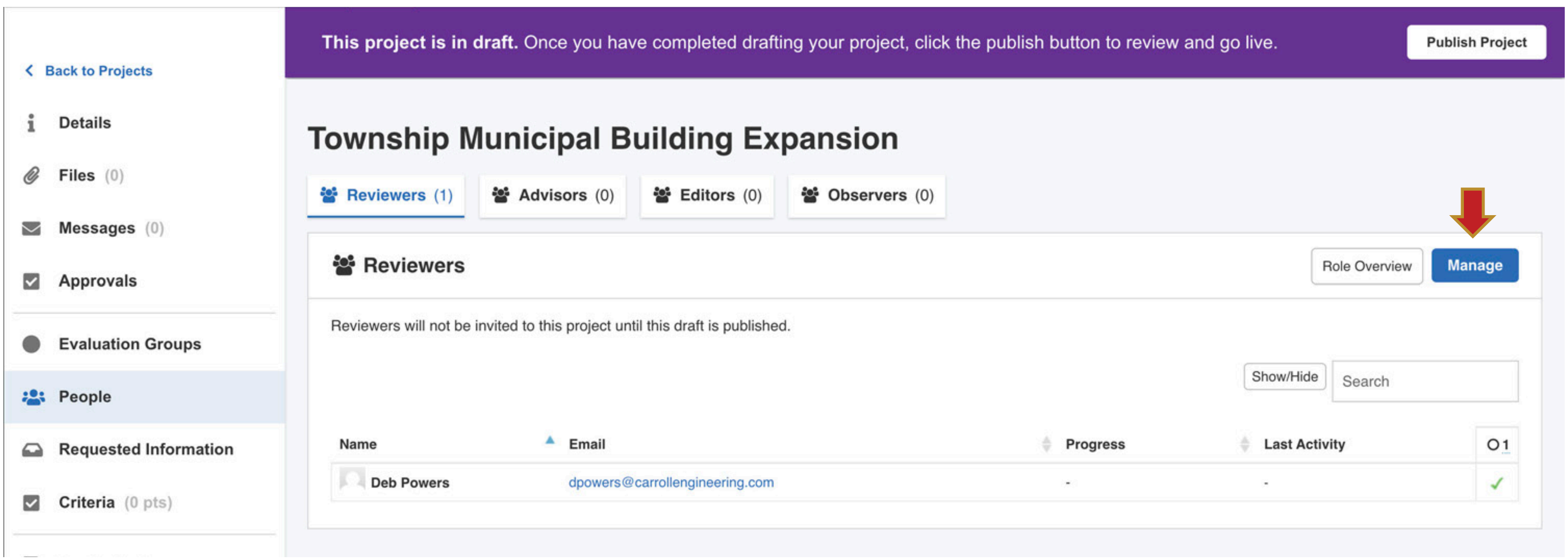
Reviewers* – Can view basic components of the project and is **required for anyone who is reviewing /evaluating submitted bids**, bid information, score criteria, and read documents assigned to their **Evaluation Groups**.
*This is the most commonly selected role and one **Reviewer must be included to Release** (or open) the bid.

Advisors – Have the same functions as reviewers but only with projects that they have been specifically invited to.

Editors – Can contribute to the setup of your Draft Project. After your project is Published, the Editor role is removed.

Observers – Can view all components of a project draft or a published project including all the scores. Project observer is a read-only role.

By clicking on the blue **Manage** button, you will be able to add **People** and assign their **Roles** to your project.



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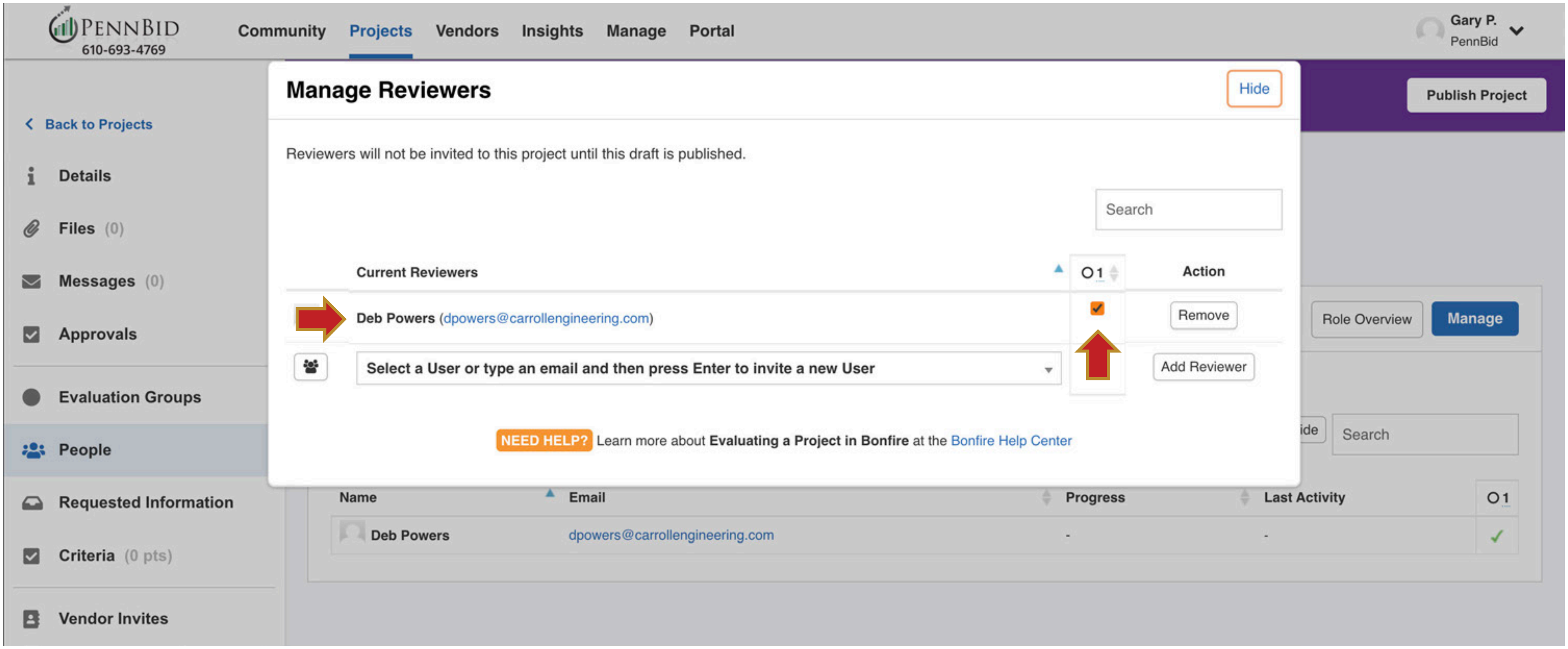
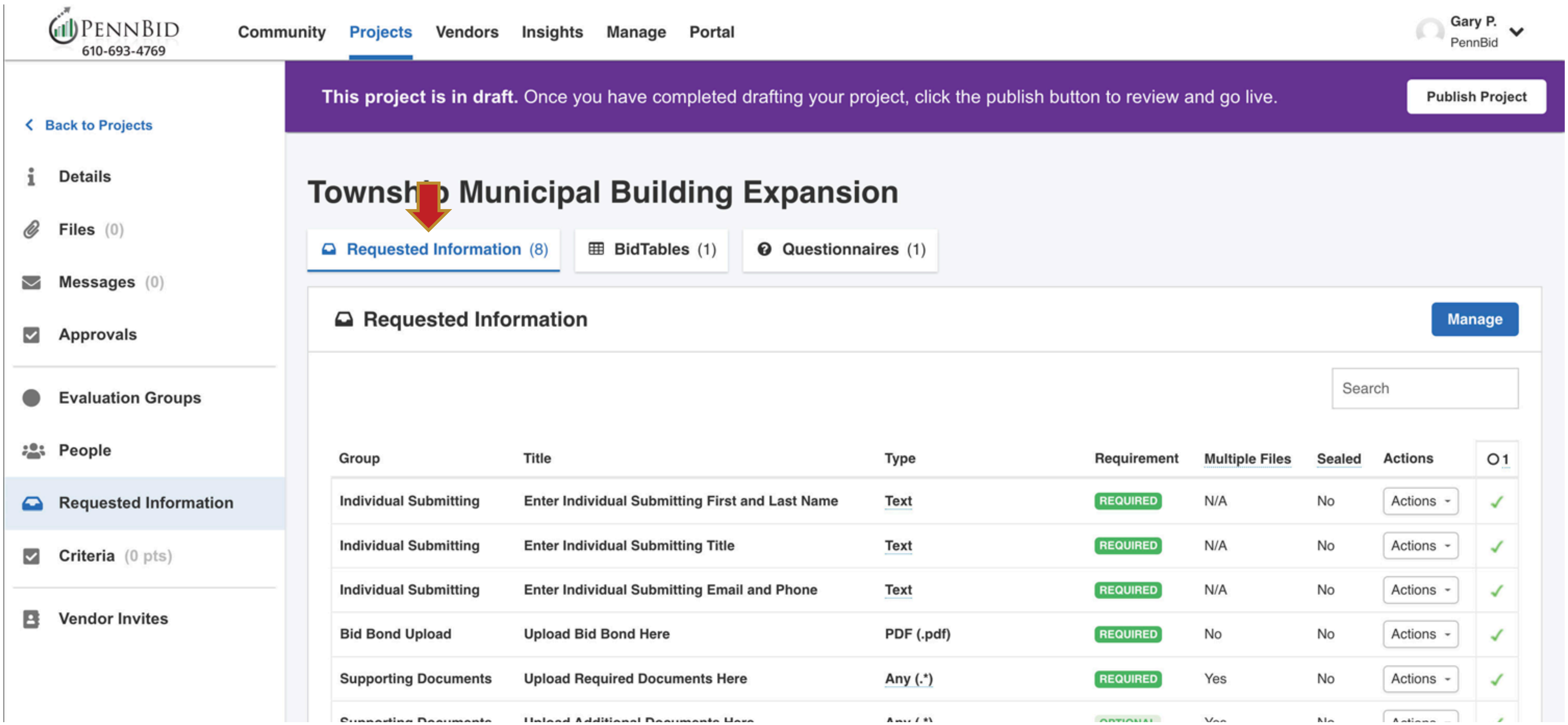
Make sure you select the correct **Evaluation Group** for every **Person** added.

It is important to make sure your **Reviewers** have all Evaluation Groups they require access to selected. If not, when a **Reviewer Releases** (or opens) a bid, they will not have access to the information submitted by bidders for that project.



Requested Information Section

Select the **Requested Information** section. There are 3 tabs here including **Requested Information**, **BidTables**, and **Questionnaires**. This screen outlines all the required information that bidders must complete their bid submission.



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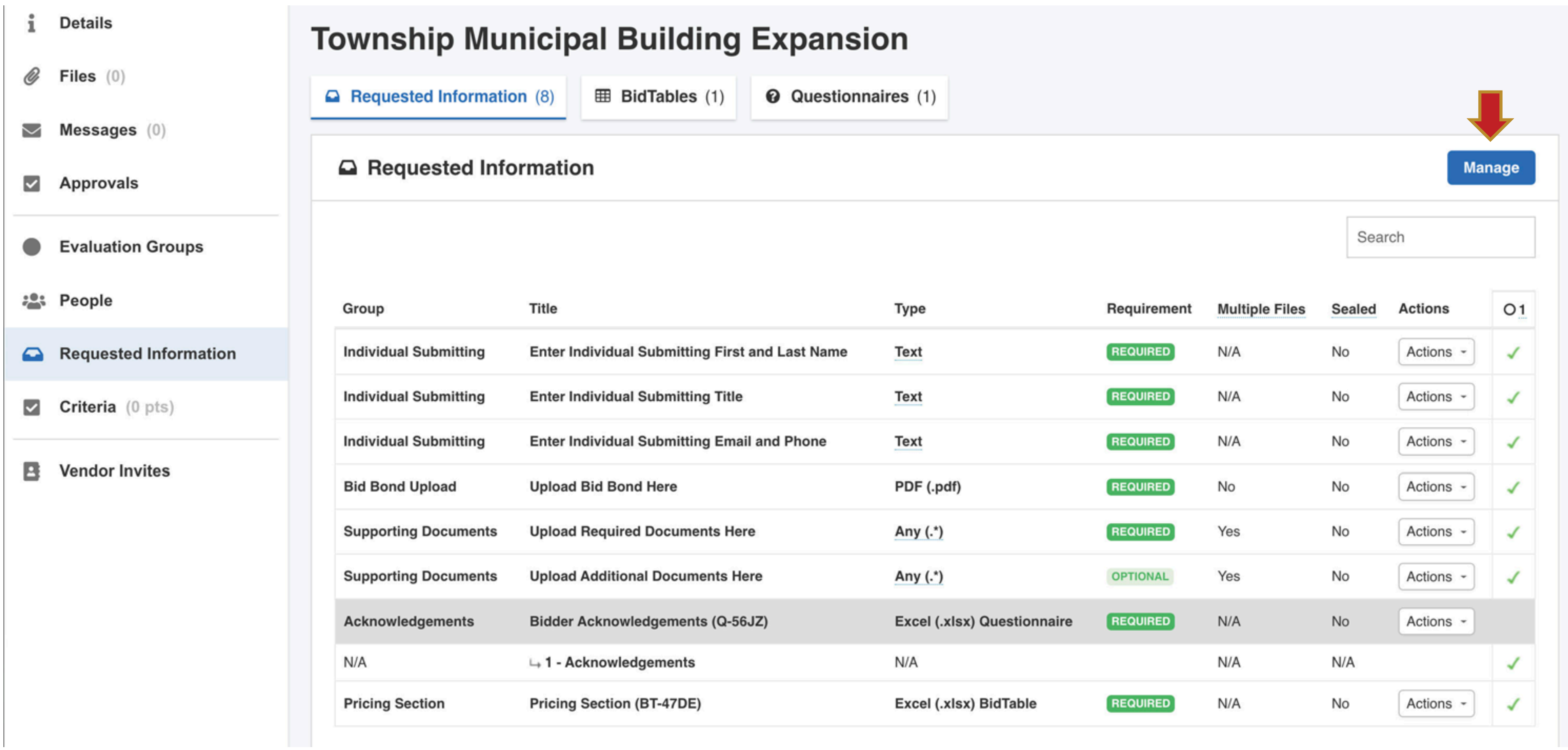
Requested Information Tab

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**. Make sure to set the Bid Bond Upload and Pricing Sectoimn

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



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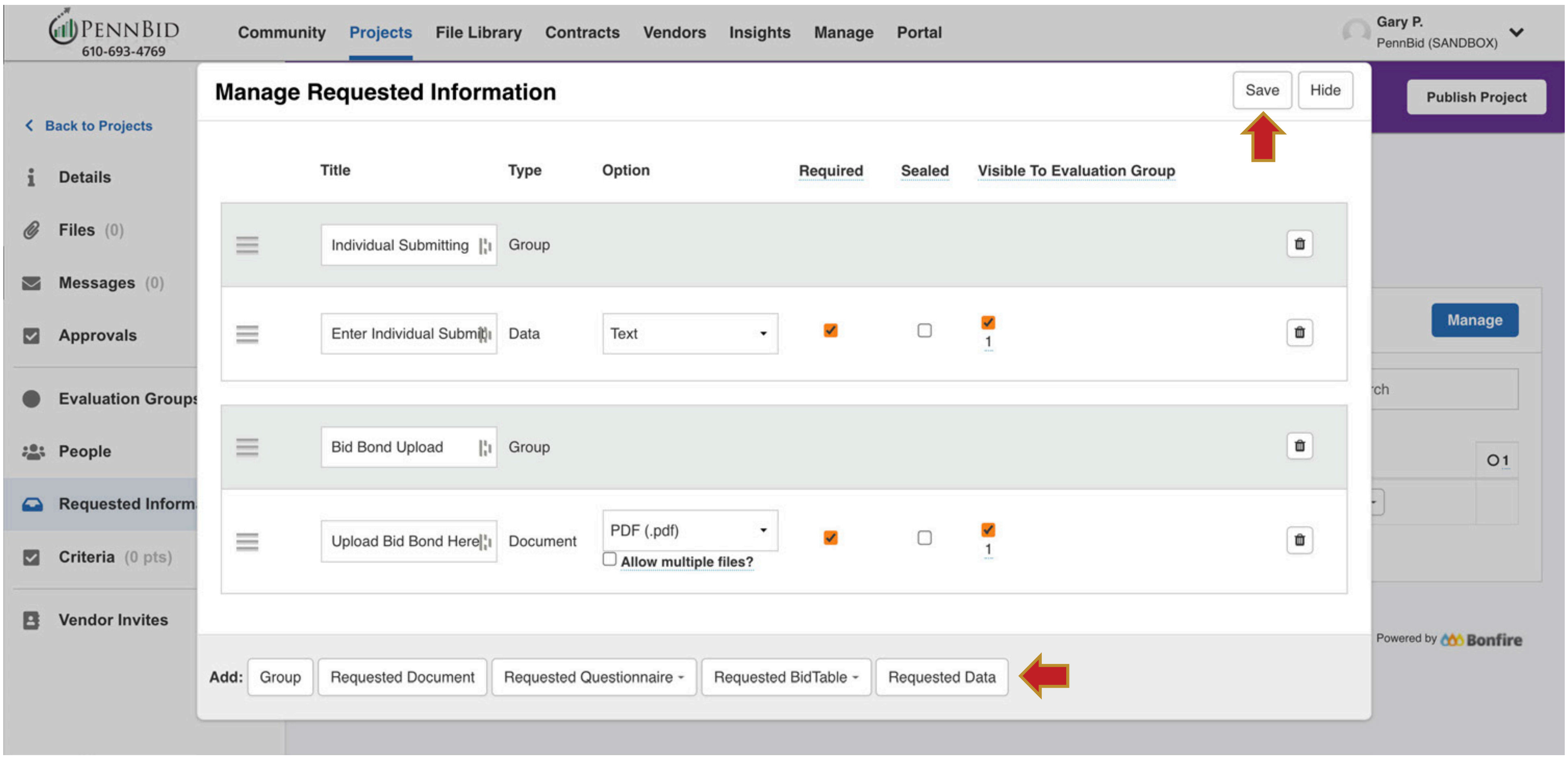
Click the **Manage** button to manage all **Requested Information** for your project.

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.

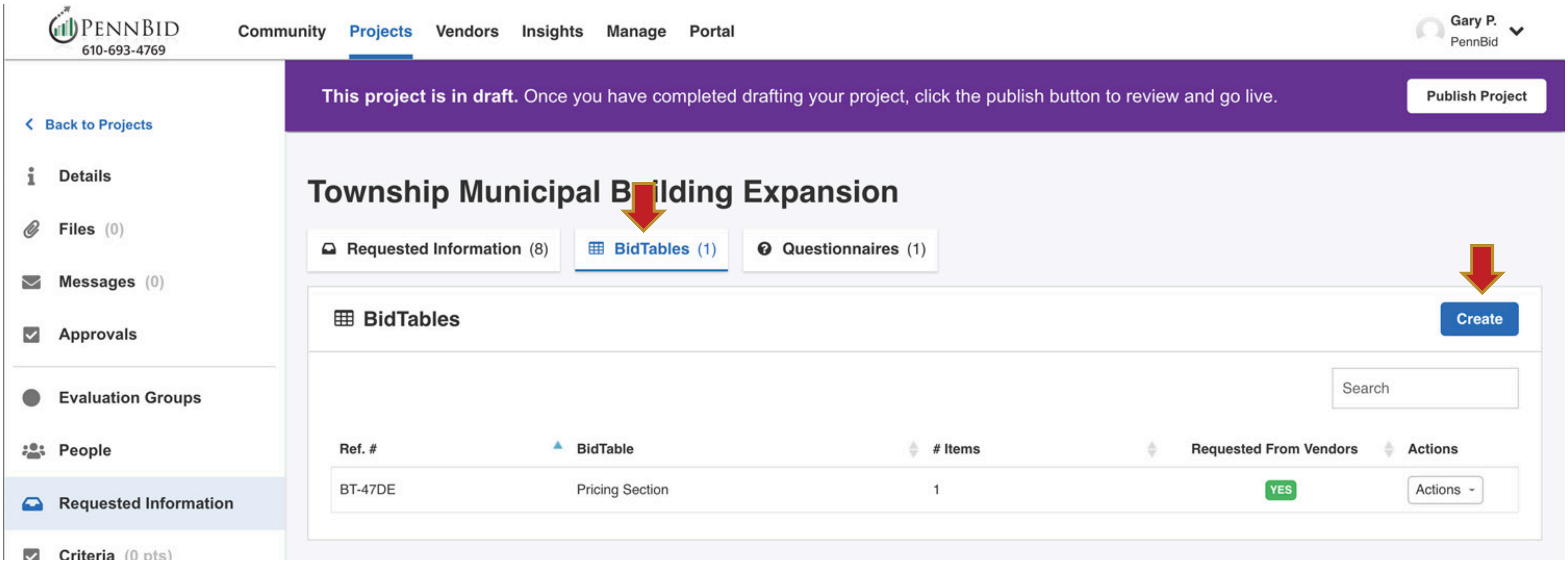
Group and Item order can be changed by clicking and dragging using the three bars on the left edge of the screen.



BidTables Tab

The pricing portion(s) or **BidTables** related to your project are set up here.

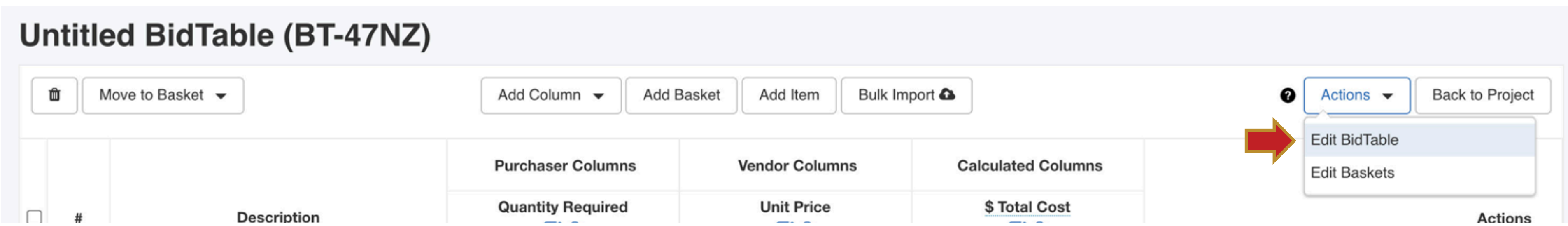
To create a new **BidTable**, click the **Create** button on the right side of the screen.

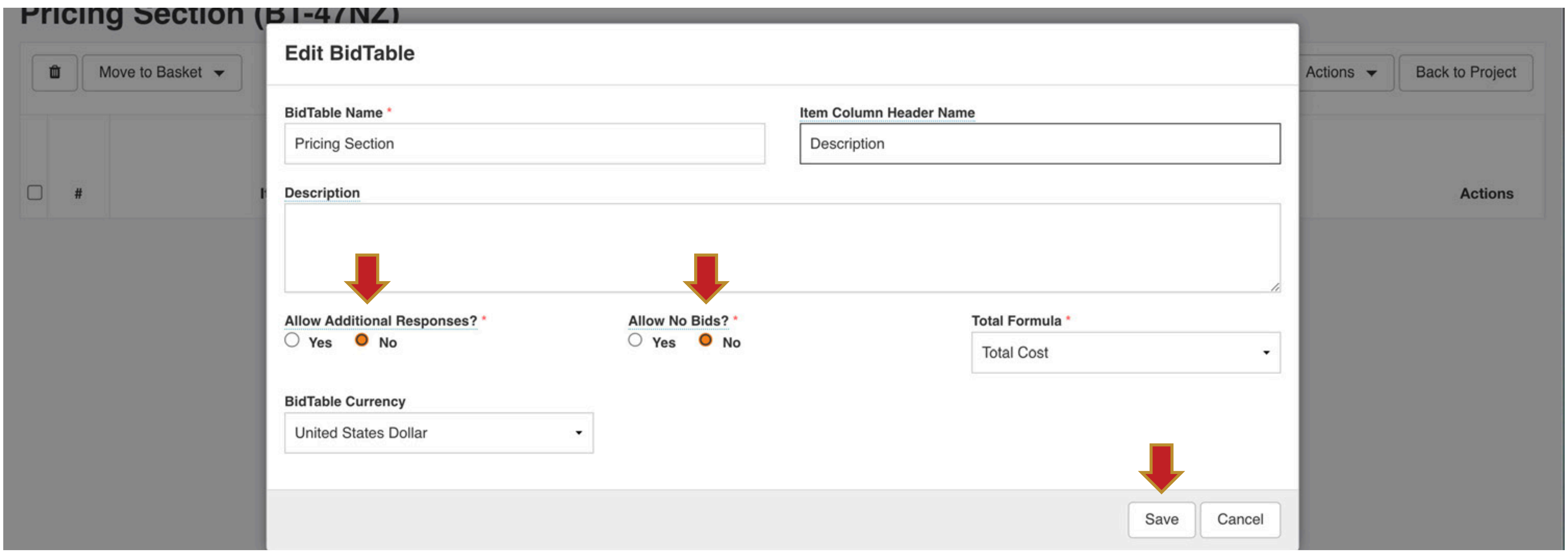


This creates a new "**Unititled BidTable**" with a Bonfire code in parenthesis (this allows the system to associate your BidTable with the correct project and cannot be changed).

Under the **Actions** button, select **Edit BidTable** and:

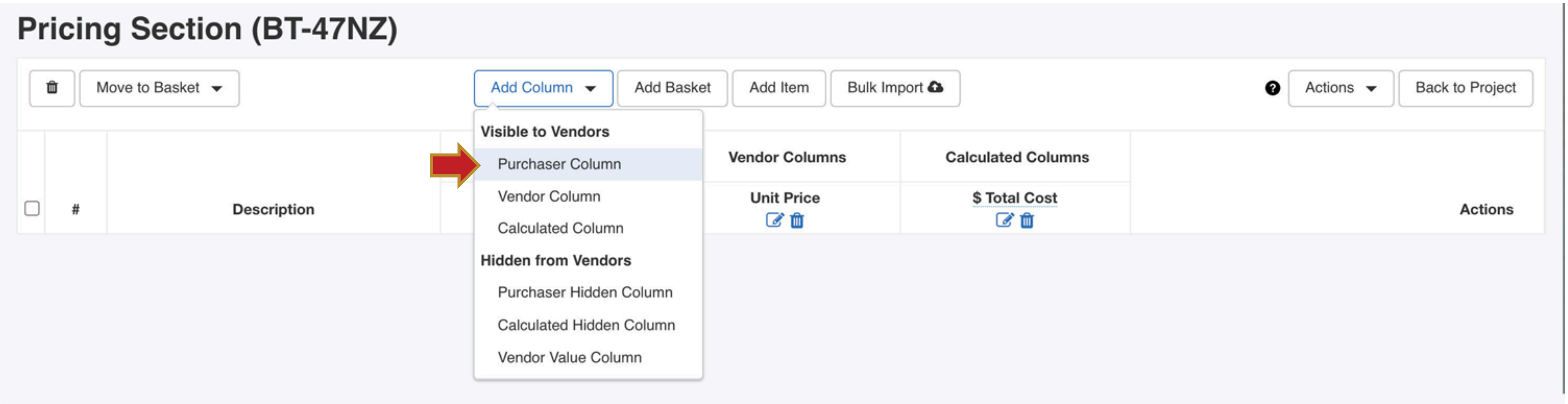
- Change the **BidTable Name** to "*Pricing Section*", change the **Item Column Header Name** to "*Description*"
- Change **Allow Additional Responses** to **NO**
- Change Allow No Bids to NO. If your bid has Alternate or Optional items for bidders and you wish to allow No Bids, we suggest creating an additional BidTable with those line items and have Allow No Bids set to YES on that BidTable.

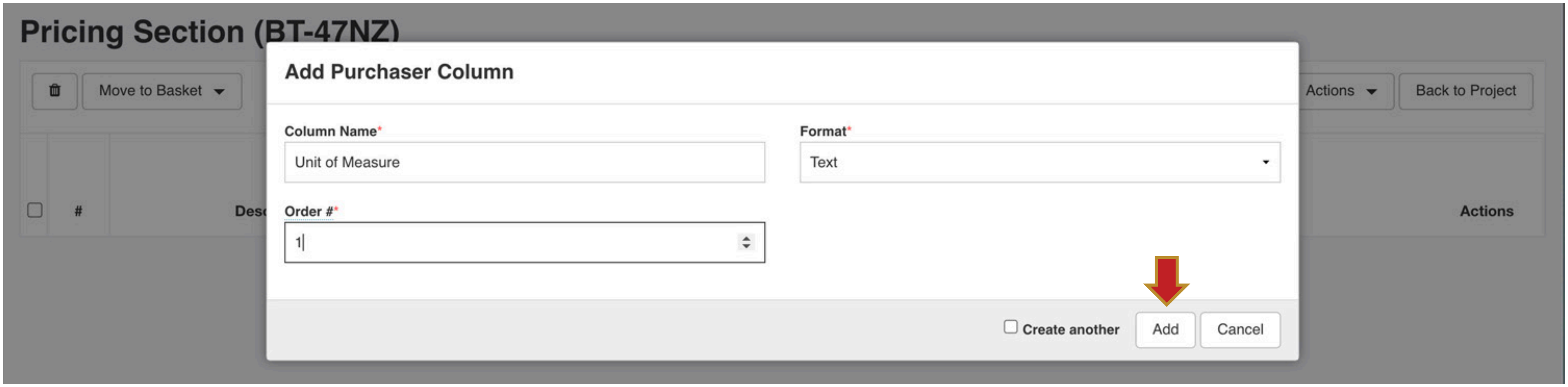




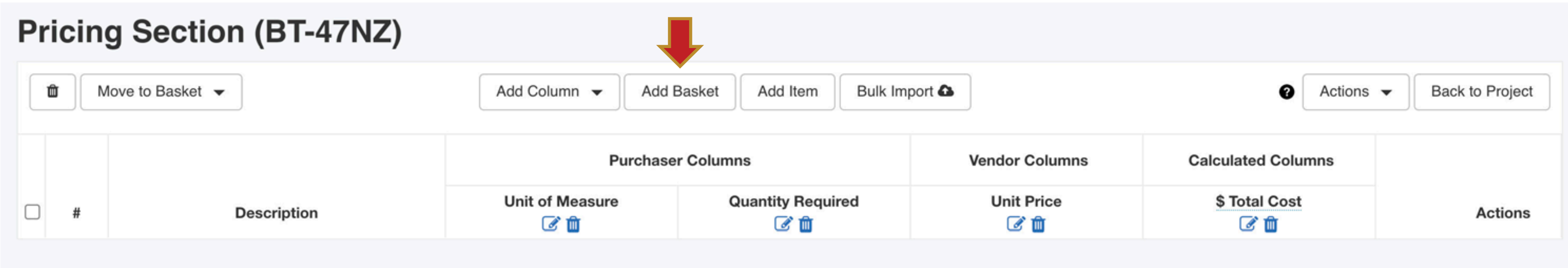
Select the **Add Column** button to insert a new **Purchaser Column** to the **BidTable**. In the **Column Name**, enter *Unit of Measure* and set the **Order #** to **1** and click the **Add** button. This will insert the Unit of Measure Column into your bid form.

You now have the ability to add additional columns to your pricing table. Select the **Create another** check-box and then the **Add** button.

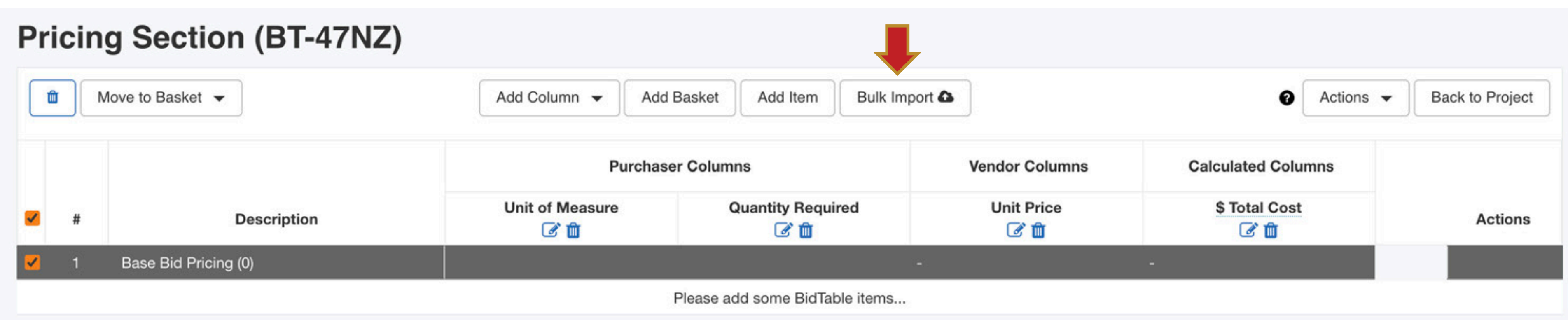




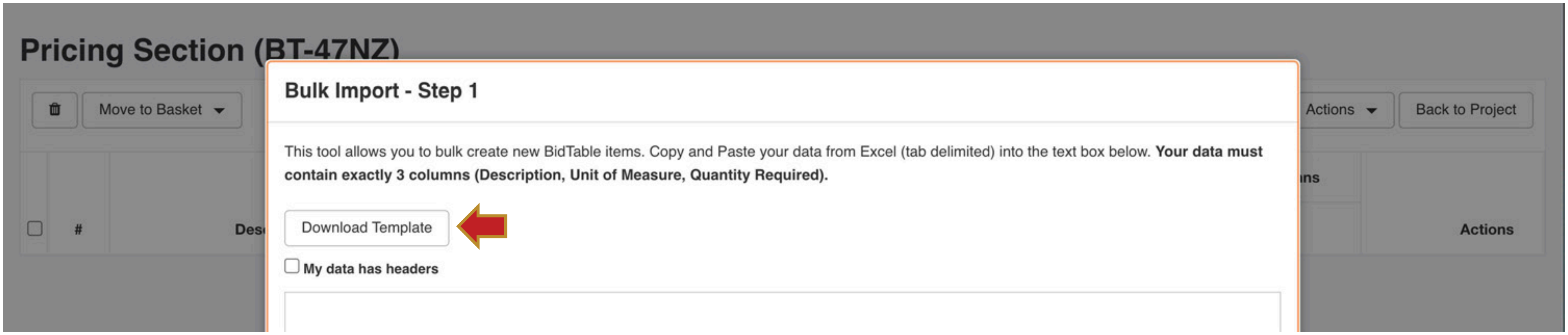
Select the **Add Basket** button to create a new basket or baskets (groups for pricing items). Enter the **Basket Name**. If you are adding more than one **Basket** to your **BidTable**, select the **Create another** check-box and click the **Add** button.



Next, select the **Bulk Import** button.

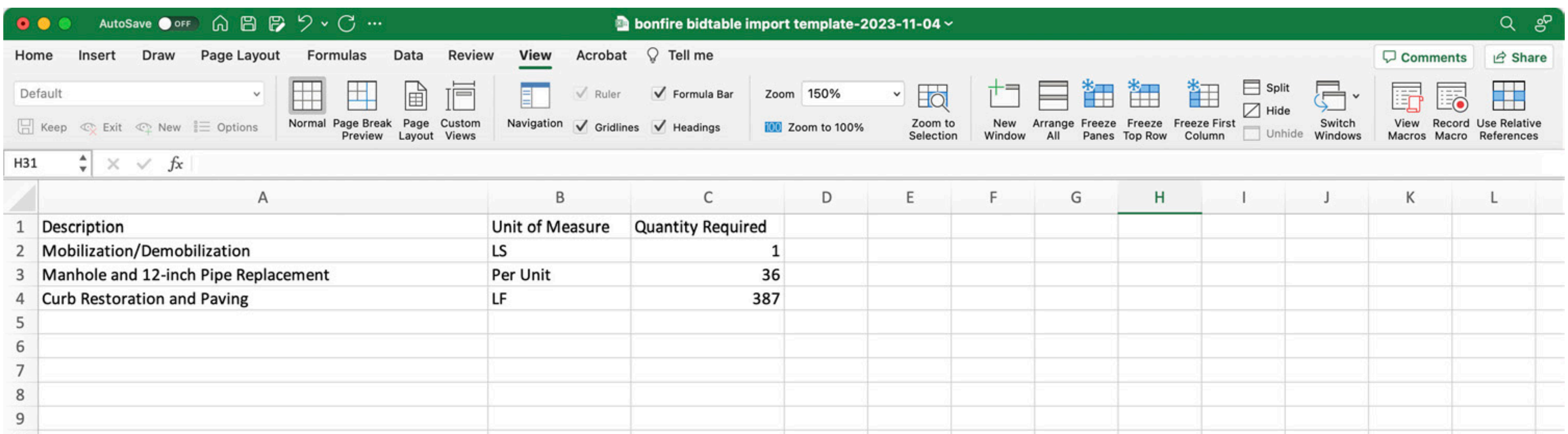


From the **Bulk Import - Step 1** screen, click the **Download Template** button. This will download an Excel template file for use in creating your **BidTable** for all pricing line items.



The Excel file will contain a column for the **Item Column Header Name** (Description), and each additional Purchaser Column.

Copy and past your line items into the Excel file making sure to include the **Description**, **Unit of Measure**, and **Quantity Required** cells for each line item.



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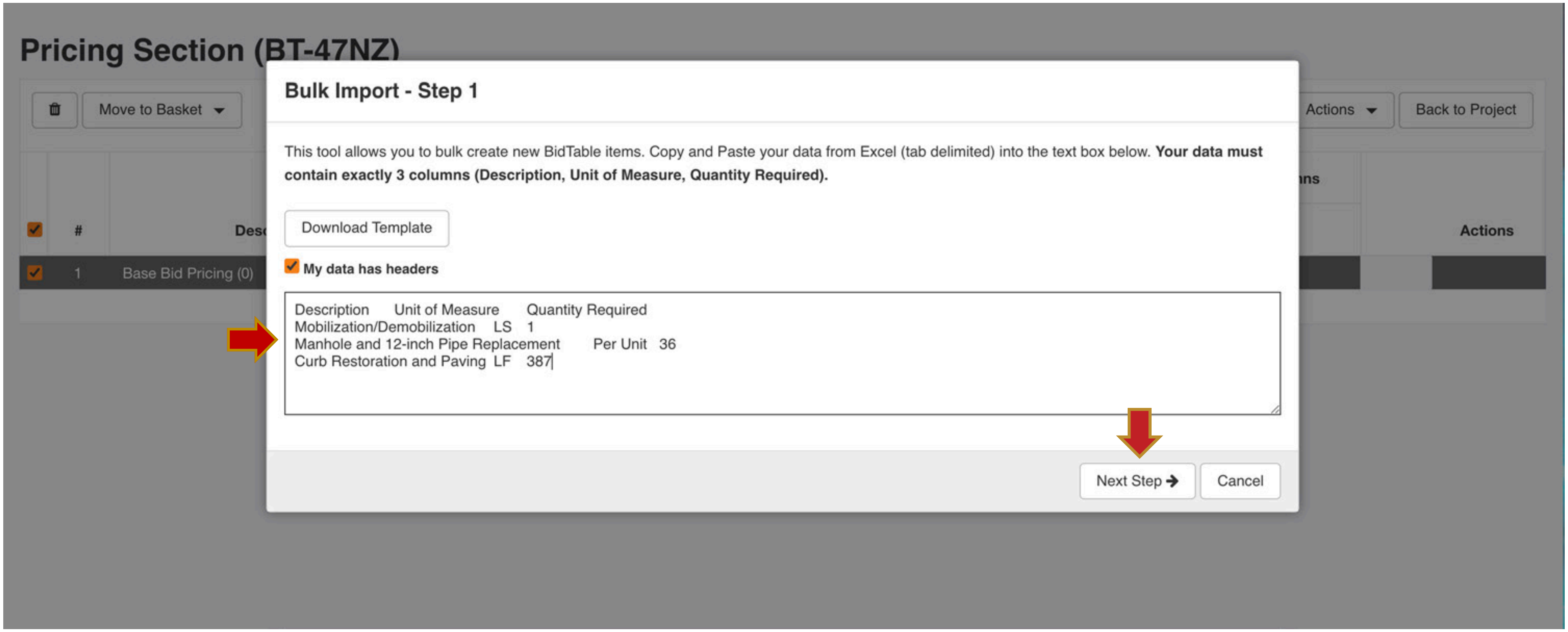
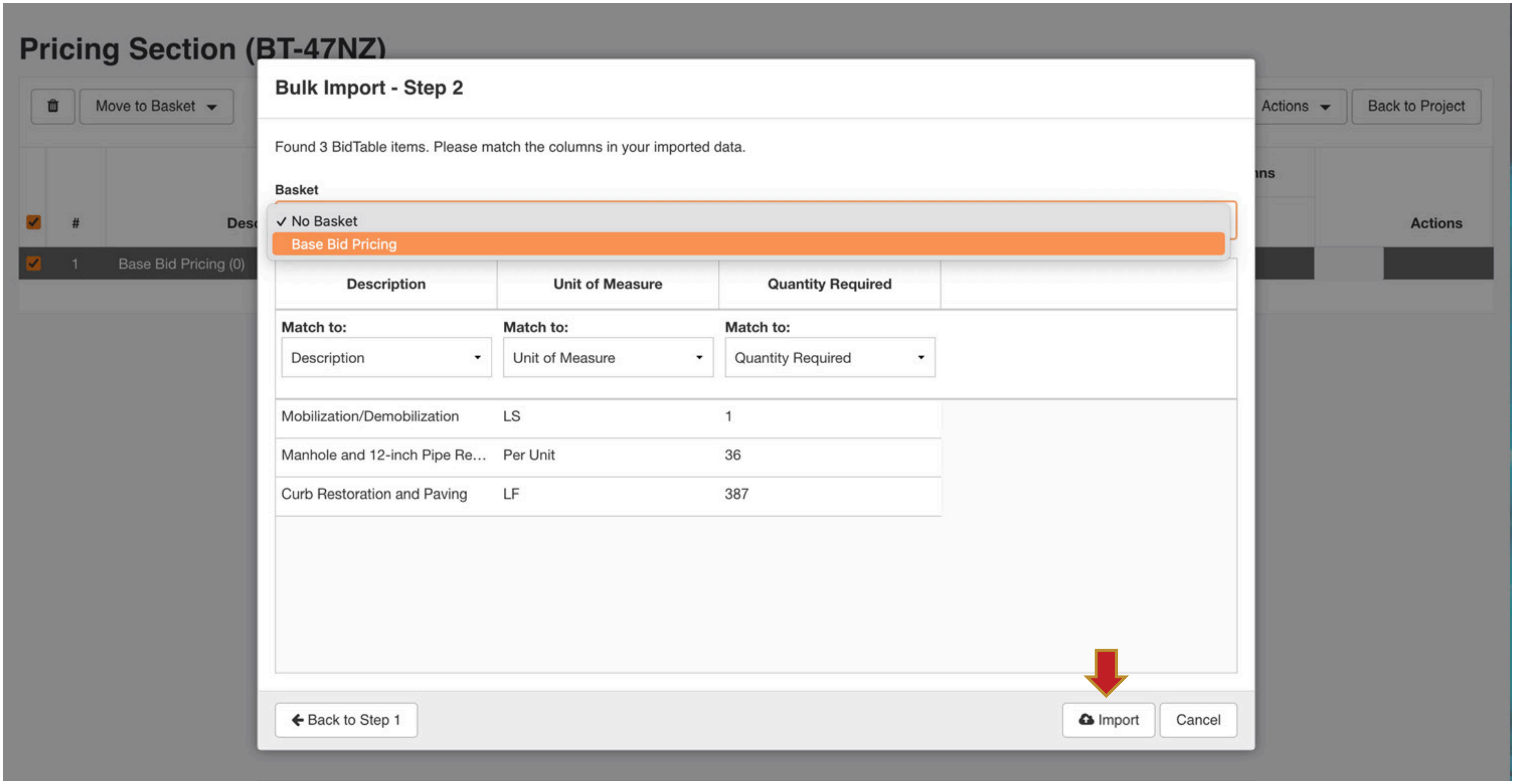
Select all the line items associated with one pricing **Basket** at a time (*if you have only one basket, select all the data*) including the column headers. Return to the **Bulk Import - Step 1** screen and paste the data into large data field. If you have copied the **Column Headers**, make sure that you select the **My data has headers** check-box.

Proceed to the **Next Step** by clicking the button.



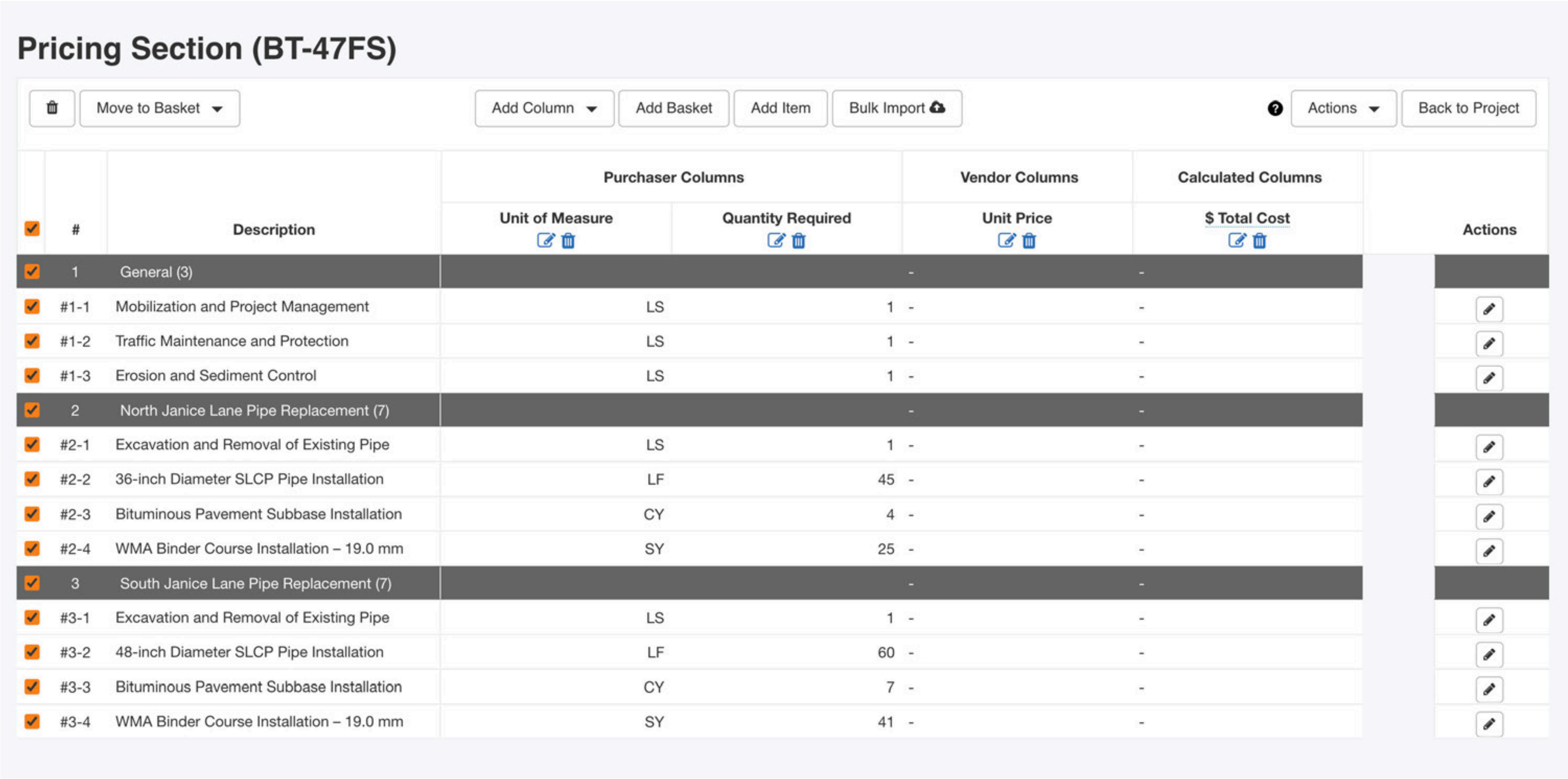
In the **Basket** drop-down menu, select the appropriate **Basket** that the line items need to be assigned to. If you have only one basket you should use the **Base Bid Pricing** basket created earlier.

Review the data import to verify that the data is mapped to the correct columns and click the **Import** button. If you see any errors or issues you can return to the previous step by clicking the **Back to Step 1** button.



Repeat this process for each pricing **Basket** you have for your **BidTable**. You do not need to create separate Excel sheets for each basket. Simply select the line items for each **Basket** section and copy /paste as needed.

When finished, you will see your pricing **BidTable** as illustrated by the sample below.



#	Description	Purchaser Columns: Unit of Measure	Purchaser Columns: Quantity Required	Vendor Columns: Unit Price	Calculated Columns: $ Total Cost	Actions
1	General (3)			-	-	
#1-1	Mobilization and Project Management	LS	1	-	-	
#1-2	Traffic Maintenance and Protection	LS	1	-	-	
#1-3	Erosion and Sediment Control	LS	1	-	-	
2	North Janice Lane Pipe Replacement (7)			-	-	
#2-1	Excavation and Removal of Existing Pipe	LS	1	-	-	
#2-2	36-inch Diameter SLCP Pipe Installation	LF	45	-	-	
#2-3	Bituminous Pavement Subbase Installation	CY	4	-	-	
#2-4	WMA Binder Course Installation – 19.0 mm	SY	25	-	-	
3	South Janice Lane Pipe Replacement (7)			-	-	
#3-1	Excavation and Removal of Existing Pipe	LS	1	-	-	
#3-2	48-inch Diameter SLCP Pipe Installation	LF	60	-	-	
#3-3	Bituminous Pavement Subbase Installation	CY	7	-	-	
#3-4	WMA Binder Course Installation – 19.0 mm	SY	41	-	-	

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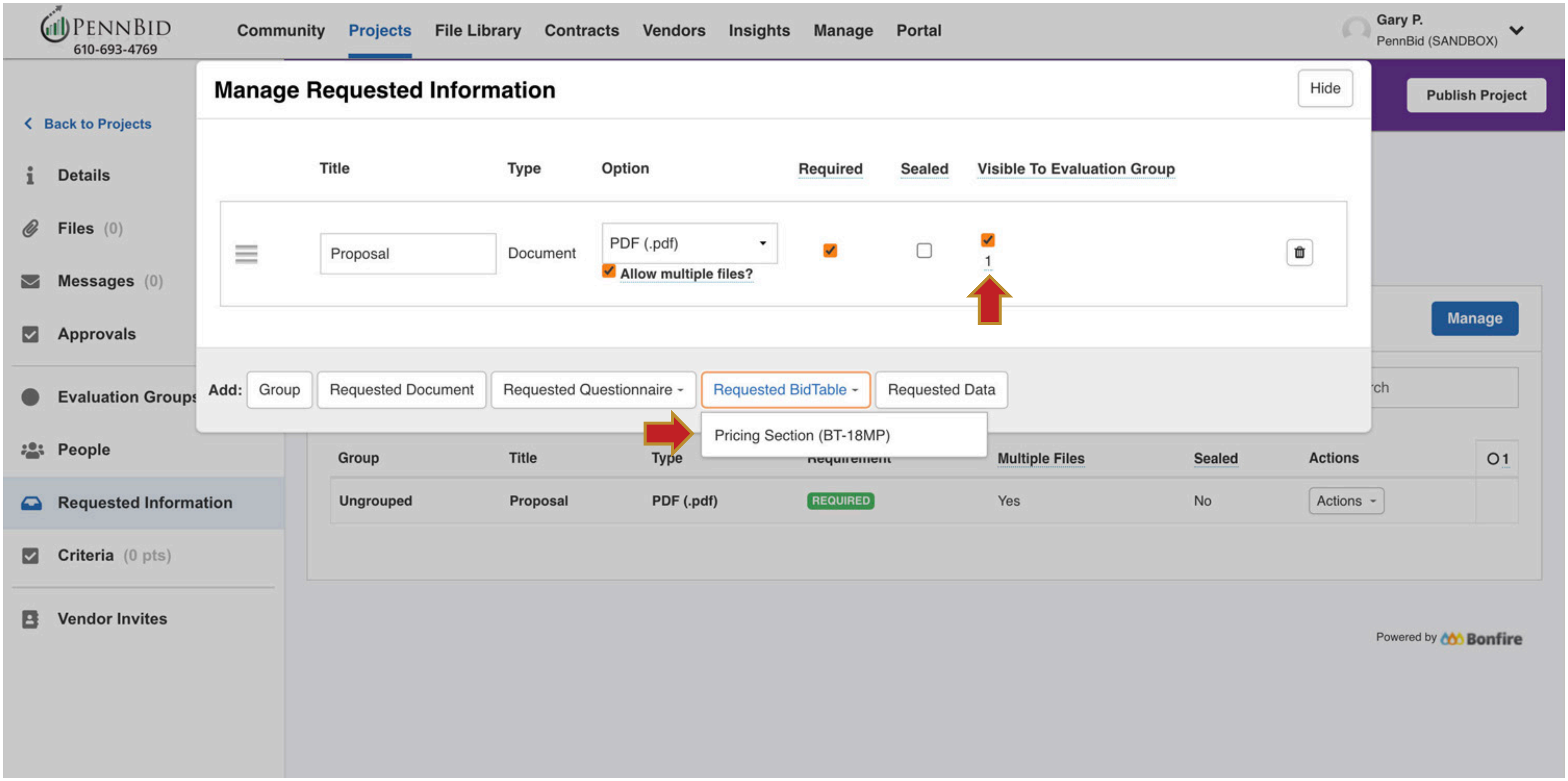
Map your final **BidTables(s)** to you project by returning to the **Requested Information** tab. First, click the **Manage** button on the right. Then, at the bottom of the pop-up screen click the **Requested BidTable** button and select the appropriate **BidTable**.

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

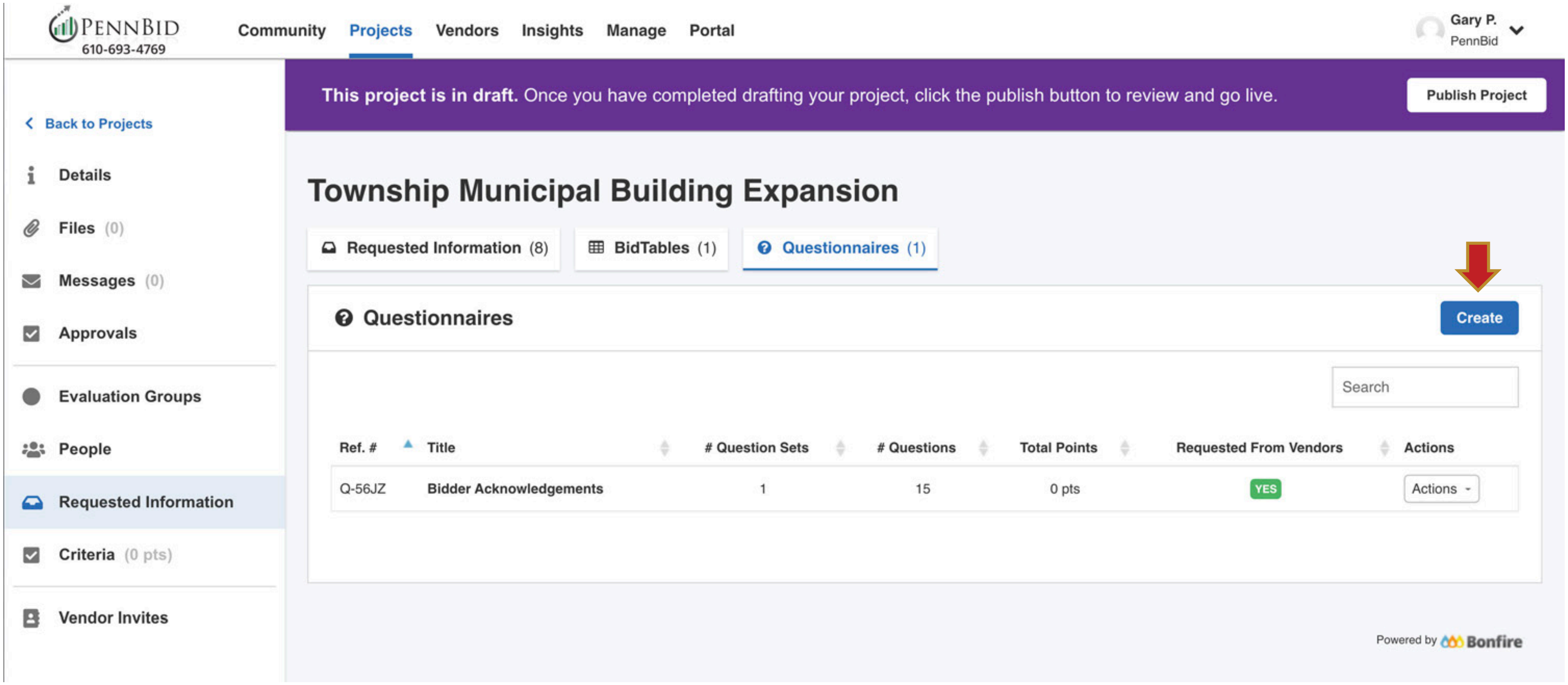
After adding them to the **Manage Requested Information** screen, simply drag them to the correct information group using the three (3) lines to the left of the **BidTable Title**.



Questionnaires Tab

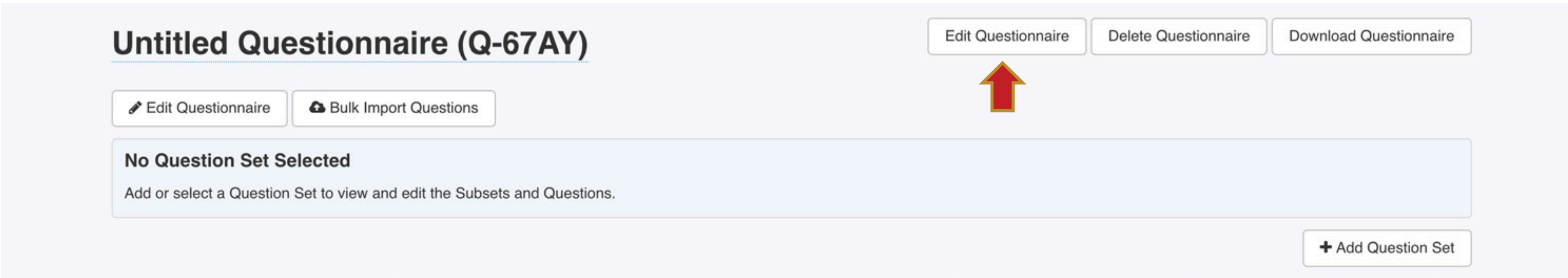
The bidder acknowledgments or **Questionnaires** related to your project are set up here.

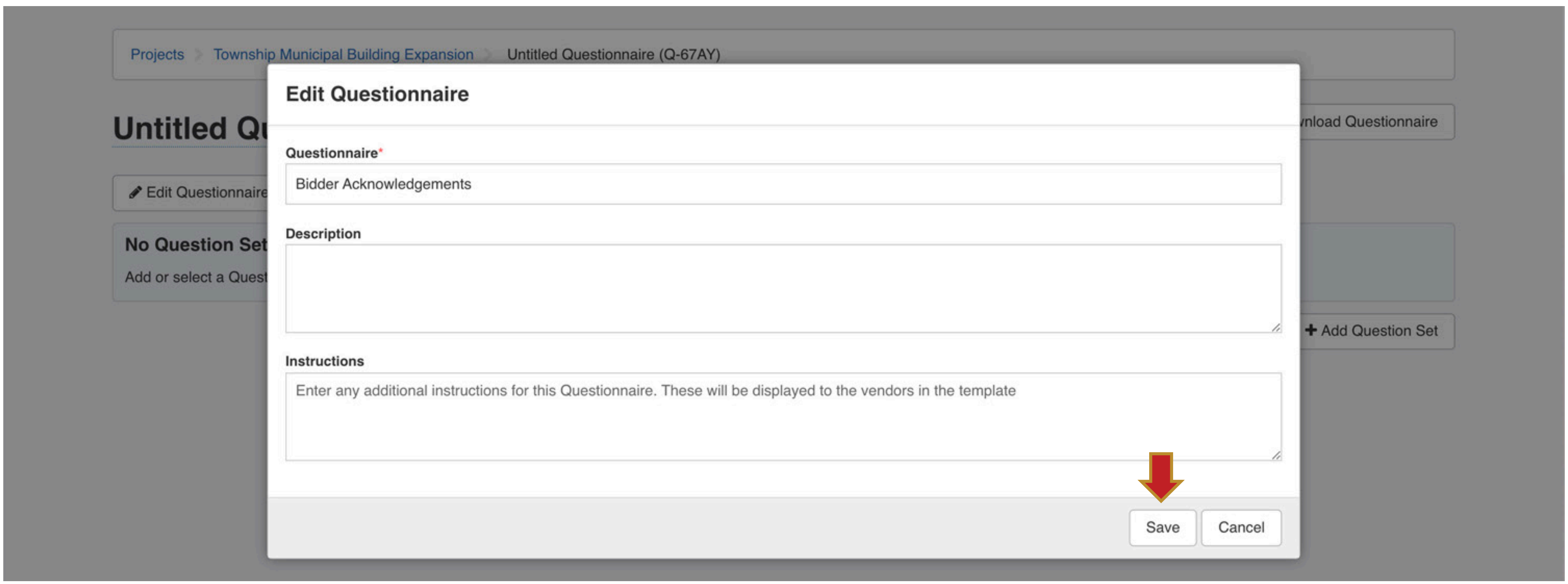
To create a new **Questionnaire**, click the **Create** button on the right side of the screen.



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

Click the **Edit Questionnaire** button and change the name to "*Bidder Acknowledgments*". Click the **Save** button.





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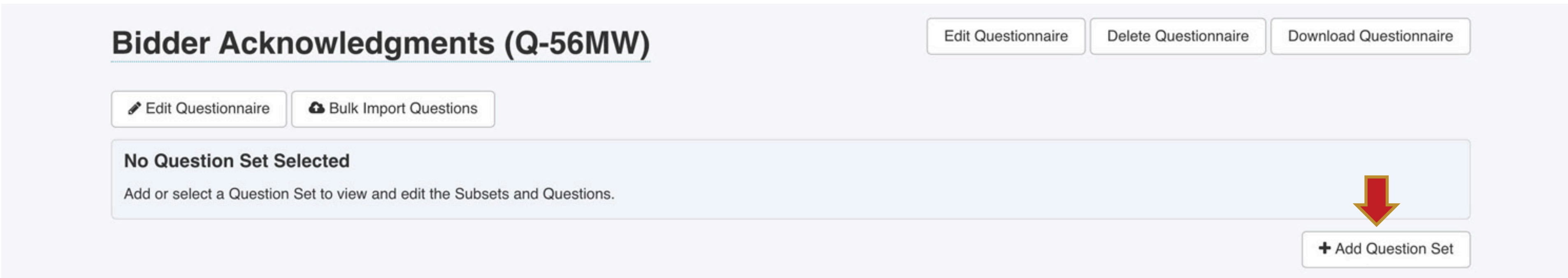
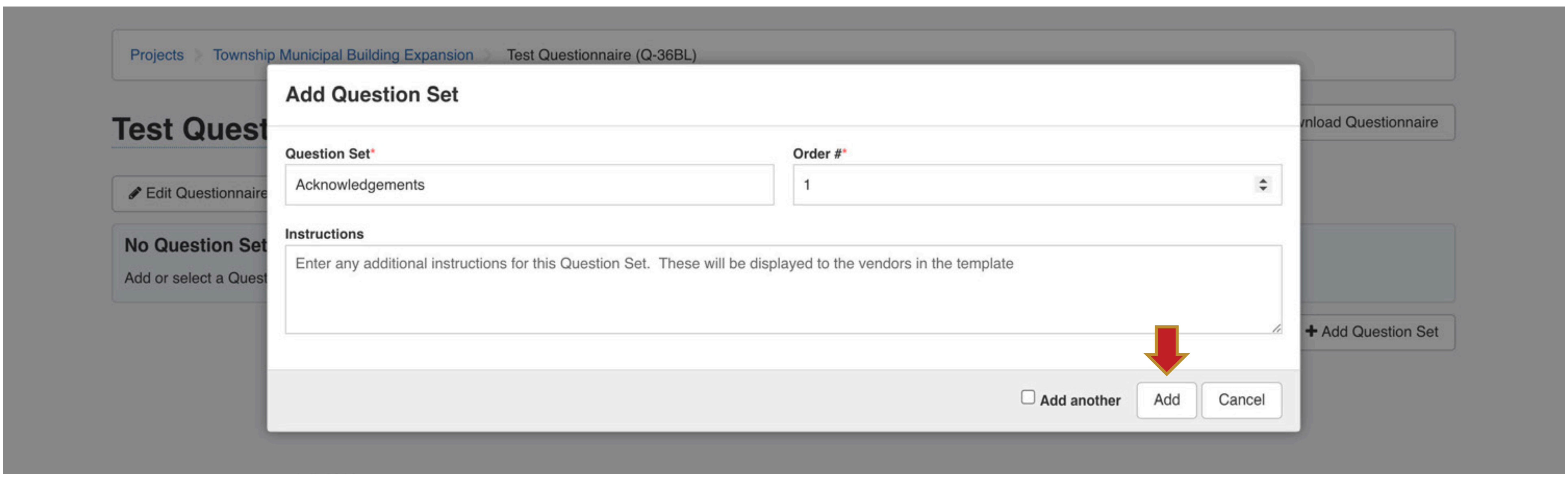
Click the **Add Question Set** button in the lower right hand corner of the screen.

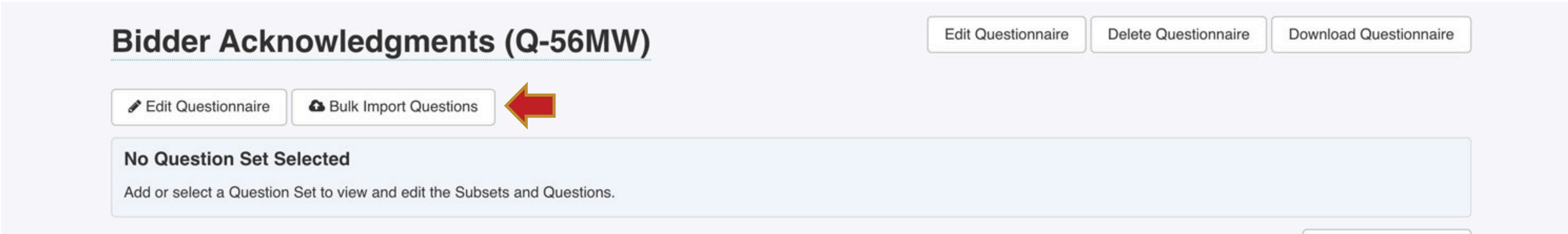
In the **Question Set** text box enter *"Acknowledgments"*. When adding only one **Questions Set**, make sure the **Add another** box is <u>unchecked</u> before clicking **Add**.

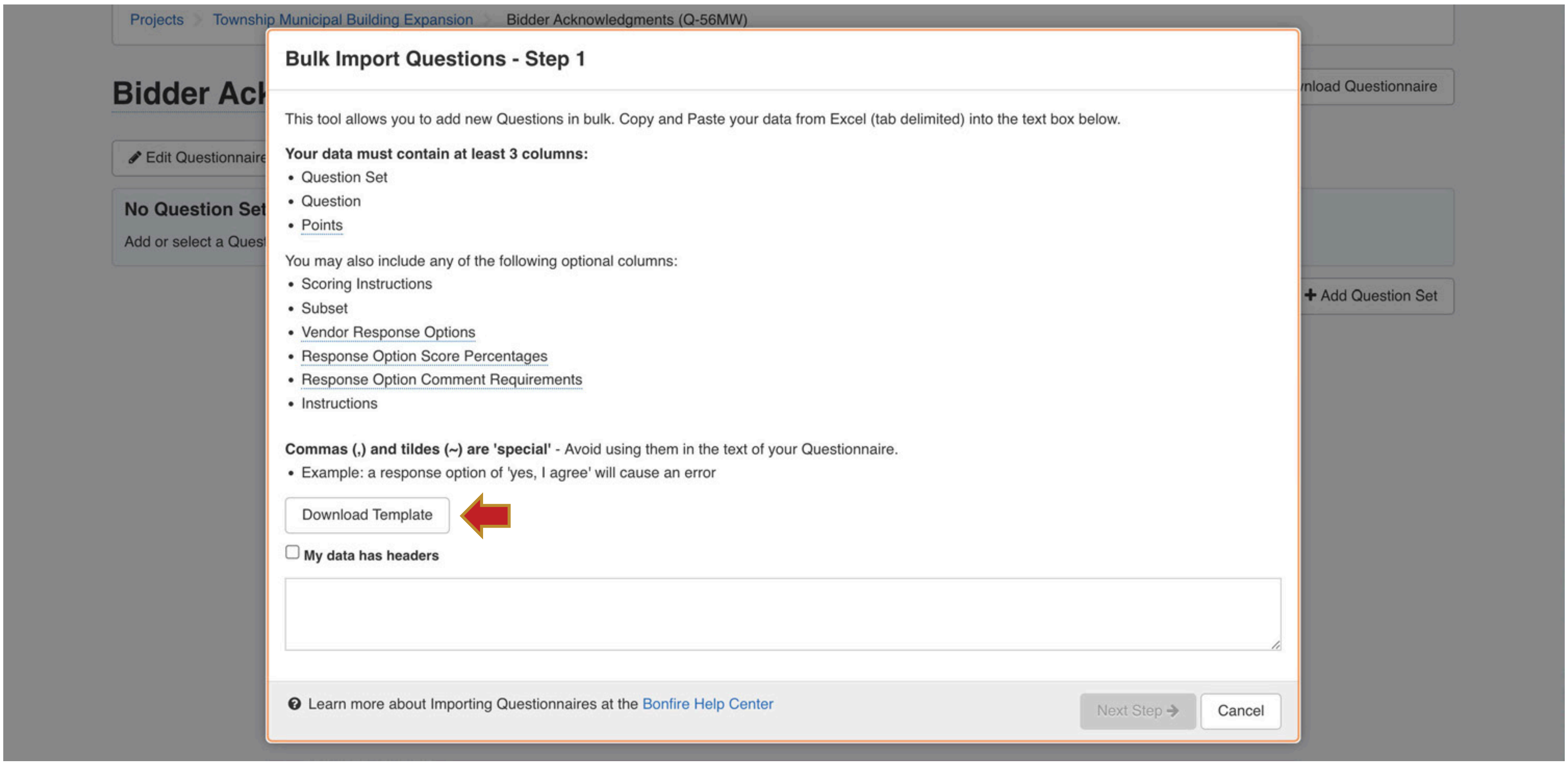
While uncommon; if you are adding more than one **Questions Set**, select the **Add another** check-box, then click the **Add** button.





Click the **Bulk Import Questions** button. From the **Bulk Import Questions - Step 1** window, click the **Download Template** button.





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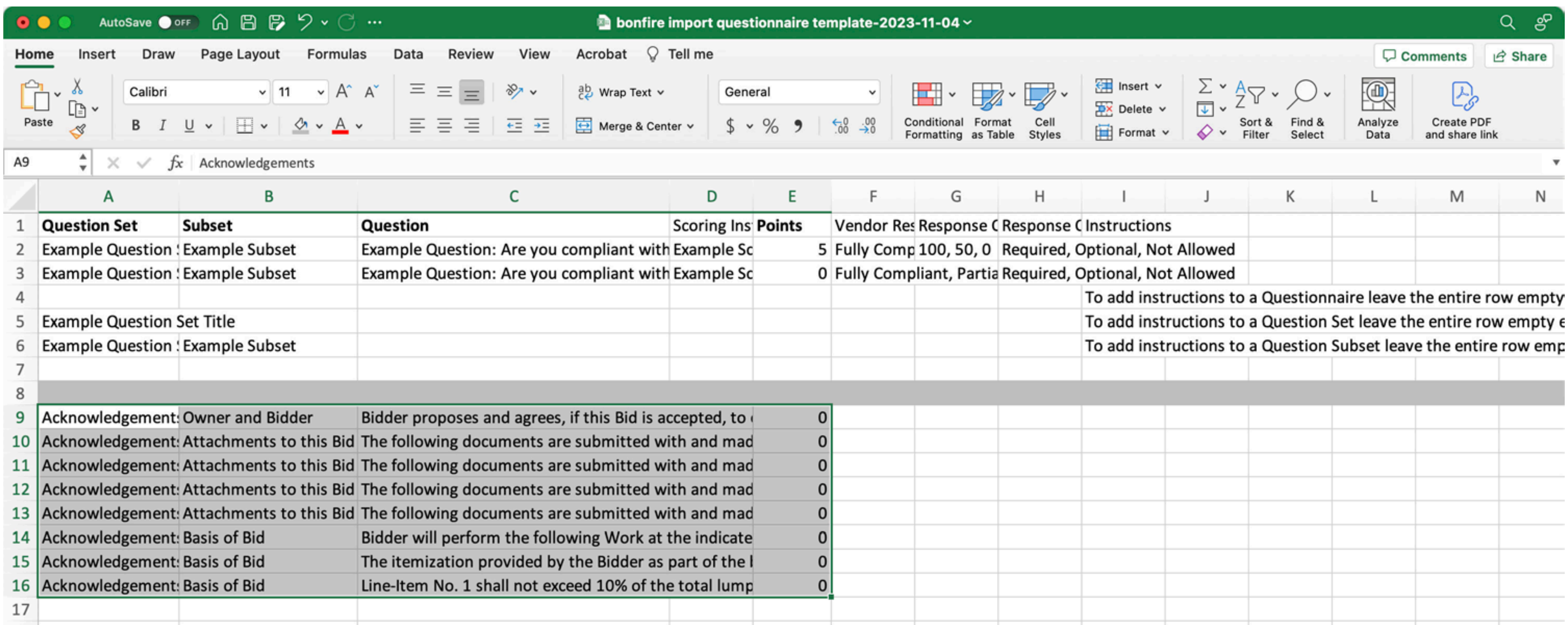
This will download an Excel template file for use in creating your **Bidder Acknowledgments**, **Question Sets**, and **Subsets** for bidders to respond to the Acknowledgments.

The Excel file will contain columns for data entry. The three (3) required columns are: **Question Set**, **Question**, and **Points**. If you have question groups, they will be set using the **Subset** column (not required).

Below the auto-generated content in the spreadsheet (beginning around line 9) enter the following from your bidding documents:

- **Question Set** column - Enter "Acknowledgments"
- **Subset** column - Enter your question group title. If no groups are required, leave this column blank. (Ex: "*Owner and Bidder*")
- **Question** column - Copy and paste your content or information
- **Points** column - Enter zero "(0)

Select all the data you have entered in the Excel file and "copy" to your clipboard (you will paste this into PennBid).


bonfire import questionnaire template-2023-11-04

A9 Acknowledgements

	A	B	C	D	E	F	G	H	I
1	Question Set	Subset	Question	Scoring Ins	Points	Vendor Res	Response (	Response (	Instructions
2	Example Question :	Example Subset	Example Question: Are you compliant with	Example Sc	5	Fully Comp	100, 50, 0	Required, Optional, Not Allowed	
3	Example Question :	Example Subset	Example Question: Are you compliant with	Example Sc	0	Fully Compliant, Partia		Required, Optional, Not Allowed	
4									To add instructions to a Questionnaire leave the entire row empty
5	Example Question Set Title								To add instructions to a Question Set leave the entire row empty e
6	Example Question :	Example Subset							To add instructions to a Question Subset leave the entire row emp
7									
8									
9	Acknowledgement:	Owner and Bidder	Bidder proposes and agrees, if this Bid is accepted, to		0				
10	Acknowledgement:	Attachments to this Bid	The following documents are submitted with and mad		0				
11	Acknowledgement:	Attachments to this Bid	The following documents are submitted with and mad		0				
12	Acknowledgement:	Attachments to this Bid	The following documents are submitted with and mad		0				
13	Acknowledgement:	Attachments to this Bid	The following documents are submitted with and mad		0				
14	Acknowledgement:	Basis of Bid	Bidder will perform the following Work at the indicate		0				
15	Acknowledgement:	Basis of Bid	The itemization provided by the Bidder as part of the I		0				
16	Acknowledgement:	Basis of Bid	Line-Item No. 1 shall not exceed 10% of the total lump		0				
17									

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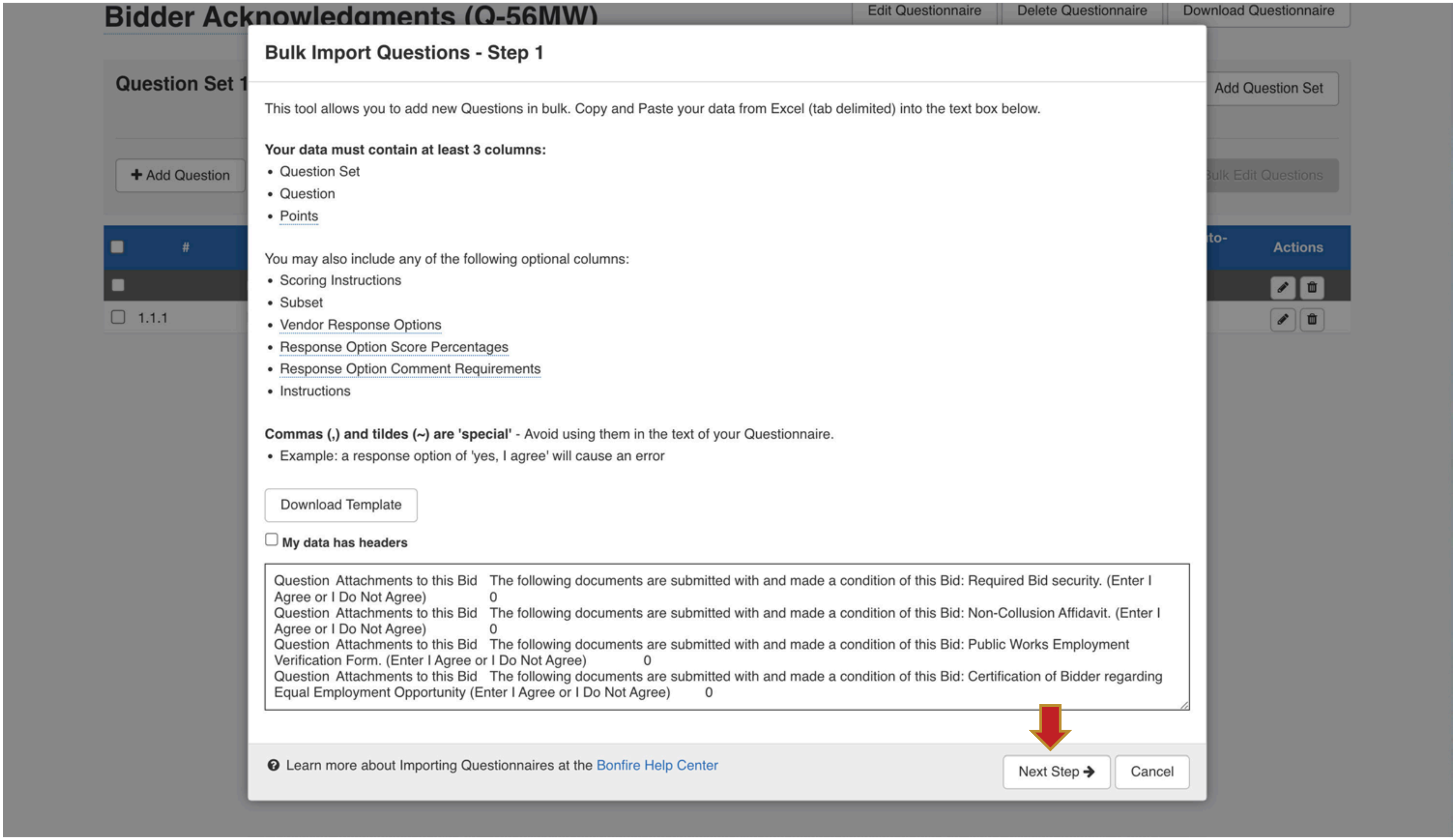
Return to the **Bulk Import Questions - Step 1** screen and paste the data into large data field.
Keep the **My data has headers** box unchecked.

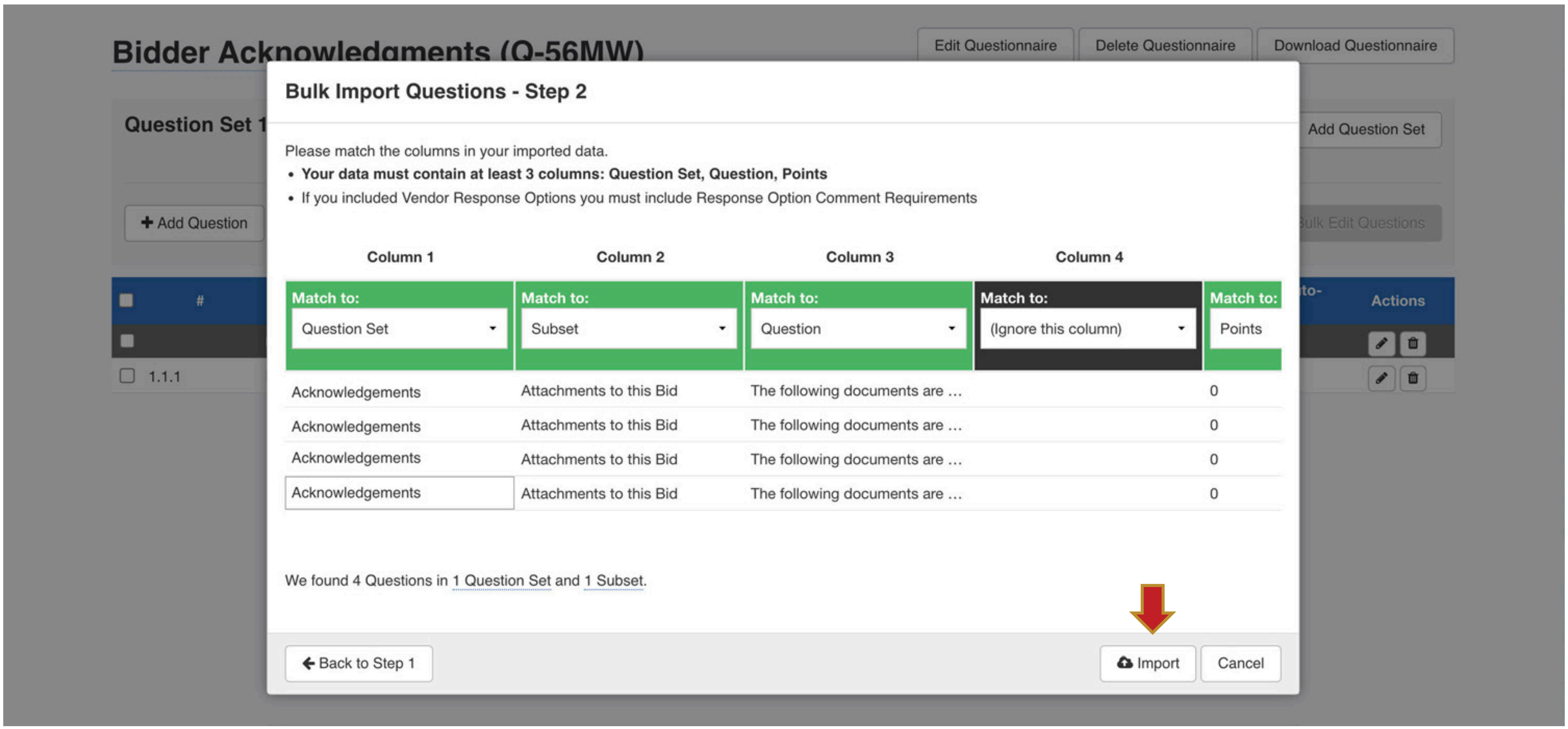
Proceed to the **Next Step** by clicking the button.



Map the imported data to the correct **Column Headers**. If a column is blank keep the (Ignore this column) selection.

Column 1 – *"Acknowledgments"*
Column 2 – Question group title if you have groups, otherwise this should be set to (Ignore this column)
Column 3 – Your individual questions
Column 4 – (Ignore this column)
Column 5 – Should be set to zero (0)

Click the **Import** button to complete the import process.



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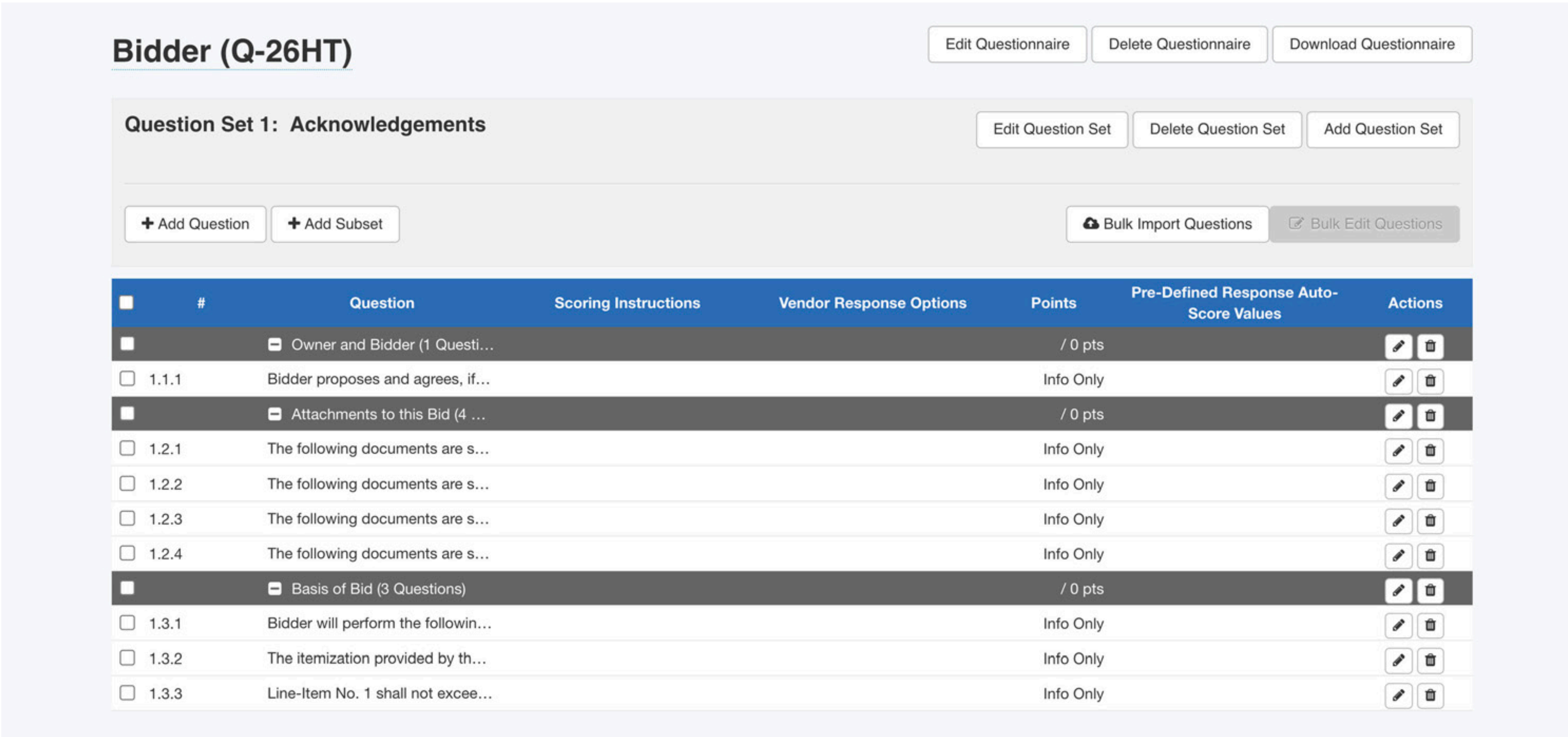
When finished, you will see your pricing **Questionnaire** as illustrated by the sample below.

You have the ability to **Add Questions** or **Add Subsets** or **Edit the Questionnaire** or **Question Sets** by clicking the buttons indicated.



	#	Question	Scoring Instructions	Vendor Response Options	Points	Pre-Defined Response Auto-Score Values	Actions
		Owner and Bidder (1 Questi…			/ 0 pts		
	1.1.1	Bidder proposes and agrees, if…			Info Only		
		Attachments to this Bid (4 …			/ 0 pts		
	1.2.1	The following documents are s…			Info Only		
	1.2.2	The following documents are s…			Info Only		
	1.2.3	The following documents are s…			Info Only		
	1.2.4	The following documents are s…			Info Only		
		Basis of Bid (3 Questions)			/ 0 pts		
	1.3.1	Bidder will perform the followin…			Info Only		
	1.3.2	The itemization provided by th…			Info Only		
	1.3.3	Line-Item No. 1 shall not excee…			Info Only		

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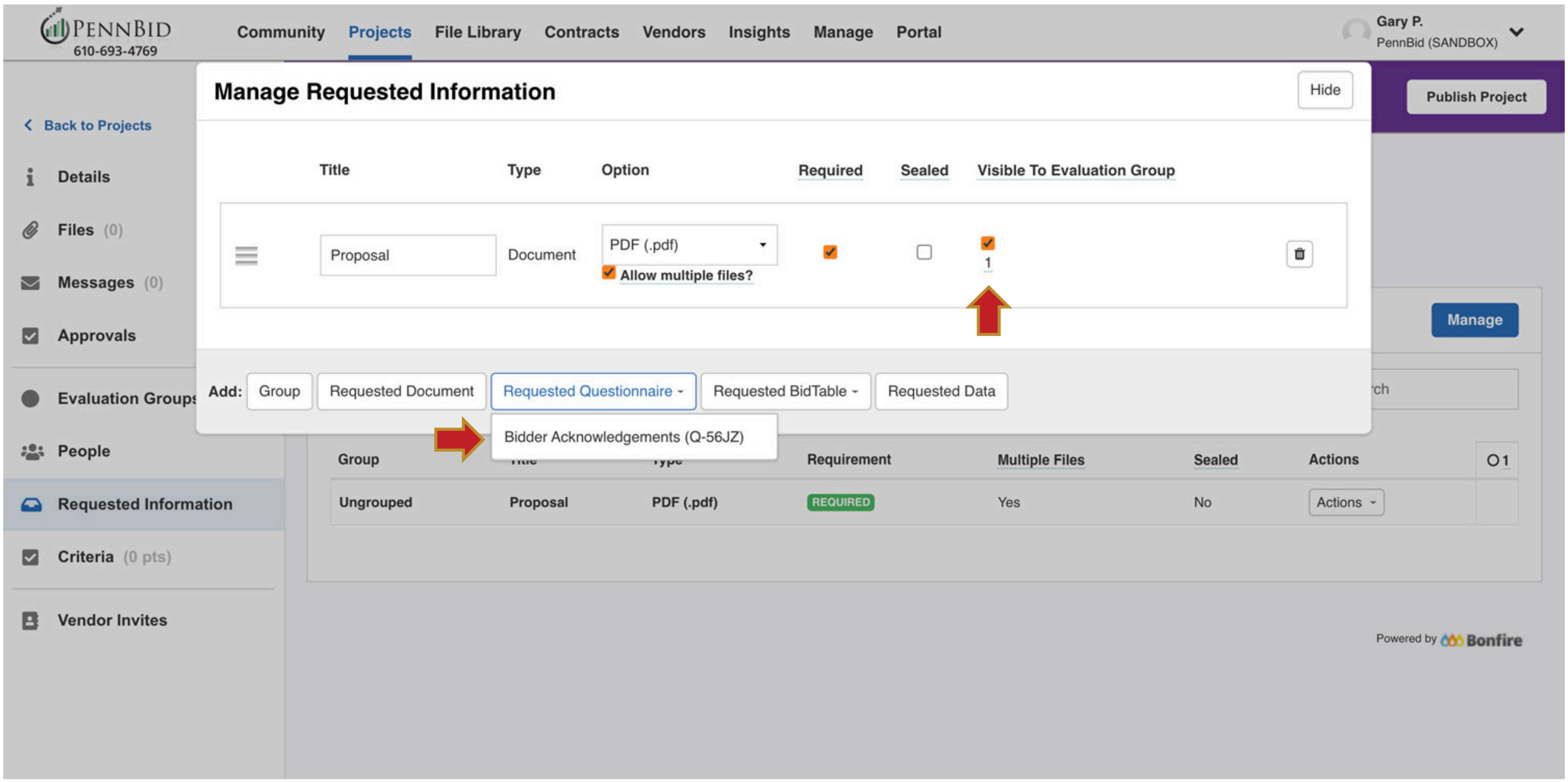
Map your final **Questionnaire(s)** to you project by returning to the **Requested Information** tab. First, click the **Manage** button on the right. Then, at the bottom of the pop-up screen click the **Requested Questionnaire** button and select the appropriate **Questionnaire**.

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

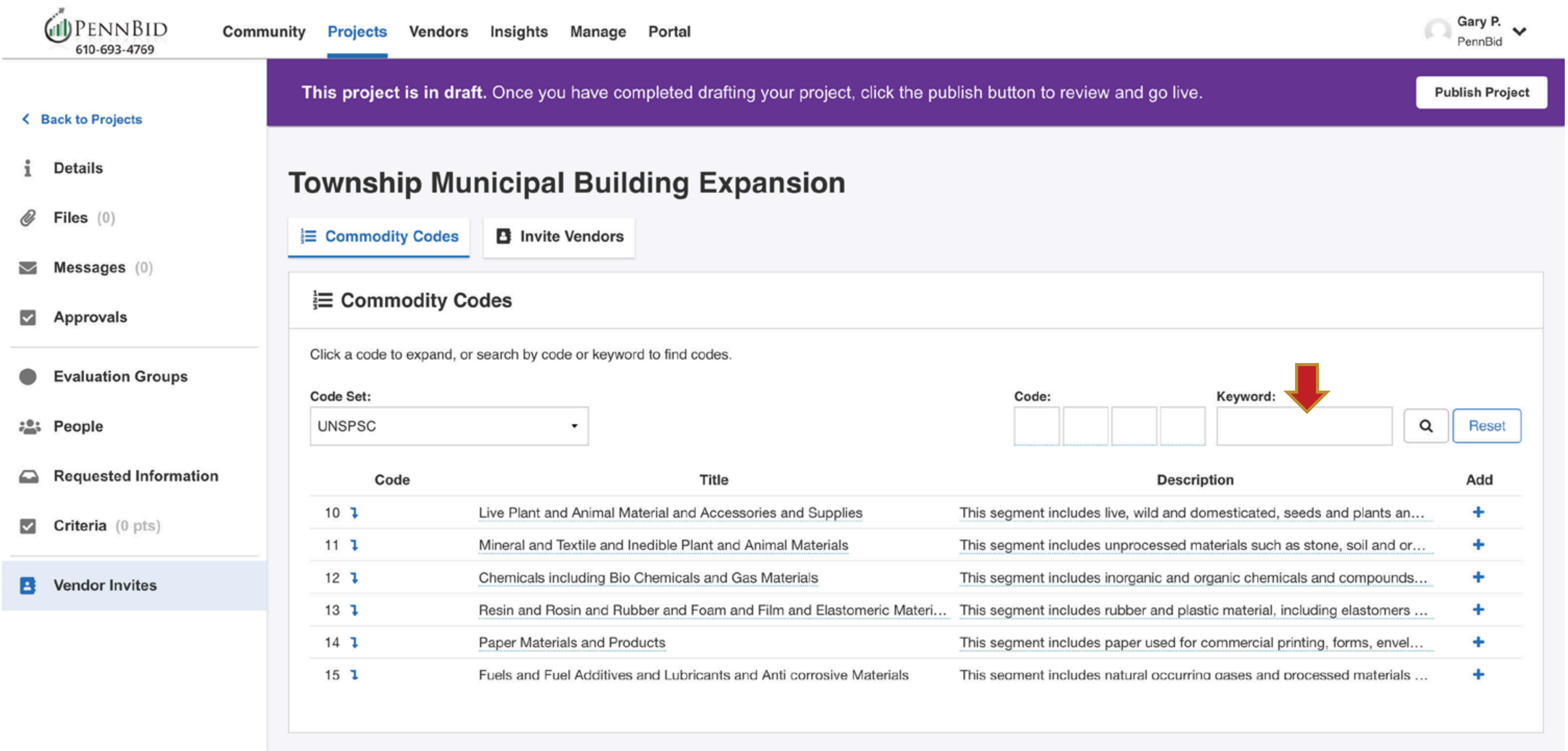
After adding them to the **Manage Requested Information** screen, simply drag them to the correct information group using the three (3) lines to the left of the **Questionnaire Title**.



Vendor Invites Section

Select the **Vendor Invites** section. This is where you choose which relevant **Commodity Codes** should be utilized for the services or products required in your solicitation. The codes you choose determine the vendor audience that is reached based on the **Commodity Codes** vendors selected when they self-registered with PennBid. This will “invite” the correct Vendors/Bidders to submit for your project.

You can **Keyword** search the UNSPSC codes using the keyword search box.



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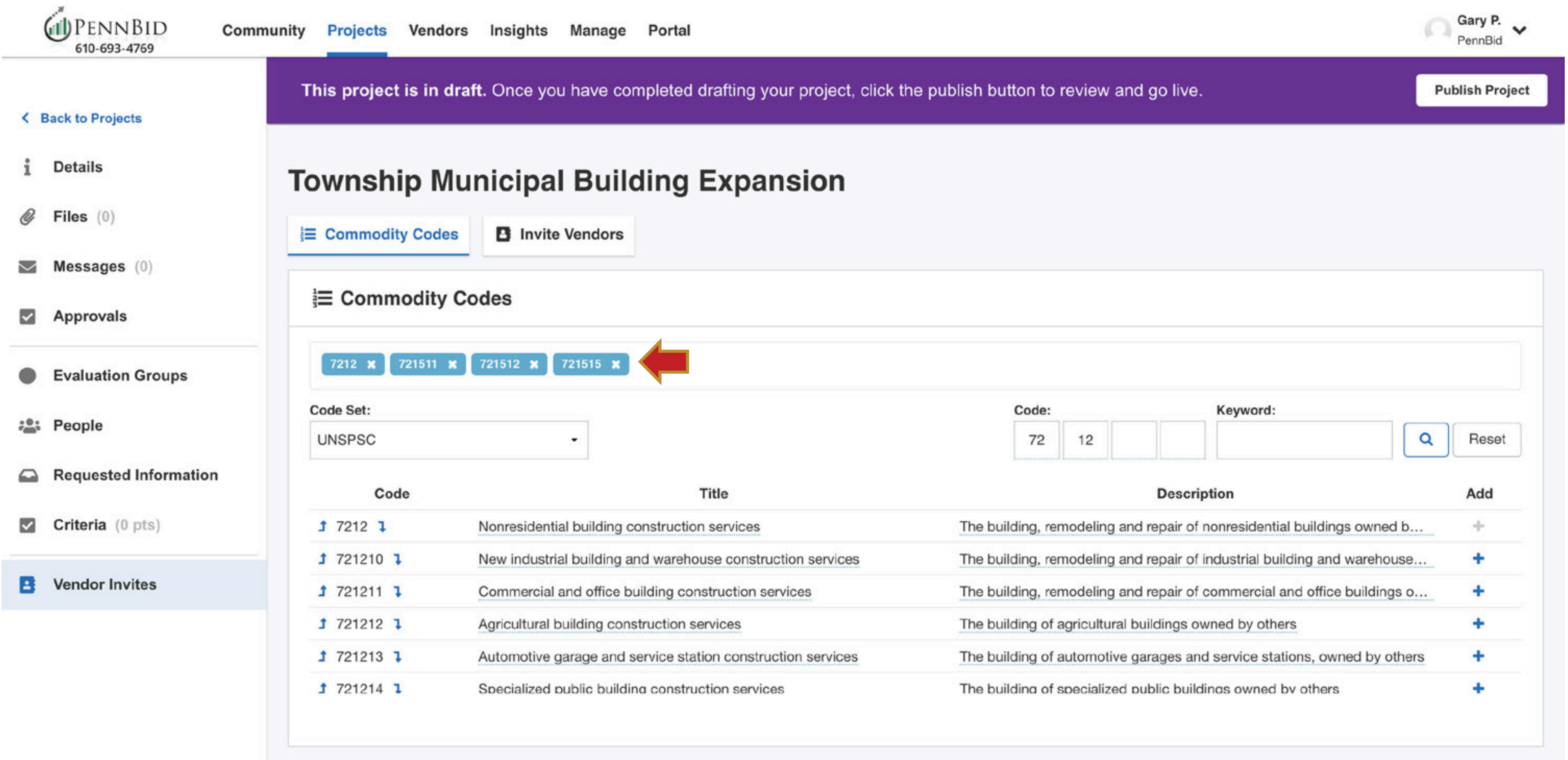
We recommend using **four (4) or six (6) Digit Codes (ex. 72 14 / 72 15 11)**. This will ensure a broader range of Bidders are reached once your project is **OPEN**. There is no limit to the quantity of **Commodity Codes** you add to your project.



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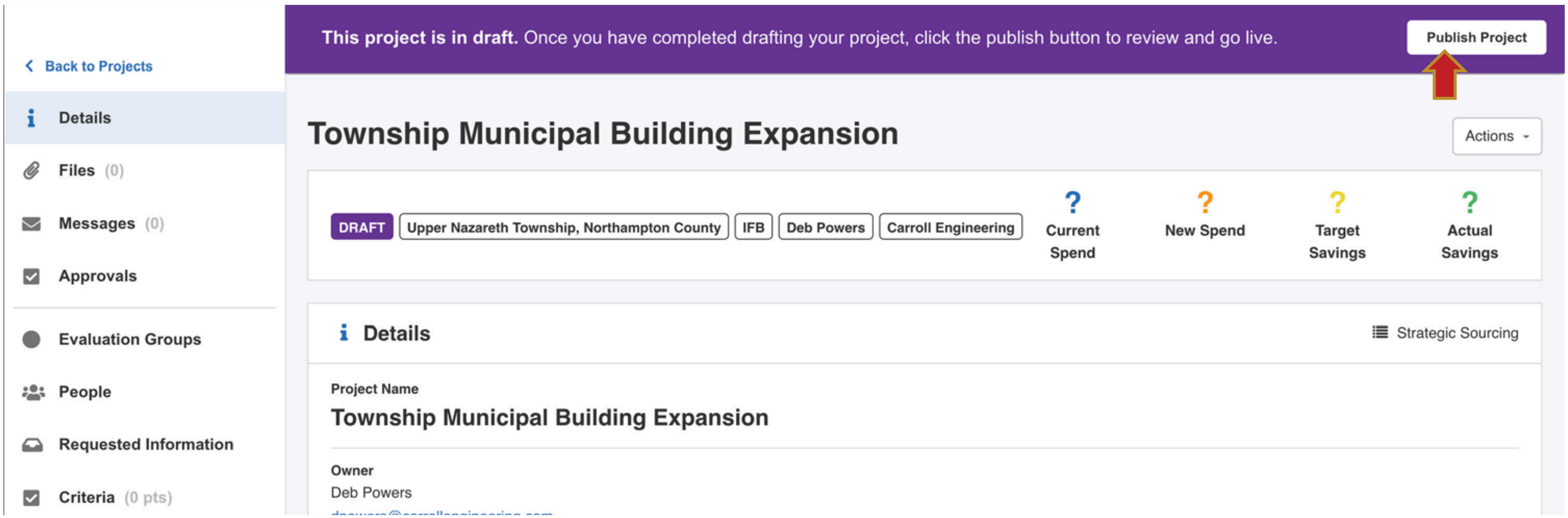
Getting Ready to Go Live

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**.