# User Guide

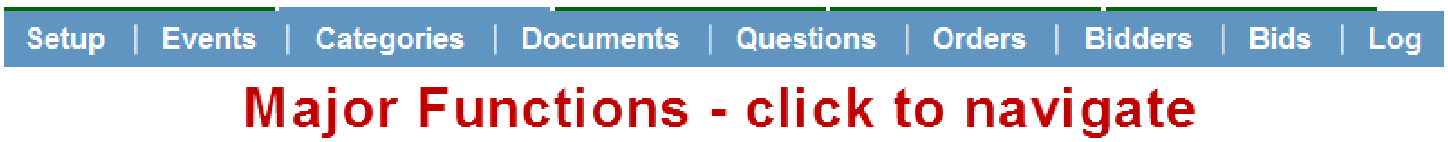
## How to Set Up and Manage Your Bids

This guide is intended to facilitate setting up, displaying, and managing your bids. Support Videos are always available for most of the topics described herein. Video Link

## Getting Started – A Few Basis

- Prior to a sealed Bid Opening date and time, all information submitted by each bidder is confidential and cannot be viewed by anyone (including the eBid Systems' Office).
- Bidders cannot modify, adjust, or withdraw their bid or supporting documents after the Bid Opening date and time.

**Function Bar** – All major functions to set up and manage solicitation are displayed along the top **Function Bar**. The Function Bar is visible on every screen.




**Bidders' View** – The bidders' view of the solicitation is quite different than yours. Bidders can access information, ask and view questions / answers, and submit their bids and supporting information.

**Modifying Your Solicitations** – You can modify all fields and information related to your solicitations at any time during the bidding process. Adding documents and addenda, changing the bid due date, adjusting the Bid Forms, or sending communications to all bidders can be done with just a mouse click. Note – The ability to communicate with all bidders remains intact beyond the Bid Due Date and Time. To make changes to any screen, click Edit then Update.

**Copy & Paste** – Copy and paste functionality works throughout the Program, allowing the transfer of information and text from other documents.

**Exporting** – almost all Functions contain an Export icon that will deliver the information to your desktop as an Excel file.  Here is an example from the **Bidders** tab.


**Exports an Excel file directly to your desktop**

**Multi-Prime Projects** – eBid Systems excel at both single and multi-prime projects.  Setting up a multi-prime is described near the end of the **Adding A New Solicitation** section.

**Periodic Solicitations and Re-biding** – The “**Clone**” feature described near the end of the **Adding A New Solicitation** section is a highly valued feature for periodic / seasonal solicitations and re-bidding.

eBid systems

PASSHE

# Managing Solicitations-Quick Reference

**Solicitation** → Dashboard view of all solicitations along with key or actionable items for each

**View**

**Add** → Add new solicitation

**Set-up** → Fundamental solicitation info, visible on Home Page

**Events** → Pre-bid meeting, site walkdowns, etc. E-registration and attendance

**Categories** → Using NIGP codes help define bidder pool

**Documents** → Customizable folders for organizing and housing all solicitation documents (specs, drawings, addenda, pre-qualifications, etc)

**Questions** → Allows vendors to ask questions and view posted answers at any time.

**Bidders** → Building bidder lists | viewing bidder details | notifying bidders (general messages, addenda) | viewing who downloaded documents and bid

**Bids** →

- Enables online sealed bidding
- Define type of bid (document, lump sum, line item)
- Input bid questions and forms
- Reviewing submitted bid documents

**Bid analysis** – comparing bid submissions against engineering estimate or low bid

**Awards** – award bid by lump sum or line item

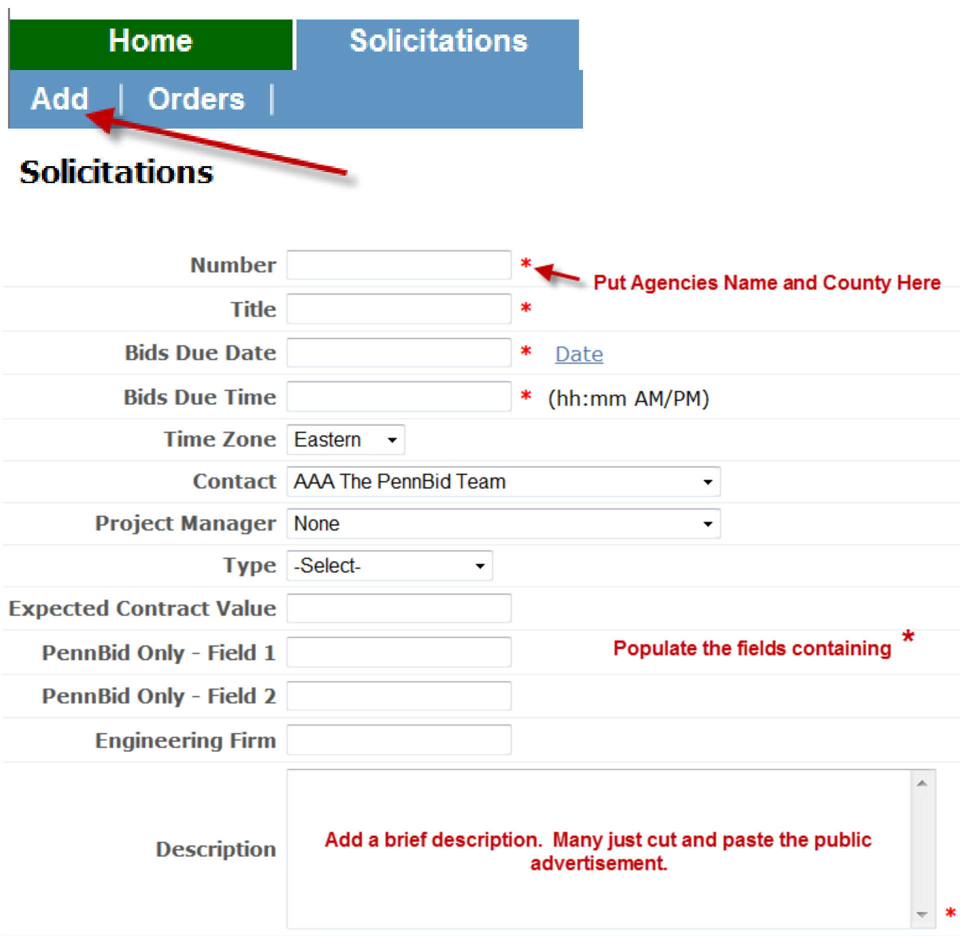
**Display** – defines what and how award information will be displayed and communicated.

**Log** → Date and time stamped record of communications sent by agency; received, acknowledged, and downloaded by bidders

## Let's Get Started

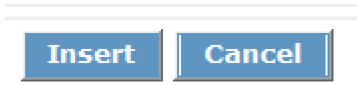
Log-in with your email address and password. If you need an account, please send an email via the Contact Us button located at the top right of each screen.

Click "**Add**" and populate the fields.




**As a minimum, populate fields containing *.**

# Adding a New Solicitation

Scroll Down and Click 


The screen will change and from here forward the top bar will contain the Function Bar control buttons as shown below.


Function Bar - at the top of every screen

# Setup

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

Major Control Functions within the top bar

**Solicitation Shady Maple Authority - Setup**
**Construction of New Dog Box for Mascot**
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

Very Important - Do not click "show" until you are ready to display to potential bidders.

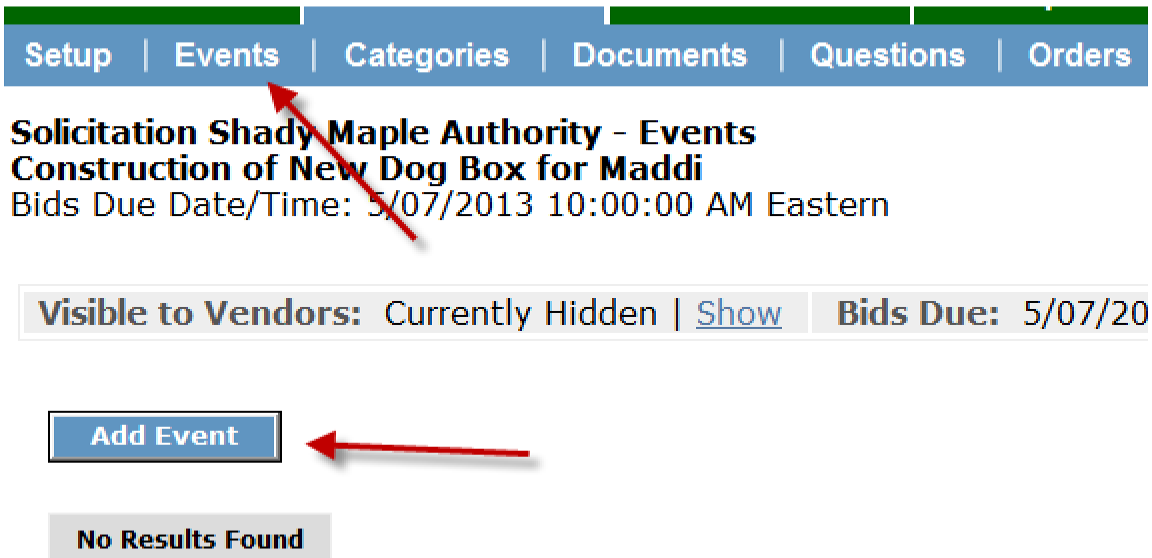
## Setup

| | |
|---|---|
| **Undeliverable Messages** *(for the last 7 days)* | 0 |
| **Bids Received** | 0 |
| **Last Edited By** | AAA The PennBid Team (1/29/2013 10:30:41 AM Eastern) |
| **Status Override** | Open |
| **Number** | Shady Maple Authority |
| **Title** | Construction of New Dog Box for Maddi |
| **Bids Due Date** | 5/07/2013 |
| **Bids Due Time** | 10:00 AM |
| **Time Zone** | Eastern |
| **Contact** | AAA The PennBid Team |
| **Project Manager** | None |
| **Type** | Fixed Fee Contract |
| **Description** | **Shady Maple Authority is soliciting sealed bids for the d** |
| **Internal Comments** | |

Edit

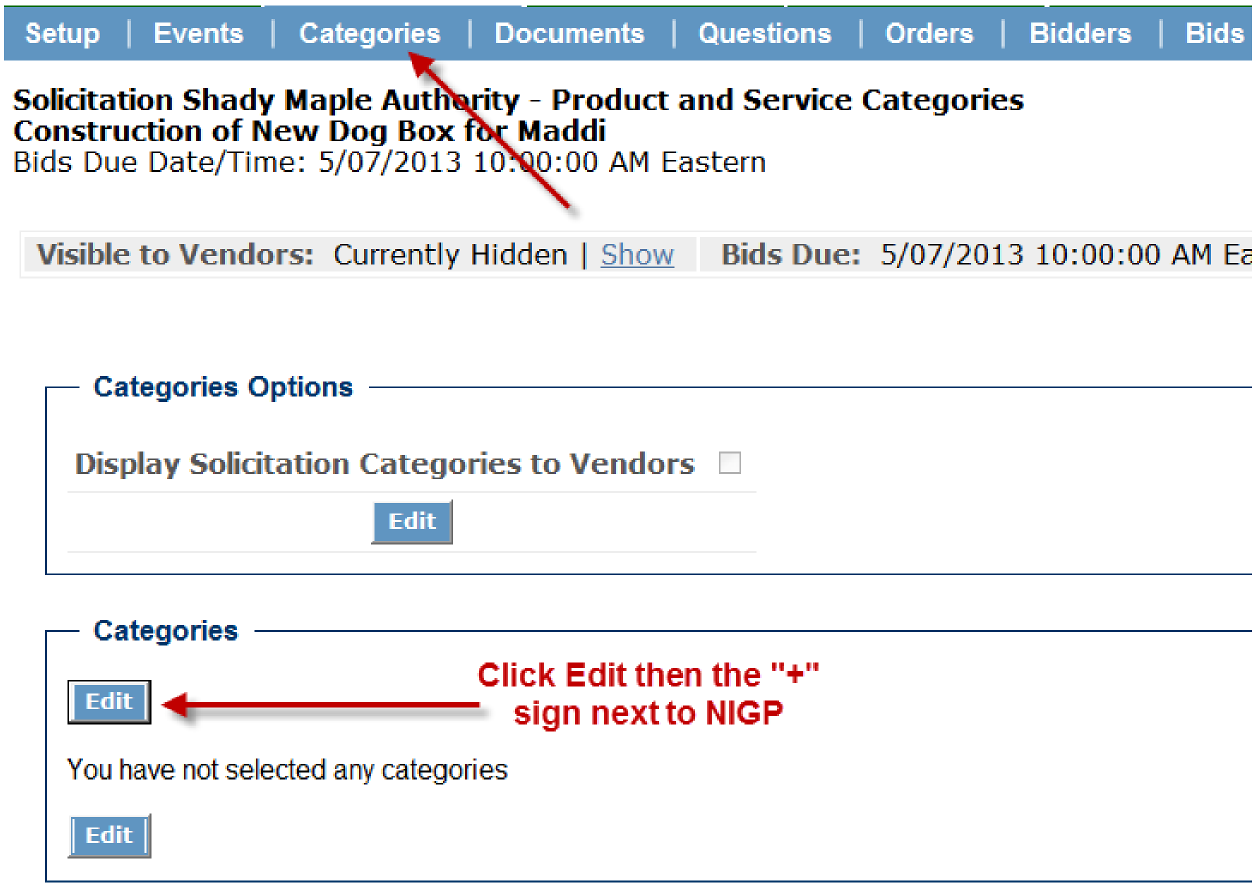
## Events

Events such as prebid meeting can be added by clicking the **Events** > **Add Events** buttons. This information will be on the very first screen that greets the bidders.



# Categories

Adding **Category** Codes related to the products or services that you are seeking enables automatic notification to all or some of the potential bidders. This is an optional but very powerful function.



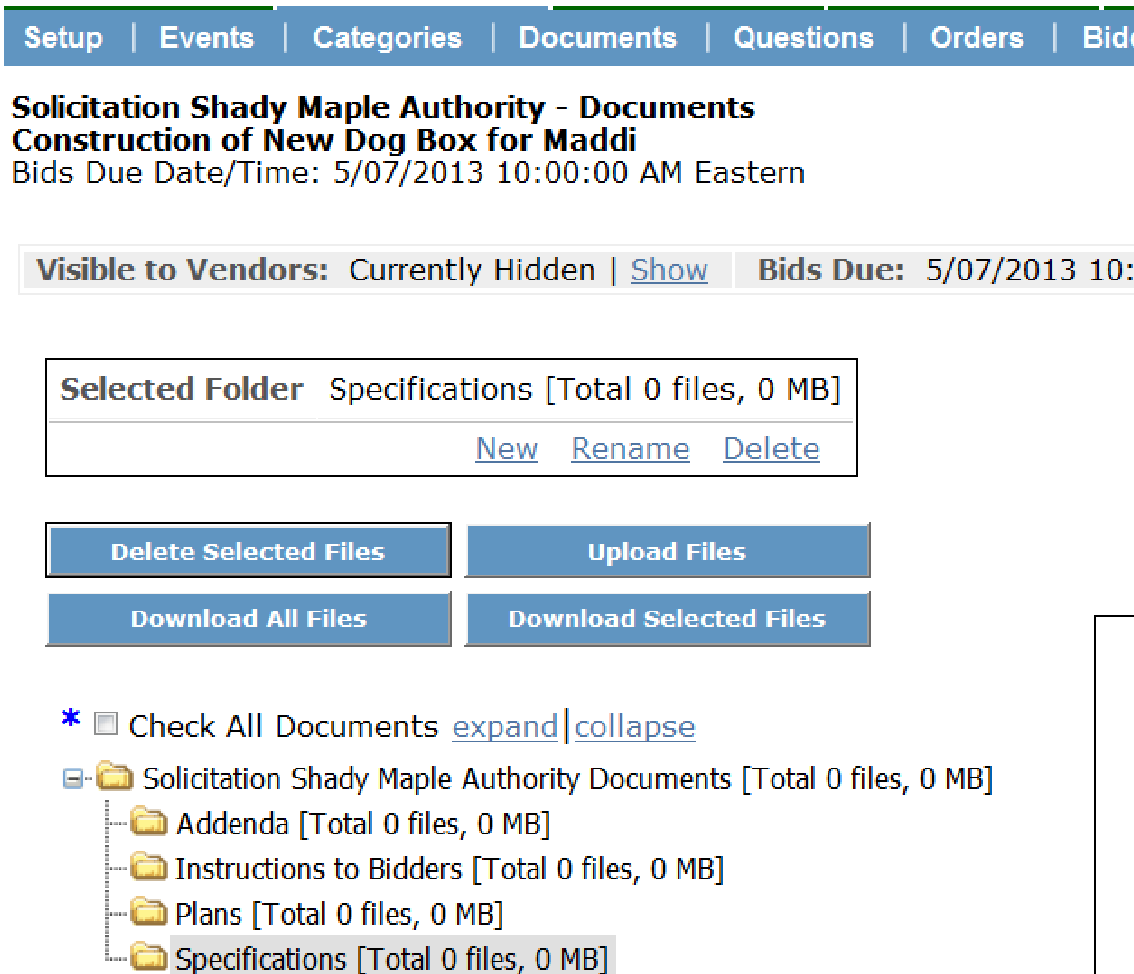

Scroll down the list and select the products (top of list) or services (lower half of list) related to your bid by putting a check in the box(es).

When finished, click 

## Documents – Adding Your Project Documents

Several document folder types are available and can be selected. eBid Systems utilizes an open architecture in which you can change folder names, add new folders, and add subfolders.

It is recommended that you develop the folder structure before documents are uploaded.




**To Add a sub-folder, click on the folder then "New"**

**You can also rename folders by clicking on folder then "Rename"**

## Documents

### Uploading (Adding) Documents

There are two ways to add your documents:

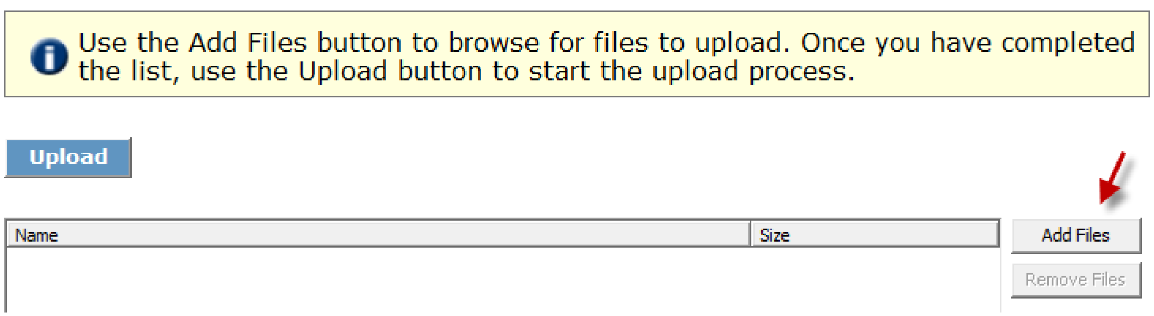
- Using the Add Files button
- Drag and Drop

### <u>Method 1 – Using the Add Files Button</u>

Select the folder and click **Upload Files**. The "**Add Files**" button will appear as seen below. Use the Add Files button and select the documents to be uploaded.

**Important Note** – To upload files, you must use Internet Explorer

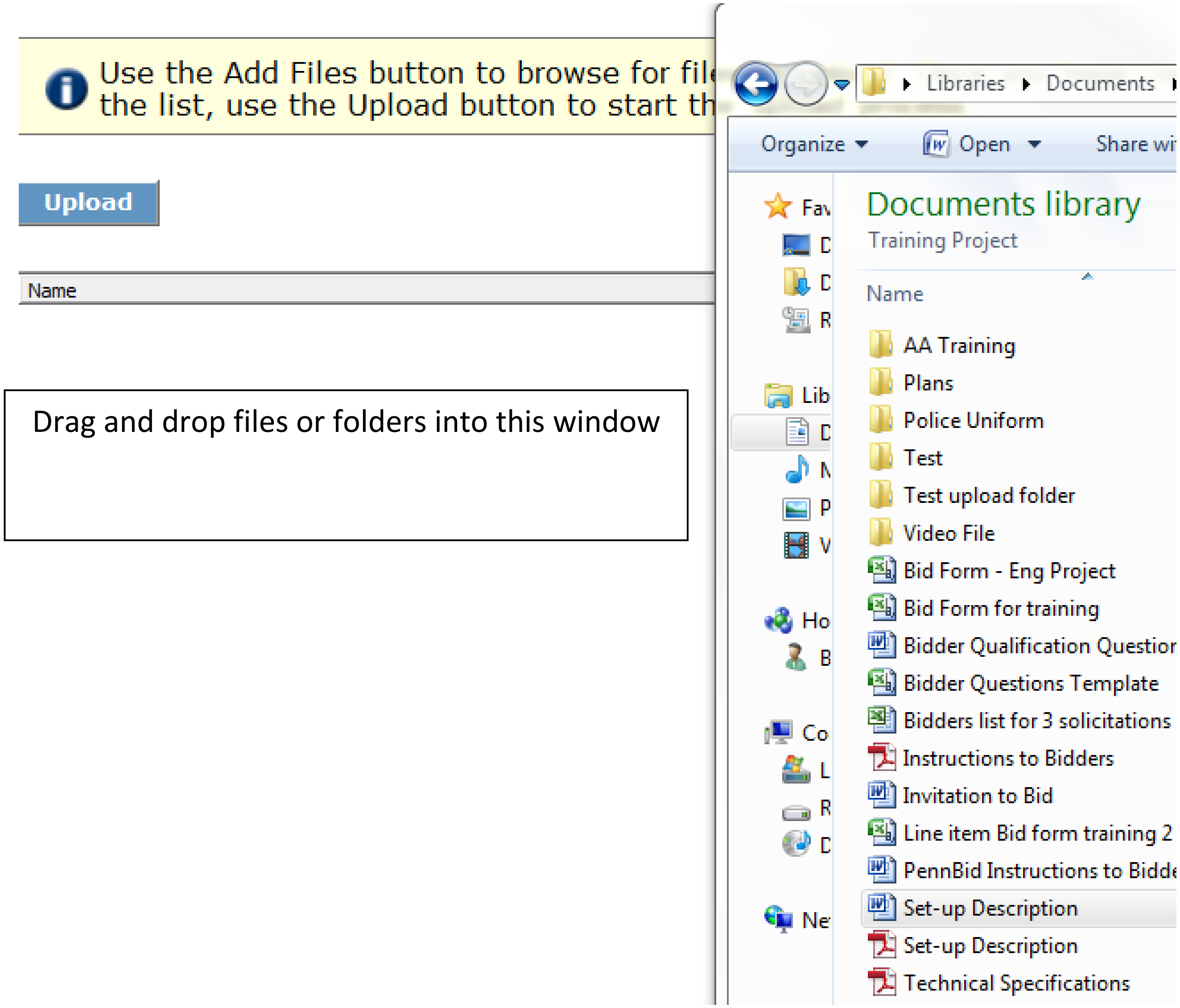
**Important Note** – If the Add Files button did not appear, check to see if there is a pop up asking to install Active X controls. If so, allow the program to be installed.



# Documents

## Method 2 – Drag and Drop

Select the folder and click **Upload Files**.  Open the Documents window on your computer.

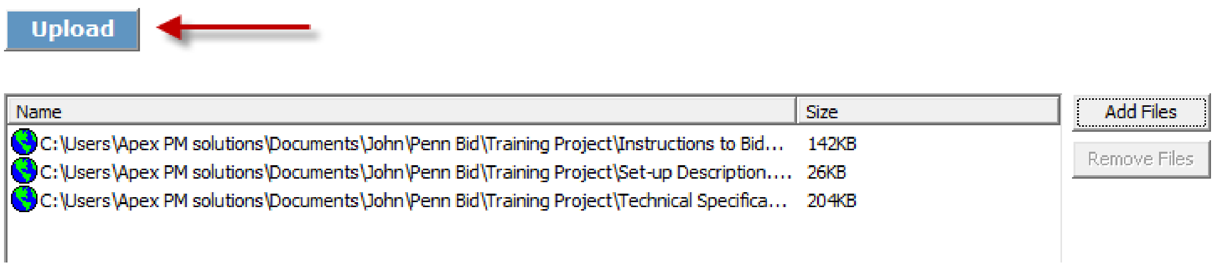


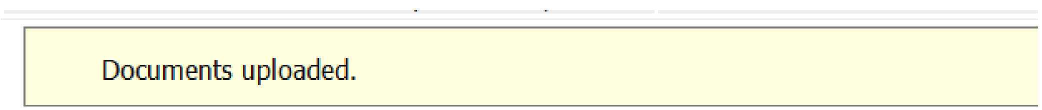

**Select the desired documents and/or folders and drag and drop into the Program files window.**

**NOTE – If a folder is selected, all files within the folder will be copied.**

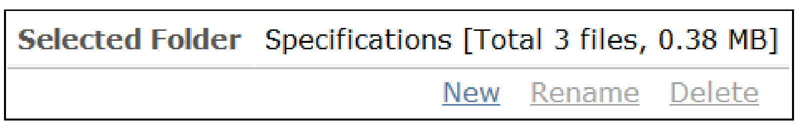
# Documents

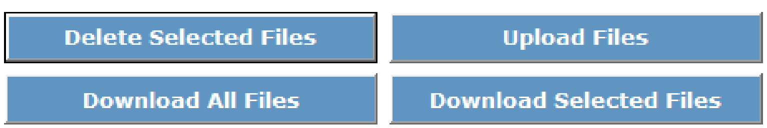
Once the desired files have been added, click **Upload**

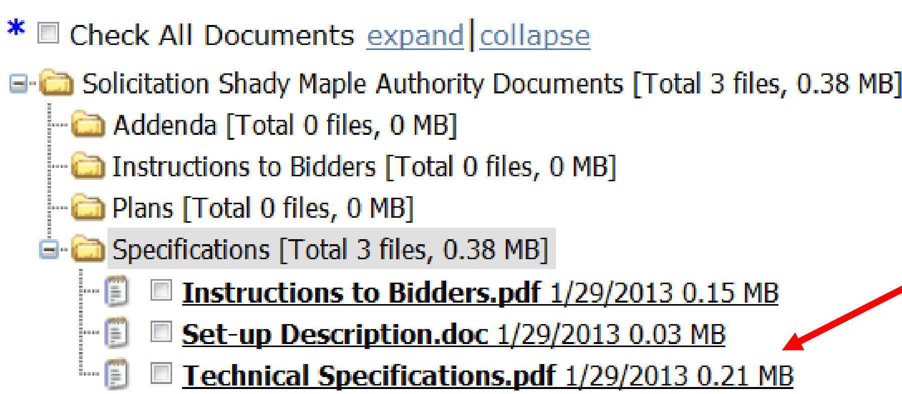



**Important Note 3** – Folder names are **not** displayed to potential bidders until the folder contains at least one document file.



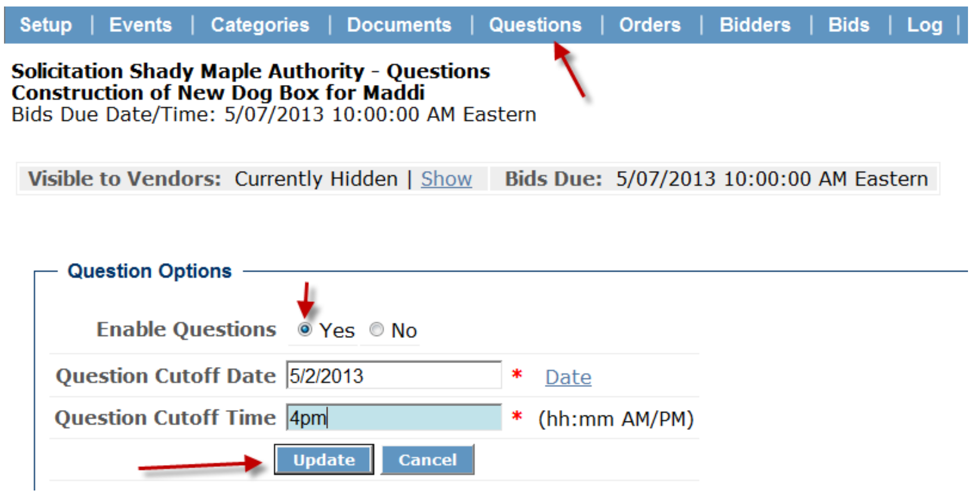

**Viewing Uploaded Documents** - To view a document, just click on it.

**Removing Documents** – To remove documents, put a check in the box next to the documents name and click **Delete Selected Files**.

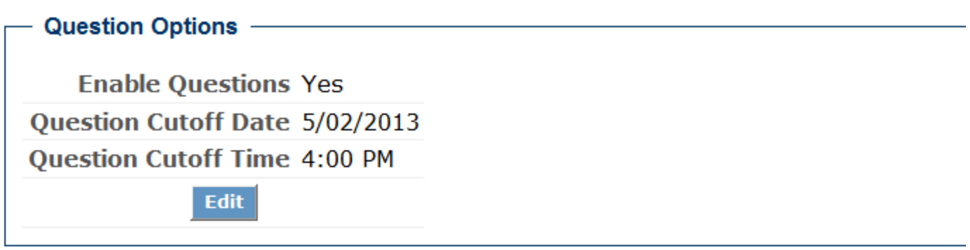

- Enabling the questions tab will permit the potential bidders to submit questions electronically through the system. When a question is asked, two things happen;

1. The question is recorded and is kept as part of the overall solicitation **Log**.
2. The question is automatically sent via email to the posting agency or person.

To Enable **Questions**, click the **Questions** tab (top blue bar) > **Edit**, and populate fields as shown below.



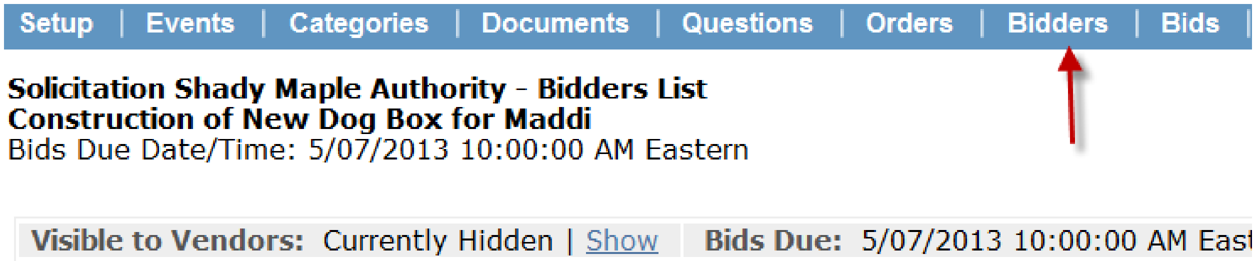

Once complete, click **Update**.

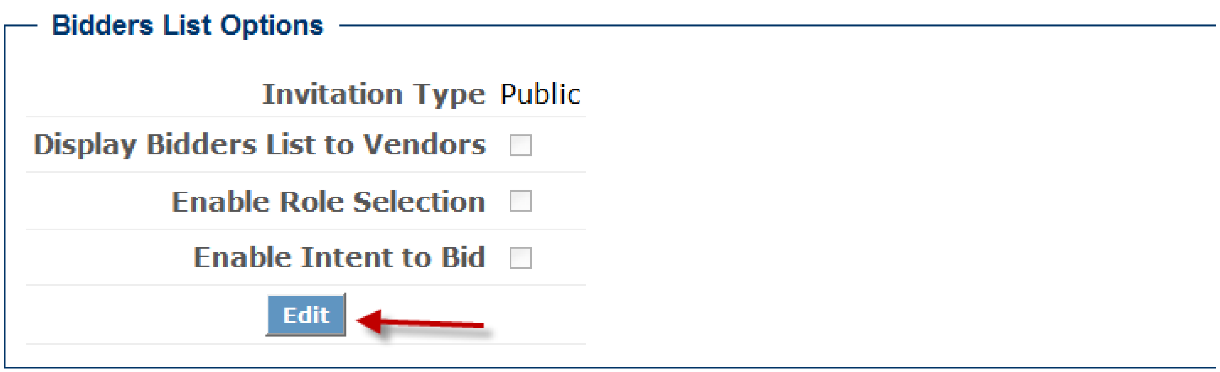



Bidders are permitted to ask questions until the **Question Cutoff Date and Time**.

- The Bidders tab has several optional and helpful features.

Click **Bidders** then **Edit**. Select which features you would like turned on and click **Update**.




## Bidders List Options

- **Displaying Bidders List** displays the Bidders / Planholders list publically
- **Role selection** – when enabled, the system will ask potential bidders what their role is for this bid – Prime Contractor, Sub Contractor, Vendor, or Other.
- **Intent to Bid** – when enabled, the system will ask potential bidder if they intend to bid. If they choose to answer, they can select “Will Bid”, “No Bid”, or “Undecided”.

Bidders

**Important Note** – Potential Bidders Do Not have to answer the Role Selection or Intent to Bid Questions. Whether they answer or not does not affect their ability to bid.

**By Invitation Only** – If you do not want the bid to be public and desire only those bidders you invite, the Invitation Type can be changed to "**Private – By Invitation Only**"

# Bids

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:

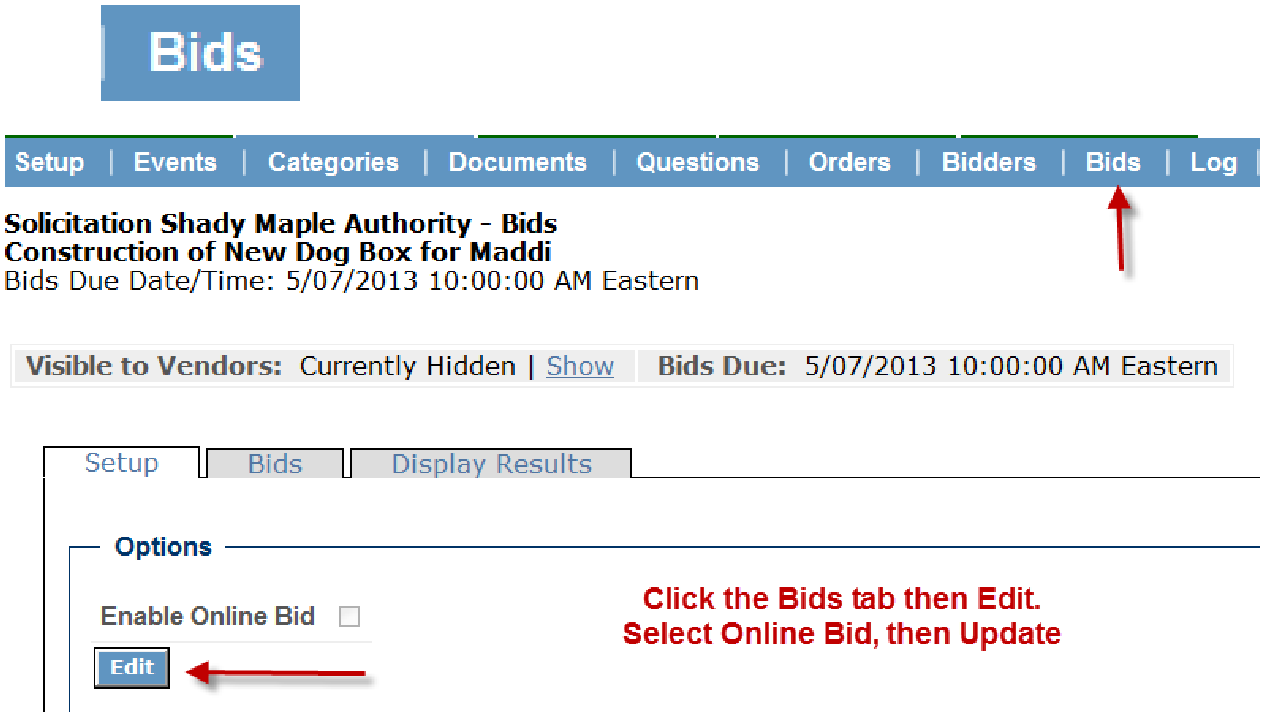
1. The actual bid pricing or proposal document,
2. Questions or statements that bidders must acknowledge or respond to prior to submitting their bid. We call these "**RFIs**"
3. Supporting Documents to be submitted with Bid – Bid Bonds, non-collusion affidavits, ect.

**Types of Bids** – allows various types of bids.

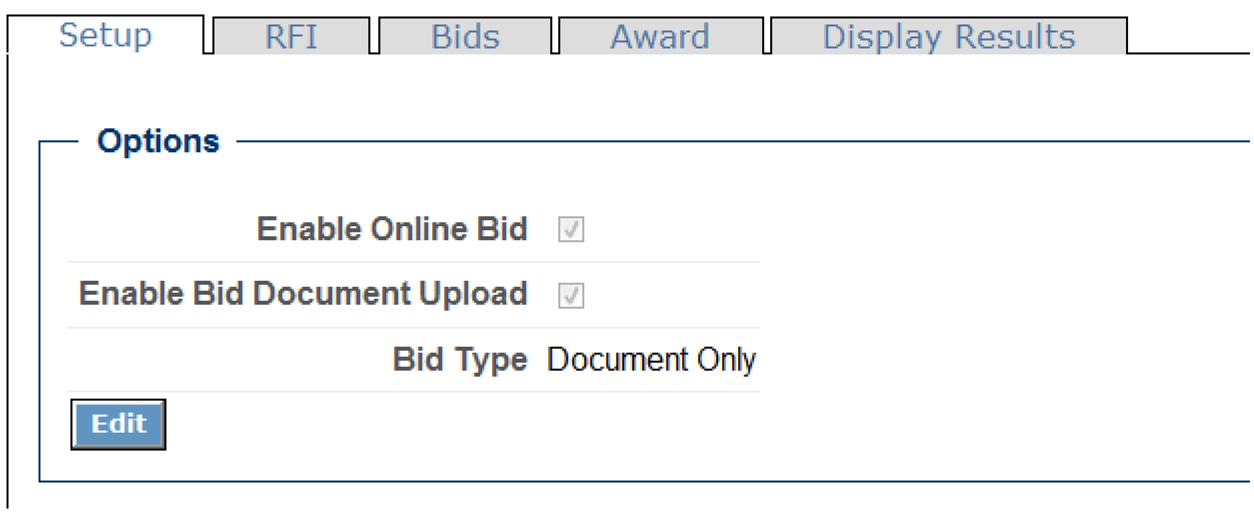
- **Documents Only** – These are proposals, mostly used for professional contracts
- **Lump Sum** – Just one price to provide the products or services outlined in the specifications
- **Line Item** – By far the most common. Line item bids present individual items that must be bid on (called Schedule 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

# Adding a New Solicitation

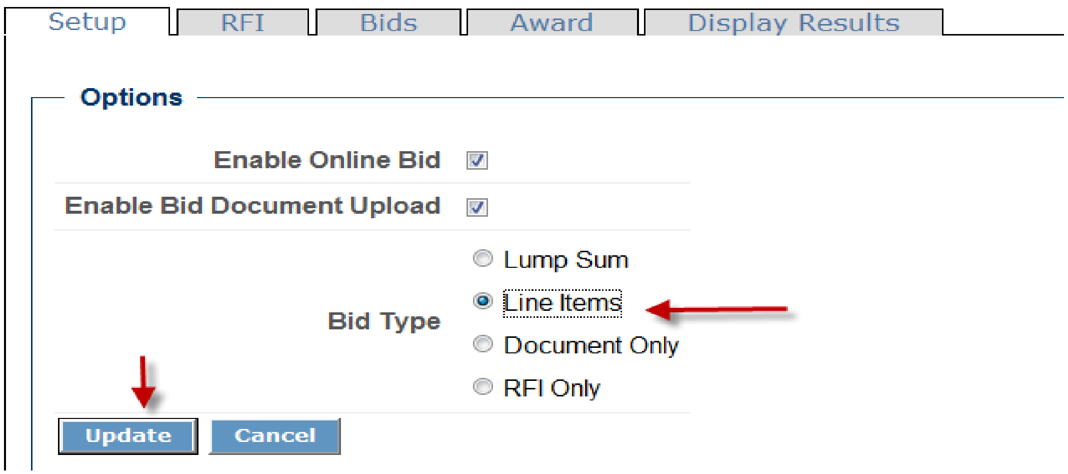



By default, the Program is set to "Document Only" (a proposal without online pricing)

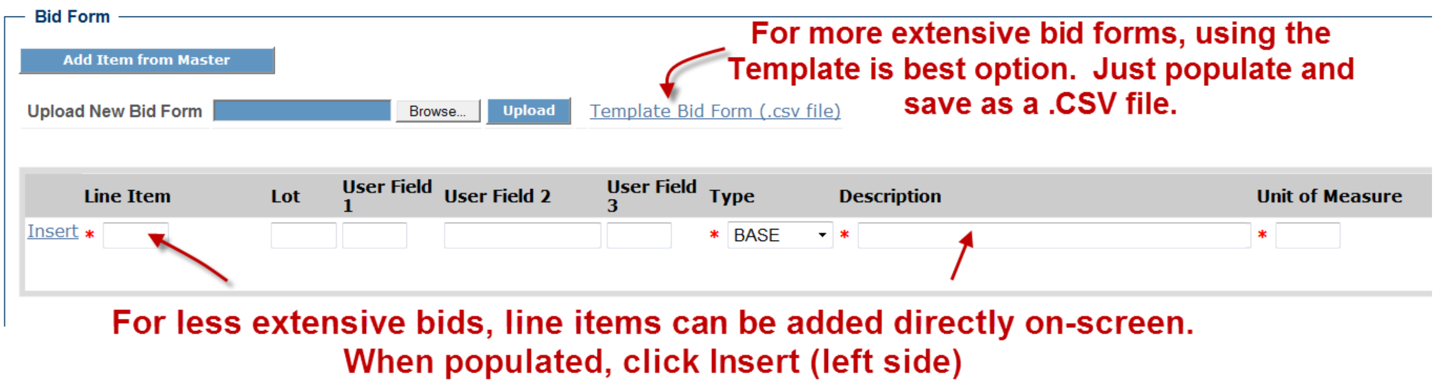


# Bids

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



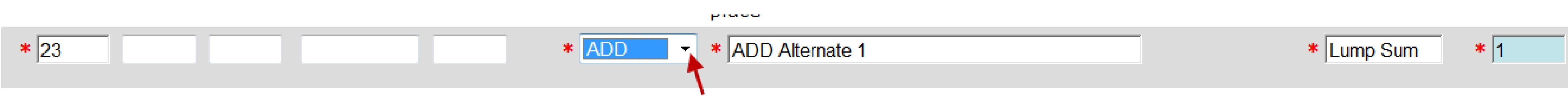

Here is view of Line Item Bid set-up.



# Bids

**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.



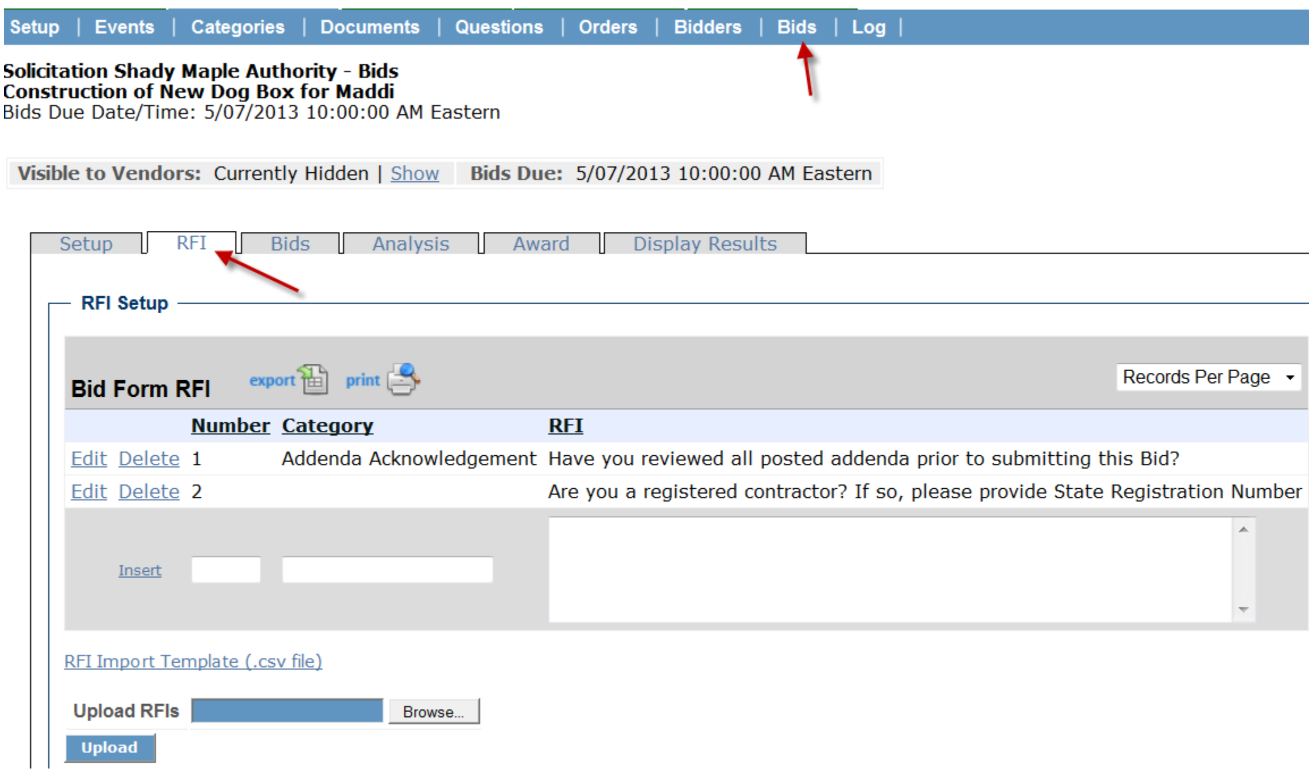

Select from drop Down for Base, ADD Alternate, and Deduct Alternate

**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

# Bids

## 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**.




**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.

# Going Live!!!

Now that your solicitation is ready, just click Show from any screen to display to potential Bidders.

**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

# "Cloning" – a time saving feature

## Multi-Prime Solicitations

There are several ways to set up a multi-prime project. Described here is the most used.

**Step 1** – Set up a single solicitation including **all** documents and options.

**Step 2** – Click on the **Solicitations** tab at the top of the screen.

**Step 3** – **Cloning** - Click the "**Clone**" button next to the solicitation name

| | | | | | | |
|---|---|---|---|---|---|---|
| View | Clone | Delete | Shady Maple Authority | Open | Line Items | Construction of New Dog Box for Maddi |

**Step 4** – Select clone features and click **Clone Solicitation**

**Clone Configuration**

In addition to cloning solicitation setup, please select additional features you would like to clone.

| | | |
|---|---|---|
| Clone Categories | (•) Yes | ( ) No |
| Clone Bidders List | ( ) Yes | (•) No |
| Clone Bids Options | (•) Yes | ( ) No |
| Clone Documents | (•) Yes | ( ) No |

Clone Solicitation | Cancel

A “New” solicitation is produced, including all documents and bid options

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

**Visible to Vendors:** Currently Hidden | Show **Bids Due:** 5/07/2013

Your solicitation has been successfully cloned.

**Step 5** – Adjust solicitation titles (Click **Edit** from **Setup** tab) and upload the bid forms for each prime (**Bids** tab)

**Finished view of project with two prime contracts.**

| | | | | | | |
|---|---|---|---|---|---|---|
| View | Clone | Delete | Shady Maple Authority | Open | Line Items | General Construction of New Dog Box for Maddi |
| View | Clone | Delete | Shady Maple Authority | Open | Line Items | Electrial Construction of New Dog Box for Maddi |

# Periodic Solicitations and Re-biding

Use the steps described above to “**Clone**” previous solicitations. Make any minor adjustments (due date, question cut off, documents, ect) and you are ready to display to potential bidders.

## Questions - Answering Bidders Questions

When Bidders ask questions, a couple of things happen:

1. The Program records the question within your solicitation
2. The question is emailed to the posting Agency or User

When you click the **Questions** tab from the Feature Bar, scrolling down will reveal all questions. From the posting Users perspective, you can also see who asked the questions.

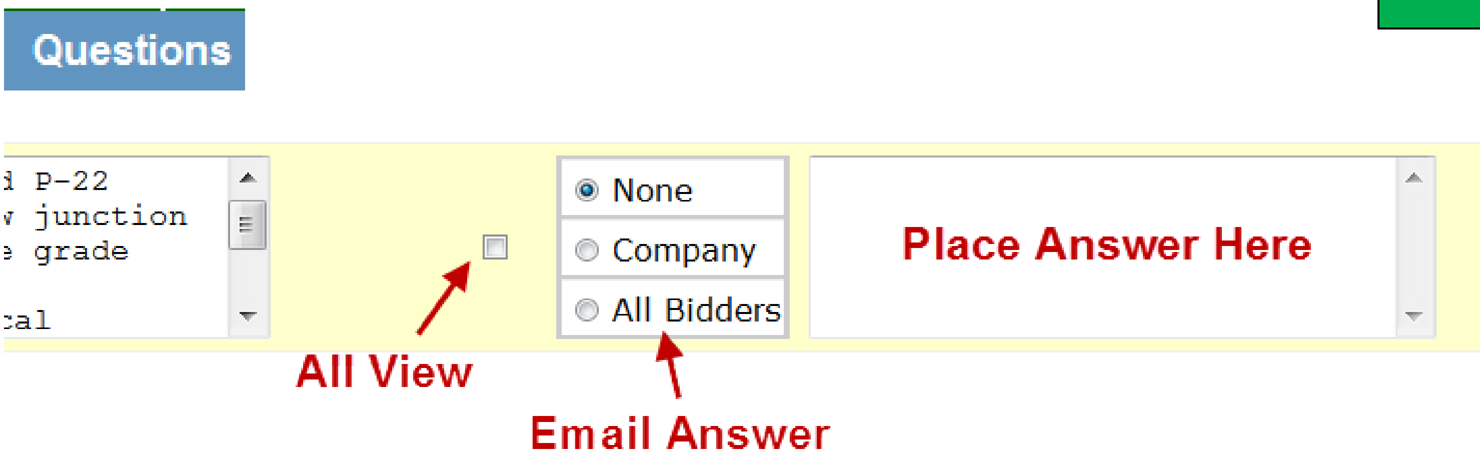
**Important Note** – From the Bidders perspective, the name of companies who ask questions are **NOT** displayed publically.

| | Bidder | Question Date | Question | All View | Email Answer | Answer |
|---|---|---|---|---|---|---|
| Edit Delete | Robert P. Lepley Electrical Contractor | 01/29/2013 11:24 AM | P-2 Influent PS and P-22 Sludge PS both show junction boxes mounted above grade with the following note, "see electrical drawings for junction box details". There are no junction box details on the electrical drawings. | | | None |

To respond to a question, click **Edit**.

Answer the question within the box provided (cut and paste works well) and make selections for "**All View**" and "**Email Answer**" (see note below)

- **All View** – Will publically display the Question and Answer for all Bidders. We recommend that this box is always checked for public solicitations.
- **Email Answer** – The Program will also email the question and answer to just the company who asked questions (recommended) or to your entire Bidders List (not recommended).




Click **Update** on left side of screen.

# Bidders

The **Bidders** tab is used to manage your bidders list and for communicating with your potential bidders.

The Bidders List is auto-populating, meaning that there is no interaction required between the posting User and the potential bidders to have them included on the list. Bidders who have enough interest in your solicitation to have either downloaded documents or asked questions are automatically added to the list.

To review the list, click **Bidders** from the top bar and scroll down.

The list can be sorted by clicking any underlined heading

See Note Below

| Company | Contact | Categories | Sub-Categories | Vendor Role | Intent | D | O | Q | B |
|---|---|---|---|---|---|---|---|---|---|
| DH Funk & Sons LLC | Email - Nathaniel Funk | 0 | 914 | Prime Contractor | will bid | D | | Q | B |
| DOLI Construction Corporation | Email - Keith Hass | 0 | | | --none-- | D | O | | B |
| J.A. Myers Building & Development, Inc. | Email - Jeff Stough | 0 | 155, 890, 912, 913, 914 | Prime Contractor | will bid | D | | Q | B |

To reveal details about potential bidders, just click the company's name

On the right side of the Bidders List you will see several letters, each corresponding to actions taken by this particular bidder.

- "**D**" – They have downloaded your documents
- "**Q**" – They have asked a question
- "**B**" – They have submitted a bid

## Bidders

Clicking on a company's name will provide details about that company

| | |
|---|---|
| **Company Name** | J.A. Myers Building & Development, Inc. |
| **Company Website (URL)** | www.jamyershomes.com |
| **Country** | United States |
| **Address1** | 160 Ram Drive |
| **Address2** | |
| **City** | Hanover |
| **State/Province** | Pennsylvania |
| **Zip/Postal Code** | 17331 |
| **Phone** | 717-632-9406 |
| **Fax** | 717-632-6674 |

**Contacts** export print Records Per Page

| | Name | Permission | Title | Phone | Fax | Opt Out | Email Address |
|---|---|---|---|---|---|---|---|
| View | Jeff Stough | Company Administrator | Estimator | 717-632-9406 | 717-632-6674 | ☐ | jstough@jamyershomes.com |

## Communicating with Bidders

Communicating with potential bidders is very easy and fast.  This feature is especially valuable when Issuing Addenda.

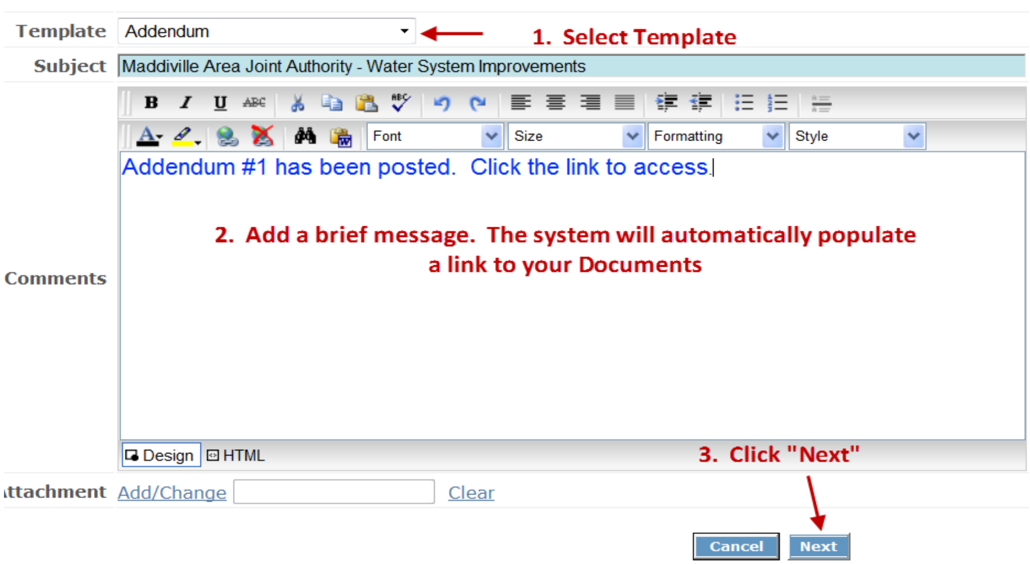
From the **Bidders** tab (top bar), scroll down.  You will see several radio buttons for your desired action.

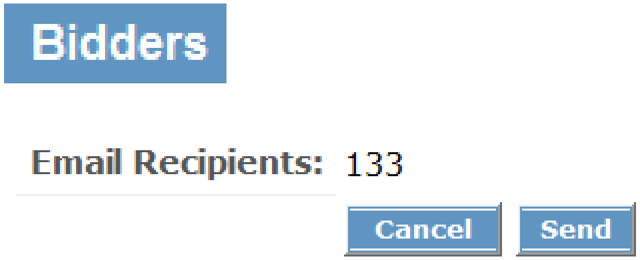

**Notify Selected** – From your bidders list, place a check in the box net to each bidder you would like to send a message to and click **Notify Selected**.

**Notify All** – By far the most common.  When issuing Addenda or a General Message, just click **Notify All**

**Notify By Category** – Used as an Invitation to Bid and will send your message to all potential bidders in the Categories you selected.

Example of Issuing Addenda - Click **Notify All**.  The box below will appear.

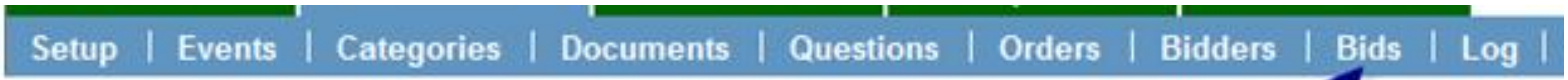





4. Click Send

Your message will be sent to all Bidders and you will receive a copy of what was sent.

# Bids




All functions dealing with the Bid Opening, Receipt of Bids, and Displaying results start by clicking the Bids tab. then ...

Bids - Summary of Base Bids and attached Bid Documents. This is usually used for Bid Openings

Display Results - see below to


RFI - Responses to Questions and

Analysis - Bid tabulation provided in several ways, including comparison to estimates. Also includes Alternates, ADDS, and Deducts

# Bids

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

**Summary Level of Bid Results** – The small Bids tab reveals a summary level of bid results. Most often used for Bid Opening.

| | Company | Last Edited By | Total Bid | Bid Date | Bid Receipt Number | Bid Document | Bid Status |
|---|---|---|---|---|---|---|---|
| View | Trinity Excavating, Inc. | Brian Meyer | $720,920.41 | 2/07/2013 1:56:01 PM | 500055176 | EB BID DOCS.pdf | Complete |
| View | DH Funk & Sons LLC | Nathaniel Funk | $697,318.18 | 2/07/2013 10:53:03 AM | 500055097 | Bid Requirements.zip | Complete |
| View | J.A. Myers Building & Development, Inc. | Jeff Stough | $661,376.16 | 2/07/2013 1:54:27 PM | 500055174 | Total Bid Docs.pdf | Complete |
| View | Performance Construction Services, Inc. | Dean Phelps | $646,874.00 | 2/07/2013 1:52:23 PM | 500055172 | Bidding Documents with Signatures.pdf | Complete |

"View" will display everything (unit, extended, & total prices) submitted by this particular bidder. You can copy and paste directly into your Word Award document.

Total Base Bid Only

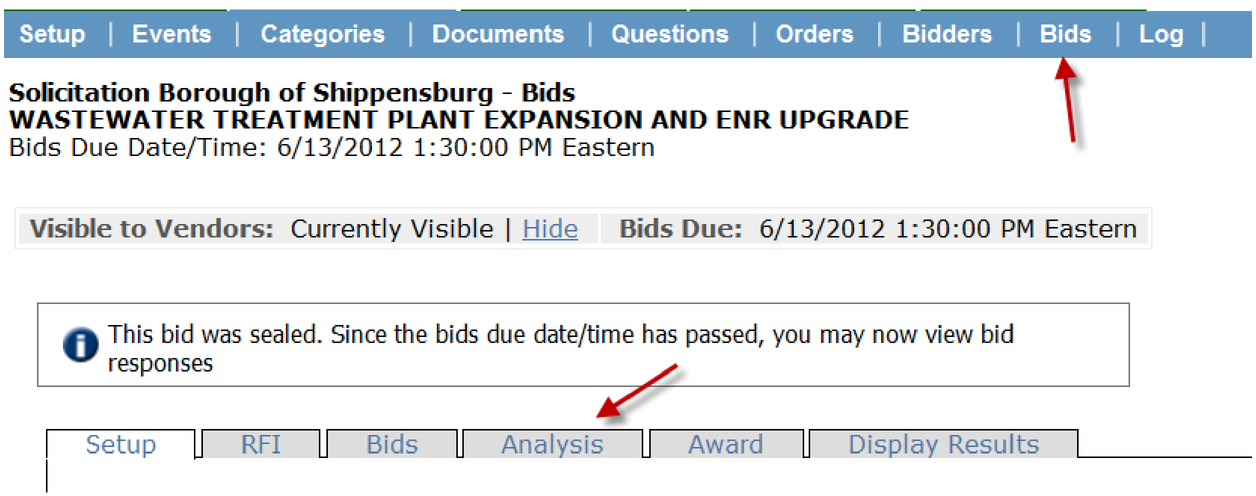
Bidder's Support Documents (Bonds, affidavits, ect)

# Bid Tabulation

At bid opening, several types of tabulated bid results are available for review, regardless of the number of line items or number of bidders. Similar to many Program features, the tabulated bid results can be downloaded as an Excel file directly to your desktop.

## Accessing Bid Tabulation Details

1. Click **Bids** (top blue bar) then the **Analysis** tab.




2. Select how you would like to see the results (**All Line Items** or **Cross-Tabulation by Vendor**)

# Bids


3. Selecting **Cross-Tabulation by Vendor** provides a summary level tabulation including all line items and each bidders extended line prices. The Yellow highlighting indicates the low price for that line item. The Program will automatically position the bidders with lowest base bid on the left, followed by second lowest and so on.

   **Cross-Tabulation by Vendor** is often the best comparative tabulation.

## Bids

**Bid Analysis to Estimate** export print

All Data can be exported directly to Excel

| Line Item | User Field 1 | User Field 3 | Type | Description | Unit Of Measure | Quantity | Extended Estimate Price | Estimate Source | PACT TWO LLC | Quandel Construction Group, Inc. | Wickershar Constructio and Engineerin Inc |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | | | BASE | All Work described in the Drawings and Specifications, but not including work required by Items 2 through 29 | Lump Sum | 1.0000 | | | **$10,150,000.00** | **$10,507,700.00** | **$11,211,44** |
| 2 | | Quantity Adjustments | BASE | Miscellaneous Unclassified Excavation | CY | 100.0000 | | | **$4,000.00** | **$26,200.00** | **$26,38** |
| 3 | | | BASE | Miscellaneous Aggregate Backfill | CY | 100.0000 | | | **$3,500.00** | **$2,600.00** | **$2,62** |
| 4 | | | BASE | Miscellaneous Concrete | CY | 10.0000 | | | **$6,000.00** | **$1,330.00** | **$5,25** |

★ **Important Note** – The “export” icon available on most screens will export the grid information directly to your desktop as an Excel file.

4. Selecting **All Line Items** Provides side by side comparison of all line items, unit costs, and extended pricing.

# Bids

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

<< Back

**All Line Items** export print

Data can be exported to Excel

Data can be sorted by any field that is underlined

Record

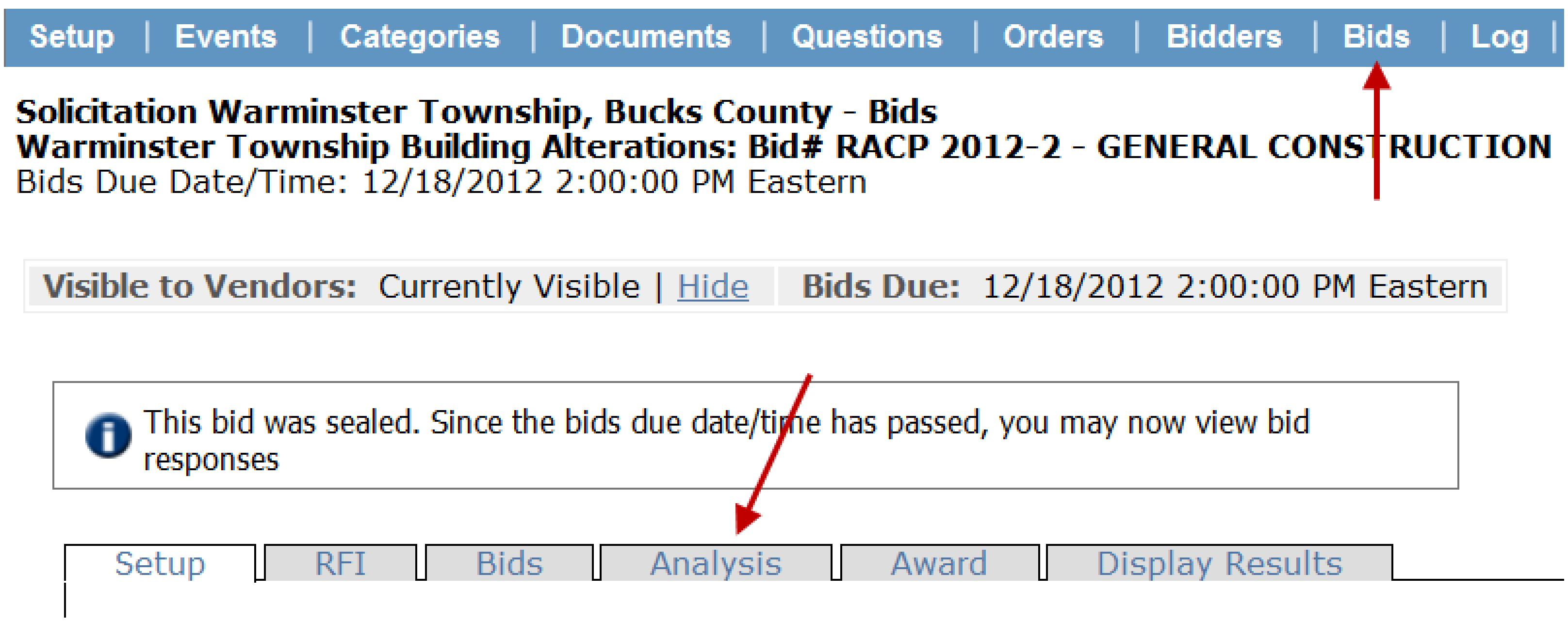
| Line Item | User Field 1 | User Field 3 | Description | Type | Unit Of Measure | Quantity | Company | Item Bid | Extended Bid |
|---|---|---|---|---|---|---|---|---|---|
| 1 | | | All Work described in the Drawings and Specifications, but not including work required by Items 2 through 29 | BASE | Lump Sum | 1.0000 | Alvarez Contractors, Inc. | $15,160,288.0000 | $15,160,288.00 |
| 1 | | | All Work described in the Drawings and Specifications, but not including work required by Items 2 through 29 | BASE | Lump Sum | 1.0000 | Conewago Enterprises, Inc. | $11,667,146.0000 | $11,667,146.00 |
| 1 | | | All Work described in the Drawings and Specifications, but not including work required by Items 2 through 29 | BASE | Lump Sum | 1.0000 | G.M. McCrossin, Inc. | $11,208,636.0000 | $11,208,636.00 |

Bids

## Bid Award Feature

When a bid has been awarded, a few steps must be taken within the Program to change the status from “Pending Award” to “Awarded”.  This award information is always available for future reference.

1. The Award process begins by Clicking **Bids** (top blue bar) then the **Analysis** tab.




2. Select how you would like award and click **Apply**.  In this case, I selected **Award All Items to Selected Vendor**.  I selected the vendor.

# Bids

- Award to Single Vendor (Lowest total price for all items from a single vendor that bid all items)
- Split Award to Multiple Vendors (Award each item to vendor providing lowest non-zero price)
- Award All Items to Selected Vendor — The Fayette Group, Inc.
- Manually Select Awards

**Apply**

3. Clicking **Apply** will produce the following display. If this is correct, click **Award Selected**.

**Award Scenarios**

| | |
|---|---|
| Minimum total (base bid items) for single vendor that bid all items | $46,708.00 |
| Minimum total (non-zero base bid items) for multiple vendors | $46,708.00 |

**Award Selected**

**Totals by Company**

| Company | Base Bid Items | Alternate Items | Vendor Alt Items | Total Awarded Items |
|---|---|---|---|---|
| The Fayette Group, Inc. | $46,708.00 | | | $46,708.00 |

4. Don’t forget to include the **Award Date**. The status will not change to awarded without populating the date field.

Managing Your Solicitation

# Bids

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

**Award Date** 1/22/2013

## Award Total

export print

Records Per Page

| Company | Base Award | Alternate Award | Vendor Alternate Award | Award Total |
|---|---|---|---|---|
| The Fayette Group, Inc. | $46,708.00 | | | $46,708.00 |

## Awards

export print

| Line Item | Lot | User Field 1 | User Field 3 | Description | Company |
|---|---|---|---|---|---|
| 1 | | | Base Bid | Building Alterations – General Construction (excluding Alternates). Having examined in their entirety the Instructions to Bidders, the bidding documents and Contract Drawings and Specifications, and any addenda thereto, and all other documents comprising and hereafter collectively referred to as the Contract Documents for the Warminster Township Building Alterations – General Construction and having examined the sites of work and conditions affecting the work, the undersigned proposes and agrees to perform all labor and furnish all materials and equipment required to complete the named branch or contract work, in strict accordance with the Contract Documents and to your complete satisfaction and acceptance, for the amounts of; | The Fayette Group, Inc. |

Edit Awards

**Edits both the award items and the award date**

★ **Important Note – If awarding ADD or Deduct items, you must use Manually Select Awards in step 2**

★ **Important Note – Awarded values and quantities can always be modified by clicking Edit Awards.**