BID MANAGEMENT

What Is The Bid Management Feature?

The Bid Management tools allow you to create, populate, manage and publish bids for your vendors to interact with.

This feature allows you to:

- **Post bids online to the Virtual Bids & Plan Room.**
- **Associate bid drawings and files from Document Management with a bid.**
- **Associate one or more Bid Packages with a bid.**
- **Manage a list of contractors or vendors to participate in a private bid.**
- **Manage Questions and Answers.**
- **Publish Addenda.**
- **Manage submissions from the bid participants.**
- **Level and award bid packages.**

Using Projectmates Bid Manager / Virtual Bids & Plan Room, you can effortlessly publish and manage bids online. This tool allows you to publish projects for bid, include bid document files for online viewing, manage addenda, answer contractor questions, and receive electronic bids.

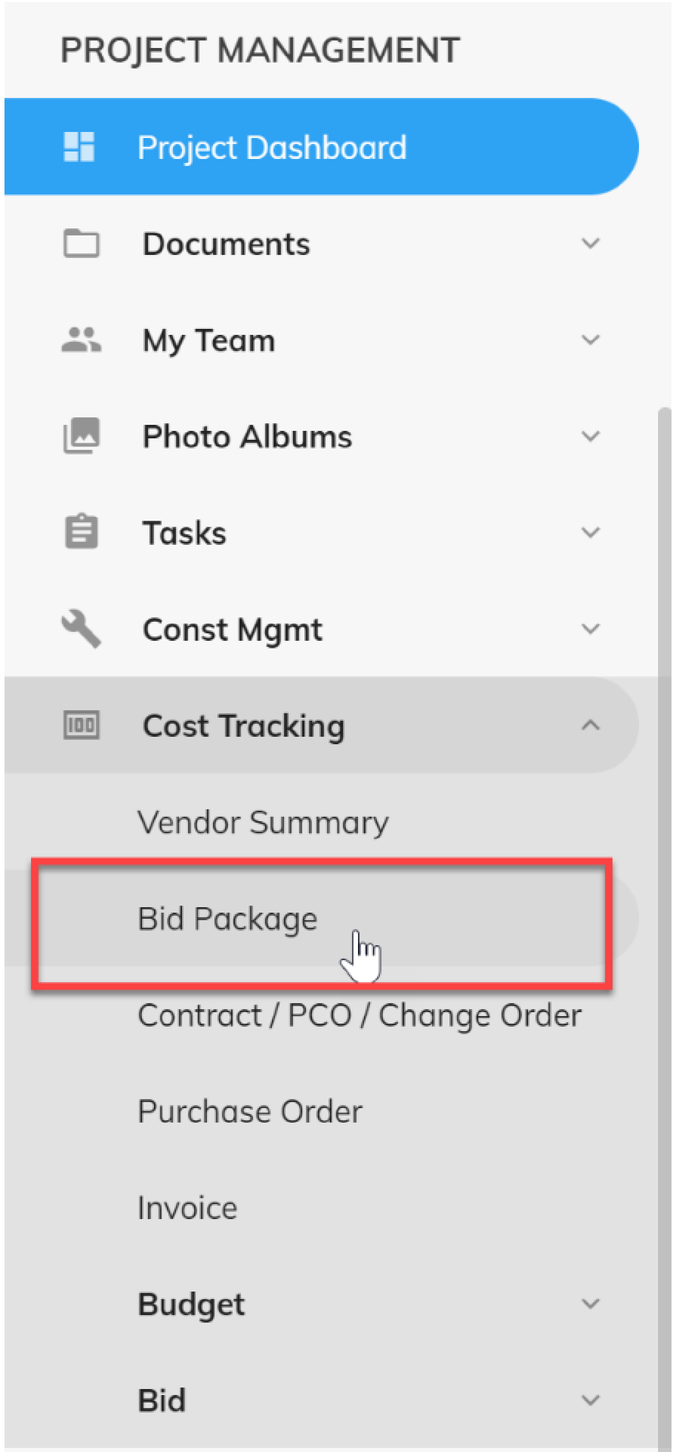
Bids can be configured to be either public or private depending on your organization. Contractors can be supplied a Projectmates login ID and password by the site administrator or can sign up for the Virtual Bids & Plan Room through a separate sign-up process. Contractors who want to participate in a bid can add published bids to their My Bids. My Bids entitles bidders to receive email notifications on addenda, Q&A responses, and bid

awards. The Bid Manager tools can support multiple bids per project, or bids with multiple phases.

Bid Package Navigation

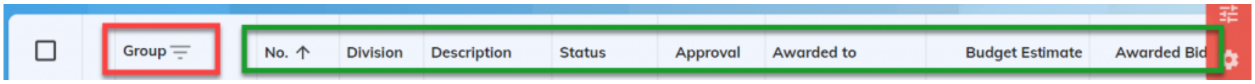
1. To view the Bid Package log page:

    a. Click on Cost Tracking in the navigation pane on the left side of your screen and then on Bid Package. This page will now display all the bid packages in the project.



2. **On the log page:**
    a. **You can filter all bid packages by Groups.**
    b. **To filter, click on the stacked line icon next to Groups and start typing to get smart prompts and make a selection.**

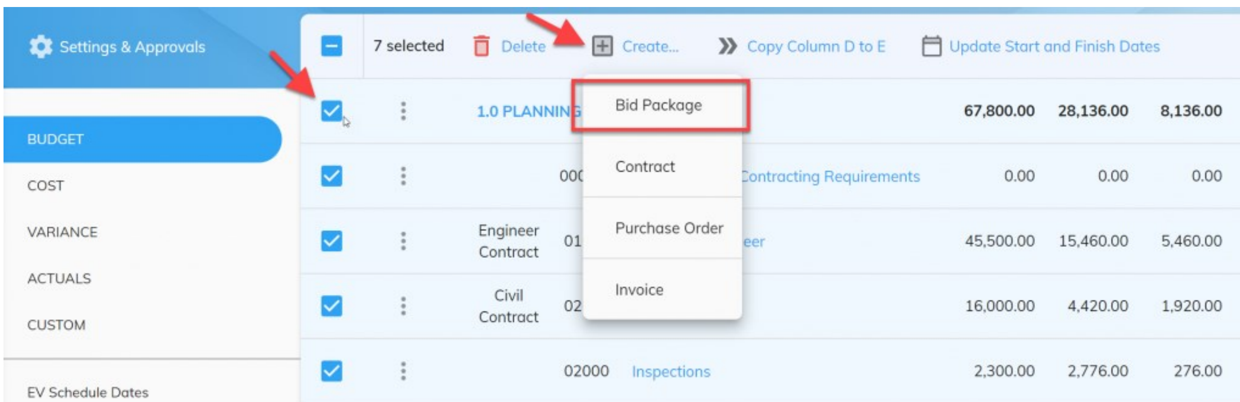
c. You can also sort all items by any of the fields like package No., Division, Status, Approval Status, etc. (Sorting fields outlined in Green).



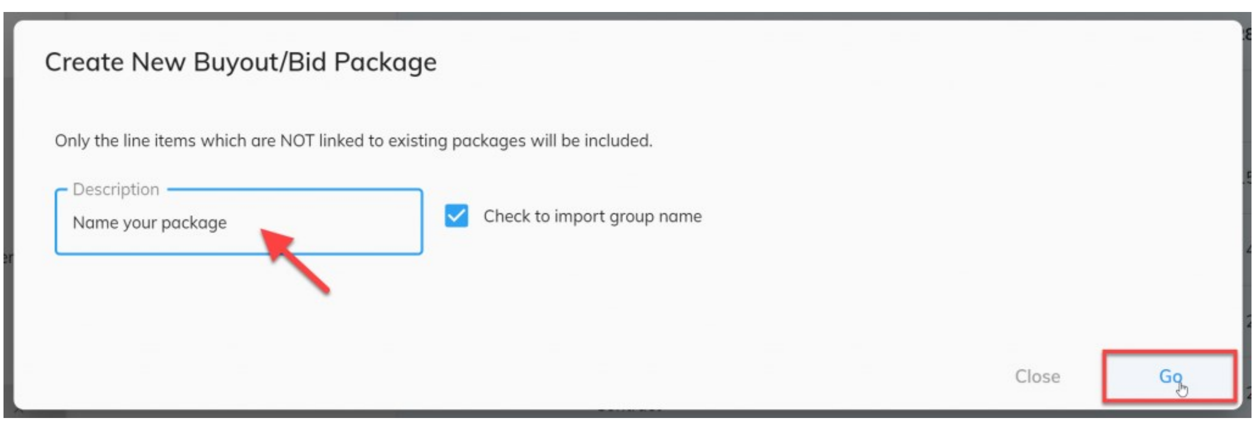
Creating Packages

Method One: Creating A Bid Package From Budget (Recommended)

1. Open your project budget and select the items you want to add to your Bid Package.
2. Click on + Create and select Bid Package from the drop down.

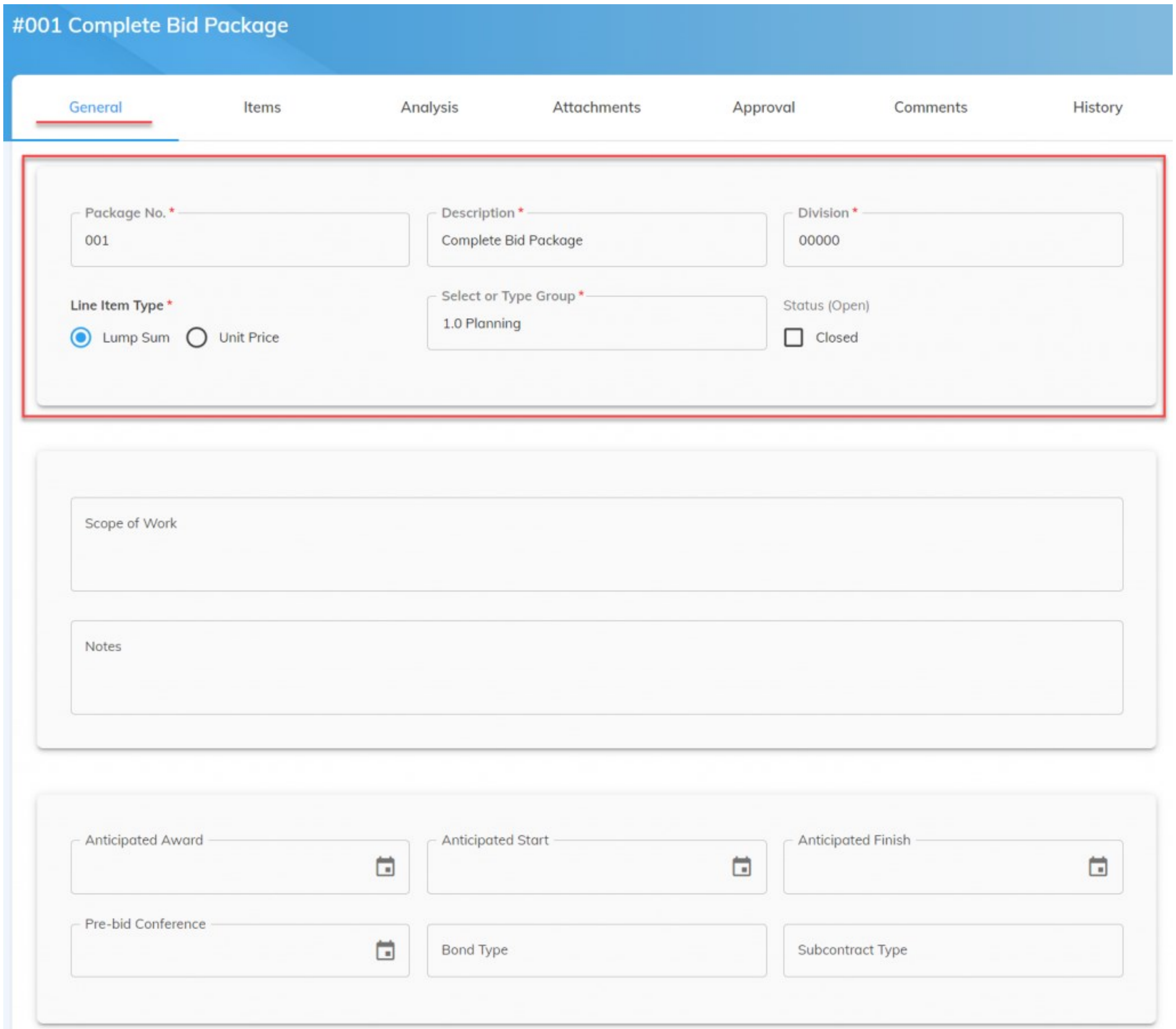


3. Add a name for this new Bid Package and click Go. You will now be taken to a new page to add additional information to this Bid Package.

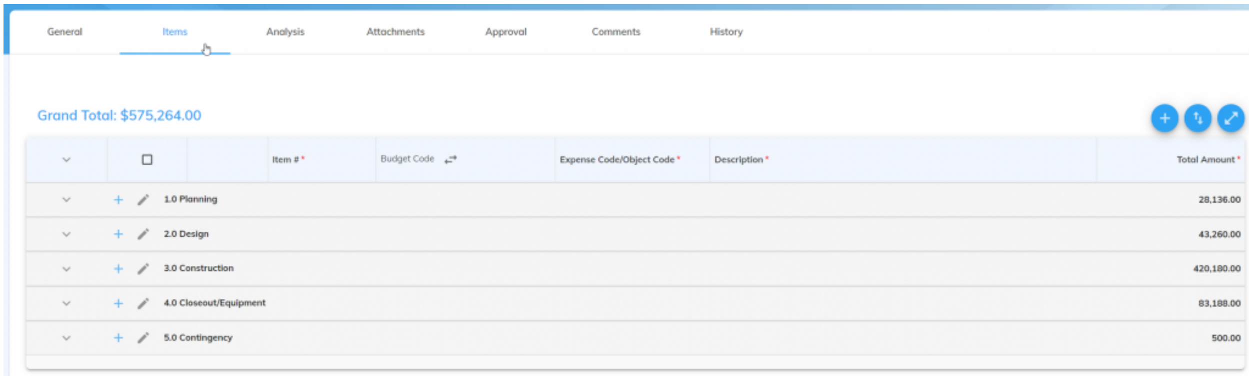


4. **Add information in the required fields (marked by red stars) in the General tab.**

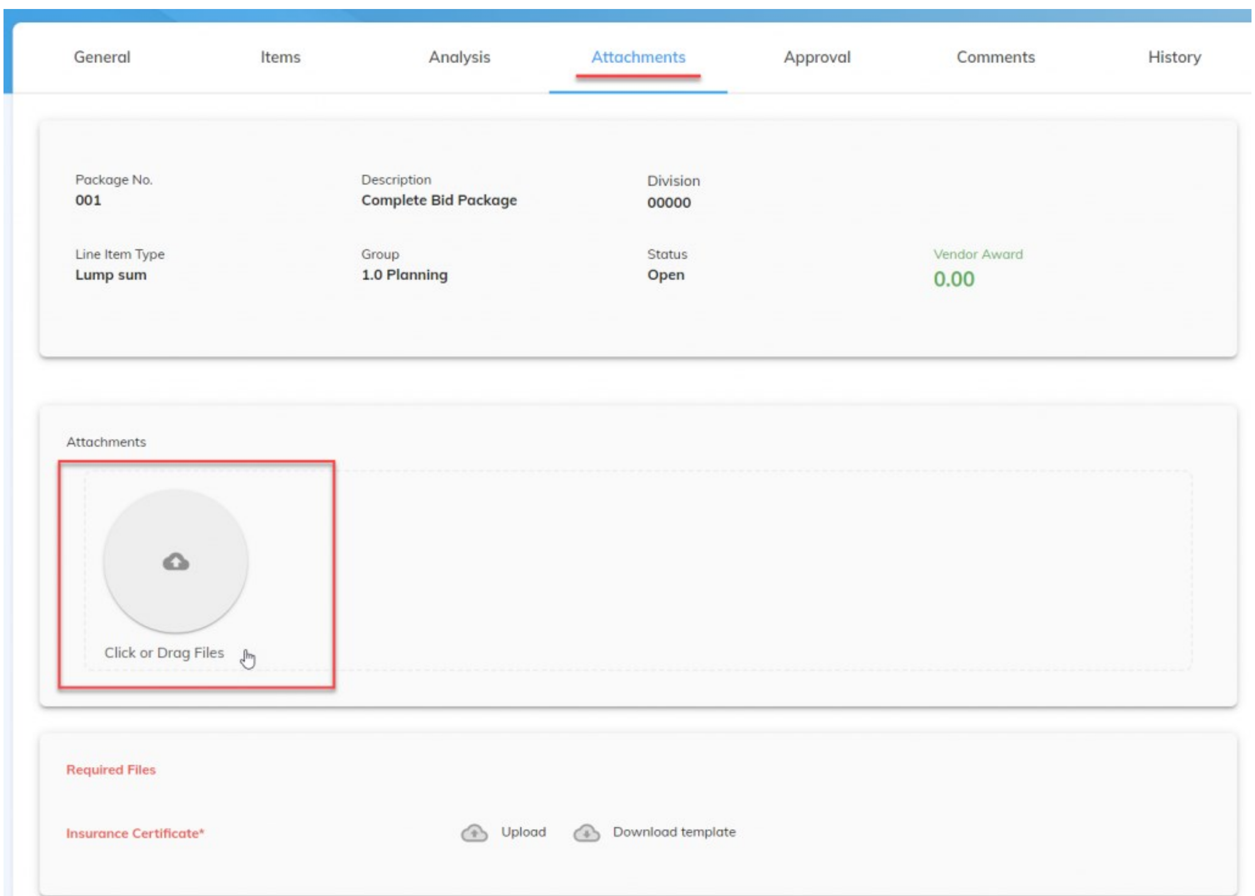
    a. **Click the Save button at the top right corner of the screen to successfully save this new Bid Package.**



5. **You will be able to view and edit the line items of the package in the Items tab. The "Total Amount" is taken from your budget and will be used to compare against the bidders. The bidders will not be aware of these numbers.**

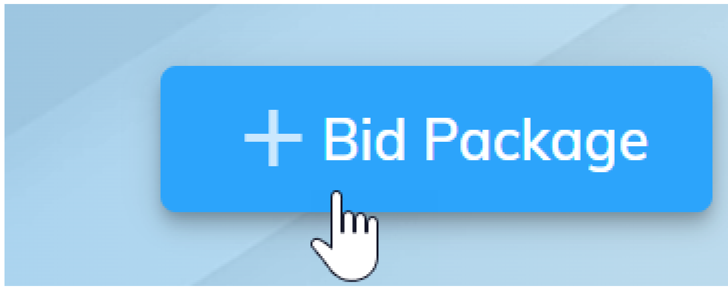


6. **To add attachments:**
    a. **Go to the Attachments tab.**
    b. **Click the cloud icon or drag and drop into this area.**
    c. **You may also add required files in this tab and download template for the required files, if available.**



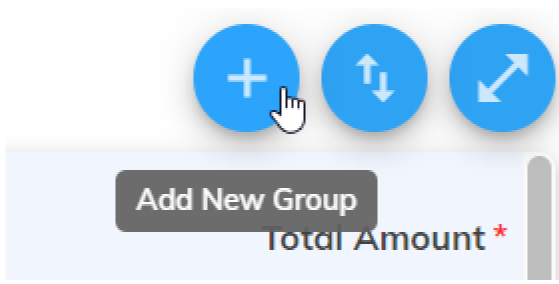
Method Two: Creating A Bid Package From The Bid Packages Log

1. **From the log page of Bid Packages, click on + Bid Package to start creating a new Bid Package.**

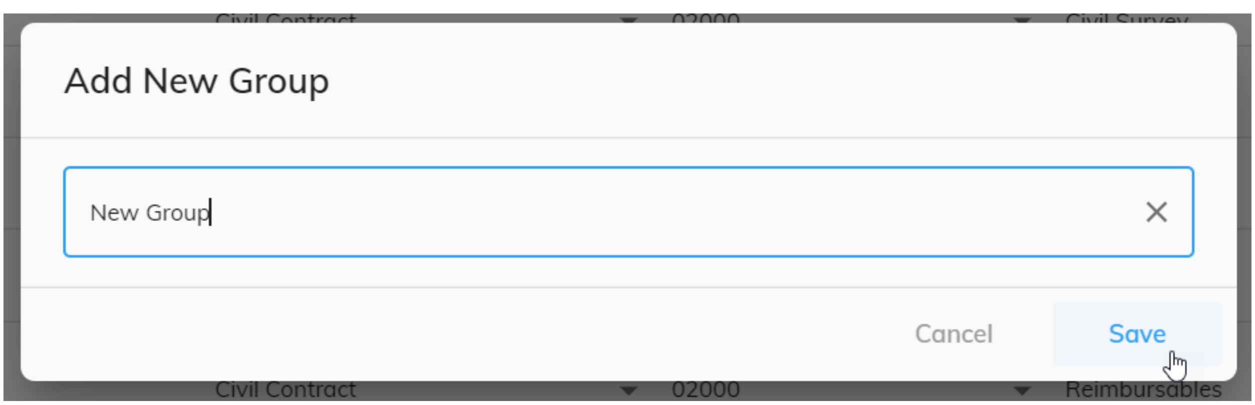


2. **Add information in the required fields (marked by red stars) in the General tab and click on the Save button at the top right corner of the screen to successfully save this new Bid Package.**
3. **To add items to this Bid Package:**

    a. **Go to the Items.**
    b. **Click on + at the top right of the items table to add line items manually.**

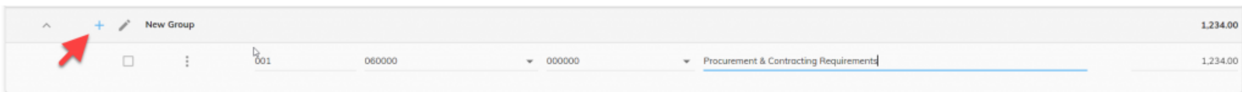


    c. **Add name to the New Group of line items that you want to add and click Save.**



d. Now add additional details, such as item number, budget/fund code, object code, description, and total amount to each item in the group.

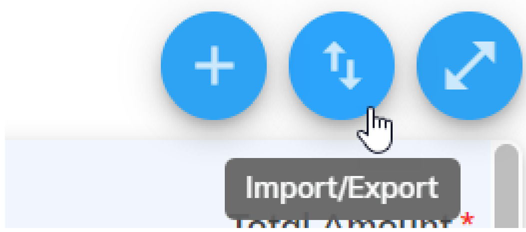
e. To add new items to the group, click on the + on the left of the group name.



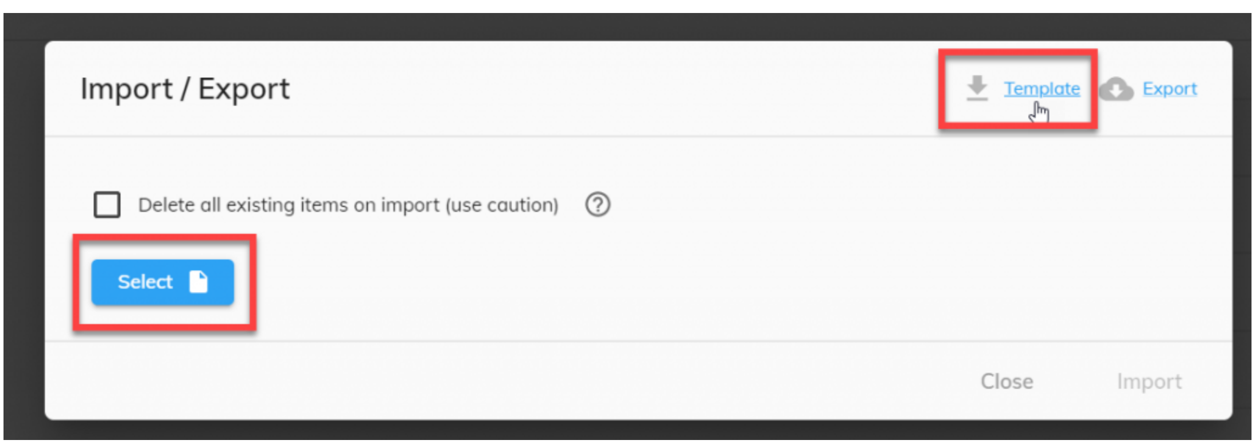
f. Save these items by clicking on Save on top right corner of the screen.

4. Alternatively, to import multiple line items instantly into the package.

   a. Click on the parallel arrow icon on the top right of the line items table.



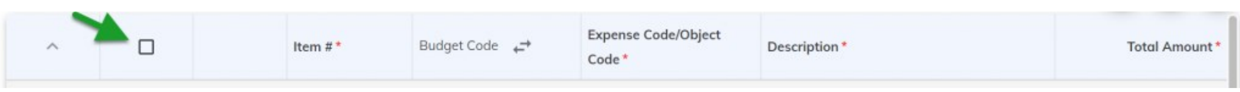
   b. Click on Template to download the template for a successful import and then select the file you want to import by clicking Select. You may want to check the Delete all existing items box when you want to replace existing items with new ones to avoid duplicates.



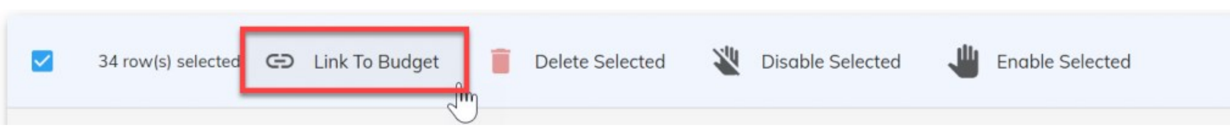
   c. Click on Import when you are done.

Note: Items when added through the import function are saved automatically when import is performed. When adding items manually, it is necessary to click Save to save any new items.

5. **Items added using this method need to be linked to the budget for further actions like contract creation and all following processes to be reflected in the budget. If your organization manages the project budget, this is an extremely important step. Otherwise, your contract and any change orders and invoices against the contract will not be displayed properly in the budget. To link items to budget:**
    a. **Select all items by checking the box at the top left corner of the table.**



    b. **Click Link to Budget.**



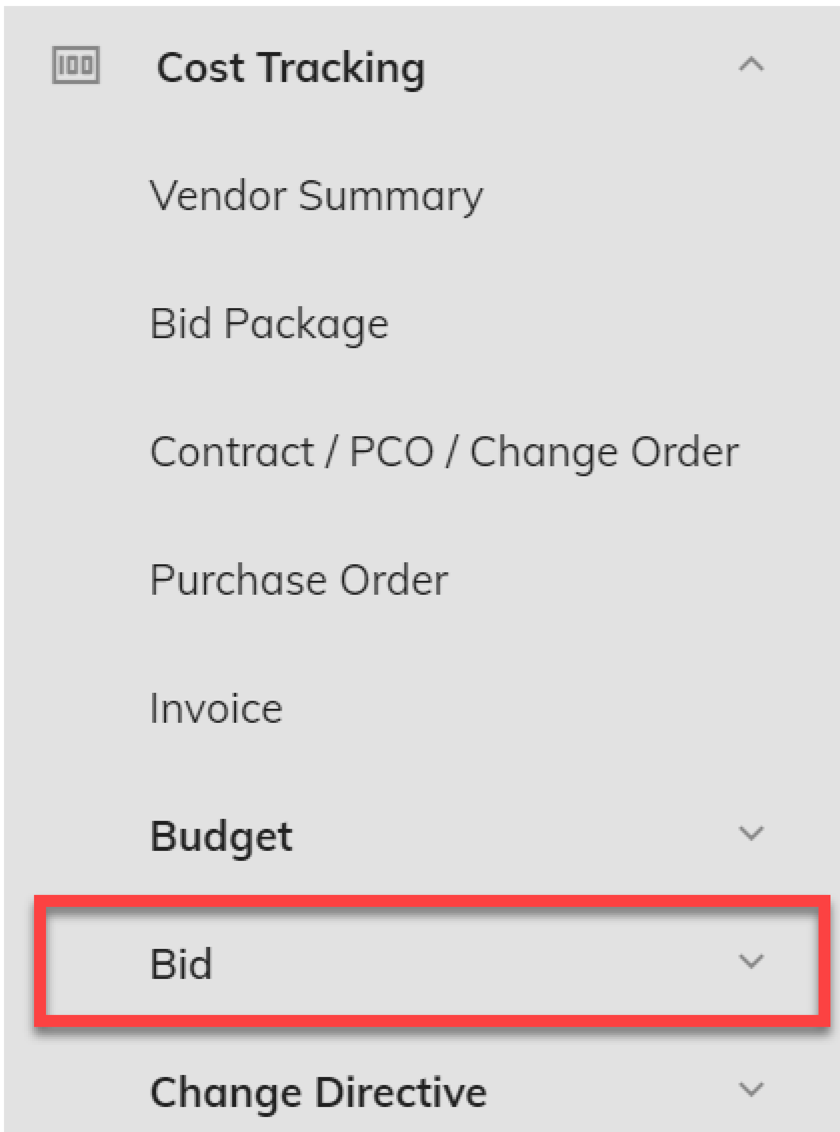
    c. **Choose from one of the three options:**
        i. **Select Create new budget line item and add links if there currently isn't an appropriate budget item to house the line items of the contract. Choose which Budget thread the budget item will be created in and fill out the fields (WBS/Section, Description). A budget item will be created and your contract line items will be linked as subitems within it.**
        ii. **Select Add links to existing budget items if there is already a budget item that can house your contract line items. Select the budget thread, then the budget item you want to link to. If you selected one line item in your contract to link back, then you have the option to link it to an existing budget subitem or create a new subitem. If you selected several contract line**

items, then the only option will be to create new subitems for all of the PO line items.

iii. Select Remove link(s) without deleting existing budget item(s) to unlink the contract line items from the current budget subitems that they are linked to.

Publishing The Bid To The Bids And Plan Room

1. Go to Cost Tracking > Bid.



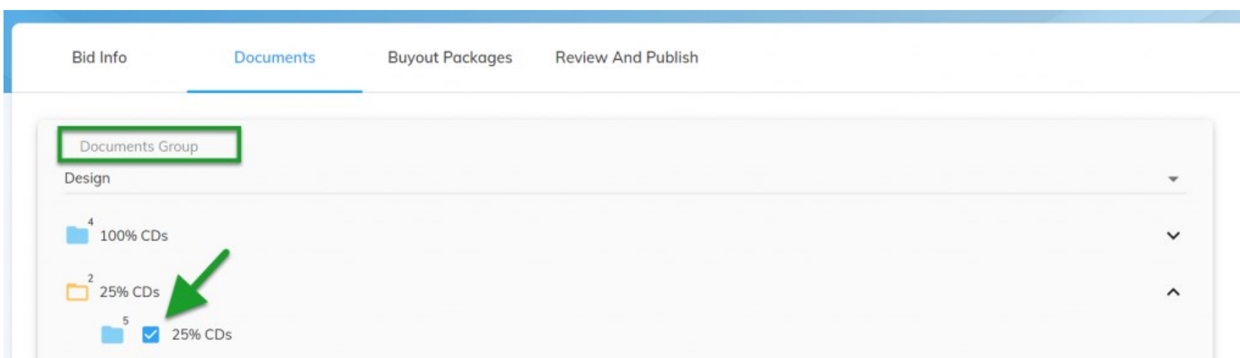
Note: Depending on your organization, there could be multiple menus for managing different bids. In this situation, you will follow Cost Tracking > Bid > (Desired Page Name)

2. The first page you will see will be Manage Bid and it's first tab Bid Info.

    a. You can add/review the Bid information here.
    b. Click Save when done. Once you have added the required information to the page (marked by red star), you can save the bid by clicking Save at the top right corner of the page.

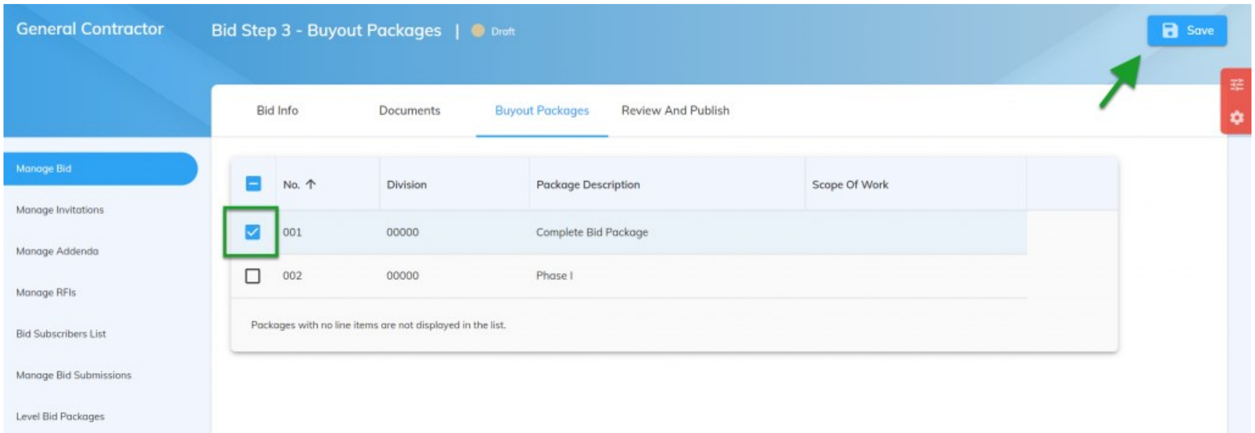
3. Specify where the bid documents are in the Documents tool.

    a. Go to the Documents tab in Bid Management.
    b. Choose the appropriate document group in the drop-down menu.
    c. Select the folders. where your bid documents are located.

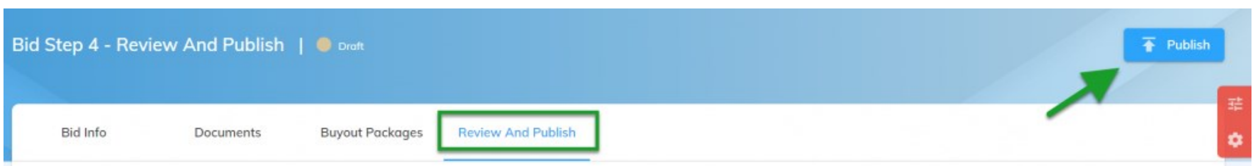


4. Go to the Buyout Packages tab.

    a. Select the Bid Package(s) you want to associate with this Bid.
    b. Save the changes.



5. When you have finished preparing the bid documents and the Bid/Buyout Packages and want to Publish the Bid:
    a. Go to Review and Publish tab.
    b. Click on the Publish button at the top right corner of the screen.

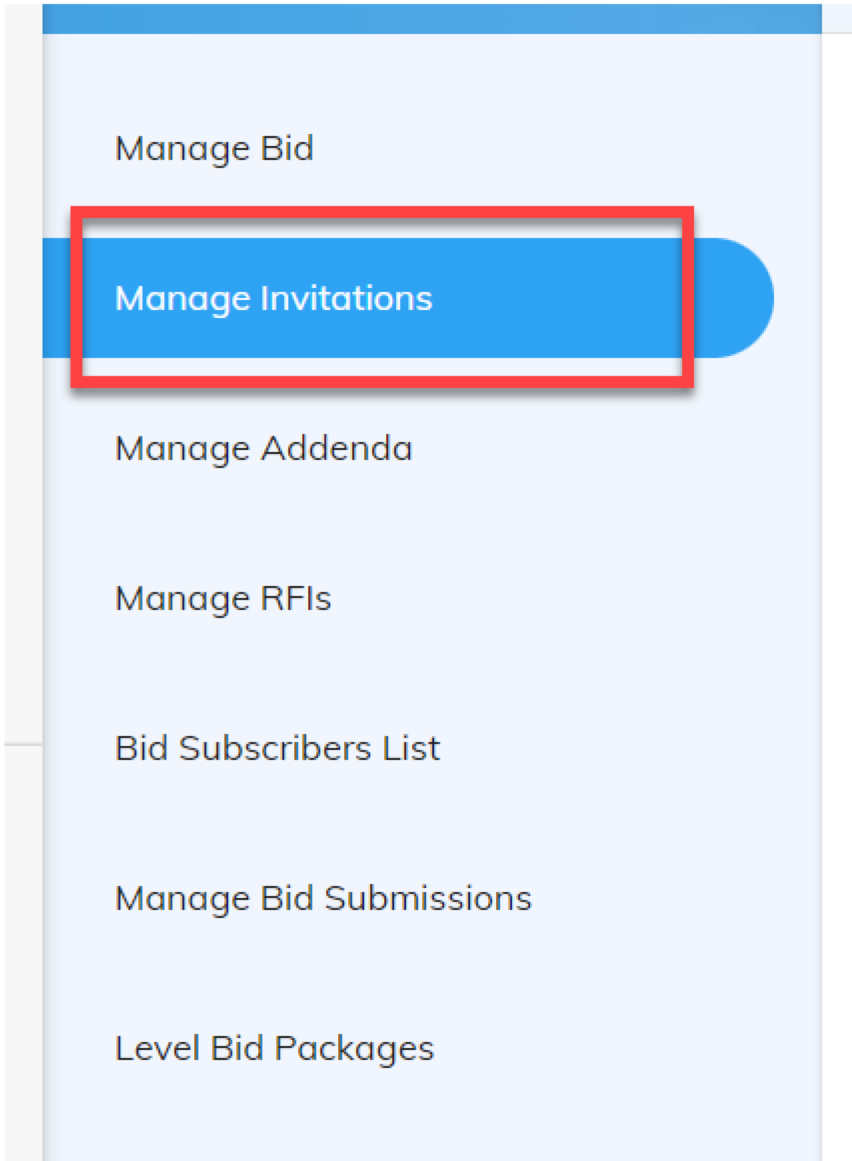


Inviting Your Bidders

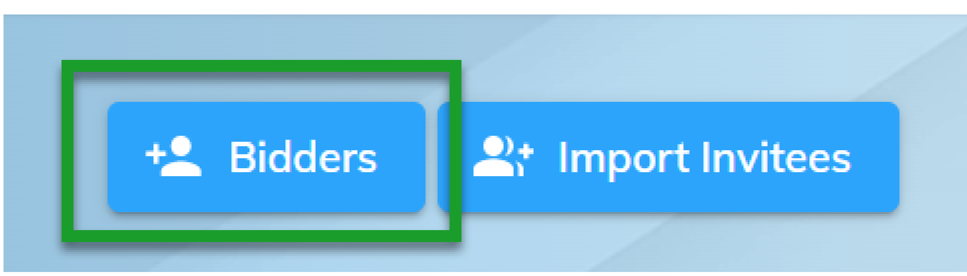
Note: If your organization's Bids are Public, this step can be skipped.

1. To invite Bidders:

    a. Go to the Manage Invitations tab available on the left side of your Bid module screen.



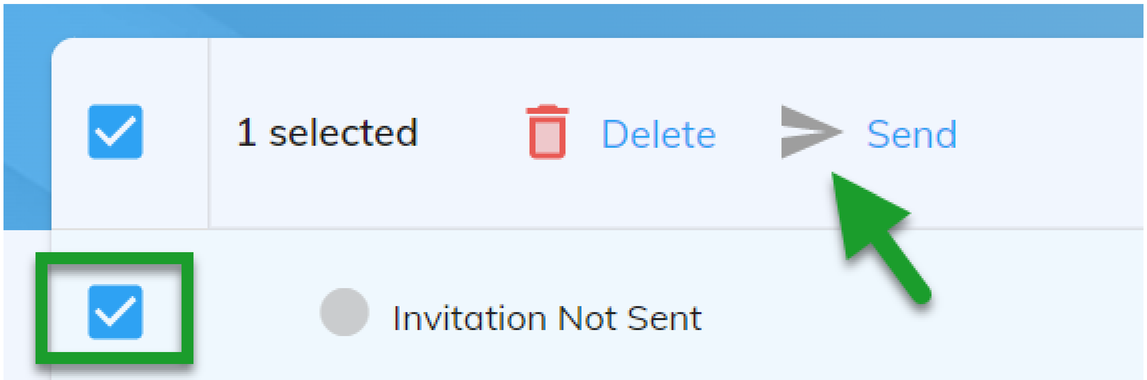
b. **Click on + Bidders on top right corner of the screen to add invitees from users.**



c. **Select users by typing into the smart selection box and checking the boxes by their names.**

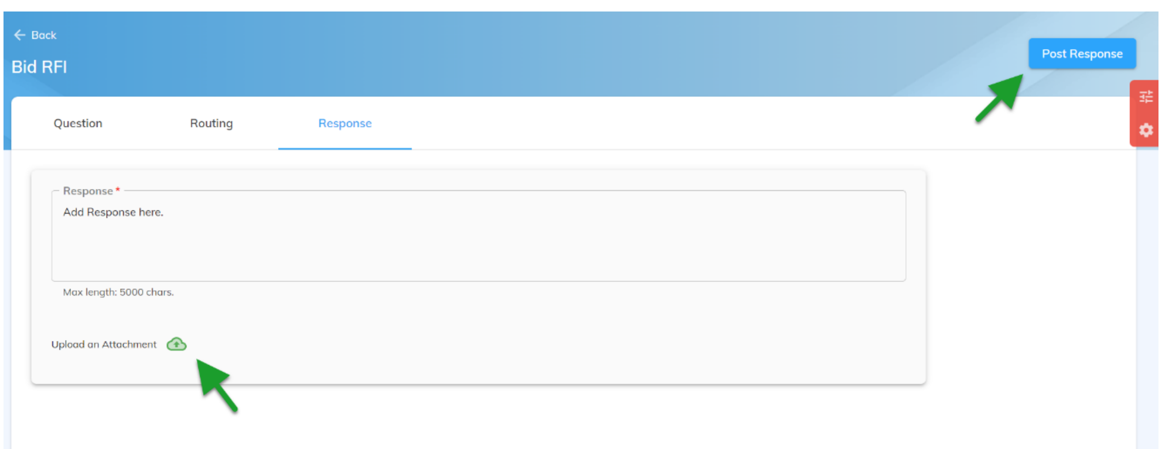
d. Save this action and send invitation by clicking Add at the bottom right corner of the pop-up window.

2. To send the invitation to Bidders, make a selection by checking the boxes next to them and then click Send.



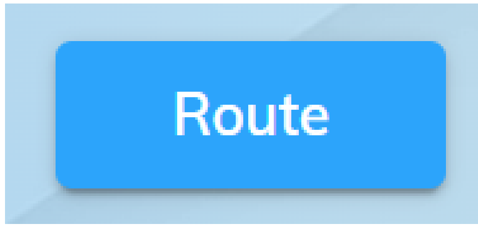
Routing, Answering Bid RFIs, And Q&A

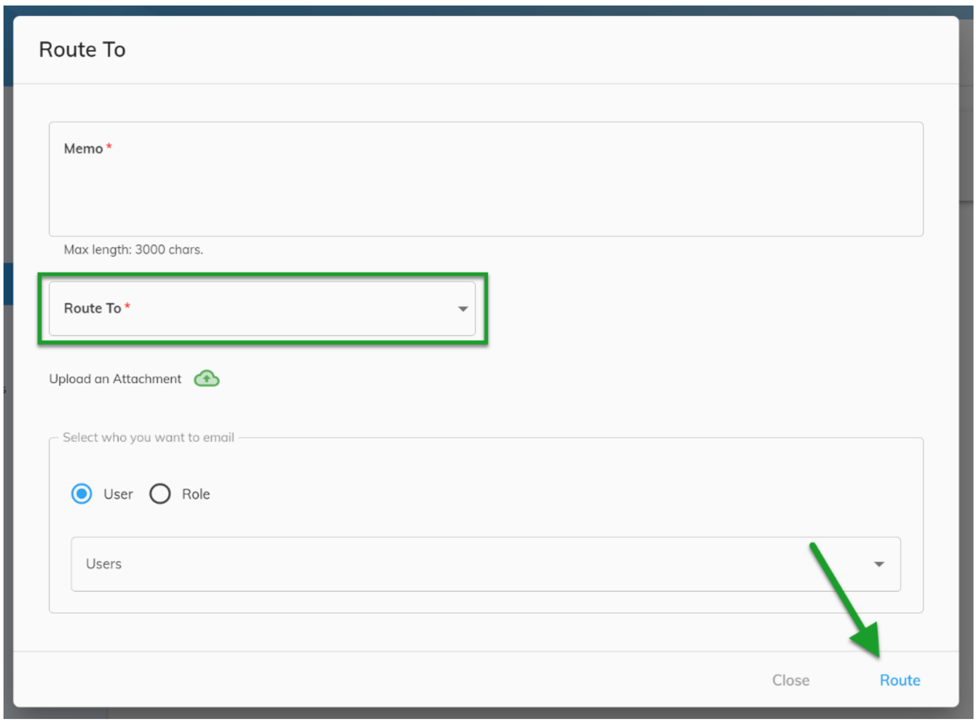
1. To manage an RFI/Question:
    a. Click on the Manage RFIs tab on the left of the Bid screen.
    b. Select the question to be answered.
    c. Add your response in the Response tab.
    d. Click on post response to close the RFI.



2. To Route the RFI:
    a. Click on the Route button on top right of the "Routing" tab.
    b. Add memo and select the user you want to route the RFI to from the drop down.

c. Click on Route to complete this action.



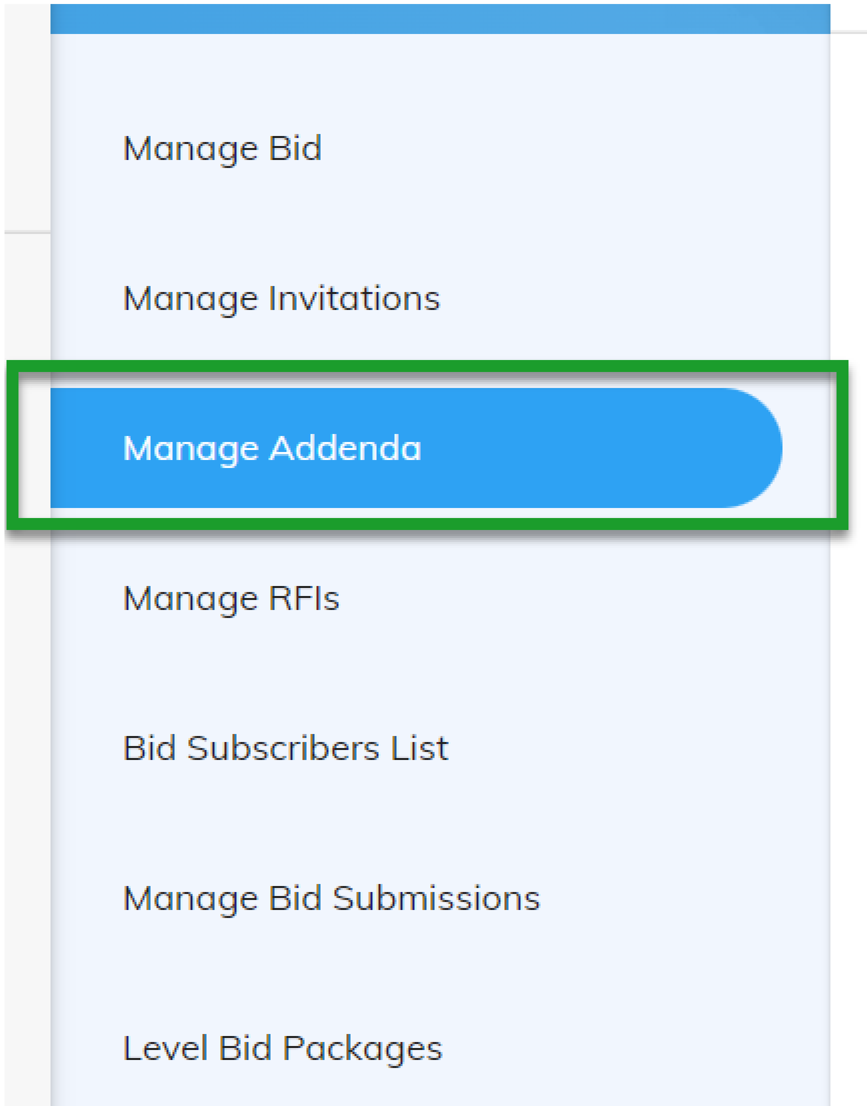


d. You could also select users to be notified with an email in this pop-up window.

Publishing Addenda, Bid Set Revisions, and Extending Due Dates

2. To add Addenda:

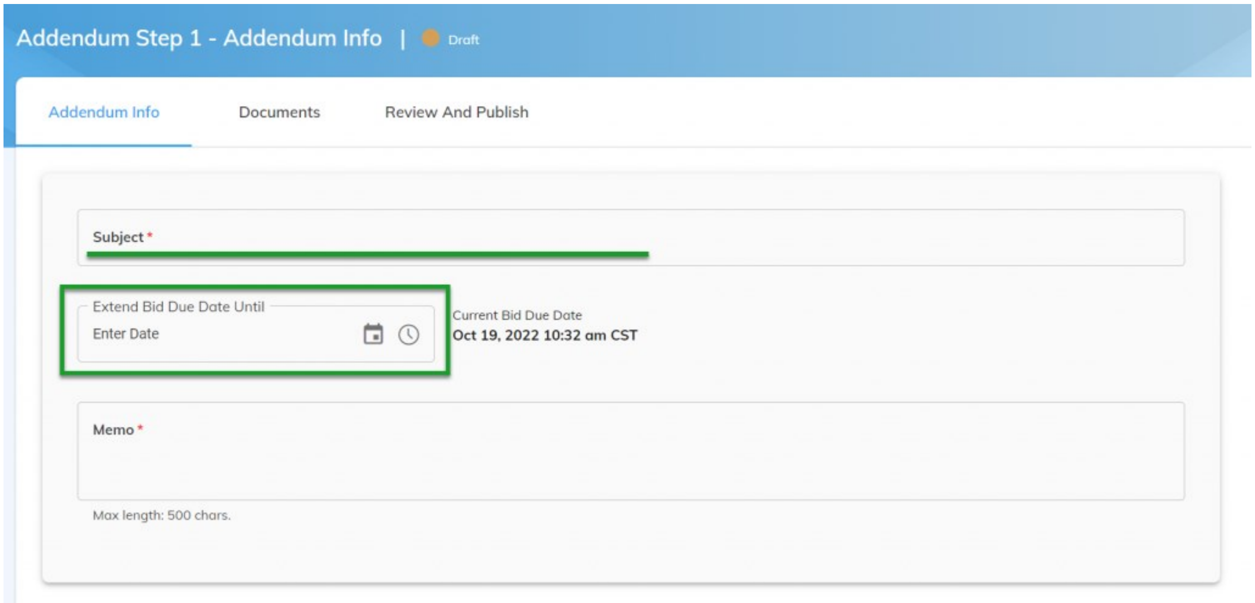
   a. Click on the Manage addenda tab on the left of the Bid screen.



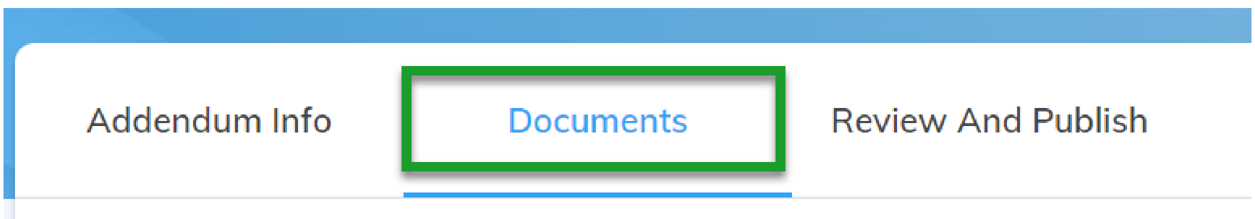
b. Click + Addendum.

3. On the Addendum Info page:

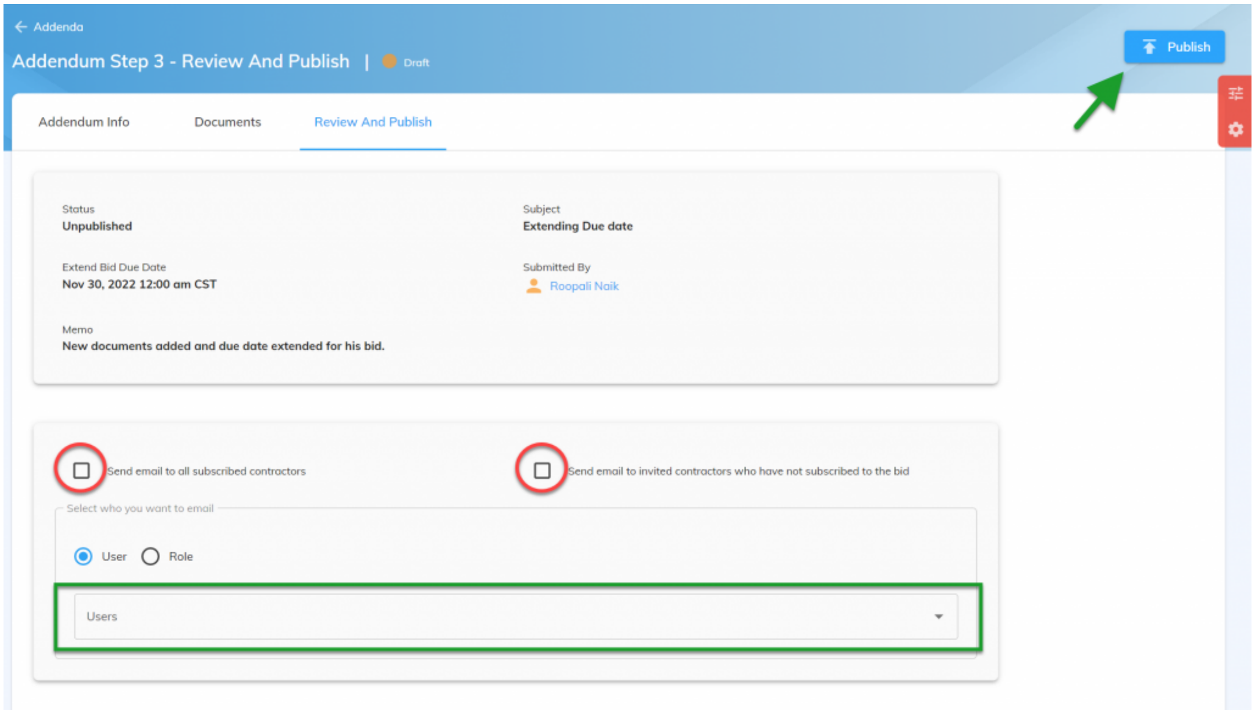
   a. Add a subject & memo.
   b. Select a new date if you want to extend the due date for the Bid.
   c. Click Save on top right corner when done.



3. Use the Documents tab to select new/more documents to be attached from the Documents tool.



5. Review the addendum in Review and Publish tab.
    d. Select your email notification choices by checking the boxes next to the options (circled in red) or add users to be emailed (outlined in green).
    e. Click Publish when done.

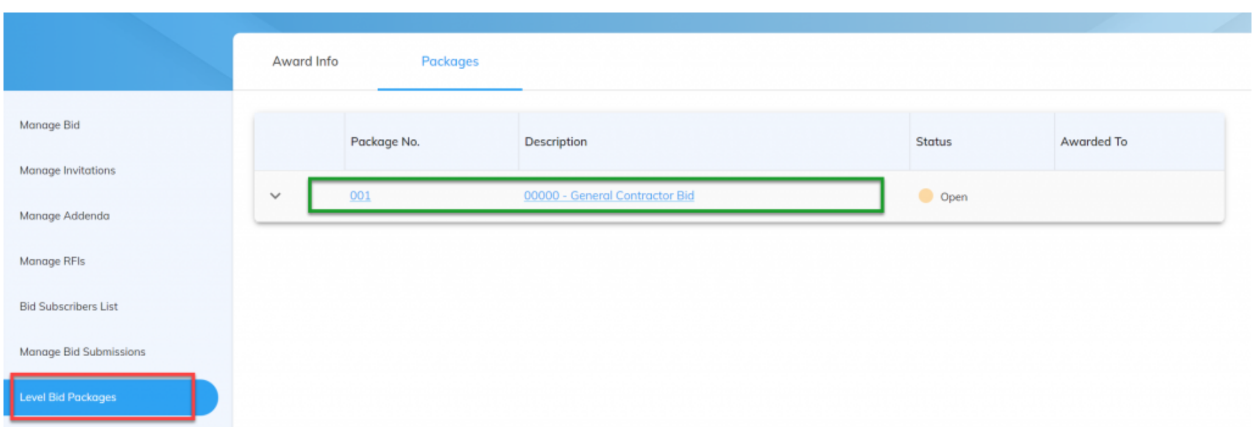


Note: You can Unpublish an addendum to make changes to it if needed and publish again. To unpublish an addendum, open it and click on Unpublish at the top right corner of the page on the Review and Publish tab.

Analyzing Bid Packages, Awarding The Bid, And Converting To Contract

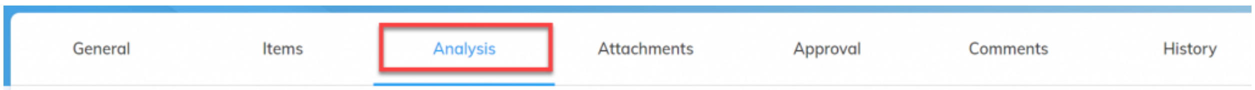
There are two ways to reach the area for leveling/awarding the bid package:

I. **Cost Tracking > Bid > Level Bid Packages and then select the Bid Package to analyze it.**



II. Cost Tracking > Bid Packages > (Click on desired Bid Package to open it).

a. Go to the Analysis



1. **Analyzing Bid Packages:**

The Analysis tab will give you an overview of the submitted bids.

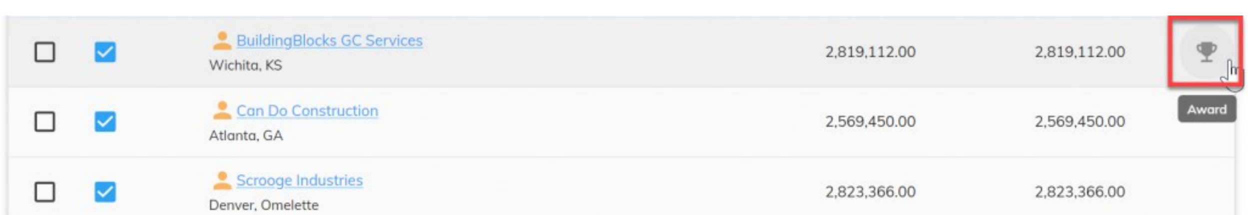
a. **Clicking on individual bidders will show their individual bid submission**

b. **You can download Analysis Grid of the submitted bids by clicking Calculator icon.**

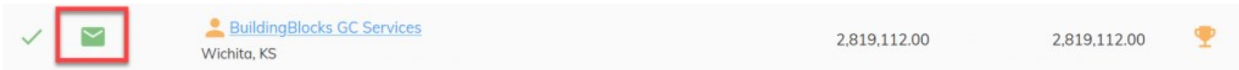
c. **You can add new vendors by clicking the Person + icon. This would be for circumstances where you are entering a bid on the vendor's behalf, or are logging historic bid information.**

2. **Awarding Bids:**

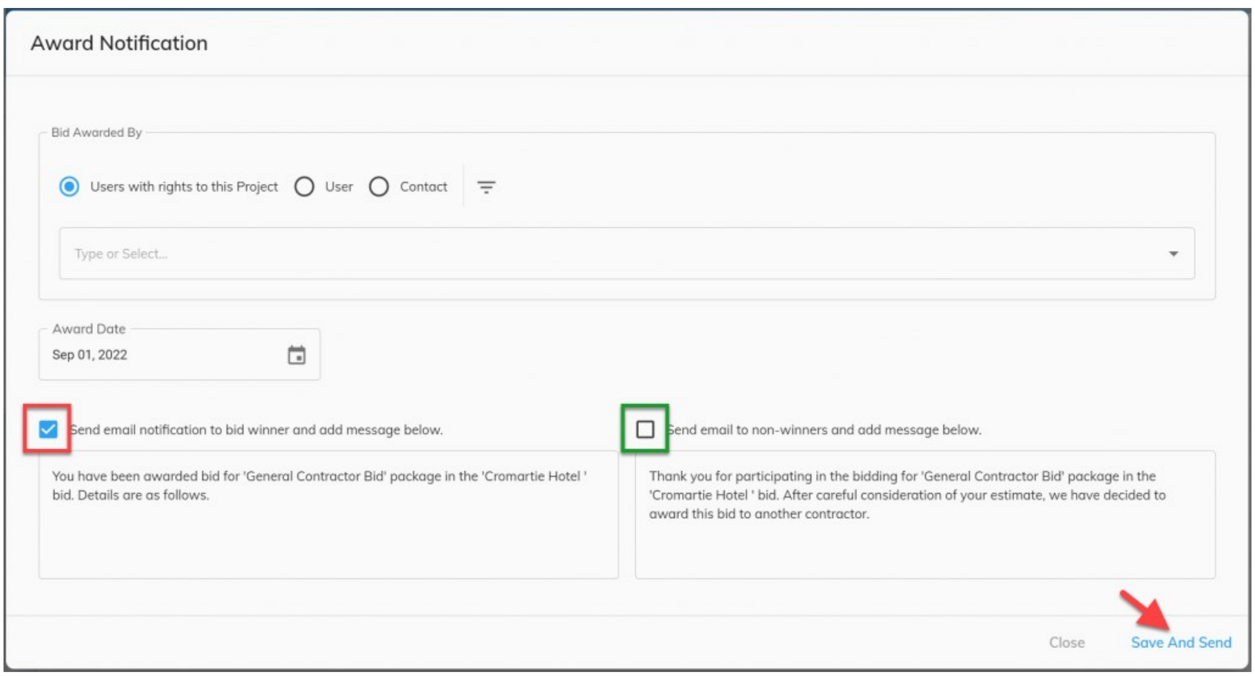
a. **Click on the gray award icon to award the bid. (This icon will represent at the right of bid total of each submitted bid when you hover over it.) The gray icon will turn golden when you have awarded the bid.**



b. When the bid has been awarded, you can choose to notify the winner as well as participants by clicking the green envelop icon that appears on the left of the winner's name.



i. Select a user or contact from the smart drop-down.
ii. Select award date.
iii. To send email notification to the bid winner and add custom message, check the box outlined in red (Refer to the image below).
iv. To send email notification to non-winners and add custom message, check the box outlined in green (Refer to the image below).
v. Click Save and Send to complete this action.



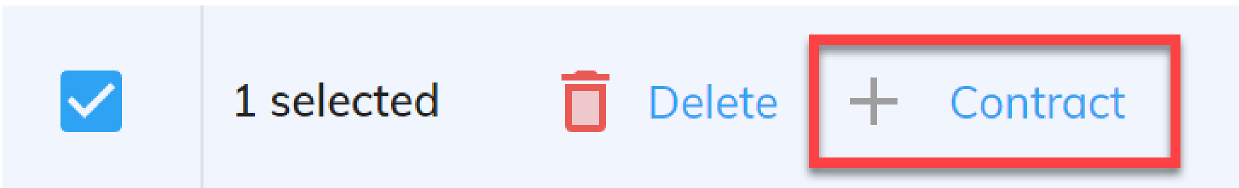
c. In the Approval tab, select the appropriate approval type from the drop-down menu and click Start Approval.

3. Creating Contract from Bid Package(s):

a. Go to the log page of Bid Packages (Cost Tracking > Bid Packages).

b. **Select the Bid Package(s) you want to create a contract from, by checking the boxes on the left of the package listing.**

c. **Click + Contract to create a contract using the selection.**



Note: You can create a single contract from multiple packages.