## CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PDM OVERVIEW</strong></td>
<td>6</td>
</tr>
<tr>
<td>Logging into PDM Pro</td>
<td>6</td>
</tr>
<tr>
<td>Projects Tab Overview</td>
<td>7</td>
</tr>
<tr>
<td>Contacts Tab Overview</td>
<td>8</td>
</tr>
<tr>
<td>Documents Tab Overview</td>
<td>9</td>
</tr>
<tr>
<td>Notifications Tab Overview</td>
<td>10</td>
</tr>
<tr>
<td>Bid Packages Tab Overview</td>
<td>11</td>
</tr>
<tr>
<td>My Account Tab Overview</td>
<td>12</td>
</tr>
<tr>
<td><strong>PROJECT MANAGEMENT</strong></td>
<td>13</td>
</tr>
<tr>
<td>Creating a New Project</td>
<td>13</td>
</tr>
<tr>
<td><strong>CONTACT MANAGEMENT</strong></td>
<td>18</td>
</tr>
<tr>
<td>Organizing Contacts</td>
<td>18</td>
</tr>
<tr>
<td>Searching for Contacts</td>
<td>20</td>
</tr>
<tr>
<td>Creating Contact Lists</td>
<td>21</td>
</tr>
<tr>
<td>Creating New Contacts</td>
<td>23</td>
</tr>
<tr>
<td>Importing Contacting Lists</td>
<td>30</td>
</tr>
<tr>
<td>Sharing Contacts</td>
<td>34</td>
</tr>
<tr>
<td>Emailing Contacts</td>
<td>35</td>
</tr>
<tr>
<td><strong>DOCUMENT MANAGEMENT</strong></td>
<td>37</td>
</tr>
<tr>
<td>Documents Tab Operations</td>
<td>37</td>
</tr>
<tr>
<td>Document Manager Operations</td>
<td>39</td>
</tr>
<tr>
<td>Adding Files to a Documents Folder</td>
<td>40</td>
</tr>
<tr>
<td>Copying Documents Between Folders</td>
<td>44</td>
</tr>
<tr>
<td>Opening a Document</td>
<td>45</td>
</tr>
<tr>
<td>Creating a Subfolder</td>
<td>46</td>
</tr>
<tr>
<td>Adding Documents to Folders by Browsing</td>
<td>47</td>
</tr>
<tr>
<td>Adding Documents to Folders by Drag and Drop</td>
<td>49</td>
</tr>
<tr>
<td>Editing a Document</td>
<td>51</td>
</tr>
<tr>
<td>Undoing a Checkout</td>
<td>54</td>
</tr>
<tr>
<td>Extracting Documents</td>
<td>56</td>
</tr>
<tr>
<td>Re-sequencing Documents</td>
<td>59</td>
</tr>
<tr>
<td>Modifying Document Statuses</td>
<td>61</td>
</tr>
<tr>
<td>Removing Documents From a Folder</td>
<td>63</td>
</tr>
<tr>
<td><strong>MANAGING THE BIDDING PROCESS</strong></td>
<td>65</td>
</tr>
<tr>
<td>Prequalifying Bidders</td>
<td>66</td>
</tr>
<tr>
<td>Inviting Potential Bidders to Prequalify</td>
<td>66</td>
</tr>
<tr>
<td>Collecting Potential Bidder Prequalification Information</td>
<td>70</td>
</tr>
<tr>
<td>Viewing Detailed Prequalification Information for Each Bidder</td>
<td>73</td>
</tr>
<tr>
<td>Selecting Prospective Bidders for the Project</td>
<td>75</td>
</tr>
</tbody>
</table>
Defining Bid Packages ................................................................. 76
  Creating Bid Packages ................................................. 76
  Organizing Bid Documents ........................................... 80
  Adding Bidders to Bid Packages .................................. 82
  Adding Bidders to Bid Packages ................................... 83
  Sending Invitations to Bid for a Bid Package .................. 84
  Sending Invitations to Bid for a Bid Package ................. 85
Inviting Subcontractors to Bid ................................................. 90
  Subcontractor Receives Email Invitation to Bid .............. 90
  Sub Reviews Bid Package in Online Plan Room .............. 91
  Subcontractor Replies with bidding intentions ............... 94
Managing Subcontractor Bid Responses ............................... 95
  Reviewing the Bidder Coverage .................................... 97
  Bid Package Report ....................................................... 98
Processing an Addenda ............................................................ 99
Awarding the Bid Package .................................................... 104

MANAGING USER SETTINGS ........................................................................ 106
Managing My Account ............................................................. 106
PDM OVERVIEW

PDM Pro is a Windows Remote Application developed with the latest Internet Technology. It runs on the local computer as a native windows application, but connects to a remote web server for services and data. This provides the rich user interface of a windows application with the easy deployment and maintenance of a web application.

A user can access this application from any PC in the world. They simply have to connect to a special page or link we set up on their web site and click on the PDM button. PDM will then install the appropriate software on the PC each time it is executed.

PDM is an application that allows you to manage the way you communicate with other people on the project and also how you store, access, and distribute documents. PDM is a sophisticated tool that allows you to manage your documents, bid packages, contacts, notifications, reports and many other things related to your project.

Logging into PDM Pro

Click on the PDM icon on the desktop to launch open PDM.

Enter a valid Email and Password and click OK.

When you login, PDM will open. A series of tabs will be listed across the top. The tabs are Projects, Contacts, Documents, Notifications, Bid Packages, My Account, and possibly some other custom tabs.
Projects Tab Overview

When the main window displays, the Projects tab is displayed and shows all of the projects that you have created and have been granted privilege to act as an administrator.

From this page you can monitor all projects in all phases and access detailed project information.
Contacts Tab Overview

Click the Contacts tab.

The Contacts tab allows you to create a directory of all of your contacts. This can include architects, project managers, engineers, subcontractors, etc. You can store their name, company, address, service areas, phone numbers, construction codes and more.

Note: PDM allows the subcontractors to be organized by construction codes that define the types of services they provide. Both CSI master formats are supported. MasterFormat 95 is the original specification containing an introduction and 16 divisions. Division 1 is critical because it provides an overview of the general requirements including a summary, administrative requirements and product requirements. CSI MasterFormat 04 was created to increase the divisions to 40.

PDM is capable of supporting MasterFormat 95 or MasterFormat 04 but not both at the same time.
Documents Tab Overview

Click the Documents tab.

The Documents tab allows you to manage and organize your own documents. PDM allows you to easily create a folder structure and then add documents to the folders. These documents are available from any computer connected to the web.
Notifications Tab Overview

Click the Notifications tab.

The notifications tab allows you to monitor and review all notifications that they have sent or received. It provides a quick method of reviewing the status of communications with project team members. This is particularly helpful when you are monitoring multiple Invitations-To-Bid that you have sent.
Bid Packages Tab Overview

Click the Bid Packages tab.

The Bid Packages tab allows you to monitor all active bid packages for all projects. This allows you to quickly review the status of all bid packages or get detailed information for specific bid packages.
My Account Tab Overview

Click the My Account tab.

The My Account tab allows you to enter your public and private contact information and notes.
Creating a New Project

PDM allows you to manage your projects. You select the projects that you want to manage and display in your "Projects" tab. Each project contains a name, description, thumbnail, and attributes.

To create a new project, click the Projects tab.

Right click and select Manage My Projects.
The project list will be displayed. On the left side is a list of all portals and the projects available on that portal.

In the **My Projects** window, select the portal in which you want to create the project, right click, and select **Create Project**.

![My Projects Window]

The New Project wizard opens. It will walk you through the steps to create a project. Select the type of project it is from the **Project Type** list. Click **Next**.

![New Project Wizard]

**Create New Project**

- **Step 1:** Select Project Type
- **Step 2:** Description
- **Step 3:** Attributes
- **Step 4:** Review

**Select Project Type**

- Commercial Development Project
- Education Project
- Facilities Maintenance Project
- Government Project
- Healthcare Project
- Retail Project
- Standard AEC Project

Click **Next**.
Enter the **Project** information like **Display Name**, **Description**, **Status**, and **Default Print Location**. Click **Next**.

Enter the **Attribute** information. Click **Next**.

Review the project and click **Finish**.
The project is created and listed in the Available list. Select the project and click the right arrow to move it to the Selected list. Click OK.
The project is listed on the **Projects** tab.
CONTACT MANAGEMENT

PDM contains a very robust contact management system that is easy to use. Contacts can easily be created, imported, organized, and searched for. Contacts can be managed at two levels, at the global level and the project level.

Organizing Contacts

There are many ways that you can organize and search for contacts in PDM. With large numbers of contacts, you can find them by browsing through contact lists, by sorting by fields, by sorting by groups, or by running a search based on criteria.

You can change the view of your contact list by organizing columns and sorting them. You can put the columns in the order you want to see them. To organize your columns, click on the column header that you want to move and drag it to where you want to display it. (Be sure to drag it only along the column headers.)

To sort a column, click on the column header. To make a secondary sort, click on the second column header. To remove a sort, click on the column header again.

You can also show your contacts in groups. To show a group, select it in the Group By list. For example, if you want to display contacts by last name, select Last Name from the list.
When you do this, the tabs down the side will allow you to easily see contacts that start with that letter or number. Click on the tab that contains the information you want to display.

For example, if you want to show all of the contacts with the last name that begins with “S”, click on the “S” tab.

The list will display all of the contacts with the last name beginning with “S”.

Click the star (*) to display all.

You can also group contacts by First Name, Organization, and Construction Codes.
Searching for Contacts

When you have very large contact lists, or when you are having trouble locating a contact, you can search for contacts by any attribute.

To search for contacts, right click and select Search for Contacts.

Enter in the search criteria by which you want to search in the Attribute Field by which you want to search. Click Search. You can enter any combination of contact information to perform a search.

The results will be displayed. Once you have located the appropriate person, you can drag the person to any screen that lists contacts. For example, you could drag a searched contact to a contact list, to a bid package as an invitee, or to a notification.
Creating Contact Lists

You can organize your contacts in contact lists. Contact Lists can be used to organize groups of contacts by discipline, geography, bonding amount, or any other criteria. You can create as many contacts lists as they like and add small or large numbers of contacts to each list.

A contact can be in multiple lists, but there is only one contact record. When the contact information is updated in one list, it is updated in all lists.

To create a new list, right click on the Contacts List panel and select Create New Contact List.

Enter the name of your new contact list and click OK.

To add contacts to the list, search for the contacts you want to add using the Contact Search window.

Drag the contact to the main PDM Contact window and drop him on the newly created contact list.
Click on the newly created contact list to show that the contact has been added to the contact list.
Creating New Contacts

You can create a new contacts. All contacts have a unique identifier (their email address) and belong to an organization and location.

To create a new contact, right click on the contact list, and select Create New Contact.

Enter an Email Address and click Verify to see if it is unique. PDM uses the email address as a unique duplicate key. This assures that duplicate contacts aren't entered into PDM. Click Next.
Contacts are organized based on the organization and location where they are based. This makes it easy to locate information on multiple people within the same company.

To create a new organization, click **New** to the right of the **Organization** text box.

Enter the organization information. You can enter standard organization information, as well as basic prequalification information.
Frequently users who are searching for subcontractors to be used on a project will need to assure that they have a certain percentage of subcontractors who are “Disadvantaged” bidding on the project. The basic system allows the user to search for subcontractors by the three most common disadvantage types: Minority Business Enterprise (MBE), Woman owned Business Enterprise (WBE), and Disadvantaged Business Enterprise (DBE).

Each organization may have one or more locations where they conduct business. PDM allows each of these locations to be separately identified. This allows a user to locate the appropriate location for performing work on a remote project. To create a new location, click Add.

Fill out the appropriate information for the location of the new contact, and then click the Contact Tab.
Enter the address and telephone information for the new location.

Click **OK** to save the information.

The new organization and the new location will be displayed in the summary screen.

Click **OK**.
Click Next

Enter the appropriate contact information and click Next.
You can enter the construction codes for which this contact provide services. You can also enter a service area which identifies what geographic locations this contact should be used to service.

Select the **Construction Codes** and then click **Next**.

The Service Areas allows a user to search and locate contacts based on geographies services instead of office addresses. For example, a subcontractor may provide services in Dayton, Ohio even though their office is located 50 miles away in Cincinnati, Ohio. The user would specify two Service Areas: Greater Dayton Ohio, and Greater Cincinnati Ohio. Users searching either city would find this contact.
Enter any custom attributes for the contact.

Click Finish.
Importing Contacting Lists

You can import a list of contacts from an external file. Contacts from other programs can be quickly imported into PDM.

Select a Contact List and then right click and select Import Contacts.
Click **Browse** and browse to the .xls or .csv file that contains the contacts you want to import and click **Next**.

Verify that the fields contained in the contact import file match the properties of the PDM contact record then click **Next**.
PDM will display a list of all of the contacts to be imported. Verify that the information is correct. Click Next.

The new contacts will be processed and entered into the system.
When PDM is finished importing, a summary of the records imported will be displayed. If any errors occur, it will allow you to view the information about each contact that caused an error so you can correct it and re-import it.

Click Finish.
Sharing Contacts

PDM allows users to share their personal contact lists with others. This allows one group of project team members to share a custom list of contacts with others.

Right click on the contact list that you want to share and select **Share**.

Drag the contacts with whom you want to share the contact list with into the **Share With** window. Click **OK**.
Emailing Contacts

You can send an email to any contact or contacts directly from PDM. This saves you the time to create a new email and type in the email addresses.

To send emails, select one or more contacts, right click, and select **Send Email**.
A new message will open with the **To** field already populated with their email addresses.

Type your message and click **Send**.

**Note:** Emails sent this way are NOT tracked in PDM.
DOCUMENT MANAGEMENT

Documents Tab Operations

PDM provides two types of document storage and organization. Non-Project Documents and Project Documents. The Non-Project documents are documents organized in the base PDM application in three distinct groups: Personal Documents called "My Documents", Company Documents called "My Company's Documents" and Divisional documents called "My Division" Documents.

On the Documents tab, you can modify your "My Documents" folder structure and access the Company and Division documents in the tree structure if they have been given permission to access those folders.
Personal documents:

Company documents:

Division documents:
**Document Manager Operations**

There are many advantages of working with PDM Document Manager. PDM Enterprise tracks all document activity. With PDM’s version control system, every document that comes into PDM is versioned. If a duplicate document is added to DFS, it gets a new revision number and becomes the current version and previous versions are marked with a red dot to indicate that it is an older version. No documents are deleted or over-written.

There are three ways to access a document that is already in PDM. You can open, edit, or view the document.

Opening a Document: When you open a document, you are opening the native “Design” format of the document in Read-Only mode.

When you edit a document, you are checking out the “Design” format of the document. The document is marked as “Under Change” and no one else can make changes. You can then make changes and then check the document back in as a new version.

Viewing a document: When you view a document, you are opening the “Viewable” format of the document. This might be the same as the design format or it might be a in a different format. For example, if you view project plans, the original may be a TIF file but the viewable format could be a low-resolution PDF file.

You can always access documents from the Manage Documents window. Every time you view, open, or edit a document, it is downloaded to your local machine. PDM Enterprise will select the download location. As a consequence, you do not need select, remember, or search for a document download location. All you have to do is access it right out of the Manage Documents window. If you already have the current version downloaded to your local machine, PDM will access the local copy. If it is not the current version, PDM Enterprise will download the current version for you. PDM Enterprise manages all of your downloads for you.

Note: If **Open**, **Edit**, or **View** do not appear in the right click menu, you need to turn them on by going to the **Manage** menu and selecting **Options**.

Select, **Open**, **Edit**, and **View** on the **Context Menus** tab and click **OK**.
Adding Files to a Documents Folder

PDM provides a sophisticated Document Capture application. Right click on the Documents Window and select “Manage Documents”

The manage documents window will be displayed.

Windows files can be added to any folder by dragging them into the Manage Documents window.

To add files to a folder, select the project under Available Projects. All the projects that you have access to are listed there. Under Project Folders, select the folder in which you want to add the files.

Then, on your local drive, select the files that you want to add to the folder and drag them into the open folder in the Manage Documents window.
When you drop the files, the files may be uploaded immediately or you may be prompted to enter some further information. Some folders will require you to enter information about the documents that you are adding before they are uploaded. If prompted, do the following (you may not be prompted for all of the following steps):

Select the type of document it is and click OK.

Select Active or Draft to set the status of the documents. Active documents are immediately available for viewing and ordering if this project is on a DFS web portal. Draft documents must go through an approval process before they are available on the DFS web portal.
Enter the attributes for the documents and click OK. A red star next to a field indicates that the attribute is required.

The document will be uploaded into PDM and will appear in the folder.

If you added a file into a folder that already contains a file with the exact same name, then a new version of the existing document will be created. If the file name is unique, then the document will go in as the first revision.

After taking the time to enter 3 or 4 documents, let the customer know ReproMAX members can provide you with production importing and indexing services drastically reducing the time it takes to import documents into the customers archive.

Don’t forget, before the documents can be fully processed you must start your Gateway Processor.
**BEK File Sharing**

**Available Projects**
- Great Lakes South Hospital

**Project Folders**
- Project Folders
  - Floors
  - Structural
  - Project Photos

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<tr>
<th>Document</th>
<th>Status</th>
<th>Version</th>
<th>Revision</th>
<th>Source Application</th>
<th>Source Type</th>
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<tbody>
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<td>Piping Details.doc</td>
<td>Active</td>
<td>1</td>
<td>6/12/2006 10:54:16 AM</td>
<td>Share File</td>
<td></td>
</tr>
</tbody>
</table>

**File Sharing**
- Share File
Copying Documents Between Folders

PDM allows documents to be dragged between any two folders. PDM will add the document to the second folder.

If you wanted to drag a document from your "My Document" folder to a project, you could simply open both windows and drag the appropriate files between the two windows.
### Opening a Document

Opening a document will open the native design format in Read-Only mode.

To open a document, right click on the document and select Open.

The document is downloaded to your machine and is opened in Read-Only mode.

Close the document when you are finished. If you need to re-open it, repeat the steps to open the file in Manage Documents. PDM Enterprise will not need to download the document again unless it has been updated. In which case, it will download and open the current version.
Creating a Subfolder

You can add subfolders to any folder in the folder tree.

To add a subfolder, right click on the folder in which you want to add the new folder and click **Add Subfolder To <Folder Name>**.

Enter the name of the folder in the **Folder Name** field and click **OK**.

**Note:** You cannot have multiple folders with the same name. This includes inactive and deleted folders that may not be displayed.

The folder is added.
Adding Documents to Folders by Browsing

You can upload a batch of documents into Manage Documents. There are two ways to do so, you can use the Upload Files menu option or drag a folder or documents into the Manage Documents window. If you drag a folder or documents, you get the additional option of compressing the files into one ZIP file.

To upload a folder and all of its documents and subfolders, right click in Manage Documents on the folder to which you want to upload the files and select Upload Files To.

Select the folder that you want to upload and click OK.
A message displays to verify what you are about to upload. Click Continue.

The folder is uploaded with all of its documents and subfolders. The Manage Documents folder name is the original path of the folder. You can rename the folder if needed.
Adding Documents to Folders by Drag and Drop

You can drag and drop a folder or a group of documents into a Manage Documents folder. When you drag a folder into Manage Documents, you can upload it as a single ZIP file or as individual files and folders.

To upload folders or documents, select the folder in Manage Documents in which you want to upload the files. Drag the folder or group of documents into the Manage Documents window.

If you are uploading a folder, you are asked if you want to upload it as individual files and folders or if you want to compress them into a single ZIP file.

Do one of the following:

- Click Upload to upload the folder and all subfolders and documents as individual files.
- Click Single to compress all of the files into a single ZIP file.
If you selected Upload, the folder is uploaded with all of its documents and subfolders. The Manage Documents folder name is the original path of the folder. You can rename the folder if needed.

If you selected Single, a single ZIP file is uploaded into the folder you selected.
Editing a Document

When you edit a document, you are checking out the “Design” format of the document. The document is marked as “Under Change” and no one else can make changes. You can then make changes and then check the document back in as a new version.

To edit a document, right click on the document and select Edit.

Do one of the following:

- Select Under Change, Available. This will mark the document as “Under Change” and keep it available for other users to view the document while it is checked out.

- Select Under Change, Unavailable. This will mark the document as “Under Change” and restrict the document from being accessed by others while it is checked out.

- Enter a description of why you are editing the document for the Under Change Comment. Click Finish. This information will be displayed to others people who are using PDM.
The document will be downloaded to your machine. In Manage Documents, the document will be displayed in red, indicating that it is under change. It also displays the edited version of the document under the original.

![Image of PDM User Guide](image)

The document is open and available for editing. The title of the document begins with “Edit of...” indicating that this document is under change and editable. Make the necessary edits.

![Image of Project Specifications](image)

When complete, you can close the document and application. When you close the application used to edit the document, PDM Enterprise will prompt you if you want to submit the changes now. Click Yes or No. If you click Yes, the document will be uploaded as a new version. If you click No, the document will remain checked out. (In order for this message to display, the application must have been opened by PDM Enterprise and then completely closed. If the application was previously open or if you close the document only and leave the application open, this message will not display.)
If you do not submit the changes now, you can reopen the “Edit of” document from Manage Documents to make further edits. PDM Enterprise will automatically access the checked out document that you have on your machine.

You can submit the changes at any time. To submit the changes and check the document back in as a new version, right click on the document in Manage Documents and select Submit Changes.

The document is checked in as a new version and is available for others to edit or access. Previous versions are still in PDM and marked with a red dot, indicating that they are not current. (Depending on the folder properties, old versions of a document may not be displayed.)
**Undoing a Checkout**

You can undo a checkout if you decide that the checkout was not necessary.

To undo a checkout, right click on the document in red in Manage Documents and select Undo Checkout.

If you made and saved changes to the document already, you will be asked if you want to delete the changes. Do one of the following:

Click Delete to continue with the undo of the checkout and delete all of your changes. All changes that you made will be lost.

Click Export to continue with the undo of the checkout but save the changes in a different location on your machine. The document will lose its connection with PDM Enterprise and be an independent entity.

Click Cancel to cancel the operation and keep the document checked out and under change.
If you clicked Delete or Export, the checkout is undone. The action will still be recorded in the transaction log. (For more information on the transaction log, see the “Viewing Document Transactions” section of this guide.)
Extracting Documents

You can extract documents out of the PDM Vault and put in on a drive of your choice. In doing so, the document will lose its connection with PDM Enterprise and be an independent entity. Consequently, it will lose all version control.

To extract a document, go to the main documents tab, or the project Documents tab. Select the folder that contains the documents to be exported. Right click on the document and select Extract.
Select the folder in which you want to place the extracted documents and click OK.

![Folder Selection Dialog]

You will be asked which document type to extract and how the files should be named. Click on the appropriate format and the name fields and click Extract.

![Extract Documents Dialog]
**Re-sequencing Documents**

You can set the sequence of documents if they need to be in a different order. Sequencing is different than sorting. Sorting is a temporary order for viewing and is done by clicking on the column header. Sequencing is actually changing the order of the documents in the database and will affect how they are displayed on the web portal and in Manage Documents for all users. It will also set the print order.

To sequence documents, right click on the folder that contains the documents you want to sequence and click Resequence Documents.
Drag the documents to the order in which you want them. You can also use the up and down arrow keys. To use a sort, click on a column header. Multiple documents can be selected at once by using the Ctrl and Shift keys while clicking.

Click Apply to save the changes.

The documents will be displayed in the new sequence.

Notice the document with the highest value is first in the list!
Modifying Document Statuses

You can modify the status of a document if you need to make a document Active, Draft, Inactive, or Deleted. (Depending on the PDM server, Inactive and Deleted may not be available.) You can modify multiple files at one time. Only Active documents are displayed on a web portal.

To modify the status of a document, right click on one or more documents and select Modify Status.

Select the Status that you want the document to be and click OK.
The document status is changed. Draft documents display in blue. Inactive and Deleted documents display in gray (or they may not display at all).
Removing Documents From a Folder

If you no longer need a file in a folder, you can remove it. Removing a document from a folder does not delete the document out of the PDM Vault; it simply removes it from the folder. If you remove a document that is only contained in one folder, you will not be able to access it with PDM Enterprise Manage Documents. PDM administrator can restore the document using the administrator tools.

To remove a file or multiple files from a folder, right click on the file(s) and select Remove From.

The document is removed from the folder.
MANAGING THE BIDDING PROCESS

Using PDM, you can efficiently manage the bidding process. You can easily invite potential bidders to prequalify by sending them an invitation. They can enter all of their prequalification information online using a PDM web form. The information is stored in PDM and you can view the prequalification information that they submitted and signify if they are prequalified or not.

Once prequalified, you can create a bid package with the plans and specs that you want to send out to bid. You can create as many bid packages as needed for the various disciplines. You can send out an email or fax invitation to bid on a project to any contact that you have in the system.

When the invitee receives the email or fax, they can view the bid documents online, order prints, create electronic takeoffs, or instant print the documents. They then respond to the invitation where their responses are automatically stored in PDM for you to review.

You can run bid package reports and award the bids. All of this information is fully tracked and managed with PDM.
Prequalifying Bidders

The first step in the bid process is to prequalify your bidders.

Inviting Potential Bidders to Prequalify

To prequalify your potential bidders, you can use PDM to send them an email notification asking them to log onto a website and fill out the prequalification form. PDM notifications allow members of the preconstruction team to communicate information back and forth with potential bidders.

PDM allows you to define a pre-design "prequalification" notification with the appropriate graphics and text messages for requesting subcontractors to pre-qualify.

To send a prequalification notification, on the Contacts tab, select the contacts to whom you want to send the invitation. Right click and select the Send Notification to Contacts option.
The next window displays the predefined notification types. PDM allows you to define an unlimited number of notification types. Each notification type can have its own set of attributes, email, fax, and a Web text and graphics. Normally you will have one or more notification types were prequalification.

![New Notification](image)

When the **Select Notification Type** window is displayed, click on the **Invitation to Prequalify** notification type. Click **Next**.
The next screen allows you to enter information describing the notification and when it should be sent.

You can define the scheduled date and time that the notification will be sent. This allows you to set the prequalification notification up before it is to be sent.

Enter a **Display name** and **Description**.

Set the status to **Active**, and schedule a date and time that the notification will be sent.

Enter a **Reply To Email Address** and **CC Email Address**.

Enter the **Fax Provider** information if you are sending some notifications by fax.

Click **Next**.

Continue through steps 3 to 9 in the wizard and enter the appropriate information. Most, if not all of the steps will be pre-populated with the correct information. When complete, click **Finish**.
At the date and time specified in the prequalification notification, PDM will send all faxes and emails to the selected recipients.

Dear Chad Jordan,

We are in the process of bidding on a large pharmaceutical project that requires extensive contractor pre-qualification. We are interested in having your firm bid on this project. Would you please click on the following link and complete the online prequalification application so that we can include you on the Invitation-to-Bid.

Your user name is: Chad.Jordan@GJPaving.com, and your password is: Chad.

Click here to access prequalification form.

Regards,

Douglas Bower
Project Manager
Lakeline Construction
Collecting Potential Bidder Prequalification Information

When the potential bidder clicks on the link inserted into their email, they will be taken to the prequalification Web application. The email also contains the username and password that the user must enter an order to display existing information contained about the potential bidder.

Enter the User Name and Password specified in the prequalification email.
The first page displays the contact information for the user who has been invited to prequalify. The user can quickly enter any information that is incorrect, out-of-date or missing.

Enter any information that needs to be added or updated.

Click on the **Extended Profile** tab to continue entering prequalification information.
The remainder of the prequalification information can be entered in various sections of the web application. By default, PDM allows the potential bidder to enter **Company** information, **Financial** information, **References**, **Resource** information, **Safety and Risk** analysis data, and then **Review and Submit** the application.

Because it may take a significant amount of time for the user to locate and enter the information, they can click **Save and Continue** at any time and close the web application. Once they have the information necessary, they can restart the entire process by clicking on the email link.
Viewing Detailed Prequalification Information for Each Bidder

You can view the prequalification of each contact to whom you sent an invitation to prequalify.

To view a contact’s prequalification status, right click on the contact and select **Organization Prequalification Information**.

The prequalification information window opens. There is a tab for each of the screens on the web application form that the customer filled out with all of the corresponding information. You can review this information and edit it as needed.
Click the **Review** tab to set whether the person is prequalified or not.

Click **Print** to print the information.

Click **OK** to save and close the information.
Selecting Prospective Bidders for the Project

You can select the qualified bidders and add them to the project.

Open the **My Contacts** Window in PDM and the project **Contacts** window.

Select the appropriate Subcontractor Contact List on project **Contacts** tab.

Select and Drag the subcontractor Contacts from the **My Contacts** window to the appropriate project subcontractor contact list.
Defining Bid Packages

In many projects the bidding phase is divided into bidding on multiple bid packages. This allows you to break the work required for the projects into smaller, more manageable bids. Each bid package is usually for a type of work, or a phase of the project. The type of subcontractors that would bid on a bid package is usually specialized for the scope of work covered by the Bid package. For example, there is no reason for Painters to bid on a bid package that covers demolition.

Creating Bid Packages

The project administrator can create one or more bid packages for the project. Bid packages tie a group of subcontractors to a select set of project documents and a specific bid date and time. For small projects the project administrator may only create one bid package for all project documents.

To create a bid package, click the Bid Packages tab. Right click and select New.
On the **General Information** window, enter the information about the bid package. Enter a **Display Name** and **Description**. Set the **Status** to **Active**.

Enter any other information as necessary and click **Next**.

If the bid is to be submitted to a specific location, the location and time information can be defined in the **Bid Location** window. Enter the necessary information and click **Next**.
Many times there will be a pre-bid meeting to make sure all bidders start out with a good understanding of the project. Enter the bid submission location information on the **Pre Bid Meeting** window. If there will not be a pre-bid meeting, do not enter any information.

Click **Next**.

In the **Invitees** window, drag the people to whom you want to send the bid package. Drag the contacts from the **My Contacts** tab main PDM window (or any other contact window).

Enter any goals you have for the bid. This information is for reference only. Click **Next**.
In the **Scheduling** window, enter the critical dates and times for the bid package.

When complete, click **Finish**.
Organizing Bid Documents

One of the biggest strengths of PDM is its ability to manage and organize documents. During the bidding phase the general contractors struggle to make sure that all bidders have the appropriate documents to bid the project. PDM provides a number of very powerful tools to help you better prepare and organize bid documents.

Once the bid package has been created, the project administrator can add a set of folders to the bid package to organize the bid documents.

Once the Bid Package is defined, the project administrator can add project documents to the bid package as well as add additional invitees or change bid package settings.

Right Click on the bid package just created, and select Edit.
The document tab allows the project administrator to define a folder structure for the bid package documents and add project documents to a bid package.

Right Click on the bid package name and select **Create New Folder**.

Create the folder by entering a **Display Name** and **Description**. Set the **Status** to **Active**. Complete the wizard and click **Finish**.
Once your folders are created, drag documents from the main Documents tab into the package folders.

Click **OK**.
Adding Bidders to Bid Packages

Once the bid package has been defined, the project manager needs to begin selecting the potential bidders that they want to invite to bid. This process is critical to assuring that an adequate number of bids are received to assure a competitive bid amount.

PDM makes it extremely easy for Project Administrators to select potential bidders for each bid package. PDM allows the project administrator to drag and drop contacts from the main contact directory, from the project contacts, or other bid packages.

Open the Contact tab in the project window.

Undock the contact list
Drag the contacts that you want to send the bid package to from the undocked contact list to the bid package **Invitees** tab.

The contacts are added to the bid package.
Sending Invitations to Bid for a Bid Package

Once the bid package is created with the folders, documents, and contacts added, you can then send create and send the bid package notification.

To do so, right click in the Bid Packages tab and select Create Bid Package Notification.

Select Invitation to Bid as the Notification Type. Click Next.
Enter the **Display Name** and **Description**. Set the **Status** to **Active**.

Enter the **Delivery Information** for when you want to send the invitation and the **Reply To** email address. Click **Next**.

Many of the **Attributes** will be pre-populated. Enter any additional information for the attributes as needed. Click **Next**.
If you need to add or remove recipients, drag them from the main PDM window as needed. The contacts you previously added are already displayed. Click **Next**.

The HTML for the **Web Content** is for the notification. You can edit it as needed. Usually you will not have to edit anything. Click **Next**.
The HTML for the **Email Message Content** can be edited. Click **Preview Email** to see what it will look like. Usually you will not have to edit anything. Click **Next**.

The HTML for the **Fax Message Content** can be edited. Click **Preview Fax** to see what it will look like. Usually you will not have to edit anything. Click **Next**.
Enter any attachments for the notification. Click **Next**.

Review the notification and click **Finish**.
Inviting Subcontractors to Bid

When the bid package has been created, the recipients of the invitation to bid will receive an email or fax invitation. They can then go online to view and print the documents and then respond to your invitation.

Subcontractor Receives Email Invitation to Bid

The subcontractor will receive the email with the Invitation To Bid information. A link in the email will take him to the web page.

![Email Invitation Example](image-url)
Sub Reviews Bid Package in Online Plan Room

The sub is directed to the web portal that contains the bid packages and documents. When they click on the "Bid Packages" folder, a list of all bid packages that the user has been invited to bid will be displayed in the window on the right, as well as in the tree on the left.

Note: If the Bid Packages folder does not exist, then the user does not have access to any bid packages.

Click the Bid Packages folder.
Select one of the bid packages displayed under the “Bid Packages” Folder

When a user clicks on one of the bid package folders, the information about the bid package will be displayed in the window on the right. Folders that contain bid package documents will be displayed in the tree below the bid package folder selected.

In the example below, the Electrical bid package information is displayed. There has been two sets of documents issued: Initial Release and Addenda 1.
PDM will display the documents that have been assigned to the Bid Package in the window on the right. The user can view, print, or order any document from the bid package.
Subcontractor Replies with bidding intentions

Once the subcontractor has reviewed the documents the General Contractor would like them to respond as to whether they are going to bid. The Subcontractor can select the appropriate response using the combo box in the upper right portion of the window.

Select the same bid package displayed under the **Bid Packages** folder, and click on the folder icon.

The subcontractor can choose the appropriate response using the pull down menu.
Managing Subcontractor Bid Responses

You can monitor and manage the invitations that you have sent. The Invitee tab in the bid package displays the bidder’s status. You can update their responses manually if needed.

Click the Invitee tab.
To edit a bidder's responses, right click on the bidder, point to **Edit Responses** and point to **Bid Status**. Select either **Not Bidding**, **Bidding**, or **No Response**.
**Reviewing the Bidder Coverage**

You can check the bid to determine if adequate bids are going to be received for each bid package. If this project requires a defined level of minority participation then it is also important to review the number and percentage of bidders that will be submitting bids as minorities.

Open the **Bid Package**, and click the **Invites** tab. Select **Construction Codes** in the **Group By** list. You can then click on the tabs on the left to view the bid coverage and responses from the different disciplines.
**Bid Package Report**

You can run a bid package report to monitor responses and bid information.

To do so, click the **Reports** tab. Right click on the **Bid Package Status Report** and click **Generate**.

This report provides an easy to read listing of every bid for this project. It provides a summary of the entire bid including package name, key dates and summary of current status of the invitees. It provides a detailed list of all the invitees, with their key contact information.
and their current bid status.

**Processing an Addenda**

When an addenda is released, the addenda should be added to the bid package so that bidders can review the documents that have been changed.

PDM allows the project administrator to add a folder to the bid package documents that contains all of the addenda documents.

Right Click on the bid package folder and select **Create New Folder**.
Enter the display name and the rest of the appropriate information.
To add addendum documents to the bid package PDM allows the user to drag documents from the project documents window to the bid package window.

Select the Documents tab and Addenda Folder in the project details window.

Drag the appropriate addenda documents from the addenda folder on the project to the bid package's addenda folder.
The documents will be displayed in the bid document addenda folder.
Once the addenda folder has been created and populated, a notification of addenda should be sent to the bidders.

Right click on the Addenda folder and select **Send Notification with Folder Link.**
**Awarding the Bid Package**

Once all of the subcontractor's bids have been received and a decision made, the bid package can be closed and awarded.

To award the bid package, go to the Invitees tab for the bid package. Right click on the contact to whom you want to award the bid and select **Award**. The bid is awarded to the contact.
To view the awarded bid, click the **Awarded** tab.
MANAGING USER SETTINGS

Managing My Account

You can update your contact and administrative information on the My Account tab. This allows you to maintain your own information without the involvement of a system administrator.

To manage your account, click the My Account tab.

Enter or change any information on the Duplicate Key, Organization and Location, Contact Information, Contact List, Attributes, or Private tabs.