PDM Guide

PDM Bidding User Guide

Authored by:
## CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PDM BIDDING OVERVIEW</strong></td>
<td>5</td>
</tr>
<tr>
<td>Glossary</td>
<td>7</td>
</tr>
<tr>
<td>Printing</td>
<td>9</td>
</tr>
<tr>
<td>Navigating PDM Bidding</td>
<td>9</td>
</tr>
<tr>
<td>PDM Bidding Administration Functions</td>
<td>15</td>
</tr>
<tr>
<td>Plan Room Owner VS. Bidder View</td>
<td>16</td>
</tr>
<tr>
<td>Permissions</td>
<td>18</td>
</tr>
<tr>
<td>Customize Your Plan Room</td>
<td>20</td>
</tr>
<tr>
<td>Archive Administration</td>
<td>21</td>
</tr>
<tr>
<td>Removing Users from PDM Bidding</td>
<td>23</td>
</tr>
<tr>
<td><strong>My Projects Tab Overview</strong></td>
<td>23</td>
</tr>
<tr>
<td><strong>Private Directory Overview</strong></td>
<td>23</td>
</tr>
<tr>
<td><strong>Construction Codes Tab Overview</strong></td>
<td>24</td>
</tr>
<tr>
<td><strong>Administration Tab Overview</strong></td>
<td>25</td>
</tr>
<tr>
<td><strong>Reporting Tab Overview</strong></td>
<td>26</td>
</tr>
<tr>
<td><strong>My Account Tab Overview</strong></td>
<td>27</td>
</tr>
<tr>
<td><strong>PROJECT MANAGEMENT</strong></td>
<td>28</td>
</tr>
<tr>
<td>BMS Hosted Projects Overview</td>
<td>28</td>
</tr>
<tr>
<td>Plan Room Owner's View of PDM Bidding</td>
<td>29</td>
</tr>
<tr>
<td>Public VS. Private Hosted Projects</td>
<td>30</td>
</tr>
<tr>
<td>Hosted Project Phases</td>
<td>31</td>
</tr>
<tr>
<td><strong>My Private Directory of Contacts</strong></td>
<td>32</td>
</tr>
<tr>
<td>Private Directory Overview</td>
<td>32</td>
</tr>
<tr>
<td>Add a Company to My Private Directory</td>
<td>33</td>
</tr>
<tr>
<td>Primary Company Contact</td>
<td>34</td>
</tr>
<tr>
<td>Explanation of Company Contact Fields</td>
<td>35</td>
</tr>
<tr>
<td>Edit a Company</td>
<td>37</td>
</tr>
<tr>
<td>Copy a Company</td>
<td>38</td>
</tr>
<tr>
<td>Delete a Company</td>
<td>39</td>
</tr>
<tr>
<td>Create a Group</td>
<td>39</td>
</tr>
<tr>
<td>Edit a Group</td>
<td>40</td>
</tr>
<tr>
<td>Delete a Group</td>
<td>41</td>
</tr>
<tr>
<td>Send Message to Bidders</td>
<td>41</td>
</tr>
<tr>
<td>Import Company Contacts</td>
<td>44</td>
</tr>
<tr>
<td>Print Company Contacts</td>
<td>46</td>
</tr>
<tr>
<td><strong>How to Access the plan room</strong></td>
<td>47</td>
</tr>
<tr>
<td>Add a New Hosted Project within PDM Bidding</td>
<td>48</td>
</tr>
<tr>
<td>Transfer an Existing Network Project</td>
<td>52</td>
</tr>
<tr>
<td>Edit a Hosted Project's Details</td>
<td>54</td>
</tr>
<tr>
<td>Explanation of Add/Edit Project Details Fields</td>
<td>55</td>
</tr>
<tr>
<td>View &amp; Print a Hosted Project's Details</td>
<td>58</td>
</tr>
<tr>
<td>Copy a Hosted Project</td>
<td>58</td>
</tr>
</tbody>
</table>
Delete a Hosted Project 59
Archive a Hosted Project 60
Manage Hosted Project Activities 61
  Details View 63
  Status View 63
  Bid Documents View 63
  Bid Package View 64
  Bidding Overview 64
  Bid Package Overview 65
  Define & Add a Bid Package 65
  Edit Bid Package Details 68
  Delete Bid Packages 69
  Prequalification Overview 69
  Private Projects & Prequalification 70
  Public Projects & Prequalification 71
  Update Bidder Prequalification Status 73
  Change in Prequalification Requirement 74
  Bid Documents Overview 76
  Upload Bid Documents 77
PDM BIDDING OVERVIEW

The PDM Bidding Application is an easy-to-use online, collaborative environment that facilitates the bidding process between general contractors and subcontractors. You can access the system in a variety of ways through the McGraw-Hill Construction Network (MHC) with a single sign-on ID.

Entry into PDM Bidding is via My plan room, a secure segment of the MHC Network that allows:

- General contractors ("Plan Room Owners") to host projects, distribute project information and bid documents to potential bidders, manage a private directory of subcontractor companies, communicate with bidders, facilitate the bidding process, and run reports across projects.

- Subcontractors ("Bidders") to access project and bid package details and interact with plan room owners throughout the bidding process.

Each plan room is associated directly with one BMS license, but can be set up with multiple plan room owners. However, only the administrative plan room owner can assign permissions for other owners to perform specific tasks and access certain areas of the plan room.

**Note:** There is only one administrator per plan room.

Bidders (including MHC editorial staff) must be invited, and when invited are only allowed limited access, as determined by the owner, to specific project and bid information for the bid packages to which they are invited.

Public projects allow access without an invitation, but once accessed, the bidder is automatically invited to the project.

PDM Bidding is comprised of the following main methods for plan room owners to manage the bidding process:

**Manage Status**

Plan room owners will manage correspondence and update the status of bidders through the Inbox, Sent Items, and Bidder Status tabs.

**Manage Project Details**

From this area, plan room owners perform tasks such as viewing project details, adding bid packages, bid documents, and can also notify bidders of changes to the project.

**Edit Project Details**

This area enables plan room owners to edit the project, itself, including description and contact information.
NOTE: Only plan room owners with appropriate permissions can modify information. Others can perform certain specific tasks. For details, see the Permissions topic.

PDM Bidding is comprised of four main areas:

Projects

Hosted

Hosted projects enable plan room owners to facilitate bidding on projects, and provide an interface for communication with bidders, providing online or faxed bid documents and sharing information about the bid.

Invited

When prospective and invited bidders enter PDM Bidding, they will see a list of projects to which they have been invited as well as associated information regarding their status. From the Invited, you can proceed to invited bid packages and project details, as well as your project Inbox (if you have been invited to a project).

Projects can exist in one of four different stages:

- Setup
- Active
- Inactive
- Archive.

The license for a plan room dictates how many projects a plan room is allowed to have in total.

Bid Package

A bid package contains all necessary project details, specific bidding details, and bid documents necessary for the bidder to bid on the project. One project can contain one or more bid packages, and each bid package can contain any or all bid documents in a project.

Private Directory

Every plan room has one private directory that is shared by the plan room owners. This private directory is similar to the general contractor’s subcontractor list. It is a directory of company information from which the plan room owners invite bidders to bid on their projects. This directory does not store project or bid-related information, and is limited to company contact information and details only.
Each company is required to be assigned one or more CSI codes. These CSI codes will be used to simplify the process when matching companies in the private directory to a bid package (each bid package is also assigned one or more CSI codes).

Administration

The plan room administration area is available only to the administrative plan room owner. The administrative plan room owner assigns plan room owner permissions, customizes the plan room, and manages their archive space. The administration plan room owner is specified on PDM Bidding contract.

Reporting

Reporting is available in the plan room across projects and is available only to plan room owners with the manage reports permission. The following reports are available:

- Directory Wide Bidding History
- Company Bidding History
- Fax Usage
- Project Bid Document Activity
- Project Bidding
- Plan room Adoption Metrics
- System Reports (for MHC, not plan room owner)

Each report has settings allowing each plan room owner to customize the results.

Glossary

**Bid Documents**

Bid documents are digital files that are added to a project hosted in the plan room. These documents are categorized as plans, specs, addenda, or other and can be added to bid packages as appropriate. These documents can be uploaded to the system from an owner’s computer, transferred from an existing Network project, or can be scanned in by Xerox and added to the project if digital files are not available.

**Bid Package**

A bid package contains all necessary project details, specific bidding details, and bid documents necessary for the participant to bid on the project. One project can contain one or more bid packages, and each bid package can contain any or all bid documents in a project. The bid package is what the invited participant sees when they access an owner’s project. Bidder A bidder, as referred to in this document, is an invited company to a project's bid package, hosted in a plan room. The contact person views one or more bid packages in a project and prepares to bid on said project. They can be invited in one of two ways: a private invitation from the owner, a public invitation (project open for bidding to all McGraw Hill Construction (MHC) Network
members). In the construction world this person would normally be in the role of subcontractor.

**Grid**
The term used to describe the section of screens containing records. For instance, the My Projects screen contains a list of information about each project, such as the name, the phase, # of invitations, etc. Each column is labeled and the associated information relating to each project is listed.

**Hosted Project**
The hosted project contains bid documents and bid packages associated with a construction project. Bid-related communication is tracked within the hosted project in the PDM Bidding application. A plan room may have as many projects as allowed by the PDM Bidding license.

**MHC**
McGraw Hill Construction

**Notification**
A notification is a bid-related communication between the plan room owner and the bidder from within the PDM Bidding application. The notifications are sent as emails or faxes, depending on the contact information provided in the company’s profile. If an email address is provided, email notifications will be sent. If no email address is provided, faxes will be sent.

**Plan Room**
The plan room is a secure segment of the McGraw-Hill Construction Network that allows general contractors to host projects, distribute project information and bid documents to potential bidders, manage a private directory of subcontractor companies, communicate with bidders, and facilitates the bidding process. When prospective and invited bidders enter PDM Bidding plan room, they will see a list of projects to which they have been invited as well as associated information regarding their status.

**Plan Room Owner**
An owner, as referred to in this document, is the owner of the plan room. This person is hosting a project and putting that project out for bid. In the construction world this person would normally be in the role of general contractor.

**Private Directory**
This private directory is akin to the general contractor’s subcontractor list. It is a directory of companies from which the owner can invite participants to bid on their projects. This directory does not store project or bid-related information, and is limited to company contact information and details. Every plan room has one private directory that is shared by all plan room owners.

**Private Project**
A private project is a hosted project that is only available to invited bidders. Anyone not invited must request access from the project owner in order to obtain access.

**Public Project**
A public project is a hosted project that is available to all members of the McGraw-Hill Construction Network. No invitation is required to obtain access to the project.
SSO Single Sign On
The authentication used for the McGraw-Hill Construction Network

Printing
The PDM Bidding Application offers the ability to print lists, grid results and reports. Selected information will be copied or converted to a printer-friendly version, which will open in a new window. The printer-friendly version will automatically be sent to the user’s selected printer.

If printer options need to be set, the user will have to set the printer options before printing is complete. When printing multiple pages from the results screen, all pages will be converted and printed as one long page.

The Print button is available on many PDM Bidding screens.

NOTE: The Print button displays on the top and bottom of the screen to make printing easier for you for you need to scroll to the bottom of the page when there is a lot of data.

Navigating PDM Bidding
PDM Bidding is accessed through the My plan room tab on the McGraw Hill Construction Network (MHC) main menu. Navigation through the system is similar to the MHC Network navigation.

Tabs
There are tabs across the top of every MHC Network page. To access PDM Bidding, click the My plan room tab. The My Projects screen displays. For plan room owners, the default view is Hosted. For bidders, the default view is Invited.
If you are an MHC Network user and have no BMS license, when you click the My plan room tab, you will see information on how to become a plan room owner and host projects.

Once in the PDM Bidding application, tabs are used to navigate the functional areas within the application.

Within PDM Bidding, there are the following tabs

- **My Projects** – manage project information. Within the project you can create bid packages, maintain documents for each package, control responses from sub contractors.
- **Private Directory** – manage your contact information. Set up contacts with assigned construction codes, maintain contact information, set up prequalification information.
- **Construction Codes** – manage construction codes. Import, add, delete and assign construction codes.
- **Administration** – For users with Admin privileges. Allows admin to add users to the application and assign appropriate rights and privileges.
- **Reporting** – Ability to run system level reports.
- **My Account** – Administer the information surrounding your account. ID, password, queue maintenance of all transferred data from the MHC Network.

**Load Projects Controls**

Directly underneath the navigation line is the Load projects drop-down box, which provides different functionality for plan room owners and bidders.
**Plan Room Owner Controls**

Plan room owners can access hosted projects, add new hosted projects and, if granted manage project permission, edit project details as well. Here is a list describing the functionality of the Load projects control for plan room owners:

The Load projects field defaults to Add New Hosted Project. Click the Go button to go to the Add New Hosted Project screen.

When you click the down arrow, your hosted projects display. Select one of the projects and click the Go button to access the Manage Details screen for the project. From there, you can perform activities associated with the project, such as creating bid packages and uploading bid documents.

Select a project from the Load projects drop-down box and click the Edit button to access the Edit Project Details screen where you can alter project information such as contacts and a description of the project. Plan room owners without the manage projects permission can alter the details of the project. Other plan room owners can view this project information, but not modify it.

Only plan room owners will see an Edit button.

**Bidder Controls**

Bidders can access a project to which they were invited (or to which they have self-invited themselves by entering a public project) from the Load projects control.

NOTE: bidders will not have an Edit button available in their controls.

![PDM Bidding User Guide](image)

Below the Invited tab, all projects to which the bidder is invited, and to which their bidding status for at least one bid package is Bidding or Pending will be listed. When one of these projects is selected, the “Go” button becomes active (blue) and when clicked takes the bidder to the View Status Inbox screen for the selected project.

**Sorting**

Most of the screens in PDM Bidding have information displayed in rows. You can sort the displayed data in order of any of the columns by clicking on the column. Only the column by which the information is sorted will display the
arrow, which will either face up or down. Each time you click, the order will switch.

To sort alphabetically in ascending order, the arrow will face up.

<table>
<thead>
<tr>
<th>Project Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Project For Sharing Dodge Network</td>
</tr>
</tbody>
</table>

To sort alphabetically in descending order, the arrow will face down.

<table>
<thead>
<tr>
<th>Project Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zion Chapel Senior Center (Pre-Engineered)</td>
</tr>
<tr>
<td>Ziegler Elementary School Addition (Little School House)</td>
</tr>
</tbody>
</table>

Hosted View
When plan room owners with hosted projects enter PDM Bidding, they immediately view the My Hosted Projects tab, where all their projects are listed in their plan room.

Invited View
When bidders who have been invited to hosted projects enter PDM Bidding, they will immediately see the My Invited Projects screen, and will be in the Invited view, which displays a list of their invited projects. From there, they can access their Inbox.

NOTE: If bidders are also hosting projects, clicking on the Hosted tab will display all currently hosted projects. If the bidder is not hosting any projects, the Hosted grid will be empty.
Find a Hosted Project for Bidders

The Find Hosted Project feature is only available on bidder screens displaying invited projects to an invited bidder. Plan room owners viewing hosted projects will not see this control.

Plan room owners are not given a find hosted projects control.

From the View Project Details screen, type the unique project key (assigned automatically by PDM Bidding when the hosted project is created or transferred from the Network) in the Find a Hosted Project field.

Click the Find button. If the bidder has been invited to the project or if the project is a public project, the bidder will be taken to the View Project Details screen for the project.

If the bidder has not been invited to the project (or has been uninvited to a project), and that project is a private project, a message displays indicating that the user does not have access to the found project and will be given the option to request access from the plan room owner.

Carat Indicator

A carat indicator displays next to each choice in a list when multiple options are available. A single click in a row will generate a checkmark. Clicking again will remove the indicator from the row.
<table>
<thead>
<tr>
<th>Project Name</th>
<th>Project Phase</th>
<th>Invitations</th>
<th>Responses</th>
<th>Bids Received</th>
<th>Project Bid Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Project For Shaping Dodge Network</td>
<td>Active</td>
<td>7</td>
<td>3</td>
<td>0</td>
<td>08/30/2007 04:30 PM</td>
</tr>
<tr>
<td>Portable Bldg Innovation Old Towns Program (Fremont Campus)</td>
<td>Setup</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>02/24/2008 02:00 PM</td>
</tr>
<tr>
<td>Single-Family Residential Subdivision</td>
<td>Setup</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>06/19/2004 02:00 PM</td>
</tr>
<tr>
<td>Ziegler Elementary School Addition (Little School House)</td>
<td>Setup</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>02/22/2006 02:00 PM</td>
</tr>
<tr>
<td>Zion Chapel Senior Center (Pre-Engineered)</td>
<td>Setup</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>02/22/2006 02:00 PM</td>
</tr>
</tbody>
</table>
PDM Bidding Administration Functions

The plan room administration area is available only to the administrative plan room owner, who uses this feature to assign plan room owner permissions, customize the plan room and manage archive space. The administrative plan room owner is indicated on the PDM Bidding contract.

Note: There is only one administrator per plan room.

There are three functions within the Administration feature:

- Permissions
  The administrative plan room owner grants permission to modify company information, transfer hosted projects to and from the Network, and upload documents.

- Customize
  There is some flexibility for administrative plan room owners to customize their plan room, such as uploading an image (typically the company logo) to be included on all fax cover sheets and in all emails generated by PDM.

- Archive Administration
  Projects may be archived by any plan room owner with Manage Projects permission based on available purchased archive storage space. The total archive storage space for a plan room is determined by the amount purchased. The total size of the bid documents uploaded to all of the archived projects must be less than the licensed archive storage space.

  Note: Only the Administrative owner can restore archived projects.

To Access Administration:

Click Administration from the My Plan Room Links menu on the left side of the screen.
Plan Room Owner VS. Bidder View

Plan room owners and bidders navigate and view screens differently in the PDM Bidding application.

Plan Room Owner View

Plan room owners view PDM Bidding from the vantage point of hosted projects, and depending on the status of the project (Active, Inactive, or Setup), the view may display differently.

Load Projects

When a plan room owner enters the plan room, the Load projects control displays. Depending on their permissions, plan room owners can add new hosted projects, edit project details, and manage bidding for an existing project.

Hosted Projects List

Below the Load projects control is a list of the plan room owner’s hosted projects. If there are no hosted projects, instructions on hosting projects will display. When plan room owners enter PDM Bidding, this is their initial view.

NOTE: If plan room owners are bidders as well, clicking the Invited tab will display the list of projects to which they have been invited. Otherwise, instructions on becoming a bidder display.
Active Projects

When plan room owners select an existing Active project, they can click either the name of the hosted project from the list or the Edit button. Either will display the Edit Project Details screen, where plan room owners modify information about the project (e.g., description, address).

Set-up/Inactive Projects

Inactive projects can be those which have ceased development for the present or projects which have bid. In the Setup phase, the plan room owner is developing the hosted project description, bid packages, and other activities, such as setting up the private directory.

In both cases, no communication can occur between plan room owners and bidders.

Selecting an existing inactive project or project in set-up, clicking either the name of the hosted project from the list or the Go button will display the Manage Project Details screen. When plan room owners select an existing Inactive project or project in set-up, clicking the Edit button will display the Edit Project...
Details screen, where plan room owners modify information about the project (e.g., description, address).

**Bidder View**

Bidders view PDM Bidding from the invited projects point of view. They will see a list of projects to which they have been invited when first entering PDM Bidding. If this is the first time the bidder has accessed the service, or if the bidder has no hosted projects, instructions on bidding will display. Bidders can access a project to which they were invited (or to which they have self-invited themselves by entering a public project). From this field, bidders select the function they want to perform on their invited projects.

NOTE: If bidders are plan room owners as well, clicking the Hosted tab will display the list of their hosted projects. Otherwise, instructions on hosting projects display.

All projects to which the bidder is invited, and to which their bidding status for at least one bid package is Bidding or Pending will be listed. When one of these projects is selected, the “Go” button in the Load projects control becomes active (blue) and when clicked takes the bidder to the View Project Details screen for the selected project.

Note: For bidders, there is no “Edit” button.

Permissions

The administrative owner grants permission to other plan room owners to perform tasks in PDM Bidding. If a plan room owner does not have the appropriate permission to perform an action, the option button or link for that task (e.g., edit project details) will be grayed out and inactive for the user. All plan room owners are listed on the Permissions screen. You check the box for which permission to allow an owner.
NOTE: The administrative plan room owner will not be displayed in the list of users to which permissions are granted, as the administrative owner has full permission for all tasks. If there is a new administrative owner, the new owner's information must be changed on PDM Bidding license by contacting McGraw-Hill Construction (MHC) Network technical support at 1-800-393-6343. NOTE: The Permissions screen is the default view in the Administration area.

To Access Permissions:

Click the plan room tab from the main menu. Click on the Administration tab at the top of the screen.

In the Permissions view of the Administration screen, click the checkbox next to each person for whom you want to grant permission to perform the selected task. When you are finished, click the Update button.

NOTE: Permissions do not take effect until after you click the Update button.

Below is an explanation of available permissions:

**Directory**

This permission allows owners to make changes to My Private Directory for the plan room. This includes copying contacts, adding contacts, editing contacts, managing groups, transferring contacts, printing contacts, and deleting contacts.
Plan room owners without Manage Directory permission will still be able to view My Private Directory and send messages to contacts.

**Codes**

This permission allows owners to make changes to construction codes for the Bidding application. This includes adding, editing, importing, deleting, and assigning codes to contacts.

**Projects**

Authorized owners can add new projects, copy projects, transfer projects from the McGraw Hill Construction Network (MHC), edit or delete projects, and send notifications to project bidders. Plan room owners without this permission will still be able to view and print project details.

**Bid Documents**

If allowed, owners can upload, scan (if scanning is enabled for this plan room), or delete bid documents. Plan room owners without this permission may still view, download, and order hard copy files.

**Bid Packages**

Owners with this ability can add new bid packages, edit and delete bid packages, add and remove bid documents to/from bid packages, invite and un-invite bidders, update bidder status, send notifications to bidders, and award a winning bidder.

Plan room owners without this permission may preview existing bid packages, order hard-copy bid documents for a bid package, and view messages from bidders, invitations to bid, qualifications, notifications, and faxes.

**Reports**

Permitted owners can run BMS reports.

Plan room owners and bidders without reports permission will not be able to access the reporting area of PDM Bidding. If you have permission to access this area, you will be able to configure and filter report results.

**Customize Your Plan Room**

The administrative plan room owner can customize the plan room through the Customize tab in the Manage Administration screen in the following ways:

You may upload an image (typically a company logo) to be included on all fax cover sheets generated by the Bid Management Service (BMS), or, alternatively, may specify heading text.
to include on the cover sheets. This logo will also be used in email notifications sent to bidders. The logo size and file type must be in GIF or JPG format, and can be up to 500 pixels wide and up to 68 pixels wide.

Note: These specifications are also listed on the Customize screen.

![Customize Screen](image)

Note: If you do not upload a company logo, the company name will be displayed on system-generated email and faxes in its place.

The Administrator has the ability to choose which FAX Service is available for use in PDM Bidding. Currently, there are three services available for selection

1. GreenFax
2. EFax
3. EasyLink

The Administrator has the ability to select the default time zone associated with projects and bid packages created within the application.

**Archive Administration**

Projects may be archived based on available storage space. The archive storage space for a plan room is purchased separately and indicated on the PDM Bidding license. The total size of the bid documents uploaded to all archived projects must be less than the licensed archive storage space.

NOTE: Archived projects can also be restored and deleted.

Plan room owners can archive project from the My Projects, Hosted tab:
To Archive a Hosted Project from My Projects:

1. From the main menu, click My Plan Room
2. Click on My Projects tab.
3. Click the Load Projects down arrow and select a hosted project to archive or select project from the List.
4. Click the Archive button.
5. The Project is removed from the Active My Projects list.

To Delete Archive Projects:

Note: Once deleted, hosted projects are not recoverable.

1. From the main menu, click My Plan Room
2. Click on Authorization tab.
3. Click the Archive tab
4. Select Project to Delete from the Archive list.
5. Click the Delete button.
6. The Project is deleted and no longer available to be restore

Note: Only the Administrator can delete or restore archived projects.

To Restore Archive Projects:

The administrative owner can only restore an archived project if there is available space on the PDM Bidding license for an additional hosted project. If no space is available, the administrative owner has to either delete a project to make room for the restoration, or purchase additional project space.

1. From the main menu, click My Plan Room
2. Click on Authorization tab.
3. Click the Archive tab
4. Select Project to Restore from the Archive list.
5. Click the Restore button.
6. The Project is restored to the My Projects tab and is available for use.
Removing Users from PDM Bidding

When a user leaves the company, the first thing you should do is go to the McGraw-Hill Construction Network PDM Bidding Administration link and de-select the granted privileges for that user. Click the update button to save the changes. Note: Only the PDM Bidding licensed administrator can perform this task.

Next, you must call tech support at 800-393-6343 to have the user removed from the PDM Bidding license.

My 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.

Private Directory Overview

Click the Private Directory tab.
The Private Directory 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 Bidding 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 Bidding is capable of supporting MasterFormat 95 or MasterFormat 04 but not both at the same time.

**Construction Codes Tab Overview**

Click the **Construction Codes** tab.

The Construction Codes tab allows you to manage and organize your own construction codes. PDM Bidding allows you to easily add, edit, delete, import, search and assign construction codes to be used throughout the PDM Bidding functionality.
Administration Tab Overview

Click the Administration tab.

The plan room administration area is available only to the administrative plan room owner, who uses this feature to assign plan room owner permissions, customize the plan room and manage archive space. The administrative plan room owner is indicated on the PDM Bidding contract.

Note: There is only one administrator per plan room.
Reporting Tab Overview

Reporting is available in the plan room across projects and is available only to plan room owners with the manage reports permission. The following reports are available:

- Directory Wide Bidding History
- Company Bidding History
- Fax Usage
- Project Bid Document Activity
- Project Bidding
- Plan room Adoption Metrics

Each report has settings allowing each plan room owner to customize the results.
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.
**PROJECT MANAGEMENT**

*BMS Hosted Projects Overview*

PDM Bidding plan room houses multiple hosted projects. Hosted projects are those containing bid documents and bid packages associated with a construction project. Bid-related communication is initiated and tracked within the hosted project.

Each hosted project can exist in one of four phases:

- **Setup** - During the Setup phase, the plan room owner defines the hosted project and develops the bid packages.
- **Active** - All bidding and plan room owner/bidder interaction occurs in the Active phase
- **Inactive** - The Inactive phase is when the project has been placed on hold. During the Setup phase, the hosted project is also considered Inactive.
- **Archive** - Usually, completed or cancelled projects are archived. Plan room owners must have purchased space to archive projects.

The PDM Bidding license dictates how many hosted projects a plan room is allowed to have in total.

Hosted projects can also be distinguished as public or private.

- **Public** hosted projects are available in the bidder view to any member of the McGraw Hill Construction Network (MHC). This type of hosted project is normally shared with McGraw-Hill editorial staff and available in the Network as a searchable project.
- **Private** hosted projects are available to invited bidders only. Anyone who does not possess an invitation must request access from the plan room owner.

**NOTE:** The default setting is private for new hosted projects.

Hosted projects contain an area for managing the bidding process called Manage Projects. Plan room owners use this area to manage the bidding process, which consists of the following tasks

- **Manage bidder status** - Update changes to bidders' standing in the process:
  - Whether they will be bidding (per their response to the invitation) or not bidding
  - If applicable, whether they are prequalified (may be prequalified for all projects or have submitted prequalification on this bid, which was accepted by the plan room owner) or not prequalified
  - Updating whether their bid has been submitted and/or if bidder was awarded the bid
• Manage project details - View details about your hosted project, create bid packages and add bid documents

• Edit project details - Modify the actual information, contact information, and description of your hosted project. For example, change CSI codes, address, and status of project.

• Manage bid packages - Create, modify, and delete project bid packages (comprised of bid documents) for projects

• Manage bid documents - Upload and associate various types of files with bid package(s), including plans, specs, addenda, and miscellaneous files

• Manage correspondence with bidders - Correspondence includes:
  o Inviting bidders to bid
  o Awarding bidders
  o Notifying bidders of changes to project, addenda to bid packages, etc.

From My Projects, with the necessary permissions, plan room owners can access the following features:

• Add (new project)
• View (project details, display only)
• Edit (project information)
• Update (request updated project information from MHC Network. Transferred projects only)
• Copy (a project)
• Notify (alert bidders to updates and addenda)
• Archive (dependent on space and licensing)
• Delete (projects)

**Plan Room Owner's View of PDM Bidding**

Plan room owners view the PDM Bidding from the vantage point of hosted projects. When entering PDM Bidding, the Hosted Projects view is their initial view.

Hosted projects contain an area for managing the bidding process called Manage Hosted Projects. Plan room owners use this area to manage the bidding process, which consists of the following tasks

• Manage bidder status - Update changes to bidders' standing in the process:
  o Whether they will be bidding (per their response to the invitation)
If applicable, whether they are prequalified (may be prequalified for all projects or have submitted prequalification on this bid, which was accepted by the plan room owner)

Updating whether their bid has been submitted

- Manage project details - View details about your hosted project, create bid packages and add bid documents
- Edit project details - Modify the actual information, contact information, and description of your hosted project. For example, change CSI codes, address, and status of project.
- Manage bid packages - Create, modify, and delete project bid packages (comprised of bid documents) for projects
- Manage bid documents - Upload and associate various types of files with bid package(s), including plans, specs, addenda, and miscellaneous files
- Manage correspondence with bidders - Correspondence includes:
  - Inviting bidders to bid
  - Awarding bidders
  - Notifying bidders of changes to project, addenda to bid packages, etc.

From My Projects, with the necessary permissions, plan room owners perform the following tasks:

- Add (new project)
- View (project details, display only)
- Edit (project information)
- Update (request updated project information from MHC Network. Transferred projects only)
- Copy (a project)
- Notify (alert bidders to updates and addenda)
- Archive (dependent on space and licensing)
- Delete (projects)

NOTE: The Invited tab will display any projects to which the plan room owner has been invited to bid.

Plan room owners can access My Private Directory, the area where all bidder contact information is stored from the My plan room links on the left side of most screens in PDM Bidding.

**Public VS. Private Hosted Projects**

Projects hosted in PDM Bidding are either public or private.
Public hosted projects can be viewed by any member of the McGraw Hill Construction (MHC) Network. This type of hosted project is normally shared with McGraw-Hill Editorial and a link to these types of hosted projects will be available from the MHC Network. Companies who access a public hosted project in PDM Bidding are automatically allowed to view the project and must follow the same procedures as those who are invited by the plan room owner.

Private hosted projects are available to invited bidders only. Any company without an invitation must request access from the plan room owner (this is the contractor). An option to request access from the plan room owner will be displayed the first time you attempt to access a private project.

Below is a screen shot of the Request for Access form.

**Request Access - CIA Garage**

The CIA Garage project hosted by XYZ Contractors requires that you be invited to bid in order to access it. There is not an existing invitation for your email address. Use this form to request an invitation to bid from the project contact.

After filling out the form, bidders will click the Request Access button to submit the request to the plan room owner.

For information on how to search for a BMS hosted project from the MHC Network Network, see the topic Find an MHC Project that is Hosted in PDM Bidding.

For information on how to search for a BMS hosted project inside PDM Bidding, see the topic Locate a Hosted Project from PDM Bidding.

**Hosted Project Phases**

Hosted projects in PDM Bidding can be established in different phases. You determine the phase of a hosted project during initial setup, and you can also change the status from the Edit Project Details screen.

The phases are:
Setup
During setup, plan room owners define, maintain, and prepare their hosted projects for bidding. No bidder access or communication between plan room owners and bidders is allowed during this phase.

Active
The active phase allows communication and bidder access. All bidding and owner/bidder interaction occurs during this phase.

Inactive
As with the setup phase, there is no communication allowed between the plan room owner and bidders. Hosted projects may be inactive for a variety of reasons, including reworking of the project before bidding is allowed.

NOTE: Hosted projects in the Setup phase are also considered Inactive.

Archive
The Archive phase may only be used if archive space has been purchased by the PDM Bidding license-holder. Generally, completed hosted projects or cancelled hosted projects are archived.

To archive a hosted project, you can choose the status in the Edit Details screen to begin the process or begin the archive process from the My Projects screen.

My Private Directory of Contacts
Private Directory Overview
The Private Directory is the master list of company/subcontractor information and contacts whom plan room owners invite to bid on their projects and with whom they communicate throughout the bidding process. The private directory does not store project or bid-related information.

Each contact must provide an email address and/or a fax number. Email will be the default method of communication. Furthermore, no two contacts can use the same email address. Each contact must have a unique email address.

NOTE: Communication will be either via email, if the company has access to the Internet, or fax, if not.

Only plan room owners with Manage Directory permission are able to make changes to the Private Directory. This includes the ability to add companies, copy companies, edit companies, manage groups of companies, transfer companies, or delete companies. Plan room owners without Manage Directory permission will only be able to view the directory and send email to company contacts.

To Access the Private Directory
Click on the Plan room tab, click on Private Directory tab.
A company must be in the plan room’s private directory in order to be invited to bid on a project.

**Add a Company to My Private Directory**

Adding new companies to the private directory is one of the primary tasks completed in the private directory. Companies can be added in the following ways:

1. The plan room owner can manually add one company at a time by clicking the Add button.
2. They can transfer a list of companies and associated details in the same manner that contacts can be exported to Windows from Outlook using a comma separated value file.
3. Transfer companies from the MHC Network directly into your Private Directory.

NOTE: If a company is already qualified to bid on your projects, you can mark them as prequalified for all projects. This will cause the bidders to be marked as qualified when selected for an invitation. However, you can over-ride the default for an individual bid package.

**To Add a Company Manually**

1. Click on Plan Room tab, click on Private Directory tab.
2. Click the Add button.

NOTE: The Manage Private Directory screen displays two sections. The top half displays companies bidding on your hosted project. The lower half of the screen represents companies who are not yet in your Private Directory who have accessed public projects. Companies who have accessed public projects are considered invited to bid on the associated bid packages. Such companies can be added to the private directory.

3. Click on Plan Room tab, click on Private Directory tab.
4. Click the Add button.

NOTE: The Manage Private Directory screen displays two sections. The top half displays companies bidding on your hosted project. The lower half of the screen represents companies who are not yet in your Private Directory who have accessed public projects. Companies who have accessed public projects are considered invited to bid on the associated bid packages. Such companies can be added to the private directory.
to bid on the associated bid packages. Such companies can be added to the private directory. For details, see the topic Companies Not in My Private Directory.

5. Follow the prompts on the screen to create the new company. An asterisk (*) displays next to required fields. See the topic Explanation of Company Contact Fields for details on filling out the form.

6. When you are finished entering company information, Click the Save button.

Importing Contacts

Please refer to the section entitled Import Company Contacts.

Transferring Contacts

A contact can be added from the MHC Network to the Private Directory of the PDM Bidding application. A user will have to have a MHC Network license in order to transfer companies.

To transfer a company into the PDM Bidding application:

1. Locate a company in MHC Network via the Project or Company Search.

2. Click on the Checkbox next to the company contact to transfer, you can select multiple contacts from the list.

3. Click on the Host button.

4. The information about the contacts selected are transferred into your Private Directory

Primary Company Contact

Each company listed in an individual plan room's private directory has one primary contact. PDM Bidding generates communication with the primary contact in one of two ways:
1. Via email for companies with Internet access
2. Via fax for companies without access to the Internet or who prefer doing business in this manner

**NOTE:** If no email address is listed for the primary contact, PDM Bidding will automatically deliver correspondence via fax. Email will be the default mode of communication.

If an email and fax number are both listed, email will still be the default method of communication. Faxed communication will only be the default if there is no email address.

Within one plan room's private directory, each company **must** have its own unique contact method. In other words, two companies within one private directory cannot share an email address. However, contacts **can** share a fax number.

As there is no link between plan rooms, companies can use the same email address in separate plan rooms.

For example, ABC Construction is in the private directory of both Plan Room A and Plan Room B and uses info@abc.com as the contact method. ABC Construction can use info@abc.com in each private directory. However, Smith Building Supplies, who is in both of the same private directories as ABC Construction, cannot use info@abc.com as their contact method.

**NOTE:** The primary contact cannot be edited unless the plan room owner has been assigned the manage directory permission.

**Explanation of Company Contact Fields**


**Contact Information**

This section contains all information for the primary contact in the company.
Required fields:
1. First Name
2. Last Name
3. E-mail
4. Company Name
5. State
6. Country
7. Fax

Miscellaneous Information
This section is for prequalifying contacts in the Private Directory. This information is optional.

<table>
<thead>
<tr>
<th>Miscellaneous</th>
<th>WBE</th>
<th>DBE</th>
<th>Prequalified</th>
</tr>
</thead>
<tbody>
<tr>
<td>MBE</td>
<td>Tax Exempt</td>
<td>Prevailing Wage</td>
<td></td>
</tr>
<tr>
<td>Tax Exempt</td>
<td>DBE</td>
<td>Licensing Agency #(s)</td>
<td></td>
</tr>
<tr>
<td>Internal Rating</td>
<td>Bonding</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Required fields: None

Construction Code Information
You must select one or more CSI codes to associate with every company in your private directory. If there are subdivisions, you will be able to select from them as well.

Required fields: At least one Construction Code

1. Click one or more Available Construction Codes
   
   NOTE: To select multiple codes, either hold down the Ctrl key as you click on each one for codes separately or hold the Shift key as you select the first and last selected Construction code when listed together.

2. Click the “>” button to associate the codes with the company. The “Assigned Construction Codes field will be populated with the list.

   NOTE: To remove a Construction Code code, select all codes to remove from this field and click the “<” button.

Notification Settings
There are two fields available when you create a new contact for notification defaults for that contact.
Required Fields: None

**Edit a Company**

Plan room owners with the manage directory permission can edit a company’s details in the private directory. When editing company details, you can change the contact information, Construction codes, and settings with no warning. However, to prevent mistaken removal of a primary contact, you will be warned and then asked to confirm this action prior to its taking effect. Removing a primary contact also removes the association between the Network user (primary contact) and the company in the private directory. This action will remove the hosted project from the My Invited Projects list of the primary contact that was removed.

Once the primary contact is removed, the owner must enter a new primary contact’s information. When the company is saved with the new contact information, a notification is sent by the system to the new primary contact. This notification invites the new contact to all of the company bid packages to which they have been invited, and for which the company’s bidding status is “bidding” or “pending.”

The new primary contact must log into the McGraw Hill Construction (MHC) Network and access at least one of the company's existing hosted project bid packages in the Bid Management Service (BMS) before the hosted project appears in their My Invited Projects list.

**To Edit a Company**

1. From the Plan Room tab, click the Private Directory tab.
2. From the [Private Directory](#) screen, Highlight the row of which company to edit.
3. Click the Edit button.
4. From the [Private Directory - Edit](#) screen, make the necessary modifications.
5. When you are finished, click the Save Contact button.
Copy a Company

Copying a company enables the plan room owner to create a new company in My Private Directory using information contained in the existing company.

Information that will be automatically copied:

1. Company details
2. Bid documents
3. Bid packages

Information that will not be copied:

1. Communications
2. Invitations
3. Primary Contact and email

NOTE: When copying a company, you will be prompted to create a new primary contact with a different email address before the copy process is completed, because two companies within a private directory cannot contain the same primary contact email address. [While companies in one plan room can share a fax number, you may modify the fax number as well.]

To Copy a Company

1. From the Plan Room tab, click the Private Directory tab.
2. From the Private Directory screen, highlight the row of which company to edit.
3. Click the Copy button.
4. From the Private Directory - Edit screen, make the necessary modifications.
5. When you are finished, click the Save Contact button.
NOTE: You cannot retain the same primary email address for the new company.

Delete a Company

Plan room owners with Manage Directory permissions can delete companies from My Private Directory regardless of whether they created them. The action of deleting the company does not actually remove the company from the project record. It removes them from the private directory and prevents them from being invited to bid on future bid packages.

NOTE: If a company is deleted from the private directory, the owner can then create a new company in that private directory with the same primary contact information as the deleted company. Contact information is not considered duplicated once a company is deleted from the private directory.

To Delete a Company

1. From the Plan Room tab, click the Private Directory tab.
2. From the Private Directory screen, Highlight the row of which company to edit.
3. Click the Delete button.
4. OK to confirm deletion when the confirmation message displays

Create a Group

Sorting companies into groups makes managing them easier. Plan room owners with Manage Directory permissions can categorize companies in a variety of ways, most often using CSI code or location.

When you create a group, it will show up in the private directory along with the individual companies in that directory (including those that comprise the group), listed alphabetically with the other listings.

Note: By default, all companies listed in your private directory will display in the Private Directory Listing filtering screen. You can then refine this list using filters. Companies not in
your private directory must be added to your private directory to be available for selection as group members.

There are two ways to select companies to group:

1. Select companies from My Private Directory to include in the group
2. Filter to select companies

NOTE: You will use this choice when you want to filter for specific criteria or you want to add to the list of companies you have already selected from My Private Directory.

**To Create a Group from My Private Directory**

1. Click on Plan Room tab, click Private Directory.
2. Create a Group by right-clicking the My Groups from the pop up menu, select Add New Group
3. Type in Group Name.
4. From the Private Directory list, highlight the companies you want to group.
5. Drag the highlighted companies into the Group Folder.

**Edit a Group**

Plan room owners with the manage directory permission can edit a group, adding and deleting companies from the group.

To Edit a Group

1. Click Private Directory tab.
2. From the Private Directory screen, highlight the group to edit.
3. Right click the group name, select Rename Group.
4. Make changes and click outside of text box to save changes
Delete a Group

Plan room owners with Manage Directory permissions can delete groups from My Private Directory regardless of whether they created them. The action of deleting the group does not actually remove the group from the project record. It does remove them from view in the private directory.

To Delete a Group

1. From the Plan Room tab, click Private Directory tab.
2. From the Private Directory screen, Right click on group to delete.
3. Click Remove Group from the pop-up menu.

Send Message to Bidders

Plan room owners can send a message to companies in their private directory. The owner has the following options:

1. Send the message to contacts with email only
2. Send the message to both email and fax-only company contacts
3. Send to the entire private directory
4. Send to selected company contacts
Note: By default, all companies listed in your private directory will display in the Private Directory Listing filtering screen. You can then refine this list using filters. Companies not in your private directory must be added to your private directory to be available for selection as group members.

Messages sent from the private directory will not be saved in PDM Bidding, but you can elect to copy yourself as an email recipient. If you are a recipient, a list of the other recipients to whom the message was sent will be listed in the body of the message you receive. The recipients selected from the private directory will not see the list of other recipients. The message will appear as if it were only sent to them.

Additional Charges

When sending messages to a fax, plan room owners will see a warning that there is a $0.10 charge per faxed page. You must accept these charges from a pop-up warning message that displays to continue, or use the option to return to the message form to change the setting to "Send email only."

There are three ways to select companies as message recipients:

1. Click the checkbox next to each company to include in My Private Directory screen and clicking the Message button
2. Select the All Companies in My Private Directory option in the Message form
3. Filter to select companies from the Message form by selecting the Selected Companies option

To Send a Message to All Companies

1. From the My Plan Room tab, click Private Directory tab.
2. From the Private Directory screen, click the Notify button.

Note: If you selected any companies in My Private Directory prior to clicking the Message button, those companies will automatically display as message recipients in the Message form.
3. In the **Notifications form**, select which notification you want to send.
   a. Correspondence
   b. Correspondence with Fax Cover Letter
   c. Bid Reminder
   d. Bid Reminder with Fax Cover Letter
   e. Project Closure Notice
   f. Project Closure Notice with Fax Cover Letter

4. Enter Required Fields
   a. Reply to Email Address
   b. Subject
   c. Message.

5. Click on Next to identify which recipients to send message to.

6. Click on Add to add recipients or if you are finished click Next. You can also remove recipients prior to sending by clicking the Remove button

7. Add file attachments, if necessary, when finished, click Send.
IMPORTANT: The default is to send the message only to email addresses. Sending faxes will cause you to incur a charge of $0.10 per faxed page. You will have to confirm that you accept these charges before the message is sent.

**Import Company Contacts**

Plan room owners can easily transfer a list of subcontractors into Private Directory using a comma separated value (CSV) file. A CSV file can be generated by, and exported from, most company contact management software programs (such as Microsoft Outlook).

Note: For details on how to export a CSV file from your contact management system, see the software’s help file.

When exporting the CSV file, you will be able to determine which fields to include. The program may reference this option as “field mapping.” During this step, you must select the fields for the CSV file that coordinate with the fields allowed in the Private Directory.

The Private Directory requires the following fields be included in the CSV file:

- **CompanyName**
  - The name of the company
- **FirstName**
  - The first name of the primary contact at the company
- **LastName**
  - The last name of the primary contact at the company
- **Email**
  - The email address for the primary contact (email or fax is required for each company)
- **Fax**
The fax number for the primary contact (email or fax is required for each company)

**CSI Codes**
The CSI Codes for the type of work done by the company

The Private Directory also allows the following optional fields:

**Address1**
The street address for the company

**Address2**
The suite number or additional address information for the company

**City**
The city in which the company is located

**State**
The state in which the company is located

**Zip**
The zip code for the company’s address

**Country**
The country in which the company is located

**JobTitle**
The job title of the company’s primary contact

**Phone**
The phone number at which the primary contact can be reached

**Ext**
The extension for the phone at which the primary contact can be reached

**OtherPhone**
A secondary phone number at which the company can be reached

When exported, the labels for the fields in the CSV file may not match those given above. In this case, you must change the field name in the CSV file to match the field names described above.

For example: The address field may be labeled “company address” in your contact management system and exported as such. In order for the import to work properly, you will have to edit the label in the CSV file and change it to “Address1” as given above. You will need to do this for each and every field you are importing.

The file to be imported can be saved in either .TXT or .CSV format.

Once the CSV file is prepared, you will need to log in to the McGraw-Hill Construction Network.

**To Import Company Contacts**

1. Click on the My Plan Room tab.
2. Click on the Private Directory tab.
3. From the Private Directory screen, click the Import button.
4. Click the Import button.
5. You will be shown a preview of the contacts being imported.
   
   Note: Any mistakes will be shown in red. You must correct the errors before the import will succeed.

6. Review the information to ensure correctness.
7. Click the Save button to finalize the import.

**Print Company Contacts**

Plan room owners with Manage Directory permission can print a list of company contacts from their Private Directory. Company contacts listed in the Bidders not in your directory section will not print on the report, but can be printed through your browser's print function.

Plan room owners without permission can use their browser's print function to print the web page containing the contact information.

Though there may be multiple pages of company contacts, all contacts will be listed on one printout.

**To Print Company Contacts**

1. From the My Plan Room tab, click Private Directory.
2. From the Private Directory screen, click the Print button.
How to Access the plan room

My plan room, PDM Bidding, is a secure segment of the McGraw Hill Construction Network (MHC) that allows general contractors (called plan room owners in PDM Bidding) to do the following:

1. Host projects
2. Distribute project information and bid documents to potential bidders
3. Manage a private directory of subcontractor companies and contacts
4. Communicate with bidders
5. Facilitate the bidding process
6. Run reports across projects.

Subcontractors (called bidders in PDM Bidding) use the My plan room feature to access projects to which they have been invited, bid on projects, and communicate with plan room owners.

Each plan room is associated directly with one bid management license, but can be the home of multiple plan room owners. It is the plan room owner’s space and cannot be accessed by anyone except the license-holders without permission. Bidders (including the MHC Network editorial staff) must be invited, and when invited are only allowed very limited access to specific project and bid information for the bid packages to which they are invited.

PDM Bidding will authenticate a user with every attempt to access the plan room or any project therein. You can enter the plan room through a number of actions. These include a hyperlink in an email, a browser bookmark, typing the URL into a browser, or clicking on hyperlinks in the MHC Network. No matter how you access the system, the log-in process is the same.

To access the plan room and hosted projects from MHC, select any of the following methods:

1. Select the Plan room tab from the main MHC Network menu
2. Select My Hosted or My Invited projects from the Network main menu
3. Click the Host button when viewing a Dodge Report in the MHC Network

NOTE: Bidders will only be allowed into the plan room if the requested hosted project is active.

Below is a screen shot of the MHC Network menu containing the Plan room tab to access PDM Bidding.

The following people are allowed into the plan room:

- The plan room owner of the hosted project.
- A bidder in the requested project (only allowed when the hosted project is in the active state)
  - Only bidders given permission by being invited to a public or private project, or by accessing a public project are allowed in the plan room.
An MHC editorial staff member, when the requested project has been shared with the Network and the project is in the active state.

When you enter the plan room, if you are a plan room owner, your hosted projects will display under the Plan Room tab. From there, you will be able to perform all tasks relating to the bidding process for which you have permission.

Note: Whether the Plan Room tab displays is determined by whether the user has a PDM Bidding license.

If you are invited to hosted projects, the Invited tab will display with a list of all invited projects, or projects in which you respond "Yes" to bidding.

If you are an MHC Network user and have no projects in PDM Bidding, when you click the Plan Room tab, you will see information on how to become a plan room owner and host projects. The Invited tab will display the list of projects on which you are currently bidding.

**Add a New Hosted Project within PDM Bidding**

PDM Bidding allows plan room owners to store project details, bid details, and bid documents online in a secure environment. Hosted projects in PDM Bidding allow plan room owners to facilitate the bidding process, provide an interface for communication with bidders, enable online access to bid documents as well as other information about the bid for prospective and invited bidders. Hosted projects can exist in one of four different phases: setup, active, inactive, and archive. PDM Bidding plan room license dictates the total number of projects allowed.

You can add a project manually to PDM Bidding or transfer a project from the McGraw Hill Construction Network (MHC). The default setting when adding a new hosted project is private, which means that only invited bidders will have access to the project. Any bidder who has not been invited to a private project must request access from the plan room owner.

**Manually Add a Hosted Project to PDM Bidding**

1. From the Main Menu, click the Plan Room tab.
2. From the **My Projects** screen Load projects field, select New Hosted Project.
3. Click the Go button.
4. Follow the prompts on the **Add New Hosted Project** screen to create the new hosted project in PDM Bidding. An asterisk (*) displays next to required fields.
5. When you are finished entering your hosted project information, click the Save button.
Field Explanations

Below is further explanation of fields on the form:

**Project name**

The name associated with the project. This name will appear for each list of projects in PDM Bidding

**Project Key (read only)**

This number displays on the top right of the Add New Hosted Project screen when you create a new project. It is automatically assigned by PDM Bidding and is the unique key by which PDM Bidding identifies the project. It is not editable.

NOTE: This is the key used by bidders and prospective bidders to search for projects within PDM Bidding through the Find Hosted Project field on their View Projects screen.

This is not the same number as the one you type in the Associated with Dodge Report # field in the Project Setting field, which is the number of a project in the MHC Network. If a number is entered into this field and the checkbox is checked, you can search within the MHC Network for the PDM Bidding hosted project.

Note: The Associated Dodge Report # field will be pre-filled during a transfer.

**Project Contact**

You can select one of the plan room owners in the plan room from the drop-down list as the primary project contact.
**Project Type**

This is an optional field that enables you to select a specific type of hosted project.
Examples of hosted project types are 20100 – Commercial, 20101 – Office, and 20102 – Bank

**GC/CM**

This field is pre-populated with the company name from PDM Bidding contract.

**Project Value Range**

Use this field to enter the approximate cost of the hosted project.

**Preferred Service Provider**

Describe services recommended by the plan room owner with contact information and associated benefits of working with those companies, such as discounts.

**Project Settings**

**Project Phase radio buttons**

A hosted project can be created in one of three phases

NOTE: An additional phase called archive is available once the project is created. This phase is only available to plan room owners who have purchased archive space as part of their bid management license. Archived projects are closed and removed from the plan room owner’s view, available only from the archive administration area. This option is not available in the Project Settings when you create a new project.

**Setup Phase**

The setup phase is intended for hosted project setup, bid package setup, and bid planning.

**Active Phase**

Hosted projects in the active phase have full bidding and communication functionality enabled.

**Inactive Phase**

The inactive phase is intended for hosted projects that are on hold, projects in the bid review stage, or closed projects that have awarded all bids.

**Share Projects with MHC Dodge**

Checking the Share Projects with MHC Dodge checkbox invites the MHC Network Dodge editorial staff to view the project, obtain the bid documents, and list the project publicly on the Network, which is available to Network subscribers. When selected, Allow Uninvited Bidders is then selected by default, making the project a public hosted project available to all bidders. This setting can be overridden, but doing so is
not recommended since sharing with MHC Dodge lists the project publicly on the MHC Network and would result in many requests for access to the hosted project.

The default, when setting up a new project, is to create a private project, and the Share Projects with MHC Dodge checkbox will be unchecked. Public projects allow entry by any uninvited bidder who can access PDM Bidding. In addition, if checked, the Allow Uninvited Bidders checkbox will automatically be checked as well.

For more details on public and private projects, see the Public Vs. Private Hosted Projects topic.

Allow Uninvited Bidders

Checking the Allow Uninvited Bidders checkbox changes the project from a private to a public project, enabling bidding by any company who has access to PDM Bidding system, including those who have not been invited to bid. The default project type is private (unchecked).

Regarding prequalification: Bid packages associated with public projects may still require prequalification. In this case, although the hosted project is technically open to all bidders, bidders are not granted access to the hosted project's bid package until they have been prequalified by the plan room owner. This setting can be overridden, but this is not recommended as the project will be listed publicly on the MHC Network.

NOTE: If Share Projects with MHC Dodge is checked, the Allow uninvited Bidders field will automatically be checked as well.

Associated with Network Report #

Typing an MHC/Dodge Report number in this field provides the plan room owners with a number for future reference (so that the owner can check the MHC Network project for updated bid documents and project information).

This number is automatically filled in when a plan room owner transfers a project from the network (using the transfer project feature), or can be input by the plan room owner when creating a new hosted project in order to remember which MHC Network Project/Dodge Report is associated with the plan room owner's PDM Bidding project.

This is not the same number as the one assigned by PDM Bidding when you create a project. That number displays on the top right of the Add New Hosted Project screen when you create a new project. It is automatically assigned by PDM Bidding and is the unique key by which PDM Bidding identifies the project. It is not editable.

NOTE: PDM Bidding assigned number is the key used by bidders and prospective bidders to search for projects within PDM Bidding through the Find a Hosted Project field located on nearly all BMS screens.
Transfer an Existing Network Project

Instead of setting up a hosted project from scratch in PDM Bidding you can transfer the project from the McGraw Hill Construction Network (MHC). A project from the MHC Network can be hosted in PDM Bidding by multiple contractors as each contractor will have a separate plan room to host the project.

You can transfer:

1. The whole project, including descriptions, and all files (plans, specs, addenda, and any others)
2. Individual files by selecting each one from the plans, specs, addenda pages on the network

Project details, plans, specs, and addenda will be transferred into their respective categories in PDM Bidding. You can also specify only certain information to transfer. The newly transferred project will have the same name in PDM Bidding as the project in the MHC Network.

Transferring into an Existing Hosted Project

In addition to creating a new hosted project during transfer, you can transfer the plans, specs, and addenda of an MHC project into an existing hosted project in PDM Bidding. In that case, the MHC Network project details will not be transferred (since project details were written when the hosted project was created).

When you complete the process to transfer, all files are queued for transfer. Depending on the amount of other files waiting to be transferred, it can take a few minutes up to a few hours for the transfer to complete.

From here, you can elect to transfer the whole project or select individual files from the Network project to transfer to your new or existing BMS hosted project.

To Transfer the Entire Network Project

1. Locate the project you want to transfer in the Network.
2. Click the Host button.
3. A Dialog box appears with the following options.
To Transfer Individual Files from the Network Project

Locate the project you want to transfer in the Network.

From the Project Summary screen, click the Plans, Specs, and/or Addenda link for the list of files of this type to transfer.

Note: If there are subcategories of files within a category, you can click a checkbox to select all files within that subcategory only, or click the Select All checkbox to choose all files for that category (e.g., all Plans documents).
Note: To switch types of files from this screen, click the Plans, Specs, or Addenda button to display files in those categories.

1. Click the checkbox next to each file to select.
2. When finished, click the Host button.
3. From the Existing Hosted project drop-down menu, select the hosted project to which to transfer the files.

4. Click the Transfer button to proceed with the transfer process.

**Edit a Hosted Project’s Details**

Plan room owners with appropriate permission may edit a hosted project’s details. Bidders may not edit projects. The Edit Project Details screen displays exactly as does the Add a New Hosted Project screen, with a few restrictions:

**Sharing a hosted project with the Network**

1. If a hosted project was originally set as public by clicking the Share Project with MHC Dodge checkbox, once anyone from the McGraw Hill Construction Network (MHC) editorial staff receives the invitation, the project cannot be changed to private.
2. If the new project was originally set to the default of private, plan room owners with permission can click the Share Project with MHC Dodge checkbox to make the project public.

To Edit a Hosted Project's Details

1. From the Main Menu, click the My Plan Room tab.
2. From the My Projects screen Load projects field, select the project to edit.
3. Click the Edit button.
4. Modify the information in the Edit Project Details screen. For further details on editing project details, see the topic Explanation of Edit Project Details Fields.
5. When finished, click the Save button.

Explanation of Add/Edit Project Details Fields

Below is an explanation of fields on the Add (or Edit) Project Details screens. These details will display for plan room owners and hosted project bidders.

Field Explanations

Below is further explanation of fields on the form:

Project name

The name associated with the project. This name will appear for each list of projects in PDM Bidding

Project Key (read only)

This number displays on the top right of the Add New Hosted Project screen when you create a new project. It is automatically assigned by PDM Bidding and is the unique key by which PDM Bidding identifies the project. It is not editable.

NOTE: This is the key used by bidders and prospective bidders to search for projects within PDM Bidding through the Find Hosted Project field on their View Projects screen.
This is not the same number as the one you type in the Associated with Dodge Report # field in the Project Setting field, which is the number of a project in the MHC Network. If a number is entered into this field and the checkbox is checked, you can search within the MHC Network for the PDM Bidding hosted project.

Note: The Associated Dodge Report # field will be pre-filled during a transfer.

**Project Contact**

You can select one of the plan room owners in the plan room from the drop-down list as the primary project contact.

**Project Type**

This is an optional field that enables you to select a specific type of hosted project.

Examples of hosted project types are 20100 – Commercial, 20101 – Office, and 20102 – Bank

**GC/CM**

This field is pre-populated with the company name from PDM Bidding contract.

**Project Value Range**

Use this field to enter the approximate cost of the hosted project.

**Preferred Service Provider**

Describe services recommended by the plan room owner with contact information and associated benefits of working with those companies, such as discounts.

**Project Settings**

**Project Phase radio buttons**

A hosted project can be created in one of three phases

NOTE: An additional phase called archive is available once the project is created. This phase is only available to plan room owners who have purchased archive space as part of their bid management license. Archived projects are closed and removed from the plan room owner’s view, available only from the archive administration area. This option is not available in the Project Settings when you create a new project.

**Setup Phase**

The setup phase is intended for hosted project setup, bid package setup, and bid planning.

**Active Phase**

Hosted projects in the active phase have full bidding and communication functionality enabled.
Inactive Phase

The inactive phase is intended for hosted projects that are on hold, projects in the bid review stage, or closed projects that have awarded all bids.

Share Projects with MHC Dodge

Checking the Share Projects with MHC Dodge checkbox invites the MHC Network Dodge editorial staff to view the project, obtain the bid documents, and list the project publicly on the Network, which is available to Network subscribers. When selected, Allow Uninvited Bidders is then selected by default, making the project a public hosted project available to all bidders. This setting can be overridden, but doing so is not recommended since sharing with MHC Dodge lists the project publicly on the MHC Network and would result in many requests for access to the hosted project.

The default, when setting up a new project, is to create a private project, and the Share Projects with MHC Dodge checkbox will be unchecked. Public projects allow entry by any uninvited bidder who can access PDM Bidding. In addition, if checked, the Allow Uninvited Bidders checkbox will automatically be checked as well.

For more details on public and private projects, see the Public Vs. Private Hosted Projects topic.

Allow Uninvited Bidders

Checking the Allow Uninvited Bidders checkbox changes the project from a private to a public project, enabling bidding by any company who has access to PDM Bidding system, including those who have not been invited to bid. The default project type is private (unchecked).

Regarding prequalification: Bid packages associated with public projects may still require prequalification. In this case, although the hosted project is technically open to all bidders, bidders are not granted access to the hosted project's bid package until they have been prequalified by the plan room owner. This setting can be overridden, but this is not recommended as the project will be listed publicly on the MHC Network.

NOTE: If Share Projects with MHC Dodge is checked, the Allow uninvited Bidders field will automatically be checked as well.

Associated with Network Report #

Typing an MHC/Dodge Report number in this field provides the plan room owners with a number for future reference (so that the owner can check the MHC Network project for updated bid documents and project information).

This number is automatically filled in when a plan room owner transfers a project from the network (using the transfer project feature), or can be input by the plan room
owner when creating a new hosted project in order to remember which MHC Network Project/Dodge Report is associated with the plan room owner’s PDM Bidding project.

This is not the same number as the one assigned by PDM Bidding when you create a project. That number displays on the top right of the Add New Hosted Project screen when you create a new project. It is automatically assigned by PDM Bidding and is the unique key by which PDM Bidding identifies the project. It is not editable.

NOTE: PDM Bidding assigned number is the key used by bidders and prospective bidders to search for projects within PDM Bidding through the Find a Hosted Project field located on nearly all BMS screens.

**View & Print a Hosted Project’s Details**

From the Manage Project Details screen, plan room owners view and print hosted project details.

The Manage Project Details screen displays the following:

1. Project name
2. CSI codes assigned to the project
3. Number of bid documents in the project
4. Number of participants invited to bid on the project
5. Number of qualified invitees
6. Number of invitation responses received for the project
7. Project bid date

**To Access Project Details**

1. From the main menu, click My Plan Room.
2. In the Load projects field, click the down arrow and select a project.
3. Click the Go button.
4. From the Manage Project Details screen, click the Print button to print all project details.

**Copy a Hosted Project**

Plan room owners with permission have the ability to copy an existing hosted project. This allows you to maintain a template project to use as the basis for new hosted projects. The template could contain, for example, prequalification requirements instructions, other documents common to all of the owner’s hosted projects, and a standard set of bid packages.

During the copy process, the user must confirm that they want to copy the hosted project, and will then initiate the creation of a new project using the initial hosted project's details. Associated bid documents and bid packages will also be transferred into the newly created hosted project.

A copied hosted project has the following attributes:

- Bid documents will retain their categorization (as plans, specs, addenda, or other)
PDM Bidding User Guide

- Bid documents will retain their association with bid packages
- No association with bidders, invited bidders, status, invitations, or any type of communication will be retained in the newly added hosted project.

To Copy a Hosted Project

1. From the My Projects screen, highlight the row to copy.
2. Click the Copy button.

During the copy process, the PDM Bidding license is checked to ensure another hosted project is allowed.

Some information, such as bid documents, may be quite large. In that case, or if there are a number of other documents waiting, they will be queued for copy and a message will display alerting the user of the delay.

NOTE: Even though this is going to be a new hosted project, the existing information is displayed in the Edit Project Details screen, so you can modify the information. The word "Copy" is appended to the name of the new hosted project.

Delete a Hosted Project

Plan room owners with permission may delete any existing hosted project in PDM Bidding

To Delete a Hosted Project

1. From the main menu, click the My Plan Room tab.
2. From the My Projects screen, highlight the row to one or multiple hosted projects to delete.
3. Click the Delete button. The hosted project is removed from the plan.
Archive a Hosted Project

Administrative plan room owners may archive hosted projects if archive space has been purchased on their PDM Bidding license, and if there is enough remaining space to accommodate the project to be archived.

To Archive a Hosted Project from My plan room:

1. From the Main Menu, click the My Plan Room tab.
2. From the My Projects screen, highlight the row next to the project to be archived.
3. Click the Archive button.

To Delete Archived Projects:

NOTE: Once deleted, hosted projects are not recoverable.

1. From the Main Menu, click the My Plan Room tab.
2. Select Administration from the My Plan Room Links menu.
3. Click the Archive tab in the Manage Administration screen.
4. Highlight the row for each project to delete.
5. Click the Delete button to remove the archived project.

Note: This will permanently remove the project from the BMS.

To Restore Projects
The administrative owner can only restore an archived project if there is available space on the BMS license for an additional hosted project. If no space is available, the administrative room owner has to either delete a project to make room for the restoration, or purchase additional project space.

1. From the Main Menu, click the My Plan Room tab.  
2. Select Administration from the My Plan Room Links menu.  
3. Click the Archive tab in the Manage Administration screen.  
4. Highlight the row next to each archived project to restore.  
5. Click the Restore button. The hosted project will again be available in the plan room, but it will still be an Inactive project until you change the settings in the Edit Project Details screen.

**Manage Hosted Project Activities**

Once a hosted project is set up, bid packages are added, and bidders invited, plan room owners will use the Manage Project area of the PDM Bidding to coordinate the activities associated with the bidding process.

The Manage Product area of a project is shared among all of the plan room owners.

- Plan room owners do not have an individual Project Inbox, Sent Items, and Bidder Status feature. All plan room owners share management responsibilities for the hosted project and therefore, share the project Inbox, Sent Items, and Bidder Status area.

- Bidders do have an individual Project Inbox, Sent Items, and Bidder Status area within each of their invited projects.

**NOTE:** The Bidders’ view of the BMS is different. They are able to view the following areas:

- Hosted project details
- Project status
- Bid packages
Bidders are also able to download and order bid documents.

To Manage Projects

1. From the main menu, click My Plan Room.
2. In the Load projects field, click the down arrow and select a project.
3. Click the Go button. Depending on the status of the project, you will be taken to one of the following screens:
   - If an Active project, the Manage Status screen (the Inbox) displays.
   - If an Inactive project (either one that is in the Setup phase or for which development has ceased), the Manage Project Details screen, which defaults to Details, for the selected project displays.

From this screen, with appropriate permissions, you can access:

Details
- Edit (project details, including change of status)
- Print (project details)
- Notify (alert bidders to updates and addenda)

Status
- Inbox
- Sent Items
- Bidders
- Notify

Bid Documents (Tabs for Plans, Specs, Addenda, or Other)
- Order
- Add Bid Packages
- Upload (files, etc., to the project)
- Download (files, etc., to your computer)
- Scan (files, etc.)
- Delete (files, etc., from the project)

Bid Packages
- Order
- Invite
- Notify
- Add Bid Pkgs
- Add Bid Docs
- Edit (bid packages)
- Award (bid packages)
- Delete (bid packages)
Details View

The Details view is the default when you access the Manage Projects Details screen. From here, with permissions, plan room owners can edit project details, print project details, and utilize the Notify feature to alert bidders to updates and addenda to bid packages.

Status View

When you click the Status button on the Manage Project Details screen, your Inbox displays. From there, you can also access your Sent Items and Bidders areas. From here, you can also utilize the Notify feature to alert bidders to updates and addenda to bid packages.

Bid Documents View

When you click the Project Documents button on the Manage Project Details screen, with permission, you can upload documents to a hosted project, attach them to bid packages, and perform other activities with the documents (e.g., order hard copies, download, detach. Bid documents can be clustered into bid packages for ease of bidding.

NOTE: Only plan room owners can access the main bid documents area. Bidders can only view and download bid documents associated with bid packages available to them.

There are four document categories within a bid package:

1. Plans
2. Specs
3. Addenda
4. Other (those not falling into one of the above three categories)
Bid documents are first uploaded to a hosted project and then attached to bid packages. When you access the Manage Bid Documents screen from a project, you will see a categorized list of all documents uploaded to the project.

NOTE: A bid package is an entity within a project that includes details about bidding, a list of CSI codes associated with the bid, prequalification settings, and all bid documents necessary for a subcontractor to submit a bid.

From the Manage Bid Documents screen, you can:

1. Order bid documents
2. Add bid documents to bid packages
3. Upload bid documents
4. Download bid documents to your computer
5. Scan documents into your plan room
6. Delete bid documents from the project

For further details about bid documents and bid packages, see the following topics:

1. Bid Documents Overview
2. Bid Package Overview

**Bid Package View**

You can manage bid packages when you click the Bid Package button on the Manage Project Details screen, with appropriate permission.

From this screen, you can:

1. Order bid documents
2. Invite bidders to bid on this bid package
3. Notify bidders of updates and changes to the hosted project and bid package
4. Add bid packages to the hosted project
5. Add bid documents to the bid package
6. Edit (bid packages)
7. Award (bid packages)
8. Delete (bid packages)

**Bidding Overview**

The main goal of PDM Bidding is to assist general contractors in managing the bidding process of a hosted project. Every project in PDM Bidding can contain one or more bid packages. A bid package is an entity within a project that includes details about bidding, a list of CSI codes associated with the bid, prequalification requirements, and all bid documents necessary for a subcontractor to submit a bid.
PDM Bidding enables general contractors to automate the following bidding processes:

1. Inviting and awarding bid packages to sub-contractors (called bidders)
2. Managing communications for activities such as updating bidder status and notices requesting information for prequalification.
3. Editing, adding, and deleting documents associated with the bid
4. Ordering hard-copies of documents
5. Editing bid package and overall project details
6. Determining prequalification for a bid package
7. Managing company and contact information within the project

Projects available for bidding must be in the Active phase. Once a bid has been awarded, the project is normally changed to inactive. When inactive, all new prospective bidders, as well as those who participate in the bidding process will no longer have access to the project.

**Bid Package Overview**

The main goal of PDM Bidding is to assist general contractors in managing the bidding process. Every project in PDM Bidding can contain one or more bid packages. A bid package is an entity within a project that includes details about bidding, a list of CSI codes associated with the bid, prequalification settings, and all bid documents necessary for a subcontractor to submit a bid.

The general contractor, or plan room owner, decides whether to have one big bid package or to create separate bid packages assembled by trade, on which subcontractors, or bidders, will bid individually according to their trade association.

There are two steps to creating a bid package:

1. Defining the bid package
2. Attaching bid documents to the bid package

Once these steps are accomplished, invitations can be issued to subcontractors requesting them to bid. Plan room owners with permission can create bid packages, edit bid package details, add and remove documents from the package, and notify bidders of changes to the package.

**Define & Add a Bid Package**

Bid packages must be defined and saved in PDM Bidding before adding documents and inviting bidders. The required information for creating a bid package is:

1. Giving the package a name and description
2. Specifying the response and bid dates/times
3. Assigning the appropriate CSI codes
4. Determining whether prequalification is required

NOTE: The plan room owner must save the package definition before it is officially added to the project.
To Define and Add a Bid Package

1. From the main menu, click My Plan Room.
2. From most screens in the BMS, you can access the Manage Bid Packages screen, from which you can add a bid package. For example:

From My Projects

1. From the My Projects screen, click the hyperlink name of the project.
2. Depending on the status of the project, either the Manage Project Details or Manage Status screen (where the Inbox is located) will display. From there, click the Bid Packages button to access the Manage Bid Documents screen.

OR

1. From the My Projects screen, select a project from the Load Projects drop-down and click Go.
2. Depending on the status of the project, either the Manage Project Details or Manage Status screen (where the Inbox is located) will display. From there, click the Bid Packages button to access the Manage Bid Documents screen.

Note: The Bid Packages button also displays on other screens, such as the Bid Documents screen.

Define a Bid Package

From the Manage Bid Packages screen, click the Add Bid Pkg button.

Enter the required information on the Add Bid Package screen.

NOTE: Required fields display with an * to the left of them.

When finished, click the Save button to save this bid package in the project.

Field Explanations

Below is further explanation of the fields on the Add Bid Package screen:

Bid Package Information
Required Fields

**Bid Package Name**
Type a unique name for the bid package. You cannot name two bid packages within one project with the same name.

**Bid Package Description**
You must type a description of the bid package for listing in the project. **Note: There is a 255 character limit on the description.**

**Bid Date**
This is the date by which bidders must submit their bids.

**Bid Time**
The plan room owner can specify a time by which invited bidders must deliver their bid.

Optional Fields

**Response Date & Response Time**
These fields enable the plan room owner to specify a time and date by which prospective bidders must respond to an Invitation to Bid.

**Bid Time Zone**
Plan room owners can select the time zone for the response and bid times and dates.

**Require Prequalification**
If clicked, system will automatically match sub contractors meeting prequalification criteria to the bid package.

**Construction Information**
From the Construction Codes Tab, you must select one or more Construction codes to associate with this bid package.

1. Click one or more construction codes

   NOTE: To select multiple codes, either hold down the Ctrl key as you click on each one for codes separately or hold the Shift key as you
select the first and last selected Construction code when listed together.

2. Click the > button to associate the codes with the bid package. The Selected Construction Codes field will be populated with the list.

   NOTE: To remove a Construction code, select all codes to remove from the *Selected Construction Codes field and click the Remove button.

Edit Bid Package Details

Once created, bid packages can be edited by plan room owners by plan room owners with the manage bid packages permission. Notification of any change to a bid package can automatically be sent to bidders, however, bidders with their status set to not bidding will not receive the notification.

To Edit a Bid Package

1. From the Manage Bid Packages screen, highlight the row next to the bid package to edit.

2. Click the Edit button.

3. Modify the Edit Bid Package form as needed. For details on fields in this form, see Define & Add a Bid Package.
NOTE: There is an additional field on the Edit Bid Package form to enable automatic notification of all bidders when there are changes to the bid package in the Edit Bid Package form. To enable automatic notification, click the checkbox next to Notify project bidders of any changes made on this form field, which is located on the bottom of the Edit Bid Package screen.

Delete Bid Packages

Plan room owners with the manage bid package permission can delete bid packages from a hosted project. When deleted, the bid package no longer displays in the hosted project.

Note: Once deleted, bid package will be removed from the hosted project.

Upon deletion, bidders are automatically sent a notification alerting them of the removal of the project bid package.

To Delete a Bid Package

1. From the main menu, click My Plan Room.
2. From the My Projects screen, select a project from the Load Projects drop-down menu.
3. Click the Go button.
4. From the Manage Project Details screen, click the Bid Packages button.
5. From the Manage Bid Packages screen, highlight the row next to the bid package to delete.
6. Click the Delete button.

Prequalification Overview

In PDM Bidding, when plan room owners define a bid package for a project, they determine whether bidders require prequalification. Prequalification is the process used by general contractors to certify that a bidder (subcontractor) possesses the appropriate qualifications to perform the work required on the project.

There are four possible scenarios that involve prequalification determination in PDM Bidding:

1. Private projects with bid packages that do not require prequalification
2. Public projects with bid packages that do not require prequalification
3. Private projects with bid packages that require prequalification
4. Public projects with bid packages that require prequalification

A bidder can be prequalified for all projects when added to the plan room owner's private directory, by clicking the check-box in the Settings section when you add or edit a company in the private directory.

This setting can be overridden by the plan room owner within a specific bid package when ending an invitation to bid.

Private Projects & Prequalification

A private project in the PDM Bidding is a hosted project that is only available to invited bidders. Anyone not invited must request access from the plan room owner. The default when creating a new hosted project is private.

Companies who access a public project do not require an invitation, but must follow the same procedures as those who are invited to a private project by the plan room owner.

All hosted projects include bid packages. During bid package development, for both public and private projects, the plan room owner determines whether to require bidders to be prequalified before bidding.

Prequalification Required

If this option is selected when adding a bid package to a hosted project, the Prequalification Requirements form is attached to the Invitation to Bid letter and sent to all invited bidders. Bidders will download a file containing information on the bidding requirements and how to prepare their qualifications for submission. The Invitation to Bid letter includes instructions for submitting qualifications both online and via fax. Bidders who require prequalification will not be allowed to view or download bid packages until their qualifications are approved.

Note: Invited bidders can be pre-approved if they were already qualified during the Invitation to Bid process.

Prequalification Not Required

When a bid package does not require prequalification, all prequalification references in the bid package, Invitation to Bid, and bidder status areas are marked as N/A when
viewed by the plan room owner. Bidders will see no reference to prequalification at all. If no prequalification is required, bidders gain immediate access to the project and individual bid packages to which they are invited.

To Select or De-Select Prequalification from a Bid Package

Note: This section refers to the process when creating a bid package only.

1. From the main menu, click My Plan Room.
2. From the My Projects screen, select a project from the Load Projects drop-down menu.
3. Click the Go button.
4. From the Manage Project Details screen, click the Bid Packages button.
5. From the Manage Bid Packages screen click the Add Bid Pkgs button.
6. From the Add Bid Package screen, click the checkbox next to the Require prequalification field to de-select prequalification from the bid package. The default selection is to require prequalification.
7. Complete the Add Bid Package form. See the topic Add Bid Packages for a detailed explanation of this form.

Public Projects & Prequalification

A public hosted project is available in the bidder view to any member of the McGraw-Hill Construction Network (MHC). These hosted projects are normally shared with McGraw-Hill editorial staff and are available in the MHC Network as searchable Bid Management Service (BMS) projects.

Within all hosted projects are bid packages. During bid package development, the plan room owner determines whether to require bidders to be prequalified before bidding.

Prequalification Required

Bidders who enter a public project without an invitation (by searching for MHC Network Projects) will be prompted to submit their qualifications when they try to
access a bid package. The prequalification requirements form is available to be downloaded from the prompting page. The Invitation to Bid letter includes instructions for submitting qualifications both online and via fax.

**Prequalification Not Required**

When a bid package does not require prequalification, all references in the bid package, Invitation to Bid, and bidder status areas are marked as N/A when viewed by the plan room owner. Bidders will see no reference to prequalification at all.

If no prequalification is required, all potential bidders gain immediate access to the project and individual bid packages to which they are invited.

**To Select or De-Select Prequalification from a Bid Package**

Note: This section refers to the process when creating a bid package only.

1. From the main menu, click My Plan Room.
2. From the My Projects screen, select a project from the Load Projects drop-down menu.
3. Click the Go button.
4. From the Manage Project Details screen, click the Bid Packages button.
5. From the Manage Bid Packages screen click the Add Bid Pkgs button.
6. From the Add Bid Package screen, click the checkbox next to the Require prequalification field to select prequalification from the bid package.

Note: You can optionally attach a prequalification form.

7. Complete the Add Bid Package form. See the topic Define and Add a Bid Package for a detailed explanation of this form.
Update Bidder Prequalification Status

When a bid package requires prequalification, plan room owners need to update the status of existing bidders on this bid package. Updates are entered on the Update Bidder Status screen. There are three available options for prequalification status:

1. Yes
2. No

If a bidder is invited with prequalification required or a bidder tries to access a public project where prequalification is required, the bidder's status is automatically set to pending until the plan room owner changes it.

If no prequalification is selected when defining the bid package, you cannot update the qualification status and all bidders are marked with a status of N/A.

To Update Qualification Status

1. From the My Projects screen, select a project Load Projects drop-down menu.
2. Click the Go button.
3. From the Manage Project Details screen, click the Status button.
4. From the Manage Status screen, click the Bidders tab to view Bidder Status.

NOTE: The bidder list is sorted by Bid Package.
5. Click the checkbox next to the bidder whose prequalification status you want to update.
6. Click the Update button to display the Update Bidder Status screen.
7. From the Update Bidder Status screen, in the Qualification section, choose option from dropdown menu for appropriate status.

If no prequalification is required, all potential bidders gain immediate access and their qualification status is set to N/A.

8. Click the Save button when finished to complete the update.

NOTE: Bidders whose Qualification Status has been updated will automatically be notified of the change. Bidders will not be notified of any other status update (i.e., Response Status, Bid Submitted).

**Change in Prequalification Requirement**

Once a bid package is created, requirements for prequalification can be changed by a plan room owner with appropriate permission.
• If the bid package's setting is changed from prequalification required to no prequalification, then all bidder's prequalification status is changed to match the setting in the company profile (Private Directory).

• If the setting is changed from no prequalification to prequalification required, then the bidder's status is changed to whatever is specified in the company profile.
  
  o If the bidder is listed as prequalified in the Private Directory, then they are automatically prequalified for all bid packages for this project.

  NOTE: Plan room owners with permission can override a bidder's prequalification status on any individual bid package, but if the setting is changed after the invitation is sent, you must update the status for each bidder individually in the Bidders tab of the project Inbox.

  o If the bidder is not listed as prequalified in the company profile, then their status is changed to Pending and they must submit qualifications before being allowed access to the project. In this case, bidders marked as pending will be prompted to submit their qualifications when they next try to access the project bid packages.

Prequalification Required

If this option is selected when adding a bid package to a hosted project, the Invitation to Bid letter contains a link to the Send Prequalification Information form, and sent to all invited bidders. Bidders will download a file containing information on the bidding requirements and how to prepare their qualifications for submission.

The Invitation to Bid letter includes instructions for submitting qualifications both online and via fax.
Prequalification Not Required

When a bid package does not require prequalification, all prequalification references and documents in the bid package, Invitation to Bid, and bidder status areas are marked as N/A when viewed by the plan room owner. Bidders will see no reference to prequalification at all.

To Select or De-Select Prequalification from a Bid Package

1. From the main menu, click My Plan Room.
2. From the My Projects screen, select a project from the Load Projects drop-down menu.
3. Click the Go button.
4. From the Manage Project Details screen, click the Bid Packages button.
5. From the Manage Bid Packages screen highlight the row next to the bid package to update.
6. Click the Edit button.
7. Click to check or un-check Requires prequalification checkbox to change the prequalification requirements for this bid package.

NOTE: If prequalification is required, you can browse to a file on your hard drive and attach the Prequalification Requirements form.

Complete any other necessary changes to the Edit Bid Package form. See the topic Edit Bid Package Details for more information.

Bid Documents Overview

Plan room owners with permission will add bid documents to bid packages. This process is accomplished in two steps. First, you upload or transfer files into the project. Then, you associate them with specific bid packages.

Plan room owners upload documents to PDM Bidding project in any of three ways:

1. Uploading files directly
2. Transferring existing files from a Network project
3. Sending hard copies of the documents to ReproMAX to be scanned and added to the plan room

NOTE: Once documents are in the hosted project, plan room owners and bidders will be able to view, download, and order hard copy versions of the documents.

NOTE: Plan room owners need manage bid documents permission to upload documents, and manage bid packages permission to associate bid documents with bid packages.

To Transfer a File from the Network

When viewing a project in the McGraw Hill Construction Network (MHC), plan room owners may select all or a subset of files (plans, specs, and/or addenda) from the Network project to be transferred into one of the hosted projects in their Plan room. For more details on this process, see the Transfer an Existing Network Project topic.

To Scan from Hard Copies

Plan room owners may send hard copy plans, specs, and addenda to Xerox to be scanned and submitted into their plan room. The BMS will generate a Xerox Closed Loop Communication (CLC) transmittal cover sheet that the owner will mail to Xerox along with the hard copy documents. Xerox will digitize the documents and queue the files to be added to the BMS project indicated on the CLC transmittal cover sheet.

Upload Bid Documents

PDM Bidding provides an easy method to link bid documents with a bid package, allowing bidders easy access and download capabilities. This is accomplished by first uploading the files to the project and then associating them with one or more bid packages. Most file types are supported by PDM Bidding. The supported file types include:

1. Microsoft Office documents
2. WordPerfect Office documents
3. Text files
4. TIFF, PLN
5. AutoCAD documents
6. PLT files

NOTE: All unsupported file types are listed below in the Unsupported File Types section.

When files are uploaded, they will be converted into PDF format. Before conversion to PDF, documents can be downloaded and hard copies can be ordered. Once converted, files can also be viewed online as a PDF. AutoCAD files can be viewed using the OnCenter viewer.
There may be a wait of up to 24 hours if there are other documents queued for upload. Once converted, the document can be viewed, downloaded, and hard copies ordered.

There are two methods in the BMS for uploading documents:

- The default upload method is for a single upload, which allows plan room owners to browse their hard drive to select one file to upload.
- The multiple files can be dragged and dropped into PDM Bidding from the plan room owner's hard drive.

The multi-file upload tool supports file compression prior to transmission, reducing transfer time. The documents will be uncompressed by the server when the transfer is complete.

Files can only be uploaded into one bid document category at a time. For example, if the owner has both plans documents and specs, they will need to be uploaded separately, as they fall into different categories.

If a document contains the same name as an existing file in the system, the newly uploaded file will automatically be appended with a 1, 2, 3, etc., and the user alerted.

All documents are scanned for viruses, using McGraw-Hill Construction (MHC) Network’s standard virus protection software prior to completion of upload.

To Upload a Bid Document to the Project

1. From the main menu, click the My Plan Room tab to view your hosted projects.
2. From the Load Projects drop-down list, select the project for which you want to upload documents.
3. Click the Go button.
4. From the Manage Project Details screen, click the Project Documents button.
5. From the Project Documents screen, click the tab containing the type of documents to upload.

Note: You can only upload files from one category at a time: plans, specs, addenda, or miscellaneous files that do not fit into one of these other categories. The default category tab displayed in the Manage Project Details screen is Plans.

6. From the Manage Bid Documents screen, click the Upload button.
Select Multiple Files

The Multi-File Upload tool enables you to select multiple files at one time from your computer. You can select one or more files in your Windows Explorer and drag them to the Upload screen.

Note: The single file upload is the default.

1. Click the Select Files button to navigate to the files on your computer.
2. Select one or more files to upload.

   NOTE: To remove files from the list, click on the hyperlink for the file to remove and click the Remove Files button.

3. Drag the files to the Projects Document screen.

Upload a Single File

The single file upload lets you specify through the PDM Bidding application which files you want to upload. It also lets you choose a Display name associated with that file.

1. From the Project Documents Screen, select folder to upload documents.
2. Note: You cannot drag and drop files when uploading a single file from this screen.
3. Click the Upload button to launch Single File upload screen.
IMPORTANT! Click the Close button only if you do not want to upload the file. You must click the Upload Now button to complete the process of uploading the file to your project.

**Unsupported File Types**

In order to reduce the risk of viruses, the BMS will not accept the following file types for upload:

<table>
<thead>
<tr>
<th>Executable &amp; Config Files</th>
<th>Script Files</th>
<th>Media Files</th>
</tr>
</thead>
</table>

**Scan Bid Documents**

Plan room owners may send hard copy plans, specs, and addenda to Xerox to be scanned and uploaded to their plan room. The BMS will generate a Xerox Closed Loop Communication (CLC) transmittal coversheet that the plan room owner will mail.
to Xerox. Xerox will digitize the document and queue the files to be added to the BMS project indicated on the CLC transmittal cover sheet.

**Associate Documents with a Bid Package**

Once documents have been uploaded into a Bid Management Services (BMS) hosted project, plan room owners with permission can associate the documents with specific bid packages. Once this is done, bidders can view, download, and order hard copies of the bid documents.

To Associate Documents with a Bid Package through the Manage Bid Packages Screen

1. From the main menu, click the My Plan Room tab to view your hosted projects.
2. From the Load Projects drop-down list, select the project that contains the bid package to which you want to add uploaded documents.
3. Click the Go button.
4. From the Manage Project Details screen, click the Project Documents tab.
5. Choose the bid package folder from the left navigation.
6. Add appropriate folders.
7. Upload files by choosing upload or drag files from your machine directly into the right display area.

**NOTE:** To remove a bid package from the list on the right, click to select the package to remove and click the Remove button.

8. Check the Notify all invited Bidders checkbox if you wish to send a notification to all bidders alerting them of the addition of the files.

**NOTE:** If Notify all invited Bidders is checked, an automated notification will be sent to all invited bidders.

9. Click the Save button to complete the process.
Once this process is complete, plan room owners and bidders will be able to access these files from the respective bid package.

**Remove Documents from a Bid Package**

Plan room owners can remove documents from a bid package if they are no longer needed.

Note: If a bid document is removed from a bid package through the Bid Packages screen, an automatic message is sent to all bidders with the status of Pending or Bidding to inform them that this document has been removed from the package. However, if the bid document is removed from the main Bid Documents screen, the plan room owner will have to manually notify those bidders.

**To Remove Documents from a Bid Package through the Manage Bid Packages Screen**

1. From the main menu, click the My Plan Room tab to view your hosted projects.
2. From the Load Projects drop-down list, select the project that contains the bid package to which you want to add uploaded documents.
3. Click the Go button.
4. From the Manage Project Details screen, click the Project Documents tab.
5. From the Bid Packages folder(s), click the folder containing the documents to remove.
6. Highlight the files to remove.
7. Click the Remove button to complete the process.
Download Bid Documents

Once bid documents have been added to a package, bidders may download one file at a time or multiple files at once. If downloading multiple files at one time, the files will be compressed into a self-extracting zip file by the system.

To Download Bid Documents
1. From the main menu, click the My Plan Room tab to view your hosted projects.
2. From the My Projects screen, select a project from the Load Projects drop-down menu.
3. Click the Go button.
4. From the Manage Project Details screen, click the Project Documents tab.

NOTE: if the project is in the Active status, the plan room owner will go to the Manage Status screen. The rest of the steps, as outlined below, are the same.

5. From the Manage Bid Documents screen click the checkbox next to the document(s) to download from the Plans, Specs, Addenda, or Other category.
6. Click the Download button.
7. Follow the prompts to download the documents.

Order Bid Documents

Hard copies of bid documents and files can be ordered through the PDM Bidding. When ordering, the information will be passed to the Network shopping cart for processing.
There are two ways to order bid documents:

- Order bid documents individually (e.g., specific plan or spec files)
- Order all bid documents associated with a bid package

To Order Bid Documents Individually

1. From the main menu, click the My Plan Room tab to view your hosted projects.
2. From the My Projects screen, select a project from the Load Projects drop-down menu.
3. Click the Go button.
4. From the Manage Project Details screen, click the Project Documents button.
5. From the Manage Bid Documents screen, click the checkbox next to each document to order from the Plans, Specs, Addenda, or Other category.
6. Click the Order button to fulfill your order in the Network shopping cart and follow instructions in the cart to complete your order.
7. From the Shopping Cart Checkout screen, you can either:
   a. Add recipients
   b. Edit Recipients Information (including delivery options)
c. Delete recipients from the list

8. Click the Next Button to enter Credit Card Information

9. After entering your billing and address information, click the Place Order button to finish the process.

To Order Bid Documents

All Bid Documents for a Bid Package

1. Follow steps 1-3 above.

2. From the Manage Project Details screen, click the Bid Packages button.

3. From the Manage Bid Packages screen, click the checkbox next to the bid package containing the documents you want to order.

4. Click the order button to display the Network shopping cart.

5. Follow steps 7-9 to complete your order.

Delete Bid Documents
Plan room owners with permission can delete bid documents from a hosted project. You will be asked to confirm the deletion prior to completion of the task. Once deleted, documents will not display in the project for owners or bidders.

**NOTE:** Once documents have been deleted from the project, they will no longer be associated with bid packages and all references to the documents will be removed. When deleting documents, plan room owners will be prompted to send an automated notification to bidders if these documents were associated with an existing bid package.

**To Delete Bid Documents**

1. From the main menu, click the My Plan Room tab to view your hosted projects.
2. From the My Projects screen, select a project from the Load Projects dropdown menu.
3. Click the Go button.
4. From the Manage Project Details screen, click the Bid Documents button.
5. From the Manage Bid Documents screen, click the checkbox next to the documents to delete.
6. Click the Delete button.
7. Confirm deletion when requested.

**How to Invite Bidders**

The Invitation to Bid is an automated form letter sent to prospective bidders in one of two ways to prospective bidders. Invitations to bid are initiated by plan room owners and sent to companies requesting them to bid on a bid package within a public or private project. Unlike public hosted projects in the Bid Management Service (BMS), for which anyone from the McGraw Hill Construction Network (MHC) can bid, private hosted projects require companies to be invited to bid by a plan room owner. However, plan room owners can opt to send invitations to bidders for public projects as well.

**MHC Network members are allowed access to all bid packages in public projects.** When invited to a private project, bidders only have access to the areas of the project related to the bid package to which they have been invited. Invitations can only be issued from individual bid packages and only sent to companies listed in the owner's private directory (uninvited bidders on a public project who do not exist in the Private Directory will display in the Bidders Not in My Private Directory section). While a company can be invited to multiple bid packages on one project, invitations can only be issued for one bid package at a time.
NOTE: If bidders need to be prequalified before bidding, the prequalification requirements form will be attached to the Invitation to Bid.
An attempt to access a private project by a company who hasn't been invited generates a message requiring the company to request access from the plan room owner and gives the company an opportunity to issue the request. Upon receipt of the request, the owner can grant access to the requester by sending the Invitation to Bid and adding the company to the private directory.
When invitations are sent, the invited bidders receive one of two types of invitations:
- **Prequalification required**—information and instructions included in the body of the message
- **No prequalification required**

NOTE: If prequalification is required, this type of invitation is sent when an invited bidder needs to be qualified before bidding.
NOTE: This type of invitation is sent if the invited bidder is already prequalified to bid, or when prequalification is not required for the bid package.

Additional Information MHC Network Registration In order to access a project to which you were invited, you must be registered with the MHC Network using the email address to which the invitation was sent. Otherwise, you will be prompted to request access to the project from the plan room owner.

Send Prequalification Information form

- You can download the prequalification requirements form from the Send Prequalification Information Form or from the link provided in the email invitation

OR
You can click on the link provided in the email and submit the qualifications online using the Send Prequalification Information Form, or you can fax your requirements to the plan room owner.

Print
Click the Print button to print the Invitation to Bid.

Reply
You can reply to the Invitation to Bid to let the plan room owner know whether or not you will be bidding by filling out and sending the Response to Invitation form.

To Issue an Invitation to Bid
From the main menu, click the My Plan Room tab to view your hosted projects.
From the My Projects screen, select a project from the Load Projects drop-down menu.
Click the Go button.
From the Manage Project Details screen, click the Bid Packages button.
From the Manage Bid Packages screen, click the checkbox next to the bid package to which you will issue the invitation.
5. Click the Invite button.

6. Click the Add button.

7. From the Filter Companies screen, you can filter the Private Directory to locate the desired recipients.

NOTE: Only companies in My Private Directory will be available for selection. Companies not in your private directory must be added to your private directory to be available for selection as invitation recipients.

8. After filtering and selecting recipients, the Invitation to bid will be displayed again.

9. In the Qualified field, the following criteria and options apply:

   - **Bid Package Requires Prequalification**
     If the company has been prequalified for all projects in the plan room in their company profile in the private directory, then the Qualified checkbox will be checked. In this case, you can un-check the box to require prequalification for this specific bid package. (A Prequalification Requirements form will then be attached to the Invitation to Bid.)

   - **Bid Package Does Not Require Prequalification**
     If the company has been prequalified for all projects in the plan room in their company profile in the private directory, then the Qualified checkbox will be checked. However, as prequalification is not required for this bid package, the field is display only.

10. You have the option of including a message within the Invitation to Bid.

11. Click the Preview button to review the Invitation to Bid prior to sending it. You will then have the option to return to the form to make any changes or to send it. OR Click the Send button to send the Invitation to Bid to all selected recipients.

**How to Send Invitations to Bid**
When you add a company to the McGraw-Hill Construction Network Bid Management Service's Private Directory you will see fields for email and fax. You must enter either an
email address or fax number. If both are entered, the system will automatically default to email and send the ITB via email. The system will not send the ITB through fax as well. The ITBs are only sent through fax when an email address is not present. There is a $.10 per page charge for faxes.

Filtering Invitation Recipients

When sending Invitations to Bid, plan room owners can filter companies selected as recipients using detailed criteria. When you first access the Private Directory Listing screen to filter recipients, the default list will be only bidders from My Private Directory who share the CSI code(s) associated with the bid package. You can filter to change or add to CSI codes or filter by the other available fields, which means you can invite companies who do not share the CSI code associated with the bid package. However, only companies in My Private Directory will be available for selection. Companies not in your private directory must be added to your private directory to be available for selection as invitation recipients. CSI Information

You can select one or more CSI codes.

To Select CSI Codes

1. Click one or more CSI codes

   NOTE: To select multiple codes, either hold down the Ctrl key as you click on each one for codes separately or hold the Shift key as you select the first and last selected CSI code when listed together.

2. Click the right arrow to associate the codes with the company. The codes will display in the box on the right.

   NOTE: To remove a CSI code, select all codes to remove from the right-side field and click the left arrow.

Company Groups

Groups you have created in My Private Directory are listed here to be added as recipients for the Invitation to Bid.

To Select Company Groups

Click one or more company group from the list
NOTE: To select multiple groups, either hold down the Ctrl key as you click on each one for codes separately or hold the Shift key as you select the first and last selected group when listed together.

Location Criteria
You can select the following:

- Location Criteria You can filter by the following:
  - Company Name
  - Contact’s First Name
  - Contact’s Last Name
  - City
  - State
  - Zip
  - Phone Number City starts with -- for example, “New” will return New York, New Jersey, etc.
  - State -- select a state from the drop-down box
  - Zip starts with -- for example, “334” will return 33428, etc.

Custom Fields
If you have created custom fields, you can also filter using information from them. Unlike the City starts with or Zip starts with fields, any part of the custom field text is acceptable search criteria.

Prequalification Status
The default for filtering is to have both Yes and No checked for Prequalified, which means that prequalification is not a consideration in the filtering. You can de-select either checkbox to filter on the other (for instance, if Yes is checked, then only companies who are prequalified are included in the filtering).

Prequalified?  ☑ Yes  ☑ No

Refine Button
1. Once you have selected all your criteria, click the Refine button to retrieve the resulting list of companies.

Note: Click the Clear button to clear all filter fields.
2. Click the checkbox next to each company to select from the filtered list.
3. Click the Select button to include the selected companies as 
   invitation recipients.

 acquired group prior to saving, click the checkbox next to 
 each group to delete and click the Remove button. Be 
 sure the checkbox next to all companies you wish to retain 
 as recipients is unchecked before clicking the Remove 
 button.

Note: Click the Add button to add additional companies as 
recipients of the invitation.

Invitations Requiring Pre-Qualification

Plan room owners may require bidders to be pre-qualified before being permitted to bid on a 
hosted project's bid package. If pre-qualification is required, the Pre-Qualification 
Requirements form is sent to the bidder with instructions on how to submit qualifications. 

Bidders must be registered with the McGraw Hill Construction Network (MHC) to bid 
on projects. When companies try to access a hosted project, they will be prompted to 
register if they do not already possess a MHC Network ID.
The bidder will receive the Pre-Qualification Requirements form in one of two ways: 
An uninvited bidder (public projects only) will be prompted to fill out the form when 
they try to access the bid package online which requires pre-qualification. 
If a bidder is invited to bid on a project that requires pre-qualification, a link to the 
pre-qualification requirements form will be included in the invitation to bid as well as 
the link to the bid package, from which they can submit a form online.

Send Pre-Qualification Information Form
Below is a screen shot of the Send Pre-Qualification Information form:
Pre-qualification Requirements: Qualification Instructions.doc

- Project Name: CIA Garage
- Bid Package Name: XYZ Bid Package

Attach Qualifications: Browse

Message:

**Additional Field Explanation**

**Pre-Qualification Requirements**

From this field, bidders can download the attached instructions for submitting qualifications online using the Sent Pre-Qualification Information Form. This document contains a description of the necessary experience bidders must have to bid on the project as well as instructions for submitting the Send Pre-qualification Information form.

**Attach Qualifications**

In this field, Bidders will attach a document or file containing their qualifications.

**Message**

Bidders can include a message to the plan room owner when submitting qualifications.

**When they complete the form, they will click the Send button to return the form to you.**

**Invitation to Bid with Pre-Qualification**

Below is a screen shot of the Invitation to Bid email for a bid that requires pre-qualification:
Dear Sub-contractor,

You have been invited to review the CIA Garage Project at the McGraw-Hill Construction Network. You will need to be prequalified to bid on this project. Please download and complete the attached Prequalification form and reply to this email or fax it to 555-555-5555.

**Prequalification Form: Prequalification Form.doc**

You may also submit your completed qualification form online when you try to access the bid package by following the link below.

You will be required to register for access to the Network using the email address that this message was sent to, unless you are already a member.

### CIA Garage

390 W Main Street  
Hilsboro, OR (WASHINGTON)  
97123-3948 USA

<table>
<thead>
<tr>
<th>Primary Contact: <a href="mailto:JohnDoe@aol.com">JohnDoe@aol.com</a></th>
<th>Bid Date: December 25, 2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updated Valuation: $100,000 - 200,000</td>
<td></td>
</tr>
</tbody>
</table>

**Bid Package 1**

You can access this private project to review the project details, check for project addenda, order Bid Documents, and request information from the owner.

---

Additional Information

**MHC Network Registration**

Bidders must be registered with the MHC Network using the email address to which the invitation was sent or they will not be able to access the project.

**Send Pre-Qualification Information form**

Bidders can either download the pre-qualification requirements form from a link provided in the email invitation or from a link provided on the Send Pre-Qualification Information form. Bidders can submit qualifications by faxing them to the plan room owner, or submit them online using the Send Pre-Qualification Information form.

Alternatively, bidders can click the bid package link in the Invitation to Bid to be prompted to fill out and submit the form online before reviewing the necessary bid package details.

**Print**

Click the Print button to print the Invitation to Bid.

**Reply**

Bidders can reply to the Invitation to Bid to let the plan room owner know that they received it and are in process of completing the form.

**Update Bidder Prequalification Status**
When a bid package requires prequalification, plan room owners need to update the status of existing bidders on this bid package. Updates are entered on the Update Bidder Status screen. There are three available options for prequalification status:

- **Yes**
- **No**
- **Pending**

If a bidder is invited with prequalification required or a bidder tries to access a public project where prequalification is required, the bidder's status is automatically set to pending until the plan room owner changes it.

If no prequalification is selected when defining the bid package, you cannot update the qualification status and all bidders are marked with a status of N/A.

To Update Qualification Status

1. From the My Projects screen, select a project Load Projects drop-down menu.
2. Click the Go button.
3. From the Manage Project Details screen, click the Status button.
4. From the Manage Status screen, click the Bidders tab to view Bidder Status.

**NOTE:** The bidder list is sorted by Bid Package.

5. Click the checkbox next to the bidder whose prequalification status you want to update.
6. Click the Update button to display the Update Bidder Status screen.
7. From the Update Bidder Status screen, in the Qualification section, click the radio button next to the appropriate status.

If no prequalification is required, all potential bidders gain immediate access and their qualification status is set to N/A.

8. Click the Save button when finished to complete the update.
Update Bidder Status

Bid Package Name: Electrical Package
Company: McGraw-Hill
Contact: Sam Chapman

Response Status
- Will bid
- Will not bid
- Pending

Qualification Status
- Yes
- No
- Pending

Bid Submitted
- Yes
- No

Note: Participants will be notified of status updates.

NOTE: Bidders whose Qualification Status has been updated will automatically be notified of the change. Bidders will not be notified of any other status update (i.e., Response Status, Bid Submitted).

Bid Reminder
Plan room owners can elect to send a form letter reminding bidders of the bidding deadline. If this communication is initiated from a bid package, all those associated with that bid package are selected as recipients by default. However, the owner can modify the recipient list.
You must provide any specific information needed before sending the form. In addition, you have the option of including a personal message in the reminder.
For details on sending notifications to bidders, see the Notify Bidders topic.

When Bidder's Respond to an Invitation to Bid
Companies who receive an Invitation to Bid on a project must reply using the Respond to Invitation to Bid form indicating their bidding intent. Invitees will be prompted to fill out the form the second time they log into the project, and will continue being reminded until the form is filled out and returned to the plan room owner.
Each time they are prompted, bidders are given the option to submit their intent or be reminded later. The "remind me later" option forwards the bidder to the section of the project to which they were originally intending to go. The "submit intent" option forwards the user to the invitation response form. Once the form is sent the user is forwarded to the section of the project they were originally intending to go. Note that bidders may also respond by clicking the Respond button from the view project or bid package details screens.
NOTE: If prequalification is required, the bidder will also need to fill out the Send Prequalification Information form.
If prequalification is approved, the plan room owner can email the bidder a form confirming the prequalification approval.
When qualified, the bidder is free to view the project details, bid package details, and bid documents for the bid packages to which they are invited. They may also download and purchase hard copies of the documents and request information from the plan room owner(s). This access is not affected by the bidder failing to respond to the invitation.

NOTE: Until a response has been received by the owner, the status of the bidder will be Pending in the Update Bidder Status screen.

If the bidder sends the Respond to Invitation to Bid form, the Response Status is automatically updated in the Update Bidder Status screen. Plan room owners can also manually update the status of bidders and the bidder can also update their own status.

If prospective bidders indicate they will not be bidding, the project is removed from their My Invited Projects list. If the plan room owner set a deadline date by which bidding must be submitted, the bidder will be considered to have declined to bid if a response is not received by the end-date. The bidder will be unable to access the project again unless the owner provides access.

Bidder Status Update

Whether a bidder accepts the invitation to bid or not, once the response is received by the plan room owner, the response status is updated in the Update Bidder Status screen. If no response is received by the date designated by the plan room owner for this bid package (see Define & Add a Bid Package for details), the bidder will be considered to have declined the invitation.

For more information on bidder status, see the topic Update Bidder Status.

Award the Bid

Plan room owners receive bids off-line. In the Bid Management Service (BMS), the three status levels for bid submission are: yes, no, and awarded. A status of yes indicates that the company has submitted their bid. A status of no indicates that the company has not submitted their bid. A status of awarded indicates that the company has been awarded the bid. Awarded status is automatically assigned by the BMS when the award notice is sent by the owner. Plan room owners can update the yes or no status through the Update Bidder Status screen. The owner cannot update a bidder’s status to “awarded” manually. The Award notification sent to the winner indicates that the bid has been awarded to them. The owner chooses whether to send the Award notice only to the winner, or to all bidders.

NOTE: Bids must be awarded one bid package at a time.

To Award a Bid Package

1. From the main menu, click the My Plan Room tab to view your hosted projects.
2. From the My Projects screen, select a project from the Load Projects drop-down menu.
3. Click the Go button.
4. From the Manage Project Details screen, click the Bid Packages button.
5. From the Manage Bid Packages screen, click the Award button.
6. From the Award Notification form, click the down arrow in the Select Winner field to pick the winning bidder.
7. The default is to automatically notify all companies who have bid on this project. Click the Notify awarded contractor only radio button to limit this correspondence to only the winning bidder.
The notification to bidders other than the winner does not reveal the name of the winning bidder, but just the fact that the bid was awarded.
Type an optional message in the Message field.
Click the Send button to send the Award Notification to all selected recipients.

How to Communicate with Bidders
Communication is established in the Bid Management Service (BMS) between plan room owners and bidders after a hosted project is set up, bid packages are added, and bidders have been invited or have accessed public projects.
Initiating communication between owners and bidders occurs through the Notify process.
Tracking and managing of communication occurs in the Status area of the Manage Project section of BMS.
Communication is via email or fax.

All project communication is stored in the plan room owner's Inbox. Therefore, when communication is sent from the Bid Management Service by the owner to a bidder, a notice is sent via email or fax that there is a message waiting in the bidder's project Inbox.
The Status Area
Through the Status area, owners can monitor each bidder's progress through the bidding process. The Status area contains:
The project Inbox
Sent Items
Bidder Status

Owners all share one Project Inbox and Sent Items box since each owner can manage the project and needs to be privy to all project communication. Email notices are only sent to the primary owner contact (as selected in the project details) for the project.
For ease of use, much of the communication is automated based on the owner's activity selection. You can add an optional message to most communications as well.
For example, you can filter companies by CSI code, location, custom fields, etc. For further details on this process, see the Notify topic.
Plan room owners can send the following communication to bidders:
Invitation to bid
Qualification notice
Response to request for information
Award notice

• Notifications
  ○ Change to project notice (bid dates, times, details, etc.)
• Notice of addenda
• Bid reminder
• Project closure notice
• Correspondence (miscellaneous messages)

In the course of managing bidding, plan room owners will send the following types of notifications to bidders through the Notify Bidders form:

• Change to project notice (bid dates, times, details, etc.)
• Notice of addenda
• Bid reminder
• Project closure notice
• Correspondence (general messages not fitting into other categories)
  • If a notification is sent within the context of a bid package, companies that can be selected are limited to those invited to the bid package.
  • If a notification is sent about the overall project but not a specific bid package, then the notification is restricted to companies with a bidding status of bidding or pending on any project in the plan room.

You select notification recipients from My Private Directory and can use detailed filtering criteria.

For example, you can filter companies by CSI code.

There are two ways to send notifications:

The Notify button

Clicking this button will take you to the Notify Bidders screen, where you fill out the appropriate notification form. The Notify button is available on the following screens:

My Projects screen
Manage Product Details screen
Manage Status screen
Manage Bid Packages screen

NOTE: this option enables you to include a message with the notification as well as attaching or faxing information.

Notify All Invited Bidders checkbox (for Notice of Addenda)

☑ Notify project bidders of any changes made on this form

Tasks that allow a Notice of Addenda contain this option. These tasks include editing project details, editing bid package details, and adding or editing documents for a bid package. On screens where this option is available, an automated message will be sent to invited bidders alerting them to the project/bid package changes when doing the following:

Adding Bid Documents to Bid Packages
Editing a Bid Package
Editing Project Details

You cannot include a personalized message or attachments in the automated Notice of Addenda, but a link will be provided in the notice along with instructions for accessing the new information.

How to Notify Bidders
NOTE: Navigation to the Notify Bidders screen in these instructions will be from the My Projects screen. However, the Notify button is available on the My Projects screen, Manage Product Details screen, Manage Status screen, and Manage Bid Packages screen.

1. From the main menu, click the My Plan Room tab to view your hosted projects.

2. From the My Projects screen, select a project and click the Notify button.

3. From the Type of Notification field in the Notify Bidders screen, click the down-arrow to select the type of notification to send from the Type of Notification drop-down menu.

NOTE: Selecting a type of notification is used for sorting purposes by the plan room owner.

4. In the Subject field, type the subject this notification addresses.

5. In the Selected Companies section, click the click the Add button to pick recipients for receipt of this notification. (You will select recipients from My Private Directory.)

NOTE: The list of selected recipients displays in the Selected Companies section for the selected project.

For details on selecting companies for notification, see the topic Filter Recipients.

NOTE: You may only send the notification to companies with a bidding status of bidding or pending.

6. Once you have selected recipients and have returned to the Notify Bidders screen, in the Attached Files field, click the Add button to locate files locate files from the project’s bid documents. Click the browse button to locate a file on your computer.

NOTE: The list of attached files displays in the field after selection.

7. Once you have selected files and returned to the Notify Bidders screen, click the checkbox next to Fax Attachments if you want the attachments faxed to bidders who are not interacting online. Click the checkbox next to Send links only instead of files for email to decrease the size of the email.

8. In the Message field, you can send an optional message with additional information.
For example: If you select the Project Closure Notice, you might include a message giving the reason for the closure.

9. When you are finished, click the Send button.

☐ Fax Attachments (to participants who communicate via fax only)

☐ Send links only instead of files for email

[Send] [Cancel]

Email from Uninvited Subcontractors

Email from uninvited subcontractors to a project are only viewable via the plan room owners’ personal email service. The emails will not be in the plan room owner’s Inbox on the McGraw-Hill Construction Network Bid Management Service regardless of whether the subcontractor is already in the plan room owner’s private directory or not. Only after the plan room owner invites the subcontractor to a bid package in the project will subsequent emails appear in the plan room owner’s Inbox.

Plan Room Owner’s Inbox

All plan room owners share one Inbox for each project. Communication between the plan room owners and bidders is established once the bidder has been invited or, in some cases, when bidding is in progress for an open project. Contained within the Inbox are all inbound messages and fax communications to the project owners from the bidders sent through the Bid Management Service (BMS) for the specific project.

Plan room owners can receive the following communication from bidders:

- Invitation to bid response
- Request for information
- Qualifications submission
- Replies to notifications from owners
- Inbound faxes

Default Inbox settings are as follows:
- Sorting is by date/time, with the most recent message on top
- Up to 25 messages display on the initial page

Owners can alter sort order by clicking on the column headers. When there are more than 25 messages, owners can change the default to 50 or 100 messages displayed on one page.

To View the Inbox Contents from an Active Hosted Project

There are three ways to access the Inbox:

Method 1

From the main menu, click the My Plan Room tab to view your hosted projects. Click on the hyperlinked name of any Active hosted project in your list.
Method 2
From the main menu, click the My Plan Room tab to view your hosted projects. From the My Projects screen, select a project from the Load Projects drop-down menu.

Method 3 - When the project is not Active
From the main menu, click the My Plan Room tab to view your hosted projects. From the My Projects screen, select a project from the Load Projects drop-down menu. From the Manage Project Details screen, click the Status button.

From the Inbox, you can notify bidders, print a user-friendly version of the message list, or delete a specific message. NOTE: In addition to standard address information, the type of notification received is displayed (e.g., Request for Information, Invitation to Bid Response).

To Respond to Correspondence
1. From the Inbox, click the message to which you want to respond.

   NOTE: The type of correspondence is displayed in the Type field.

   2. From the displayed message, click the Respond button.

   NOTE: You can also print the message.
3. Type a response to the message.

4. Click the Send button.

When the owner responds to the request, the bidder is automatically selected as the recipient by default. However, the owner can opt to send the response to any combination of the participants on the project.

Note: A copy of the correspondence will be in the Sent Items.

To Delete a Message

1. From the Inbox, click the checkbox next to the message(s) to delete.

2. Click the Delete button.

The message(s) will be removed from the owners’ project Inbox. However, the message(s) will remain in the sender's Sent Items box and in the database, marked for deletion.

**Plan Room Owner's Sent Items**

For each project, plan room owners maintain a history of all outbound faxes and messages sent through the Bid Management Service (BMS) to bidders. All owners share one Sent Items box per project.

Plan room owners can send the following communication to bidders:

- Invitation to bid
- Qualification notice
- Response to request for information
- Award notice

* Notifications
  - Change to project notice (bid dates, times, details, etc.)
  - Notice of addenda
  - Bid reminder
  - Project closure notice
  - Correspondence (miscellaneous messages)

Default Sent Items settings are as follows:

* Sorting is by date/time, with the most recent message on top

Owners can alter sort order by clicking on the column headers

Up to 25 messages display on the initial page

When there are more than 25 messages, owners can change the default to 50 or 100 messages displayed on one page.

To View Sent Items
From the Inbox, click the Sent Items tab.  
**NOTE:** The default view is the Inbox.  
In addition to standard address information, the type of notification sent is displayed (e.g., Request for Information, Invitation to Bid Response).  
If communication was sent to multiple companies, the first three will display in the To field.  
From here, you can notify bidders, print a user-friendly version of the message list, or delete a specific message.  
To Delete a Message  
Click the checkbox next to the message(s) to delete.  
Click the Delete button.  
The message(s) will be removed from the owners’ Sent Items box. However, the message(s) will remain in the sender’s Inbox and in the database, marked for deletion.  

**Bidders Tab - Manage Bidders Status**  
The Bidders tab is available in the plan room owners’ Inbox. This feature displays all the bidders associated with a bid package.  
The project name and details are listed above the Bidders tab. The default view of the Bidders tab is:  
- An alphabetical listing of bid packages with an alphabetical listing of bidders under each package  
Owners can alter sort order by clicking on the column headers.  
If bidders are interacting with multiple packages, they will be listed under each package.  
Up to 25 listings display on the initial page.  
When there are more than 25 listings, owners can change the default to 50 or 100 listings displayed on one page, ongoing.  

Owners can toggle this view to display bidders who have responded “yes, I will be bidding” only by clicking the Show bidders only checkbox.
To View the Bidder Screen
From the Inbox, click the Bidders tab.

Additional Field Explanation
Contact information, including CSI codes, on this screen is derived from the information in the plan room owner's My Private Directory.

Qualified
If the bidder has been prequalified to perform the necessary tasks for the project, this field will display Yes. Otherwise, depending on the status, this field can display No, Pending, or N/A (if prequalification is not required for the bid package).

Bid Packages can require prequalification before bidding. Until a bidder is prequalified for these bid packages, they will not be allowed to view the bid package details or documents.

Response
The status of the bidder's response is displayed.
For example, will bid, will not bid, or pending

Bid Submitted
This field will reference the status of the bid.
For example, Yes, No, or Awarded

In the Bidders screen, you can perform the following tasks:
Invite
Invite new bidders to a project
Notify
Send notifications to bidders (e.g., Addenda to project, Award)
Update
Update the status of a particular bidder (e.g., prequalification, response, bid submitted) for the selected participant.

When a plan room owner changes a bidder's qualification status, a notification is automatically emailed to the bidder indicating the change.

NOTE: When a bidder sends a response to invitation, the response status is automatically updated to show their response.

Print
Print a user-friendly version of the bidder list.

Revoke
Removes access to a bid package for a bidder. The project will be removed from the invited projects list for a bidder. When access is revoked, the project will be removed from the bidder's invited projects list. If this is a public public project, uninvited bidders will not be able to access the Bid Management Service (BMS) and regain access to the bid package without permission. Bidders will be alerted by email that their access has been revoked.

If a bidder, invited or otherwise, has access to other bid packages, access for those bid packages will remain enabled and the project will remain in My Invited Projects list.

**Update Bidder Status**
After sending prospective bidders an Invitation to Bid, plan room owners can update the status of the bid in the Update Bidder Status screen.

To Update Bidder Status
From the main menu, click the My Plan Room tab to view your hosted projects.
From the My Projects screen, select a project from the Load Projects drop-down menu.

From the Manage Project Details screen, click the Status button.
From the Manage Status screen, click the Bidders tab to view Bidder Status.

5. Click the checkbox next to the bidder whose status you want to update.
6. Click the Update button to display the Update Bidder Status screen.
Update Bidder Status

**Bid Package Name:** Electrical Package  
**Company:** McGraw-Hill  
**Contact:** Sam Chapman

<table>
<thead>
<tr>
<th>Response Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will bid</td>
</tr>
<tr>
<td>Will not bid</td>
</tr>
<tr>
<td>Pending</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Qualification Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>Pending</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bid Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

**Note:** Participants will be notified of status updates.

Click the radio button next to the appropriate status within the appropriate category. Click the Save button (not shown in above screen shot) when finished to complete the update.

**NOTE:** Bidders whose prequalification status has been updated will automatically be notified of the change.

**Send Message to Bidders**
Plan room owners can send a message to companies in their **private directory**. The owner has the following options:
- Send the message to contacts with email only
- Send the message to both email and fax-only company contacts
- Send to the entire private directory
- Send to selected company contacts

**Note:** By default, all companies listed in your private directory will display in the Private Directory Listing filtering screen. You can then refine this list using filters. Companies not in your private directory must be added to your private directory to be available for selection as group members.

Messages sent from the private directory will not be saved in the **Bid Management Service (BMS)**, but you can elect to copy yourself as an email recipient. If you are a recipient, a list of the other recipients to whom the message was sent will be listed in the body of the message you receive. The recipients selected from the private directory will not see the list of other recipients. The message will appear as if it were only sent to them.

**Additional Charges**
When sending messages to a fax, plan room owners will see a warning that there is a $0.10 charge per faxed page. You must accept these charges from a pop-up warning message that displays to continue, or use the option to return to the message form to change the setting to “Send email only.”

There are three ways to select companies as message recipients:
- Click the checkbox next to each company to include in My Private Directory screen and clicking the Message button
- Select the All Companies in My Private Directory option in the Message form
- Filter to select companies from the Message form by selecting the Selected Companies option

To Send a Message to All Companies

1. From the My Plan Room Links menu on the left, click Private Directory.

2. From the Manage Private Directory screen, click the Messages button.
   **Note:** If you clicked the checkbox next to any companies in My Private Directory prior to clicking the Message button, those companies will automatically display as message recipients in the Message form.

3. In the Message form, type a subject in the Subject field.

4. Leave the default recipient list, which is All companies in My Private Directory.

5. In the Message field, type the message.

6. Click the checkbox next to Send faxes to fax only users if you want to send the message to both bidders with email addresses as well as those who are fax only bidders.

**IMPORTANT:** The default is to send the message only to email addresses. Sending faxes will cause you to incur a charge of $0.10 per faxed page. You will have to confirm that you accept these charges before the message is sent.
8. Click the checkbox next to Email a copy of this message to me? to receive a copy of the message to retain for your records.

   - [ ] Send faxes to fax only users (will incur an additional charge)?
   - [ ] Email a copy of this message to me?

NOTE: Your copy of the message will include a list of all recipients. You will need to select this option if you want to retain the message, which will be delivered to your registered SSO ID email address.

9. When finished, click the Send button.

   ![Send and Cancel buttons]

To Send a Message to Specific Companies

1. Follow steps 1-3, above.

2. From the Message form, click the Selected Companies radio button.

3. Click the Add button. A new window will open allowing you to filter the list of companies according to their profile information.

4. Select the filter criteria.

5. Once you have selected all your criteria, click the Refine button to retrieve the resulting list of companies.

   Note: Click the Clear button to clear all filter fields.

6. Click the checkbox next to each company to select from the filtered list.

7. Click the Select button to include the selected companies as message recipients.

8. When you have finished adding all recipients and completed your message, click the Send button. After the message is sent, the Manage Private Directory screen displays.

   ![Send To: All companies in My Private Directory, Selected Companies, Add, Remove, Refine, Clear, Add, Remove, company, Humanovations, McGraw-Hill Construction, Select, Cancel]
Note: If you want to delete any recipients prior to sending your message, click the checkbox next to each recipient to delete and click the Remove button. Be sure the checkbox next to all recipients you wish to retain is unchecked before clicking the Remove button.

Note: You can click the Add button to add additional recipients before sending your message.

Filter Message Recipients

When sending messages to bidders, plan room owners can filter companies selected as message recipients. Note: By default, all companies listed in your private directory will display in the Private Directory Listing filtering screen. You can then refine this list using filters. Companies not in your private directory must be added to your private directory to be available for selection as recipients.

Below is an explanation of the screen for filtering companies. CSI Information You can select one or more CSI codes.

To Select CSI Codes
1. Click one or more CSI codes
   NOTE: To select multiple codes, either hold down the Ctrl key as you click on each one for codes separately or hold the Shift key as you select the first and last selected CSI code when listed together.
2. Click the right arrow to associate the codes with the company. The codes will display in the box on the right.
   NOTE: To remove a CSI code, select all codes to remove from the right-side field and click the left arrow.

Company Groups Groups you have created in My Private Directory are listed here to include as message recipients.

To Select Company Groups
Click one or more company group from the list
NOTE: To select multiple groups, either hold down the Ctrl key as you click on each one for codes separately or hold the Shift key as you select the first and last selected group when listed together.

Location Criteria You can select the following:

• Location Criteria You can filter by the following:
  
  Company Name
  Contact's First Name
  Contact's Last Name
  City
  State
  Zip
  Phone Number
  City starts with -- for example, "New" will return New York, New Jersey, etc.
  State -- select a state from the drop-down box
  Zip starts with -- for example, "334" will return 33428, etc.

  City starts with:  State:  Zip starts with: 

Custom Fields

If you have created custom fields, you can also filter using information from them. Unlike the City starts with or Zip starts with fields, any part of the custom field text is acceptable search criteria.

  Region contains:  MBE/WBE contains:  Bonding Ca... contains: 

Prequalification Status The default for filtering is to have both Yes and No checked for Prequalified, which means that prequalification is not a consideration in the filtering. You can de-select either checkbox to filter on the other (for instance, if Yes is checked, then only companies who are

Refine Button

1. Once you have selected all your criteria, click the Refine button to retrieve the resulting list of companies.

Note: Click the Clear button to clear all filter fields.

Click the checkbox next to each company to select from the filtered list.
Click the Select button to include the selected companies as
message recipients. When you have finished adding all recipients and completed your message, click the Send button. After the message is sent, the Manage Private Directory screen displays.

Note: If you want to delete any recipients prior to sending your message, click the checkbox next to each recipient to delete and click the Remove button. Be sure the checkbox next to all recipients you wish to retain is unchecked before clicking the Remove button.

before sending your message.

Respond to a Request for Information (RFI)
Once a bidder receives an invitation, the bidder can submit an RFI to the plan room owner. When the owner responds to the request, the bidder is automatically selected as the recipient by default. The owner can opt to send the response to any combination of the participants on the project by filtering recipients.

Notify Bidders
In the course of managing a project, plan room owners will send the following types of notifications to bidders through the Notify Bidders form:
Change to project notice (bid dates, times, details, etc.)
Notice of addenda
Bid reminder
Project closure notice
Correspondence (general messages not fitting into other categories)

You can only communicate with bidders if a project is Active.
When you first access the Invited Bidders Listing screen to filter recipients, the default list of bidders for selection will be based on the following:
If you are sending a notification from a specific bid package, the default list will be only those bidders who have been invited to bid on this bid package and whose status is either Bidding or Pending.
If you are sending a notification from a the project as a whole, the default list will be all bidders who have been invited to bid on any bid package in the project and whose status is either Bidding or Pending.

You may only filter on the respective invited bidders.
For example, if you are sending a notification from Bid Package A, a company in My Private Directory who has not been invited to bid on Bid Package A cannot be
selected as a notification recipient. This, therefore, precludes any company from the Not in my private directory for inclusion.
A detailed filter criteria is provided for very specific recipient selection.
For example, you can filter companies by CSI code, location, custom fields, etc.
There are two ways to send notifications:
The Notify button

Clicking this button will take you to the Notify Bidders screen, where you fill out the appropriate notification form. The Notify button is available on the following screens:
My Projects screen
Manage Product Details screen
Manage Status screen
Manage Bid Packages screen

NOTE: this option enables you to include a message with the notification as well as attaching or faxing information.
Notify All Invited Bidders checkbox (for Notice of Addenda)

☑ Notify project bidders of any changes made on this form

Tasks that allow a notice of addenda contain this option. These tasks include editing project details, editing bid package details, and adding or editing documents for a bid package. On screens where this option is available, an automated message will be sent to invited bidders alerting them to the project/bid package changes. This option is available on the following screens:
Add Bid Documents to Bid Packages
Edit Bid Package
Edit Project Details

You cannot include a personalized message or attachments in the automated Notice of Addenda, but a link will be provided along with instructions for accessing the new information.
Send Notification to Bidders
From the Notify Bidders screen, you will select the type of notification to send from the Type of Notification drop-down menu. Fill out the online form as relevant to the type of notification selected.

<table>
<thead>
<tr>
<th>Type of Notification</th>
<th>Select a Notification Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Select a Notification Type</td>
</tr>
<tr>
<td>Send To</td>
<td>Change to project notice</td>
</tr>
<tr>
<td>Notice of Addenda</td>
<td>Bid reminder</td>
</tr>
<tr>
<td>Project closure notice</td>
<td>Correspondence</td>
</tr>
</tbody>
</table>

For example: If you select the Project Closure Notice, you might include a message giving the reason for the closure.
NOTE: Selecting a type of notification is used for sorting purposes by the plan room owner.
In the Type of Notification field, click the down arrow to select a notification category.
In the Subject field, type the subject of this notification.
Click All companies bidding on this project to automatically select the
recipients. OR
A. Click Selected Companies to filter which recipients to select.
B. Click the Add button to select recipients for the notification from the Invited Bidder Listing screen.

Once the recipients are selected and the Notifications form displays, click the checkbox next to Fax Attachments for bidders who are not interacting online if you want all attachments faxed. Click the checkbox next to Send links only instead of files for email to decrease the size of the email. In the Message field, you can send an optional message with additional information. You can attach files to notifications:

- Fax Attachments (to fax only participants only)
- Send links only instead of files for email

**Bid Documents**
1. In the Attached Bid Docs field, click the Add button to locate files to select from documents in the Bid Management Service (BMS) to include with the notification.
2. Click the tab where the documents to attach are located.
3. Click the checkbox next to each file to attach.
4. Click the Save button to complete the process.

**Other Files**
In the Attached Files field, click the Browse button to locate files on your computer to attach to the notification.
Note: You can only attach one file from your computer to the notification.
7. When you are finished, click the Send button.

Filtering Bidders for Notification
When sending notices to bidders, such as a Notice of Addenda or an Invitation to Bid, plan room owners can filter bidders selected as recipients using detailed criteria. When you first access the Invited Bidders Listing screen to filter recipients, the default list of bidders for selection will be based on the following:

If you are sending a notification from a specific bid package, the default list will be only those bidders who have been invited to bid on this bid package and whose status is either Bidding or Pending.
If you are sending a notification from the project as a whole, the default list will be all bidders who have been invited to bid on any bid package in the project and whose status is either Bidding or Pending.

You may only filter on the respective invited bidders. For example, if you are sending a notification from Bid Package A, a company in My Private Directory who has not been invited to bid on Bid Package A cannot be selected as a notification recipient. This, therefore, precludes any company from the Not in my private directory for inclusion.
Companies not in your private directory must be added to your private directory to be available for selection as invitation recipients.

CSI Information You can select one or more CSI codes.

To Select CSI Codes
1. Click one or more CSI codes
NOTE: To select multiple codes, either hold down the Ctrl key as you click on each one for codes separately or hold the Shift key as you select the first and last selected CSI code when listed together.
2. Click the right arrow to associate the codes with the company. The codes will display in the box on the right.
NOTE: To remove a CSI code, select all codes to remove from the right-side field and click the left arrow. Company Groups Groups you have created in My Private Directory are listed here to be

To Select Company Groups
Click one or more company group from the list
NOTE: To select multiple groups, either hold down the Ctrl key as you click on each one for codes separately or hold the Shift key as you select the first and last selected group when listed together.
Location Criteria You can select the following:

- Location Criteria You can filter by the following:
  Company Name
  Contact's First Name
  Contact's Last Name
  City
  State
  Zip
  Phone Number

- City starts with -- for example, "New" will return New York, New Jersey, etc.
- State -- select a state from the drop-down box
- Zip starts with -- for example, "334" will return 33428, etc.

Custom Fields If you have created custom fields, you can also filter using information from them. Unlike the City starts with or Zip starts with fields, any part of the custom field text is acceptable search criteria.

Prequalification Status The default for filtering is to have both Yes and No checked for Prequalified, which means that prequalification is not a consideration in the filtering. You can
de-select either checkbox to filter on the other (for instance, if Yes is checked, then only companies who are prequalified are included in the filtering).

Prequalified?  ☑ Yes  ☐ No

Refine Button

5. Once you have selected all your criteria, click the Refine button to retrieve the resulting list of bidders.

Note: Click the Clear button to clear all filter fields.

• Click the checkbox next to each company to select from the filtered list.

3. Click the Select button to include the selected companies

Note: If you want to delete any companies from the newly created group prior to saving, click the checkbox next to each group to delete and click the Remove button. Be sure the checkbox next to all companies you wish to retain as recipients is unchecked before clicking the Remove button.

Note: Click the Add button to add additional companies as notification recipients.

Alert Bidders to Bid Package Addenda

Plan room owners can send bidders a Notice of Addenda form letter when bid package documents are added, modified, or removed. You must provide any required information needed before sending the form. In addition, you have the option of including a personal message in the notice.

You can initiate a Notice of Addenda from a hosted project or from a bid package. If a notification is sent about the overall project but not a specific bid package, then the notification is restricted to companies with a bidding status of bidding or pending. If a notification is sent within the context of a bid package, companies that can be selected are limited to those invited to the bid package. If the notice is sent manually, you will be able to customize the message. If the notice is sent by checking the Notify all invited bidders box, an automated message is sent.

Notify All Invited Bidders checkbox

☑ Notify project bidders of any changes made on this form
Tasks that require a Notice of Addenda contain this option. These tasks include adding or editing documents for a bid package. The default is to include all invited bidders as recipients. On screens where this option is available, an automated message will be sent to invited bidders alerting them to the project/bid package changes when performing the following tasks:

- Add Bid Documents to Bid Packages
- Edit Bid Package
- Edit Project Details

You cannot include a personalized message or attachments in the automated Notice of Addenda, but a link will be provided along with instructions for accessing the new information.

**Alert Bidders to a Change in the Project**

A plan room owner can elect to send bidders notification of changes to a hosted project in the form of the automated Change to Project Notice. If owners edit project or bid package details, they will be prompted to send this automated message, which outlines the project modifications. In this case, all of the bidders on the associated project are selected by default as recipients. The owner can de-select recipients as needed.

You must provide any required information needed before sending the form. In addition, you have the option of including files and a personal message in the notice.

For details on sending an automated notification, see the Notify All Invited Bidders Checkbox section in the How to Communicate with Bidders topic.

**Alert Bidders to Project Closure**

If a plan room owner closes a project, bidders will receive a Project Closure Notice informing them that the project is closed and no longer available. You will need to provide required information before sending the form. In addition, you have the option of including a personal message in the notice.

**Bidders Overview**

Bidders are subcontractors vying for contracts in the Bid Management Service (BMS). The BMS creates a seamless method for the bidding process, giving bidders quick and easy ways to manage their bids.

**NOTE:** Bidders do not require a BMS license, but must be registered as a user of the McGraw-Hill Construction Network.

Entry into the BMS is via the plan room tab on the McGraw Hill Construction Network (MHC) main menu.

The initial view is the Invited view, which will display projects on which you are currently bidding or have been awarded. If you have no projects on which you are already bidding, when you enter the BMS, no projects display.
Bidders can access hosted projects in two ways:
Searching for a specific public project using the unique BMS key
After receiving an invitation for a public or private project

Search for Hosted projects
Searching for projects is easy. The Find a hosted project control enables you to enter the unique BMS key to locate public projects.

Find a Hosted Project: [Enter unique BMS key] Find

There are three basic areas in which bidders will perform most of their activities:
View project status
View project details
View bid package details

View Status
From the Invited view, click the hyperlink on any project name to access the View Project Details screen.
Click the Status button to display the View Status screen, which contains the Inbox.

To View Project Details
Either select a project from the Load projects drop-down, which displays on most screens in the BMS. OR Click the hyperlink name of the project in the Invited view control.
The View Project Details screen displays so you can view information about projects on which you are currently bidding or have been awarded.

Among the activities you will perform from the View Project Details screen are:
Respond to invitations to bid
View bid packages to which you have been invited, and their associated bid documents
Order or download hard copies of bid documents
Request more information

Bidders will communicate with plan room owners through their Inbox.
Bidders Inbox
When in the View Project Details screen, bidders will click the Status button to access their project Inbox and Sent Items.

From here, bidders can perform the following tasks:
View invited project details
Request information
Read and respond to various notifications (e.g., change in project, notice of addenda to bid packages)
View bid packages
Print or delete projects

Bidders View of the BMS
Bidders view the Bid Management Service (BMS) from the invited projects point of view. When entering the BMS, the Invited Projects view on the View Projects screen is their initial view.

Load Projects This control displays across nearly all BMS screens for bidders. Bidders can access a project to which they were invited (or to which they have self-invited themselves by entering a public project). From this field, bidders select the function they want to perform on their invited projects. This control will display on most screens within the BMS. Bidders will not see an Edit button.

Below that option, all projects to which the bidder is invited, and to which their bidding status for at least one bid package is Bidding or Pending will be listed. When one of these projects is selected, the “Go” button becomes active (blue) and when clicked takes the bidder to the View Status Inbox screen for the selected project. If this is the first time the bidder has accessed the service, or if the bidder has no hosted projects, no projects will display.

NOTE: If bidders are plan room owners as well, clicking the Hosted tab will display the list of their hosted projects. Otherwise, instructions on hosting projects display.

Inbox
Bidders will access their Inbox by:

1. Clicking on the name of the invited project in My Invited Projects.
2. Clicking the Status button.

Public VS. Private Hosted Projects
Projects hosted in the Bid Management Service (BMS) are either public or private. Public hosted projects can be viewed by any member of the McGraw Hill Construction (MHC) Network. This type of hosted project is normally shared with McGraw-Hill Editorial and a link to these types of hosted projects will be available from the MHC Network. Companies who access a public hosted project in the BMS are automatically allowed to view the project and must follow the same procedures as those who are invited by the plan room owner. Private hosted projects are available to invited bidders only. Any company without an invitation must request access from the plan room owner (this is the contractor). An option to request access from the plan room owner will be displayed the first time you attempt to access a private project.

Below is a screen shot of the Request for Access form.
Request Access - CIA Garage

The CIA Garage project hosted by XYZ Contractors requires that you be invited to bid in order to access it. There is not an existing invitation for your email address. Use this form to request an invitation to bid from the project contact.

To: Joe Schmoe
Company: ABC Construction
Message:

After filling out the form, bidders will click the Request Access button to submit the request to the plan room owner.

For information on how to search for a BMS hosted project from the MHC Network Network, see the topic Find an MHC Project that is Hosted in the BMS.

For information on how to search for a BMS hosted project inside the BMS, see the topic Locate a Hosted Project from the BMS.

Find an MHC Project that is Hosted in the BMS

Any McGraw Hill Construction Network (MHC) user can locate public projects that are hosted in the Bid Management Service (BMS). If a Network project is hosted in the BMS, there will be a hyperlink in the Project's Dodge Report to the hosted project.

Locate a Hosted Project from the BMS

All McGraw Hill Construction Network (MHC) SSO users can access the Bid Management System (BMS). However, if this is your first visit or you have no invited projects, you will see information on how to become a bidder in the BMS.

When you access the BMS, you can search for existing public and private hosted projects using the BMS designated key for the project.

To Search for a Project from within the BMS

1. From the MHC Network, click the My plan room tab in the main menu.

2. From the View Projects screen, type the unique project key (assigned automatically by the BMS when the hosted project is created or transferred from the Network) in the Find a Hosted Project field.

3. Click the Find button. If you have been invited to the project or if the project is a public project, you will be taken to the View Project Details screen for the project.
If you have not been invited to the project (or have been uninvited to a project), and that project is a private project, a message displays indicating that you do not have access to the found project. You will then be given the option to request access from the plan room owner.

**View Invited Projects List**

When bidders enter the Bid Management Service (BMS), the Invited tab in the View Projects screen displays all projects to which they have been invited to bid (except those to which they responded with a decline to bid). If you have not been invited to any projects, you will see information on how to bid on hosted projects.

**NOTE:** If you click on the My plan room tab and you do not have a BMS license, instructions on how to become a plan room owner display. If you have hosted projects, the list will display. From this screen, you can also delete any project to which you have been invited.

**View Project Details**

Bidders can view details of public projects and those to which they have been invited (both public and private). From the View Project Details screen, you will see:

- The bid package name
- CSI codes assigned to the bid package
- The number of bid documents in the bid package
- The bid package bid date

From this screen, you can:
- Order bid documents
- Send a Request for Information (RFI)
- Respond to an Invitation to Bid

To View Details of a Project

1. From the MHC Network, click the My plan room tab in the main menu.

2. From the View Project Details screen, click the name of the project (this will be a hyperlink) to display the details of the project.

**Download Bid Documents**

Once bid documents have been added to a package, bidders may download one file at a time or multiple files at once. If downloading multiple files at one time, the files will be compressed into a self-extracting zip file by the system.

To Download for the Bid

- From the main menu, click the My Plan Room tab to view your hosted projects.
- From the My Projects screen, select a project from the Load Projects drop-down menu.
2. Click the Go button.
3. From the View Status screen, click the Bid Packages button.
4. From the View Bid Packages screen, click name of bid package.
5. From the View Bid Package Details screen, click the checkbox next to the document(s) to download from the Plans, Specs, Addenda, or Other category.
6. Click the Download button.
7. Follow the prompts to download the documents.
8. How Bidders Order Bid Documents

Hard copies of bid documents and files can be ordered through the Bid Management Service (BMS). When ordering, the information will be passed to the Network shopping cart for processing.

There are two ways to order bid documents:
1. Order bid documents individually (e.g., specific plan or spec files)
2. Order all bid documents associated with a bid package

To Order Bid Documents Individually
1. From the main menu, click the My Plan Room tab to view your invited projects.
2. From the My Projects screen, select a project from the Load Projects dropdown menu.
3. Click the Go button.
4. From the View Status screen, click the Bid Packages button.
5. From the View Bid Packages screen, click name of the bid package.
6. From the View Bid Package Details screen, click the checkbox next to the document(s) to order from the Plans, Specs, Addenda, or Other category.
7. Click the Order button to fulfill your order in the Network shopping cart and follow instructions in the cart to complete your order.
8. From the Shopping Cart Checkout screen, you can either:
Click the Place Order button to enter your billing and address information

OR

1. Click the Options button.

2. From the Options screen, you can make additional selections, such as shipping preference, format of plans and specs, and provide special instructions, as well as requesting a bid form.

3. When done, click the Continue button to return to the shopping cart.

9. From the shopping cart, click the Place Order button to enter your billing and address information

10. After entering your billing and address information, click the Place Order button to finish the process.
To Order All Bid Documents for a Bid Package

1. Follow steps 1-4 above.

2. From the View Bid Packages screen, click the checkbox next to the bid package containing the documents you want to order.

3. Click the Order button to display the Network shopping cart.

4. Follow steps 8-10 above to complete your order.

Delete an Invited Project

Hosted project bidders may delete any of their invited projects by responding to an invitation and indicating you will not be bidding or by deleting it from the My Invited list.

To Delete a Project to Which You Have Been Invited

1. From the MHC Network, click the My plan room tab in the main menu.

2. From the My Invited Projects screen, click the check-box next to the project to delete.
3. Click the delete button. This project is removed from the Invited screen.

Bidders may reinstate the project by:
Using the hyperlink from their email invitation
Entering the unique project key into the Find Hosted Project control
Having the owner update the bidder’s status to Will Be Bidding or sending the respond to invitation form again and indicating that the bidder will be bidding.

Any of these actions will cause the deleted project to be available and displayed in the bidder's list of invited projects.

**Respond to an Invitation to Bid**

There are two types of invitations issued to prospective bidders:
Invitations for bid packages requiring prequalification
Invitations for bid packages requiring no prequalification

**NOTE:** If prequalification is required, the bidder will need to fill out a Send Prequalification Information form before being able to respond.

Companies who receive an Invitation to Bid on a project must reply with a Respond to Invitation form indicating their bidding intent. If you indicate you will not be bidding, the project is deleted from your My Invited Projects list. If the plan room owner set a deadline date for which bidding must be submitted, the bidder will be considered to have declined to bid if a response is not received by the end-date, and will be unable to access the project again unless the owner provides access.

The Response to Invitation form will be available in the bidder's Inbox. Prospective bidders will be prompted to fill out the response form beginning with the second time they log into the project after receiving the invitation, and will continue being reminded until the form is filled out and returned to the plan room owner. When prompted:

Bidders can opt to be reminded later
Bidders can opt to submit their intention to bid, and be forwarded to the invitation response form

Bidders can also respond at any time by clicking the Respond button from the View Project or View Bid Package details screen.

1. From the View Projects Details screen, click the checkbox next to the bid package to which you want to respond.
2. Click the Respond button.

3. From the Respond to Invitation form, fill in the required information.

   If filling out the form from the View Project level, all bid packages to which you were invited in the project will display. If filling out the form from the View Bid Packages Detail level, then the individual bid package will display.

4. After filling out the form, click the Send button to deliver your response to the owner.

OR From the View Bid Package Details screen, click the Respond button.

View Bid Packages after Invitation Receipt

When subcontractors are invited to bid on a bid package, they must sign into SSO under the same email address to which the invitation was sent or the Bid Management Service will not recognize that they were invited, and will not give them access to view the bid package.

When registering through SSO, make sure you use the same email address as the one to which the invitation was sent.

Submit a Request for Project Information (RFI)

Bidders can submit a Request for Information (RFI) to plan room owners after being invited to a Bid Management Service (BMS) hosted project.

To Submit an RFI

1. From the MHC Network, click the My plan room tab in the main menu.
2. From the Invited Projects screen, click the name of the project for which you want information.
3. From the View Project Details screen, click the checkbox next to the bid package for which you want to request an RFI.
4. Click the RFI button.
5. Select Request for Info from the Subject drop-down menu in the Information Request form.
6. In the Information Request form, type a descriptive message to the plan room owner.
7. When finished, click the Send button to submit the RFI to the plan room owner.

Submit Prequalification Information

Plan room owners may require bidders to be prequalified before being permitted to bid on a hosted project's bid package. If prequalification is required, the Prequalification Requirements form link and instructions for submission, either online or by fax, are included in the Invitation to Bid. Though all prospective bidders may access a public project, if prequalification is required, the bidder will be prompted to submit prequalifications when they attempt to access a bid package. The prompt will include a link to the prequalification requirements form.

NOTE: Bidders must be registered with the McGraw Hill Construction Network (MHC) to bid on projects. You will be prompted to register if you are not already registered for a Network ID when you try to access a public project or a project to which you have been invited.

After submitting the form, once qualified by the plan room owner, the bidder will receive a notification confirming the qualification. Bidders will receive the prequalification requirements form in one of two ways:

If you access a public project, you will be prompted to submit the form when you try to access the bid package online which requires prequalification.
If you are invited to bid on a project that requires prequalification, a link to the prequalification requirements form will be included in the Invitation to Bid as well as a link to the bid package, from which you can submit the form online.

Send Prequalification Information Form

Below is a screen shot of the Send Prequalification Information form:
Additional Field Explanation
Prequalification Requirements
You can download the attached Qualification Instructions document. This document contains a description of the necessary experience you must have to bid on the project as well as instructions for submitting qualifications online using the Send Prequalification Information form.

Attach Qualifications
In this field you will attach a document or file containing your qualifications. Click the Browse button to navigate to, and locate, the file to attach.

Message
You can include a message to the plan room owner when submitting your qualifications.

When you complete the form, click the Send button.

Invitation to Bid with Prequalification
Below is a screen shot of the Invitation to Bid email for a bid that requires prequalification:
Message Type: Invitation to Bid
Subject: Invitation to Bid - FBI Tower - Site Work
From: Amy Deafield
To: Phillip's Builders - Phil Builder
Date Sent: 12/23/2004
Message:

Dear Sub-contractor

You have been invited to bid on the FBI Tower Project but need to be prequalified to bid. The Prequalification Form is attached to this notification.

If you received this by email, follow the instructions below. If you received this by fax, simply follow the instructions on the fax coversheet.

Respond by email:
Step 1: Download the form
Step 2: Complete the form and save to hard drive
Step 3: Click the link to respond and attach the completed form.

You will be notified as to when you can access the bid documents for Site Work. You will be required to register with the McGraw-Hill Construction Network (with the e-mail address the notice was sent to) in order to view the bid documents. If you are a current member, you will be prompted to log in with your user id and password.

Please feel free to contact us with any questions.

FBI Tower
Rancho San Diego Pkwy
Grossmont College Dr
, CA
920201765 USA

GC Bid Date: 12/22/2004 1:00 00 PM
Updated Valuation: $85,700,000
Project Type: Office
Project Key: 94X51

Site Work

GC:
Project Contact: Barbara Medlin
Phone: 800-580-9322 x11
Fax:

Additional Information
MHC Network Registration
You must be registered with the MHC Network using the email address to which the invitation was sent prior to accessing the project.
Send Prequalification Information form
You can submit qualifications by faxing them to the plan room owner or online using the Send Prequalification Information form.

Attached Files: Prequalification.doc
You can download the Send Prequalification Information form from a link provided in the email invitation.
You can download the Send Prequalification Information form from a link provided on the Send Prequalification Information form page.
You can click the bid package link to be prompted to fill out and submit the form online before reviewing the necessary bid package details.

Print
Click the Print button to print the Invitation to Bid.

Reply
You can reply to the Invitation to Bid to let the plan room owner know that you received it and are in process of completing the form.

Respond to a Reminder to Bid
If bidders have not responded to an Invitation to Bid, the plan room owner can elect to send a Reminder to Bid form letter reminding them of the bidding deadline. Upon receipt, bidders can opt to respond to the plan room owner.

Communication in the BMS
Communication is established in the Bid Management Service (BMS) between plan room owners and bidders after a hosted project is set up, bid packages are added, and bidders have been invited or have accessed public projects. Within the BMS, all communications are related to a single bid package within a project.
Initiating communication from owners to bidders occurs through the Notify process.
Communication is via email or fax

All project communication is stored in the bidder's Inbox. Bidders have an individual Status area containing their own Project Inbox and Sent Items box for each project to which they have been invited.
Much of the communication you will receive is automated based on the owner's activity selection (e.g., Notice of Addenda, Notice of Project Change).
Bidders will respond to plan room owner communication via the Respond button or through the Inbox.
NOTE: Once invited to a project, you can send a Request for Information (RFI).
Bidders will receive the following from plan room owners:
Invitation to bid
Qualification notice
Response to request for information
Award notice

• Notifications
  o Change to project notice (bid dates, times, details, etc.)
  o Notice of addenda
  o Bid reminder
  o Project closure notice
  o Correspondence (miscellaneous messages)

Bidders can send the following to owners:
Invitation to bid response
Request for information
Qualifications submission
Replies to notifications from owners
Inbound faxes

Bidder's Inbox
All bidders have an inbox for each project on which they are bidding. Communication between plan room owners and bidders is established by the plan room owner once the bidder has been invited or, in some cases, when bidding is in progress. Contained within the inbox are all inbound messages from the owners sent through the Bid Management Service (BMS).
Bidders will receive the following from plan room owners:
Invitation to bid
Qualification notice
Response to request for information
Award notice

• Notifications
  o Change to project notice (bid dates, times, details, etc.)
  o Notice of addenda
  o Bid reminder
  o Project closure notice
  o Correspondence (miscellaneous messages)

Bidders can send the following to owners:
Invitation to bid response
Request for information
Qualifications submission
Replies to notifications from owners
Inbound faxes

Default Inbox settings are as follows:
• Sorting is by date/time, with the most recent message on top

Bidders can alter sort order by clicking on the column headers
Up to 25 messages display on the initial page

When there are more than 25 messages, bidders can change the default to 50 or 100 messages displayed on one page, ongoing.

To View the Inbox Contents
Bidders access their Inbox when selecting an invited project from the Invited view on the View Projects screen OR

1. From the MHC Network, click the My plan room tab in the main menu.
2. Select a project from the Load projects drop-down menu
3. Click the Go button
4. From the View Project Details screen, click the Status button.
Note: In addition to standard address information, the type of notification received is displayed (e.g., Invitation to Bid, Qualification Notice).

5. From here, you can initiate a new request for information (RFI) to the selected project owner contact, respond to other types of message, print a user-friendly version of the message list, or delete a specific message.

To Delete a Message

1. Click the checkbox next to the message(s) to delete.
2. Click the Delete button.

Note: The message(s) will be removed from the bidder's project Inbox. However, the message(s) will remain in the sender's Sent Items box.

To Respond to Correspondence

1. From the Inbox, click the message to which you want to respond.

NOTE: The type of correspondence is displayed in the Type field.

2. From the displayed message, click the Respond button.

NOTE: You can also print the message.

3. Type a response to the message.

4. Click the Send button.
When the owner responds to the request, the bidder is automatically selected as the recipient by default. However, the owner can opt to send the response to any combination of the participants on the project.

**Bidder's Sent Items**
For each project, bidders can maintain a history of all outbound of all outbound messages sent through the Bid Management Service (BMS) to plan room owners. Each bidder has one Sent Items box per project.
Plan room owners can send bidders the following:
- Invitation to bid
- Qualification notice
- Response to request for information
- Award notice

- **Notifications**
  - Change to project notice (bid dates, times, details, etc.)
  - Notice of addenda
  - Bid reminder
  - Project closure notice
  - Correspondence (miscellaneous messages)

Default Sent Items settings are as follows:

- Sorting is by date/time, with the most recent message on top

You can alter sort order by clicking on the column headers.

Up to 25 messages display on the initial page

When there are more than 25 messages, you can change the default to 50 or 100 messages displayed on one page, ongoing.

To View Sent Items
From the My Projects screen, select a project from the Load Projects drop-down menu.
Click the Go button.
From the View Project Details screen, click the Status button.
Click the Sent Items tab to view communications sent by the bidder.

**NOTE:** The default view is the Inbox.
In addition to standard address information, the type of notification received is displayed (e.g., Invitation to Bid, Qualification Notice).
5. From here, you can initiate a new request for information (RFI) to selected the project owner contact, print a user-friendly version of the message list, or delete a specific message.

To Delete a Message

1. Click the checkbox next to the message(s) to delete.

2. Click the Delete button.

Note: The message(s) will be removed from the owners' Sent Items box. However, the message(s) will remain in the sender's Sent Items box.

Respond to Project Updates and Addenda

When bidders receive messages such as Notice of Addenda or an Update to Project notification, they can, when applicable, respond to the notification.

To Respond to Correspondence

1. From the Inbox, click the message to which you want to respond.

   ![Inbox screenshot]

   **NOTE:** The type of correspondence is displayed in the Type field.

2. From the displayed message, click the Respond button.

   **NOTE:** You can also print the message.

3. Type a response to the message.

4. Click the Send button to submit the message to the plan room owner.
Send a Request for Information

After being invited to a project, bidders an request additional project and bid package information by sending the plan room owners for public projects, and after being invited to a Bid Management Service (BMS) private hosted project, a Request for Information (RFI). This message can be initiated from the bidder’s Inbox after an Invitation to Bid is received. You can also submit an RFI by clicking the RFI button from the View Projects or View Project Details screen.

To Send an RFI

1. From the My Invited Projects screen, click the name of the project for which you would like an RFI.
2. From the View Project Details screen, click the checkbox next to the bid package for which you want to request an RFI.
3. Click the RFI button.
4. Select Request for Info from the Subject drop-down menu in the Information Request form.

In the Information Request form, type a descriptive message to the plan room owner.
When finished, click the Send button to submit the RFI to the plan room owner.

Delete a Message

You can delete any or all messages from your Inbox or Sent Items.
To Delete a Message

1. Click the checkbox next to the message(s) to delete.
2. Click the Delete button.
Note: The message(s) will be removed from the bidder's project Inbox. However, the message(s) will remain in the sender's Sent Items box.

Reporting Overview

There are a number of reports available in the Bid Management Service (BMS) to fulfill bid data reporting requirements. You may filter report results. If no filter is chosen, all data is returned. If filter criteria are chosen, only the data matching the filter is returned. Report results may be re-sorted by clicking on the report column headings.

For example, the Directory Wide Bidding History Report allows you to filter by date range, company CSI codes, subdivisions, location, and company.

From each report results screen, you will be able to print a printer-friendly version of the results, save the report in to your hard drive (HTML file), or email the report (HTML format).

There are two report categories in the BMS:
- Project plan room owner Reports
- Directory Wide Bidding History
- Company Bidding History
- Fax Usage
- Bid Document Activity
- Project Bidding Report
- Adoption Metrics

To access Reporting:

1. Click the My plan room tab from the main menu.
2. Click Reporting from the My Plan Room Links menu
3. Select from available reports on the Manage Reports screen.

Projects Included in Reports
The report feature will extract data from the archive as well as any project being hosted on the McGraw-Hill Construction Network Bid Management Service site. Data from projects in the setup, active and inactive stages will populate reports in conjunction with the data from the archive. Data from deleted projects will not be pulled into reports. All communications, documents and details for deleted projects are lost.

**Directory-Wide Bidding History**

The Directory-Wide Bidding History report enables plan room owners to view the entire bidding history of any, or all, companies listed in their private directory across all projects. **NOTE:** For a single company's complete bidding history, see the topic Company Bidding History.

Filter Fields

- **Company CSI Codes**
  
  Click on a single CSI code or hold the ctrl key and click to select multiple codes. Click the Add button to filter the report results to display data only for the selected CSI codes.

  **NOTE:** To de-select a CSI code after selection, click the code from the field on the right side of the report settings screen and click the Remove button.

Subdivisions

- **Date Range**

  **NOTE:** You can either enter the date as mm/dd/yyyy or click the Calendar drop-down box next to the Date Range fields to select a date from the calendar.

Location / State

After selecting your criteria, click the Run Report button to view the results.

Advanced Filtering

To further narrow the criteria, the Private Directory filtering function is available. Click the Add button to access all filtering capabilities. For details on filtering, see the topic Filtering for Groups.

When filtering for reports, after choosing the advanced filtering criteria, click the Select button to return to the settings screen.
Report Results
Results are organized alphabetically by company, but can be resorted by the column headers once the results display.

**NOTE:** The information displayed in this report is always the most recent at the time the report is run and will only refer to projects still in the plan room.

When finished viewing the results, you have four options:

- **Print**
  Click the Print button to output the report to the assigned printer.

- **Save As**
  The reports will be saved in HTML format as a saved web page.

- **Email**
  The reports will be sent via email in HTML format.

- **Finish**
  Click the Finish button to return to the Directory-Wide Bidding History Report Settings screen.

**Company Bidding History**

The Company Bidding History report enables plan room owners to select one company and view that company’s entire bidding history (for all projects still in the Plan room).

**NOTE:** For multiple companies’ bidding history, see the topic Directory Wide Bidding History.

**Filter Fields**

- **Company** - This is a required field

- **Date Range**
  
  **NOTE:** You can either enter the date as mm/dd/yyyy or click the Calendar drop-down box next to the Date Range fields to select a date from the calendar.

- **CSI Code of bid package**

  Click on a single CSI code or hold the ctrl key and click to select multiple codes.

  Click the Add button to filter the report results to display data only for the selected CSI codes.

  **NOTE:** To de-select a CSI code after selection, click the code from the field on the right side of the report settings screen and click the Remove button.

  After selecting your criteria, click the Run Report button to view the results.
Report Results
Results are organized by invitation date, but can be resorted by the column headers once the results display.

NOTE: The information displayed in this report is always the most recent at the time the report is run and will only refer to projects still in the plan room.

When finished viewing the results, you have four options:
Print
Click the Print button to output the report to the assigned printer.
Save As
The reports will be saved in HTML format as a saved web page.
Email
The reports will be sent via email in HTML format.
Finish
Click the Finish button to return to the Directory-Wide Bidding History Report Settings screen.

Fax Usage
The Fax Usage report enables plan room owners monitor fax activity for their license. They can use this report to compare with their billing statement for fax usage.

Report Results: This report is organized by date. The report can be resorted by any of the columns which are listed below from left to right:
Filter Fields

• Date Range

NOTE: You can either enter the date as mm/dd/yyyy or click the Calendar drop-down box next to the Date Range fields to select a date from the calendar.

• Project
Click on a single project or hold the ctrl key and click to select multiple projects.
Click the Add button to filter the report results to display data only for the selected projects.

NOTE: To de-select a project after selection, click the project from the field on the right side of the report settings screen and click the Remove button.
After selecting your criteria, click the Run Report button to view the results.
Advanced Filtering
To further narrow the criteria, the Private Directory filtering function is available. Click the Add button to access all filtering capabilities. For details on filtering, see the topic Filtering for Groups.

When filtering companies for reports using the Private Directory filtering function, click the Select button displays the report results.

Note: You must select criteria in the Fax Usage Report Settings screen prior to clicking the Add button for advanced filtering to include those criteria.

Report Results
Results are organized by date, but can be resorted by the column headers once the results display.

NOTE: The information displayed in this report is always the most recent at the time the report is run and will only refer to projects still in the plan room.

When finished viewing the results, you have four options:

Print
Click the Print button to output the report to the assigned printer.

Save As
The reports will be saved in HTML format as a saved web page.

Email
The reports will be sent via email in HTML format.

Finish
Click the Finish button to return to the Fax Usage Report Settings screen.

Bid Documents Activity Report
The Bid Document Activity report allows plan room owners to monitor which users have viewed and downloaded bid documents from a project.

Filter Fields

• Select One Project
Select from a drop-down list

• Document Type
Select one document type or select multiple types by holding the ctrl key and clicking each document type for which to display documents in the Bid Documents field. Click the Load Files button to display the associated bid documents.

• Bid Documents (Box under the Document Type field)
Select one document or multiple documents by holding the ctrl key and clicking each document to include in the report. Click the Add button to move the files to the Selected Bid Documents field to display in the results.

• Selected Companies
Click one or multiple check-boxes next to the company contacts whose associated documents you wish to display in the report results. This will create a report that only displays those companies you select. If you select no companies, all will display.

**Date Range**

**NOTE:** You can either enter the date as mm/dd/yyyy or click the Calendar drop-down box next to the Date Range fields to select a date from the calendar.

After entering your criteria, click the Run Report button to view the results.

**Advanced Filtering**
To further narrow the criteria, the Private Directory filtering function is available. Click the Add button to access all filtering capabilities. For details on filtering, see the topic [Filtering for Groups](#).

When filtering for reports, after choosing the advanced filtering criteria, click the Select button to return to the settings screen.

**Report Results**
Results are organized by File Name, but can be resorted by the column headers once the results display.

**NOTE:** The information displayed in this report is always the most recent at the time the report is run and will only refer to projects still in the plan room.

When finished viewing the results, you have four options:

**Print**
Click the Print button to output the report to the assigned printer.

**Save As**
The reports will be saved in HTML format as a saved web page.

**Email**
The reports will be sent via email in HTML format.

**Finish**
Click the Finish button to return to the Bid Documents Activity Report Settings screen.

**Project Bidding Report**
The [Projection Bidding report](#) gives plan room owners a quick snapshot view of all bidders and all bid packages for one project at a time, organized by CSI Code.
Companies may display in the report multiple times because they will be listed for every bid package to which they have been invited, and under that bid package, will be listed for every CSI code the company’s profile matches.

For each bid package, only those CSI codes that are assigned to the bid package should be listed.

For example, if My Bid Package is assigned CSI codes 01, 03, and 06, then only those three CSI codes would be listed under My Bid Package in this report.

Filter Fields
Select One Project - This is a Required field.
Select one project from the Select One Project drop-down menu.
After selecting a project, click the Run Report button to view the results.

Report Results
This report is grouped alphabetically by bid package first, then numerically by each of the CSI codes in the bid package.

NOTE: The information displayed in this report is always the most recent at the time the report is run and will only refer to projects still in the plan room.

When finished viewing the results, you have four options:

Print
Click the Print button to output the report to the assigned printer.

Save As
The reports will be saved in HTML format as a saved web page.

Email
The reports will be sent via email in HTML format.

Finish
Click the Finish button to return to the Project Bidding Report Settings screen.

Adoption Metrics
The Adoption Metrics report allows the plan room owner to track adoption of the Plan room.
Results show basic metrics for all projects with a bid date in the date range specified in the filter. The report is sorted by bid date, but can be resorted by the column headers once the results display.

Filter Field
Date Range of Bid Date

NOTE: You can either enter the date as mm/dd/yyyy or click the Calendar drop-down box next to the Date Range of Bid Date fields to select a date from the calendar.
After selecting your date range, click the Run Report button to view the results.
Report Results
Results are organized alphabetically by project name, but can be resorted by the column headers once the results display.
NOTE: The information displayed in this report is always the most recent at the time the report is run and will only refer to projects still in the plan room.
When finished viewing the results, you have four options:
Print
Click the Print button to output the report to the assigned printer.
Save As
The reports will be saved in HTML format as a saved web page.
Email
The reports will be sent via email in HTML format.
Finish
Click the Finish button to return to the Adoption Metrics Report Settings screen.