An Invitation to bid is a type of notification that general contractors send to their sub-contractors and suppliers to request that they bid on a particular job. Above is an example of an invitation to bid message that a sub contractor would receive in their email inbox from a general contractor. The invitation provides useful information including a brief project description and log-in credentials that allow the sub contractor to enter the general contractors plan room. There is also a Quick Response feature which allows the sub contractor to easily respond to the invitation which is then updated immediately in the general contractor’s plan room. The sub may choose to use this feature or not. Finally there is a link(Click here for more information) that opens the full invitation to bid with additional project information if they want to view the project before responding to the general contractor.
Above is the notification that the sub contractor receives when they utilize the Quick Response feature.

Click on the “Click here to login and view more information” link to open the invitation to bid.
Invitation to Bid

You have been invited to quote on the following project. Please review the plans and specifications via the link below. After reviewing the project information indicate if you intend to submit a bid for this project by selecting the appropriate check box, and then pressing the submit button.

<table>
<thead>
<tr>
<th>PROJECT INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Name:</strong></td>
</tr>
<tr>
<td><strong>Project Number:</strong></td>
</tr>
<tr>
<td><strong>Description:</strong></td>
</tr>
<tr>
<td><strong>Start Date:</strong></td>
</tr>
<tr>
<td><strong>Owner:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BID INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bid Package Name:</strong></td>
</tr>
<tr>
<td><strong>Bid Due Date &amp; Time:</strong></td>
</tr>
<tr>
<td><strong>Bid Instructions:</strong></td>
</tr>
</tbody>
</table>
When the sub contractor clicks on the “Click here for more information link” from either their email invitation or Quick Response notification the full invitation to bid is opened with additional information about the project. Notice that this particular invitation has radio buttons for the sub contractor to provide their response and also drop down boxes to indicate their union and minority status. (Note: the sub may have already used the Quick Response” option noted on the previous screen to indicate their bid status.) Finally there is a “Click Here to View Plans” link that will take the sub contractor to the plan room portal.

Next select “Click Here to View Plans”
The “Portal Login” is where the sub contractor enters their login credentials allowing them to access to the general contractor’s PDM plan room. If they have forgotten their password there is a “Forgot Password” feature that will allow them to recover it. If this is the first time visiting the GC’s plan room then there is also a registration link. Finally for those GC’s that utilize the fax option for sending their invitations there is a “Fax Key” option provided.
If the subcontractor forgets their password and clicks on the “Forgot Password?” option they will be asked to enter their email address and the email credentials will be sent to them via their personal email.
The first time a sub contractor comes to a general contractor's plan room the sub contractor is asked to verify their information. This is done so that the GC has the most up to date information on their contacts.

**Note:** The sub contractor is only required to verify their information one time.
The next step is for the sub contractor to set up a password for their account. They will use this email address and password each time to enter the plan room.
Next the sub contractor can update their current information which will then be provided back to the general contractor.
Before the sub contractor is allowed access into the general contractor’s plan room there will typically be a **EULA** (user license agreement) for the sub contractor to review. Once they agree to the terms and click “Agree” they will be granted access to the plan room.

**Select “Agree” and then “Continue” to proceed to the plan room.**
Upon entering the GC’s plan room the first screen will be the “My PDM Projects” screen. This shows the sub contractor an aggregate of all the projects that they have been invited to by this general contractor. In this screen they have been invited to only one project, Annsett High School. In order to open the project they would click the “View” button located to the right.

Click on View to open the project.
When the project is opened initially they will be on the “Project Details” tab located on the upper left. This tab will show the project name, description and other important information including project contacts and the bid due date.

Click on the “Project Inbox” tab to proceed.
The next tab is the “Project Inbox” tab. The inbox contains all notifications that the sub contractor has received from the general contractor for this job through PDM. Some examples would be invitations to bid (see above), notices of addenda, bid reminders and general correspondence. In order to view the notification the sub contractor clicks the “View” button located to the right of the communication. **Note: Only communications sent through the PDM notifications will be shown under this tab. It is possible to send regular email communications to contacts in PDM but they will not be captured in the Project Inbox.**

Click on “Project Documents” tab to proceed
The next tab is “Project Documents”. This is where all of the plans, specifications, addenda and other project documents are located. In the left pane is the file tree containing all the documents that the sub contractor has access to for this project. Documents are accessed by simply clicking on the folder. In this case the Plans folder in BP31 (Bid Package 31) has been opened. There are several fields that indicate the Item#, Drawing Name, Revision #, Issue Name, etc… of the plan file. From this screen the sub contractor can Download, Print or View the document simply by clicking on the one of the task buttons located on the right. The sub contractor can also select on screen Takeoff or Order Hardcopy options from this screen.
When the sub contractor clicks on the **View** button a .PDF file of the selected file will open. Typical .PDF functions can be performed from this window. It should be noted that this is intended a viewable file. Although it can be printed the resolution will be much lower than when selecting the **Print** option.
The sub contractor is able perform an electronic take-off by selecting a plan file(s) and clicking on the Takeoff button located on the top right. PDM is fully integrated with On Center an industry leader in takeoff tool software. When the “Takeoff” tool is clicked it will launch On Center’s Plan Viewer* where the sub contractor can perform basic takeoff functions including calculating square footage, linear footage and unit counts. Above we have selected the Project Folders file in the left pane and the Takeoff button has been clicked launching On Center (OST). On Center will automatically download all the plan files into the plan viewer.

Note: The first time a sub contractor selects the Takeoff option they will be prompted to install the On Center software on their computer. There is no charge for the plan viewer and the installation time is minimal.
Once the plan files have been transferred into OST plan viewer the sub contractor can perform basic takeoff functions including square foot and linear foot calculation as well as unit counts.

**Note:** A full version of On Center’s takeoff software is available for purchase through On Center and is also fully integrated with PDM. The full version offers many additional features including layering and spreadsheet integration.
When the sub contractor selects the **Order Hardcopy** option from the plan room for selected plan or specification files an ecommerce check out function is launched. In step 1 the sub enters contact information, delivery preference, collateral preference and any additional order information and then selects **Next** to continue the check-out process.
Step 2 allows the sub to review their order and make any changes before submitting. Once finished they click the **Place Order** button.
PDM allows the sub contractor to manage their **Public Information**. Public information includes all information provided by the sub contractor during their initial registration. This allows the sub to manage their own information and reduces data entry and help the general contractor maintain an accurate contact directory.
This area is where the sub contractor can enter the trades that they perform as well as the areas that they are able to service. This data is submitted to the general contractor’s private directory.
The sub contractor can come to the **Private Information** tab at any time they are in the portal to change their password and update their contact preferences.