

Bidding

Choose your own Adventure!

Instructor Setup

1. Create a project and upload any associated bid documents as needed. Options for uploading your bid documents are listed below (pick one):
 - Option 1: (*Best practice*) Upload drawings to the Drawings tool (be sure to review and publish), upload specifications to the Specifications tool (be sure to review), then upload any other documents to the Documents tool into an unlocked folder.
 - Option 2: Upload drawings to the Drawings tool (be sure to review and publish), then upload any other documents to the Documents tool into an unlocked folder.
 - Option 3: Upload all bid documents into the Documents tool into an unlocked folder.
2. Import Students - Each student or group of students must have a unique company name.
3. Create a bid package and invite your student companies to the bid list. Reference support.procore.com for more information about creating a bid package.
4. Encourage students to complete the survey once they have completed the required scenarios. (*QR code to survey included on last page*)

Things to Consider

- All scenarios are web based- to be completed on a desktop/laptop.
- Here are a few options for bid package creation. Determine the best option for your course level and type.
 - Option 1: Create a bid package for a scope of work on the project. Assign individual students to their own company in Procore so they can submit a bid individually. (*Example: All students will submit a bid estimate for Cast-in-Place Concrete*)
 - Option 2: Create a bid package for a complete project. Break students into groups, each with their own company in Procore and assign each group a trade. Challenge student trade groups to bid the project through Procore for any line



items relevant to their trade. *(Example: Group 1- Carpenters, Group 2-Plumbing, Group 3- Mechanical; each group selects the cost codes relevant to their trade and prepares the estimate for each line item.)*

Recommended Student Permissions

No action necessary. Procore will automatically give bid recipients the appropriate level of permission to the company level Planroom tool.

Roles Involved- Optional
Specialty Subcontractor - Project Manager
General Contractor - Project Manager

Scenario | You've Been Invited..

You are the project manager for a specialty contractor company. A general contractor that you have worked with before has landed a new project that your team is excited about! You will receive a bid invitation via email from Procore, their project management software. The bid invitation email will include links to any relevant bid documents. In order for your bid to be considered, you must submit through Procore.

Reference support.procore.com if you get stuck to find support articles that will help walk you through processes in Procore.

Let the Procore.org team know what you thought of this activity. Use a smartphone or tablet to scan the QR Code below. Complete the survey and be entered to win Procore swag!

