

# CONSTRUCTION CONTRACT ANALYST MANAGER

USER MANUAL



REVISED: 07/07/2015

This document is designed to help the **Construction Contract Analyst Manager** use SFBid. If you are not the Construction Contract Analyst Manager, please use the manual associated with your user role in the *Help* section on the SFBid website.

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## LOG IN

- As a city employee, you are already registered with SFBid.
  1. Go to <https://sfbid.sfwater.org>
  2. Click on the blue “log in” icon in the top right corner of the screen.
  3. Log in using your @sfwater.org email address (e.g. sfbid@sfwater.org)
  4. Enter your password
    - Your password is the same password you use to log in to your computer in the morning.

The screenshot displays the SFBid TRAINING 2.2 login interface. At the top left is the SFBid logo and 'TRAINING 2.2' text. The top right corner has a 'Log in' icon. Below the header is a navigation bar with 'Contract List / Login' and a search box labeled 'Search SFBid...'. The central focus is a login form with a blue background and white text. It includes an email field containing 'sfbid@sfwater.org', a password field with masked characters, a 'Stay signed in' checkbox, and a prominent green 'SIGN IN' button. Below the form, there are links for 'Need an account? Register here' and 'Forgot your password?'. The footer of the page contains the text 'Copyright © 2015 San Francisco Public Utilities Commission, All Rights Reserved' and links for 'about | help | contact'.

## REQUEST NEW SFBID ACCOUNT ROLE

- You may need to contact us to be assigned the correct user role in the system.
- Send an email to [sfbid@sfwater.org](mailto:sfbid@sfwater.org) to get set up with the correct user role.
  - Please be sure to have your supervisor’s approval for the role which you are requesting.
- You will receive confirmation that your account has been updated with your role(s).

## VIEW ACTION ITEMS ON MY SFBID PAGE

1. Log in to SFBid (see *Log In* section above for instructions)
2. Your landing page upon log in will be your *My SFBid* (to return to this location at any time, click star icon (My SFBid) in the top right corner of the screen).
  - On the *My SFBid* page, you can review *Action Items* and *My Contracts*
    - The *Action Items* queue includes all tasks which are waiting for you to perform an action.
    - The *My Contracts* queue includes all contracts for which you are the primary Contract Analyst.
3. Click anywhere on the action item row to jump to that action item.

**SFBid TRAINING 2.2**

Welcome Pat! Account My SFBid Log off

Contract List / My SFBid Search SFBid

Start New Contract

### ACTION ITEMS

Action	Number	Title	Days
Review and Approve RFP	PUC.PRO.0017.15	Level Approver 1of2 Approved	01
Write RFP Document	PUC.PRO.0016.15	CD Write Doc	01
Complete RFP Form and Generate/Update RFP Template	PUC.PRO.0015.15	CD Generate Doc	01
Revoke RFP	PUC.PRO.0014.15	CD Revoke	01
Complete RFP Draft	PUC.PRO.0011.15	Draft	01
Write RFP Document	PUC.PRO.0042	Inspection Services for Pipeline	8
Write RFP Document	PUC.PRO.0043	Water Hydration Services for Warriors Parade	7
Review RFP	PUC.PRO.0044	Copy of: Draft	4
Review RFP	PUC.PRO.0046	Kate-01	1

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### MY CONTRACTS

Title	Number	Amount	Status	Visible	Updated
CAN First Review	PUC.PRO.0013.15	\$300,000	_StatusName		06/25/2015 4:47 PM
CMD guideline change	PUC.PRO.0051	\$1,500	Assign Contract Analyst		06/25/2015 4:46 PM
Testing contract instation	PUC.PRO.0036	\$0	Draft		06/25/2015 4:42 PM
quickly	PUC.PRO.0045	\$1,501	Review & Send to City Attorney		06/25/2015 2:54 PM
Copy of: Draft	PUC.PRO.0044	\$300,000	Select Business Approver		06/25/2015 2:28 PM
Kate-01	PUC.PRO.0046	\$1,500	Select Business Approver		06/25/2015 2:28 PM
Technical Services for Pipeline Renewal	PUC.PRO.0041	\$4,600,000	Posted	Yes	06/17/2015 4:22 PM
Water Hydration Services for Warriors Parade	PUC.PRO.0043	\$65,000	Draft Scope & Response Form		06/17/2015 4:07 PM
Inspection Services for Pipeline	PUC.PRO.0042	\$15,000,000	Draft Scope & Response Form		06/17/2015 7:57 AM
SFBid Training with Kate	PUC.PRO.0039	\$1,500,000	Posted	Yes	06/16/2015 1:48 PM

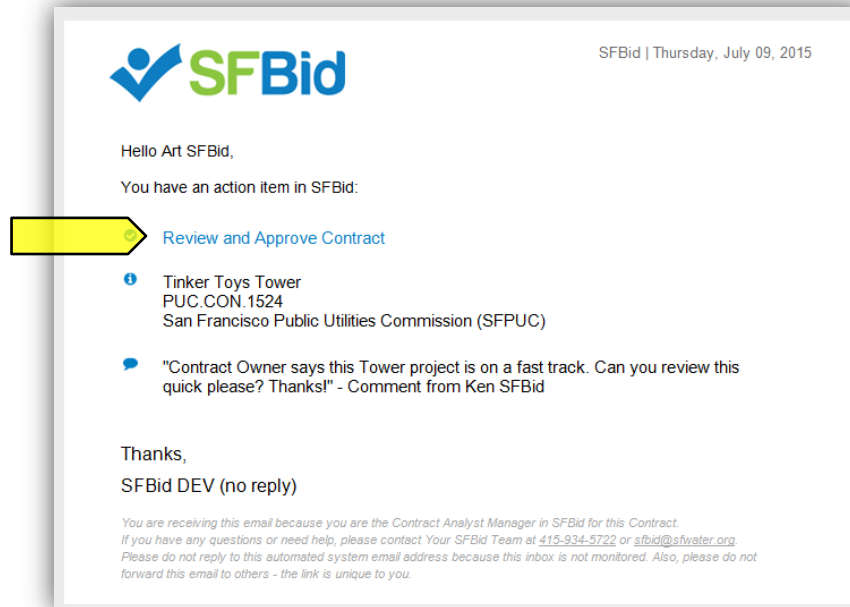
Showing 1 to 10 of 28

Form Templates

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about | help | contact

## ASSIGN CONTRACT ANALYST

- After the Contract Analyst has initiated and submitted a new Contract, you will receive an email from SFBid to “Review and Approve Contract.”
- Click on the blue *Review and Approve Contract* link in the email to jump into SFBid and log in using your email address and password.



- After you log in, you will be redirected to the Contract Web Form.
- Review the information entered by the Contract Analyst and make sure you agree that all of the information in the fields is correct.
  - Click on the top of each blind to expand and see the fields of information.
- Make changes to any information that may be incorrect or send it back for rework if there is something that the Contract Analyst should work on that you are not ready to approve.
- Review any comments made at the bottom of the RFP Web Form.
- Below the Edit line are the actions available to you.
  - Comment
  - Approve to Contract Analyst to Post
  - Return for Rework

## ACTIONS

## COMMENT

- Type in comments and click the blue “Add Comment” button to add comments to the Contract for the Team members and managers to see along the workflow.
- Comments are editable and removable later; however, comments are not private and are viewable by all users in the workflow.

## EDIT

### COMMENTS

Comments

Add Comment

Comments are not required unless sending an item rework. Comments entered here will be included in system emails and comment history will be visible to other users in the "comments" section on this form.

Ken SFBid 07/09/2015 02:06 pm

Contract Owner says this Tower project is on a fast track. Can you review this quick please? Thanks!

## APPROVE TO CONTRACT ANALYST TO POST

- Click the green "Approve to Contract Analyst to Post" button to move the Contract forward in the workflow.

### ACTIONS

Return to Contract Analyst for Rework

All changes saved

Approve to Contract Analyst to Post

- The Contract Analyst will then be able to post the Contract to the Opportunity Page and from there create the Bid Submission Form.

## RETURN FOR REWORK

- Clicking this button returns the RFP back to the previous step for rework by the Contract Analyst.
- If you are returning the RFP, you must include a comment explaining your request for rework.**

### ACTIONS

Return to Contract Analyst for Rework

All changes saved.

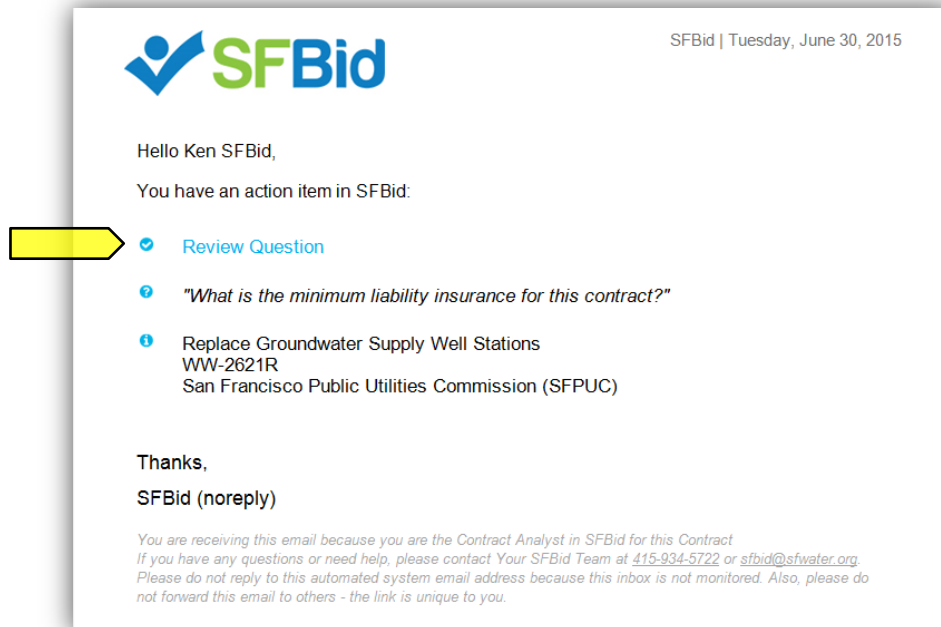
Approve to Contract Analyst to Post

## SAVE

- All Changes are AutoSaved in the RFP Web Form. You will not need to save as you go (outside of the Proposal Response Form).

## REVIEW AND ANSWER QUESTIONS ON BID DOCUMENTS (QBD)

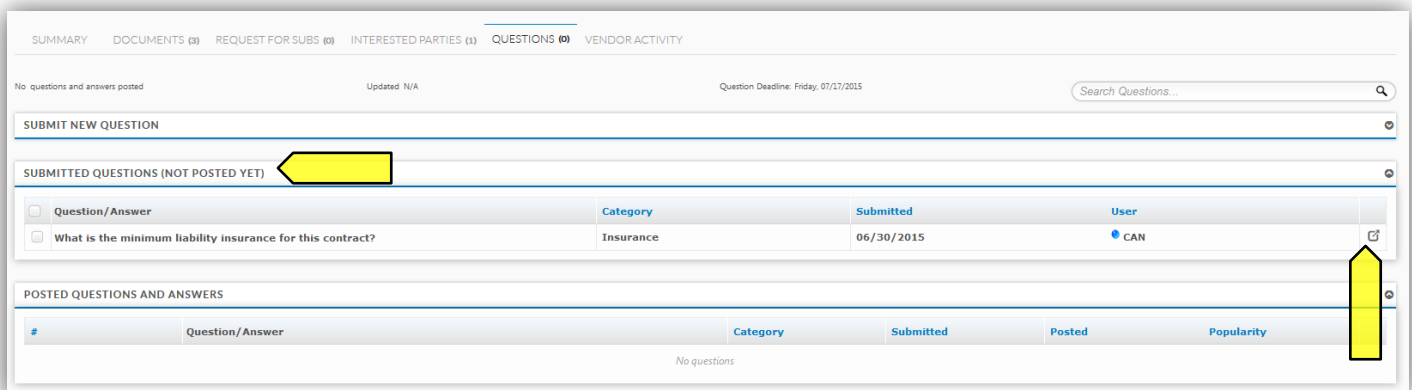
- When a Vendor User submits a question, the Contract Analyst may assign the question to you for an answer. If this happens, you will receive an email notifying you that there is a question on the Contract from a Vendor.
- The email will contain the question and the Contract name and number.
- Click on the blue *Review Question* link to be directed to the question (you will have to log in in order to see the question and respond).



- This link will take you to the *Questions* tab of the Contract Opportunity where you will see a *Submitted Questions (Not Posted Yet)* blind.

## POST QBD

- Click on the details icon to the right side of the table.



- This will bring you to the "Question Details" screen. Here you can
  - Change the Question Category
  - Reformat questions
  - Answer questions
  - Comment on the question for other internal (SFPUC) users to see

- Note for addenda needed
- Post question to Contract Opportunity page for viewing before answering

- Send the question to be answered by another person on the Contract; or
- Email the question to someone outside the workflow who can provide the relative information.

- Click “Save” if you have populated any information which you wish to maintain or are sending the question to another user in the workflow, whether or not the question is being posted to the Contract Opportunity Page.
- To post the answered/reformatted question:
  - Check the box on the left side of the un-posted question
  - Select the “Post” action from the dropdown to the right of the *Submitted Questions* blind.



SUBMITTED QUESTIONS (NOT POSTED YET)				
Question/Answer	Category	Submitted	User	Action
<input checked="" type="checkbox"/> What is the minimum liability insurance for this contract?	Insurance	06/30/2015	CA	-Select an Action- -Select an Action- No Action (Save Only) Assign to City Attorney for answer Assign to CMD Analyst for answer Send to Contract Analyst Manager for Answer Assign to Contract Owner for answer Mark Duplicate Post

- This will move the question from the *Submitted Questions* blind to the *Posted Questions and Answers* blind.

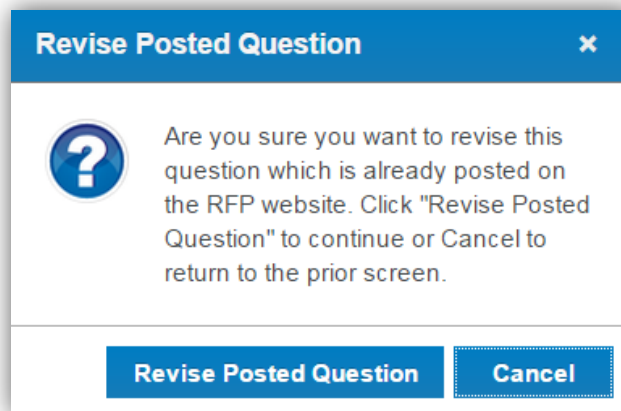
SUBMITTED QUESTIONS (NOT POSTED YET)				
Question/Answer	Category	Submitted	User	
No questions				

POSTED QUESTIONS AND ANSWERS						
#	Question/Answer	Category	Submitted	Posted	Popularity	
1	What is the minimum liability insurance for this contract?	Insurance	06/30/2015	06/30/2015	☆☆☆☆☆	

## REVISIONS TO QBD

- If there are revisions to the posted question
  - Click the Question Details icon to the right of the question.
  - Click the blue Revise Question to the bottom right of the page.
  - A pop-up window will appear.
  - Click the Revise Posted Question to continue.



- Type in the revised answer to the question and click “Save.”
- The revised Q&A will appear in the Submitted Questions blind.
  - Note: the Previous version will remain in the Posted Questions and Answers blind with a note “Currently being revised” (Vendor Users will also see this note).
- Check the box on the left side of the un-posted question.
- Select the “Assign to Contract Analyst Manager” action from the dropdown to the right of the Submitted Questions blind.
- Only the Contract Analyst Manager can post the revised Q&A to the Opportunity page.

- Previous versions of each Q&A can be found by expanding a question and clicking “Previous Revisions”