CONSTRUCTION

CONTRACT ANALYST MANAGER

USER MANUAL

REVISED: 07/07/2015

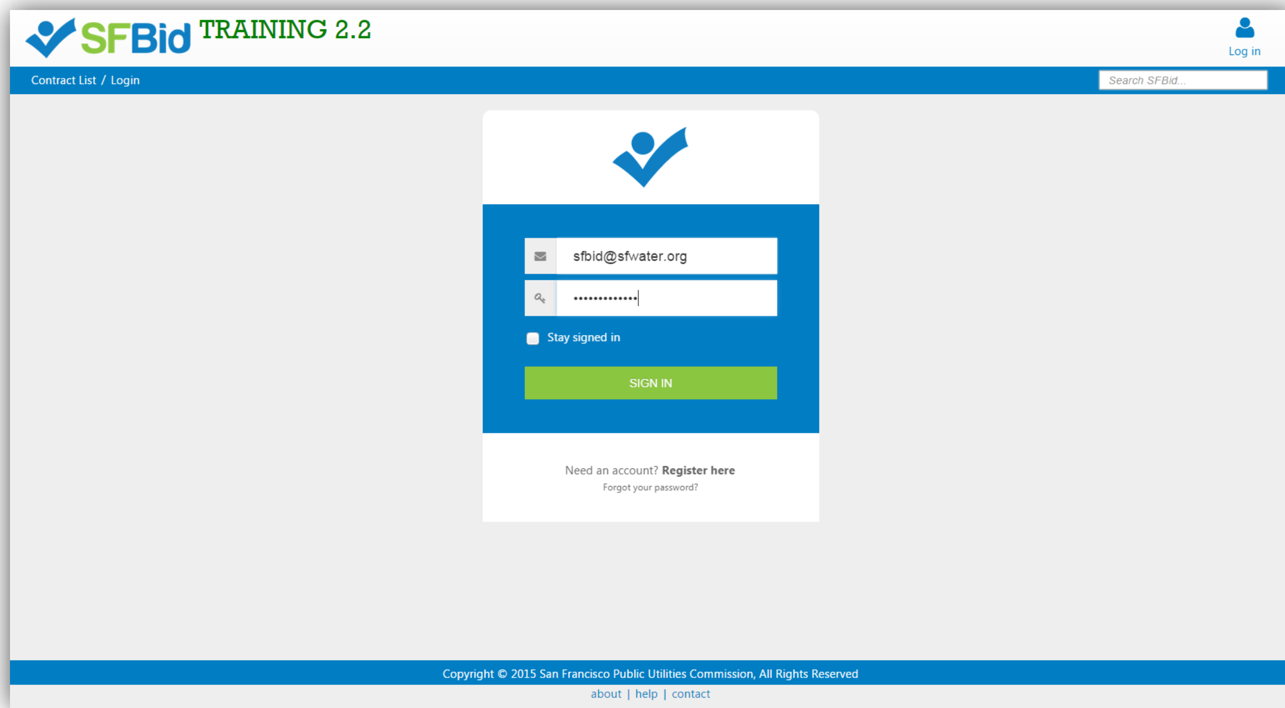
This document is designed to help the **Construction Contract Analyst Manager** use SFBid. If you are not the Construction Contract Analyst Manager, please use the manual associated with your user role in the *Help* section on the SFBid website.

Table of Contents

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.



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 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).

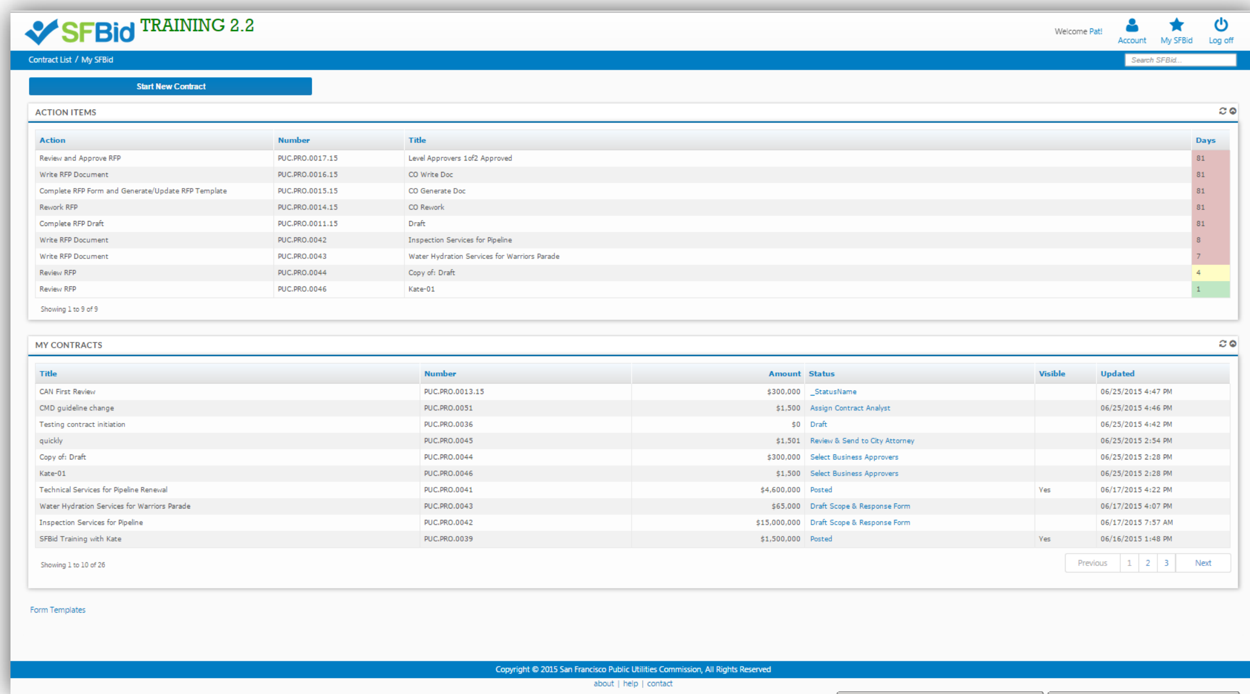
VIEW ACTION ITEMS ON MY SFBID PAGE

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).

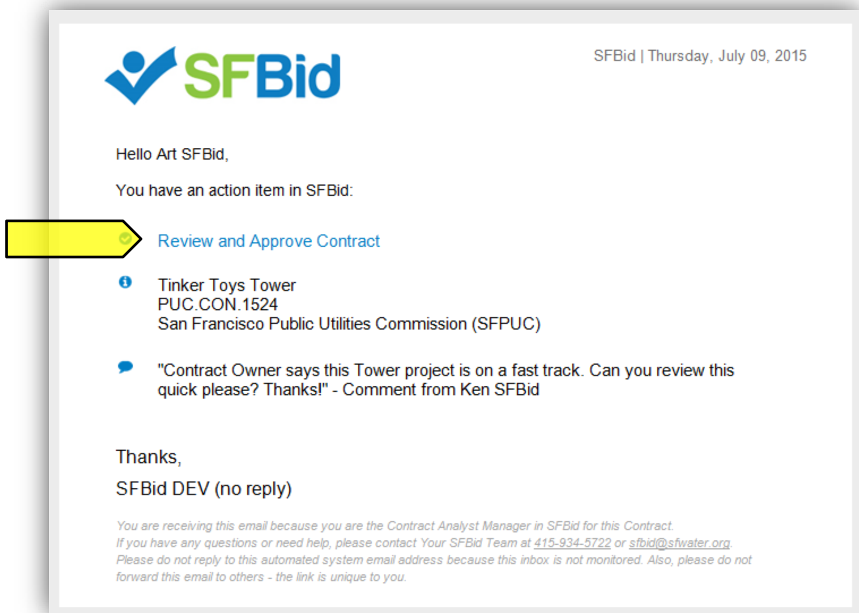
   - On the *My SFBid* page, you can review *Action Items* and *My Contracts*
     - The *Action Items* queue includes all tasks which are waiting for you to perform an action.
     - The *My Contracts* queue includes all contracts for which you are the primary Contract Analyst.

3. Click anywhere on the action item row to jump to that action item.



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.

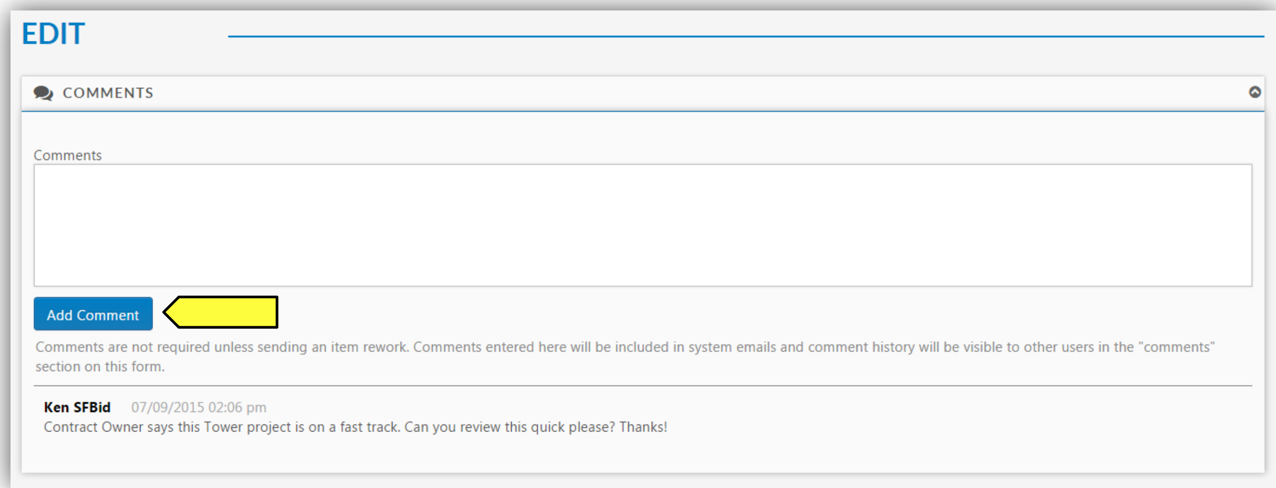


- After you log in, you will be redirected to the Contract Web Form.
- Review the information entered by the Contract Analyst and make sure you agree that all of the information in the fields is correct.
    - Click on the top of each blind to expand and see the fields of information.
- Make changes 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

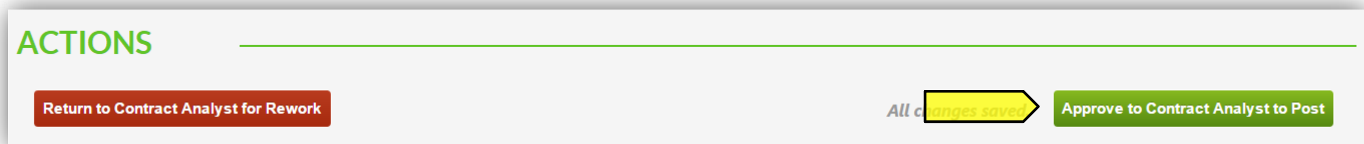
COMMENT

- 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.



APPROVE TO CONTRACT ANALYST TO POST

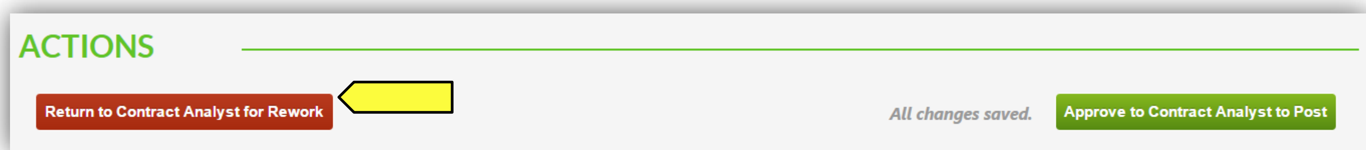
- Click the green "Approve to Contract Analyst to Post" button to move the Contract forward in the workflow.



- 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.**

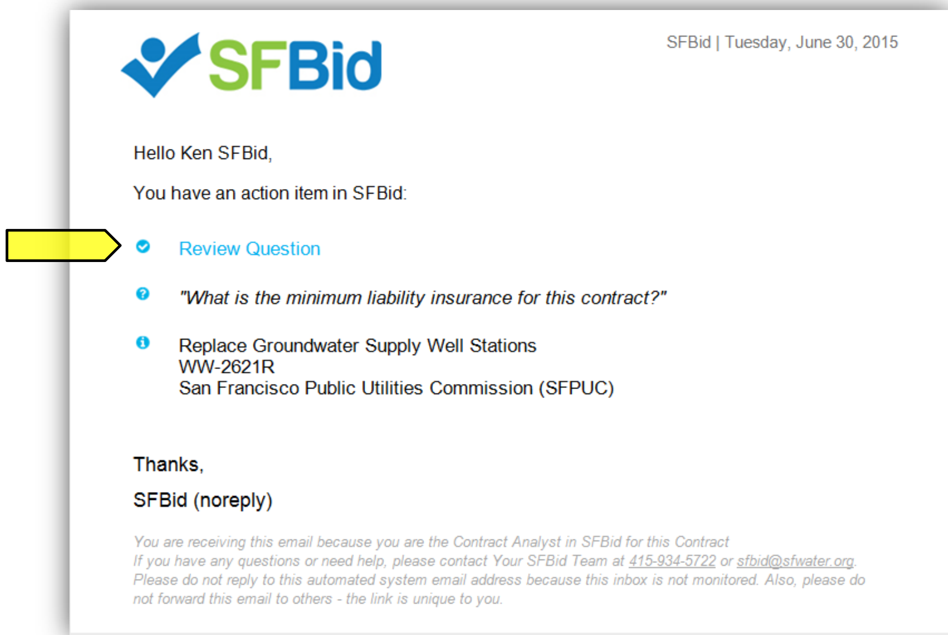


SAVE

- 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)

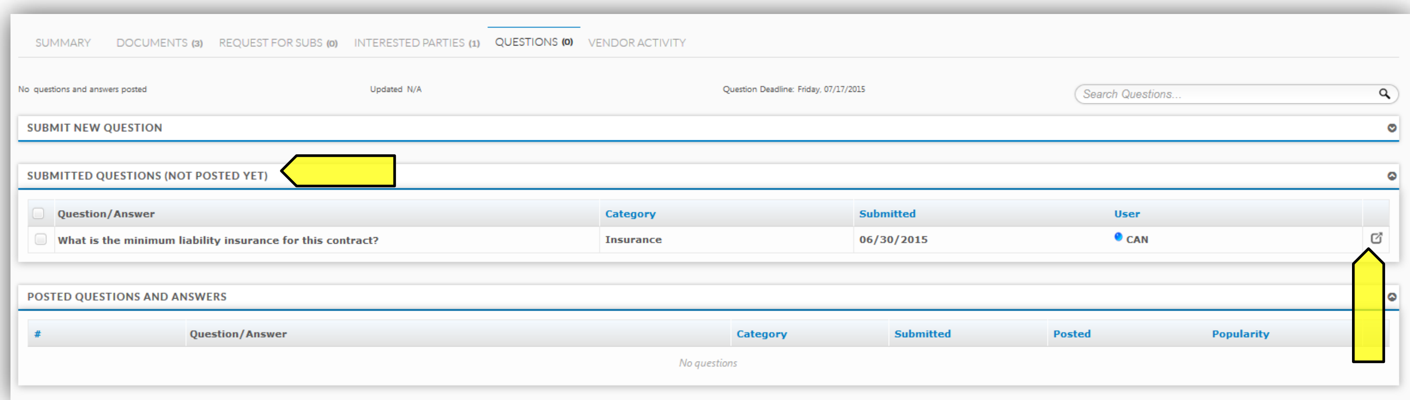
- When a Vendor User submits a question, the Contract Analyst may assign the question to you for an answer. If this happens, you will receive an email notifying you that there is a question on the Contract from a Vendor.
- The email will contain the question and the Contract name and number.
- Click 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.

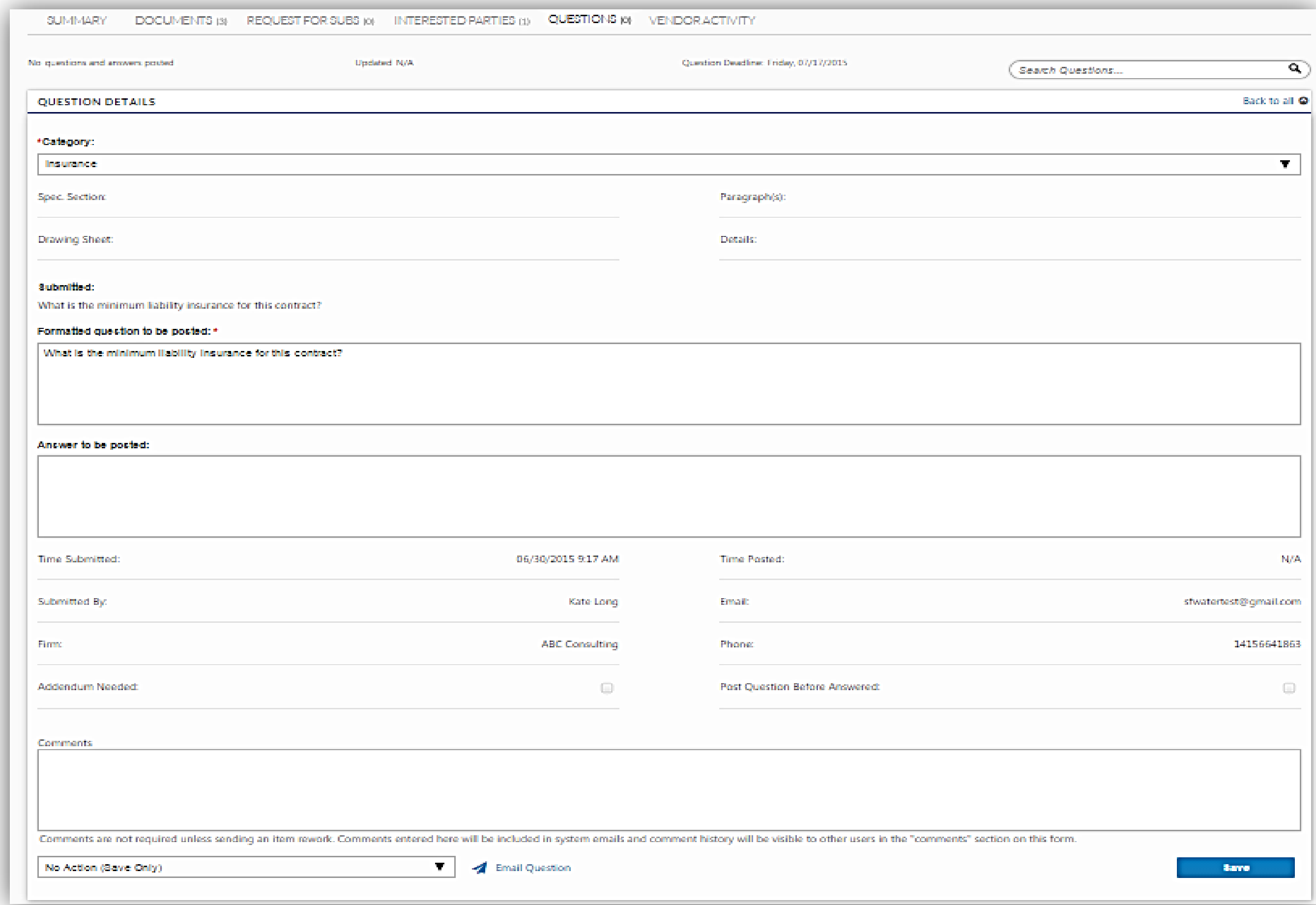
POST QBD

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

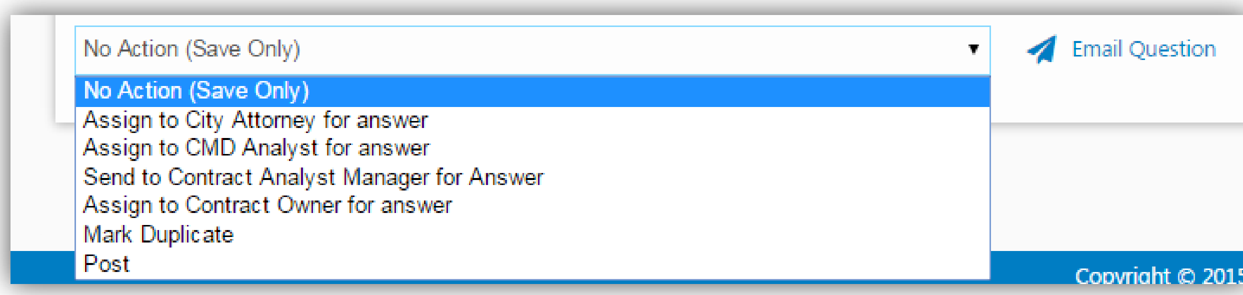


- This will bring you to the "Question Details" screen. Here you can
  - Change the Question Category
  - Reformat questions
  - Answer questions
  - Comment on the question for other internal (SFPUC) users to see

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



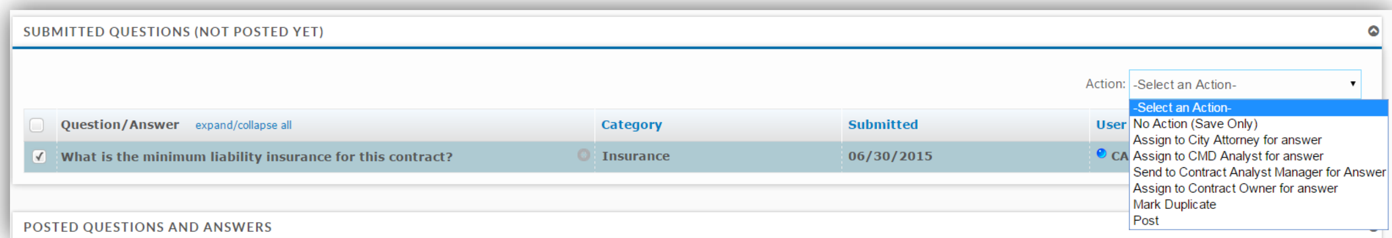
- Send the question to be answered by another person on the Contract; or
- Email the question to someone outside the workflow who can provide the relative information.



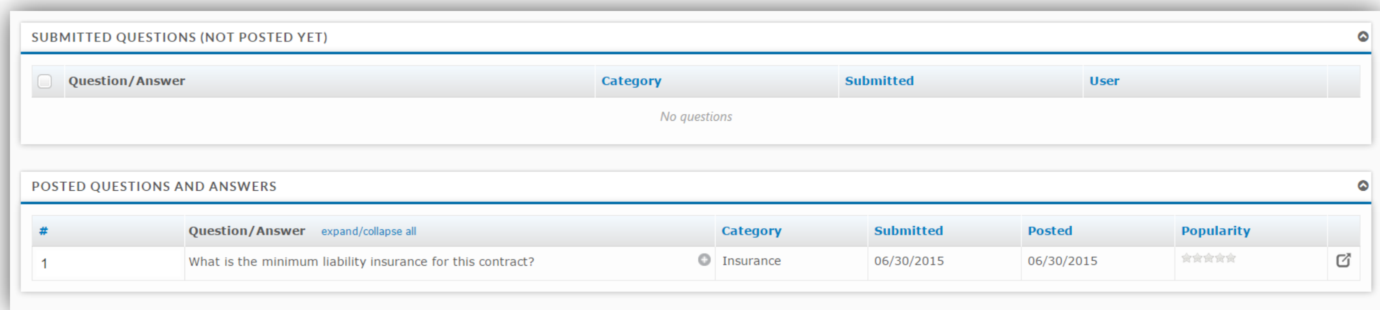
- Click “Save” if you have populated any information which you wish to maintain or are sending the question to another user in the workflow, whether or not the question is being posted to the Contract Opportunity Page.

- 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.

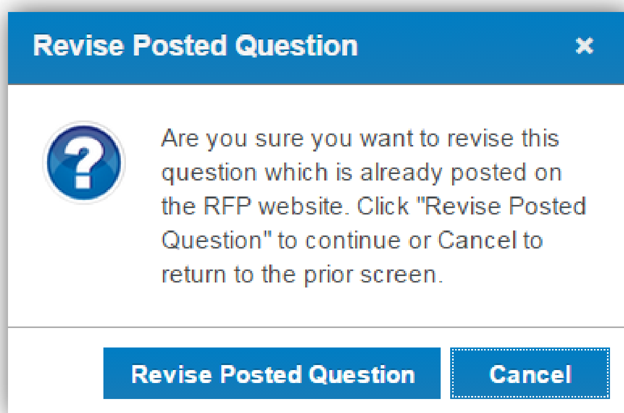


- This will move the question from the *Submitted Questions* blind to the *Posted Questions and Answers* blind.



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”