

PROFESSIONAL SERVICES CITY ATTORNEY MANAGER

USER MANUAL



REVISED: 7/17/2015

This document is designed to help the **City Attorney Manager** use SFBid. If you are not the City Attorney 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.

Contract List / Login

Search SFBid...

SFBid TRAINING 2.2

Log in

sfbid@sfwater.org

Stay signed in

SIGN IN

Need an account? [Register here](#)
Forgot your password?

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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 LANDING 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 have a role in the workflow.
3. Click anywhere on the Action Item row to jump to that Action Item.

The screenshot displays the SFBid TRAINING 2.2 interface. At the top, there is a navigation bar with the SFBid logo, the text 'TRAINING 2.2', and user information including 'Welcome Ron!', 'Account', 'My SFBid', and 'Log off'. Below the navigation bar is a search bar labeled 'Search SFBid...'. The main content area is divided into two sections: 'ACTION ITEMS' and 'MY CONTRACTS'.

The 'ACTION ITEMS' section contains a table with the following data:

Action	Number	Title	Days
Assign City Attorney	PUC.PRO.0016.15	CO Write Doc	94
Assign City Attorney	PUC.PRO.0015.15	CO Generate Doc	94
Assign City Attorney	PUC.PRO.0066	Sidewalk Gardens	1

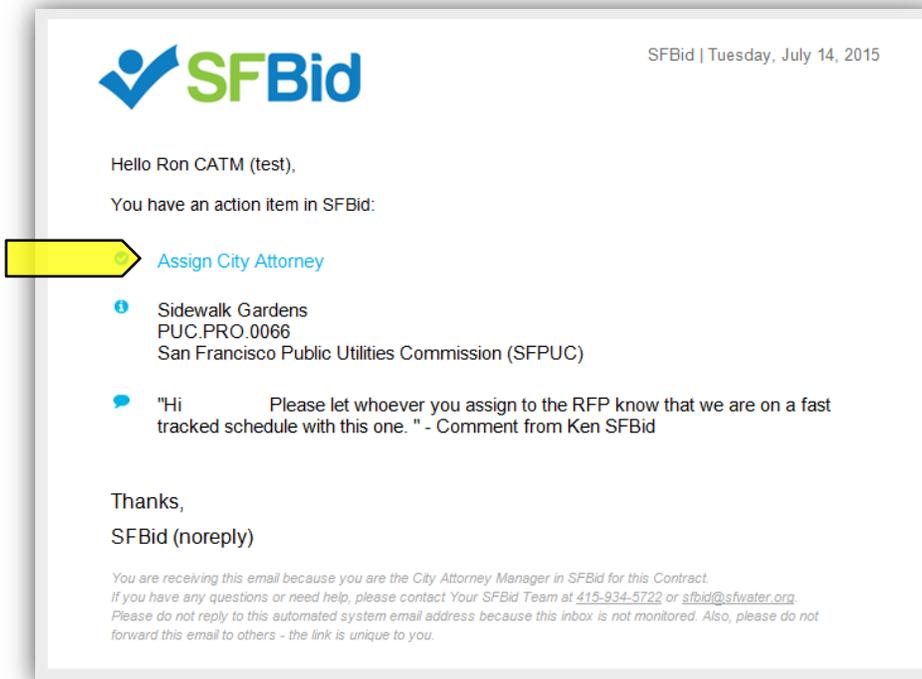
Below the table, it says 'Showing 1 to 3 of 3' and there is a 'Click to open' button. A yellow arrow points to the first row of the table.

The 'MY CONTRACTS' section contains a table with the following data:

Title	Number	Amount	Status	City Attorney
Sidewalk Gardens	PUC.PRO.0066	\$100,005	Assign City Attorney	
Town of Sunol Fire Suppression System	WD-2705	\$6,335,000	Posted	Blake Blackwell
8" Ductile Iron Water Main Installation on Alabama	WD-2712	\$2,040,000	Posted	Blake Blackwell
Site Remediation at 520 John Muir Drive	PUC.CON.0053	\$14,300,000	Posted	Blake Blackwell
San Francisco Groundwater Supply Pipeline	WD-2622	\$1,500,000	Posted	Gus CAT (test)
Moccasin SharePoint Test	PUC.PRO.0065	\$15,000,000	Draft Scope & Response Form	
Build It Bigger	WW-530	\$6,500,000	Posted	Blake Blackwell
Don Pedro Reservoir Crossing 115kV and 230kV Transmission...	HH-960	\$6,000,000	Posted	Blake Blackwell
TRA Watershed Maintenance Project	PUC.PRO.0061	\$150,000	Posted	Gus CAT (test)
Technical Services for Pipeline Renewal	PUC.PRO.0041	\$4,600,000	Posted	Gus CAT (test)

ASSIGN CITY ATTORNEY TO RFP

- After the Contract Owner, Analyst, CMD and Business Approvers have drafted and reviewed the RFP, you will receive an email from SFBid to “Assign City Attorney.”
- Click on the blue *Assign City Attorney* 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 Owner and/or Contract Analyst.
 - Click on the top of each blind to expand and see the fields of information.
- Review any comments made at the bottom of the RFP Web Form.
- Below the *Edit* line are your tasks:
 - Assign User
 - Comment (*optional*)
- Below the *Actions* line is your action:
 - Send to City Attorney for Review

EDIT

- Based on the information that you ascertain from the Summary of Scope of Services, you can determine who to assign for each RFP.

ASSIGN USER

- Click on the “Select User” drop-down in the *Assign User* blind.
 - Begin typing to narrow your search; or
 - Scroll down to the desired user

ASSIGN USER

*Assign City Attorney: -- Select User--

- Click on the desired user or press enter when the name is highlighted in the scroll.

ASSIGN USER

*Assign City Attorney: -- Select User--

Gus CAT (test)

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.

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!

ACTIONS

SEND TO CITY ATTORNEY FOR REVIEW

- Click the green “Send to City Attorney Review” to move the Contract forward in the workflow.

ACTIONS

All Changes Auto 

- The City Attorney you assign to the RFP will be able to enter the CMD Information and review the RFP Document for recommendations and edits/additions as needed.

SAVE

- All Changes are AutoSaved in the RFP Web Form. You will not need to save as you go (other than in the RFP Document Check-In/Out).