

# CONSTRUCTION CONTRACT ANALYST

USER MANUAL



REVISED: 7/17/2015

This document is designed to help **Construction Contract Analysts** use SFBid. If you are not a Construction Contract Analyst, please contact the SFBid Help Desk for the relevant user manual.

# Table of Contents

<b>Log in .....</b>	<b>4</b>
<i>Request new SFBid account role .....</i>	<i>4</i>
<b>View Action Items on My SFBid Page .....</b>	<b>5</b>
<b>Start New Contract.....</b>	<b>6</b>
<b>Complete Contract Web Form and Submit for Review .....</b>	<b>7</b>
<i>Basics.....</i>	<i>8</i>
<i>Labels .....</i>	<i>9</i>
<i>User Info.....</i>	<i>9</i>
<i>Bid Schedule .....</i>	<i>10</i>
<i>Pre-Bid Conference.....</i>	<i>10</i>
<i>Service Types .....</i>	<i>10</i>
<i>LBE Goal .....</i>	<i>11</i>
<i>Comments .....</i>	<i>11</i>
<i>Actions.....</i>	<i>12</i>
<b>Create Contract Opportunity Page .....</b>	<b>13</b>
<b>Configure Contract Opportunity.....</b>	<b>14</b>
<b>Upload Documents to Contract Opportunity.....</b>	<b>15</b>
<b>Create Bid Submission Form.....</b>	<b>16</b>
<i>Sections .....</i>	<i>16</i>
<i>Fields .....</i>	<i>18</i>
<i>Preview.....</i>	<i>20</i>
<i>Save Form.....</i>	<i>20</i>
<i>Return to Opportunity.....</i>	<i>20</i>
<i>Manage Bid Submission Form.....</i>	<i>21</i>
<b>Manage Secure Documents.....</b>	<b>22</b>
Vendor view of secure documents (for Contract ANalyst reference only) .....	23
<b>Make the Contract Opportunity Visible to the Public .....</b>	<b>25</b>
<b>Update Information on the Contract Opportunity.....</b>	<b>26</b>

*Deadline for Bid Submissions* ..... 26

*Updates* ..... 26

*Project Description* ..... 26

*DOcuments*..... 27

**Review and Answer Questions on Bid Documents (QBD) ..... 28**

*Post QBD* ..... 28

*Revisions to QBD* ..... 30

## 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.

SFBid TRAINING 2.2

Contract List / Login Search SFBid

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](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

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

Showing 1 to 9 of 9

### 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 Approvers		06/25/2015 2:28 PM
Kate-01	PUC.PRO.0046	\$1,500	Select Business Approvers		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

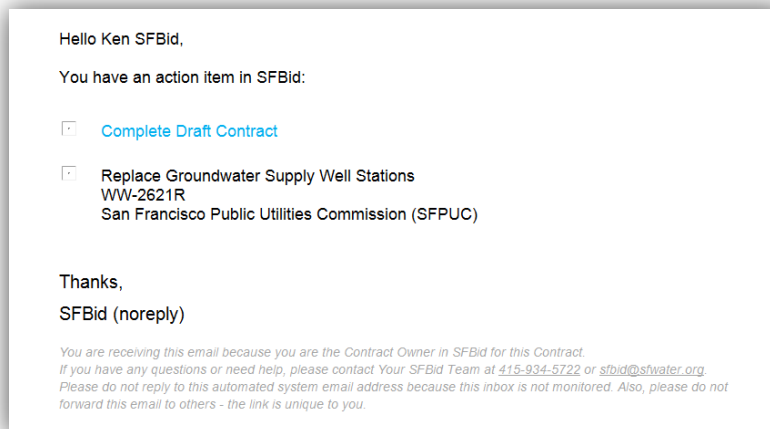
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## START NEW CONTRACT

1. From the *My SFBid* page, click on the blue *Start New Contract* button at the top left of the page.
  - If you don't see this button, it is likely because you do not have the appropriate user role assigned in SFBid. Contact the SFBid help desk to resolve this issue.
2. Enter the following information:
  - Contract Title
  - City Department – SFPUC
  - Contract Type – Construction
  - Optional: Check the box to enter a Contract Number manually
    - If you choose to allow a system generated contract number it will appear as PUC.CON.xxxx
3. Click *Create*.
  - The SFBid spinner will spin while your contract is generated and you will be re-directed to the *Contract Web Form*.

The screenshot shows the SFBid TRAINING 2.2 interface. The top navigation bar includes the SFBid logo, the text 'TRAINING 2.2', and user information: 'Welcome Ken!', 'Account', 'My SFBid', and 'Log off'. Below the navigation bar is a search bar labeled 'Search SFBid'. The main content area features a 'Start New Contract' button. A modal form is open over this button, with yellow arrows pointing to its fields: 'Contract Title' (with the text 'Replace Groundwater Supply Well Stations'), 'City Department' (a dropdown menu showing 'San Francisco Public Utilities Commission (SFPUC)'), 'Contract Type' (a dropdown menu showing 'Construction Services'), and a checkbox for 'Automatically generate the contract number?'. Below the checkbox is a 'Contract Number' input field containing 'WW-2621R' and a green 'Create' button. In the background, a table lists existing contracts with columns for 'Contract ID', 'Title', and 'Days'. The table contains 14 rows of data, with the last row showing 'PUC.PRO.0041' and 'Technical Services for Pipeline Renewal'. A pagination bar at the bottom of the table shows 'Showing 1 to 10 of 14' and navigation buttons for 'Previous', '1', '2', and 'Next'.

- You will also receive an email informing you that your contract has been created.



## COMPLETE CONTRACT WEB FORM AND SUBMIT FOR REVIEW

1. Complete each section of the following blinds of the *Contract Web Form* using the contract information provided by Contract Prep:

- Basics
- Labels
- User Info
- Bid Schedule
- Pre-Bid Conference
- Service Types
- LBE Goal
- (Comments – add your comments as needed)
- Action

The screenshot shows the SFBid TRAINING 2.2 web interface. The top navigation bar includes the SFBid logo, 'TRAINING 2.2', and user options: 'Welcome Ken!', 'Account', 'My SFBid', and 'Log off'. Below the navigation bar, the page title is 'Contract List / WW-2621R' and a search bar is present. The main content area is titled 'Replace Groundwater Supply Well Stations'. It displays contract details: 'City Department: San Francisco Public Utilities Commission (SFPLUC)', 'Contract Type: Construction Services', 'Contract Number: WW-2621R', and 'Contract Links: Link to another RFP/Contract'. An 'EDIT' button is visible. The 'BASICS' section is expanded, showing a form with a red asterisk next to the '\*Total Contract Amount' field, which is currently set to '\$0.00'. There is also an 'N/A' checkbox and a 'Multiple Awards?' checkbox. Below this, the 'Funding Sources' section lists 'City Funding', 'Federal Funding', 'Grant Funding', and 'State Funding', each with an unchecked checkbox. A 'Funding Source Details' section is also present but empty. On the right side, a 'Navigation' menu lists various sections: 'BASICS', 'LABELS', 'USER INFO', 'BID SCHEDULE', 'PRE-BID CONFERENCE', 'SERVICE TYPES', 'LBE GOAL', 'COMMENTS', and 'ACTIONS'.

- Each section can be collapsed and expanded by clicking on the section header.
- Required fields are denoted with a red asterisk (\*)

## Replace Groundwater Supply Well Stations

City Department: San Francisco Public Utilities Commission (SFPUC)  
 Contract Type: Construction Services  
 Contract Number: WW-2021R  
 Contract Links: Link to another RFP/Contract

**EDIT**

- BASICS Copy from existing
- LABELS
- USER INFO
- BID SCHEDULE
- PRE-BID CONFERENCE
- SERVICE TYPES
- LBE GOAL
- COMMENTS

**Navigation**

- BASICS
- LABELS
- USER INFO
- BID SCHEDULE
- PRE-BID CONFERENCE
- SERVICE TYPES
- LBE GOAL
- COMMENTS
- ACTIONS

**ACTIONS**

All changes saved. [Send to Contract Analyst Manager for Assignment](#)



- When you are done completing the *Contract Web Form*, click the green *Send to Contract Analyst Manager for Review* button.
  - After you click the “Send to...” button, the *Contract Analyst Manager* will receive an email from SFBid informing them that they have a task to review and approve this contract.

## BASICS

- Contract Basics include:
  - Total Contract Amount
  - Funding Sources
    - ◇ Funding Source Details
  - Contract Duration
  - Summary of Scope of Services

**BASICS** Copy from existing

\*Total Contract Amount  N/A   
 Multiple Awards?

**Funding Sources:**

City Funding	<input checked="" type="checkbox"/>
Federal Funding	<input checked="" type="checkbox"/>
Grant Funding	<input type="checkbox"/>
State Funding	<input checked="" type="checkbox"/>

**Funding Source Details**

It is necessary as a major hub of commerce for San Francisco to have groundwater supplies well managed in case of an emergency, so the Feds, State and City are giving us \$1,500,000 to fix any wells more than 50 years old.

Contract Duration

**Summary of Scope of Services**  
 The City seeks to retain the services of a qualified Proposer to assist with the following:  
 All groundwater supply well stations more than 50 years old must be replaced with state-of-the-art systems designed to last at least 100 years for the time of installation.



## LABELS

- Contract Basics include:
  - Program Category
  - Select Enterprise(s)/Division(s)
  - Service Type
  - Solicitation Type
  - Administrative Code
  - Operational Type
  - Project Number
  - Community Benefits

The screenshot shows a web form titled "LABELS" with a header instruction: "Please complete as much of this section as possible, but note that not all fields are required. Contract Administration will review and update as required." The form contains the following fields:

- Program Category: WSP
- Select Enterprise(s)/Division(s): Water (dropdown), with buttons for "Local & Regional Water" and "Water Resources Management"
- Service Type: Construction Management, New Construction, Other
- Solicitation Type: Formal
- Administrative Code: Chapter 6
- Operational Type: Design-Build
- Project Number: (empty text box)
- Community Benefits: NO (radio button)

## USER INFO

- Complete the User Info blind to select the users who will be assigned tasks on the Contract through the workflow.
  - Contract Owner Information
    - Name (select to Contract Owner's name by typing in the search box and using the dropdown to locate his/her name.
      - ◇ Selecting the Contract Owner will populate the contact information for that person.
  - Contract Team
    - CMD Analyst
    - City Attorney
  - City Department Information (Information is populated by SFBid, but can be edited as needed)

The screenshot shows a web form titled "USER INFO" with three main sections:

- Contract Owner Information:** Name: Kate Long (KLong@sfwater.org), Phone: 415-934-3923, Email: KLong@sfwater.org. A yellow arrow points to the Name dropdown.
- Contract Team:** \*CMD Analyst: Sue SFBid, \*City Attorney: Gus CAT (test). Two yellow arrows point to the dropdowns.
- City Department Information:** Address Line 1: 525 Golden Gate Ave, Address Line 2: (empty), City: San Francisco, State: CA, Zip Code: 94102.

## BID SCHEDULE

- There are two ways to populate the Bid Schedule
  - Manually enter all the dates and times
  - Click on the blue “Generate suggested schedule” link
    - This will enter dates and times based on a standard timeline determined by the Construction team

The screenshot shows a web interface titled "BID SCHEDULE". At the top, there is a instruction: "Adjust the 'Advertisement of Bid' date and then click the 'Generate suggested schedule' link to start with a default suggested schedule." Below this is a "Generate suggested schedule" button with a refresh icon. A yellow arrow points to this button. Below the button is a table with the following data:

Event	Date	Time	
Advertisement of Bid	06/26/2015	N/A	*
Pre-Bid Conference	07/10/2015	09:00 AM	*
Site Visit	07/10/2015	N/A	
Deadline for Bidders to Submit Questions	07/17/2015	N/A	*
Bid Opening	07/23/2015	02:00 AM	*
Posting of Bid Tabulation	07/31/2015	N/A	

At the bottom of the table is a blue "Add Event" link. A yellow arrow points to this link.

- You can add additional events to the bid schedule by clicking the blue “Add Event.”

## PRE-BID CONFERENCE

- The date and time of the Pre-Bid Conference will be populated by the information you filled in to the Bid Schedule.
- Enter the Location name of the Pre-Bid Conference (i.e. SFPUC, O’Shaughnessy Conference Room, 2<sup>nd</sup> Fl.)
- The Address will be populated by the selection of the Department, but can be adjusted here as needed.

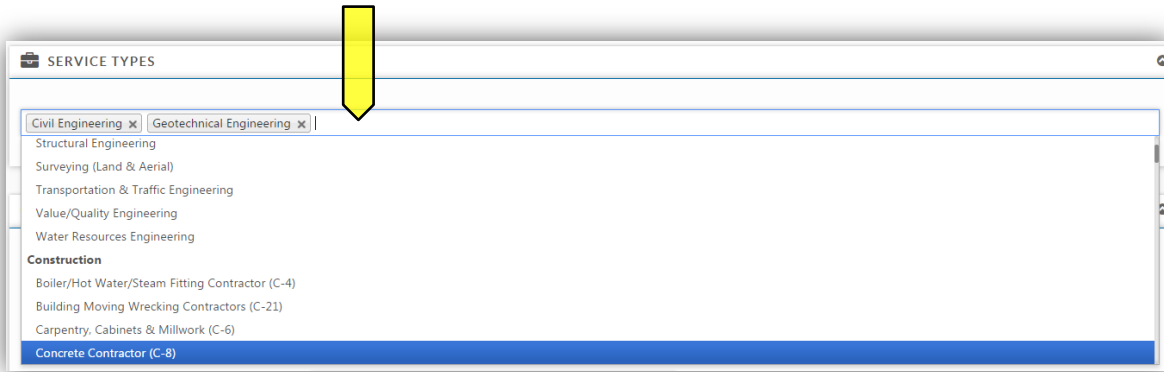
The screenshot shows a form titled "PRE-BID CONFERENCE". The fields are as follows:

- Date (from Schedule): 07/10/2015
- Time: 09:00 AM
- Location Name: O'Shaughnessy Conference Room A, 2nd Floor (highlighted with a yellow arrow)
- Address Line 1: 525 Golden Gate Ave
- Address Line 2: (empty)
- City: San Francisco
- State: CA
- Zip Code: 94102

## SERVICE TYPES

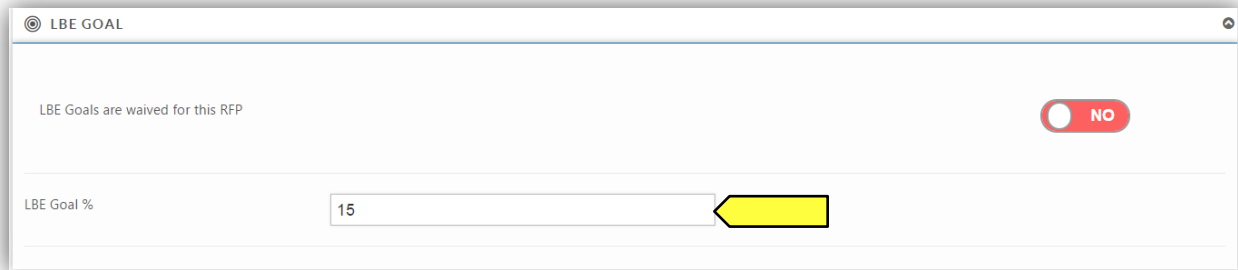
- Enter the types of services that will be required by this contract.
  - Begin typing the service tags or use the drop down to click on and select the types
    - These service types are the service tags that Vendors select upon registration and subsequently when contracts are posted containing these tags, Vendors will receive a notification email that a contract has been posted containing the service tags their business provides.

- Select as many service tags as are applicable to the contract. The more tags selected, the more notifications will be sent out to the relevant Vendors.

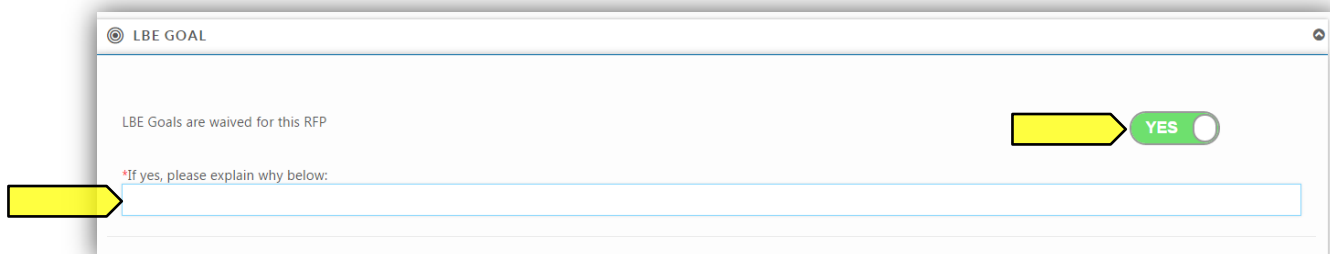


## LBE GOAL

- Enter the LBE Goal determined by CMD.

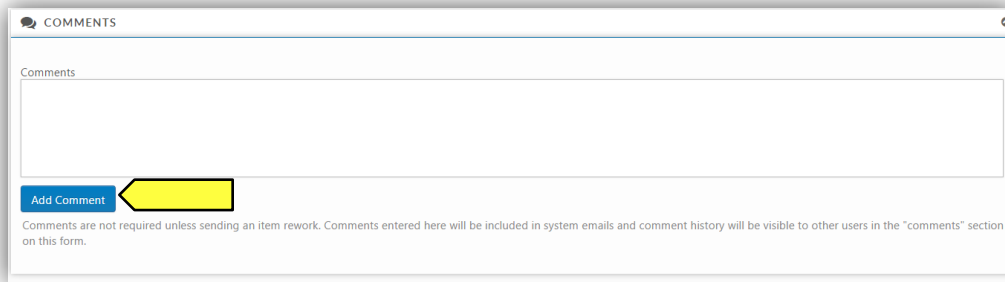


- If the LBE Goal is *Waived*, change the Yes/No switch to Yes”
  - You will need to provide a reason. If the Contract Prep team did not provide a reason, contact the Contract Owner.



## COMMENTS

- 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

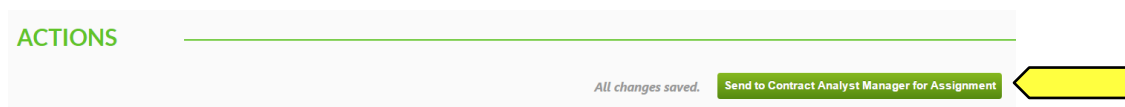
Comments

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.

## ACTIONS

- When you have entered all applicable information relating to the contract, click the green "Send to Contract Analyst Manager for Review" button



ACTIONS

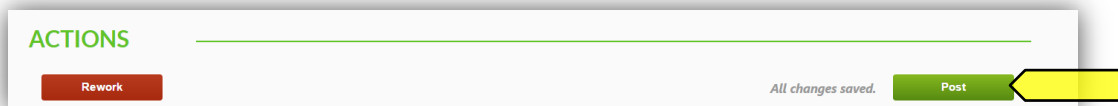
All changes saved.

Send to Contract Analyst Manager for Assignment

- After the Contract Analyst Manager has reviewed and approved your Contract Web Form, you will receive an email from SFBid informing you that it is time to post your contract.



1. Use the link in this email or the link from your *My SFBid* page to jump to the *Contract Web Form*.
2. Click the green *Post* button to create this contract opportunity page on the website.
  - After you click the *Post* button, the *Contract Opportunity* is created, but is not yet visible to the public.



- If there are changes that need to be made to the RFP, click the red "Rework" button and you will re-enter the workflow at the contract initiation stage. Once you have completed the Rework, your manager will once again approve it before you are able to post the RFP.

## CONFIGURE CONTRACT OPPORTUNITY

- After clicking *Post* from the *Contract Web Form*, you will be redirected to the *Contract Opportunity*.

1. On this page, you can change the *Deadline for Bids* time using the time picker in the top right corner of the screen.

Deadline for Bids		07/23/15	02:00 PM						
		Hour	Minute						
AM	12	01	02	03	04	05	00	05	10
	06	07	08	09	10	11	15	20	25
PM	12	01	02	03	04	05	30	35	40
	06	07	08	09	10	11	45	50	55

2. Review the bid information to make sure that everything looks correct.

- If need be, you can update the *Project Description* with details about the project.

Contract List / WW-2621R

Welcome Kent Account My SFBid Log off

Replace Groundwater Supply Well Stations (WW-2621R)

Create Bid Submission Form Deadline for Bids 07/23/15 02:00 PM

SUMMARY DOCUMENTS (0) REQUEST FOR SUBS (0) INTERESTED PARTIES (0) QUESTIONS (0) VENDOR ACTIVITY

**Project Description**

All groundwater supply well stations more than 50 years old must be replaced with state-of-the-art systems designed to last at least 100 years for the time of installation.

Update Description

**Updates**

No Updates

Add Update

**Service Tags:**

Civil Engineering Geotechnical Engineering

**Bid Details**

Contract Type	Construction Services
City Department	San Francisco Public Utilities Commission (SFPUC)
Division(s)	Water
Estimated Cost	\$1,500,001
Due Date	7/23/2015
Due Time	2:00 PM
Contract Duration	2 Years
Advertisement Date	N/A
LBE Goal	15%

**Pre-Bid Conference**

Date	7/10/2015
Time	9:00 AM
Attendance	Not Mandatory
Location	O'Shaughnessy Conference Room A, 2nd Floor 525 Golden Gate Ave, San Francisco, 94102

Visible on Website? NO

View Contract Form

RSVPs for Pre-Bid Conference: 0

## UPLOAD DOCUMENTS TO CONTRACT OPPORTUNITY

1. From the *Contract Opportunity*, click on the *Documents* tab.
  - On this tab, you can see two sections: *Existing* and *New*

Contract List / WW-2621R

Replace Groundwater Supply Well Stations (WW-2621R)

Create Bid Submission Form

Deadline for Bids 07/23/15 02:00 PM

SUMMARY DOCUMENTS REQUEST FOR SUBS INTERESTED PARTIES QUESTIONS VENDOR ACTIVITY

EXISTING

#	Date	Name	Security
No results found			

NEW

#	Name	Replaces	Security	Action
No documents have been added				

Add the first Document

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2. Click the “*Add the first Document*” link in the *New* blind to browse on your computer to select the file(s) you want to upload. When you are ready, click the green *Upload Documents to Website* button.
  - You can upload more than one document at once.
  - You can edit the name of the file using the *Name* column.
  - You can replace existing documents on the website with a newer version. When you are uploading the new version, select the old version in the *Replaces* column.
  - You can mark a document as security-sensitive by clicking on the padlock icon in the *Security* column. See [Manage Secure Documents](#) section below.
  - You can remove a document from the website before it has been downloaded by clicking on the (x) icon next to the document name. If a document has already been downloaded, it cannot be removed from the site and the (x) icon will disappear.
  - You can reorder documents in the *Existing* section by changing the index value in the *#* column or dragging and dropping the entire row.

NEW

#	Name	Replaces	Security	Action
1	Browse			

Add Document

Cancel Upload Documents to Website

## CREATE BID SUBMISSION FORM

- To create a new bid submission form, click the green “Create Bid Submission Form” button located on the top left of the Contract Opportunity.
  - Check the box to begin with a blank template or to use an existing system template.
  - Click the green “Create” button to generate the form builder.

Replace Groundwater Supply Well Stations (WW-2621R) ★

**Create Bid Submission Form** Deadline for Bids: 07/23/15 02:00 PM

Start with a proposal form template  
- Select Template -  
 Start with a blank proposal form template

**Cancel** **Create**

**Bid Details**

Contract Type	Construction Services
City Department	San Francisco Public Utilities Commission (SFPUC)
Division(s)	Water
Estimated Cost	\$1,500,001
Due Date	7/23/2015
Due Time	2:00 PM
Contract Duration	2 Years
Advertisement Date	N/A
LBE Goal	15%

**Pre-Bid Conference**

Date	7/10/2015
Time	9:00 AM
Attendance	Not Mandatory
Location	O'Shaughnessy Conference Room A, 2nd Floor 525 Golden Gate Ave, San Francisco, 94102

Visible on Website? **NO** 0 RSVPs for Pre-Bid Conference: 0

[View Contract Form](#)

## SECTIONS

- Blinds in the Form Builder are called “Sections”
- Click the blue “Add the first section” link on the left to open the first section.

Replace Groundwater Supply Well Stations

Proposal Response Form Builder  
Construction Services Proposal Form

**Add the first section**

**Return To Opportunity** **Preview** **Save Form**

**Form Fields**

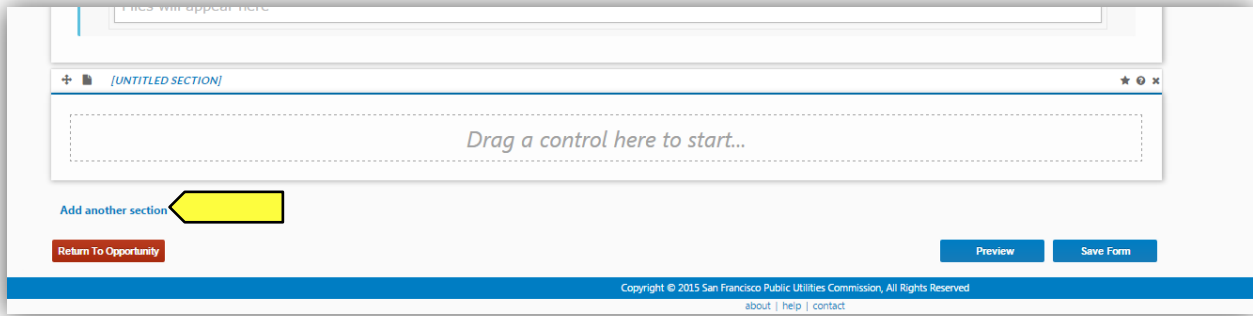
Drag and drop fields onto the form on the left:

- Instructions
- Text Line
- Text Area
- Text Formatted
- Checkbox
- Multiple Choice
- Date Picker
- Dropdown Options
- File Attachment(s)
- Yes/No Switch
- Custom Table

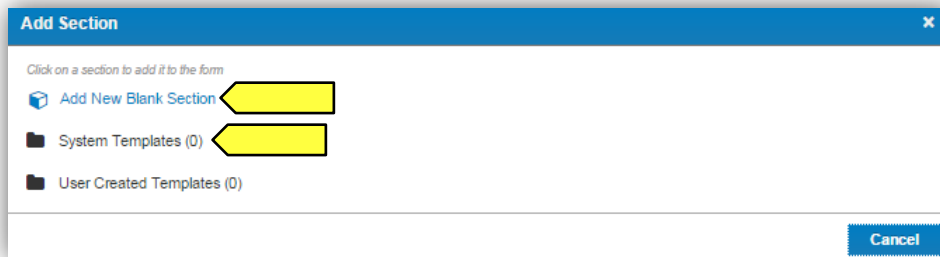
Show Custom Controls

- Click the blue “Add another section” at the bottom of the page to add additional sections.

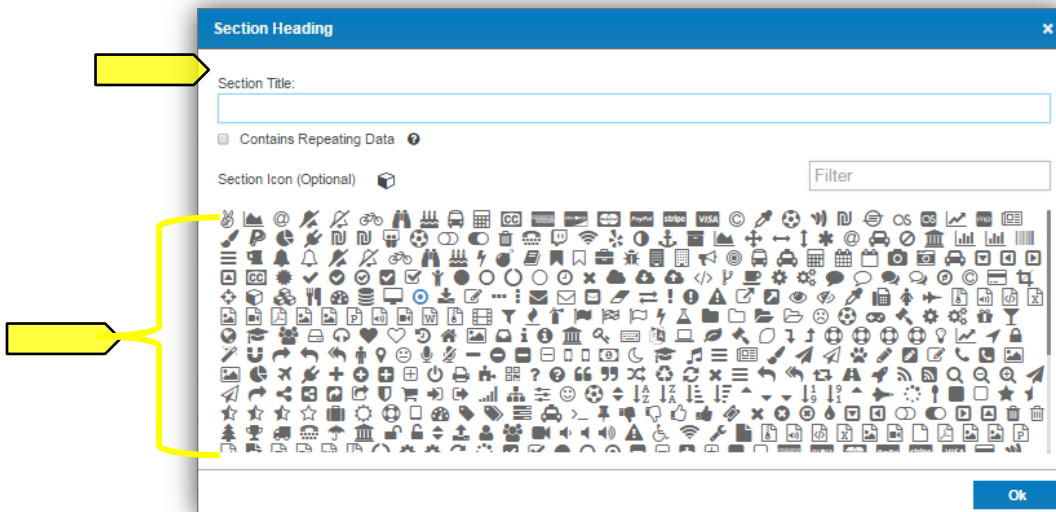





- When you add a new section, you will be prompted to click the pertinent link for:
  - Add New Blank Section
  - System Templates
  - User created Templates
    - Note the blue options are what are available to you; if they appear gray, then there are no available templates in your profile.
    - The numeral to the right of the options indicates the number of templates available to you.

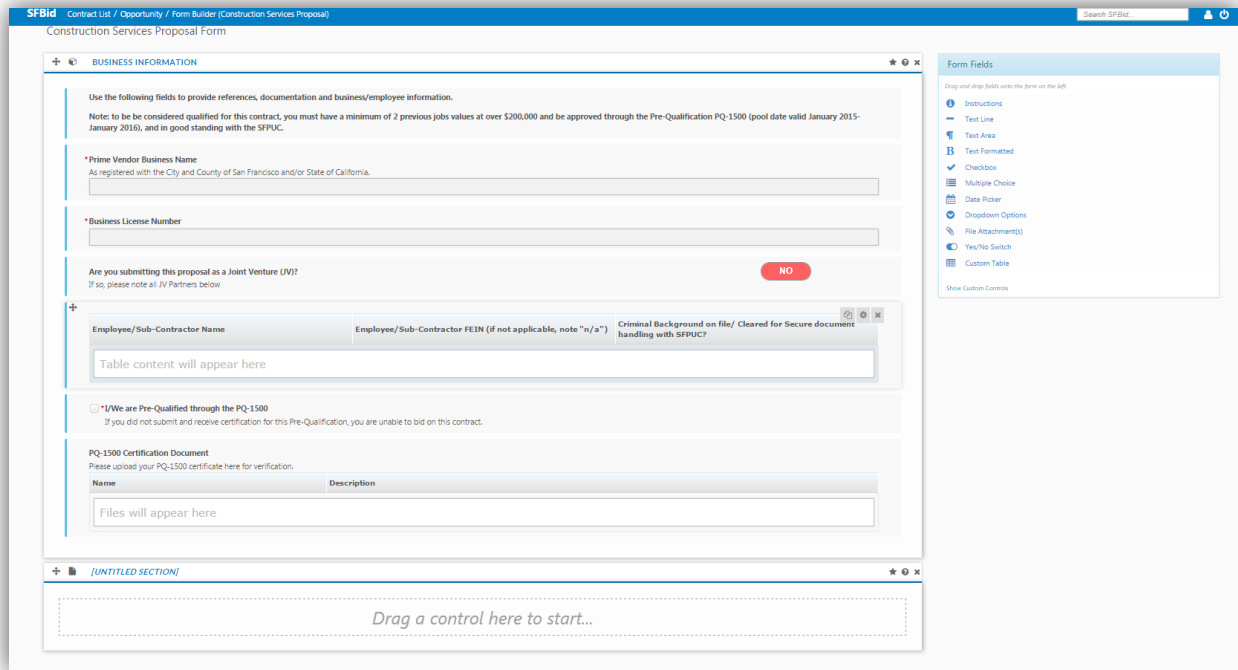


- Type in the name of this section into the “Section Title” field.
- Select an icon to represent this field (optional; the default icon is a cube).
- Click the blue “OK” button located in the lower right of the window.

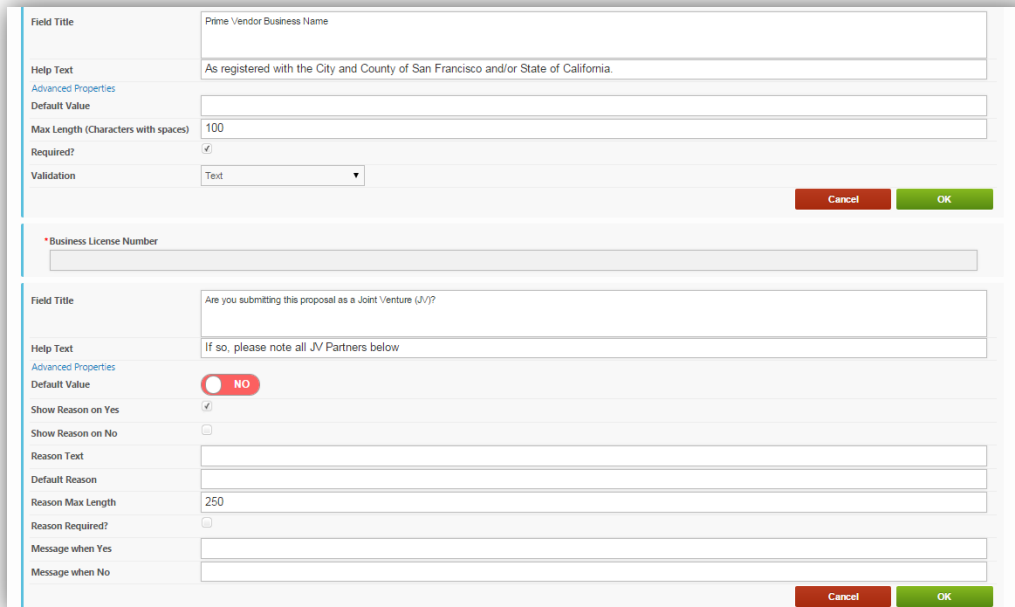



- Sections can be dragged up and down by clicking and holding the navigation icon  at the top left of each blind.





- All fields have a line for *help text* along with the field title/question.
  - With the exception of the Instructions field, since there is no response box to this field directly.
  - Use help text to clarify questions, how questions should be answered, etc.
- For Advanced Options, each field type has its own categories including, but not limited to:
  - Required (will be indicated with a red asterisk **\***)
  - Minimum/Maximum length
  - Validation
    - Email
    - Phone
    - Dollar Amount
    - Default Value



- Each time you are finished creating a field, click the green “OK” button to collapse the options and format the data.
- If you do not wish to save the information you have populated, simply click the red “Cancel” button.
  - This will return the field to the most recent version of the information you have populated within the particular field.
- To remove a field that you have added, click the green “OK” button, then mouse over the top right of the field and click on the gray “x” to remove.
  - A pop-up window ensuring that you wish to do this action will appear.
  - Click “OK” if you wish to continue with the removal of the field.
- To edit a field after it has been collapsed to the formatted version, mouse over the top right of the field, and click on the cog icon  to open for editing. You will need to expand the Advanced Options again if there are changes that need to be made beyond the basics of the field.

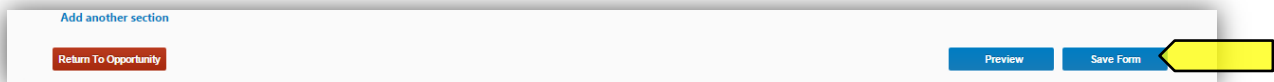
## PREVIEW

- To preview the form, first click the blue “Save Form” (1) button, then “Preview” (2).
  - The “Preview” option allows you to see and test out the form as the Vendors would see it.
  - This will help you see where you have missed “required” options, have typos and need to add help text.



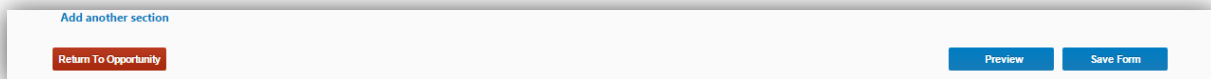
## SAVE FORM

- **As you build the form, be sure to click the “Save” as you go to record the entry/entries or change(s) made. If you need to go back to the opportunity page, log out or wish to preview your form, click save before leaving the form builder page, and again when you have made any reasonable quantity of entries or corrections.**



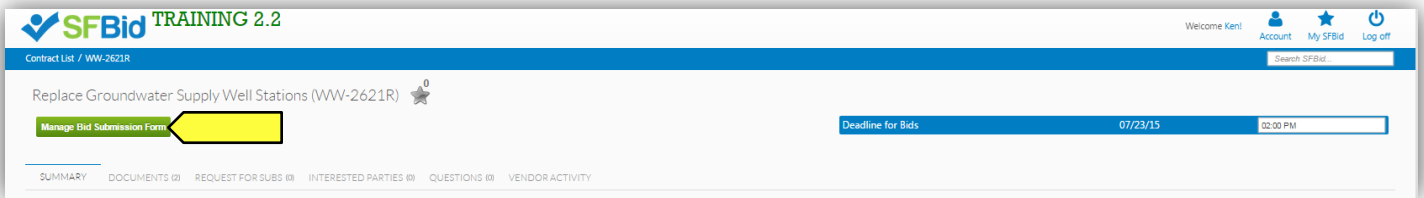
## RETURN TO OPPORTUNITY

- To return to the Contract Opportunity landing page, click the red “Return to Opportunity” button on the bottom left of the form builder page.
  - Remember to click the “Save Form” button before leaving the page.



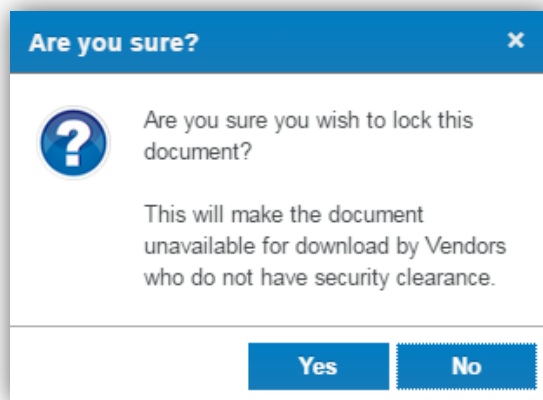
# MANAGE BID SUBMISSION FORM

- To continue work on the submission form with form builder, click the green button at the top of the Contract Opportunity landing page.

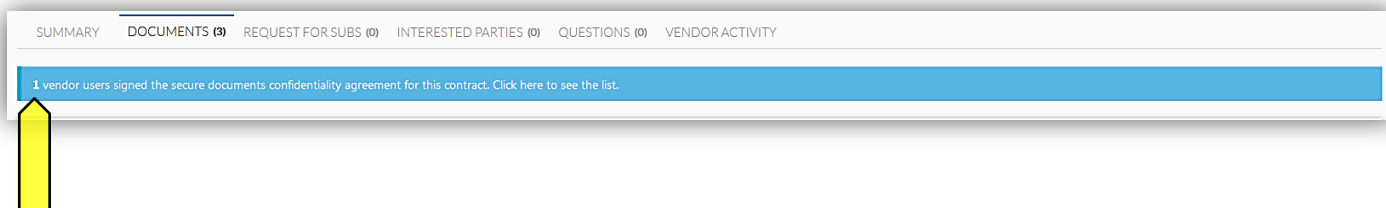


## MANAGE SECURE DOCUMENTS

1. You can mark a document as security-sensitive by clicking on the padlock icon in the *Security* column. Marking the document as secure will give you a pop-up warning and will make the document unavailable for download by Vendors who do not have security clearance.
  - After a document is marked as secure, the padlock icon next to the document will appear locked.
  - In order for Vendor users to download secure documents, they have to go through extra levels of approval:
    - i. Vendor users must be marked as “trusted” by the SFBid site administrator after a verification process administered by the construction team. This “trusted” status is valid across the entire SFBid system.
    - ii. Vendor users must electronically sign the secure documents confidentiality agreement for the specific contract in question. This confidentiality agreement is valid only for the specific contract in question.



2. After the *Contract Opportunity* is made visible to the public, you will see a blue bar at the top of the *Documents* tab which lists the number of users who have signed the confidentiality agreement for this contract. Click on the blue bar to see the list of users who have signed the confidentiality agreement.
  - Note: if there are not any locked documents uploaded to the opportunity, then the blue security bar will not appear.
  - Vendor users who have downloaded secure documents are also required to report distribution of these documents to subcontractors or suppliers. You can view a list of the parties to whom the secure document has been distributed by clicking on the Vendor User’s name in the *Secure Bid Documents* pop-up window.



- Clicking on this blue banner will show you a list of Vendor Users who have “signed” the *Confidentiality agreement for Contract Secure Documents*, when they signed it and with whom it has been shared.

Secure Bid Document Users					
Name	Vendor	License #	Date	Section	Shared
Kate Long	ABC Consulting		06/29/2015	All	0

**OK**

## VENDOR VIEW OF SECURE DOCUMENTS (FOR CONTRACT ANALYST REFERENCE ONLY)

- Vendor Users will see a red bar along the top of the *Documents* tab informing them that they must sign the confidentiality document in order to view the secure documents attached to the Opportunity.

SUMMARY DOCUMENTS (3) REQUEST FOR SUBS (0) INTERESTED PARTIES (0) QUESTIONS (0)

You must agree to the secure documents [Confidentiality Agreement](#) for this contract before you can download secure documents.

#	Date	Name	Security
1	06/29/2015	c	
2	06/29/2015	Construction RFP Document - Secure	
3	06/29/2015	Contract for Well Replacement Insurance documents	

Showing 1 to 3 of 3

- Once a vendor clicks on the link in the red bar, they will see an agreement window appear which will be a legally binding agreement to which they will check a box and populate their business license number to proceed.

**Confidentiality agreement for Contract Secure Documents**

Please read and agree to the following conditions by checking the checkbox below.

The City and County of San Francisco Public Utilities Commission (SFPUC) (CITY) agrees to furnish DOCUMENT RECIPIENT with certain confidential information pertaining to City-owned facilities as described below: Replace Groundwater Supply Well Stations The release of confidential documents (including all plans and specifications and archived documents, in both hard copy and electronic form) is subject to the following mutually-agreed upon terms and conditions: 1. DOCUMENT RECIPIENT agrees to hold the above-described confidential information in trust and confidence and agrees that it shall be used only for improvements to City facilities and shall not be used for any other purpose or be disclosed to any third party. 2. By accepting and using the above-described confidential information, DOCUMENT RECIPIENT expressly agrees to treat such documents in strict confidence. 3. To receive confidential documents on behalf of a potential bidder, an individual must provide to the CITY the executed original of this Agreement. A copy faxed or otherwise will not suffice. A business card and the Contractor/Business license number must accompany the agreement. In addition, the individual receiving the documents must provide a valid United States of America (US) State driver's license or other form of US and/or State Official picture identification card. 4. Copies, reproductions, or alterations in any form, including but not limited to paper copies and electronically-formatted copies of complete and/or any portions of DOCUMENTS, shall not be made or retained for distribution to any person or entity by the DOCUMENT RECIPIENT. Exceptions: a) A Prime Contractor may provide sections of the DOCUMENTS only to internal staff with direct involvement in bid preparation or B) A Prime Contractor is allowed to provide sections of the DOCUMENTS to a Subcontractor and/or Supplier in order to solicit a bid/quote, but only after the Prime

Please select which type of DOCUMENT RECIPIENT is receiving these confidential documents and then provide the information below.

Contractor

I have read the above confidentiality agreement and agree to all the terms. Confirmed 06/29/2015 04:25 pm

**OK** **Cancel**

- After click “OK” Vendor Users will show a green bar along the top of the *Documents* tab indicating that they have secure access to the documents below

<input checked="" type="checkbox"/> Confidentiality agreement confirmed 06/29/2015. Report secure document distribution to subs/suppliers.			
#	Date	Name	Security
1	06/29/2015	c	
2	06/29/2015	Construction RFP Document - Secure	
3	06/29/2015	Contract for Well Replacement Insurance documents	

Showing 1 to 3 of 3

- Vendors click the “Report secure document distribution to subs/suppliers” inside this green bar
- A window appears in which the Vendor can add users and see who has agreed to the terms and viewed the document(s).

**Report Secure Document distribution to Subs/Suppliers**

*Use this form if you distribute copies of secure bid documents to subs/suppliers*

Representative Name *	Sub/Supplier *	License # *	Section of Document Distributed *	Date *
<a href="#">Add the first sub/supplier</a> <a href="#">View Confidentiality Agreement</a>				

OK
Cancel



## MAKE THE CONTRACT OPPORTUNITY VISIBLE TO THE PUBLIC

- To make the Contract Opportunity visible on the SFBid Website, for public access and for vendors to respond to the RFP
- Change the Yes/No switch, located on the lower left of the Contract Opportunity landing page from “NO” (default) to “Yes”

**SFBid TRAINING 2.2**

Contract List / WW-2621R

Welcome Kent | Account | My SFBid | Log off

Search SFBid

### Replace Groundwater Supply Well Stations (WW-2621R)

Manage Bid Submission Form

Deadline for Bids: 07/23/15 02:00 PM

SUMMARY | DOCUMENTS (0) | REQUEST FOR SUBS (0) | INTERESTED PARTIES (0) | QUESTIONS (0) | VENDOR ACTIVITY

**Project Description**

All groundwater supply well stations more than 50 years old must be replaced with state-of-the-art systems designed to last at least 100 years for the time of installation.

**Updates**

No Updates

Add Update

**Service Tags:**

[Civil Engineering](#) [Geotechnical Engineering](#)

**Bid Details**

Contract Type	Construction Services
City Department	San Francisco Public Utilities Commission (SFPUC)
Division(s)	Water
Estimated Cost	\$1,500,001
Due Date	7/23/2015
Due Time	2:00 PM
Contract Duration	2 Years
Advertisement Date	6/29/2015
LBE Goal	15%

**Pre-Bid Conference**

Date	7/10/2015
Time	9:00 AM
Attendance	Not Mandatory
Location	O'Shaughnessy Conference Room A, 2nd Floor 525 Golden Gate Ave, San Francisco, 94102

Visible on Website?  NO

RSVPs for Pre-Bid Conference: 0

[View Contract Form](#)

Copyright © 2015 San Francisco Public Utilities Commission, All Rights Reserved  
about | help | contact

Visible on Website?  YES

RSVPs for Pre-Bid Conference: 0

[View Contract Form](#)

- This will make the RFP immediately available on the SFBid website and will also generate a notification email to all vendors who have selected the relative service tags in their profile.

## UPDATE INFORMATION ON THE CONTRACT OPPORTUNITY

- Information on the Contract Opportunity landing page is editable; however depending on what it is, the window of being able to do this may vary.
  - Available for updates always.
    - Deadline for Bid Submissions (time)
    - “Updates”
  - Only available to update until the Contract is made visible on the website.
    - Project Description
  - Only available for editing/updating until it has been downloaded by at least one Vendor user.
    - Documents

## DEADLINE FOR BID SUBMISSIONS

- The Deadline for Bid Submissions is able to be modified any time, whether or not it has been made visible on the website.

## UPDATES

- “Updates” can be added to the Contract Opportunity at any time, whether or not it has been made visible on the website.
- Updates are similar to addendum in that they are additional information regarding contract specifics.
- Updates are permanently attached to the Contract opportunity and cannot be removed once posted.

## PROJECT DESCRIPTION

- The Project Description (populated by the *Summary of Scope of Services* in *Contract Basics*) can be elaborated upon, updated, and edited until the Contract has been made visible to the public.
- Once this has occurred, the Project Description becomes locked and the only way to clarify any mistakes or uncertainties is to add an update in the *Updates* section.

The screenshot shows a form with the following sections:

- Project Description:** A text box containing "BUILD PLANTER BOXES TO SCREEN PUMP STATION FROM THE VIEW OF THE LOCAL RESIDENTS." Below it is a link "Update Description".
- Updates:** A text box containing "No Updates". Below it is a link "Add Update".
- Service Tags:** A section with no tags listed.

On the left, a callout box asks "Visible on Website?" with a red toggle switch set to "NO". A yellow arrow points from this callout to the "Update Description" link.

The screenshot shows the same form as above, but with the following changes:

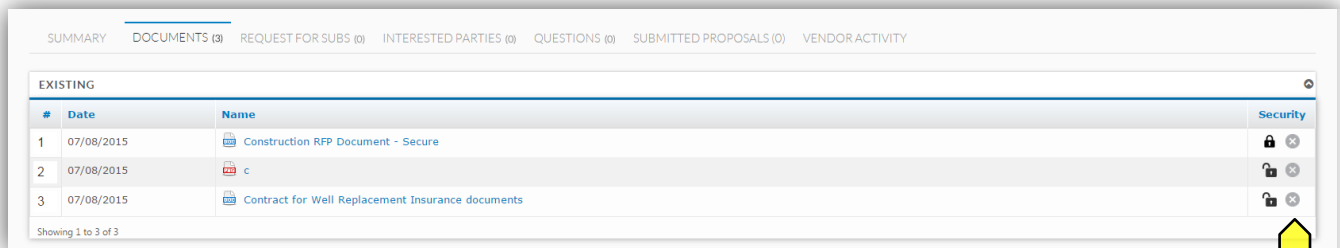
- Project Description:** A text box containing "All groundwater supply well stations more than 50 years old must be replaced with state-of-the-art systems designed to last at least 100 years for the time of installation." Below it is a link "Add Update".
- Updates:** A text box containing "No Updates". Below it is a link "Add Update".
- Service Tags:** Two tags are listed: "Civil Engineering" and "Geotechnical Engineering".










On the left, a callout box asks "Visible on Website?" with a green toggle switch set to "YES". A yellow arrow points from this callout to the "Add Update" link.

## DOCUMENTS

- Until the Contract Opportunity has been made public, you are able to add, edit and remove documents at will.
- Once a Contract Opportunity has been made visible and a document has been downloaded by a Vendor User, it is no longer removable or editable.
  - What you can do at this point is to upload a revision of the document. This will essentially archive the older version and users who have already viewed the documents and favorited the Contract Opportunity will receive an email informing them of a change to the Contract that they are interested in.
  - All Previous Versions of documents will remain visible on the website, but will appear as grayed out and below the document they have been replaced with.

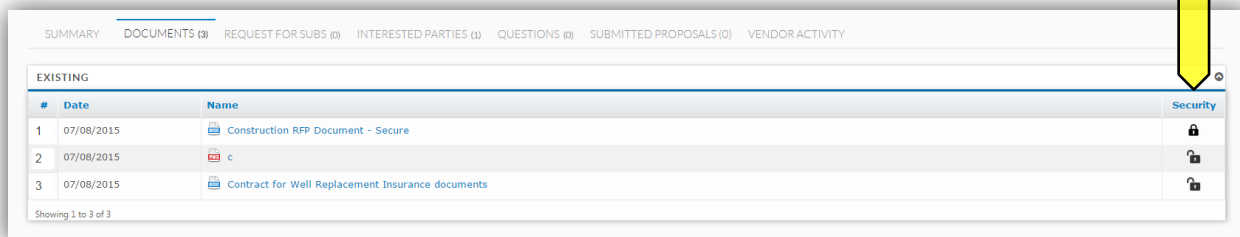
Documents that have *not yet been downloaded* will appear with a gray “X” on the far right of the document line, which when clicked will remove the document from the Documents queue:









#	Date	Name	Security
1	07/08/2015	 Construction RFP Document - Secure	 
2	07/08/2015	 c	 
3	07/08/2015	 Contract for Well Replacement Insurance documents	 

Showing 1 to 3 of 3

Documents that have *already been downloaded* will appear without the “X”:

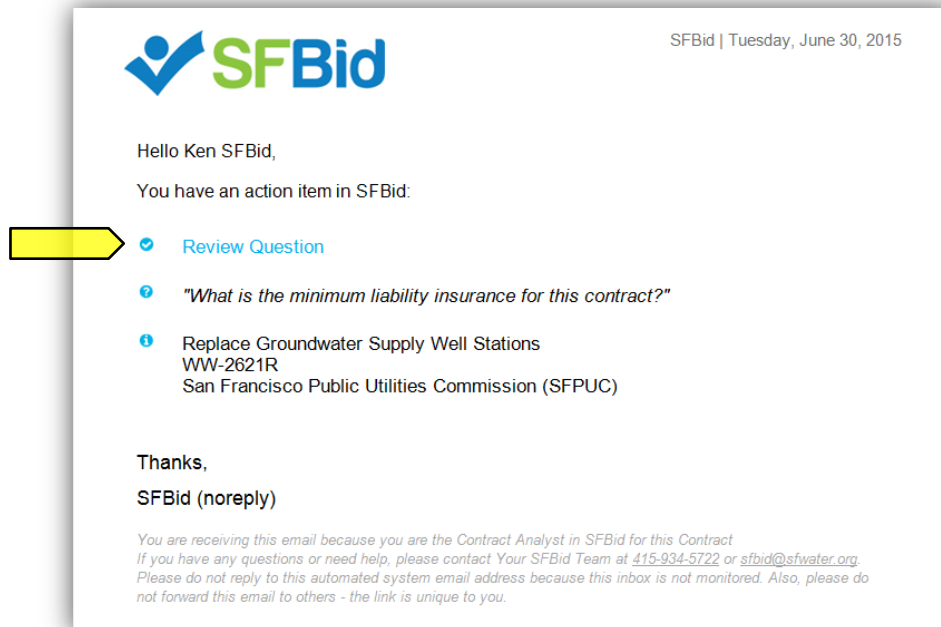


#	Date	Name	Security
1	07/08/2015	 Construction RFP Document - Secure	
2	07/08/2015	 c	
3	07/08/2015	 Contract for Well Replacement Insurance documents	

Showing 1 to 3 of 3

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

- When a Vendor User submits a question, you will receive an email notifying you that there is a question on your 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.

SUMMARY DOCUMENTS (3) REQUEST FOR SUBS (0) INTERESTED PARTIES (1) QUESTIONS (0) VENDOR ACTIVITY

No questions and answers posted Updated: N/A Question Deadline: Friday, 07/17/2015 Search Questions...

SUBMIT NEW QUESTION

SUBMITTED QUESTIONS (NOT POSTED YET)

Question/Answer	Category	Submitted	User	
<input type="checkbox"/> What is the minimum liability insurance for this contract?	Insurance	06/30/2015	CAN	

POSTED QUESTIONS AND ANSWERS

#	Question/Answer	Category	Submitted	Posted	Popularity
No questions					

- 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

QUESTION DETAILS

\*Category: Insurance

Spec. Section: Paragraph(s):

Drawing Sheet: Details:

submitted:  
What is the minimum liability insurance for this contract?

Formatted question to be posted: \*  
What is the minimum liability insurance for this contract?

Answer to be posted:

Time Submitted: 06/30/2015 9:17 AM Time Posted: N/A

Submitted By: Kate Long Email: sfwaterbest@gmail.com

Firm: ABC Consulting Phone: 14156641868

Addendum Needed:  Post Question Before Answered:

Comments

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.

No Action (Save Only) Email Question Save

- 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.

No Action (Save Only) Email Question

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

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- 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
<input checked="" type="checkbox"/> What is the minimum liability insurance for this contract?	Insurance	06/30/2015	CA

Action:   
 -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.

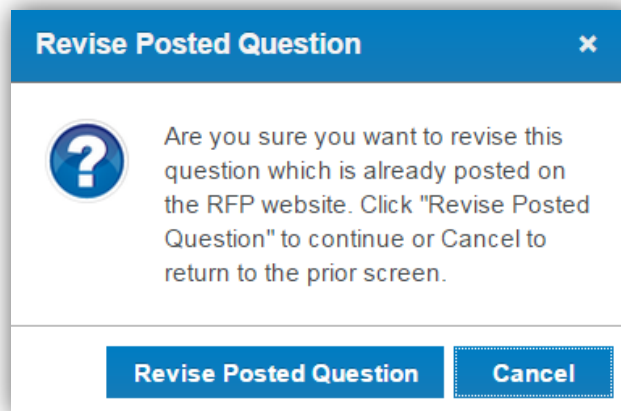
SUBMITTED QUESTIONS (NOT POSTED YET)			
Question/Answer	Category	Submitted	User
No questions			

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”