PROFESSIONAL SERVICES CONTRACT ANALYST

USER MANUAL

REVISED: 7/20/2015

SFBid Help Desk • (415) 934-5703 • sfbid@sfwater.org

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

Table of Contents

Log In	5
Request New SFBid Account Role	5
View Action Items on Landing Page	6
Review RFP and Select Templates	7
Schedule	7
RFP Document	8
Document Actions	8
View History	
Add Contributors	
Proposal Response Form	13
Sections	13
Fields	15
Preview	17
Save Form	
Return to Opportunity	
Manage Bid Submission Form	
Action	
Send to Contract Owner to Draft Scope	
Return to Contract Owner for Rework	
Save	
Review Initial Draft	20
Actions	20
Send to CMD MAnager for Assignment	20
Skip CMD	21
Return to COntract Owner for Rework	
Save	21

Review and Send to City Attorney	22
Actions	22
Send to City Attorney Manager for Assignment	22
Skip City Attorney	22
Return to Contract Owner for Rework	23
Final Review (if the CIty Attorney has reviewed your RFP)	24
Actions	24
Send Contract Analyst Manager for Final Review	24
Return to City Attorney for Rework	24
Post to advertisement page	26
Actions	26
Post to Advertisement Page	26
Return to Contract Analyst Manager for rework	27
Configure Advertisement Page	28
Upload Documents to Contract Opportunity	29
Manage/Create Proposal Response Form	30
Sections	30
Fields	32
Preview	34
Save Form	34
Return to Advertisement Page	34
Manage Secure Documents	35
Vendor view of secure documents (for Contract Analyst reference only)	36
Make the RFP Advertisement Page Visible to the Public	38
Update Information on the RFP	39
Deadline for Bid Submissions	39
Updates	39
Project Description	39
Documents	40
Review and Answer Questions	41

Question Details	41
Assign Questions to be answered by others	42
Post Question	43
Revisions to Questions	43

LOG IN

- As a city employee, you are already registered with SFBid.
- 1. Go to <u>https://sfbid.sfwater.org</u>
- 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	\$ 2.2	Log in Search SFBId
	*	
	sfbid@sfwater.org	
	 Stay signed in SIGN IN 	
	Need an account? Register here Forgot your password?	
	Copyright © 2015 San Francisco Public Utilities Commission, All Rights Reserved 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 <u>sfbid@sfwater.org</u> 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 are the primary Contract Analyst.
- 3. Click anywhere on the action item row to jump to that action item.

SFBid TRAINING 2.2	2				Welcom	e Pati 👗 🌟 Account My SF	·
ntract List / My SFBid						Search SFBid	
Start New Contract							
CTION ITEMS							4
Action	Number	Title					Days
Review and Approve RFP	PUC.PR0.0017.15	Level Approvers 1of2 Approved					81
Vrite RFP Document	PUC.PR0.0016.15	CO Write Doc					81
omplete RFP Form and Generate/Update RFP Template	PUC.PR0.0015.15	CO Generate Doc					81
ework RFP	PUC.PR0.0014.15	CO Rework					81
omplete RFP Draft	PUC.PR0.0011.15	Draft					81
/rite RFP Document	PUC.PR0.0042	Inspection Services for Pipeline					8
rite RFP Document	PUC.PRO.0043	Water Hydration Services for Warriors Parade					7
eview RFP	PUC.PRO.0044	Copy of: Draft					4
eview RFP	PUC.PRO.0046	Kate-01					1
howing 1 to 9 of 9							
Y CONTRACTS							
		Number	Amount	Status	Visible	Updated	_
Y CONTRACTS itle AN First Review		Number 90C980.0013.15		Status _StatusName	Visible	Updated 06/25/2015 4:47 PM	
itle			\$300,000 \$1,500	_StatusName Assign Contract Analyst	Visible	06/25/2015 4:47 PM 06/25/2015 4:46 PM	
Itle AN First Review M Gouldeline change esting contract initiation		PUC.PR0.0013.15 PUC.PR0.0051 PUC.PR0.0036	\$300,000 \$1.500 \$0	_StatusName Assign Contract Analyst Draft	Visible	06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM	
tle NY First Review MD guideline change stript contract initiation vickly		PUC.PR0.0013.15 PUC.PR0.0051 PUC.PR0.0036 PUC.PR0.0045	\$300.000 \$1.500 \$0 \$1.501	_StatusName Assign Contract Analyst Draft Review & Send to City Attorney	Visible	06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:54 PM	
tte NY First Review 40 guideline change statig contracts initiation activity say of Draft		PUC.PR0.0013.15 PUC.PR0.0036 PUC.PR0.0036 PUC.PR0.0044	\$300.000 \$1.500 \$0 \$1.501 \$300.000	_StatusName Assign Contract Analyst Draft Review & Send to City Attorney Select Business Approvers	Visible	06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:54 PM 06/25/2015 2:54 PM	
No Prost Review MD providence change extra generates initiation uckly poy of Draft end 1		PUC.PRO.0013.13 PUC.PRO.0045 PUC.PRO.0045 PUC.PRO.0044	\$300.000 \$1.500 \$1.501 \$1.501 \$300.000 \$1.501	_StatutName Assign Contract Analyst Draft Review & Send to Oty Attorney Select Business Approvers Select Business Approvers		06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:54 PM 06/25/2015 2:28 PM 06/25/2015 2:28 PM	
NI Fras Review ND Systeme - MD guideline change seting contract initiation cickly say off Ords star-01 cichlical Services for Pipeline Renewal		PUC-PR0.0013.15 PUC-PR0.0055 PUC-PR0.0045 PUC-PR0.0045 PUC-PR0.0044 PUC-PR0.0044 PUC-PR0.0041	\$300.000 \$1,500 \$1,301 \$300.000 \$1,500 \$4,600.000 \$4,600.000	_StatusName Assign Contract Analyst Draft Review 5. Select Business Approvers Select Business Approvers Posted	Visible Ves	06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:54 PM 06/25/2015 2:28 PM 06/25/2015 2:28 PM 06/17/2015 4:22 PM	
Ne Fort Review MD guideline change esting contract initiation uckfur uckfur apy of i Draft Exet01 Ex		NC FR0 0613 NC FR0 0614 NC FR0 0614 NC FR0 0614 NC FR0 0614 NC FR0 0614	\$100,000 \$1.300 \$1.301 \$1.301 \$1.001 \$1.300 \$4.40,000 \$4.40,000	_Statustiane Arsign Contract Analyst Draft Rowine & Send to City Attorney Select Business Approvers Select Business Approvers Rosted Draft Scope & Response Form		06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:54 PM 06/25/2015 2:28 PM 06/25/2015 2:28 PM 06/17/2015 4:22 PM 06/17/2015 4:27 PM	
NA Pras Review ND prast Review ND prast Review sectors constraint initiation uncelly pay of Draft sectors for Popular Removal activities for Popular Removal actar Hydration Services for Matrices Reade spacetion Services for Physice		PUC.PR0.0013.13 PUC.PR0.0055 PUC.PR0.0055 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0041 PUC.PR0.0043	000.001 001.13 100.101 100.001 100.	_Statustame Arsign Contract Analyst Dank Review & Send 10 Dity Attorney Select Business Approves Select Business Approves Rested Dank Scope & Reponse Form Dank Scope & Reponse Form	Yes	6/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:54 PM 06/25/2015 2:28 PM 06/17/2015 4:22 PM 06/17/2015 4:27 PM 06/17/2015 4:27 PM	
No Prist Review. No Prist Review. No publisher change exposition of the second		NC PRO 0913 NC PRO 0914 NC PRO 0914 NC PRO 0914 NC PRO 0914 NC PRO 0914	\$100,000 \$1.300 \$1.301 \$1.301 \$1.001 \$1.300 \$4.40,000 \$4.40,000	_Statustame Arsign Contract Analyst Dank Review & Send 10 Dity Attorney Select Business Approves Select Business Approves Rested Dank Scope & Reponse Form Dank Scope & Reponse Form		06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:54 PM 06/25/2015 2:28 PM 06/25/2015 2:28 PM 06/17/2015 4:22 PM 06/17/2015 4:27 PM	
NA Pras Review MD publisher change substy substy say off oraf: set01 set		PUC.PR0.0013.13 PUC.PR0.0055 PUC.PR0.0055 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0041 PUC.PR0.0043	000.001 001.13 100.101 100.001 100.	_Statustame Arsign Contract Analyst Dank Review & Send 10 Dity Attorney Select Business Approves Select Business Approves Rested Dank Scope & Reponse Form Dank Scope & Reponse Form	Yes	6/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:54 PM 06/25/2015 2:28 PM 06/17/2015 4:22 PM 06/17/2015 4:27 PM 06/17/2015 4:27 PM	
NA Pras Review MD publisher change substy substy say off oraf: set01 set		PUC.PR0.0013.13 PUC.PR0.0055 PUC.PR0.0055 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0041 PUC.PR0.0043	000.001 001.13 100.101 100.001 100.	_Statustame Arsign Contract Analyst Dank Review & Send 10 Dity Attorney Select Business Approves Select Business Approves Rested Dank Scope & Reponse Form Dank Scope & Reponse Form	Yes	06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:28 PM 06/25/2015 2:28 PM 06/17/2015 2:28 PM 06/17/2015 4:22 PM 06/17/2015 7:37 AM 06/16/2015 1:48 PM	
NI First Review MD Systeme Change exting contract Initiation (why) way off Orafs exhibited Services for Papeline Renewal exhibited Services for Papeline Renewal Atter Hydroton Service for Warrog Braste research Services for Papeline Reid Transing with Kate howing 1 to 30 of 26		PUC.PR0.0013.13 PUC.PR0.0055 PUC.PR0.0055 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0041 PUC.PR0.0043	000.001 001.13 100.101 100.001 100.	_Statustame Arsign Contract Analyst Dank Review & Send 10 Dity Attorney Select Business Approves Select Business Approves Rested Dank Scope & Reponse Form Dank Scope & Reponse Form	Yes	06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:28 PM 06/25/2015 2:28 PM 06/17/2015 2:28 PM 06/17/2015 4:22 PM 06/17/2015 7:37 AM 06/16/2015 1:48 PM	Next
NN Frst Review MD grudelne change asting contract initiation cickly grudelne change exhibited Services for Pipeline Renewal activities for Pipeline Renewal activities for Warrow Brade aspects Services for Pipeline Reid Transing with Kate howing 1 to 10 of 26		PUC.PR0.0013.13 PUC.PR0.0055 PUC.PR0.0055 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0041 PUC.PR0.0043	000.001 001.13 100.101 100.001 100.	_Statustame Arsign Contract Analyst Dank Review & Send 10 Dity Attorney Select Business Approves Select Business Approves Rested Dank Scope & Reponse Form Dank Scope & Reponse Form	Yes	06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:28 PM 06/25/2015 2:28 PM 06/17/2015 2:28 PM 06/17/2015 4:22 PM 06/17/2015 7:37 AM 06/16/2015 1:48 PM	
NA Pras Review MD publisher change substy substy say off oraf: set01 set		PUC.PR0.0013.13 PUC.PR0.0055 PUC.PR0.0055 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0041 PUC.PR0.0043	000.001 001.13 100.101 100.001 100.	_Statustame Arsign Contract Analyst Dank Review & Send 10 Dity Attorney Select Business Approves Select Business Approves Rested Dank Scope & Reponse Form Dank Scope & Reponse Form	Yes	06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:28 PM 06/25/2015 2:28 PM 06/17/2015 2:28 PM 06/17/2015 4:22 PM 06/17/2015 7:37 AM 06/16/2015 1:48 PM	
NN First Review MD public change schip contract initiation cickly pay of Draft sets-1 schild Services for Pipeline Renewal acter Hydration Service for Warrow Bracke sets-1 sectors for Pipeline Renewal acter Hydration Service for Warrow Bracke sets-1 Sector Services for Pipeline Wald Training with Kate		PUC.PR0.0013.13 PUC.PR0.0055 PUC.PR0.0055 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0045 PUC.PR0.0041 PUC.PR0.0043	000.001 001.13 100.101 100.001 100.	_Statustame Arsign Contract Analyst Dank Review & Send 10 Dity Attorney Select Business Approves Select Business Approves Rested Dank Scope & Reponse Form Dank Scope & Reponse Form	Yes	06/25/2015 4:47 PM 06/25/2015 4:46 PM 06/25/2015 4:46 PM 06/25/2015 4:42 PM 06/25/2015 2:28 PM 06/25/2015 2:28 PM 06/17/2015 2:28 PM 06/17/2015 4:22 PM 06/17/2015 7:37 AM 06/16/2015 1:48 PM	

REVIEW RFP AND SELECT TEMPLATES

- The Contract Owner will initiate the RFP in SFBid and begin to create the framework, and then will send the RFP on to the Contract Analyst Manager who will then assign you or another analyst to continue work on building the RFP.
- After the Contract Analyst Manager has assigned you as the Contract Analyst on an RFP, you will receive an email from SFBid.
- In this email, click on the blue link to jump into SFBid.



- After logging in to the system, you will arrive at the RFP Web Form page for the specified RFP.
- Review the information entered by the Contract Owner and perused by your Manager
 - o Basics
 - Labels
 - o User Info
- Review any comments made at the bottom of the RFP Web Form.
- Make changes to the form as necessary.
- Complete the new sections of the RFP Web Form:
 - o Schedule
 - o RFP Word Document
 - RFP Form Builder

SCHEDULE

- Complete the RFP Schedule blind which consists of a list of the different events which typically occur during the RFP process.
- Advertisement Date:
 - o The default "Advertisement of RFP" date is the date the RFP was submitted initiated.
 - If the Contract Owner (CO) previously selected an Advertisement Date for the RFP, then this will appear at the top
 of the "Date" column in the schedule.
 - o If the CO did not select a date, and you would like to select a particular date, enter the date in the blank field.
 - If neither you nor the CO have a particular date in mind, you can user the schedule generator to suggest one for you by clicking the blue "Generate Suggested Schedule" link or the gray Sicon in the top left of the Schedule blind.

$oldsymbol{\Theta}$ Adjust the "Advertisement of RFP" date and then click the "Generate suggested schedule" link to s	tart with a default suggested schedule.		
ienerate suggested schedule 🔂			
Event	Date	Time	
dvertisement of RFP	07/06/20	N/A	*
Pre-Submittal Conference			Û
Site Visit		N/A	節
eadline for Proposers to Submit Questions		N/A	*
eadline for Proposers to Submit Proposals			*
Posting of Proposer Ranking		N/A	節
Public Utilities Commission Authorization to Execute Agreement		N/A	Û
Deadline for Proposer to Achieve Vendor Compliance and Execute Agreement		N/A	Û
Board of Supervisor's Approval		N/A	Û
Notice of Award of Agreement		N/A	節

- Enter dates and times as desired for a schedule, or click the blue schedule generator link to have SFBid suggest dates following a typical timeline for RFP Schedules.
- You may remove events which do not apply by clicking the gray trashcan to the right of the event.
 - Note: A red asterisk (*) denotes a required field and cannot be removed from the schedule.
- Add new events by clicking the "Add Event" link at the bottom of the list.
- You may edit the suggested dates freely, throughout the workflow process, in order to create an RFP schedule that works for you and follows the RFP's progress. If the RFP is somehow delayed, communicate with the Contract Team and make adjustments as necessary.

RFP DOCUMENT

- The RFP Document is a preformatted document based on the standard RFP Template. As information is filled into the Contract Web Form, the RFP Document will populate the information following the prescribed format.
- The schedule, tasks, etc. will populate to the RFP Document as both the Contract Owner and Contract Analyst enter the information.
- The Scope of Work can be expanded upon and contractual clarifications and specifics should all be added directly to the RFP Document.
- Editing should always be done in the response field outside of the document if it has been populated by SFBID into the RFP Document. This will be noted in a notification ribbon at the bottom of the RFP Document if you click into a text area that is locked by the web form formatting.
- When Reviewing the RFP, users can simply choose the "Read Only" option.
- Should additional information be required and the Document be opened for editing, users must click on "Open (Check Out)" and "Check In" when done.

DOCUMENT ACTIONS

• Click on the RFP Document blind to view available actions for the RFP Document.

Version 2.0 Last updated at 06/22/15 04:54 PM	Previo	ous Versions		
Available for editing	2.0	System Account	System Generated	06/22/15 04:54 PM
C Refresh Document	1.0	System Account	SFBid System Generated RFP	06/22/15 04:52 PM
Open (Check Out)				
Read Only				
Upload new Version				

OPEN (CHECK OUT)

- Clicking on the "Open (Check Out)" link will open the RFP Document from the central SharePoint location.
 - The RFP Document in SharePoint is always the latest version of the document, so the "Check Out" option should be used in almost every case.
- You will need to enter:
 - Your @sfwater email address
 - Your password (same password that you use on your work computer.

Sign In	
Email Address:	
patsfbid@sfwater.org	
Password:	
•••••	
C Stay signed in	Login

- While you have the document "checked out" for editing, other users can view, but cannot edit the RFP Document. This prevents conflicting changes to the document.
- When you are done editing the RFP Document, you must "Check In" the document to save your changes and allow others to view the RFP Document in SharePoint.

•

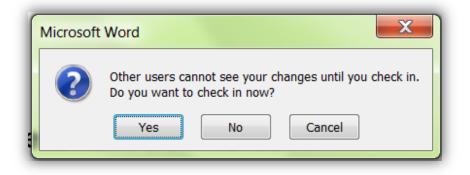
 \circ $\;$ Do this by clicking the "File" menu at the top and then pressing the "Check In" button.

	n about PUC.PRO.0218.14 1/RFPPUCPR0021814/PUC.PRO.0218.14.docx
Check In	Checked Out Document No one else can edit this document or view your changes until it is checked in. Discard Check Out

- As you check in the document, you can enter comments to describe the changes saved to this version.
- In order to continue to continue working on the RFP Document after saving changes, check the box for "Keep the document checked out after checking in this version."
 - Checking in the document as you work allows other users/contributors to see the most up-to-date RFP.
 - If you keep the document checkout, other contributors can only see it in the Read-Only version and are unable to make edits until you have checked the document back in.

Version Comments		
Drafted the detailed Scope	of Work for the RFP.	
Keep the document chec	ked out after checking in this version.	
Keep the document check	Ked out after checking in this version.	Ca

• If you happen to close out the window before checking in the document, you will receive a pop-up prompt asking if you would like to check the document back in. Select "Yes" to check the document in.



- If you do not wish to keep any of your changes, you can select to Discard Check Out
 - Do this by clicking the "File" menu at the top and then pressing the "Check In" button; or

	on about PUC.PRO.0218.14 01/RFPPUCPRO021814/PUC.PRO.0218.14.docx
Check In	Checked Out Document No one else can edit this document or view your changes until it is checked in.

 \circ $\;$ Do this by closing out the document and clicking on the red "Discard Check Out" $\;$

Version 11.0 Last updated at 06/25/15 09:37 AM	Previo	ous Versions		
Currently locked for editing by you.	11.0	Pat SFBid		06/25/15 09:37 AM
	10.0	System Account	System Generated	06/22/15 04:43 PM
Open	9.0	Ken SFBid	XX	06/22/15 04:11 PM
Check In	8.0	System Account	System Generated	06/22/15 03:40 PM
Discard Checkout	7.0	System Account	System Generated	06/22/15 03:30 PM
	Show a	II versions		

• The Discard Check Out option will remove any changes that you have made to the document and will not be reflected in the "Previous Version History" and comments.

READ ONLY

• Clicking this link downloads a local copy of the latest version of the RFP Document to your desktop, but does not include SharePoint integration.

Version 11.0 Last updated at 06/25/15 09:37 AM	Previo	us Versions		
Available for editing	11.0	Pat SFBid		06/25/15 09:37 AM
CREfresh Document ()	10.0	System Account	System Generated	06/22/15 04:43 PM
Open (Check Out)	9.0	Ken SFBid	XX	06/22/15 04:11 PM
Read Only	8.0	System Account	System Generated	06/22/15 03:40 PM
Upload new Version	7.0	System Account	System Generated	06/22/15 03:30 PM
	Show all	versions		
Upload new Version		System Account		06/22/15 03:30

- You cannot edit the document until you check it out, which can be done within the Read Only document.
 - The yellow ribbon at the top of the page will have a "Check Out" button. Click this and enter your email and password information.

File Home Insert Page Layout References Mailings Review	View Dev

- If you open a read only copy of the document and share it outside of SharePoint, local copies will not be saved in SFBid. Should a more recent version of the document need to be entered into SFBid and is outside of SharePoint, you will need to upload the newest version of the document to the system.
 - Please note that documents uploaded to SharePoint through SFBid will remove previous versions which may have changes that were made between the times that the RFP Document was downloaded from the website and returned in a modified version.
 - It is recommended that documents not be shared and modified outside of the SFBid/SharePoint system, however should this happen, click the blue "Upload New Version" button and browse your local files for the document you wish to upload.

Version 11.0 Last updated at 06/25/15 09:37 AM	Previo	ous Versions		
Available for editing	11.0	Pat SFBid		06/25/15 09:37 AM
	10.0	System Account	System Generated	06/22/15 04:43 PM
Open (Check Out)	9.0	Ken SFBid	XX	06/22/15 04:11 PM
Read Only	8.0	System Account	System Generated	06/22/15 03:40 PM
Upload new Version	7.0	System Account	System Generated	06/22/15 03:30 PM
	Show al	lversions		

VIEW HISTORY

Clicking the "View History" link will expand the form to show all the versions of the SharePoint RFP Document, including user comments.

Version 10.0	Previous Versions		
Last updated at 06/22/15 04:43 PM Available for editing	10.0 System Account	System Generated	06/22/15 04:43 PM
C Refresh Document	9.0 Ken SFBid	XX	06/22/15 04:11 PM
Open (Check Out)	8.0 System Account	System Generated	06/22/15 03:40 PM
Read Only	7.0 System Account	System Generated	06/22/15 03:30 PM
Upload new Version	6.0 System Account	System Generated	06/22/15 03:26 PM

ADD CONTRIBUTORS

You can click on the "Add Contributors" link to invite your colleagues to give contribute to the drafting of the RFP.
 Contributors can view and edit the RFP Document with you in SharePoint.

Version 10.0 Last updated at 06/22/15 04:43 PM	Previous	s Versions		
Available for editing	10.0	System Account	System Generated	06/22/15 04:43 PM
CREfresh Document 🚯	9.0	Ken SFBid	XX	06/22/15 04:11 PM
Open (Check Out)	8.0	System Account	System Generated	06/22/15 03:40 PM
Read Only	7.0	System Account	System Generated	06/22/15 03:30 PM
Upload new Version	6.0	System Account	System Generated	06/22/15 03:26 PM
	Show all ve	ersions		

• Select users from the searchable drop-down list and click the "Share" button to send your colleagues an email.

Share draft document with other users		
kl	Share	(Notification will be sent to selected users)
Type at least 3 characters		-

PROPOSAL RESPONSE FORM

 Click the green Create Proposal Response Form button in the Proposal Response Form blind to open the form builder and begin framing questions and information/documentation requests you wish to have Vendors respond to as part of your RFP.

• Ose this billio to configure the respo	n 🕑 Start with a proposal form template	I. Click "create response form" and then select a system template or start from scratch. Both the Contract Analyst and
Contract Owner can work on the respo	- Select Template	Intract is advertised.
Create Proposal Response Form	Start with a blank proposal form template	

- Select a template from the dropdown list; or
- Check the box to start with a new blank Form in which you can create your own inquiries for response.
- These questions will be integrated into the RFP document as you build the form.

SECTIONS

- After you click "Create", you will be taken to the blank page or template of your RFP Response Form.
- Blinds in the Form Builder are called "Sections"
- Click the blue "Add the first section" link on the left to open the first section.

SFBIO TRAINING 2.2	Welcome Pat! Act	count My SFBid	U Log off
Contract List / Form Builder (Professional Services Proposal)		Search SFBid	
Graywater and Rainwater Harvesting			
Proposal Response Form Builder Professional Services Proposal Form			
Add the first section	Form Fields		
Preview	Drag and drap fields onto the form on the Save Form	he left.	
	Text Line		
	¶ Text Area		
	B Text Formatted		
	 Checkbox 		
	Multiple Choice		
	Date Picker Dropdown Options		
	 Dropdown Options File Attachment(s) 		
	Yes/No Switch		
	Custom Table		
	Show Custom Controls		
Copyright © 2015 San Francisco Public Utilities Commission, All Rights Res	served		
about help contact			

• Click the blue "Add another section" at the bottom of the page to add additional sections.

Drag a control here to start			Drag and drag fields onto the form on the left. functions Text Line Text Line Text Area
Add another section			Tevt Area
			B Text Formatted
Preview	Save For	m	Multiple Choice Date Picker

- 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 Tile" 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.

✓ P & ダ N N 県 ③ O O O O O O O O I O O I O O O I O O O I O O O I O O O O I O	×
Section Icon (Optional) デ ※ M ② ※ ※ ※ ※ ● 第 出 日 図 図 図 ② グ ③ 1) ② ● 05 図 20 0 前 回 ② ② ③ 10 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
◎▲@//グ◎▲単泉田図■甲田園園図◎/③⇒№000000000000000000000000000000000000	
✓ P & ダ N N 県 ③ O O O O O O O O I O O I O O O I O O O I O O O I O O O O I O	Filter
	$\begin{array}{c} \blacksquare \blacksquare \blacksquare \textcircled{\basel{thm:self} \basel{thm:self} \blacksquare \blacksquare \textcircled{\basel{thm:self} \blacksquare \blacksquare$
	Ok

Sections can be dragged up and down by clicking and holding the navigation icon the top left of each blind.
 A tan area will appear where the dragged section will land upon release.

Name	Description	
Files will appear here		
+ in INSURANCE INFORMATION	*0×	
	Drag a control here to start	
	+ 📔 [UNTITLED SECTION]	
+ PREVIOUS WORKS		
Move Section using this handle		

FIELDS

• Click to drag the first field into the new blind.

🕂 👻 BUSINESS INFORMATION	★
	Drag and drop fields onto the form on the left.
Drag a control here to start	Instructions
	Text ine
<u> </u>	
Add another section	B of For atted
	Multiple Choice
	Preview Save Form 🛗 Date Picker
	Dropdown Options
	Q Site Attraction
	Sile Attachment(s)

- Multiple fields can be dragged and dropped into each section or "blind," creating the visible frames between relative information.
- Ask questions, create response forms, request information/documentation and construct agreements using the various fields in the form builder.

4. W	BUSINESS INFORMATION	★ @ × Form F	elds
	Use the following fields to provide references, documentation and business/employee information. Note: to be be considered qualified for this contract, you must have a minimum of 2 previous jobs values at over \$200,000 and be approved through the Pre-Qualification PQ-1500 (pool date valid January 2015- January 2016, and in good standing with the SPIPUC.	ල ins — Teo ¶ Teo	t Line
	Phine Vendor Business Name As registered with the City and County of San Francisco and/or State of California.	✓ Chi Ⅲ Mu 齡 Dat	
	Dustiness License Number Are you submitting this proposal as a Joint Venture (V)? NO NO	 File Ver 	Attachment(s) No Switch tom Table
÷	Employes/Sub-Contractor Name Employes/Sub-Contractor FEIN (if not applicable, note "n/a") Criminal Background on file/ Cleared for Secure document Table content will appear here		
	" " We are Pre-Qualified through the PQ-1500 If you did not submit and receive certification for this Pre-Qualification, you are unable to bid on this contract. PQ-1500 certificate here for verification.		
	Name Description		
	Files will appear here		
÷ m	[UNITITED SECTION]	* 0 ×	

- 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
 - o Validation
 - Email
 - Phone
 - Dollar Amount
 - Default Value

Field Title	Prime Vendor Business Name
Help Text	As registered with the City and County of San Francisco and/or State of California.
Advanced Properties	
Default Value	
Max Length (Characters with spaces)	100
Required?	
Validation	Text
	Cancel OK
*Business License Number	
Field Title	Are you submitting this proposal as a Joint Venture (JV)?
Help Text	If so, please note all JV Partners below
Advanced Properties	
Default Value	
Show Reason on Yes	8
Show Reason on No	
Reason Text	
Default Reason	
Reason Max Length	250
Reason Required?	
Message when Yes	
Message when No	

- 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 O 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" button, then "Preview."
 - The "Preview" option allows you to see and test out the form as the Vendors would see it.
 - o 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.

Add another section	
	Save Form
	Copyright © 2015 San Francisco Public Utilities Commission, All Rights Reserved

RETURN TO OPPORTUNITY

- To return to the Contract Opportunity landing page, click the back button of your browser.
 - 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 "Manage Proposal Response Form" button in the *Proposal Response Form* blind.

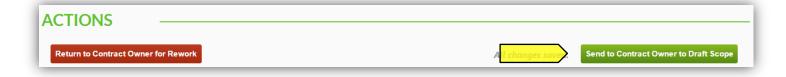
PROPOSAL RESPONSE FORM	0 0
• Use this blind to configure the response form the vendor will use to submit their proposal or bid. Click "create response Contract Owner can work on the response form, but it does not need to be completed until the contract is advertised.	form" and then select a system template or start from scratch. Both the Contract Analyst and
Manage Proposal Web Form	

ACTION

- You may enter comments for your co-workers in the comment box at the bottom of the form. Comments entered here will be included in system emails and comment history will be visible to other users in the "discussion" section at the bottom of this form.
- The actions available to you at this step are listed below:

SEND TO CONTRACT OWNER TO DRAFT SCOPE

 Choosing this action will send the RFP Web Form forward to the Contract Owner and prompt them to draft the Scope of Work and to continue work on the RFP Response Form.



RETURN TO CONTRACT OWNER FOR REWORK

- Choosing this action will return the RFP Web Form to the Contract Owner for rework, after which point it must be resubmitted to you for approval before the RFP Template is generated.
 - Note: You must add a comment in order to move an RFP back in the workflow for rework.

ACTIONS	
Return to Contract Owner for Rework	All changes saved. Send to Contract Owner to Draft Scope

SAVE

• All changes are AutoSaved in the RFP workflow (outside of form builder). You will not need to save as you go.

REVIEW INITIAL DRAFT

- The Contract Owner will input the required information and the RFP will be sent forward in the workflow to you to continue work on building the RFP.
- After the Contract Owner has submitted the RFP into the workflow, you will receive an email from SFBid.
- In this email, click on the blue link to jump into SFBid.



- After logging in to the system, you will arrive at the RFP Web Form page for the specified RFP.
- Review the new information entered by the Contract Owner
 - Task Titles
 - Service Types
 - RFP Document (continued)
 - Proposal Response Form (continued)
- Review any comments made at the bottom of the RFP Web Form.
- Make changes to the form as necessary.
- Continue to add to the RFP Document and Proposal Response Form as needed.

ACTIONS

- After reviewing the RFP and making any necessary changes, you have three options for actions:
 - Send To CMD Manager for Assignment
 - o Skip CMD
 - o Return to Contract Owner for Rework

SEND TO CMD MANAGER FOR ASSIGNMENT

 If the information in all of the blinds and the RFP Document is complete and there is a need for CMD to review the RFP and input their information, click the green "Send to CMD Manager for Assignment" button Located on the bottom right of the page.

ACTIONS				
Return to Contract Own	er for Rework	All changes saved.	Skip CMD	Send to CMD Manager for Assignment

SKIP CMD

- Click the gray "Skip CMD" button, located on the bottom right of the page, if the information in all of the blinds and the RFP Document is complete and input from CMD is not necessary.
- If CMD is not required for this RFP, then it will move forward in the workflow to the Contract Owner to select Business Approvers.

ACTIONS			
Return to Contract Owner for Rework	All c <mark>hanges saved.</mark>	Skip CMD	Send to CMD Manager for Assignment

RETURN TO CONTRACT OWNER FOR REWORK

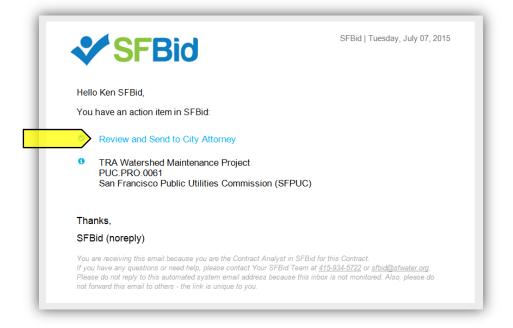
- Click the Red "Return to Contract Owner for Rework" button. Located at the bottom left of the page, if there is information lacking still for the RFP.
- Choosing this action will return the RFP Web Form to the Contract Owner for rework, after which point it must be resubmitted to you for approval before moving forward to CMD.
 - Note: You must add a comment in order to move an RFP back in the workflow for rework.

Return to Contract Ow	wner for Rework	All changes saved.	Skip CMD	Send to CMD Manager for Assignme
-----------------------	-----------------	--------------------	----------	----------------------------------

SAVE

• All changes are AutoSaved in the RFP workflow (outside of form builder). You will not need to save as you go.

- You will be receiving the RFP again after it has been reviewed by CMD and/or Business Approvers (as needed).
- After this, you will receive an email asking you to "Review and Send to City Attorney."
- In this email, click on the blue link to jump into SFBid.



- After logging in to the system, you will arrive at the RFP Web Form page for the specified RFP.
- Review any new information entered by the Contract Owner, CMD or Business Approvers.
- Review any comments made at the bottom of the RFP Web Form.
- Make changes to the form as necessary.
- Continue to add to the RFP Document and Proposal Response Form as needed.
- Add comments as necessary.

ACTIONS

SEND TO CITY ATTORNEY MANAGER FOR ASSIGNMENT

- Clicking this button will submit the RFP Web Form to the assigned City Attorney for their review.
- After the City Attorney has reviewed and approved the RFP, it will move forward in the workflow to your queue for a Final Review.

ACTIONS -				
Return to Contract Owner for R	tework	All changes saved.	Skip City Attom	Send to City Attorney Manager for Assignment

SKIP CITY ATTORNEY

• Click the gray "Skip City Attorney" button, located on the bottom right of the page, if the information in all of the blinds and the RFP Document is complete and input from the City Attorney's office is *not* necessary.

• If the City Attorney's review is not required for this RFP, then it will move forward in the workflow to your manager for Final Review.

ACTIONS	
Return to Contract Owner for Rework	Skip City Attorney Send to City Attorney Manager for Assignment

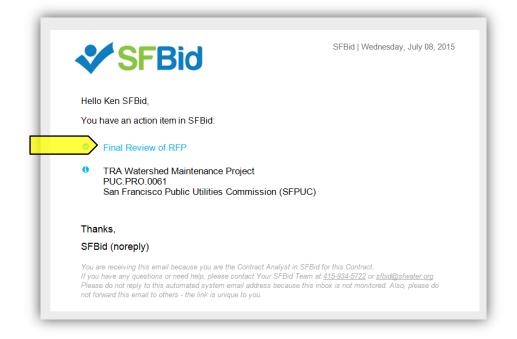
RETURN TO CONTRACT OWNER FOR REWORK

- Click the Red "Return to Contract Owner for Rework" button. Located at the bottom left of the page, if there is information lacking still for the RFP.
- Choosing this action will return the RFP Web Form to the Contract Owner for rework, after which point it must be resubmitted to you for approval before moving forward to the City Attorney's office.
 - Note: You must add a comment in order to move an RFP back in the workflow for rework.

ACTIONS		-
Return to Contract Owner for Rework	All changes saved. Skip City Attorney Send to City Attorney Manager for Assignment	

FINAL REVIEW (IF THE CITY ATTORNEY HAS REVIEWED YOUR RFP)

- Once the City Attorney has approved the RFP, you will have a last chance for final review.
- After this, you will receive an email asking you to "Final Review"
- In this email, click on the blue link to jump into SFBid.



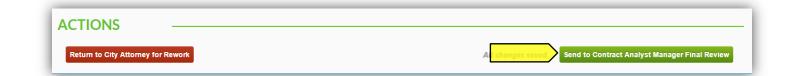
- After logging in to the system, you will arrive at the RFP Web Form page for the specified RFP.
- You have two actions:
 - Send to your manager for final review; or
 - Return to the Contract Owner for rework.
- Review any notes or changes to any of the Proposal Response Form and/or RFP Document.
- Review any comments made at the bottom of the RFP Web Form.
- Add comments as necessary.

Note: If the City Attorney's office was not included on this RFP, this step will be skipped and your RFP will go directly to your manager for Final Review.

ACTIONS

SEND CONTRACT ANALYST MANAGER FOR FINAL REVIEW

• Clicking this button will submit the RFP Web Form to your manager for review.



RETURN TO CITY ATTORNEY FOR REWORK

- Click the Red "Return to City Attorney for Rework" button. Located at the bottom left of the page, if there is information lacking still for the RFP.
- Choosing this action will return the RFP Web Form to the City Attorney for rework, after which point it must be resubmitted to you for approval before moving forward to the Contract Analyst Manager for Final Review.
 - Note: You must add a comment in order to move an RFP back in the workflow for rework.

ACTIONS		
Return to City Attorney for Rework	All changes saved.	Send to Contract Analyst Manager Final Review

- Once your Manager has given final approval of the RFP, it will return to your queue.
- You will receive an email asking you to "Post to Advertisement Page"
- In this email, click on the blue link to jump into SFBid.

	SFBid	SFBid Wednesday, July 08, 201
Hel	lo Ken SFBid,	
You	I have an action item in SFBid:	
	Post RFP	
0	TRA Watershed Maintenance Project PUC.PRO.0061 San Francisco Public Utilities Commission (SF	PUC)
•	"Ken, this looks great! Go ahead and create the yet. " - Comment from Art SFBid	e Ad page, but don't make it public
Tha	anks,	
SFI	Bid (noreply)	
lf yo Plea	are receiving this email because you are the Contract Analyst u have any questions or need help, please contact Your SFBid se do not reply to this automated system email address becau orward this email to others - the link is unique to you.	l Team at <u>415-934-5722</u> or <u>sfbid@sfwater.org</u> .

- After logging in to the system, you will arrive at the RFP Web Form page for the specified RFP.
- You have two actions:
 - Post to Advertisement Page; or
 - Return to the Contract Analyst Manager for rework.
- Review any notes or changes to any of the Proposal Response Form and/or RFP Document.
- Review any comments made at the bottom of the RFP Web Form.
- Add comments as necessary.

ACTIONS

POST TO ADVERTISEMENT PAGE

- Click the green button.
- Clicking this button will create an Advertisement Page for your RFP.

ACTIONS	
Return to Contract Analyst Manager for Rework	All changes says, Create Opportunity Page

• Once you have click this button, you will be redirected to the Advertisement Page for further work.

Note: This will NOT make your RFP public yet. There are still more steps before you will make it visible to the public. This will simply create the page.

RETURN TO CONTRACT ANALYST MANAGER FOR REWORK

- Click the Red "Return to Contract Analyst Manager for Rework" button. Located at the bottom left of the page, if there is information lacking still for the RFP.
- Choosing this action will return the RFP Web Form to your Manager for rework, after which point it must be resubmitted to you for Posting to the Advertisement Page.
 - Note: You must add a comment in order to move an RFP back in the workflow for rework.

ACTIONS -			
Return to Contract Analyst Man	ager for Rework	All changes saved.	Create Opportunity Page

- After clicking *Create Advertisement Page* from the *Contract Web Form*, you will be redirected to the *that page, which will be the landing page for both Vendors and SFPUC employees from now on.*.
- 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
	12 01 02 03	04 05 00 05 10
	AM 06 07 08 09	10 11 15 20 25
	12 01 02 03	04 05 30 35 40
	PM 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.

SFBid TRAINING 2.2			My SFBid Log
tract List / PUCPRO.0061		Search S	FBid
RA Watershed Maintenance Project (PUC.PRO.0061) 🛛 🖌			
		or Proposals 08/28/15 12:34 AM	
Create Proposal Response Form	Deadline	00/20/13 1234 AM	
SUMMARY DOCUMENTS (0) REQUEST FOR SUBS (0) INTERESTED PARTIES (0) QUESTIONS (0) SUBMITTED PROPOSALS (0) VENDOR	ACTIVITY		
oject Description	Request for Proposal		
ake sure the water gets from the hill to the aqueduct with minimal environmental impact.	Contract Type	Professional Services	
date Description	City Department	San Francisco Public Utilities Commission (SFPUC)	
dates	Division(s)	Water	
	Estimated Cost	\$150,000	
No Updates	Due Date	8/28/2015	
d Update	Due Time	12:34 AM	
rvice Tags:	Contract Duration	180 Days	
-	Advertisement Date	N/A	
nachrizel Engineering Umleape Architecture Saveying (Land & Aerini) Writer Resources Engineering Transportation & Terffic Engineering Concrete Related Services (C-1) estruction Terffic Control Services (C-1) Entheorik & Paring (C-12)	LBE Goal	0%	
	Pre-Submittal Conference		
	Date	7/29/2015	
	Time	12:34 AM	
	Attendance	Not Mandatory	
	Location	525 Golden Gate Ave, San Francisco, 94102	
	RSVPs for Pre-Submittal Conference: 0		
sible on Website? NO 0			
ew Contract Form			

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

SFBi	TRAINING 2.2			Welcome Ken! Account My
Contract List / WW-2621R				Search SFB
Replace Ground	vater Supply Well Stations (WW-2621R)	*		
Create Bid Submissio			Deadline for Bids	07/23/15 02:00 PM
SUMMARY DOCU	MENTS (0) REQUEST FOR SUBS (0) INTERESTED PARTIES	(0) QUESTIONS (0) VENDOR ACTIVITY		
EXISTING				
# Date	Name			
		No results found		
NEW				
# Name		Replaces		Security
		No documents have been added		
Add the first Document				
		Copyright © 2015 San Francisco Public Utilities Commi	ission All Rights Reserved	

- 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 <u>Manage</u> <u>Secure Documents</u> 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.



• To Manage a Proposal Response Form that you began during the workflow, click the green "Manage Proposal Response Form" button located at the top of the Advertisement Page.

SFBid TRAINING 2.2		Welcome Ken! 🚖 🚖 😃 Account My SFBid Log off
Contract List / WW-2621R		Search SFBid
Replace Groundwater Supply Well Stations (WW-2621R)	Deadline for Bids	07/23/15 02:00 PM
Manage Bid Submission Form	Desume for bus	0//23/13 02:00 PM
SUMMARY DOCUMENTS (2) REQUEST FOR SUBS (0) INTERESTED PARTIES (0) QUESTIONS (0) VENDOR ACTIVITY		

- To create a new Proposal Response Form, click the green "Create Proposal Response Form" button located on the top left of the Advertisement Page.
 - o 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.

SFBid TRAINING 2.2		Welcome Ken!	Account My SFBid	Cog o
Contract List / WW-2621R			Search SFBid	
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 VSUBS (0) INTERESTED PARTIES (0) QUESTIONS (0) VENDOR ACTIVIT	Ŷ			
Start with a blank proposal form template				
Cancel	Bid Details			
An ground and a supply wer statutes more than a superior of the state of the art systems designed to last at least 100	Contract Type	Construction Services		
years for the time of installation.	City Department	San Francisco Public Utilities Commission (SFPUC)		
pdate Description	Division(s)	Water		
Ipdates	Estimated Cost	\$1,500,001		
No Updates	Due Date	7/23/2015		
no opones	Due Time	2:00 PM		
dd Update	Contract Duration	2 Years		
ervice Tags:	Advertisement Date	N/A		
Civil Engineering Geotechnical Engineering	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 Golde	n Gate Ave, San Francisco,	941
Visible on Website? NO	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.



• Click the blue "Add another section" at the bottom of the page to add additional sections.

[UNTITLED SECTION]		* 0 ×
	Drag a control here to start	
Add another section		

- When you add a new section, you will be prompted to click the pertinent link for:
 - Add New Blank Section
 - o System Templates

- o 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.

×
Cancel

- 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.

	Section Heading	2
	Section Title:	
	Contains Repeating Data 😡	
	Section Icon (Optional) 📦	
_{	■ □ ■ □ ■ □ ■ □ ■ □ ● □ □ ● □ □ ● □ □ ● □ □ ● □ □ ● □ □ ● □ □ ● □ □ ● □ □ ● □ □ ● □ □ ● □ □ ● □ □ ● □ □ □ ● □ □ □ ● □ □	

Sections can be dragged up and down by clicking and holding the navigation icon + at the top left of each blind.
 A tan area will appear where the dragged section will land upon release.

Name	Description	
Files will appear he	re	
+ in INSURANCE INFORMATION		
	*0×	
	Drag a control here to start	
	+ 🗎 [UNTITLED SECTION]	
+ © PREVIOUS WORKS		
	Drag a control here to start	
Move Section using this handle		

FIELDS

• Click to drag the first field into the new blind.

		★ O × Form Fields	
Draa a c	ontrol here to start	Drag and drag fields onto the form on the left Instructions	
Add another section		B Test	
eturn To Opportunity		viview Save Form Date Picker Dropdown Options File Attachment(s)	
		Yes/No Switch	

• Multiple fields can be dragged and dropped into each section or "blind," creating the visible frames between relative information.

• Ask questions, create response forms, request information/documentation and construct agreements using the various fields in the form builder.

Gonstru	ction Services Proposal Form		
+ 0	BUSINESS INFORMATION * 0 ×	Form Fields	
	Use the following fields to provide references, documentation and business/employee information. Note: to be be considered qualified for this contract, you must have a minimum of 2 previous jobs values at over \$200,000 and be approved through the Pre-Qualification PQ-1500 (pool date valid January 2015- many 2016), and m good standing with the SFPUC. Prime Vendor Business Name	Drag and drag fields onto the form on the left.	
	An engineers with the City and County of San Francisco and/or State of California.	Checkbox Multiple Choice Date Picker Dropdown Options	
	Are you submitting this proposal as Joint Venture (VV)? NO	File Attachment(s) Yes/No Switch Custom Table Show Custom Centrols	
÷	Employee/Sub-Contractor Name Employee/Sub-Contractor FEIN (if not applicable, note "n/a") Criminal Background on file/ Cleared for Secure document Andling with SFPUC?		
	Table content will appear here ViWe are Pre-Qualified through the PQ-1500 Byou dir not submit and receive certification for this Pre-Qualification, you are unable to bid on this contract.		
	PQ-1500 Certification Document Pesse upoad your PQ-1500 certificate here for verification. Name Description		
	Files will appear here		
+ h	IUNTILED SECTION) * 0 ×		
	Drag a control here to start		

- 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.
 - \circ ~ 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
 - \circ Validation
 - Email
 - Phone
 - Dollar Amount
 - Default Value

Help Text As registered with the City and County of San Francisco and/or State of California. Advanced Properties Image: County of San Francisco and/or State of California. Max Length (Characters with space) 100 Required? Image: County of San Francisco and/or State of California. Validation Toot Validation Toot Validation Toot * Business License Number Canced * Business License Number Canced * Business License Number Canced Notifiting this proposal as a Joint Venture (M)? Field Title Are you submitting this proposal as a Joint Venture (M)? Field Title If so, please note all JV Partners below Advanced Properties Image: County Co		
Advanced Properties Image: Image	Field Title	Pime Vendor Business Name
Default Value [c] Max Length (Duracters with space) 100 Required Id Validation Te Tead Id * spaces Lenses Lense	Help Text	As registered with the City and County of San Francisco and/or State of California.
Max Length (Characters with space) 100 Required? Image: Character with space) Yead	Advanced Properties	
Registed: Image: Carcer Validation Text Validation Text Image: Carcer OK *Business License Number *Business License Number *Business License Number *Field Title Are you submitting this proposal as a Joint Venture (J/)? Field Title If so, please note all J/ Partners below Advanced Properties Image: Annotation of the proposal as a Joint Venture (J/)? Show Reason on No Image: Annotation of the properties of the p	Default Value	
Number Cancel OK *Business License Number <td>Max Length (Characters with spaces)</td> <td>100</td>	Max Length (Characters with spaces)	100
Cancel OK *Business License Number * *Business License Number * * * <	Required?	\mathfrak{C}
*Basiness License Number Field Title Are you submiting this proposal as a Joint Venture (JA)? Help Text If so, please note all JA Partners below Advanced Properties No Show Reason on Yes Image: Show Reason on Yes Show Reason on Yes Image: Show Reason on Yes Column C	Validation	Text
Field Title Are you submitting this proposal as a Joint Venture (JAT)? Help Text If so, please note all JA Partners below Advanced Properties Image: Source All Sour		Cancel OK
Field Title Are you submitting this proposal as a Joint Venture (JAT)? Help Text If so, please note all JA Partners below Advanced Properties Image: Source All Sour		
Help Text If so, please note all JV Partners below Advanced Poperties Image: Solar So	*Business License Number	
Help Text If so, please note all JV Partners below Advanced Poperties Image: Solar So		
Help Text If so, please note all JV Partners below Advanced Poperties Image: Solar So		
Advanced Properties No Default Value No Show Reason on Yes Image: Show Reason on Yes Reason Root Image: Show Reason No Default Reason Image: Show Reason Root Reason Root Image: Show Reason Root Message when No Image: Show Root	Field Title	Are you submitting this proposal as a Joint Venture (JV)?
Default Value ND Show Rasson on Yes Image: Comparison on Yes Show Rasson on Yes Image: Comparison on Yes Show Rasson on Yes Image: Comparison on Yes Rasson Text Image: Comparison on Yes Rasson Rax (angth) Image: Comparison on Yes Rasson Rax (angth) Image: Comparison on Yes Rasson Rax (angth) Image: Comparison on Yes Message when Yes Image: Comparison on Yes Message when No Image: Comparison on Yes	Help Text	If so, please note all JV Partners below
Show Reason on Yes Image: Comparison on Yes Show Reason on No Image: Comparison on Yes Reason Text Image: Comparison on Yes Default Reason Image: Comparison on Yes Reason	Advanced Properties	
Answerstein Reso Braken Reso Reson Text Default Reson Reson Required? C500 Reson Required? Message when No	Default Value	NO
Answired Basin Ted Default Reson Reson Required? O Message when Yes Message when No	Show Reason on Yes	2
Default Resson Image: Comparison of the comparison of	Show Reason on No	
Reason Max Length 250 Reason Required? Message when Yes Message when No	Reason Text	
Reason Required? Image: Imag	Default Reason	
Message when Yes	Reason Max Length	250
Message when No	Reason Required?	
	Message when Yes	
Cancel OK	Message when No	
		Cancel OK

- 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.
 - $\circ~$ 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 O 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.

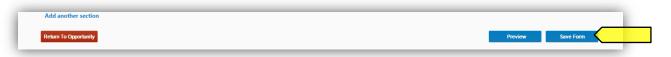
PREVIEW

- 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.
 - o This will help you see where you have missed "required" options, have typos and need to add help text.

	2 1
Return To Opportunity	Preview Save Form
	Copyright © 2015 San Francisco Public Utilities Commission, All Rights Reserved

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.



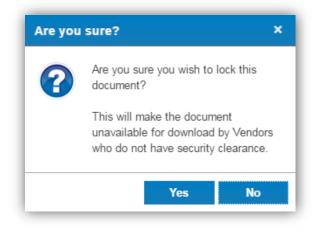
RETURN TO ADVERTISEMENT PAGE

- 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.

Add another section		
Return To Opportunity	Preview Save Fo	m

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.

SUMMARY DOCUMENTS (3) RE	QUEST FOR SUBS (0) INTERESTED PARTIES (0) Q	QUESTIONS (0) VENDORACTIVITY
No vendor users have signed the secure do	uments confidentiality agreement yet.	
SUMMARY DOCUMENTS (3) R	EQUEST FOR SUBS (0) INTERESTED PARTIES (0)	QUESTIONS (0) VENDOR ACTIVITY
1 vendor users signed the secure docume	ts confidentiality agreement for this contract. Click here to	p see the list.

• 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					
Vendor	License #	Date	Section	Shared	
ABC Consulting		06/29/2015	All	0	${igodot}$
				O	ĸ
	Vendor	Vendor License #	Vendor License # Date	Vendor License # Date Section	Vendor License # Date Section Shared

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.

	TS (3) REQUEST FOR SUBS (0) INTERESTED PARTIES (0) QUESTIONS (0)	
ou must agree to the secure o	ocuments Confidentiality Agreement for this contract before you can download secure documents.	
/ Date	Name	Securit
06/29/2015	🖮 c	6
06/29/2015	Construction RFP Document - Secure	â
	Contract for Well Replacement Insurance documents	0

• 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 Secu	ire Documents	
Please read and agree to the	following condition	ns by checking the checkbox below.	
pertaining to City-owned 1 specifications and archive RECIPIENT agrees to hold and shall not be used for a RECIPIENT expressly agree provide to the CITY the ex- must accompany the agree form of US and/or State O electronically-formatted or DOCUMENT RECIPIENT. EI B) A Prime Contractor is all	facilities as describ d documents, in bo the above-describ- any other purpose es to treat such doo ecuted original of ement. In addition, Micial picture ident opies of complete exceptions: a) A Prin Ilowed to provide s	ed confidential information in trust and confidence and agr or be disclosed to any third party. 2. By accepting and using cuments in strict confidence. 3. To receive confidential docu this Agreement. A copy faxed or otherwise will not suffice. <i>i</i> , the individual receiving the documents must provide a val ification card. 4. Copies, reproductions, or alterations in any and/or any portions of DOCUMENTS, shall not be made or ne Contractor may provide sections of the DOCUMENTS or	elease of confidential documents (including all plans and ig mutually-agreed upon terms and conditions: 1. DOCUMENT rees that it shall be used only for improvements to City facilities g the above-described confidential information, DOCUMENT uments on behalf of a potential bidder, an individual must A business card and the Contractor/Business license number lid United States of America (US) State driver's license or other y form, including but not limited to paper copies and retained for distribution to any person or entity by the hy to internal staff with direct involvement in bid preparation or opplier in order to solicit a bid/quote, but only after the Prime
Contractor	•	License Number *	123456789
☑ I have read the above c	confidentiality agre	ement and agree to all the terms	Confirmed 06/29/2015 04:25 pm

• 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

	ement confirmed 06/29/2015. <u>Report secure document distribution to subs/suppliers</u> .	
Date	Name	Security
06/29/2015	🖻 c	6
06/29/2015	Construction RFP Document - Secure	a
06/29/2015	Contract for Well Replacement Insurance documents	Con la construcción de la constr

- 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).

Use this form if you distribute copies of secure bid documents to subs/suppliers				
Representative Name * Sub/Supplier *	License # *	Section of Document Distributed *	Date *	
Add the first sub/supplier				
/iew Confidentiality Agreement				

MAKE THE RFP ADVERTISEMENT PAGE VISIBLE TO THE PUBLIC

- To make the RFP Advertisement Page 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"

Replace Groundwater Supply Well Stations (WW-2621R) 👷	Deadline fo	or Bids 07/23/15 02:00 PM
SUMMARY DOCUMENTS (8) REQUEST FOR SUBS (8) INTERESTED PARTIES (8) QUESTIONS (8) VENDOR ACTIVITY		
oject Description	Bid Details	
Il 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	Contract Type	Construction Services
stallation.	City Department	San Francisco Public Utilities Commission (SFPUC)
dates	Division(s)	Water
	Estimated Cost	\$1,500,001
Vo Updates	Due Date	7/23/2015
Update	Due Time	2:00 PM
vice Tags:	Contract Duration	2 Years
Engineering Geotechnikal Engineering	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
telbe on Wetsinet	RSVPs for Pre-Bid Conference: 0	
	Public Utilities Commission, All Rights Reserved	
	Aublic Utilities Commission, All Rights Reserved	

• 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.

.

- Information on the RFP Advertisement Page is editable; however depending on what it is, the window of being able to do this may vary.
 - 1. Available for updates always.
 - Deadline for Bid Submissions (time)
 - "Updates"
 - 2. Only available to update until the Contract is made visible on the website.
 - Project Description
 - 3. 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 is has been made visible on the website.

UPDATES

- "Updates" can be added to the Contract Opportunity at any time, whether or not is 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.

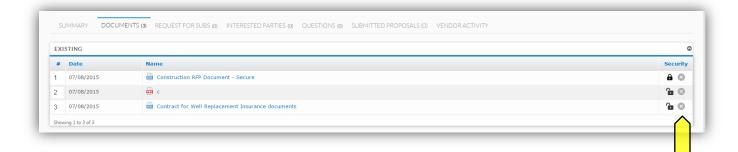
Update Description Updates No Updates Add Update Service Tags:		Project Description BUILD PLANTER BOXES TO SCREEN PUMP STATION FROM THE VIEW OF THE LOCAL RESIDENTS.
Add Update		Update Description
Add Update	ble on Website?	
		No Updates
Service Tags:		Add Update
		Service Tags:

	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
Visible on Website? YES	No Updates
	Add Update
	Service Tags:
	Civil Engineering Geotachnical Engineering

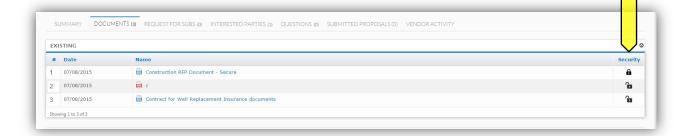
DOCUMENTS

- Until the RFP Advertisement has been made public, you are able to add, edit and remove documents at will.
- Once a RFP Advertisement 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:



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



- 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).

	SFBid	SFBid Tuesday, June 30, 2015
Hel	o Ken SFBid,	
You	have an action item in SFBid:	
•	Review Question	
0	"What is the minimum liability insurance for this contra	ct?"
6	Replace Groundwater Supply Well Stations WW-2621R San Francisco Public Utilities Commission (SFPUC)	
Tha	inks,	
SF	Bid (noreply)	
lf yo Plea	are receiving this email because you are the Contract Analyst in SFBid fo u have any questions or need help, please contact Your SFBid Team at <u>a</u> se do not reply to this automated system email address because this inb orward this email to others - the link is unique to you.	<u>415-934-5722</u> or <u>sfbid@sfwater.org</u> .

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

QUESTION DETAILS

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

questions and answers posted	Updated N/A	Question	Deadline: Friday, 07/17/2015	Search Questions	c
UBMIT NEW QUESTION					
UBMITTED QUESTIONS (NOT POSTE					
Question/Answer		6-h	Submitted	User	
Question/Answer		Category	Submitted	User	
	surance for this contract?	Insurance	06/30/2015	CAN	ď
What is the minimum liability in	isurance for this contract?	Insurance	06/30/2015	• CAN	
	isurance for this contract?	Insurance	06/30/2015	CAN	

- This will bring you to the "Question Details" screen. Here you can
 - Change the Question Category
 - o Reformat questions
 - o Answer questions

- o 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

SUMMARY	DOCUMENTS 13	REQUEST FOR SUBS IN	INTERESTED PARTIES (1)	QUESTIONS (4)	VENDORA	CTIVITY		
lo questions and answe	ers posted	Updat	ed N/A		Questio	on Devedline: Friday, 07/17/2015	Search Questions	c
QUESTION DET.	AILS							Back to all
*Category: Insurance								•
Spec. Section:						Paragraph(s):		
Drawing Sheet:						Details:		
Submitted:								
	um liability insurance	for this contract?						
Formatted question								
What is the minii	mum llability insurar	nce for this contract?						
Answer to be post	ted:							
Time Submitted:			06/3	0/2015 9:17 AM		Time Posted:		N
Submitted By:				Kate Long		Email:		sfwatertest⊚gmail.co
Firms				ABC Consulting		Phone:		141565418
FILTS.				ABC COnsulting		Phone.		1+1500+16
Addendum Neede	¢					Post Question Before Answered:		0
Comments								
Comments are not	t required unless send	ling an item rework. Commer	ts entered here will be included	in system emails an	d comment his	tory will be visible to other users in the "commer	nts" section on this form.	
No Action (Save	Only)		🔻 🚽 Email Qu	estion				tave

ASSIGN QUESTIONS TO BE ANSWERED BY OTHERS

- Send the question to be answered by another person on the Contract
 - Use the drop down on the bottom left of the page to select the user
 - \circ \quad Then click save on the bottom right of the page

Post		Save
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 Analyst Manager for Answer		
Mark Duplicate		
Post	Copyright © 2015 San Francisco Public Utilities Commission, All Rights Reserved	
	about help contact	

- Email the question to someone outside the workflow who can provide the relative information.
 - Click the blue Email Question link on the bottom of the page.

Email.Quest: Save	
-----------------------	--

- An email window will pop up with a template, which can be customized by you.
- \circ $\;$ Enter the email address of the person you would like to send the email to.

- When the person responds, they will reply to your Active Directory email, so please check for the answer there and enter the information to post the question as soon as possible.
- 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.

Post	• 🖌 Email Question	Save

POST QUESTION

- To post the answered/reformatted question you can do this two ways:
 - While you are still on the Question Details page, use the same action dropdown on the bottom left of the page and select "Post," then click "Save".

or

- 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.

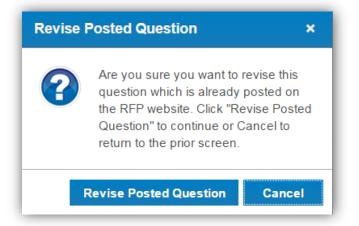
SUBMITTED QUESTIONS (NOT POSTED YET)				0
			Action:	-Select an Action-
Question/Answer expand/collapse all	Category	Submitted	User	-Select an Action No Action (Save Only) Assign to City Attorney for answer
✓ What is the minimum liability insurance for this contract?	Insurance	06/30/2015	● C#	Assign to City Attorney for answer A Assign to CMD Analyst for answer Send to Contract Analyst Manager for Answer
POSTED QUESTIONS AND ANSWERS				Assign to Contract Analyst Manager for Answer Mark Duplicate Post

• Either of these actions will move the question from the *Submitted Questions* blind to the *Posted Questions and Answers* blind.

Questic	n/Answer	Category		Submitted	User		
		No questions					
STED QUE	STIONS AND ANSWERS						
STED QUE	STIONS AND ANSWERS Question/Answer expand/collapse all	Cate	egor y	Submitted	Posted	Popularity	

REVISIONS TO QUESTIONS

- 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"