PROFESSIONAL SERVICES CONTRACT ANALYST

USER MANUAL

SFBid

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.

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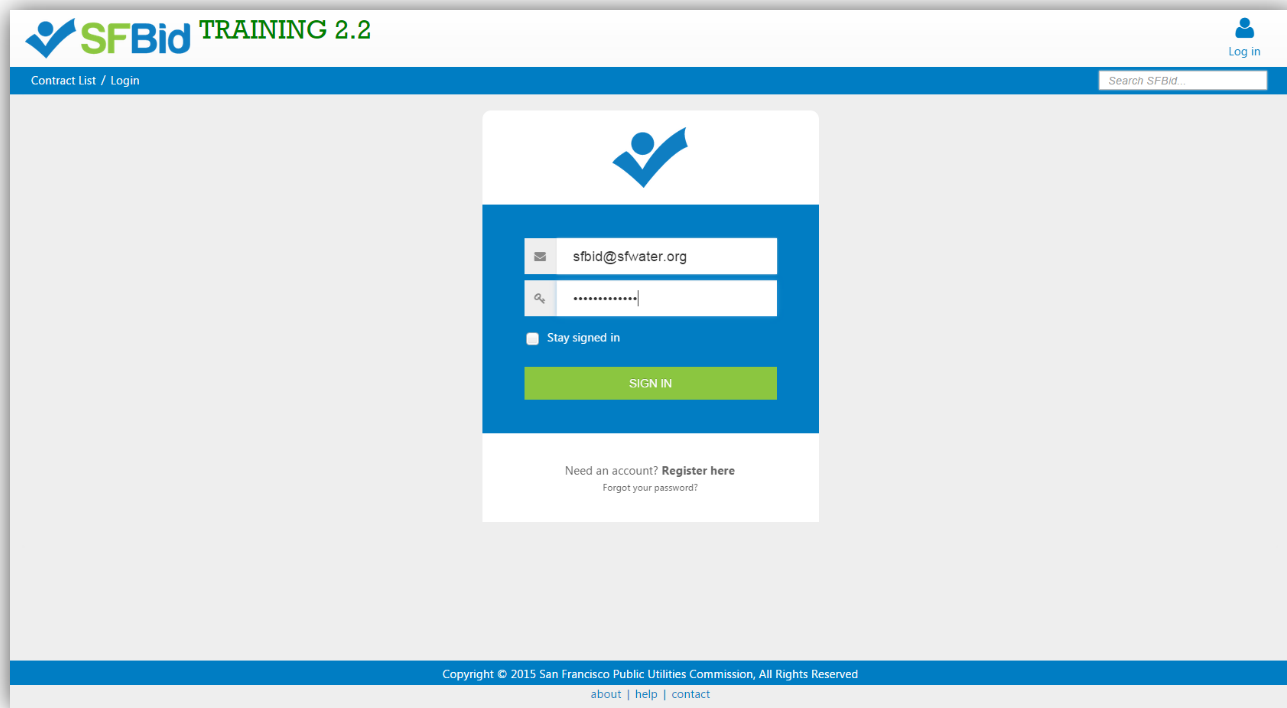
LOG IN

- As a city employee, you are already registered with SFBid.

1. Go to https://sfbid.sfwater.org
2. Click on the blue "log in" icon in the top right corner of the screen.
3. Log in using your @sfwater.org email address (e.g. sfbid@sfwater.org)
4. Enter your password
    - Your password is the same password you use to log in to your computer in the morning.



REQUEST NEW SFBID ACCOUNT ROLE

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

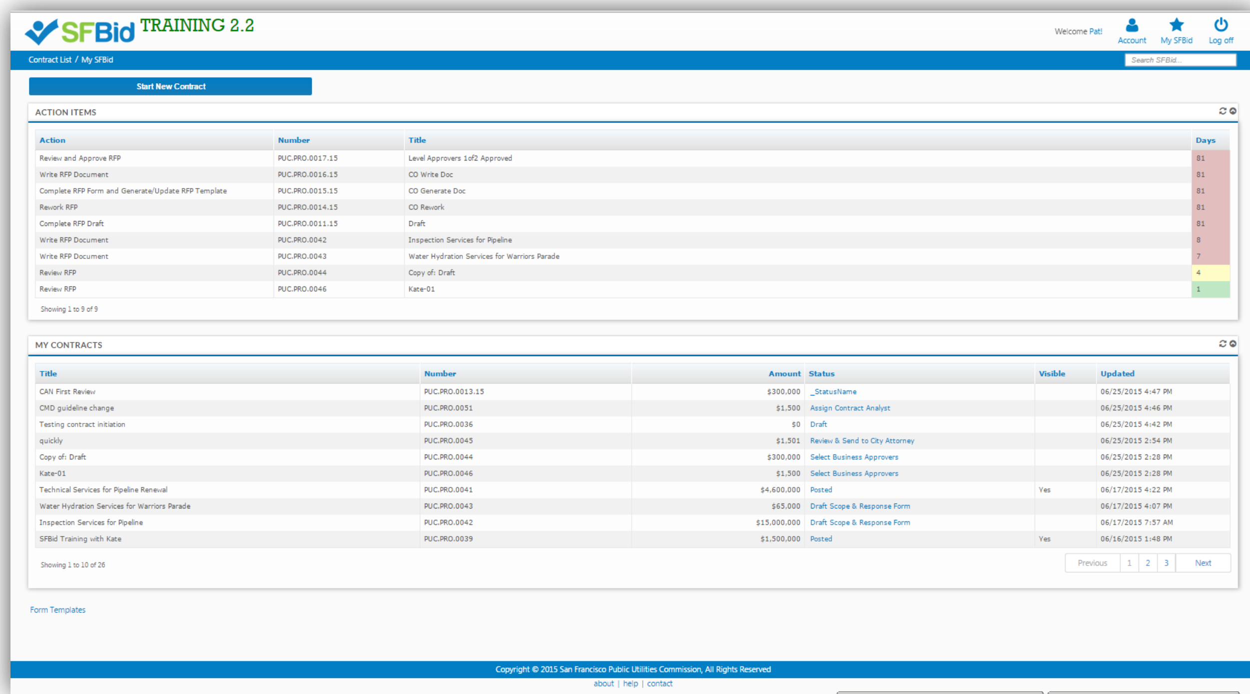
VIEW ACTION ITEMS ON LANDING PAGE

1. Log in to SFBid (see *Log In* section above for instructions)

2. Your landing page upon log in will be your *My SFBid* (to return to this location at any time, click star icon (My SFBid) in the top right corner of the screen).

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

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



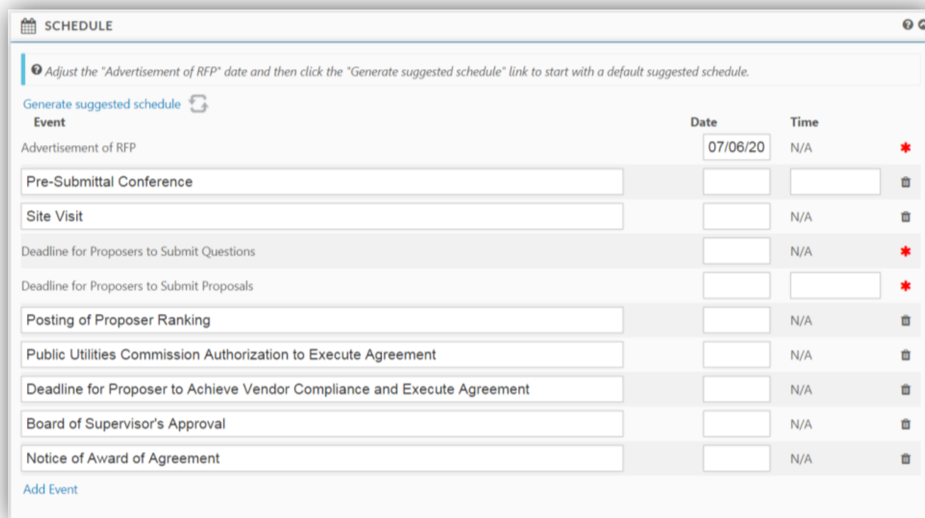
REVIEW RFP AND SELECT TEMPLATES

- *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
  - Basics
  - Labels
  - 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:
  - Schedule
  - 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:
  - 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.
  - 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 icon in the top left of the Schedule blind.



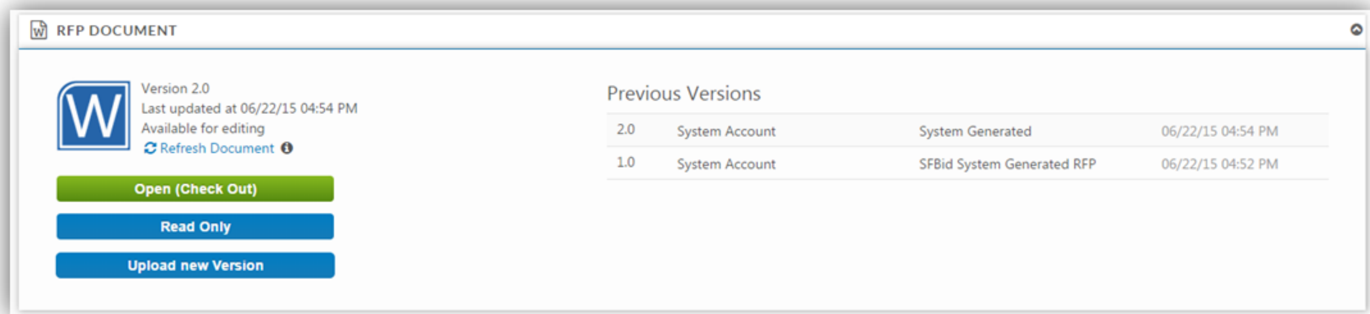
- Enter dates and times as desired for a schedule, or click the blue schedule generator link to have SFBid suggest dates following a typical timeline for RFP Schedules.
- You may remove events which do not apply by clicking the gray trashcan to the right of the event.
    - Note: A red asterisk (*) denotes 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.

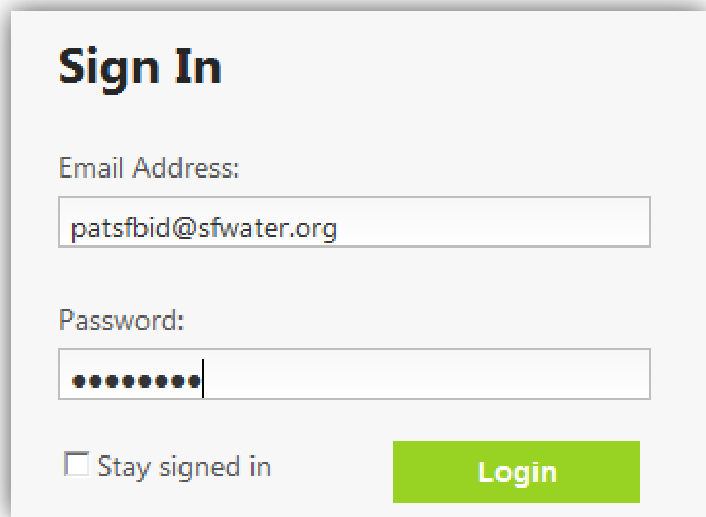
DOCUMENT ACTIONS

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

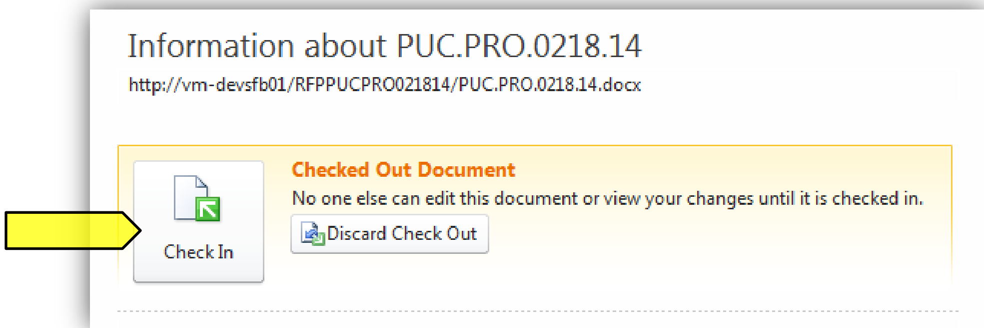


OPEN (CHECK OUT)

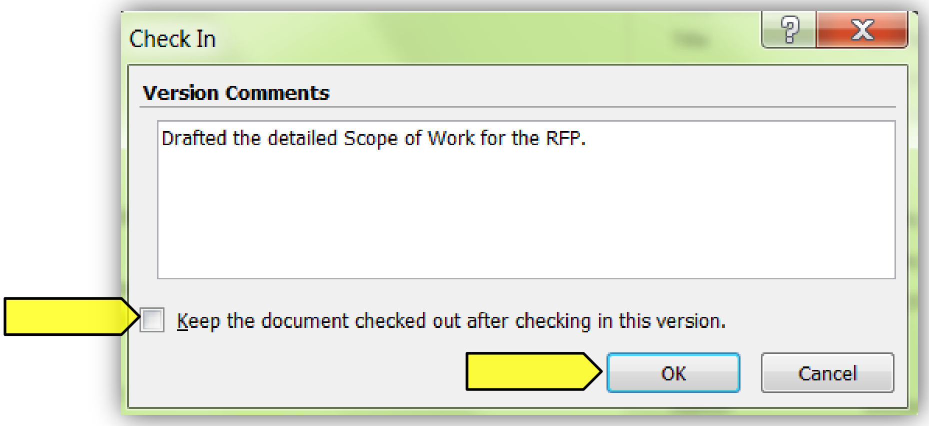
- Clicking on the “Open (Check Out)” link will open the RFP Document from the central SharePoint location.
  - The RFP Document in SharePoint is always the latest version of the document, so the “Check Out” option should be used in almost every case.
- You will need to enter:
  - Your @sfwater email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



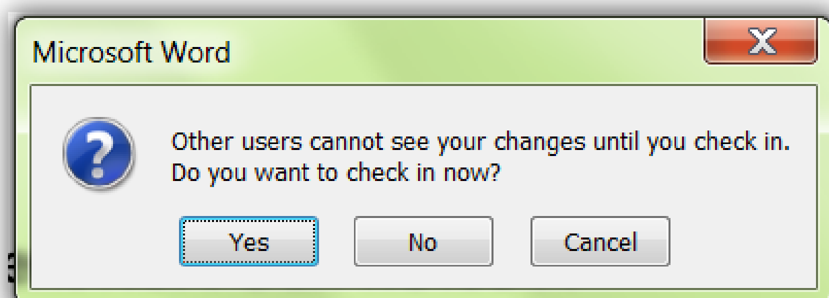
- While you have the document “checked out” for editing, other users can view, but cannot edit the RFP Document. This prevents conflicting changes to the document.
- When you are done editing the RFP Document, you must “Check In” the document to save your changes and allow others to view the RFP Document in SharePoint.
  - Do this by clicking the “File” menu at the top and then pressing the “Check In” button.



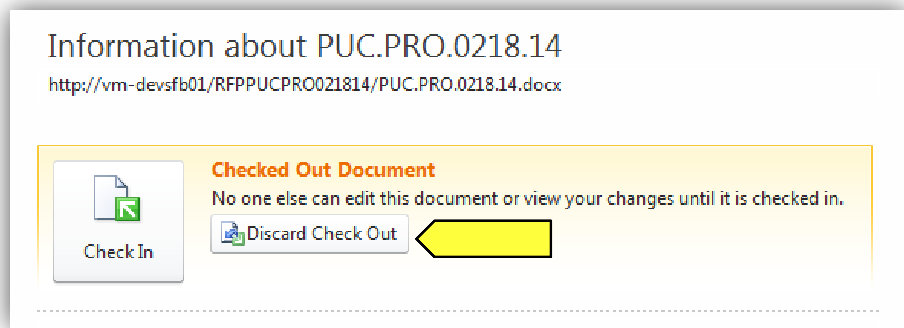
- As you check in the document, you can enter comments to describe the changes saved to this version.
- In order to continue to continue working on the RFP Document after saving changes, check the box for "Keep the document checked out after checking in this version."
  - Checking in the document as 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.



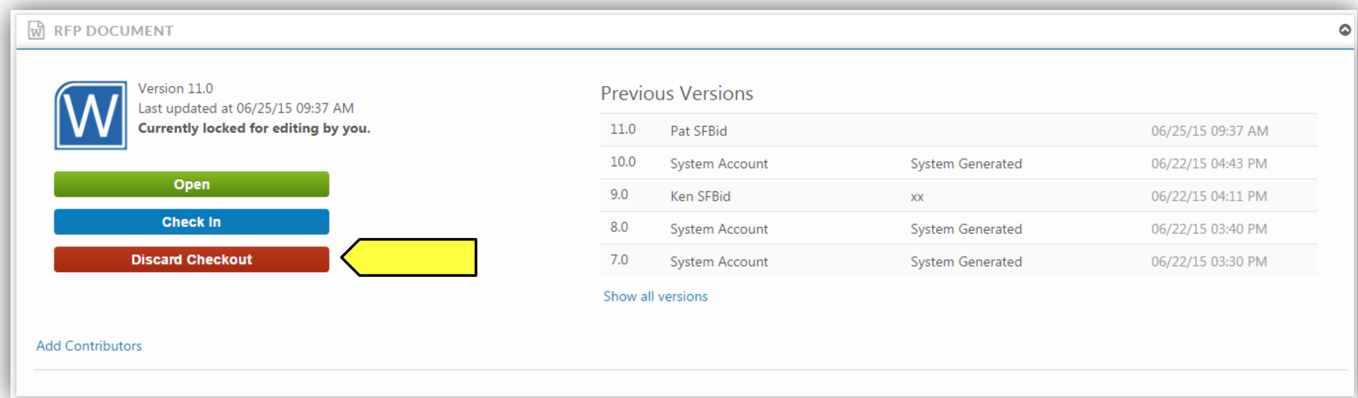
- If you happen to close out the window before checking in the document, you will receive a pop-up prompt asking if you would like to check the document back in. Select "Yes" to check the document in.



- 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



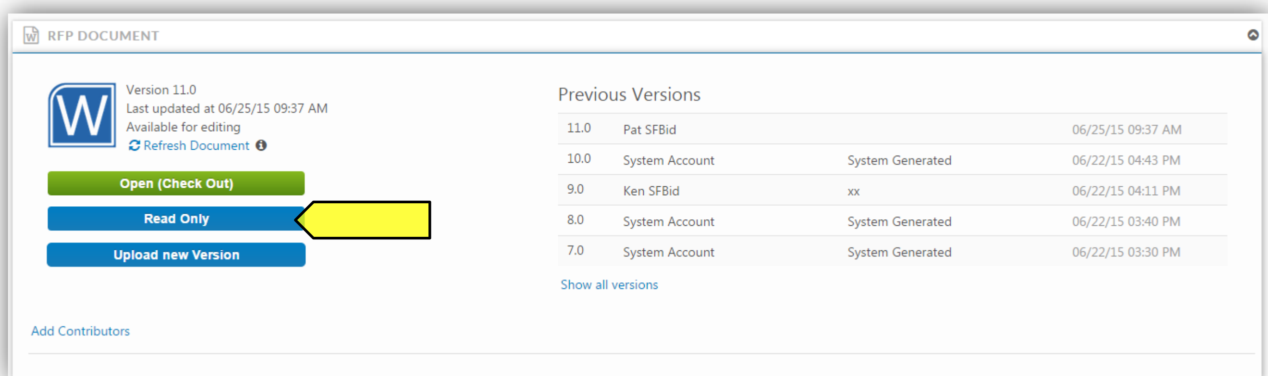
- Do this by closing out the document and clicking on the red “Discard Check Out”



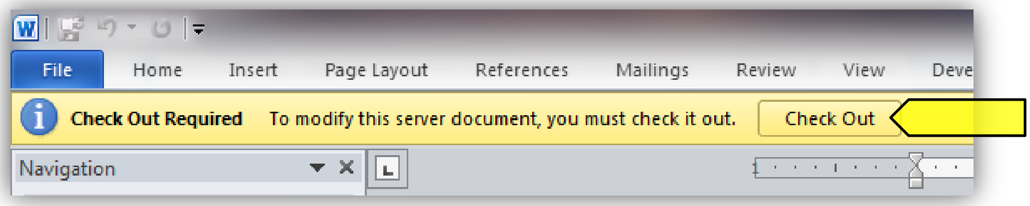
- The Discard Check Out option will remove any changes that you have made to the document and will not be reflected in the “Previous Version History” and comments.

READ ONLY

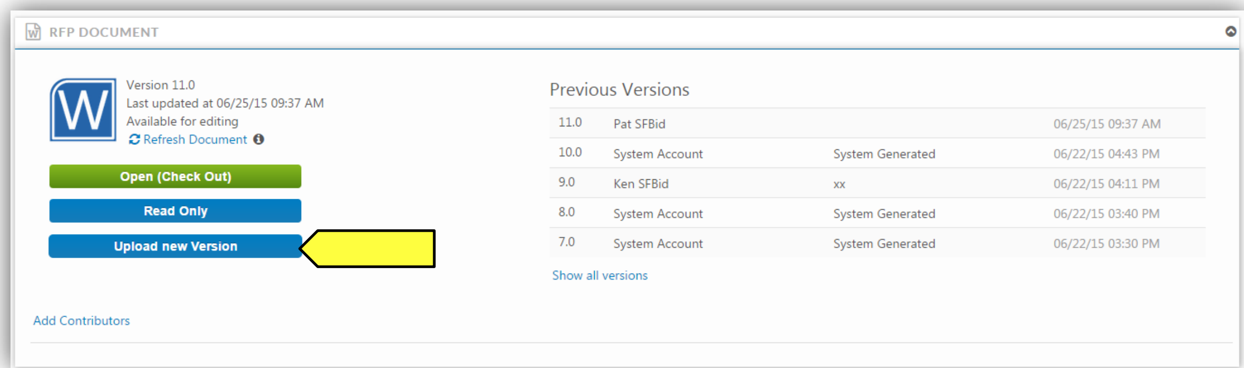
- Clicking this link downloads a local copy of the latest version of the RFP Document to your desktop, but does not include SharePoint integration.



- 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.

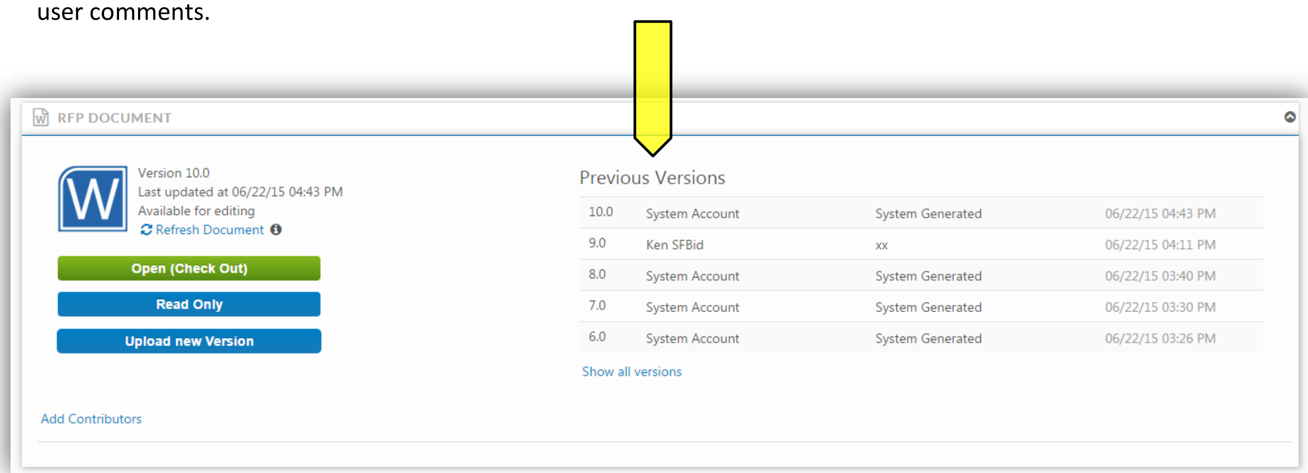


- If you open a read only copy of the document and share it outside of SharePoint, local copies will not be saved in SFBid. Should a more recent version of the document need to be entered into SFBid and is outside of SharePoint, you will need to upload the newest version of the document to the system.
  - 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.



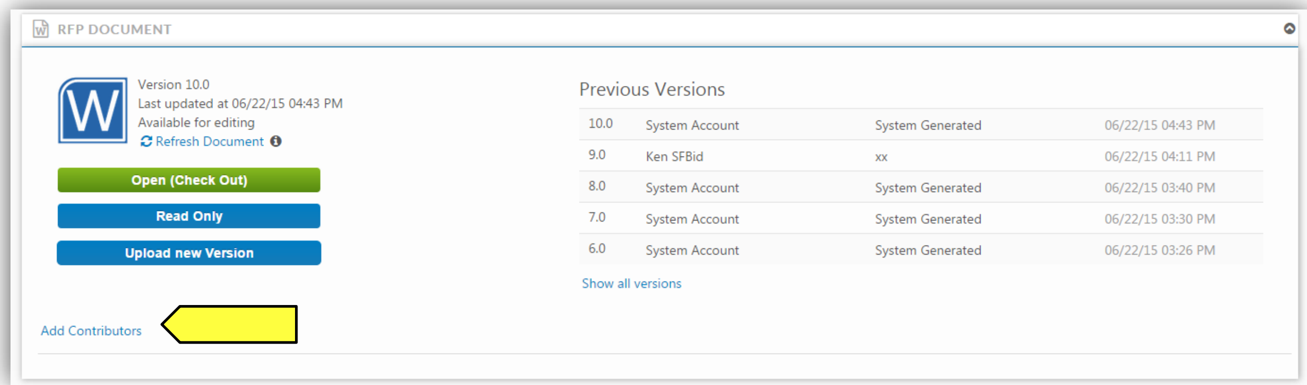
VIEW HISTORY

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

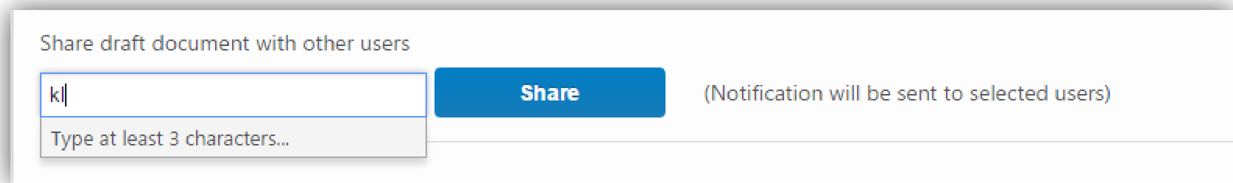


ADD CONTRIBUTORS

- 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.

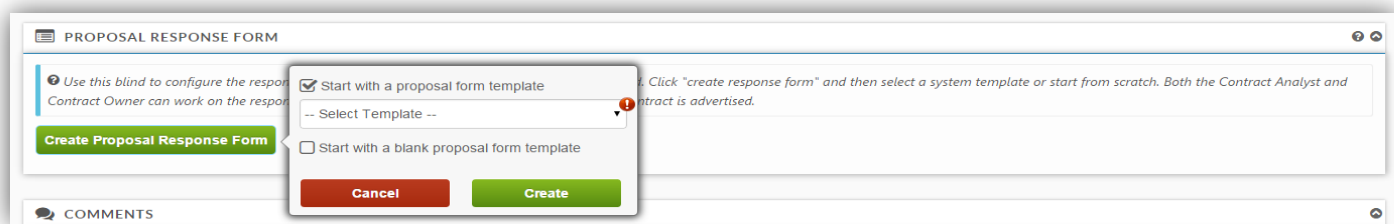


- Select users from the searchable drop-down list and click the "Share" button to send your colleagues an email.



PROPOSAL RESPONSE FORM

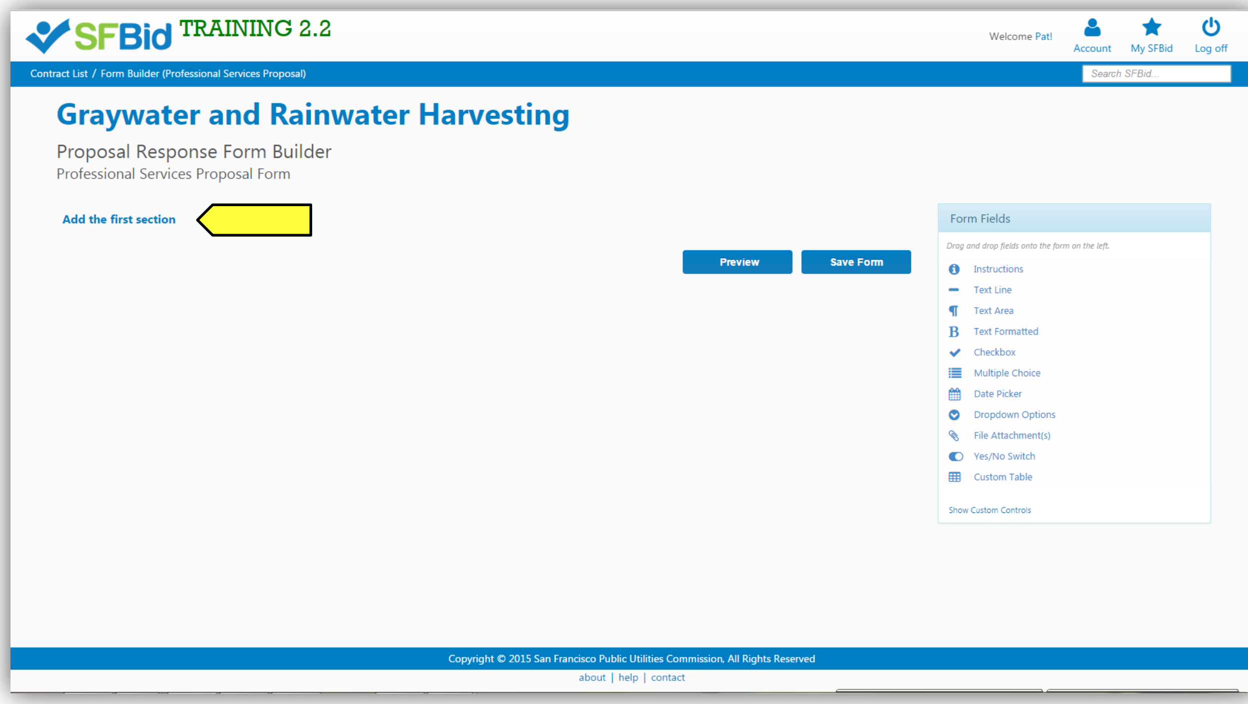
- Click the green *Create Proposal Response Form* button in the *Proposal Response Form* blind to open the form builder and begin framing questions and information/documentation requests you wish to have Vendors respond to as part of your RFP.



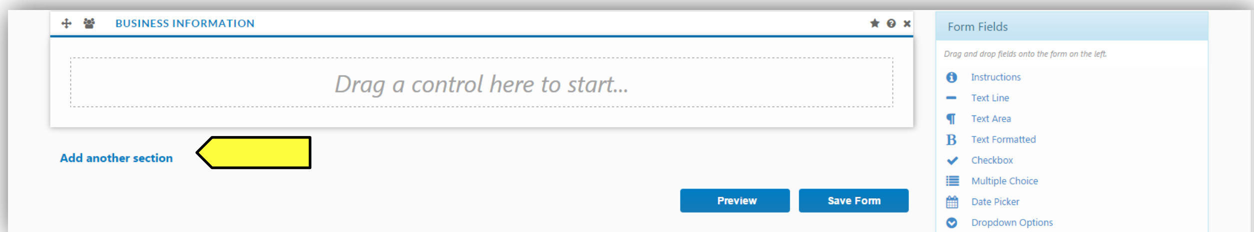
    - Select a template from the dropdown list; or
    - Check the box to start with a new blank Form in which you can create your own inquiries for response.
- These questions will be integrated into the RFP document as you build the form.

SECTIONS

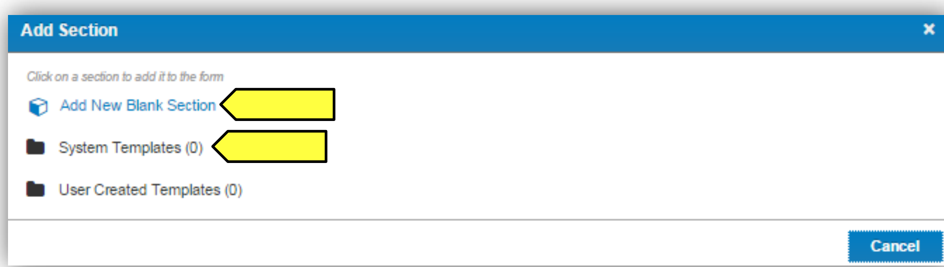
- After you click "Create", you will be taken to the blank page or template of your RFP Response Form.
- Blinds in the Form Builder are called "Sections"
- Click the blue "Add the first section" link on the left to open the first section.



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

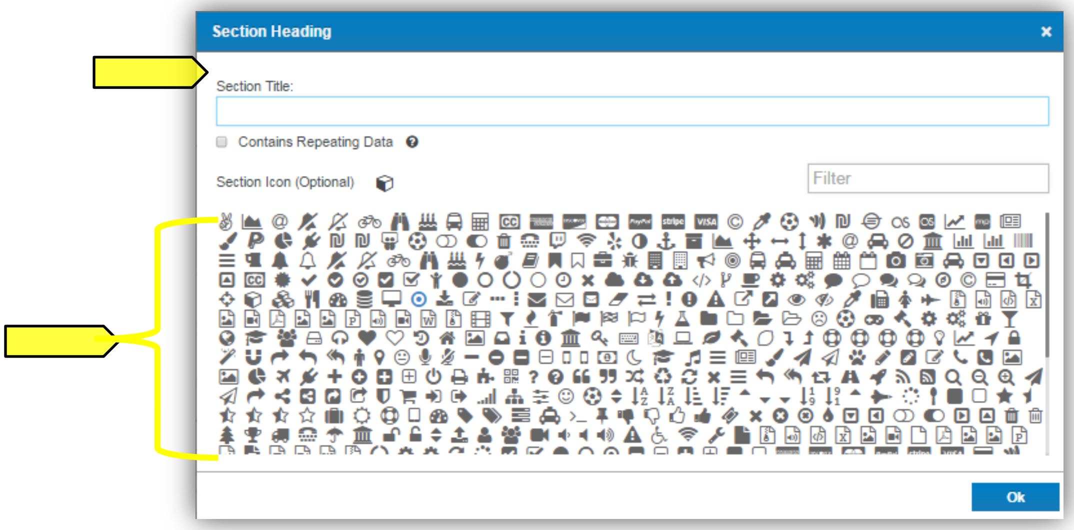


- When you add a new section, you will be prompted to click the pertinent link for:
  - Add New Blank Section
  - System Templates
  - User created Templates
    - Note the blue options are what are available to you; if they appear gray, then there are no available templates in your profile.
    - The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

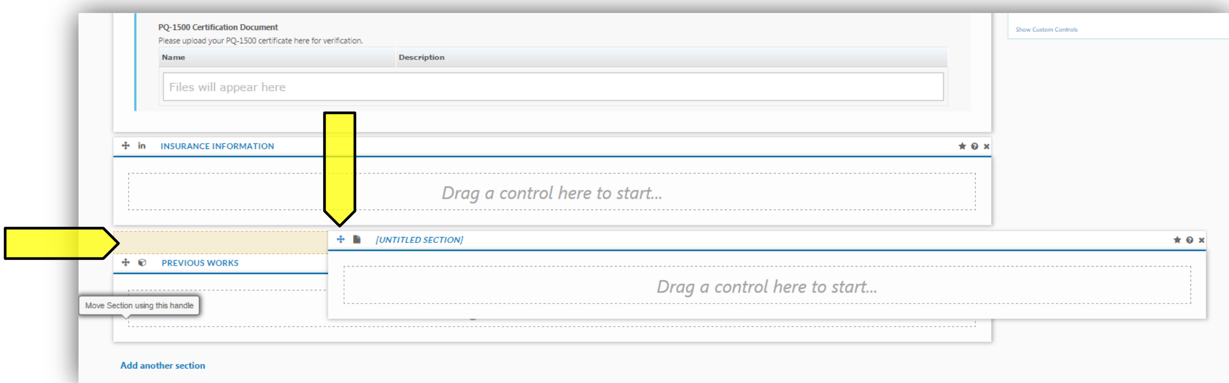


- Type in the name of this section into the "Section Tile" field.
- Select an icon to represent this field (optional; the default icon is a cube).

- Click the blue “OK” button located in the lower right of the window.

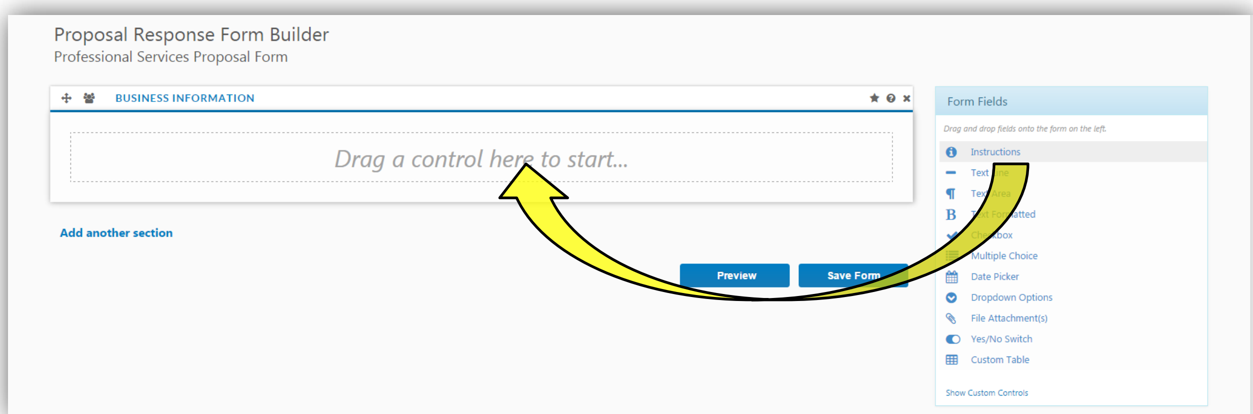


- Sections can be dragged up and down by clicking and holding the navigation icon ✥ at the top left of each blind.
  - A tan area will appear where the dragged section will land upon release.

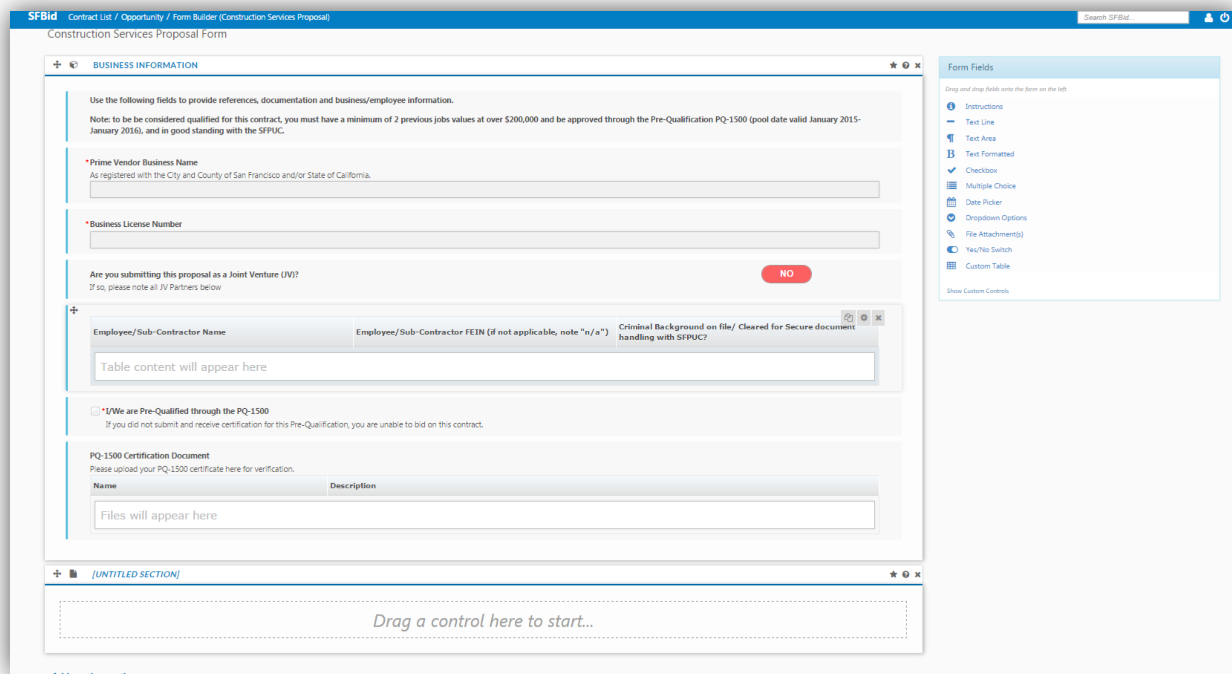


FIELDS

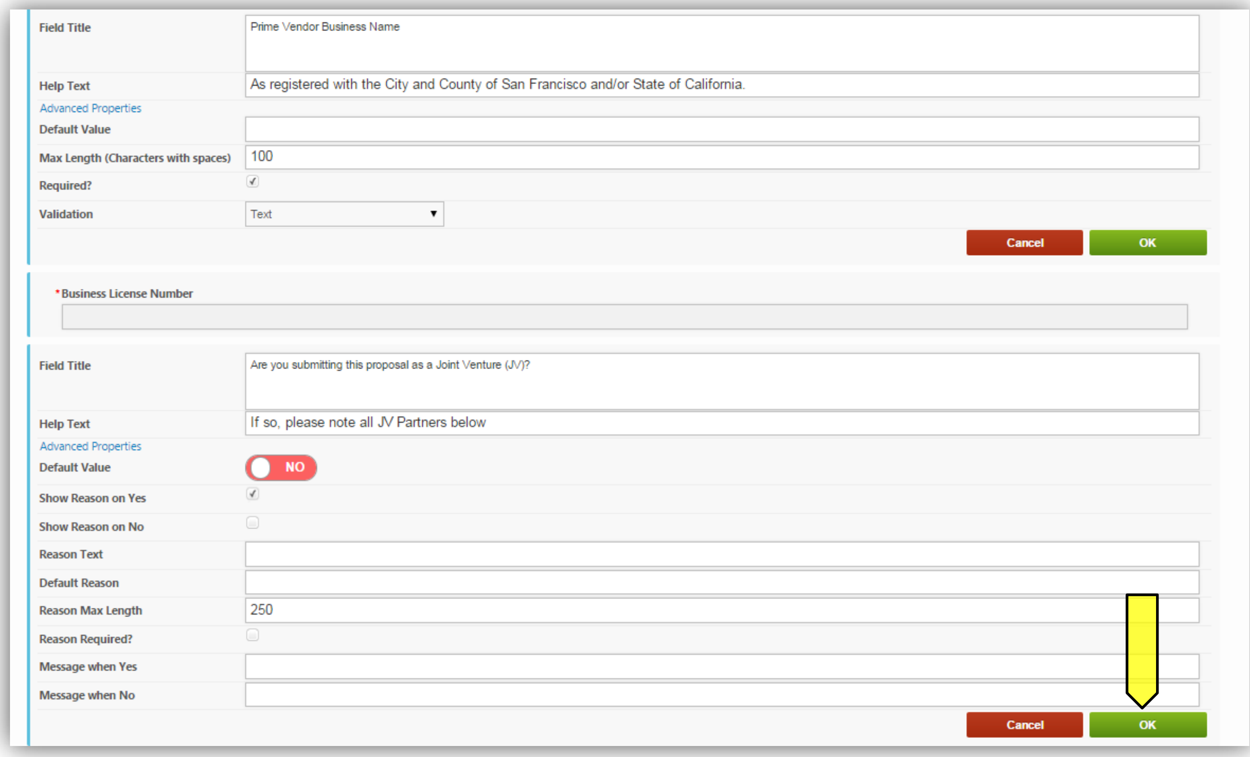
- Click to drag the first field into the new blind.



- 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.



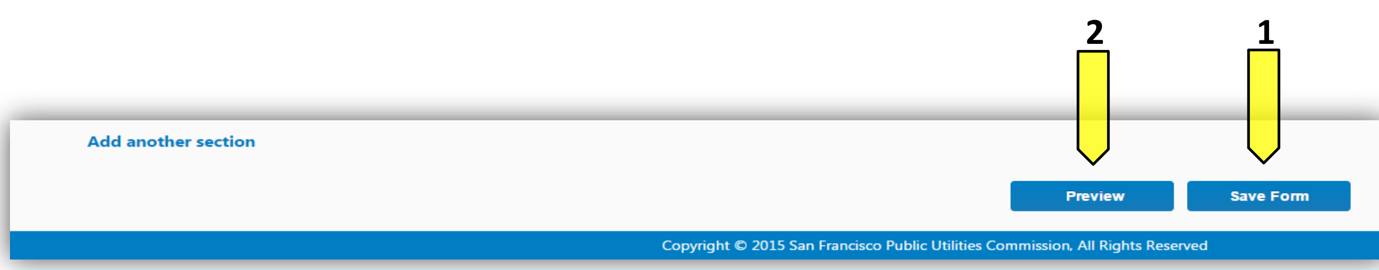
- All fields have a line for *help text* along with the field title/question.
  - With the exception of the Instructions field, since there is no response box to this field directly.
  - Use help text to clarify questions, how questions should be answered, etc.
- For Advanced Options, each field type 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" button, then "Preview."
    - 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

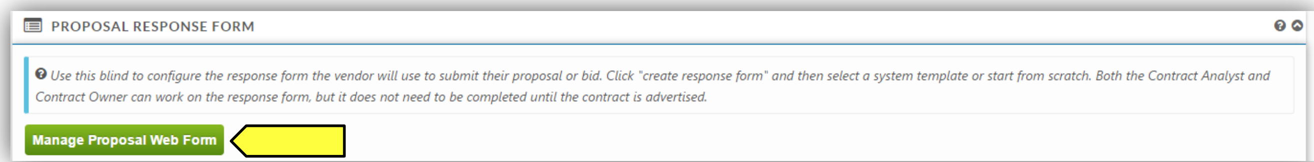
- **As you build the form, be sure to click the “Save” as you go to record the entry/entries or change(s) made. If you need to go back to the opportunity page, log out or wish to preview your form, click save before leaving the form builder page, and again when you have made any reasonable quantity of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

RETURN TO OPPORTUNITY

- To return to the Contract Opportunity landing page, click the 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.

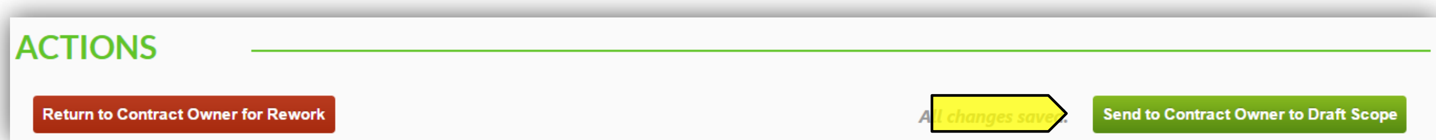


ACTION

- 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:

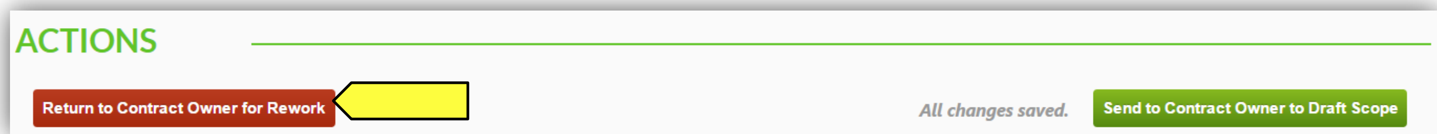
SEND TO CONTRACT OWNER TO DRAFT SCOPE

- 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.

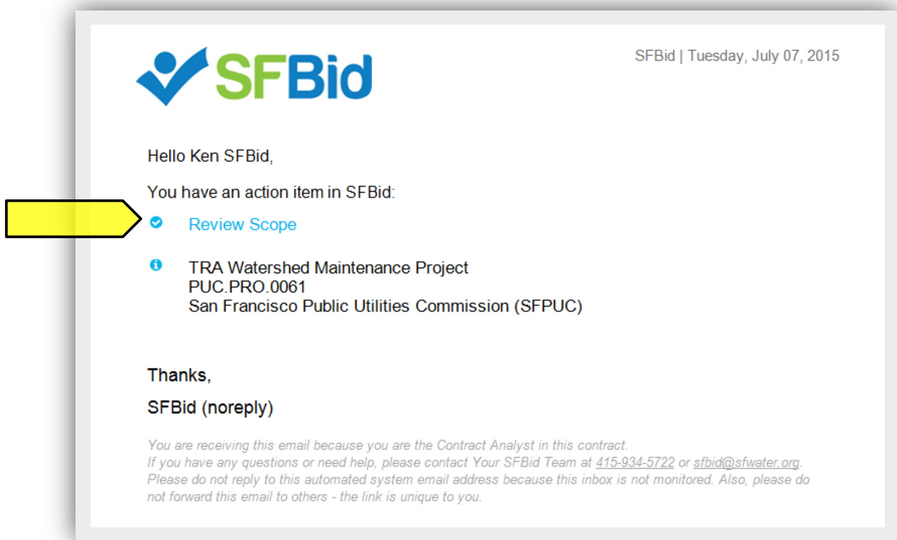


SAVE

- 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.



SFBid | Tuesday, July 07, 2015

Hello Ken SFBid,

You have an action item in SFBid:

- Review Scope
- TRA Watershed Maintenance Project
  PUC.PRO.0061
  San Francisco Public Utilities Commission (SFPUC)

Thanks,

SFBid (noreply)

You are receiving this email because you are the Contract Analyst in this contract.
If you have any questions or need help, please contact Your SFBid Team at 415-934-5722 or sfbid@sfwater.org.
Please do not reply to this automated system email address because this inbox is not monitored. Also, please do not forward this email to others - the link is unique to you.

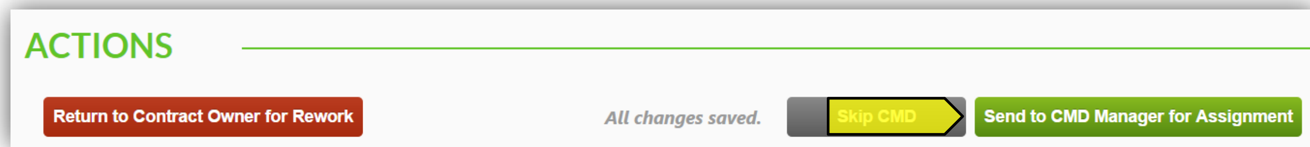
- After logging in to the system, you will arrive at the RFP Web Form page for the specified RFP.
- Review the new information entered by the Contract Owner
  - Task Titles
  - Service Types
  - RFP Document (continued)
  - Proposal Response Form (continued)
- Review any comments made at the bottom of 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
  - Skip CMD
  - Return to Contract Owner for Rework

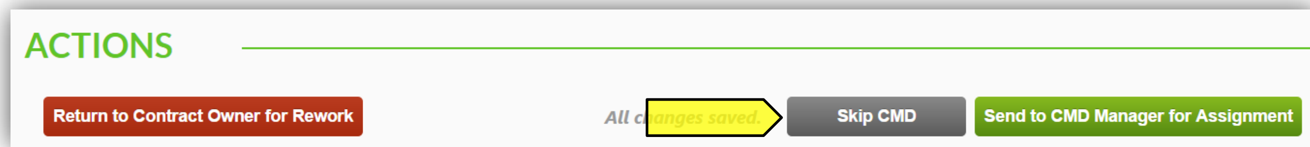
SEND TO CMD MANAGER FOR ASSIGNMENT

- 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.



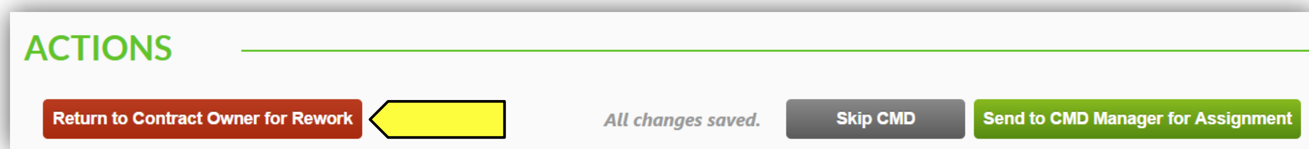
SKIP CMD

- 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.



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.

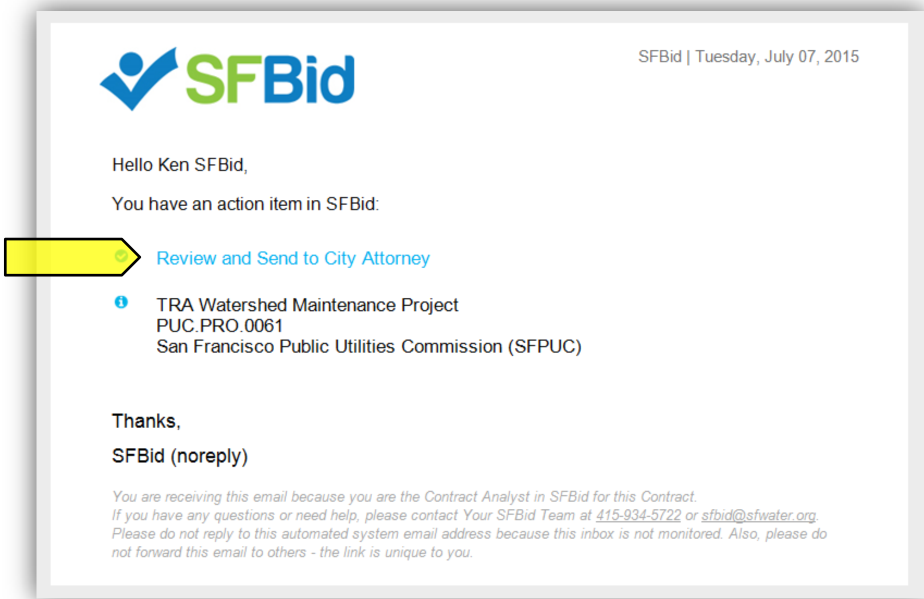


SAVE

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

REVIEW AND SEND TO CITY ATTORNEY

- *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.

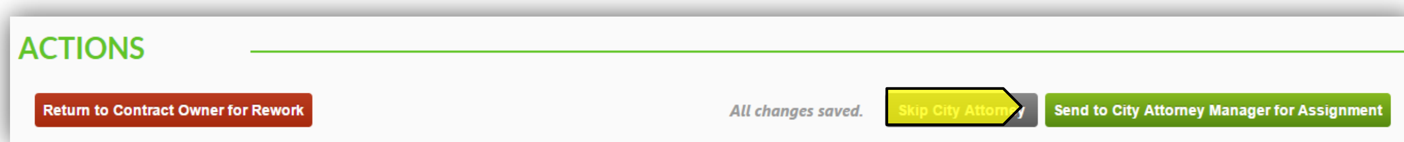


- After logging in to the system, you will arrive at the RFP Web Form page for the specified RFP.
- Review any new information entered by the Contract Owner, CMD or Business Approvers.
- Review any comments made at the bottom of the RFP Web Form.
- Make changes to the form as necessary.
- Continue to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

ACTIONS

SEND TO CITY ATTORNEY MANAGER FOR ASSIGNMENT

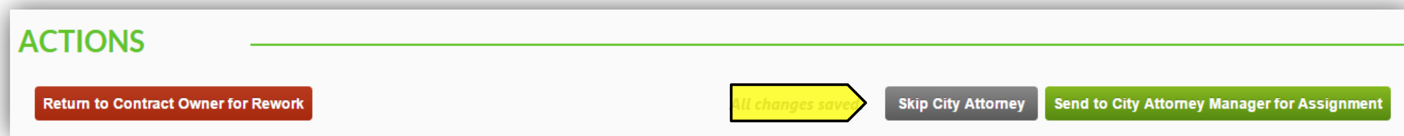
- Clicking this button will submit the RFP Web Form to the assigned City Attorney for their review.
- After the City Attorney has reviewed and approved the RFP, it will move forward in the workflow to your queue for a Final Review.



SKIP CITY ATTORNEY

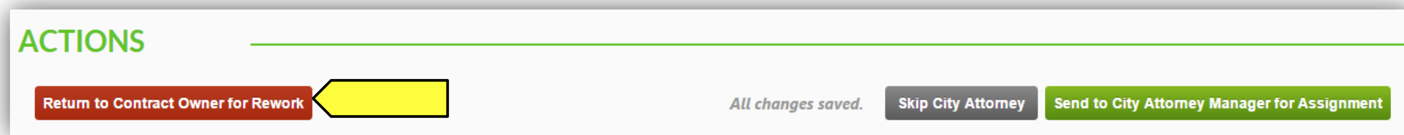
- Click the gray "Skip City Attorney" button, located on the bottom right of the page, if the information in all of the blinds and the RFP Document is complete and input from the City Attorney's office is *not* necessary.

- 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.



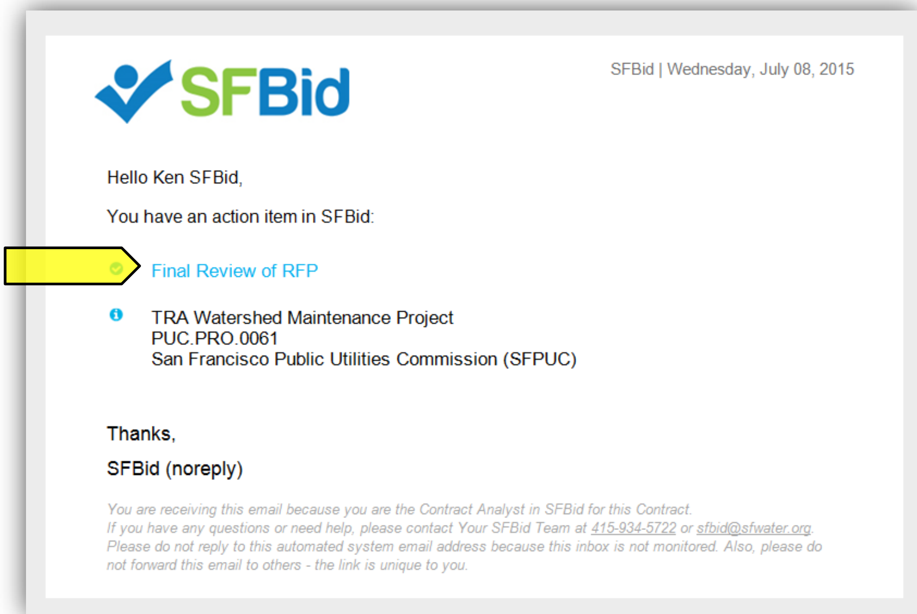
RETURN TO CONTRACT OWNER FOR REWORK

- 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.



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.



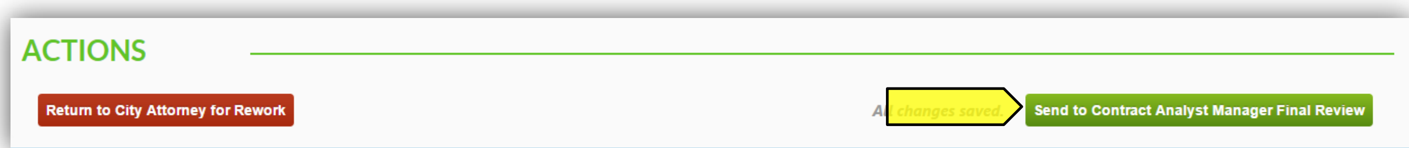
- After logging in to the system, you will arrive at the RFP Web Form page for the specified RFP.
- You have two actions:
  - Send to your manager for final review; or
  - Return to the Contract Owner for rework.
- Review any notes or changes to any of the Proposal Response Form and/or RFP Document.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

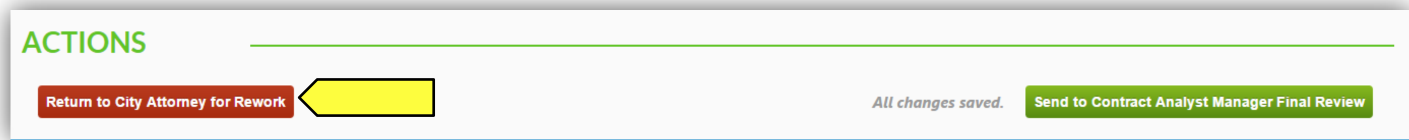
SEND CONTRACT ANALYST MANAGER FOR FINAL REVIEW

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



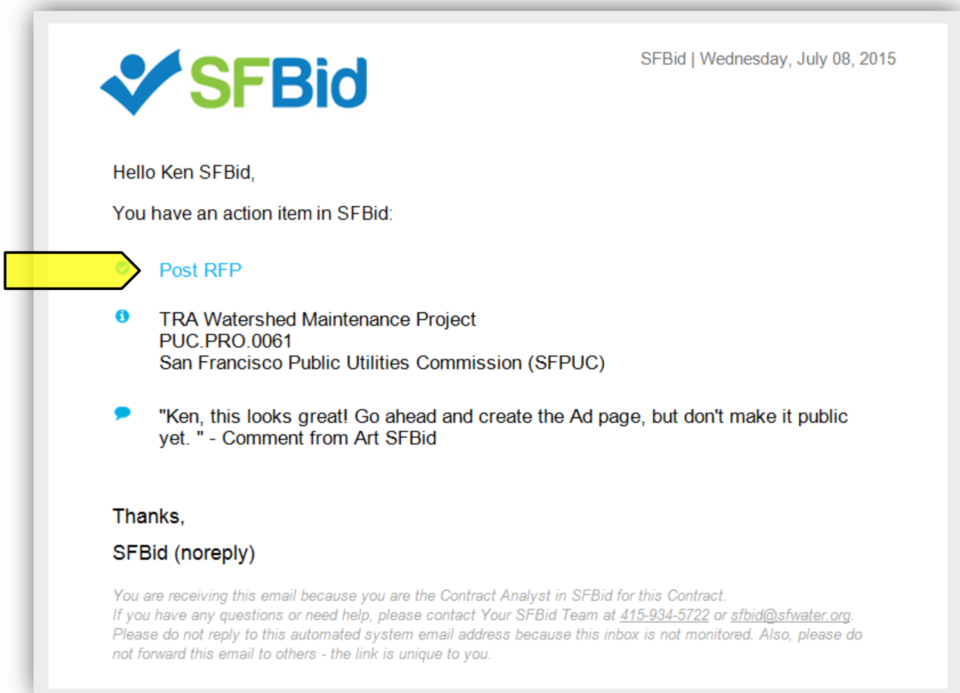
RETURN TO CITY ATTORNEY FOR REWORK

- 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.



POST TO ADVERTISEMENT PAGE

- *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.

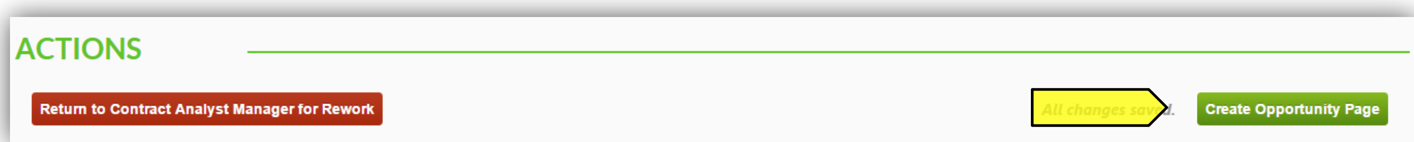


- After logging in to the system, you will arrive at the RFP Web Form page for the specified RFP.
- You have two actions:
  - Post to Advertisement Page; or
  - Return to the Contract Analyst Manager for rework.
- Review any notes or changes to any of the Proposal Response Form and/or RFP Document.
-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

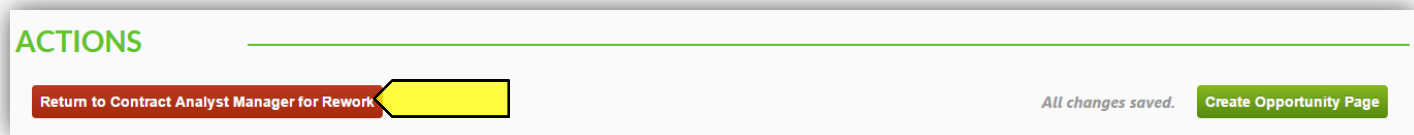


- Once you have click this button, you will be redirected to the Advertisement Page for further work.

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.

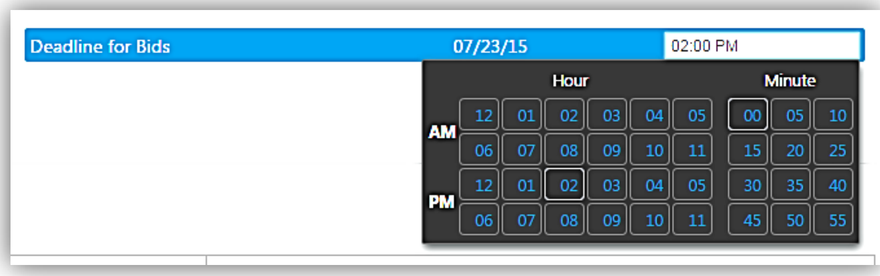
RETURN TO CONTRACT ANALYST MANAGER FOR REWORK

- 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.



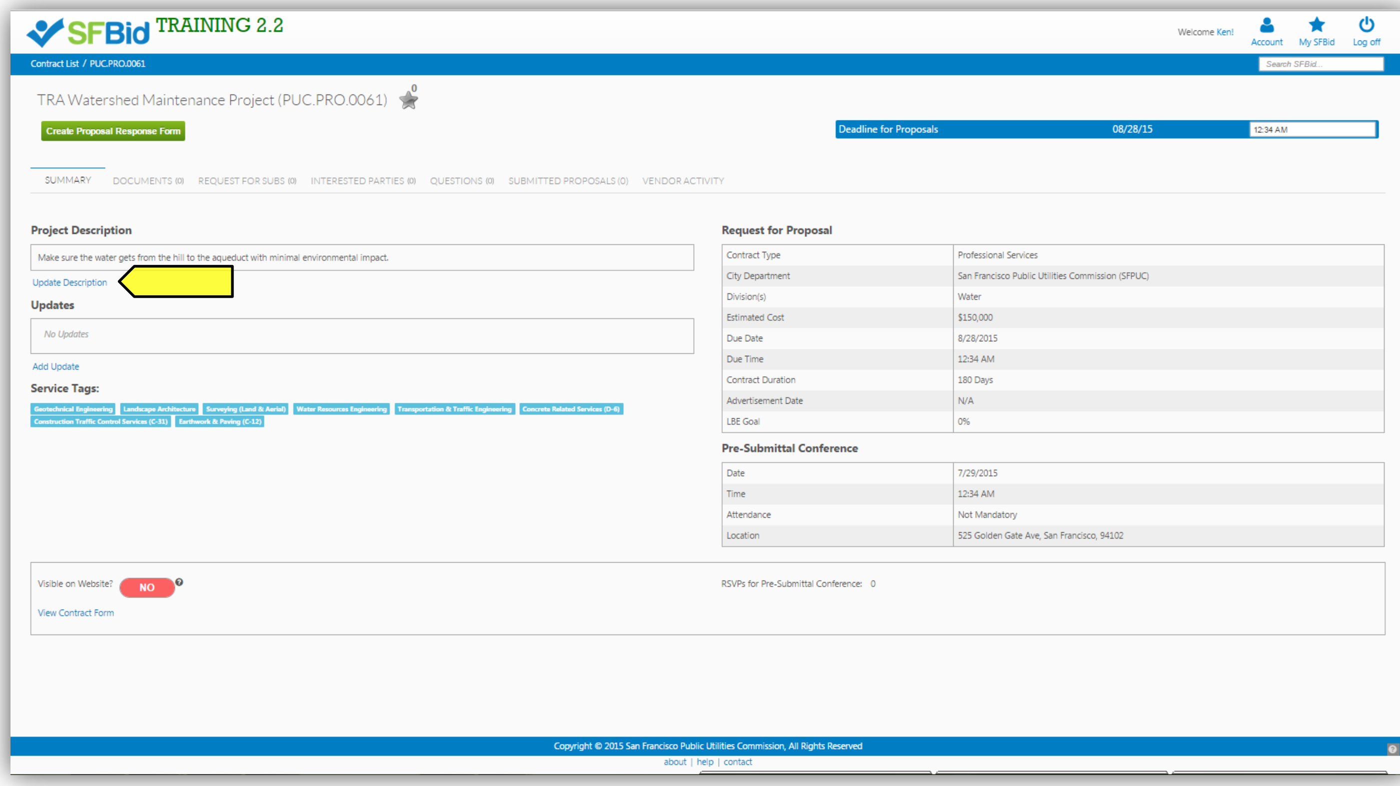
- After clicking *Create Advertisement Page* from the *Contract Web Form*, you will be redirected to the *that page, which will be the landing page for both Vendors and SFPUC employees from now on.* .

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



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

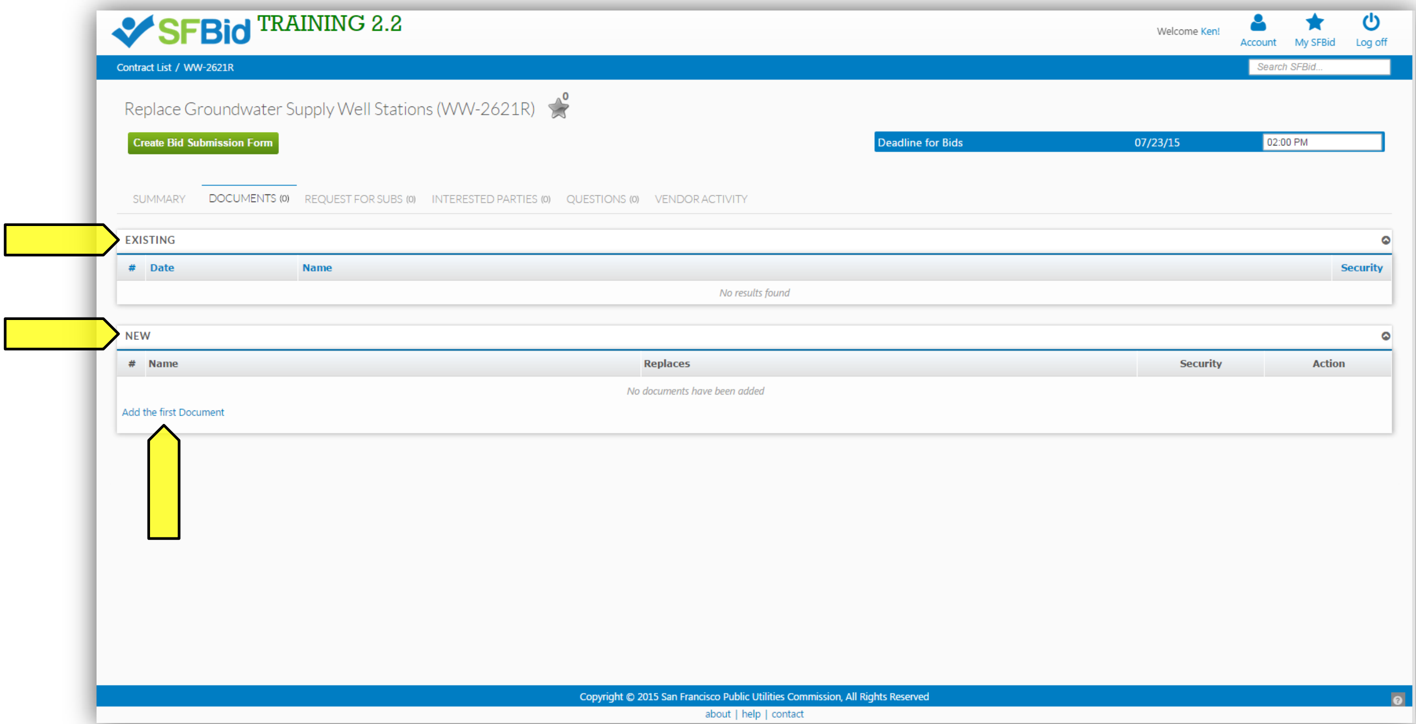
   - If need be, you can update the *Project Description* with details about the project.



UPLOAD DOCUMENTS TO CONTRACT OPPORTUNITY

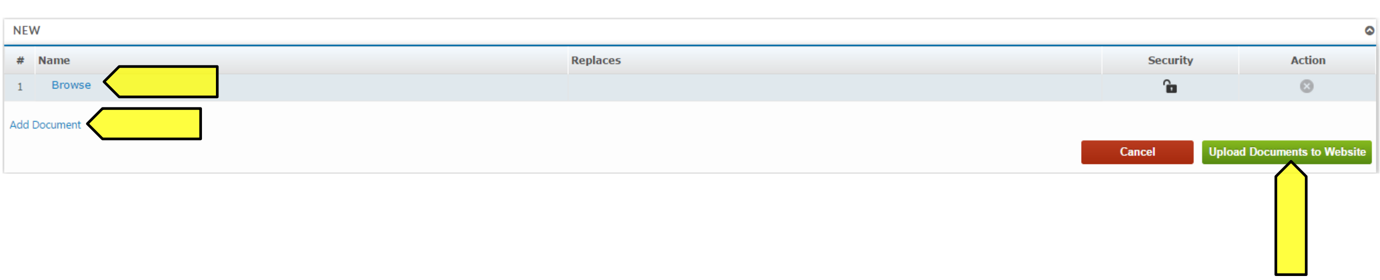
1. From the *Contract Opportunity*, click on the *Documents* tab.

    - On this tab, you can see two sections: *Existing* and *New*



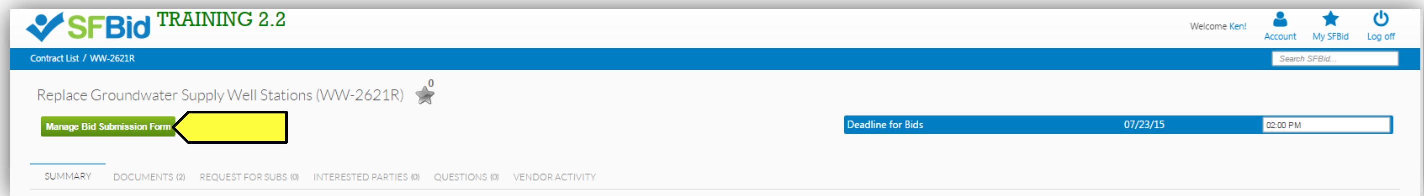
2. Click the "*Add the first Document"* link in the *New* blind to browse on your computer to select the file(s) you want to upload. When you are ready, click the green *Upload Documents to Website* button.

    - 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.

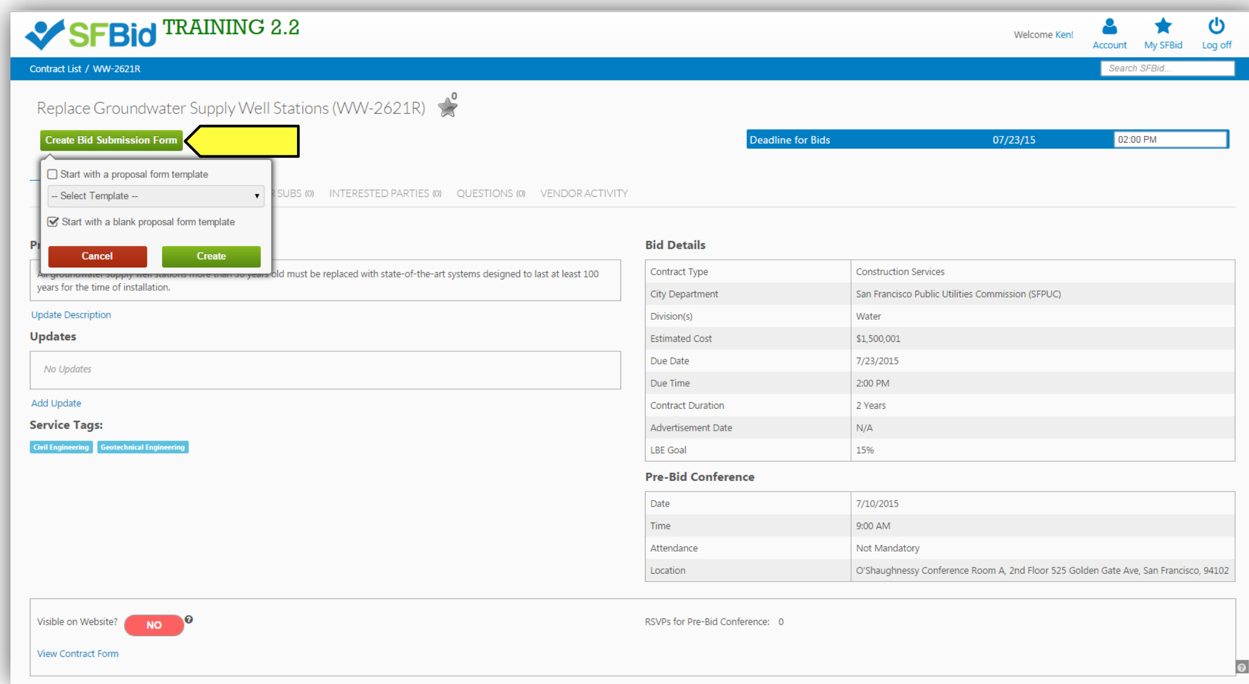


MANAGE/CREATE PROPOSAL RESPONSE FORM

- 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.

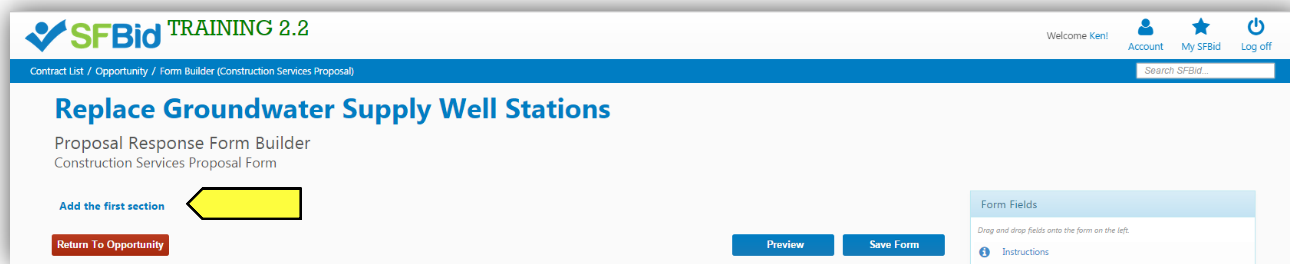


- To create a new Proposal Response Form, click the green “Create Proposal Response Form” button located on the top left of the Advertisement Page.
    - Check the box to begin with a blank template or to use an existing system template.
    - Click the green “Create” button to generate the form builder.

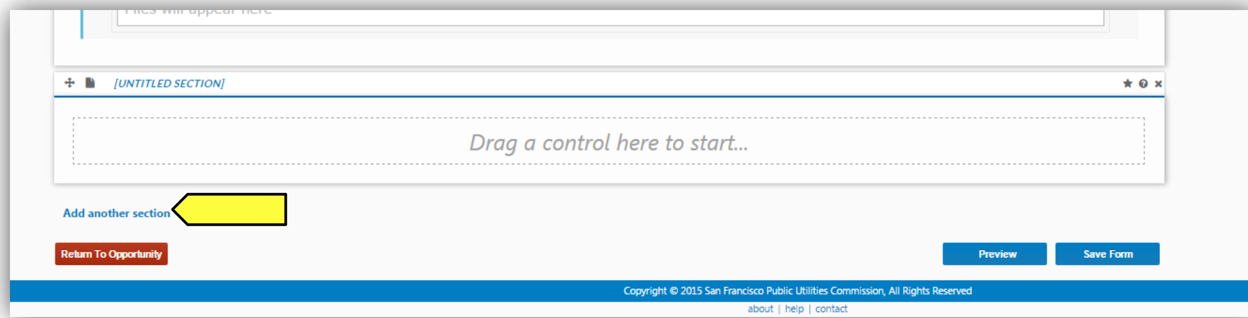


SECTIONS

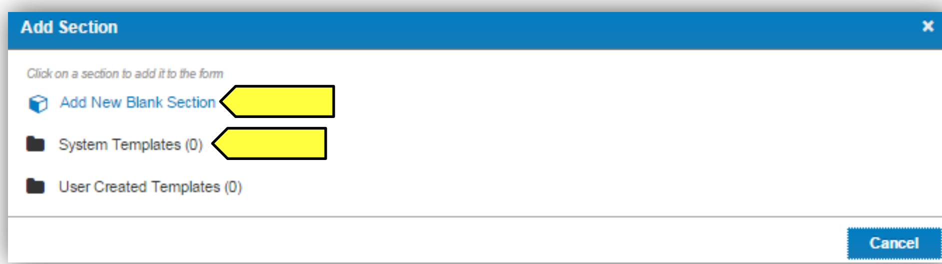
- Blinds in the Form Builder are called “Sections”
- Click the blue “Add the first section” link on the left to open the first section.



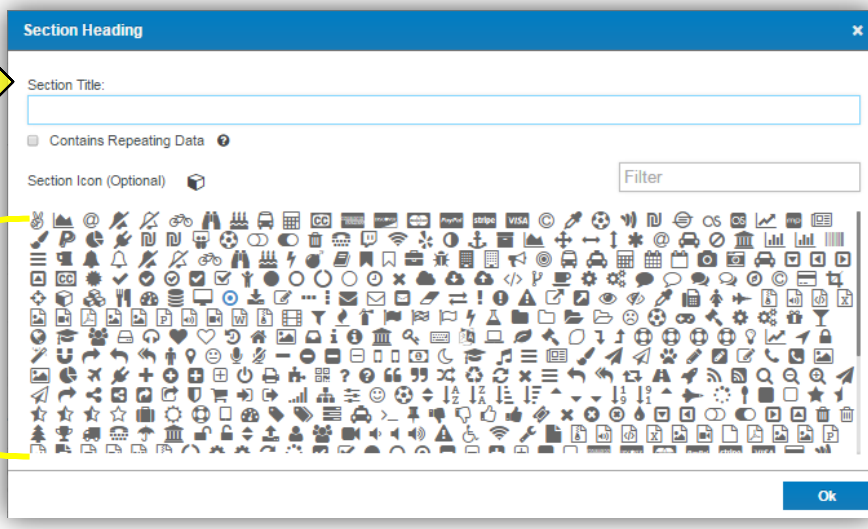
- Click the blue “Add another section” at the bottom of the page to add additional sections.



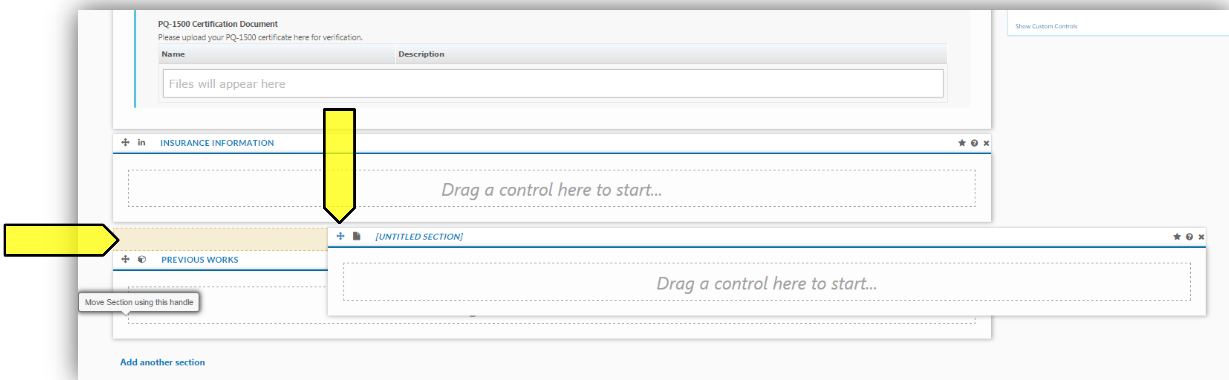
- When you add a new section, you will be prompted to click the pertinent link for:
  - Add New Blank Section
  - System Templates
  - User created Templates
    - Note the blue options are what are available to you; if they appear gray, then there are no available templates in your profile.
    - The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

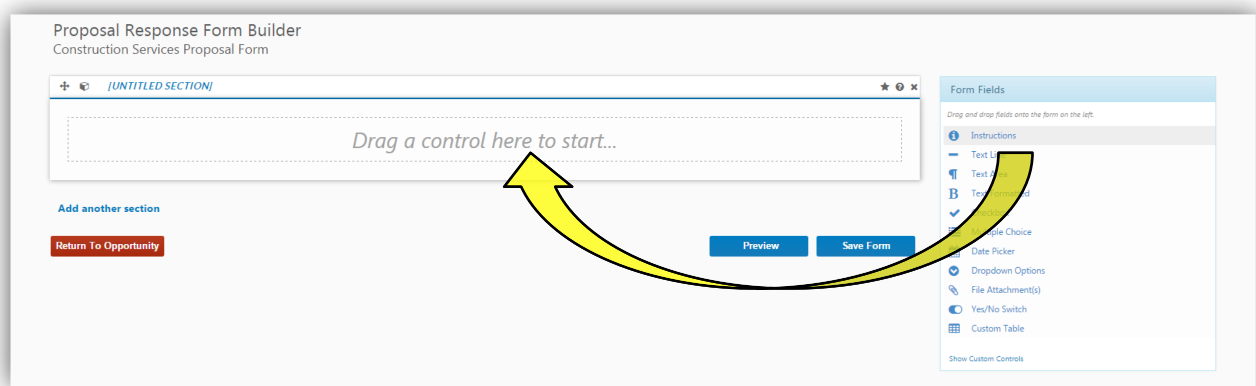


- Sections can be dragged up and down by clicking and holding the navigation icon at the top left of each blind.
  - A tan area will appear where the dragged section will land upon release.



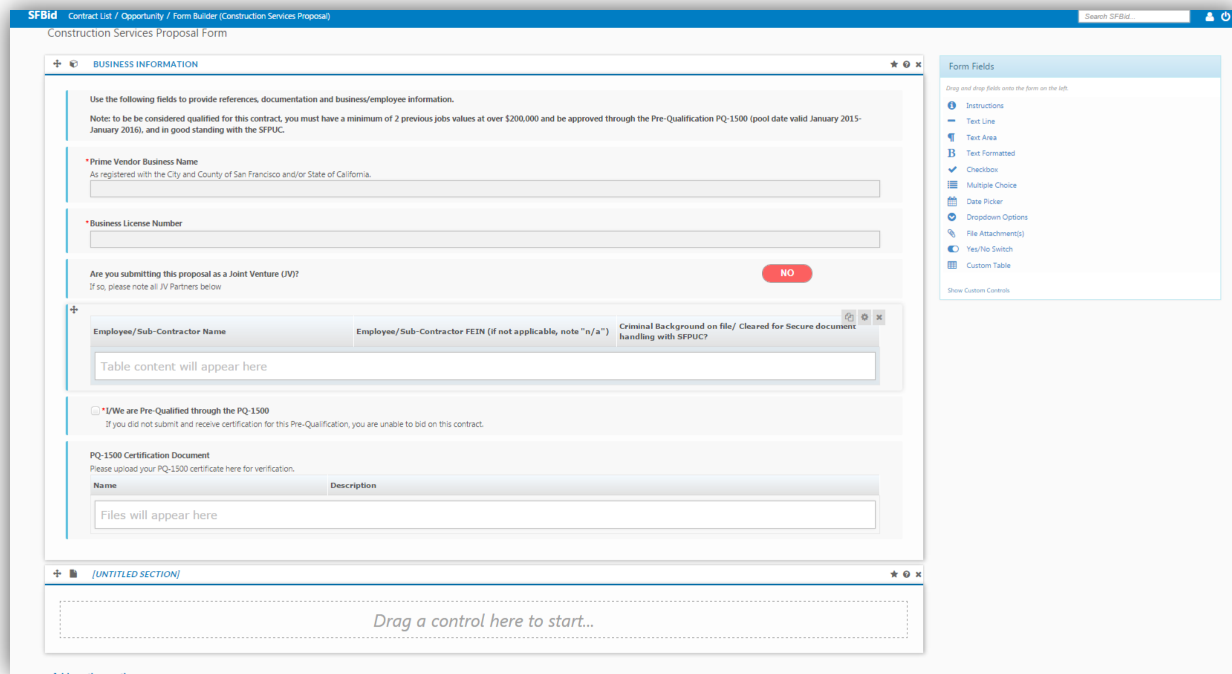
FIELDS

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

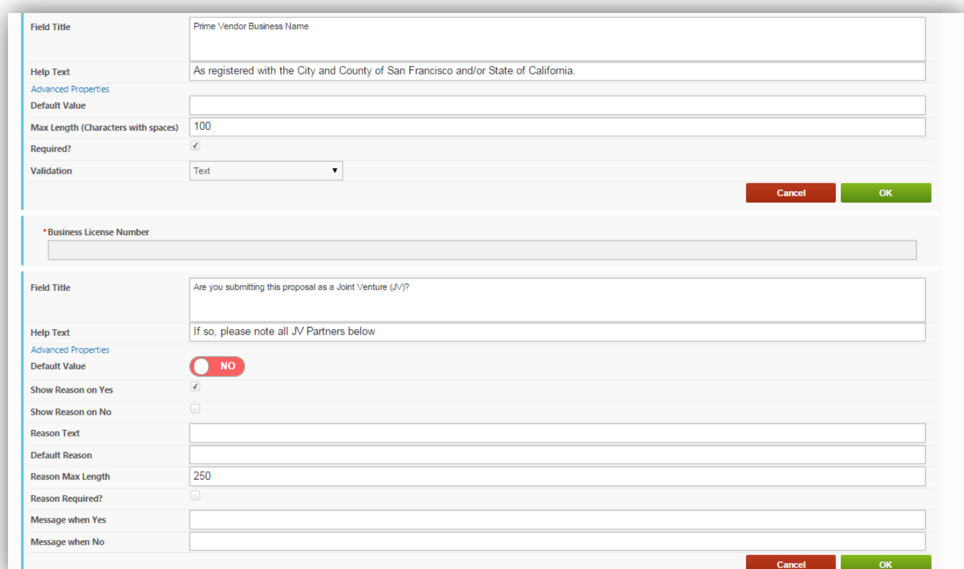


- Multiple fields can be dragged and dropped into each section or “blind,” creating the visible frames between relative information.

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



- 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



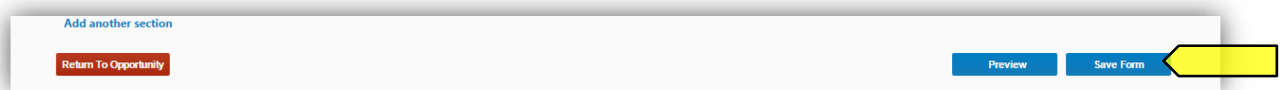
- Each time you are finished creating a field, click the green “OK” button to collapse the options and format the data.
- If you do not wish to save the information you have populated, simply click the red “Cancel” button.
    - This will return the field to the most recent version of the information 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.

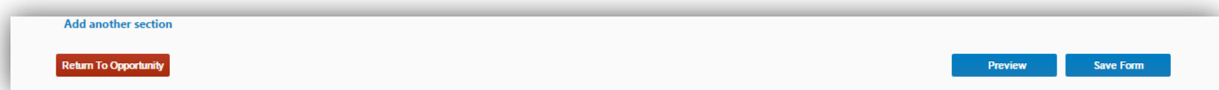
SAVE FORM

- **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 ADVERTISEMENT PAGE

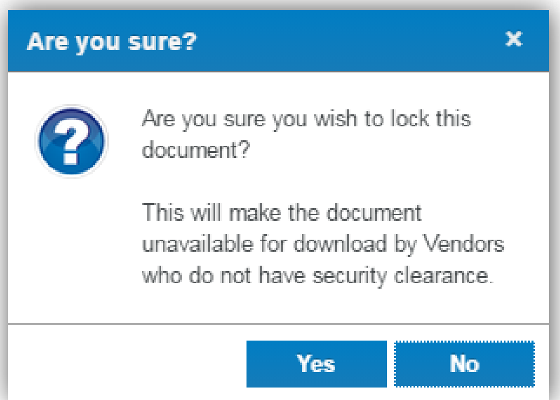
- To return to the Contract Opportunity landing page, click the red “Return to Opportunity” button on the bottom left of the form builder page.
    - Remember to click the “Save Form” button before leaving the page.



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.

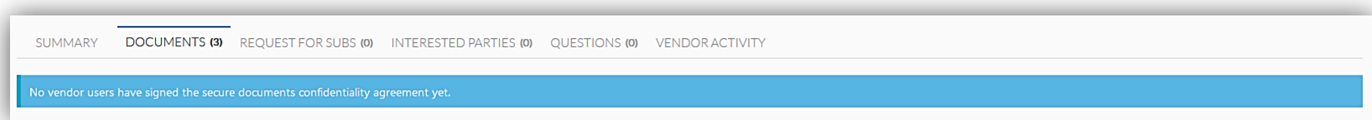
    - After a document is marked as secure, the padlock icon next to the document will appear locked.
    - In order for Vendor users to download secure documents, they have to go through extra levels of approval:
        i. Vendor users must be marked as “trusted” by the SFBid site administrator after a 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.

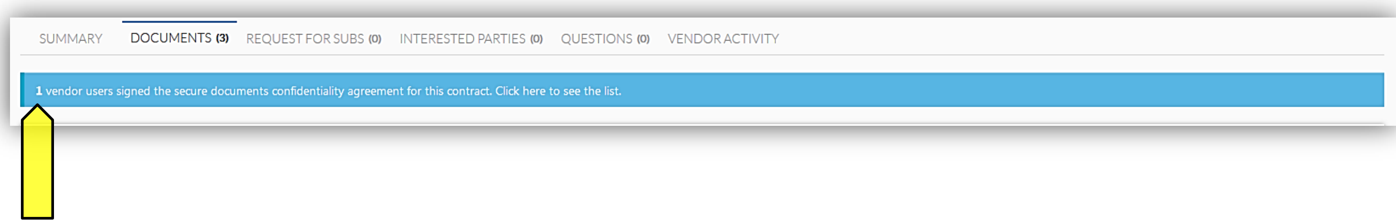


2. After the *Contract Opportunity* is made visible to the public, you will see a blue bar at the top of the *Documents* tab which lists the number of users who have signed the confidentiality agreement for this contract. Click on the blue bar to see the list of users who have signed the confidentiality agreement.

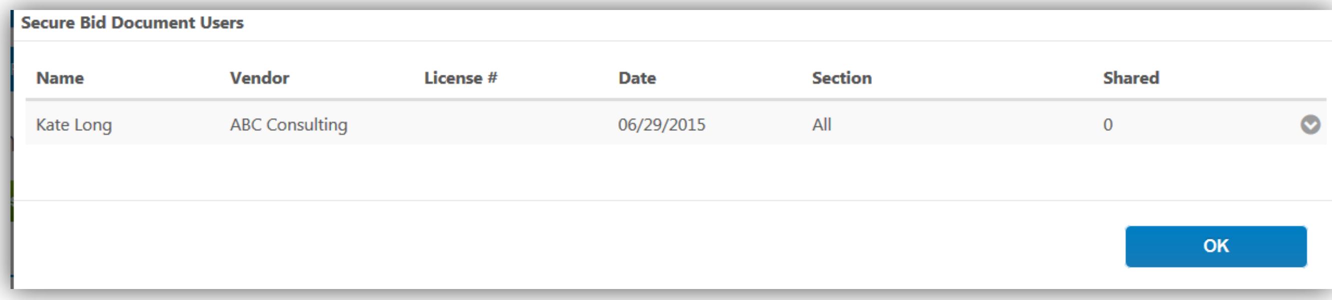
    - Note: if there are not any locked documents uploaded to the opportunity, then the blue security bar will not appear.

    - 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.



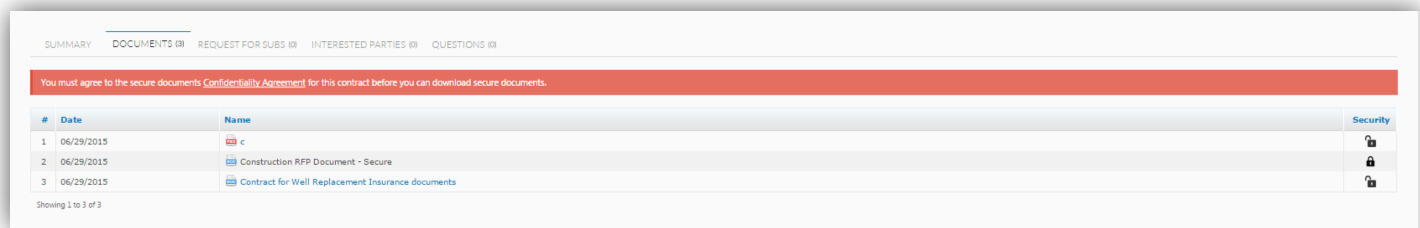


- Clicking on this blue banner will show you a list of Vendor Users who have “signed” the *Confidentiality agreement for Contract Secure Documents*, when they signed it and with whom it has been shared.

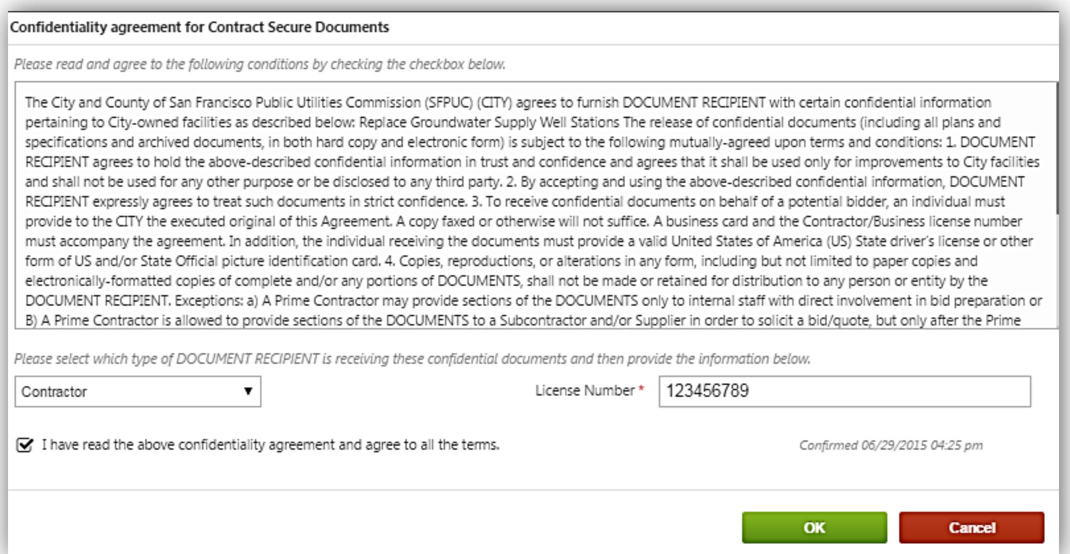


VENDOR VIEW OF SECURE DOCUMENTS (FOR CONTRACT ANALYST REFERENCE ONLY)

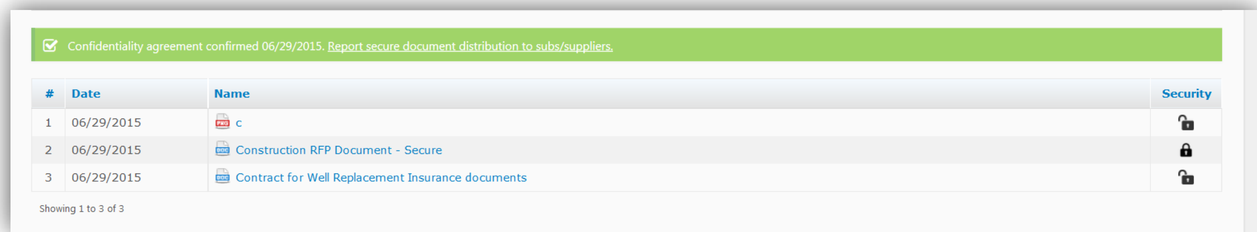
- Vendor Users will see a red bar along the top of the *Documents* tab informing them that they must sign the confidentiality document in order to view the secure documents attached to the Opportunity.



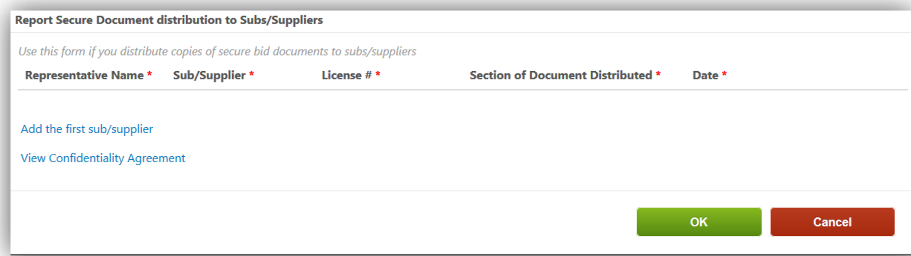
- Once a vendor clicks on the link in the red bar, they will see an agreement window appear which will be a legally binding agreement to which they will check a box and populate their business license number to proceed.



- 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

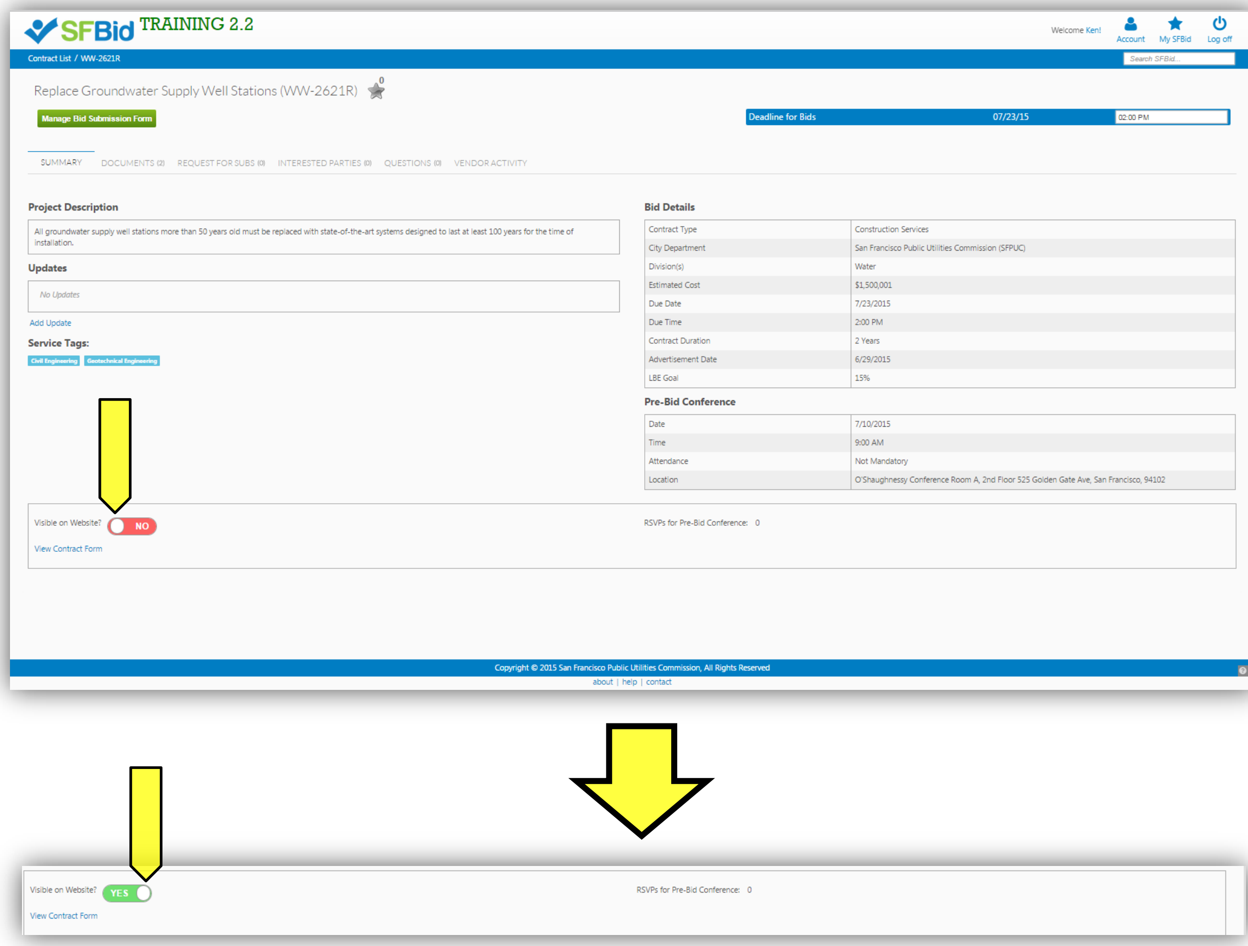


- Vendors click the "Report secure document distribution to subs/suppliers" inside this green bar
- A window appears in which the Vendor can add users and see who has agreed to the terms and viewed the document(s).



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”



- 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 RFP

- 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

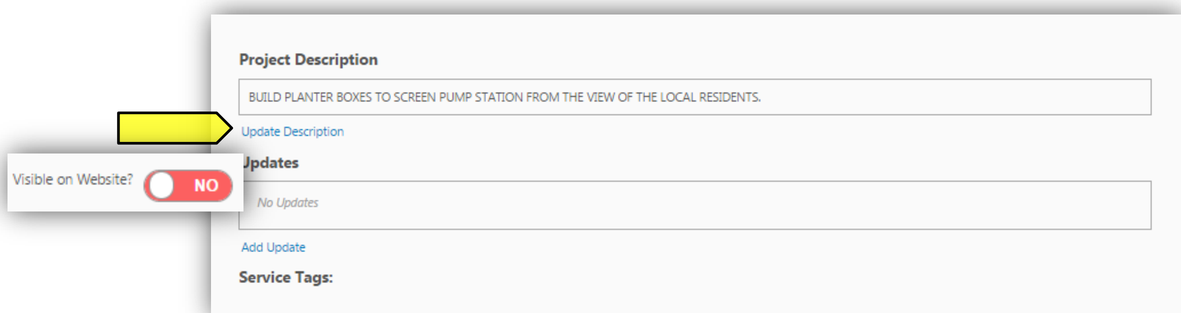
- The Deadline for Bid Submissions is able to be modified any time, whether or not is has been made visible on the website.

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

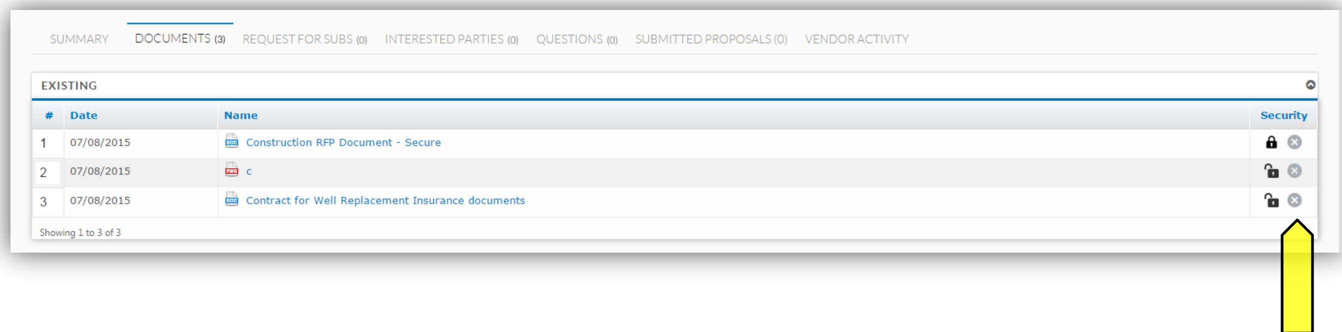
- The Project Description (populated by the *Summary of Scope of Services* in *Contract Basics*) can be elaborated upon, updated, and edited until the Contract has been made visible to the public.
- Once this has occurred, the Project Description becomes locked and the only way to clarify any mistakes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



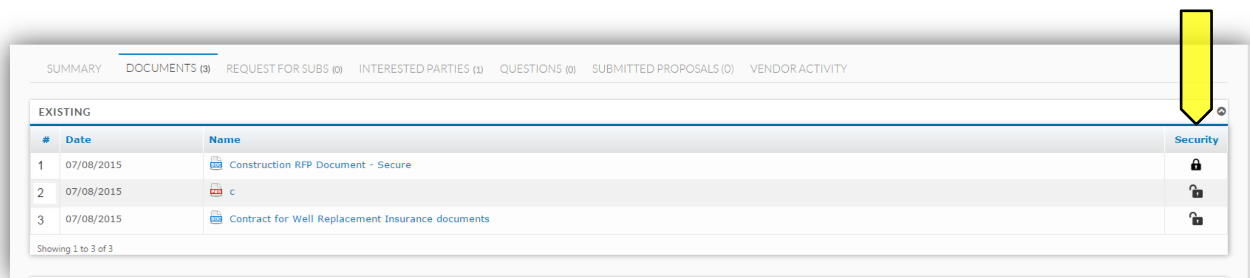
DOCUMENTS

- 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:

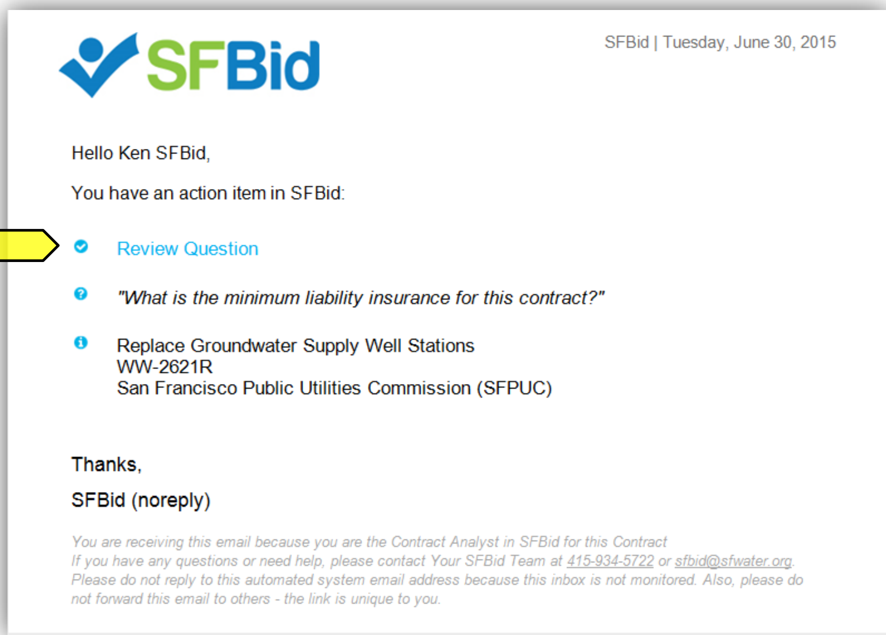


Documents that have *already been downloaded* will appear without the "X":



REVIEW AND ANSWER QUESTIONS

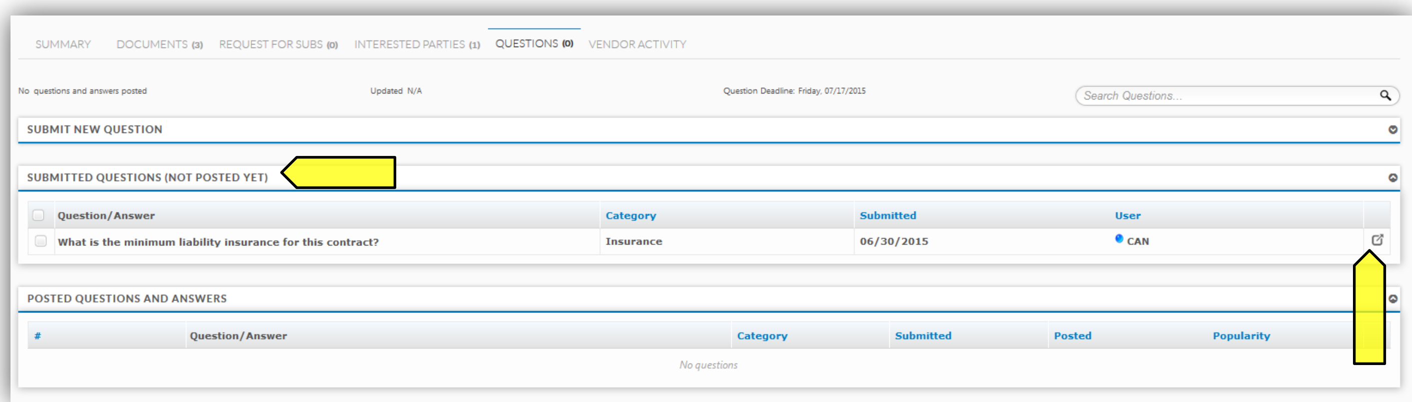
- When a Vendor User submits a question, you will receive an email notifying you that there is a question on your contract from a Vendor.
- The email will contain the question and the Contract name and number.
- Click on the blue *Review Question* link to be directed to the question (you will have to 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.

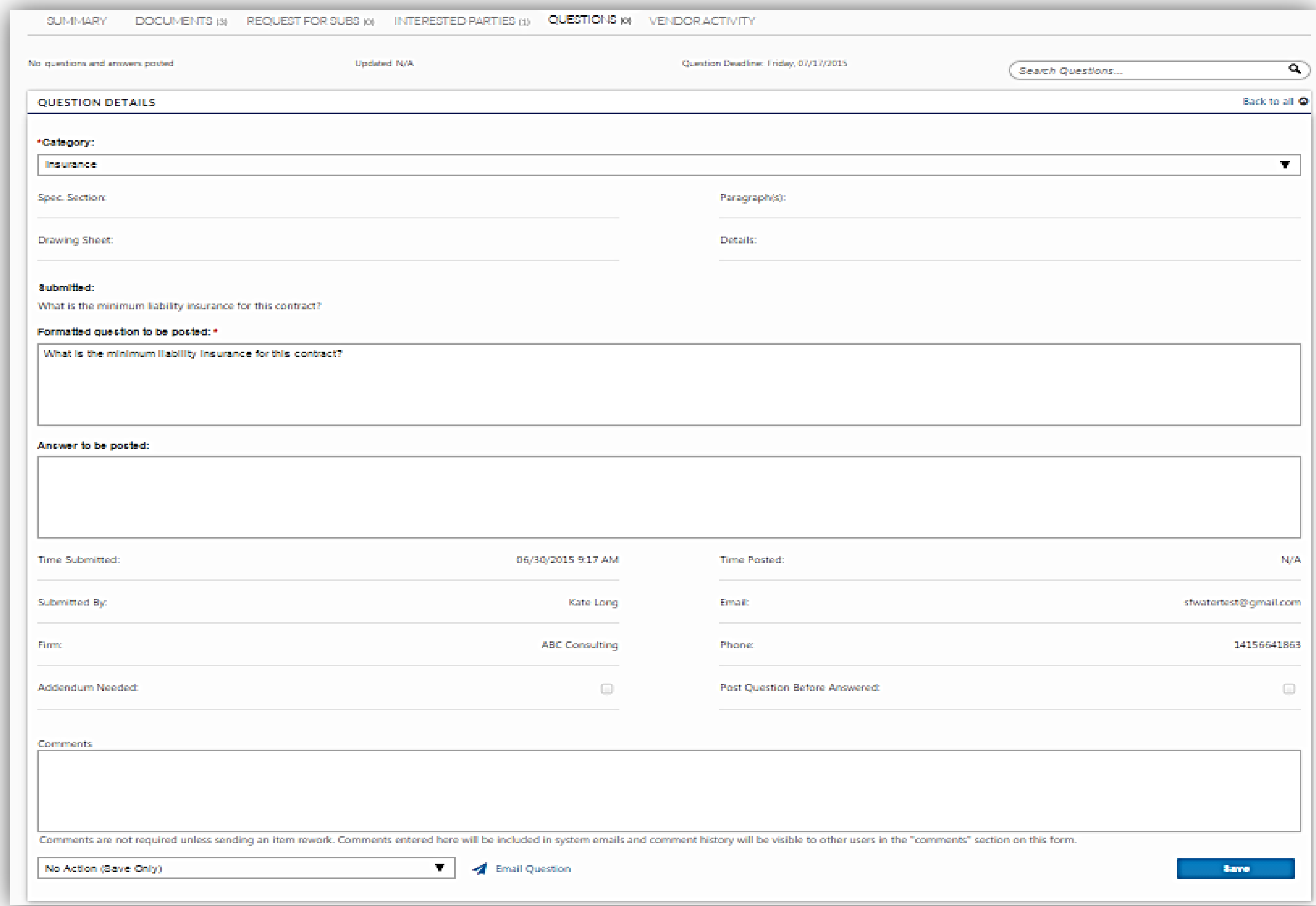
QUESTION DETAILS

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



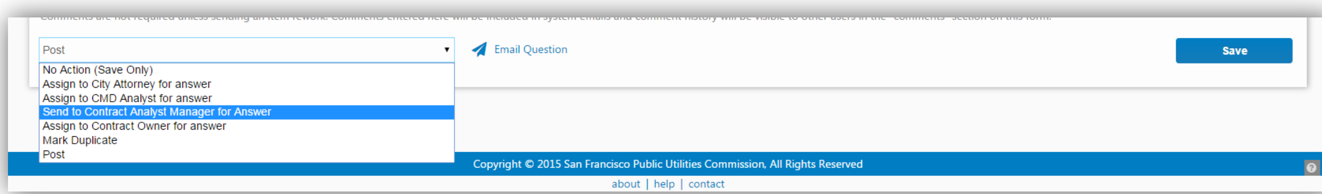
- This will bring you to the "Question Details" screen. Here you can
  - Change the Question Category
  - Reformat questions
  - Answer questions

- Comment on the question for other internal (SFPUC) users to see
- Note for addenda needed
- Post question to Contract Opportunity page for viewing before answering

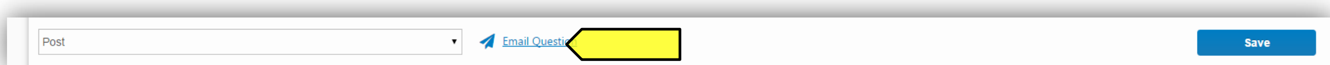


ASSIGN QUESTIONS TO BE ANSWERED BY OTHERS

- 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
  - Then click save on the bottom right of the page



- 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.



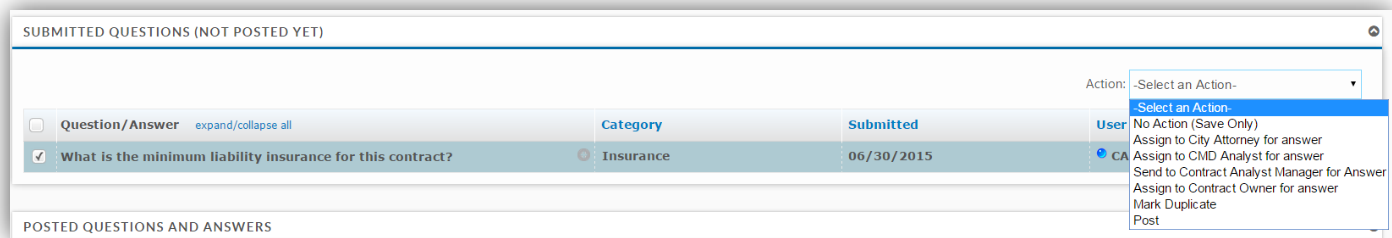
  - An email window will pop up with a template, which can be customized by you.
  - Enter the email address of the person you would like to send the email to.

- 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.

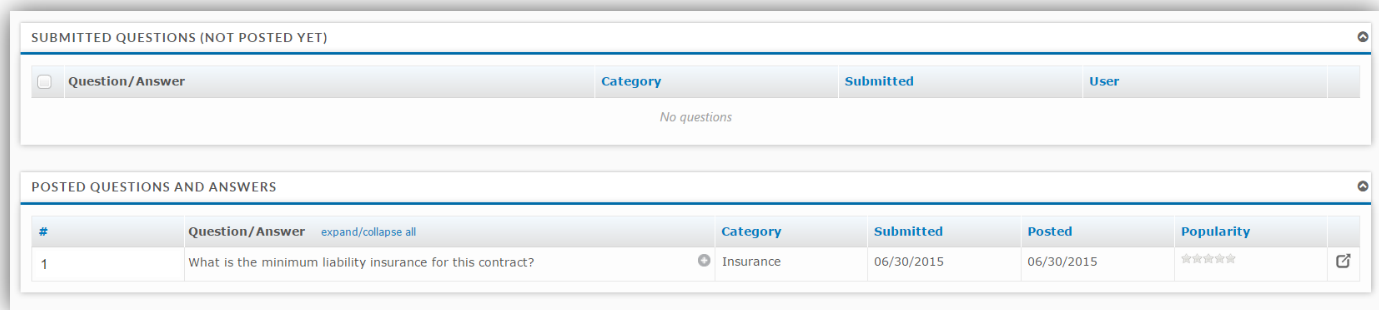
- Click “Save” if you have populated any information which you wish to maintain or are sending the question to another user in the workflow, whether or not the question is being posted to the Contract Opportunity Page.

POST 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.

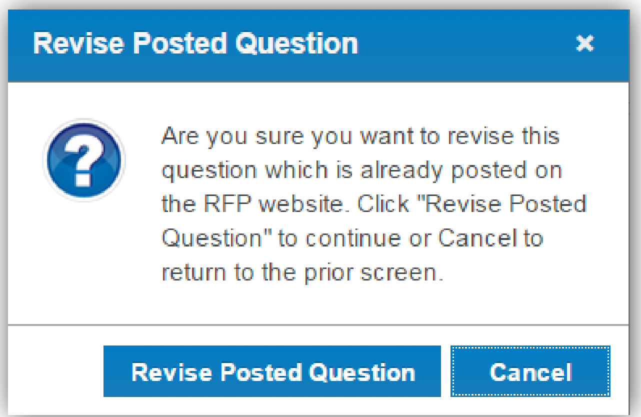


- Either of these actions will move the question from the *Submitted Questions* blind to the *Posted Questions and Answers* blind.



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”