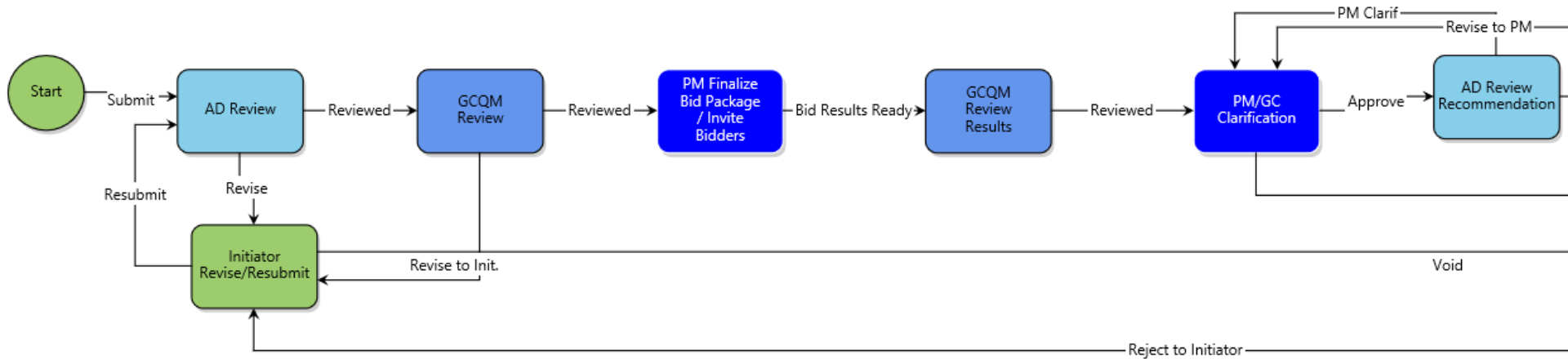
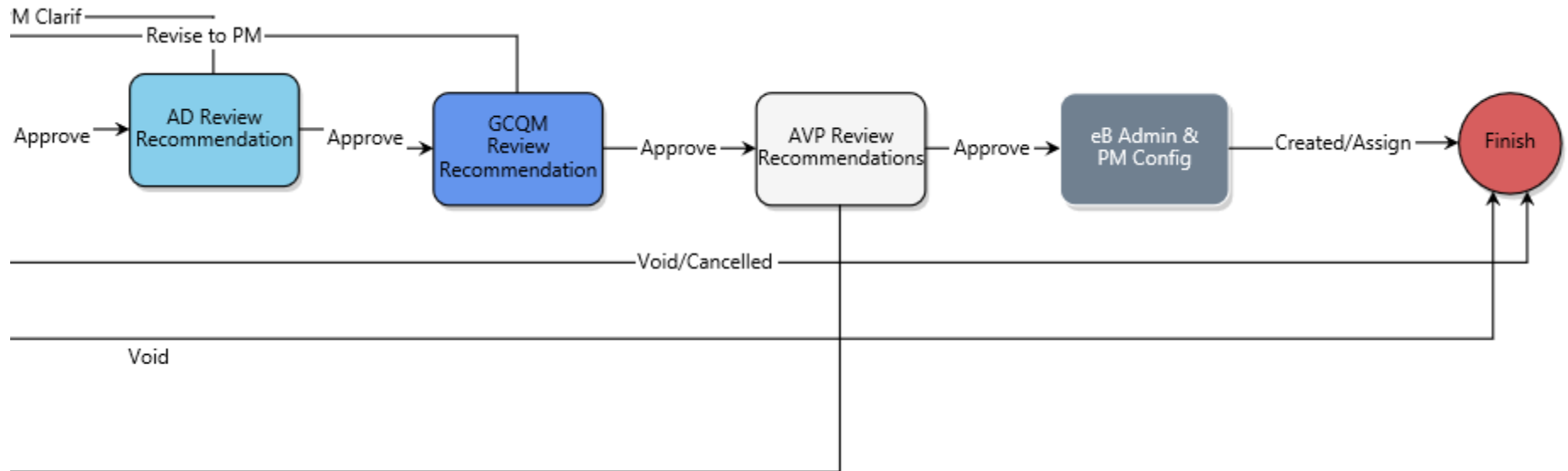




# A Guide On Vendor Selection Bid Review Process (BIDVS)

*Prepared by e-Builder  
31 January 2018*







## Process Description:

The purpose of the Vendor Selection | Bid Review process is to review and approve the winning bid/vendor and capture the bidding/GC quotes, rotation, and justification.

This process is initiated only by the Project Manager.

## Process Participants:

1. Project Manager
2. Assistant Director
3. GC Quotes Bidding Manager
4. General Contractor
5. AVP
6. eB Admin

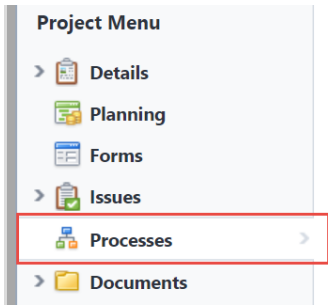
## Process Details:

1. Process is initiated by the Project Manager. Fields must be completed per prompts
2. The Associate/Assistant Director receives and reviews the information.
3. Project Manager receives the workflow and make the changes required in the comments tab.
4. General Contractor (GC) receives the workflow.
5. Project Manager receives the workflow and reviews the information.
6. General Contractor (GC) receives the workflow and reviews the information.
7. The Associate/Assistant Director receives and reviews the information.
8. General Contractor (GC) receives the workflow.
9. AVP receives and reviews the information.
10. eB Admin and Project Manager receive the workflow and review.
11. Finish – process completes

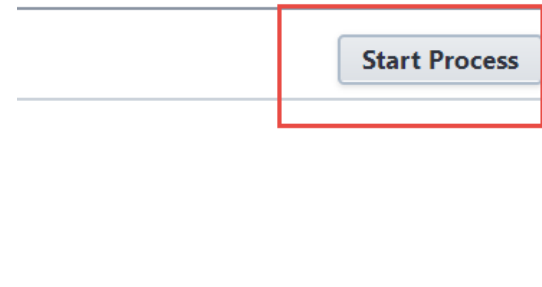
Taking the revise action requires comments to be entered by the actor requesting a revise action

## Initiation of Process:

1. Select the project you wish to start the process in
2. Select **Processes** from the Project Menu.



3. Select **Start Process** in the process Module.



4. Click **Vendor Selection Bid Review (BIDVS)** process.



### Start/Initiator Review:

1. Initiate process within specific project and read prompts. Create a bid package in the bidding module and assign a bid package name and acknowledge before submitting.
2. Scroll and complete the necessary details. Required fields will have a red asterisk (\*) and the process cannot be submitted until all required fields have been completed. Instructions are listed on the screen

<p>* Bid Package Name:</p> <p>* Bid Setup Acknowledgement:</p>	<input type="text"/> <p>By clicking below, I am confirming that the Bid Package has been setup and is ready for review by the appropriate parties involved.</p> <p><input type="radio"/> Confirmed</p>
--	---

**AD, GCQM, and PM Review:** This activities required are the same for the three steps.

1. Filter process instances by project and select desired instance.

**Filter Instances** Cancel

Status:  Draft  Open  Finished

Step Name:

Containing Text:

Filter

---

Project:  Show All Page 1 of 1 Show 25 Delete Instance

<input type="checkbox"/>	Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/>	Classroom Seating	PCP - 3	Project Charter for Classroom Seating  Priority 3 - Expedite (education/improvements)   Project Cost 24000	Submitted	Finish	01.30.2018	01.30.2018 08:51AM	Chandra Mohan, Vignesh

2. Review bid package in the bid module and add comments to dynamic grid

The following bid package is ready for your review. Navigate to the Bid Module on the project and review the bid package.

Bid Package Name:

Show Filter Download

Please add your notes/comment below regarding the bid package.

#	Reviewer Name	Reviewer Comment
Grand Totals (0 Items)		

3. Additional comments can be reviewed/added via the comments tab.

[Details \(8\)](#)
[Comments \(8\)](#)
[Attached Documents \(0\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)
Request Comment Comment

Private	Comment	
<a href="#">Make Private</a>	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:06 AM
<a href="#">Make Private</a>	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:04 AM

## GCQM Review Results:

1. Filter process instances by project and select desired instance.

**Filter Instances** Cancel

Status:  Draft  Open  Finished

Step Name:

Containing Text:

Filter

Project:  Show All Page 1 of 1 Show 25 Delete Instance

<input type="checkbox"/>	Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/>	Classroom Seating	PCP - 3	Project Charter for Classroom Seating  Priority 3 - Expedite (education/improvements)   Project Cost 24000	Submitted	Finish	01.30.2018	01.30.2018 08:51AM	Chandra Mohan, Vignesh

2. Review bid package in the bid module and review comments in dynamic grid, these fields are now read-only. GCWM must add comments to required text box.

The following bid package is ready for your review. Navigate to the Bid Module on the project and review the bid package.

Bid Package Name:

Show Filter Download

Please add your notes/comment below regarding the bid package.

#	Reviewer Name	Reviewer Comment
Grand Totals (0 Items)		

3. Additional comments can be reviewed/added via the comments tab.

[Details](#)
[Comments \(8\)](#)
[Attached Documents \(0\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)
Request Comment Comment

Private	Comment	
Make Private	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:06 AM
Make Private	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:04 AM



## PM/GC Clarification Comments:

1. Filter process instances by project and select desired instance.

**Filter Instances** Cancel

Status:  Draft  Open  Finished

Step Name:

Containing Text:

Filter

---

Project:  Show All Page 1 of 1 Show 25 Delete Instance

<input type="checkbox"/>	Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/>	Classroom Seating	PCP - 3	Project Charter for Classroom Seating  Priority 3 - Expedite (education/improvements)   Project Cost 24000	Submitted	Finish	01.30.2018	01.30.2018 08:51AM	Chandra Mohan, Vignesh

2. Review bid package in the bid module and all comments in process instance. PM must confirm with client if bid results are acceptable and add comments

Please confirm with the client if the bid results and cost are acceptable to move forward.

GCQM Comments/Recommendation:

\* PM Comments/Recommendation:

3. Additional comments can be reviewed/added via the comments tab.

[Details](#)
[Comments \(8\)](#)
[Attached Documents \(0\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)
Request Comment Comment

Private	Comment	
Make Private	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:06 AM
Make Private	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:04 AM

## AD Review:

1. Filter process instances by project and select desired instance.

**Filter Instances** Cancel

Status:  Draft  Open  Finished

Step Name:

Containing Text:

Filter

Project:  Show All Page  of 1 Show  Delete Instance

<input type="checkbox"/>	Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/>	Classroom Seating	PCP - 3	Project Charter for Classroom Seating  Priority 3 - Expedite (education/improvements)   Project Cost 24000	Submitted	Finish	01.30.2018	01.30.2018 08:51AM	Chandra Mohan, Vignesh

2. Review bid package in the bid module and all comments in process instance. PM must confirm with client if bid results are acceptable and add comments

Please confirm with the client if the bid results and cost are acceptable to move forward.

GCQM Comments/Recommendation:

PM Comments/Recommendation:

\* AD Comments/Recommendation:

3. Additional comments can be reviewed/added via the comments tab.

[Details](#)
[Comments \(8\)](#)
[Attached Documents \(0\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)
Request Comment Comment

Private	Comment	
Make Private	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:06 AM
Make Private	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:04 AM

## AVP Review Recommendation:

1. Filter process instances by project and select desired instance.

**Filter Instances** Cancel

Status:  Draft  Open  Finished

Step Name:

Containing Text:

Filter

---

Project:  Show All Page 1 of 1 Show 25 Delete Instance

<input type="checkbox"/>	Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/>	Classroom Seating	PCP - 3	Project Charter for Classroom Seating  Priority 3 - Expedite (education/improvements)   Project Cost 24000	Submitted	Finish	01.30.2018	01.30.2018 08:51AM	Chandra Mohan, Vignesh

2. Review bid package in the bid module and all comments in process instance.

Please confirm with the client if the bid results and cost are acceptable to move forward.

GCQM Comments/Recommendation:

PM Comments/Recommendation:

AD Comments/Recommendation:

GCQM Final Comments/Recommendation:

3. Additional comments can be reviewed/added via the comments tab.

[Details](#)
[Comments \(8\)](#)
[Attached Documents \(0\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)
Request Comment Comment

Private	Comment	
Make Private	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:06 AM
Make Private	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:04 AM

## eB Admin & PM Config:

1. Filter process instances by project and select desired instance. Follow prompts on screen

**Filter Instances** Cancel

Status:  Draft  Open  Finished

Step Name:

Containing Text:

Filter

---

Project:  Show All Page 1 of 1 Show 25 Delete Instance

<input type="checkbox"/>	Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/>	Classroom Seating	PCP - 3	Project Charter for Classroom Seating  Priority 3 - Expedite (education/improvements)   Project Cost 24000	Submitted	Finish	01.30.2018	01.30.2018 08:51AM	Chandra Mohan, Vignesh

2. Review bid package in the bid module and all comments in process instance. Follow prompts to add vendor to project, send notifications, etc.

This Bid/Vendor Selection has been approved. Please do the following:

1. PM or eB System Admin, please add the company to the project.
2. eB System Admins, please create the users' logon, assign the user(s) into functional and document permissions roles, and add them to the project as participants.
3. PM, on the Invited Bidders tab, award the bid to the selected vendor/company and enter your message before sending the award email.

3. Additional comments can be reviewed/added via the comments tab.

[Details](#)
[Comments \(8\)](#)
[Attached Documents \(0\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)
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<a href="#">Make Private</a>	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:06 AM
<a href="#">Make Private</a>	*Add Comment	Edward Eng, e-Builder, Inc., 01.30.2018 8:04 AM

## Read Only: Fields become read only

1. Filter process instances by project and select desired instance. Follow prompts on screen

**Filter Instances** Cancel

Status:  Draft  Open  Finished

Step Name:

Containing Text:

Filter

Project:   Page  of 1 Show

<input type="checkbox"/>	Project	Process	Subject	Status	Step	In Step Since	Date Created	Created By
<input type="checkbox"/>	Classroom Seating	PCP - 3	Project Charter for Classroom Seating  Priority 3 - Expedite (education/improvements)   Project Cost 24000	Submitted	Finish	01.30.2018	01.30.2018 08:51AM	Chandra Mohan, Vignesh

3. Additional comments can be reviewed/added via the comments tab.

[Details](#)
[Comments \(8\)](#)
[Attached Documents \(0\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)

Private

[Make Private](#) \*Add Comment Edward Eng, e-Builder, Inc., 01.30.2018 8:06 AM

[Make Private](#) \*Add Comment Edward Eng, e-Builder, Inc., 01.30.2018 8:04 AM

Project:	z - User Acceptance Testing (UAT) w/Cost & Sched <b>1</b>		
Process Document:	BIDVS - 1 <b>2</b> <a href="#">Show History</a>   <a href="#">Current Actors</a>	Overall Due Date: <b>6</b>	
Current Workflow Step:	Finish <a href="#">Show Workflow Diagram</a> <b>3</b>	Step Due Date: <b>7</b>	
Subject:	Sample Bid Bid Package for z - User Acceptance Testing (UAT) w/Cost & Sched <b>4</b>		
Status:	Void <b>5</b>		

Each time you open a process to perform your function within a project, you will see the Process Header. The process header contains information that can help you identify where you are within a process, within a project.

- 1. Project:** Project Name
- 2. Process Document:** The process instance
  - **Show History:** Will display a historical list of actions taken within this process instance
  - **Current Actors:** Will display a list of actors responsible for the process in its current step
- 3. Current Workflow Step:** The name of the current step
  - **Show Workflow Diagram:** Will display the workflow diagram, highlighting the current step where this instance is with a blue frame
- 4. Subject:** Displays the specific process instance subject
- 5. Status:** Displays the process' current status
- 6. Overall Due Date:** Date the process needs to be completed by *(If applicable)*
- 7. Step Due Date:** Date this step in the process needs to be completed by *(If applicable)*

**Support:**

**Announcements** ▾

**To contact e-Builder Support**  
Please call (888) 288-5717 or email [support@e-builder.net](mailto:support@e-builder.net). Thank you!

**Notes and Comments:**