A Guide On

Vendor Selection Bid Review Process (BIDVS)

Prepared by UCF / e-Builder
10 February 2022

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| Dashboard | Projects | Forms | Processes | Documents | Calendar | Contacts | Bidding | Cost | Schedule | Reports | + |
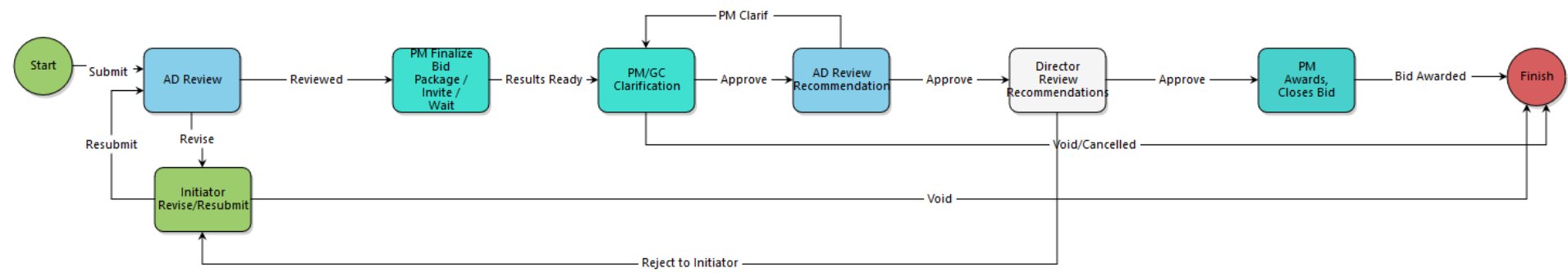
Process Description:

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. Director

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. Project Manager receives the workflow and reviews the information.

5. The Associate/Assistant Director receives and reviews the information.

6. Director receives and reviews the information.

7. Project Manager receive the workflow and review.

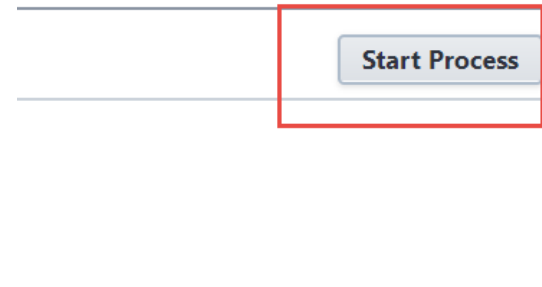8. Finish – process completes

Taking the revise action requires comments to be entered by the actor requesting a revise action
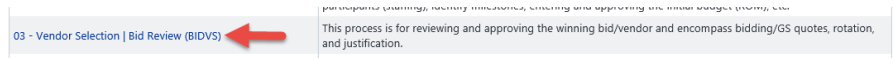
Initiation of Process:

1. Select the project you wish to start the process in

2. Select **Processes** from the Project Menu.

Project Menu
- > Details
- Planning
- Forms
- > Issues
- Processes >
- > Documents
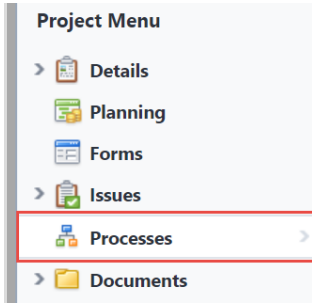
3. Select **Start Process** in the process Module.

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

03 - Vendor Selection | Bid Review (BIDVS)

This process is for reviewing and approving the winning bid/vendor and encompass bidding/GS quotes, rotation, and justification.

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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

* Bid Package Name:	
* Bid Setup Acknowledgement:	By clicking below, I am confirming that the Bid Package has been setup and is ready for review by the appropriate parties involved. ○ Confirmed

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

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

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

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

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Vendor Selection Bid Review (BIDVS) Process

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PM/GC Clarification Comments:

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

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.

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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: All Projects ▼ | Show All | Page 1 ▼ of 1 Show 25 ▼ | Delete Instance

☐	Project ▲	Process	Subject	Status	Step	In Step Since	Date Created	Created By
☐	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

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| Dashboard | Projects | Forms | Processes | Documents | Calendar | Contacts | Bidding | Cost | Schedule | Reports | + |

Director 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: All Projects ▼   Show All   Page 1 ▼ of 1   Show 25 ▼   Delete Instance

☐	Project ▲	Process	Subject	Status	Step	In Step Since	Date Created	Created By
☐	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
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Vendor Selection Bid Review (BIDVS) Process

	Dashboard	Projects	Forms	Processes	Documents	Calendar	Contacts	Bidding	Cost	Schedule	Reports	+

PM Awards, Closes Bid:

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: [All Projects ▼] Show All   Page [1 ▼] of 1 Show [25 ▼] Delete Instance

	Project ▲	Process	Subject	Status	Step	In Step Since	Date Created	Created By
☐	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 instructions to add vendor to project, close the bid, etc. Check each box to confirm that these tasks are complete.

> This Bid/Vendor Selection has been approved. PM, please do the following:
>
> 1. Award the project to the winning bid in the Bidding module.
> 2. Close the bid.
> 3. Update the budget in the Cost module.
>
> * Project Awarded: ☐Yes
> * Bid Closed: ☐Yes
> * Budget Updated: ☐Yes

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
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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: [All Projects ▼] Show All   Page [1 ▼] of 1 Show [25 ▼] Delete Instance

☐	Project ▲	Process	Subject	Status	Step	In Step Since	Date Created	Created By
☐	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) |

Request Comment   Comment

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

Home	Dashboard	Projects	Forms	**Processes**	Documents	Calendar	Contacts	Bidding	Cost	Schedule	Reports	+

Project: z - User Acceptance Testing (UAT) w/Cost & Sched **(1)**

Process Document: BIDVS - 1 **(2)**
Show History | Current Actors

Current Workflow Step: Finish   Show Workflow Diagram **(3)**

Subject: Sample Bid Bid Package for z - User Acceptance **(4)**
Testing (UAT) w/Cost & Sched

Status: Void **(5)**

Overall Due Date: **(6)**

Step Due Date: **(7)**

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 Information

Dashboard | **Projects** | **Forms** | **Processes** | **Documents** | **Calendar** | **Contacts** | **Bidding** | **Cost** | **Schedule** | **Reports**

Support:

Notes and Comments:

Training Resources
Please visit the FP&C website for a variety of e-Builder training resources both in print and video.
http://fp.ucf.edu/resources/ebuilder/

Need e-Builder Help?
Please call (888) 288-5717 or email support@e-builder.net. Thank you!

For UCF Project Support
e-Builder System Admins can be reached at eBuilderadmin@ucf.edu