Technical White Paper

SPITFIRE SOFTWARE®

Bid Packaging – RFQ Processing

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Introduction

sfPMS uses the Bid Package, RFQ and Commitment Doc types (and optionally, the Invitation to Bid document and Plan Room Dashboard) to facilitate requesting quotes (bids) from vendors and converting awarded bids into vendor contracts. This white paper illustrates the way the Doc types work together and offers best practices for bid processing workflows.

Note: There can be other workflows involving these Doc types including the use of cloud storage. Once you understand how they work together, you will figure out the best workflow for your projects.

This paper assumes some familiarity with sfPMS and its dashboards as described in the *Overview Guide* as well as a general understanding of Spitfire documents as described in the *Focus on Document and Item Basics* guide. Information on how to create the specific Doc types mentioned in this guide can be found in the *Focus on Doc Types and Project Workflow* guide.

Overview

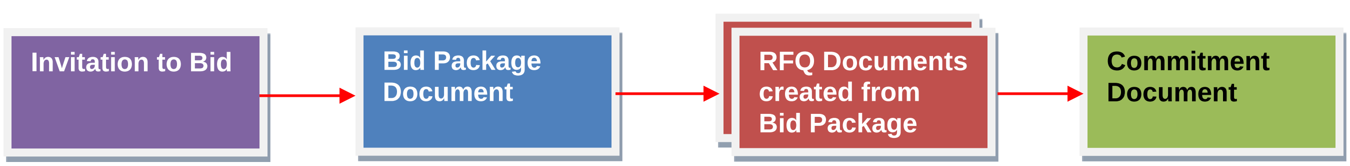
Workflow Involving Invitation To Bid

You can start your Bid Package workflow with the Invitation to Bid document.

- Create the Invitation to Bid document.
    - Route the Invitation to Bid to vendors and pre-vendors.
    - Record the responses from the vendors on the Invitation to Bid's Route Detail tab.
- Create the (related) Bid Package.
- Attach the Invitation to Bid to the Bid Package.
- Attach files and other documents to the Bid Package.
- On the Bid Package's RFQ tab, use the icon to automatically create RFQs for the vendors who responded in the affirmative to the Invitation to Bid.

  or

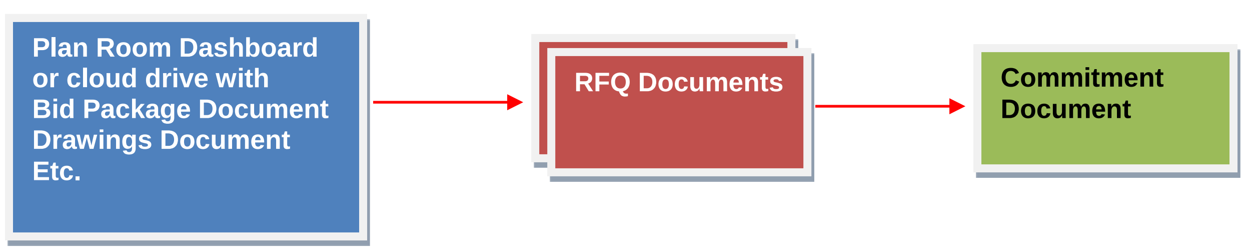
  On the Bid Package's RFQ tab, create an RFQ for each selected vendor through the and/or icons.
- Route the RFQs to the vendors.
- Input the returned quote information into the RFQ document or have the vendors enter this information themselves.
- Review the RFQs through the Bid Package, perhaps using the Competitive Bid Response Analysis (CoBRA) workbook.
- Award an RFQ.
- Create a Commitment from the awarded RFQ.



Workflow Involving Plan Room or Cloud Storage

- Create a Bid Package document when you need vendor quotes.
- Place the Bid Package on the Plan Room Dashboard or include the Bid Package on your cloud drive.
- Place other Doc types, such as Drawings, on the Plan Room Dashboard or cloud drive also.
- Notify vendors about the Plan room or cloud drive, through regular public means.
- As you receive the sealed bids from vendors, create an RFQ for each vendor from the Bid Package's RFQ tab.

  Note: if your vendors can log into Spitfire with a personal login, they may be able to create their own RFQ documents from the Bid Package through a self-service link. For more information, see the *Setup for Spitfire's Plan Room* technical white paper and the *How to Use the Plan Room (from a vendor login)* instructions.
- Review the RFQs through the Bid Package, perhaps using the Competitive Bid Response Analysis (CoBRA) workbook.
- Award an RFQ.
- Create a Commitment from the awarded RFQ.



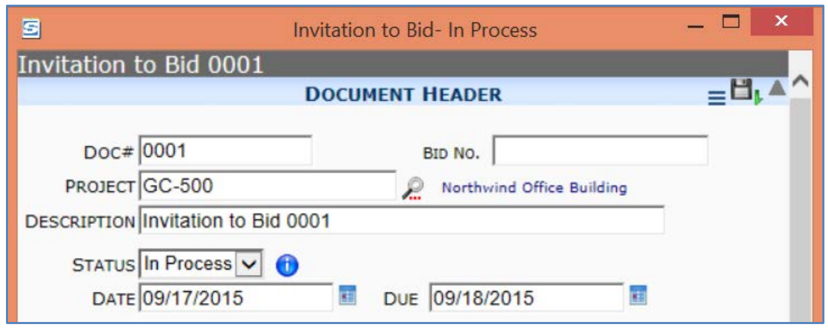
The Invitation to Bid Document

Your workflow can start with an Invitation to Bid document as a place to record which vendors are interested in bidding. You can then use this information on your Bid Package.

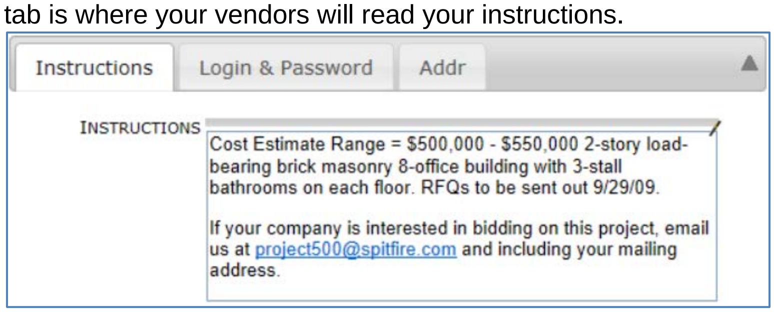
For more information about the Invitation to Bid document, see the *Focus on Doc Types and Project Workflow* guide.

Considerations

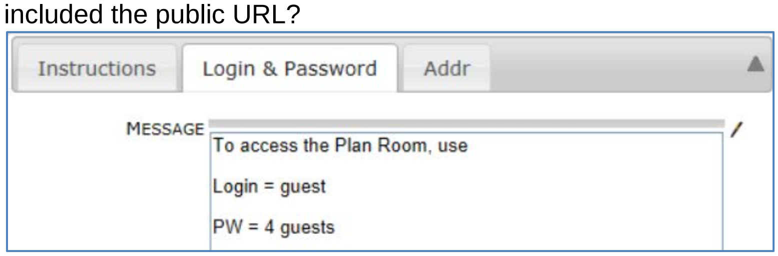
- Are the Document Header fields filled in? Have you indicated the date by which the vendors must respond to you on the **Due** field?



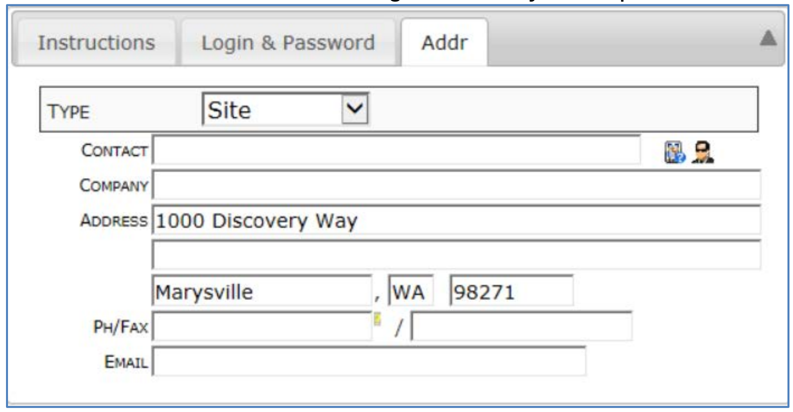
- Have you filled in the field on the **Instructions** tab? If you are using an Attachment template to generate an output file that will be routed to vendors, information on the Instructions tab will likely be included in that file. If you are placing the Invitation to Bid on the Plan Room Dashboard or cloud drive, the Instructions tab is where your vendors will read your instructions.



- If you want your vendors to go to the Plan Room for more information/documents, have you entered a **Login and Password** for them to use to access the Plan Room? Likewise, if you want your vendors to access your cloud drive, have you included the public URL?



- Do you want to indicate a bid location or site location on the **Address** tab? **Note**: some configuration may be required.



- If you are going to route the Invitation to Bid, you will need to add routees to the **Route Detail** tab. (For more information, see the *Focus on Routes* guide.) Routed Invitation to Bid documents often use Transmittal templates because transmittal output is personalized per routee. The Build Route dialog can even default to include transmittals for this Doc type.

- If there is an **Attachment** ( ), or **Attachment (auto)** template for the **Invitation to Bid**, a file will be generated from the template and routed to any routees. (For more information, see the *Focus on Files, Attachments and the Catalog Dashboard* guide.)

Vendor Responses

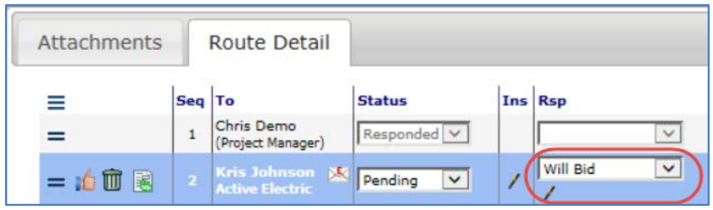
If you route the Invitation to Bid to vendors, these vendors will be listed on the Route Detail tab. Vendors can reply to emails (and indicate their interest through the Response Wizard) or indicate in some other way (such as regular mail) that they want to bid and you can edit the routee rows to indicate their responses.

Respond Wizard

It is possible for vendors to follow a link in the email they receive in order to get to a Response Wizard. For more information, see the *Focus on Routes* guide.

Route Detail Tab

If you need to record a vendor's response yourself, select the proper **Rsp** from the drop-down.



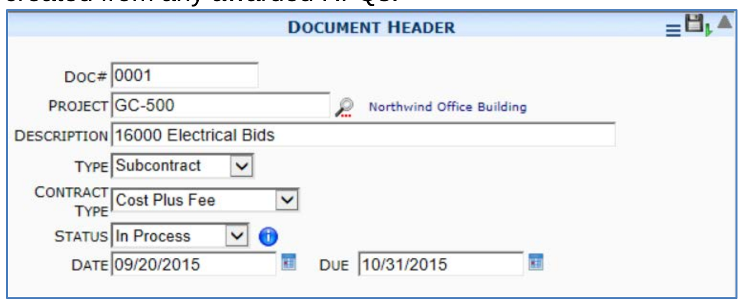
For more information, see the *Focus on Routes* guide or the Invitation to Bid chapter in the *Focus on Doc Types and Project Workflow* guide.

The Bid Package Document

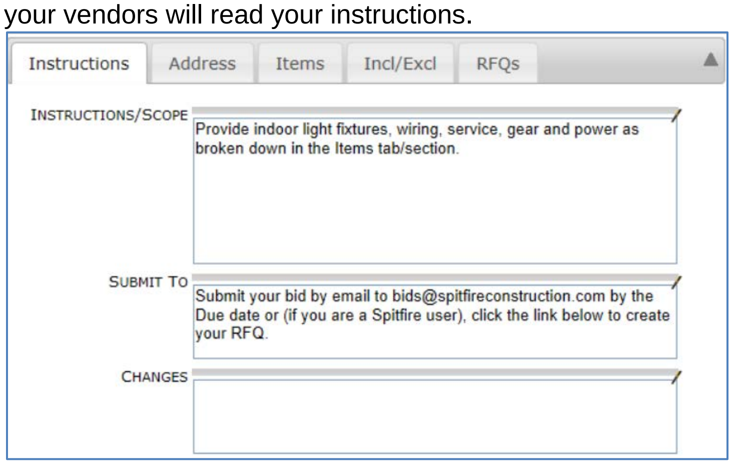
Before you place the Bid Package on the Plan Room Dashboard/cloud drive and begin creating RFQs, you should first ensure that all pertinent information is on the Bid Package.

Considerations

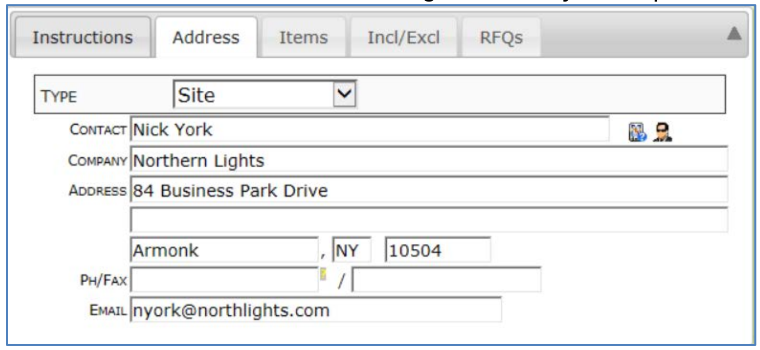
- Are the Document Header fields filled in? Have you indicated the date by which the vendor quotes are due in the **Due** field? If you select a **Type**, this type will be passed to Commitments created from any awarded RFQs.



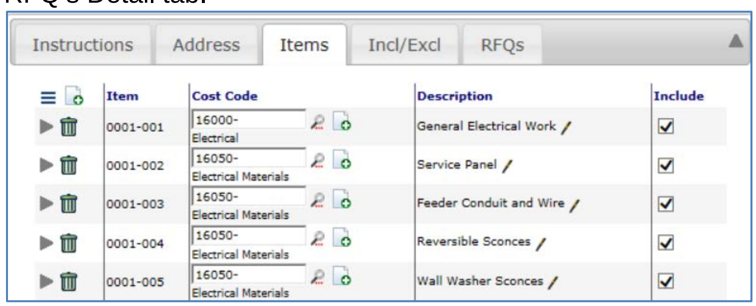
- Have you filled in the fields on the **Instructions** tab? If you are using an Attachment template to generate output files that will be routed to vendors, information on the Instructions tab may be included in the file. If you are placing the Bid Package on the Plan Room Dashboard/cloud drive, the Instructions tab is where your vendors will read your instructions.



- Do you want to indicate a bid location or site location on the **Address** tab? **Note**: some UI configuration may be required.



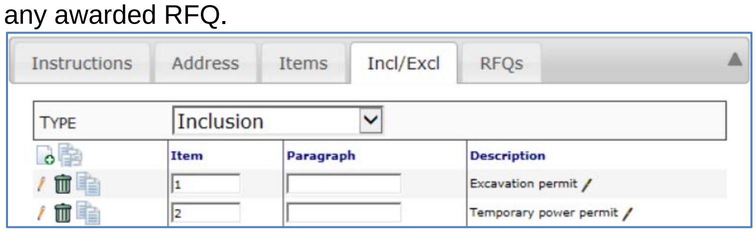
- Are all Items for which you want a quote, in the **Items** tab? Items need a **Cost Code**, **Description**, **Acct Category** and **Units**. Be sure the **Include** checkbox is checked if you want the Item to be included in the final calculation summarized on the RFQ's Detail tab.



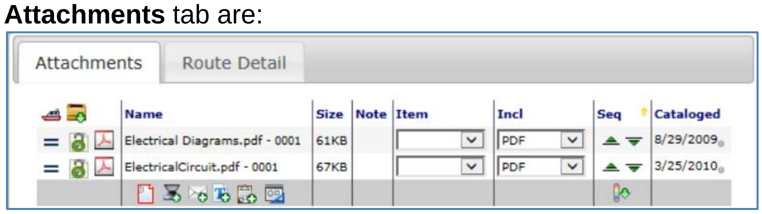
TIP

The attachment of drawing files onto a Bid Package can be automated through the **DocTypeConfig | AutoAttach** rule. For more information, see [KBA-01154](KBA-01154).

- Did you want to add Inclusions, Exclusions, Legal Attachments or Other Clauses at the **Incl/Excl** tab? Whatever you add to this tab will be copied to the RFQs and to Commitments created from any awarded RFQ.



- Do you want any files attached to the Bid Package? Files in the **Attachments** tab are:



  - copied over to the RFQs that are created from the Bid Package, and routed to vendors
  - downloaded by vendors who open the Bid Package on the Plan Room Dashboard
  - downloaded by vendors who access the Bid Package folder in the cloud drive

Note: you can add Drawing documents (logs) directly on to the Plan Room Dashboard or cloud drive if vendors will be accessing one of these.

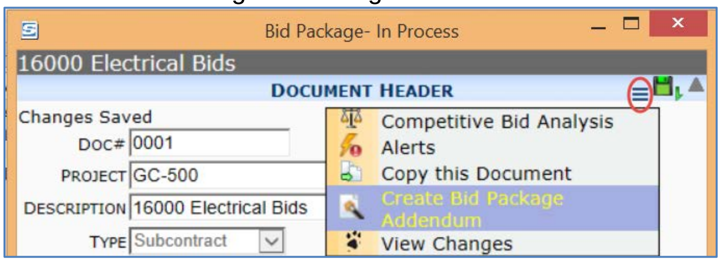
- Do you intend to route the Bid Package? While you can route the Bid Package internally (and therefore may need to add to the **Route Detail** tab), Bid Package documents are not usually routed to vendors.
- Do you need to set up any templates? If there are **Attachment** ( ), **Attachment (auto)** or **Attachment (all)** templates for the Bid Package, the same templates will apply to the RFQs created from the Bid Package.
  For more information, see the *Focus on Files, Attachments and the Catalog Dashboard* guide.
- Do you want to create RFQs to route to specific vendors? Do you want to create RFQs for those vendors that responded in the affirmative on a corresponding Invitation to Bid? Do you want to place the Bid Package document on the Plan Room Dashboard and have vendors create "self-service" RFQs? How you proceed depends on the answer to this question.

Create and Route RFQs

If you are not using the Plan Room Dashboard, but rather want to create RFQs for specific vendors and route those RFQs to those vendors, you will use the RFQs tab on the Bid Package document.

Before you do, you should

- Make sure you have at least one Item. You will not be able to add to the RFQs tab without an Item.
- Make sure everything is ready on the Bid Package document. Once you create RFQs, changes made to the Bid Package are not reflected in the RFQs.
  Note: Additional information after the fact can be included in a Bid Package Addendum, created from the Bid Package Options menu. The **Create Bid Package Addendum** choice will appear once the Bid Package is no longer In Process.



- (*optional*) If you want to create RFQs for those vendors that responded in the affirmative on an Invitation to Bid, you must attach the Invitation to Bid document to the Bid Package (see next page).
- Change the status to **Accepting Bids** and save.

Attaching the Invitation to Bid

In order to automatically create RFQs for those vendors that responded in the affirmative on an Invitation to Bid, you must attach that Invitation to Bid onto the Bid Package.

☞ **KBA-01710: Attaching Invitation to Bids onto Bid Packages**

The RFQs Tab

☞ **KBA-01712: Adding RFQs to the Bid Package**

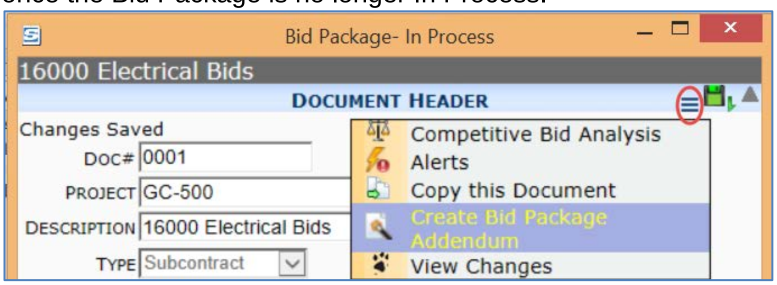
☞ **KBA-01713: Routing (Sending) RFQs from the Bid Package**

Plan Room Dashboard

If you want your vendors to log into Spitfire, create RFQ documents and enter their information directly onto those RFQ documents, you will use the Plan Room Dashboard.

Before you do, you should

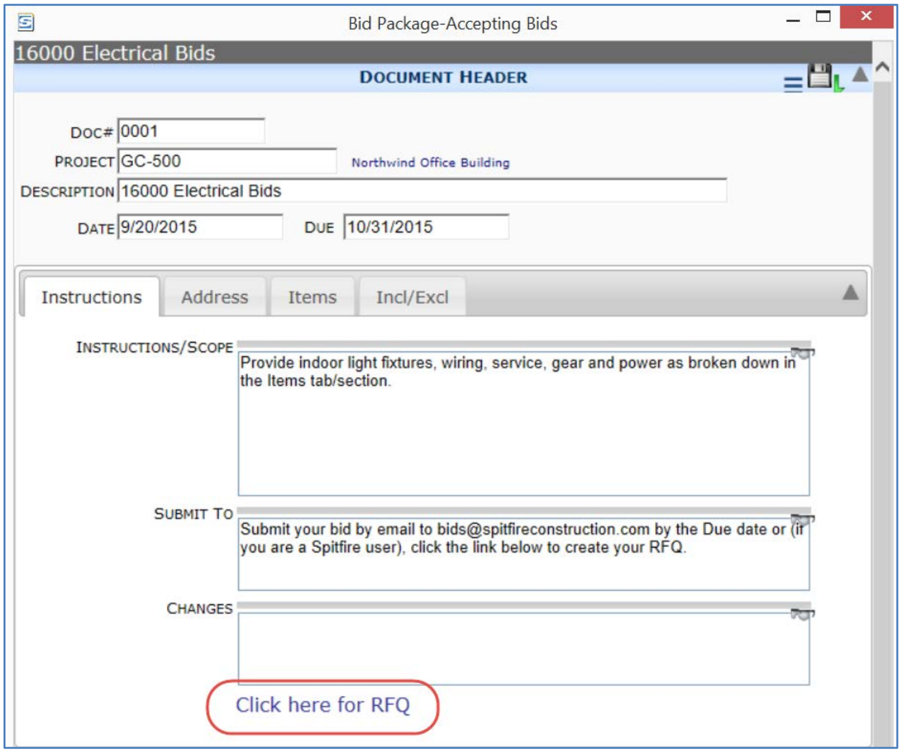
- Make sure everything is ready on the Bid Package document. Vendors will be viewing only accessible parts of the document. (For example, vendors do not see the RFQs tab.)
  Note: Additional information after the fact can be included in a Bid Package Addendum, created from the Bid Package Options menu. The **Create Bid Package Addendum** choice will appear once the Bid Package is no longer In Process.

  - Change the status of the Bid Package Addendum to **Published** to include it on the Plan Room Dashboard.
- Change the status of the Bid Package to **Accepting Bids** and save. Accepting Bids is a status (equivalent to Published) that automatically publishes the document on the Plan Room Dashboard.
- Change the status of any related Drawings documents to **Published** and save to include the document on the Plan Room Dashboard.

Once a document is included on the Plan Room Dashboard, its attachments can be opened and viewed by any vender. The document itself can be opened and viewed from the Plan Room by any vendor who has been given rights to view the document.

Note: Vendors can create an RFQ document from the Bid Package document using the self-service **Click here for RFQ** link (shown on the next page). These RFQ documents are not listed on the Plan Room Dashboard, but are accessible from the Project Dashboard and Spitfire Catalog.



For more information about the Plan Room setup and use, see the *Setup for Spitfire's Plan Room* technical white paper and *How to Use the Plan Room (from a vendor login)*. The How To paper is available as a download.

The RFQ Document

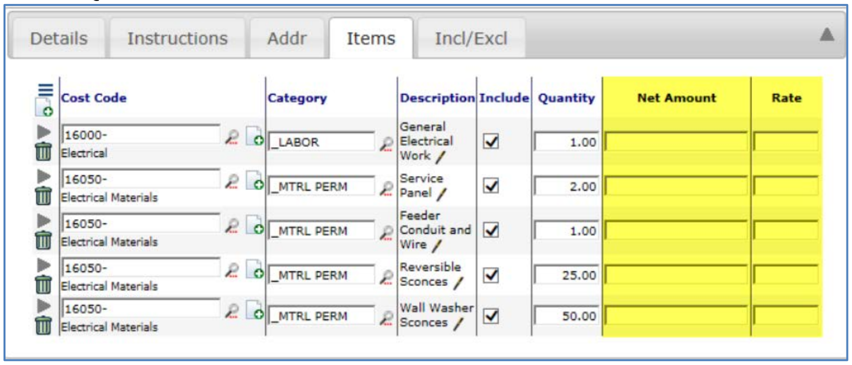
Info From Bid Package

RFQs that are created from a Bid Package (whether from the RFQ tab or the self-service link) carry the following information from the Bid Package:

- The **Description**
- The **Type**
- The **Contract Type**
- The **Due** Date
- The notes from the **Instruction** tab
- The **Items**
- Everything on the **Incl/Excl** tab
- Attachment **templates**
- Files in the **Attachment** tab (plus the Bid Package document)

Vendor Data

The **Net Amount** and **Rate** for each Item is entered on the Item tab of the RFQ document.

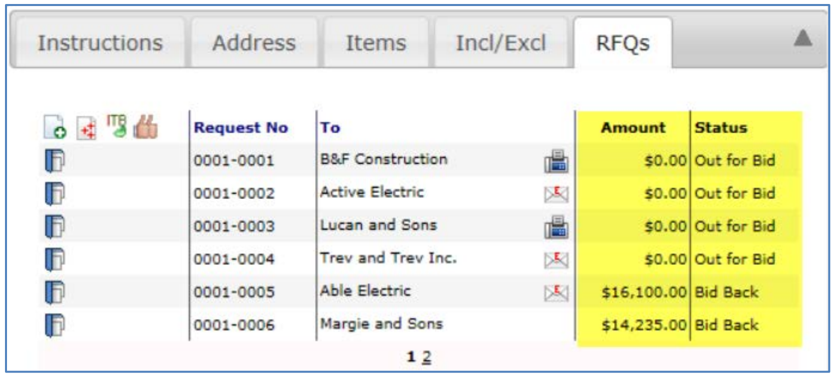


Note: you may want to indicate that vendor information has been entered on the RFQ document by changing the document status to **Bid Back.**

Review of RFQs

Whether created on the RFQ tab or through the self-service link, RFQs created from the Bid Package are listed on the Bid Package's RFQs tab. Each time the Bid Package is refreshed (saved), the status and quote amounts for the RFQs are updated.

(Remember that vendors do not see the RFQs tab on the Bid Package.)



Request No	To	Amount	Status
0001-0001	B&F Construction	$0.00	Out for Bid
0001-0002	Active Electric	$0.00	Out for Bid
0001-0003	Lucan and Sons	$0.00	Out for Bid
0001-0004	Trev and Trev Inc.	$0.00	Out for Bid
0001-0005	Able Electric	$16,100.00	Bid Back
0001-0006	Margie and Sons	$14,235.00	Bid Back

1 2

The RFQs tab allows you to quickly review total quote amounts from those vendors who responded to your bid request.

Another tool that you can use to review quotes is the Competitive Bid Analysis workbook.

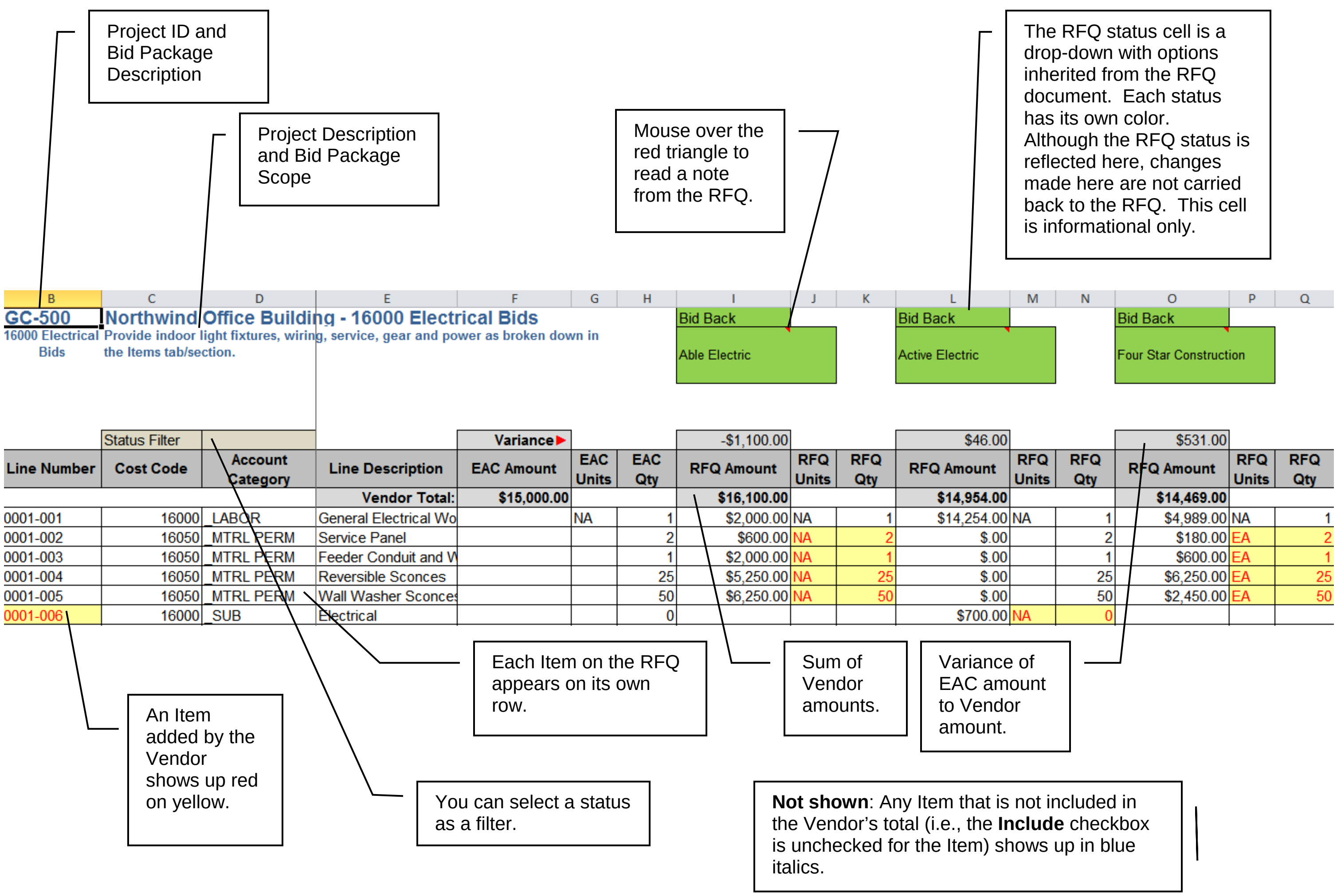
Competitive Bid Analysis

The Competitive Bid Analysis workbook can be viewed for one Bid Package or for all Bid Packages on your project.

Prerequisite: a Bid Analysis template in your Template library (in the Manage Dashboard.)

☞ **KBA-01714: Opening the Competitive Bid Analysis Workbook.**

Bid Package Worksheet



GC-500 Northwind Office Building - 16000 Electrical Bids
16000 Electrical Bids
Provide indoor light fixtures, wiring, service, gear and power as broken down in the Items tab/section.

B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
							Bid Back			Bid Back			Bid Back		
							Able Electric			Active Electric			Four Star Construction		
	Status Filter			Variance			-$1,100.00			$46.00			$531.00		
Line Number	Cost Code	Account Category	Line Description	EAC Amount	EAC Units	EAC Qty	RFQ Amount	RFQ Units	RFQ Qty	RFQ Amount	RFQ Units	RFQ Qty	RFQ Amount	RFQ Units	RFQ Qty
			Vendor Total:	$15,000.00			$16,100.00			$14,954.00			$14,469.00		
0001-001	16000	_LABOR	General Electrical Wo		NA	1	$2,000.00	NA	1	$14,254.00	NA	1	$4,989.00	NA	1
0001-002	16050	_MTRL PERM	Service Panel			2	$600.00	NA	2	$.00		2	$180.00	EA	2
0001-003	16050	_MTRL PERM	Feeder Conduit and W			1	$2,000.00	NA	1	$.00		1	$600.00	EA	1
0001-004	16050	_MTRL PERM	Reversible Sconces			25	$5,250.00	NA	25	$.00		25	$6,250.00	EA	25
0001-005	16050	_MTRL PERM	Wall Washer Sconces			50	$6,250.00	NA	50	$.00		50	$2,450.00	EA	50
0001-006	16000	_SUB	Electrical			0				$700.00	NA	0			

Consolidation Worksheet

Each Competitive Bid Analysis workbook includes a Consolidation worksheet. This worksheet is particularly useful when you open Competitive Bid Analysis from the Project Dashboard and have several Bid Packages documents on your project.

- To switch to the Consolidation sheet, click the Consolidated tab:

0001 16000 Electrical Bids | RFQ Log | Consolidated

Competitive Bid No	Total →	EAC Amount	Selected Vendor	RFQAmount	Variance
		$192,361.00		$37,300.61	$155,060.39
0001	16000 Electrical	$119,211.00			$0.00
0002	15000 Mechanical	$73,150.00	Consolidated Plumbing	$37,300.61	$35,849.39

Each Bid is listed as one row. The Bid No., Bid Description and EAC Amount is listed

The data related to the RFQ with the status of "Awarded" is transfered to this worksheet.

The Variance column is difference between the RFQAmount and the EAC Amount.

RFQ Log

The RFQ Log worksheet provides a summary by vendor of all line items.

- To switch to the RFQ Log sheet, click the RFQ Log tab:

0001 16000 Electrical Bids | RFQ Log

Project ID: GC-500 Project Description: Northwind Office Building

Project Company: CCC Northwind Trade Union

Doc #	Bid Package Title	Union	Route Via	Sent Date & Time	Company	Contact
0001	16000 Electrical Bids		E		Able Electric	Able Electric
0001	16000 Electrical Bids		W		Active Electric	Margie and Sons
0001	16000 Electrical Bids		H		Margie and Sons	Wingtip Engineers
0001	16000 Electrical Bids		H	10/8/12 11:5 AM	Wingtip Engineers	Active Electric

The color of the row indicates the status of the RFQ.

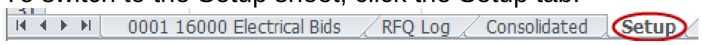
The Doc status appears as a code, e.g., I = In Process, O = Out for Bid, etc.

Phone	Fax	e-mail	Amount	Status	NoteA
(555) 555-1212	(555) 555-1212	jsunderson@ableelec.com	$0.00	I	Submit your bid by email to
(555) 555-1212	(555) 555-1212		$0.00	O	bids@spitfireconstruction.com by the Due date or (if you
(555) 555-1212	(555) 555-1212		$0.00	I	are a Spitfire user), click the link below to create your
	(555) 555-1111		$0.00	I	RFQ.

Setup

The Setup worksheet allows you to change the width, name and visibility of the columns on the Bid, RFQ Log and Consolidated worksheets; the worksheet tab names; the colors for the different Doc statuses; and whether the workbook should open on the RFQ Log worksheet.

- To switch to the Setup sheet, click the Setup tab:



This worksheet allows the user to set parameters used on other workseets.

Tab Name controlled by Spitfire			
Bid Base	Description	Width	Visible
Line Number	Line Number	14	Y
Cost Code	Cost Code	14	Y
Account Category	Account Category	16	Y
Line Description	Line Description	20	Y
EAC Amount	EAC Amount	16	Y
EAC Units	EAC Units	6	Y
EAC Qty	EAC Qty	8	Y
RFQ Amount	RFQ Amount	16	Y
RFQ Units	RFQ Units	6	Y
RFQ Qty	RFQ Qty	8	Y

Tab Name	RFQ Log		
RFQ Log	Description	Width	Visible
Bid Set No	Doc #	6	Y
Bid Set Name	Bid Package Title	45	Y
Bid Union	Union	6	Y
Bid Route	Route Via	10	Y
Bid Sent Date	Sent Date & Time	18	Y
Bid Company	Company	30	Y
Bid Contact	Contact	30	Y
Bid Phone	Phone	15	Y
Bid Fax	Fax	15	Y
Bid Email	e-mail	35	Y
Bid Amount	Amount	18	Y
Bid Status	Status	10	Y
Bid Note	NoteA	30	Y

Tab Name	Consolidated		
Consolidated	Description	Width	Vis
Bid Set No	Competitive Bid Number	15	
Bid Set Name		30	
EAC Amount	EAC Amount	18	
Selected Vendor	Selected Vendor	30	
RFQ Amount	RFQ Amount	18	
Variance	Variance	18	

Code	Spitfire Default Term
A	Awarded
B	Bid Back
D	Declined to Bid
I	In Process
O	Out for Bid
R	Rejected
X	Canceled

Other Info:	
Open On RFQ_Log	

Awarded RFQs to Commitments

When it is time, awarding one of the RFQs and creating the Commitment document for that vendor is a fairly simple process.

☞ **KBA-01715: Awarding RFQs and Creating Commitments from Bid Packages**

Info From Bid Package

Commitments that are created from an awarded RFQ carry the following information from the Bid Package:

- The **Description** (combined with the Vendor name from the RFQ)
- The **Type**
- The **Contract Type**
- Certain notes from the **Instructions** tab (appearing on the **Scope** tab)
- The **Items** (with amounts from the RFQ)
- Everything on the **Incl/Excl** tab

You can add information to the Commitment, route it and change its status as appropriate. For more information about the Commitment Doc type, see the *Focus on Doc Types and Project Workflow* guide.

Closing the Bid Package

Once you have awarded one (or more) of the RFQs on the Bid Package, you can close the Bid Package to make it read-only.

☞ **KBA-01716: Closing Bid Packages Best Practices**

Setup for the Bid Package Workflow

In order for the Bid Package – RFQ – Commitment workflow to function as described, some set up is required at your site. Your implementer may also have other suggestions.

Plan Room

If you want to use the Plan Room Dashboard, see the *Setup for Spitfire's Plan Room* technical white paper also.

- Set up access to the Plan Room.
- Set your Bid Package, RFQ or other appropriate Doc type to be included in the Plan Room, and set up Plan Room-enabled statuses for each.

Cloud Storage

If you want to use Cloud storage, see the *Setup for Cloud Drive Integration* technical white paper also.

- Set your Bid Package, RFQ or other appropriate Doc type to be cloud-enabled, and set up cloud-enabled statuses for each.

Summary of Workflow Setup

- Give a **Vendor RFQ Respondee** role to vendor Contacts.
- Create predefined routes for the RFQ Doc type.
- Create and upload templates for the Bid Package and RFQ Doc types.
- Set up helpful rules.

The Roles Tool

You want a role to identify Contacts at each of your vendors so that when RFQs are routed to your vendor companies, they actually go to a specific person at that company. We use **Vendor RFQ Respondee** as an example

- Review the distributed **Vendor RFQ Respondee** role to see if any changes are required. By default, this role has no Capabilities, Responsibilities or Sub Roles.

Contacts Dashboard

All vendors who may be selected to receive an RFQ should have the aforementioned **Vendor RFQ Respondee** role.

- Review your vendor Contacts and give the **Vendor RFQ Respondee** role to any who are missing this role.

Routes Tool

Once you have the **Vendor RFQ Respondee** role assigned to the individuals at your vendor companies, you can use that role in a predefined route for the RFQ Doc type. Otherwise, routed RFQ documents will go to the primary vendor company's email. In addition, the predefined route will allow you to use a Spitfire workflow script to change the RFQ status when the document is routed.

- You may already have a predefined route for RFQs. Review your predefined routes to see if any changes are required.
- By default, this predefined route has a Spitfire workflow script at Seq 2 that changes the status of the RFQ document to "Out to Bid" when it is first routed.
- Note that the Vendor RFQ Respondee role at Seq 3 has **At Source Contact** checked (on). This means that only the person at the company indicated as the source contact (i.e., vendor) for the RFQ will be added to the route.
- The Doc Entered By role at Seq 5 ensures that the RFQ document will be routed back to whoever created the RFQ.
- RFQ as the Doc Type is the only rule required for this predefined route.

Templates

If you will be routing RFQs via email or hard copy, you will need an Attachment template and/or Transmittal template for the RFQs. You can create and upload several templates, if appropriate.

If vendors will be accessing the Bid Package on the Plan Room or cloud drive, you will need an Attachment template for the Bid Package.

In addition, you might want to take advantage of the Via Excel option for adding Items to your Bid Package or editing Items on your RFQs.

Rules

There are several rules, established through the Rules Maintenance tool on the System Admin Dashboard, which can improve the Bid Package – RFQ workflow.

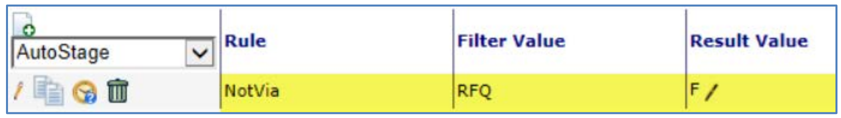
DocTypeConfig | HardCopyThru

If you may have Hard Copy routees on your RFQs and you are using a predefined route (such as the one described previously), you can have sfPMS insert another routee before each Hard Copy routee. In this way, the RFQ will be routed to the specified Spitfire user whenever he or she needs to print the RFQ in order to deliver it to a Hard Copy routee.

	Rule	Filter Value	Result Value
	HardCopyThru	RFQ	Elizabeth Keyser-Rubble

RouteConfig | NotVia

You can prevent a certain Doc type, such as RFQ, from being routed in a particular way (via email or via fax). For example, if you don't want any Vendor Contacts to receive the RFQ via fax, you can indicate this through the **NotVia** rule. Then, if sfPMS were to encounter a Via Fax routee, it would convert that routee to a Via Hard Copy routee.



WhenDocClosed | ApplyChildDoc Status *and* ChildDocStatus

You can tell sfPMS to change the status of RFQs when you change the status of the parent Bid Package document to **Closed**. Two rules are required to set this up. The first is the ApplyChildDocStatus.

Then, you can choose what status all open RFQs should have when the Bid Package is **Closed**.