



CLIENT GUIDE TO BID MANAGEMENT

PROCESSWIRE
CMS PORTAL
REDESIGN 2018



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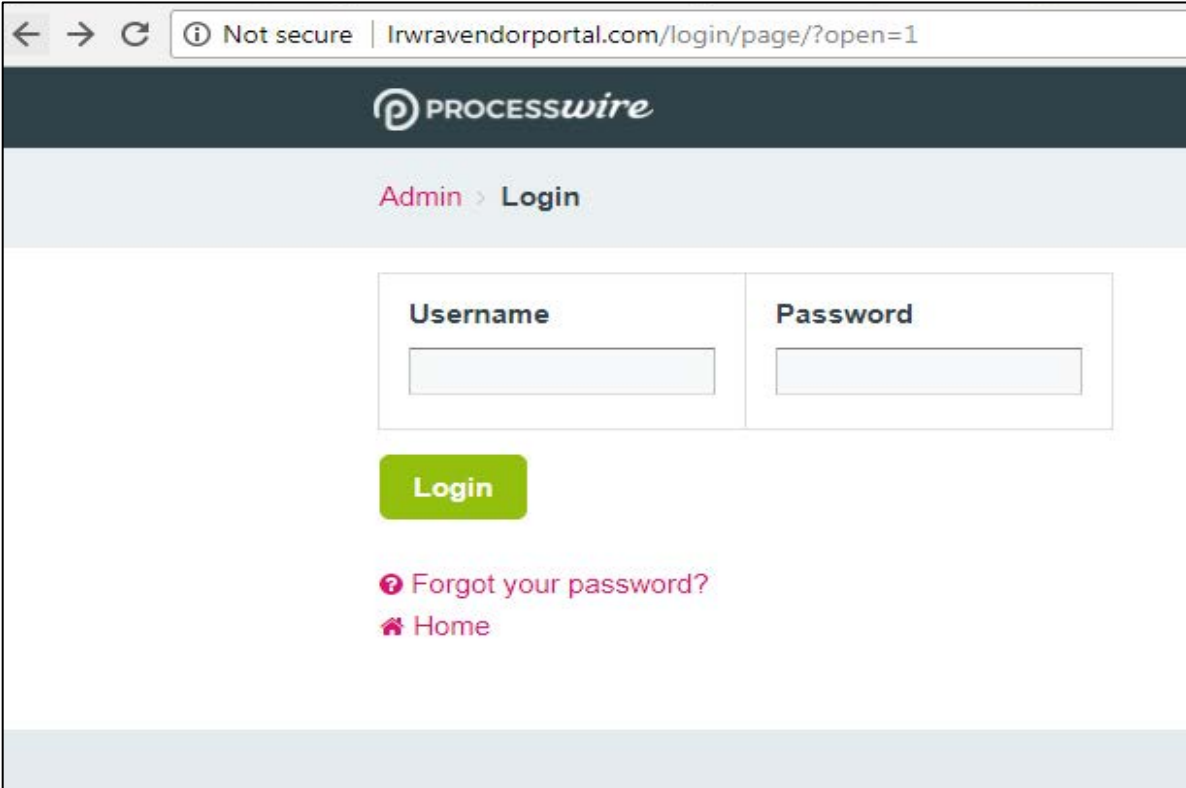


ACTION: ACCESSING THE ADMINISTRATORS' PORTAL

STEP 1:

To navigate to administrative access to add, edit or view current bids connect type the following link into your browser: lrwrvendorportal.com/login/.

Once there, you will see this screen requesting your username and password.



The screenshot shows a web browser window with the address bar displaying "Not secure | lrwrvendorportal.com/login/page/?open=1". The page header features the "PROCESSwire" logo. Below the header, the navigation path "Admin > Login" is shown. The main content area contains two input fields: "Username" and "Password". Below these fields is a green "Login" button. At the bottom of the form area, there are two links: "Forgot your password?" and "Home".

STEP 2:

Enter the following information:

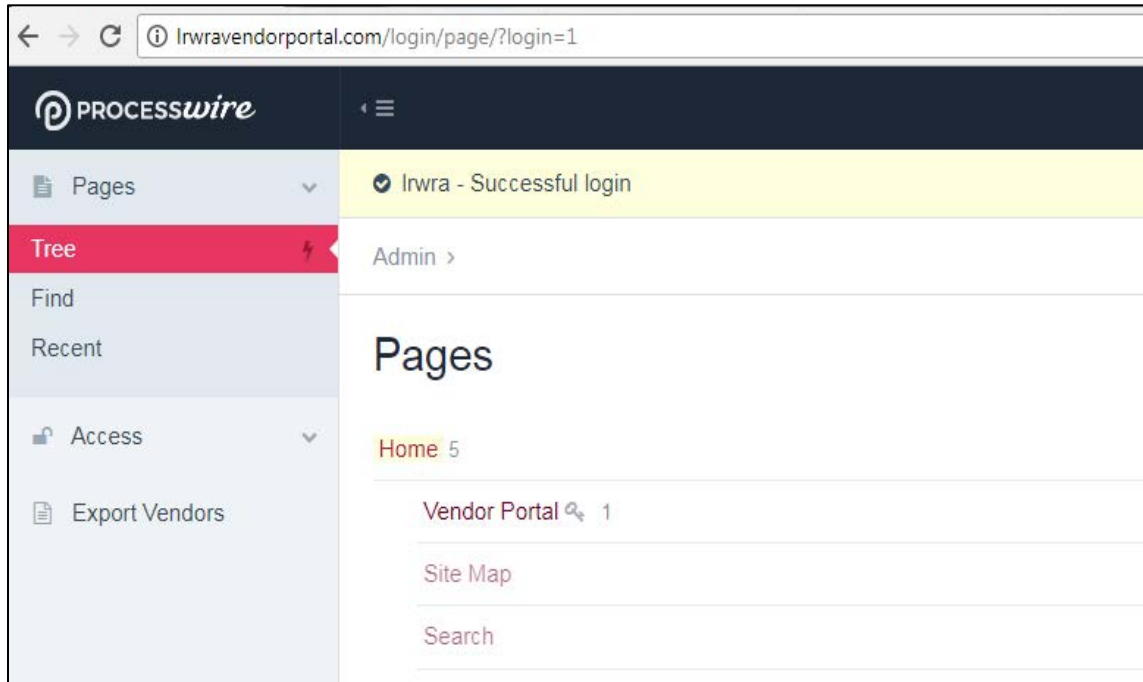
Username: lrwra

Password: 11clearwater

*Please note, these logins can be customized for different users.

STEP 3:

Next, you will land on the following page:



From this “Home” page screen for administrators, you can complete the following actions:

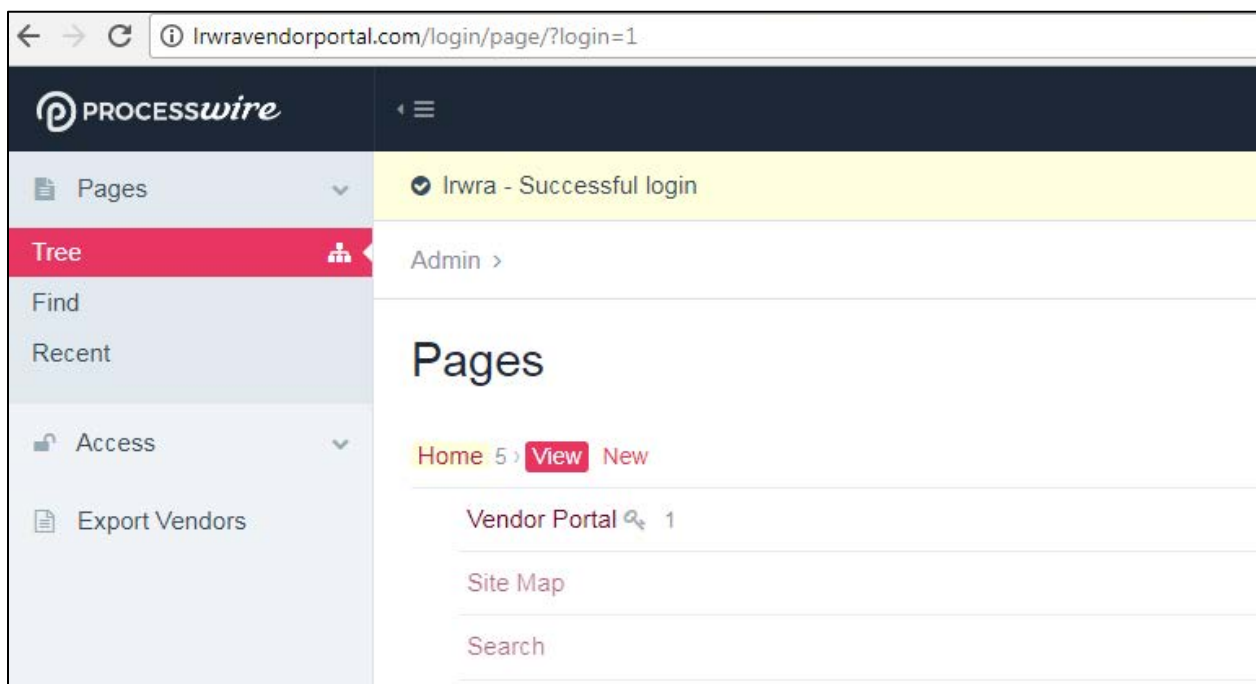
1. View a listing of all active bids
2. Post, publish and send bids to vendors
3. Edit bids

ACTION: VIEWING ALL ACTIVE BIDS (WHILE LOGGED IN AS AN ADMINISTRATOR)

STEP 1: VIEWING ALL ACTIVE BIDS (WHILE LOGGED IN AS AN ADMINISTRATOR)

To view all active bids, hover over the “Home” tab until you see the menu options “View” and “New” to the right of this tab. Once these options appear, select “View.”

Your screen should appear as follows:



STEP 2: VIEWING ALL ACTIVE BIDS (WHILE LOGGED IN AS AN ADMINISTRATOR)

Once you have selected and clicked on the “View,” tab you will be directed to the following page, “Current Solicitations,” where you can view a complete list of all active bids:



SOLICITATIONS

VIEW: All Bids RFPs RFQs



HELPFUL LINKS

LRWRA-18-002 EQUIPMENT TRAILERS (SMALL)

BID Submission Deadline: 2:00 pm, Mar 1, 2018

VIEW

[Become a Vendor](#) ▶

[LRWRA Main Site](#) ▶

LRWRA-18-001 GAS LEAK DETECTION SENSORS

BID Submission Deadline: 2:30 pm, Mar 6, 2018

VIEW

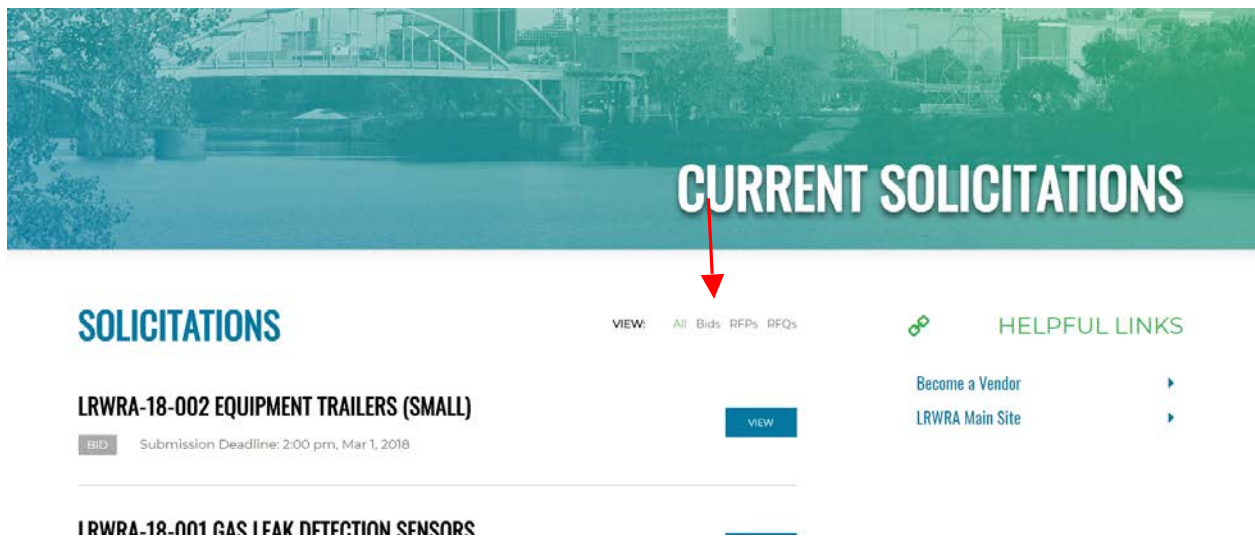
ACTION: VIEWING BIDS BY TYPE

STEP 1: VIEWING BIDS BY TYPE

From “Current Solicitations” page, you can also view current bids by type.

Simply click on one of the options in the menu indicated by the arrow to select a bid opportunity by its classification as a Bid, RFP, or RFQ.

ALL BIDS:



CURRENT SOLICITATIONS

SOLICITATIONS

VIEW: All Bids RFPs RFQs

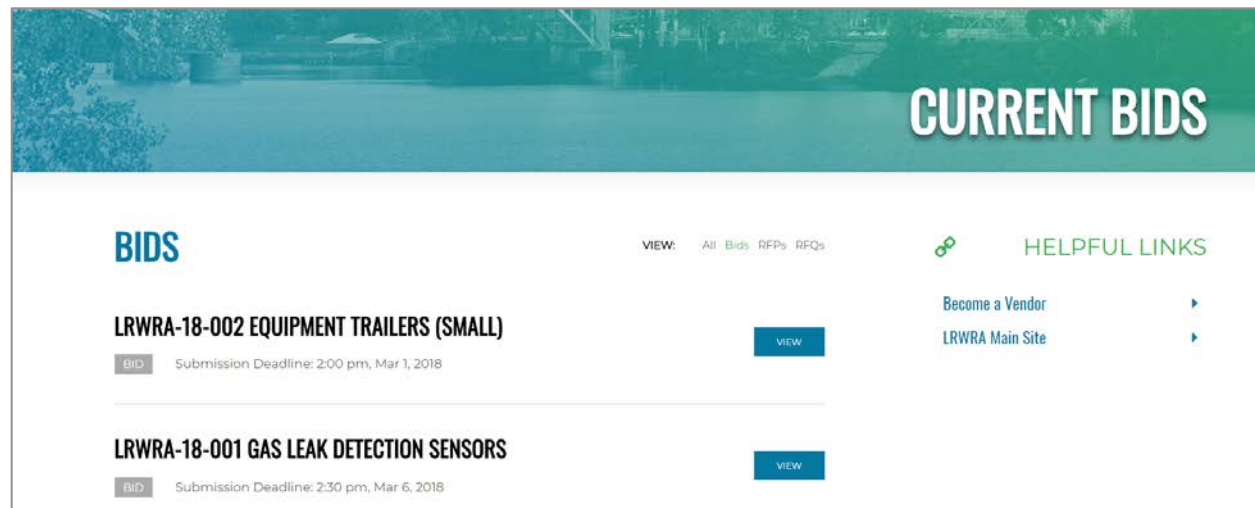
LRWRA-18-002 EQUIPMENT TRAILERS (SMALL)
BID Submission Deadline: 2:00 pm, Mar 1, 2018 [VIEW](#)

LRWRA-18-001 GAS LEAK DETECTION SENSORS [VIEW](#)

HELPFUL LINKS

- Become a Vendor ▶
- LRWRA Main Site ▶

BIDS



CURRENT BIDS

BIDS

VIEW: All Bids RFPs RFQs

LRWRA-18-002 EQUIPMENT TRAILERS (SMALL)
BID Submission Deadline: 2:00 pm, Mar 1, 2018 [VIEW](#)

LRWRA-18-001 GAS LEAK DETECTION SENSORS
BID Submission Deadline: 2:30 pm, Mar 6, 2018 [VIEW](#)

HELPFUL LINKS

- Become a Vendor ▶
- LRWRA Main Site ▶

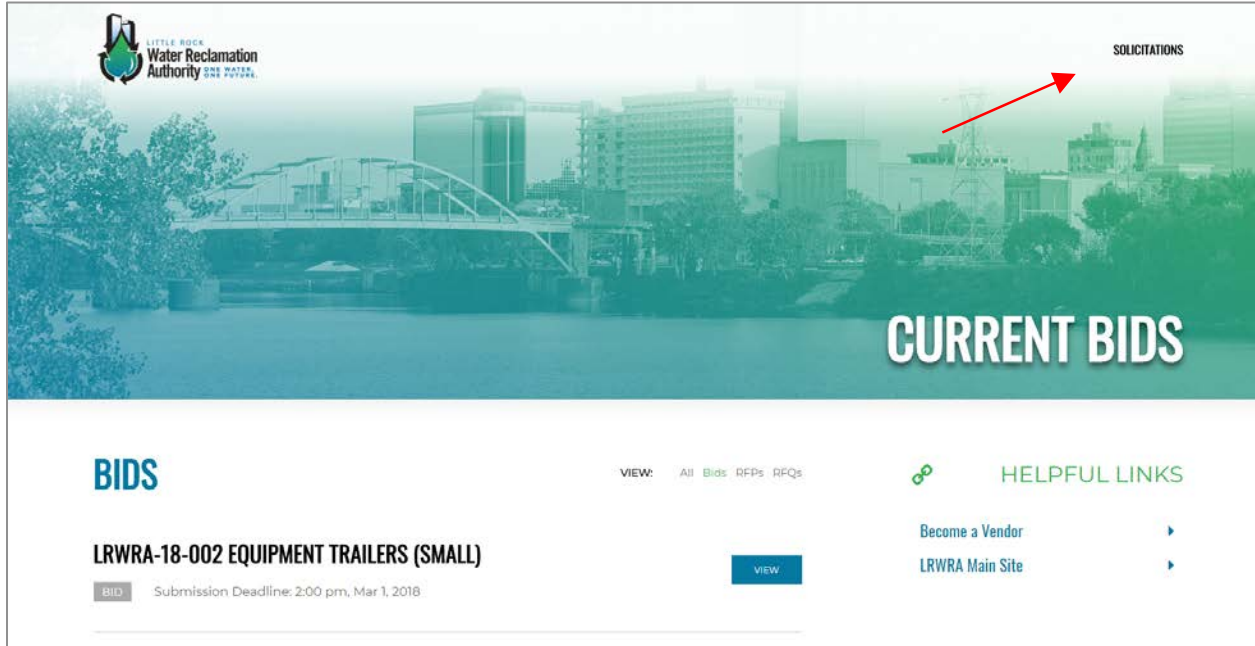
RFPs

The screenshot shows a web browser window with the URL lnravendorportal.com/vendor-portal/solicitations/rfps/. The page features the Little Rock Water Reclamation Authority logo and a navigation menu with 'SOLICITATIONS' and 'LOG OUT'. A large banner image of a bridge over a river is overlaid with the text 'CURRENT RFPs'. Below the banner, the page is titled 'RFPs' and includes a filter menu with 'VIEW: All Bids RFPs RFQs'. A list of RFPs is displayed, with the first entry being 'LRWA-17-023 LAWN MAINTENANCE SERVICES', dated February 28, 2018, with a 'VIEW' button and contact email 'procurement@lrwa.com'. To the right, there are sections for 'HELPFUL LINKS' (with an 'Edit Profile' link) and 'CONTACT US' (with contact information for Amber Yates).

RFQs

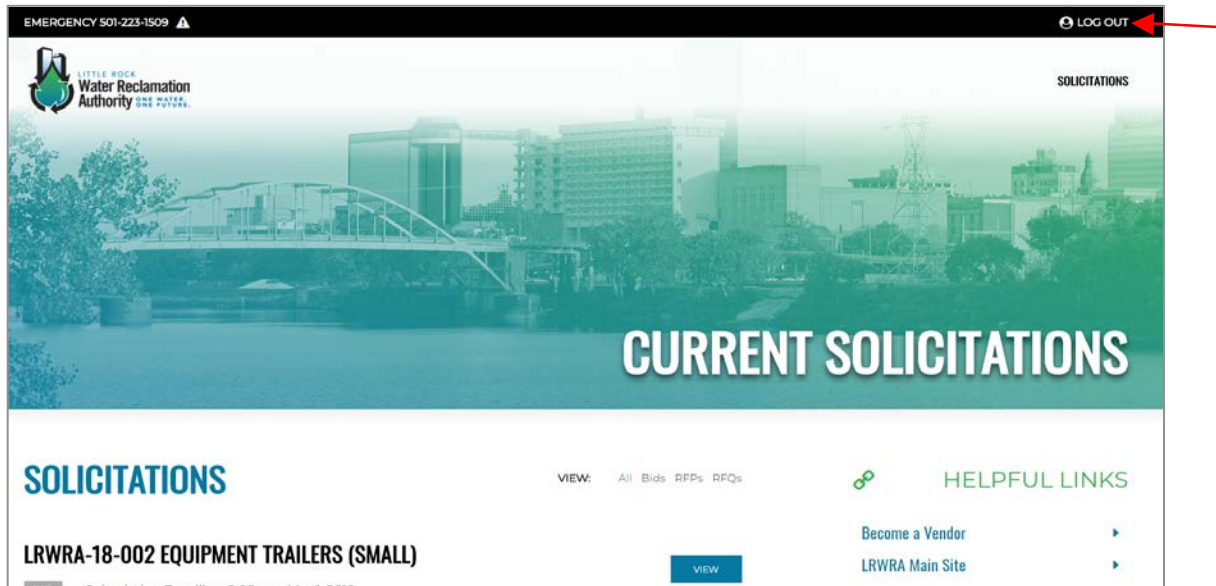
The screenshot shows a web browser window with the URL lnravendorportal.com/vendor-portal/solicitations/rfq/. The page features the Little Rock Water Reclamation Authority logo and a navigation menu with 'SOLICITATIONS' and 'LOG OUT'. A large banner image of a bridge over a river is overlaid with the text 'CURRENT RFQs'. Below the banner, the page is titled 'RFQs' and includes a filter menu with 'VIEW: All Bids RFPs RFQs'. A list of RFQs is displayed, with the first entry being 'LRWA-18-004 COMMERCIAL INSURANCE BROKER', dated May 31, 2018, with a 'VIEW' button and contact email 'procurement@lrwa.com'. To the right, there are sections for 'HELPFUL LINKS' (with an 'Edit Profile' link) and 'CONTACT US' (with the text 'If you have any questions, please').

To navigate back to the complete list of bids after viewing bids by type, click the “Solicitations” button in the upper right hand corner of your screen.



FROM THE “CURRENT SOLICITATION” HOMEPAGE, YOU CAN ALSO:

-Logout



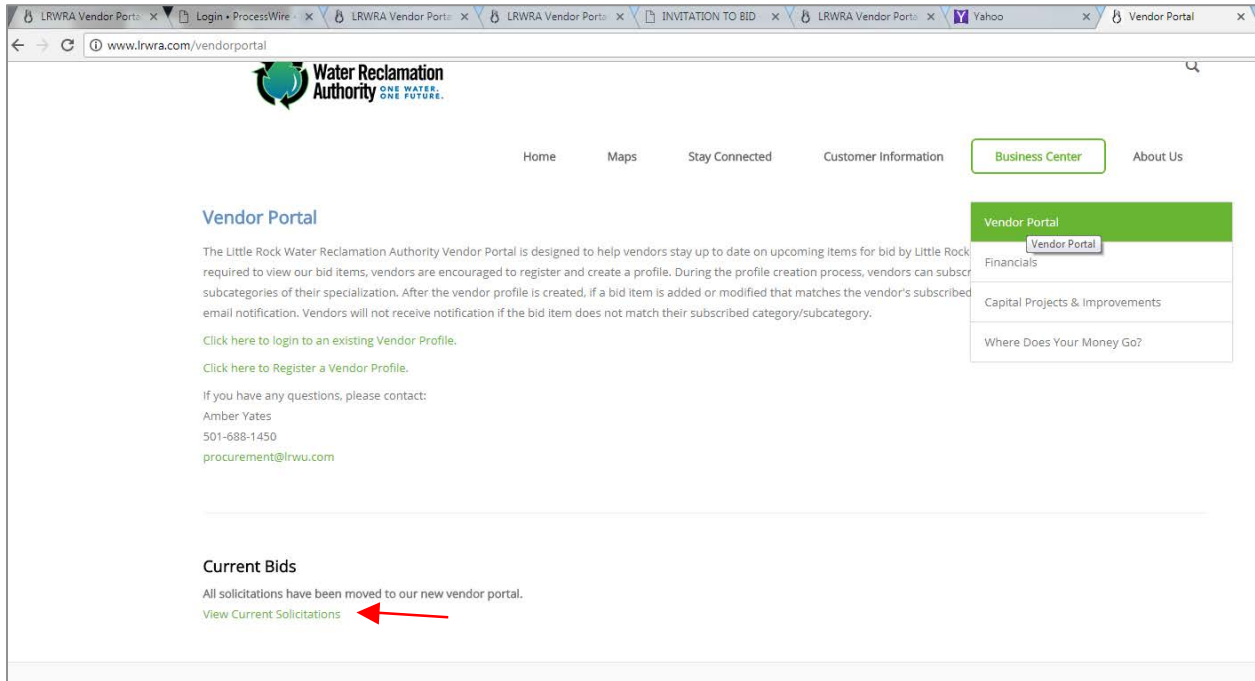
-View helpful links (we currently have no content for this)

The screenshot shows a web page titled "CURRENT SOLICITATIONS" with a teal header. Below the header, there is a "SOLICITATIONS" section on the left and a "HELPFUL LINKS" section on the right. The "SOLICITATIONS" section lists two items: "LRWRA-18-002 EQUIPMENT TRAILERS (SMALL)" and "LRWRA-18-001 GAS LEAK DETECTION SENSORS", each with a "VIEW" button and a submission deadline. The "HELPFUL LINKS" section includes "Edit Profile" and "LRWRA Main Site", both with right-pointing chevrons. A red arrow points to the "HELPFUL LINKS" header.

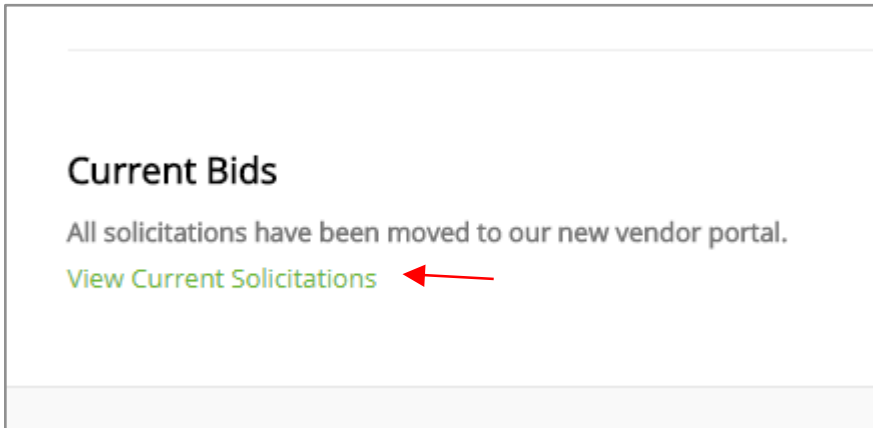
-Edit vendor profiles (if needed)

This screenshot is identical to the one above, but the red arrow points to the "Edit Profile" link in the "HELPFUL LINKS" section.

Keep in mind, a public view of all current bids is also available through the current website. Click on the “Business Center” tab on the main navigation of the current lrwra.com site, and select “Vendor Portal” from the dropdown.



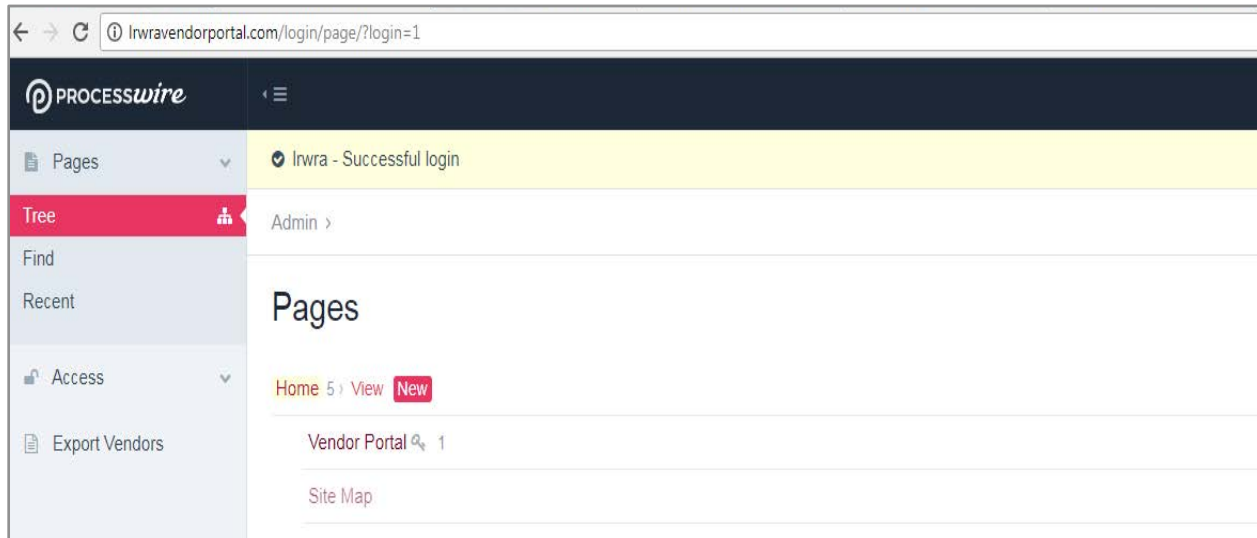
From this page, click on the link “View Current Solicitations.”



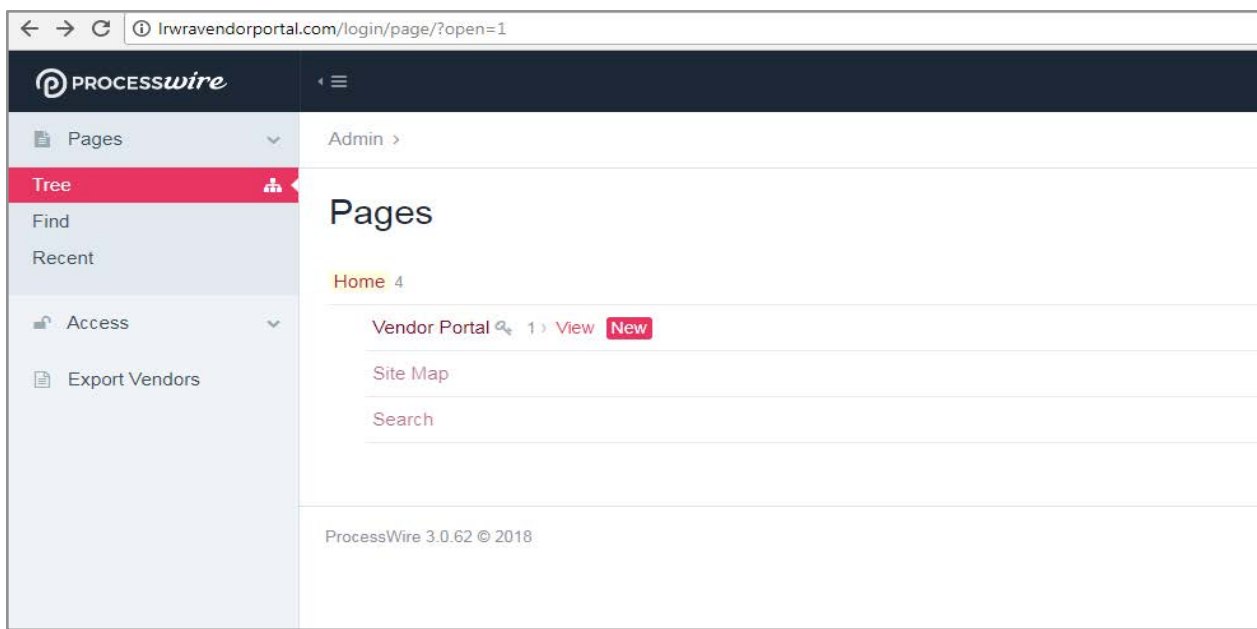
ACTION: ADDING BIDS

STEP 1: ADDING BIDS

To add a new bid, login to the Administrators' Homepage. You may add bids from the "Home" tab or the "Vendor Portal" tab. The steps are the same once you make a selection.

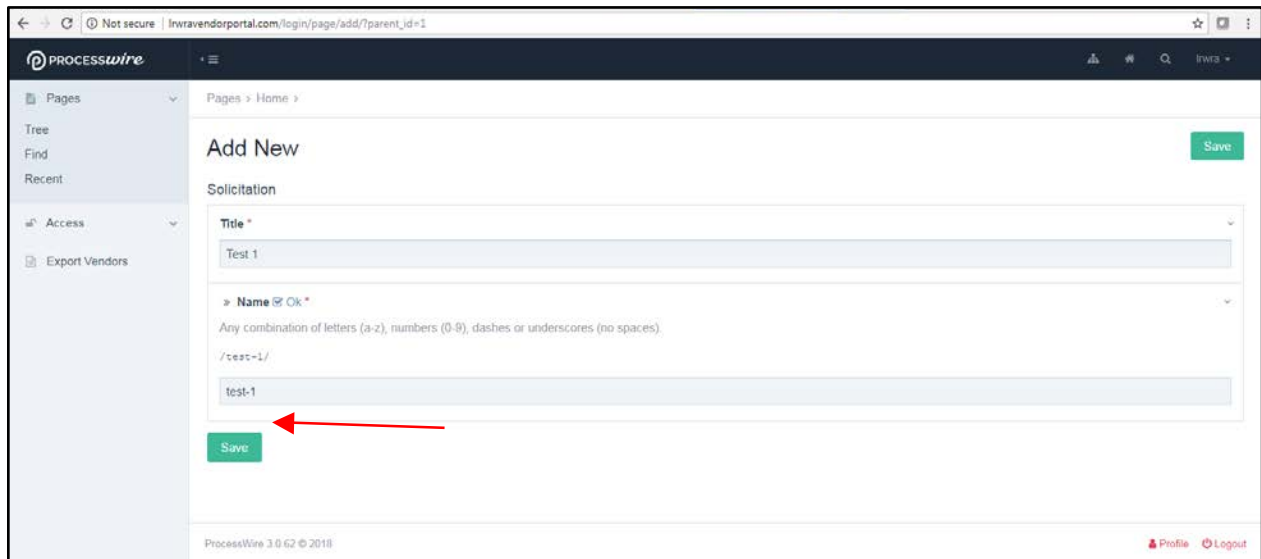


OR



STEP 2: ADDING BIDS

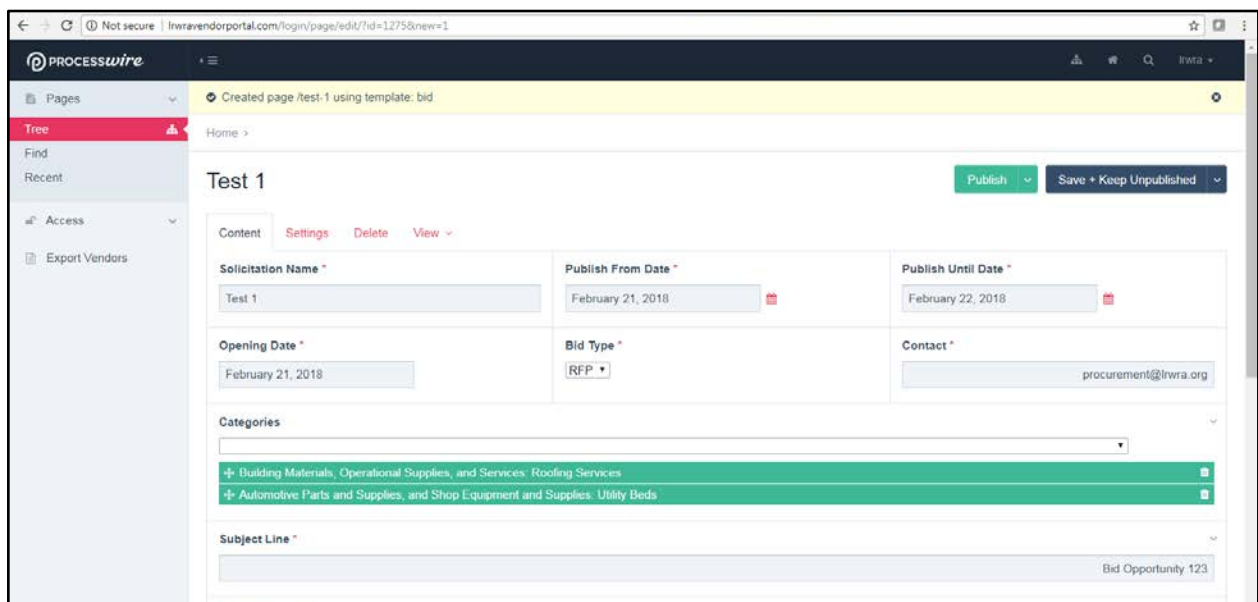
After you have selected the “New” option from either tab, you will be directed to a new screen asking you to name your bid. Name your bid based on the approved organizational format, and click “Save.”



The screenshot shows the 'Add New' form for a Solicitation in the ProcessWire system. The form has two main input fields: 'Title' and 'Name'. The 'Title' field contains 'Test 1'. The 'Name' field is labeled 'Name (Ok)' and contains the text '/test-1/'. Below the 'Name' field, there is a 'Save' button. A red arrow points to this 'Save' button. The browser address bar shows 'Inrvendorportal.com/login/page/add/?parent_id=1'. The ProcessWire logo and version '3.0.62 © 2018' are visible at the bottom.

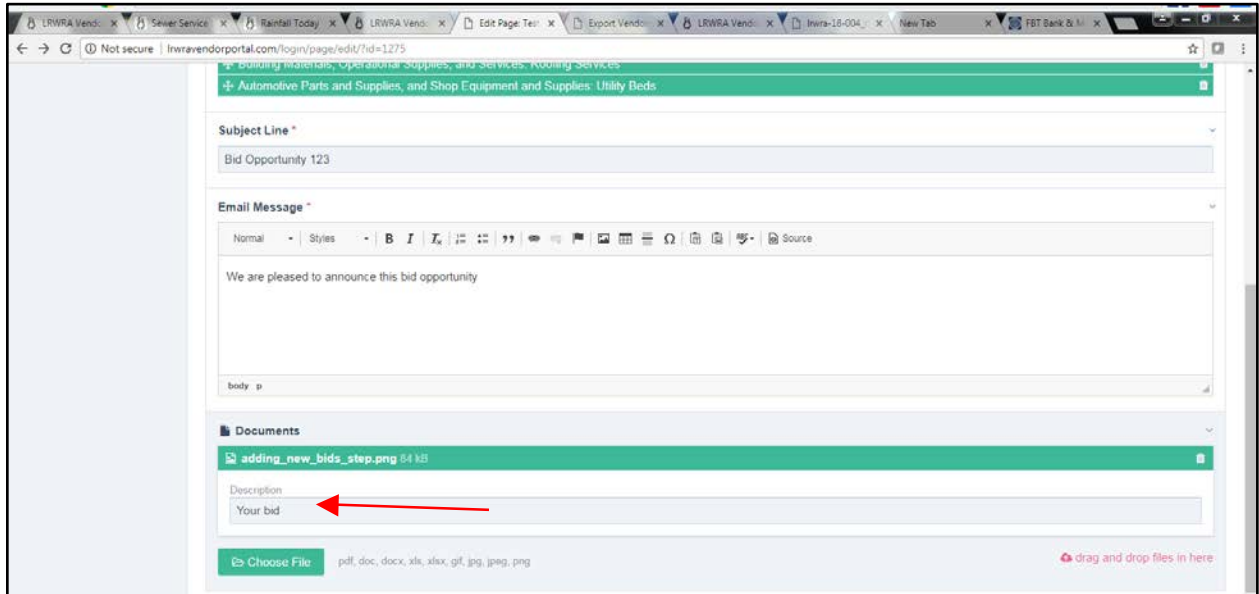
STEP 3: ADDING BIDS

Once you have named and saved your bid, you will be directed to this screen. At this step in the process, you will be allowed to enter all relevant information about your bid, including the publish dates (when these bids are active and viewable by the public and vendors), the opening date, bid type, contact information, etc. Please note, that with this system, you may select multiple categories in which your bid may fall.



The screenshot shows the 'Test 1' bid edit form in the ProcessWire system. The form is titled 'Test 1' and has a 'Publish' button and a 'Save + Keep Unpublished' button. The form is divided into several sections: 'Solicitation Name' (Test 1), 'Publish From Date' (February 21, 2018), 'Publish Until Date' (February 22, 2018), 'Opening Date' (February 21, 2018), 'Bid Type' (RFP), and 'Contact' (procurement@lwrwa.org). There are also 'Categories' and 'Subject Line' sections. The 'Categories' section shows two selected categories: 'Building Materials, Operational Supplies, and Services: Roofing Services' and 'Automotive Parts and Supplies, and Shop Equipment and Supplies: Utility Beds'. The 'Subject Line' section contains 'Bid Opportunity 123'. The browser address bar shows 'Inrvendorportal.com/login/page/edit/?id=1275&new=1'. The ProcessWire logo and version '3.0.62 © 2018' are visible at the bottom.

When adding documents, you must add a description to your document or it will not populate on the bid page. This will serve as the title of the document once users click through to see all information available about the bid.

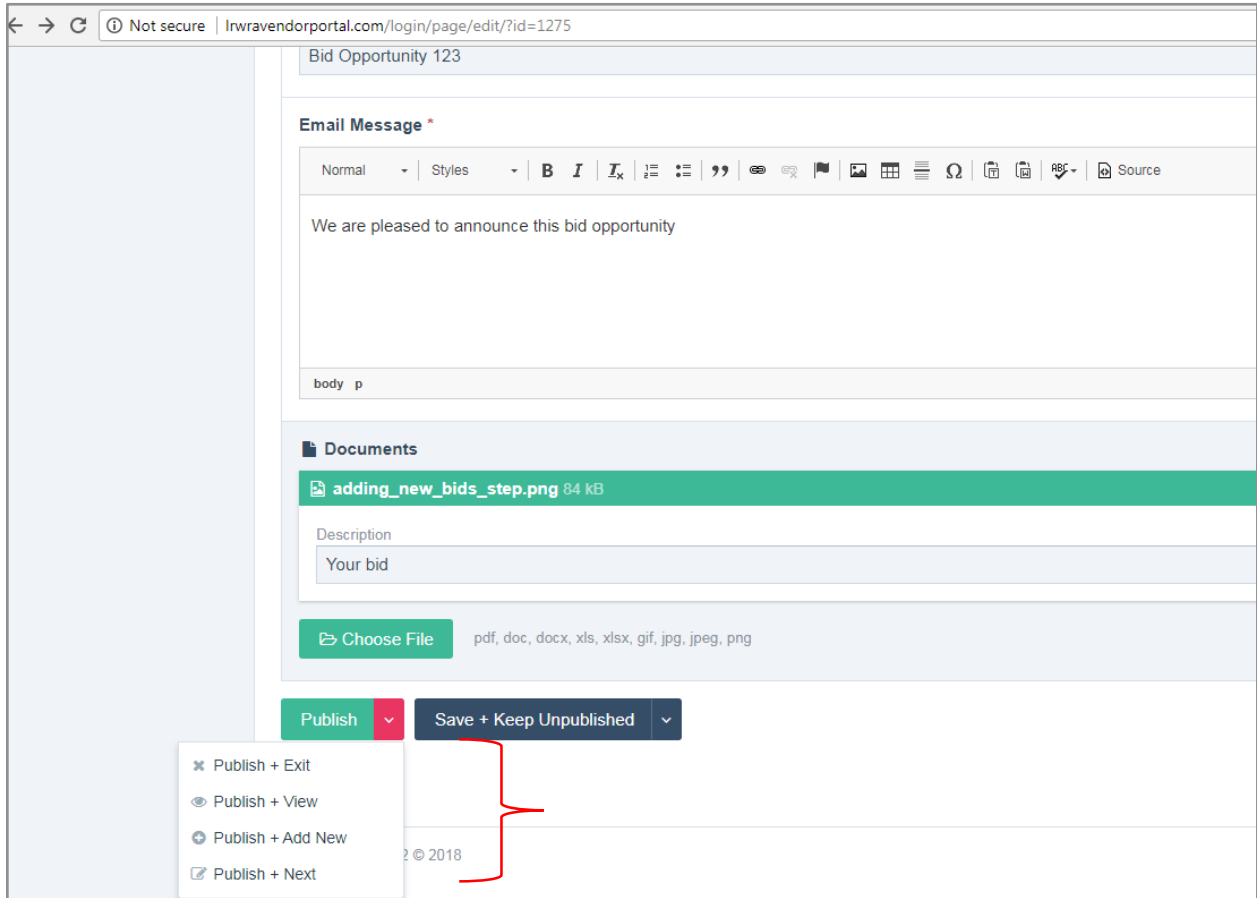


ACTION: POSTING BIDS

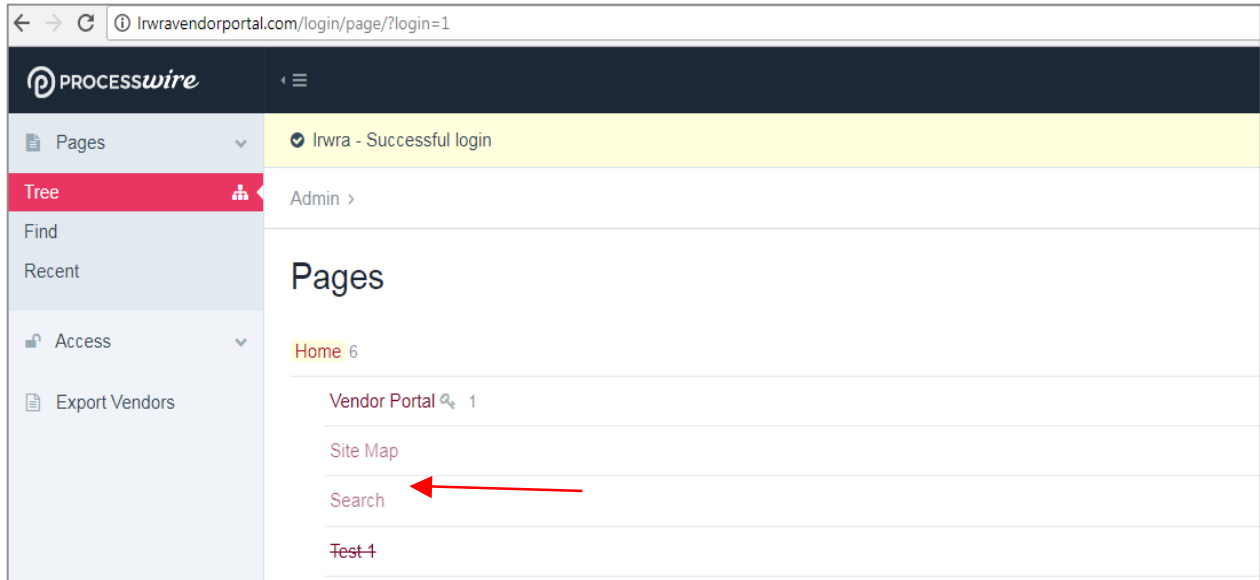
STEP 1: POSTING BIDS

Publishing your bid posts your bid to the “Current Solicitations” page which is viewable by the public at <http://lrwrvendorportal.com/vendor-portal/solicitations/> .

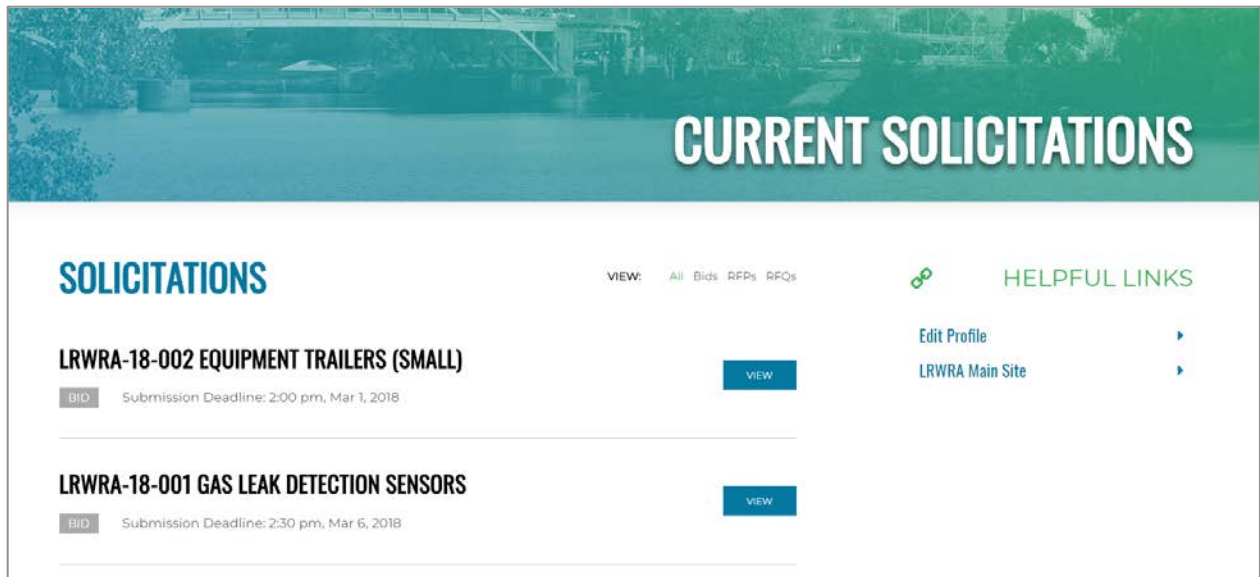
You have four options under the dropdown menu for “Publish:”



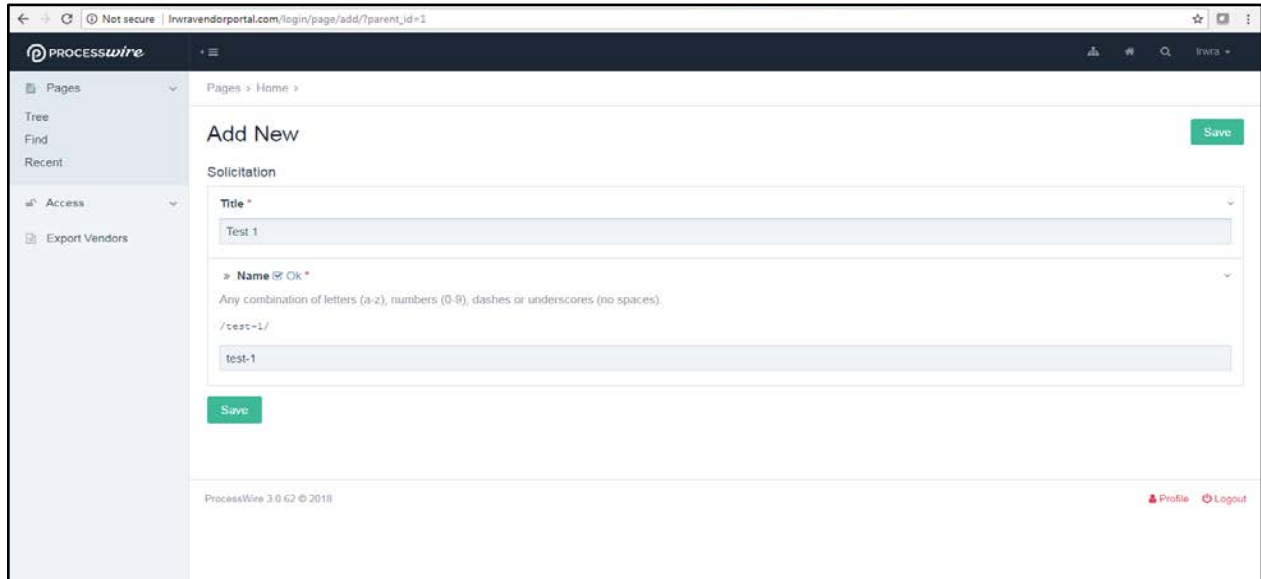
“Publish + Exit”: Publishes the bid to the “Current Solicitations” page and returns you to the Administrators’ Homepage, where your bid will be listed.



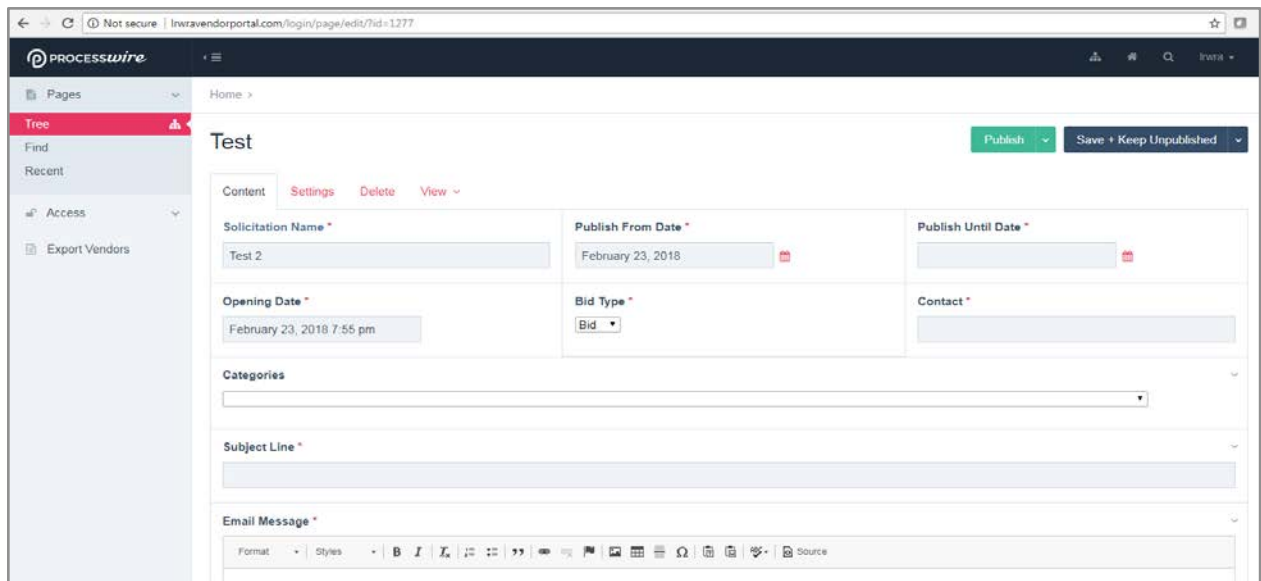
“Publish + View”: Publishes the bid to the “Current Solicitations” page and takes you to that page to view the posting.



“Publish + Add New”: Publishes the bid to the “Current Solicitations” page and takes you the “Add New” page to enter in another bid.



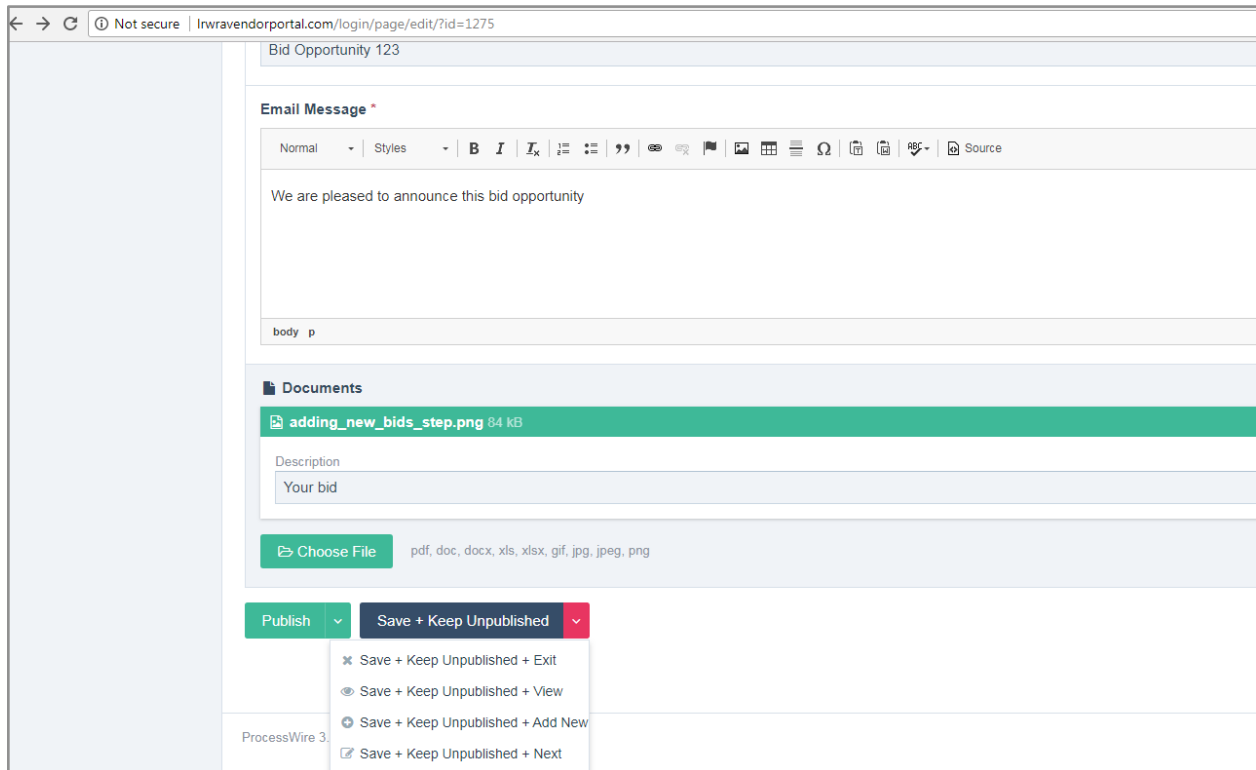
“Publish + Next”: Publishes the bid and allows you to see the next bid by date prior to your bid in the administrators’ screen.



ACTION: SAVING BIDS AS UNPUBLISHED

STEP 1: SAVING BIDS AS UNPUBLISHED

“Save + Keep Unpublished” allows you to completely enter a bid into the system without allowing it to be available for public viewing. This action also offers four options:



The screenshot shows a web browser window with the URL Inwrvendorportal.com/login/page/edit?id=1275. The page title is "Bid Opportunity 123". Below the title is an "Email Message" section with a rich text editor containing the text "We are pleased to announce this bid opportunity". Below the email message is a "Documents" section with a file named "adding_new_bids_step.png" (84 kB) and a description "Your bid". A "Choose File" button is visible below the description. At the bottom of the page, there is a "Publish" dropdown menu with the "Save + Keep Unpublished" option selected. The dropdown menu is open, showing four options: "Save + Keep Unpublished + Exit", "Save + Keep Unpublished + View", "Save + Keep Unpublished + Add New", and "Save + Keep Unpublished + Next".

“Save + Keep Unpublished + Exit” : Saves the bid and allows it to stay visible only by administrators with login access and returns you to the Administrators Homepage. It does not post your bid to the “Current Solicitations” page.

“Save + Keep Unpublished + View” : Saves the bid and allows you to review the document in administrators’ screens only. It does not post your bid to the “Current Solicitations” page.

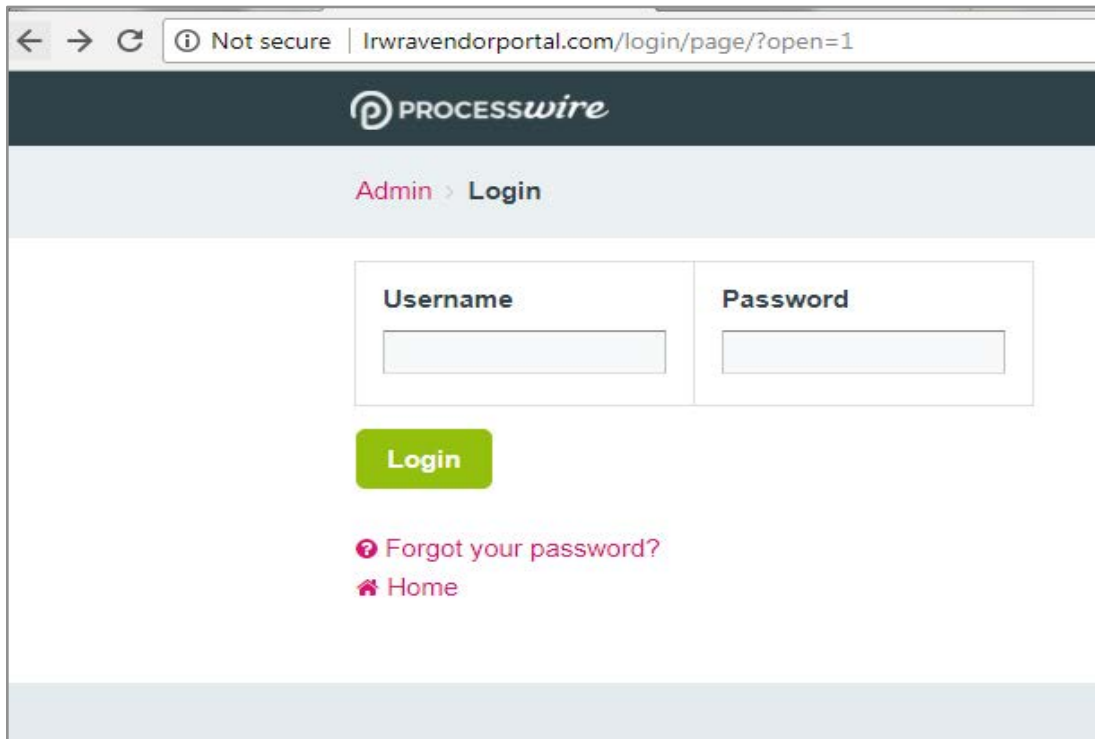
“Save + Keep Unpublished + Add New” : Saves the bid and returns you to the “Add New” screen in the administrator’s pages and allows you to enter in another bid. It does not post your bid to the “Current Solicitations” page.

“Save + Keep Unpublished + Next” : Saves the bid and takes you to the page to edit/review the last bid created (published or unpublished). It does not post your bid to the “Current Solicitations” page.

ACTION: SENDING BIDS TO REGISTERED VENDORS

STEP 1: SENDING BIDS TO REGISTERED VENDORS

Login from the administrators' page. You must be logged in as an administrator to send bids.

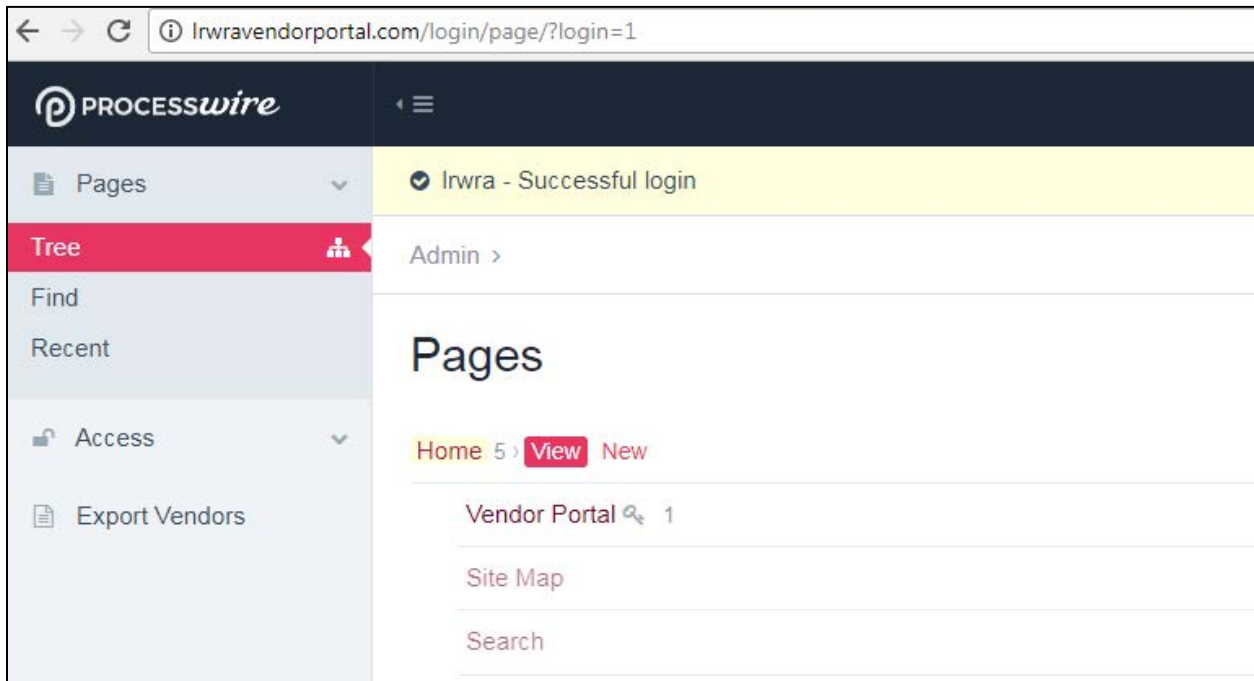


The screenshot shows a web browser window with the following elements:

- Address bar: `lrwrvendorportal.com/login/page/?open=1`
- Header: **PROCESSwire**
- Breadcrumbs: [Admin](#) > [Login](#)
- Form fields:
 - Username**:
 - Password**:
- Buttons:
 - Login** (green button)
 - [Forgot your password?](#) (with question mark icon)
 - [Home](#) (with house icon)

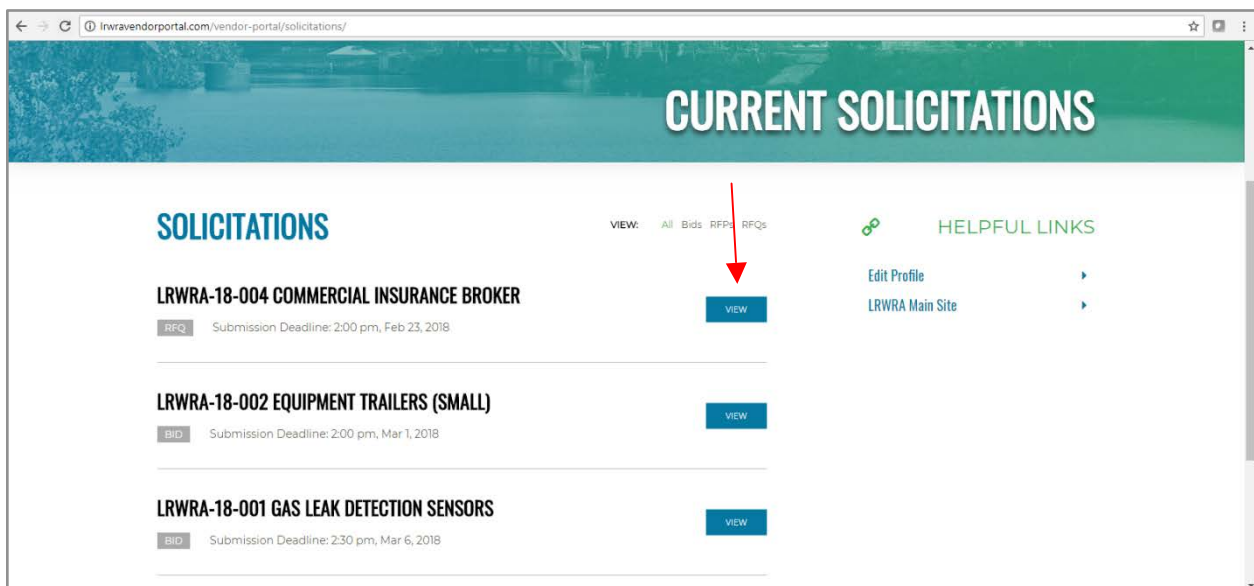
STEP 2: SENDING BIDS TO REGISTERED VENDORS

Next, access the “Current Solicitations” page via the “View” tab.



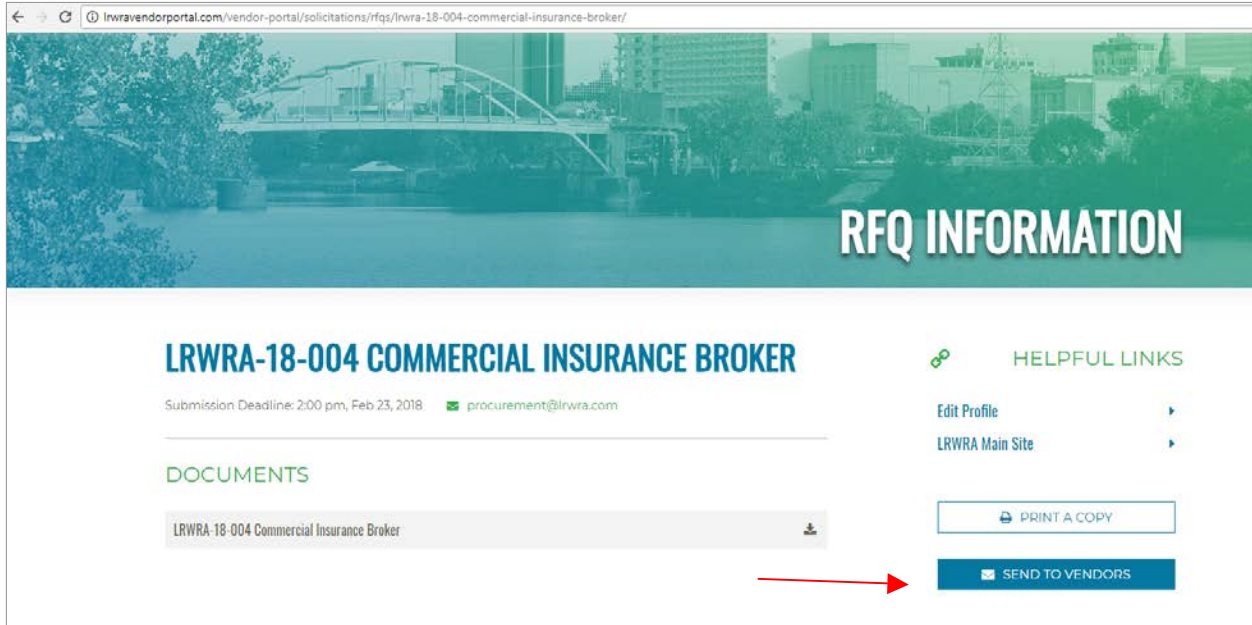
STEP 3: SENDING BIDS TO REGISTERED VENDORS

This will redirect you to the “Current Solicitations” page. Click on the “View” button to the right of the bid you want to send to all vendors who are registered under the categories assigned to this bid.



STEP 3: SENDING BIDS TO REGISTERED VENDORS

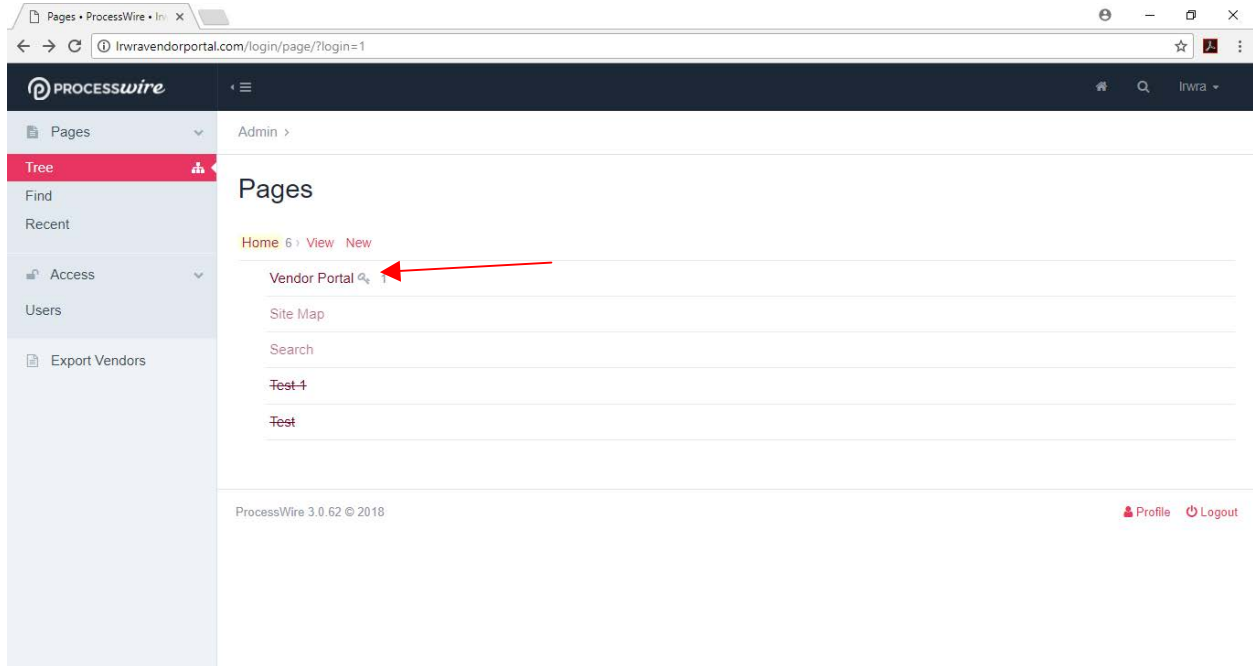
Clicking “View” will bring up a screen with all documents attached to the accessed bid. In the side bar to the right, click on “Send To Vendors.” This action will send the bid to vendors who are registered in one or more of the categories assigned to the accessed bid.



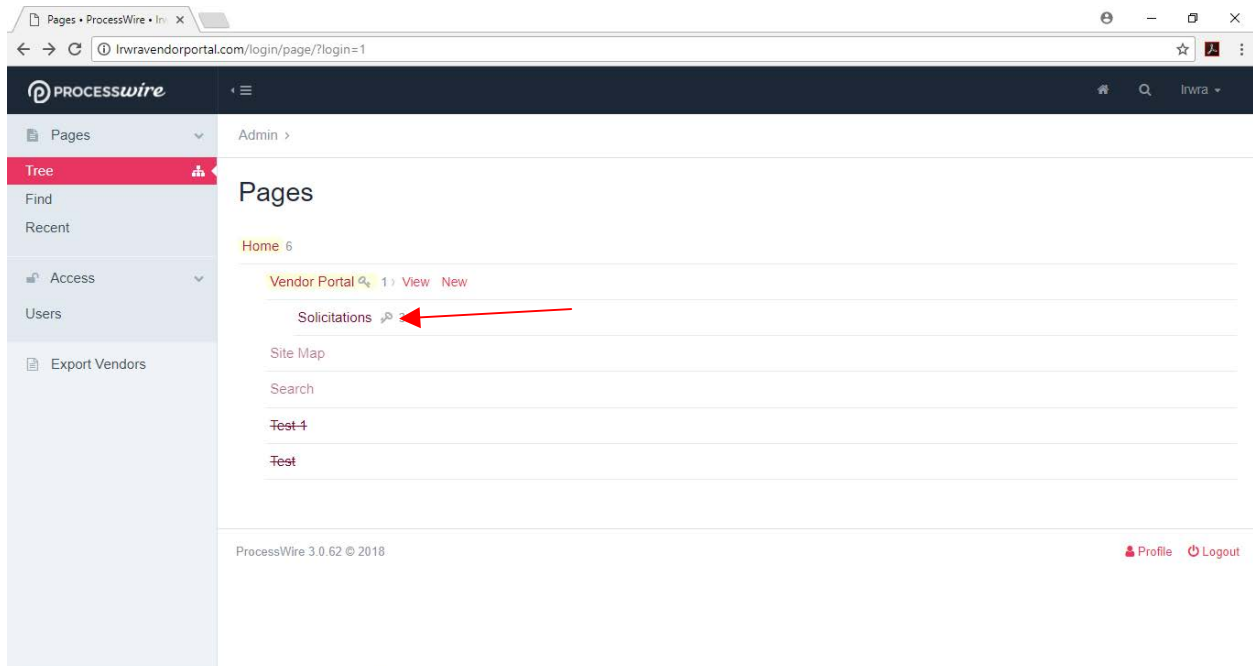
ACTION: EDITING PUBLISHED BIDS

STEP 1: EDITING PUBLISHED BIDS

To edit published bids navigate to the Administrators' Homepage and click "Vendor Portal."

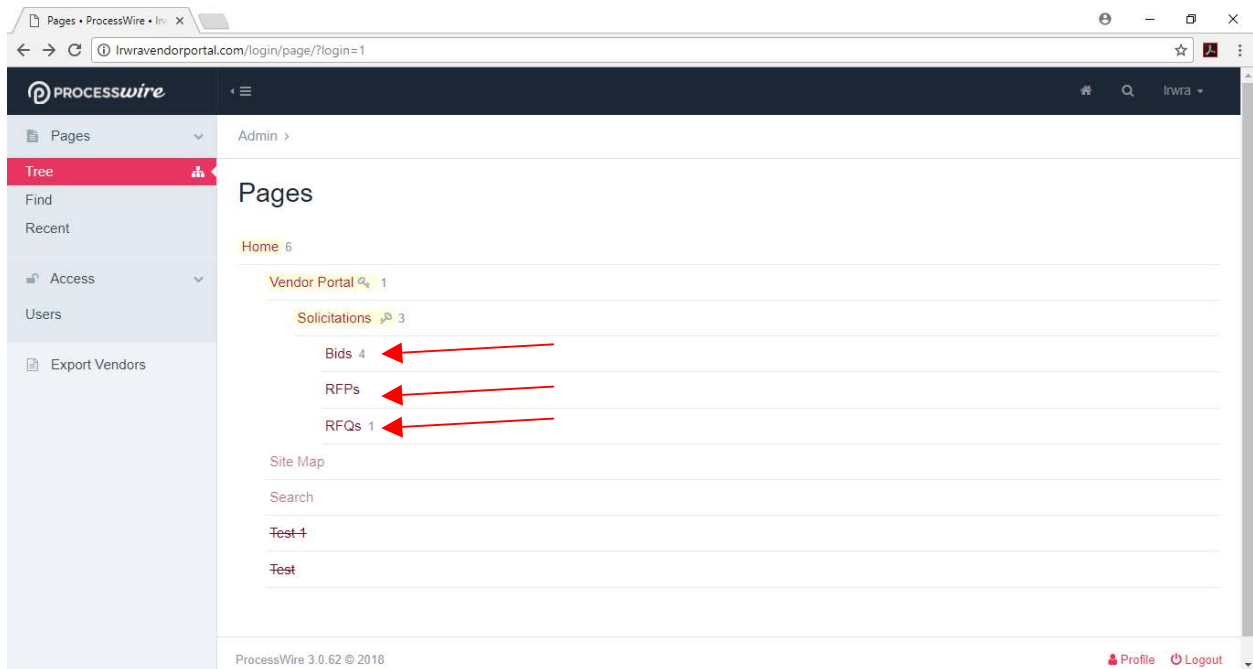


This will reveal the button "Solicitations."



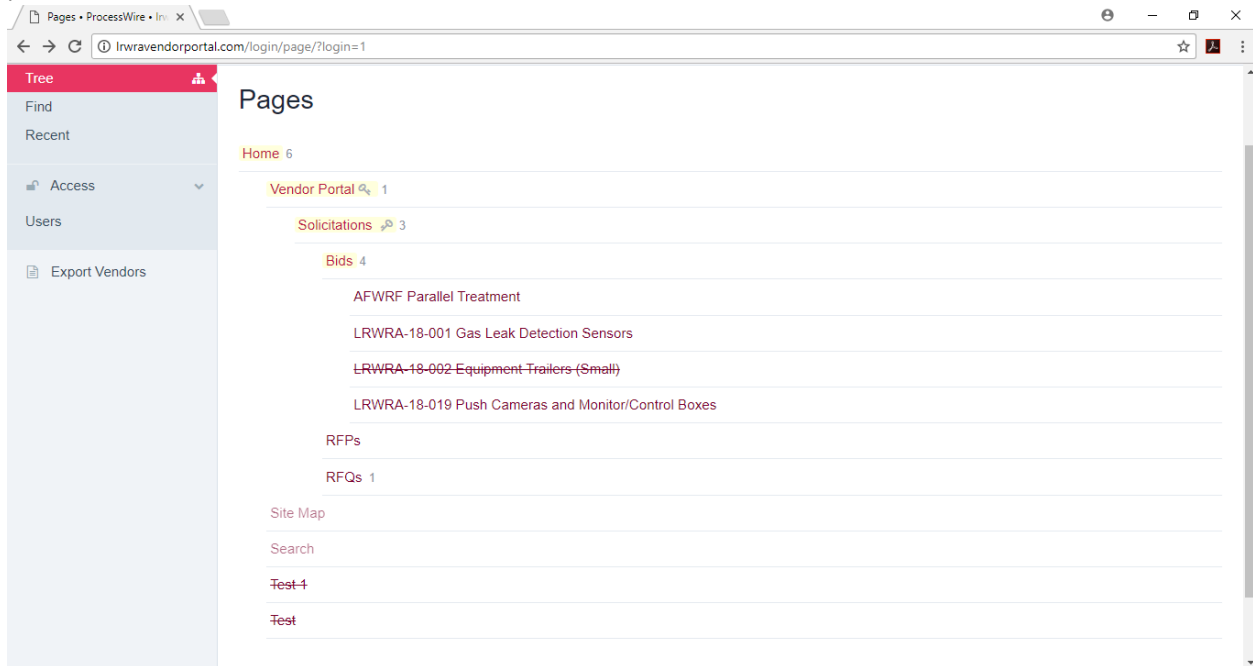
STEP TWO: EDITING PUBLISHED BID

Click “Solicitations.” This will reveal the options “Bids,” “RFPs” and “RFQs.” If any bids have been posted under one of these categories, a number next to the category will detail how many have been published (whether or not they are still active). In the example below there are 4 Bids, no RFPs and 1 RFQ.

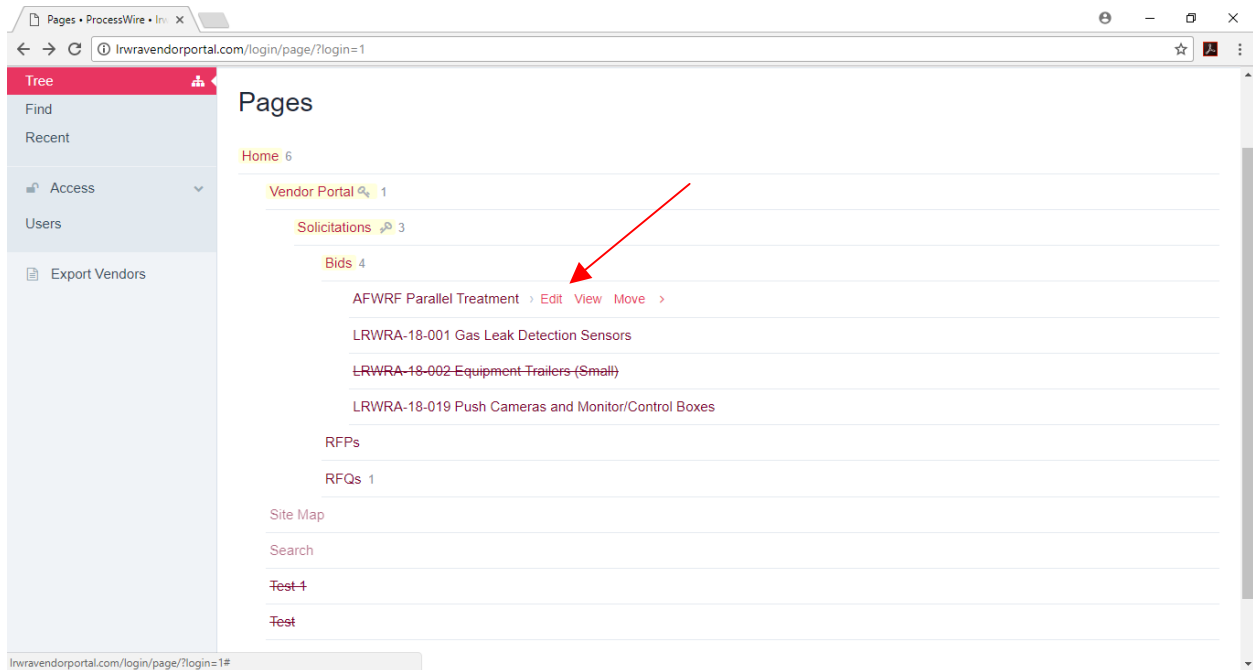


To edit a published post under the categories “Bid,” “RFPs” or RFQs” click the button under which the bid you would like to edit is housed.

This will reveal a list of all bids under that category. Bids with lines through them are no longer published and viewable to vendors.



To edit a bid hover over the name of the bid. A menu will appear to the side, giving you the options "Edit," "View" or "Move." Click "Edit."



Once you click “Edit” you will be sent to the same screen as when you initially added the bid, except this page will have all of the information which was published with the bid.

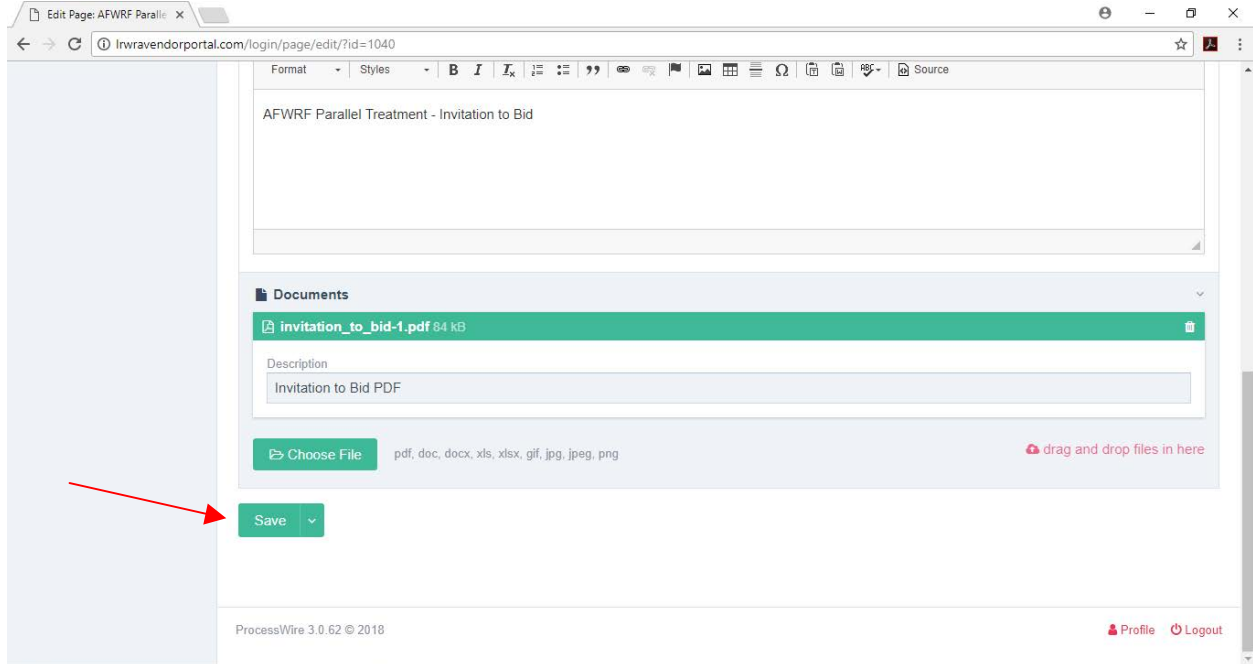
The screenshot shows the PROCESSwire 'Edit Page' interface for a bid titled 'AFWRF Parallel Treatment'. The breadcrumb trail is 'Home > Vendor Portal > Solicitations > Bids >'. The page title is 'AFWRF Parallel Treatment' with a 'Save' button. The form includes tabs for 'Content', 'Settings', 'Delete', and 'View'. The 'Content' tab is active, showing a grid of fields: 'Solicitation Name *' (AFWRF Parallel Treatment), 'Publish From Date *' (February 12, 2018), 'Publish Until Date *' (April 3, 2018), 'Opening Date *' (March 13, 2018 2:00 pm), 'Bid Type *' (Bid), and 'Contact *' (cary.lipscomb@lrwa.com). Below these are 'Categories' (Construction Services: Other Construction Services Not Listed) and 'Subject Line *' (AFWRF Parallel Treatment - Invitation to Bid).

To change any of the information, follow the same steps as listed in the “Adding Bids” section of this instructional booklet.

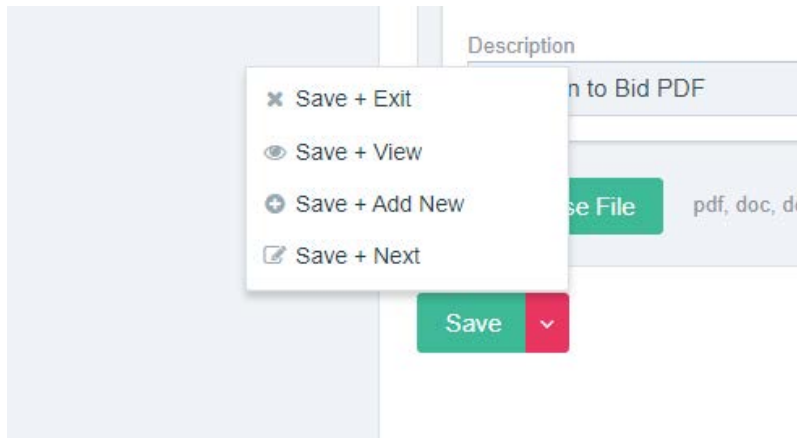
If you plan to resend this bid to registered vendors, it is highly suggested you add the phrase “Edited mm/dd/yy” to the beginning of the “Email Message.”

This screenshot shows a closer view of the 'Email Message' field in the 'Edit Page' interface. A red arrow points to the 'Email Message' label. The field contains the text 'AFWRF Parallel Treatment - Invitation to Bid'. Below the text area is a 'Documents' section with a file named 'invitation_to_bid-1.pdf' (84 KB) and a description 'Invitation to Bid PDF'. At the bottom, there is a 'Choose File' button and a 'drag and drop files in here' instruction.

Once all of your changes have been made, click “Save.”



The dropdown menu to the right of save will also give you the following options.



“Save + Exit”: Saves the bid and returns you to the Administrators Homepage.

“Save + View”: Saves the bid and allows you to review the post.

“Save + Add New”: Saves the bid and returns you to the “Add New” screen in the administrator’s pages and allows you to enter in another bid.

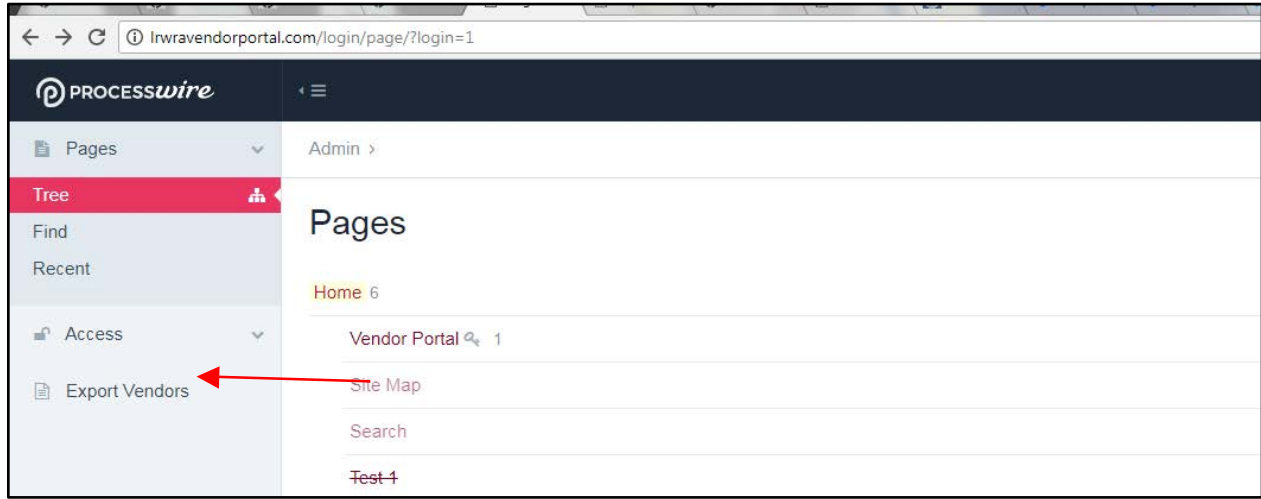
“Save + Next”: Saves the bid and takes you to the page to edit/review the last bid created (published or unpublished).

Saving your bid will not automatically email registered vendors with your edits. To do this you must follow the steps for Sending Bids to Registered Vendors listed previously in this instructional booklet.

ACTION: VIEWING AND EXPORTING VENDOR REGISTRATIONS

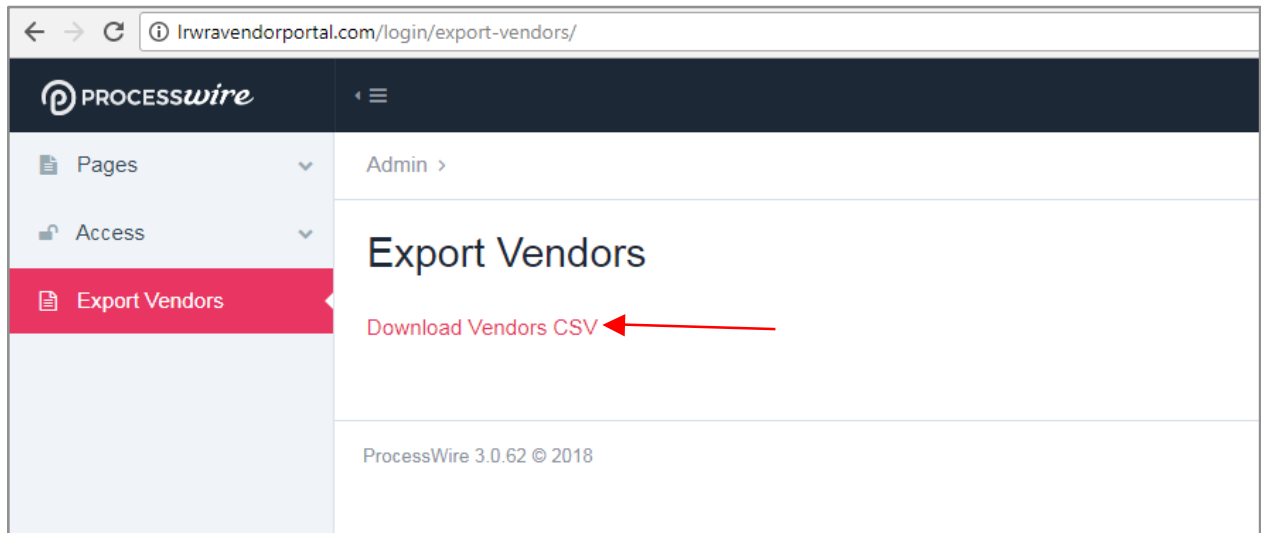
STEP 1: VIEWING AND EXPORTING VENDOR REGISTRATIONS

From the Administrator's Homepage, click on the "Export Vendors" tab located in the side bar.



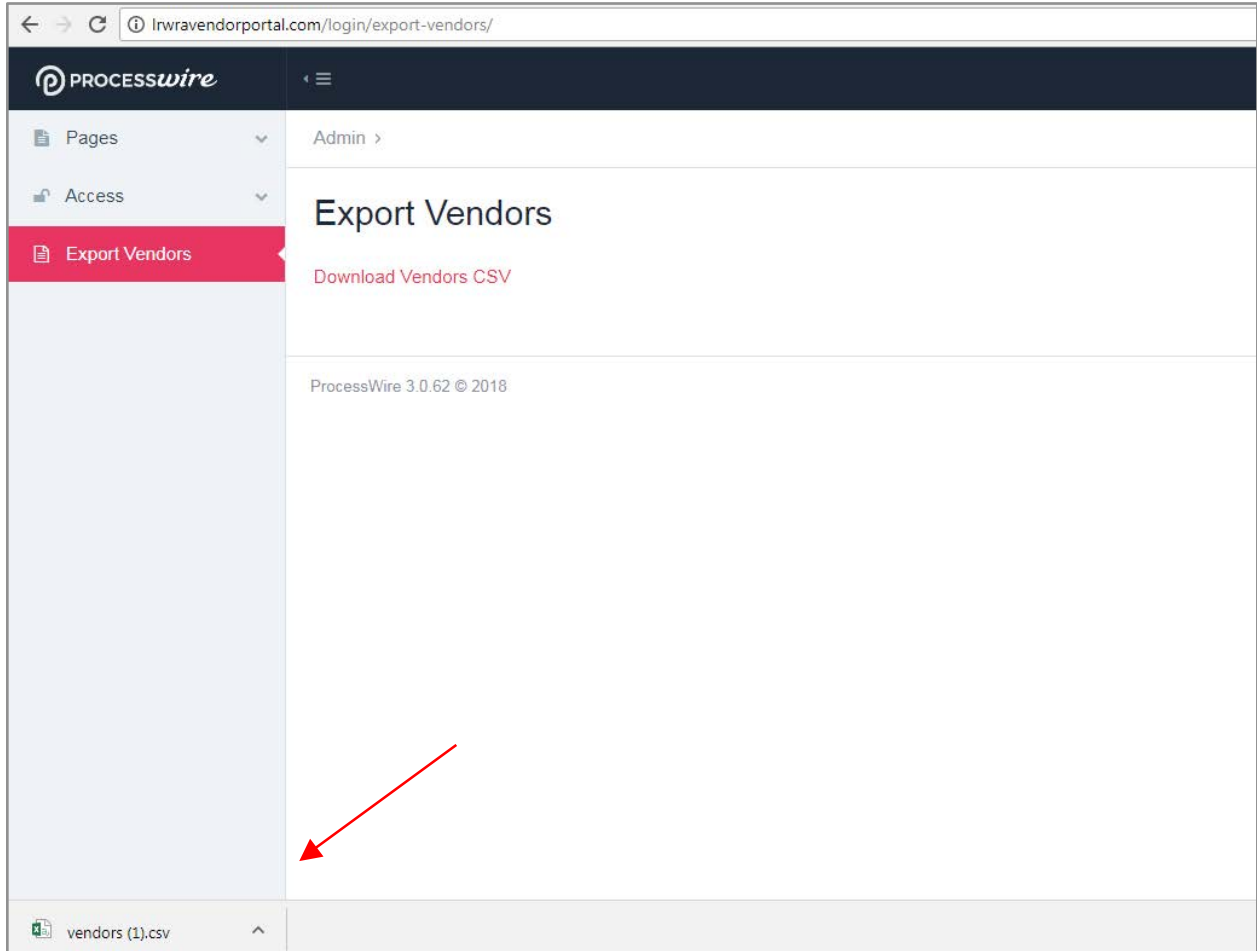
STEP 2: VIEWING AND EXPORTING VENDOR REGISTRATIONS

This will take you to the following page, where you will click on the link "Download Vendors CSV."



STEP 3: VIEWING AND EXPORTING VENDOR REGISTRATIONS

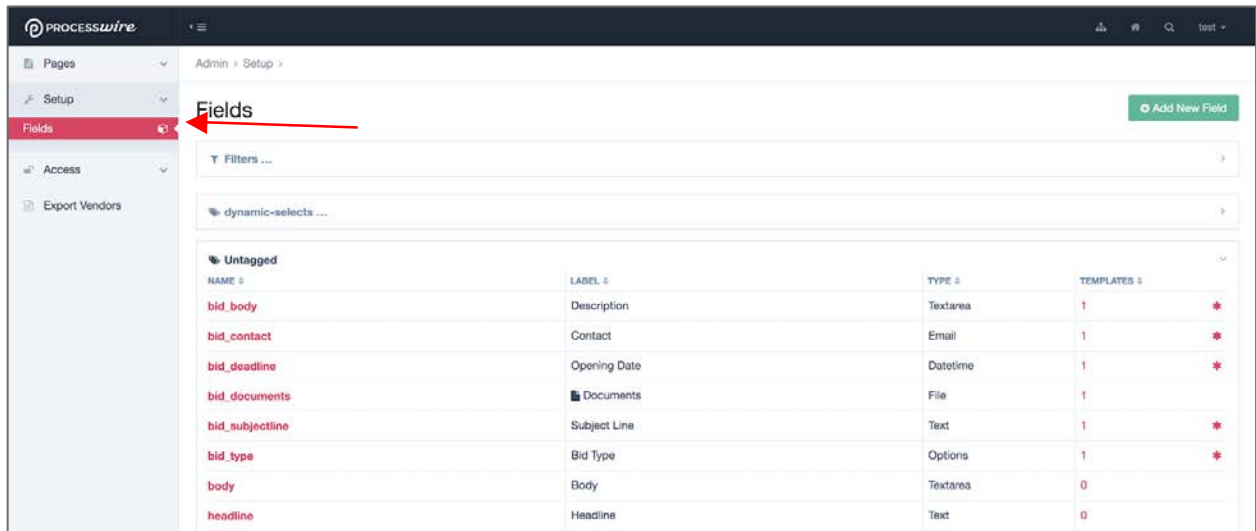
Clicking the above link will download an Excel file containing vendor registration. Open this file to access vendor data.



ACTION: ADDING VENDOR CATEGORIES

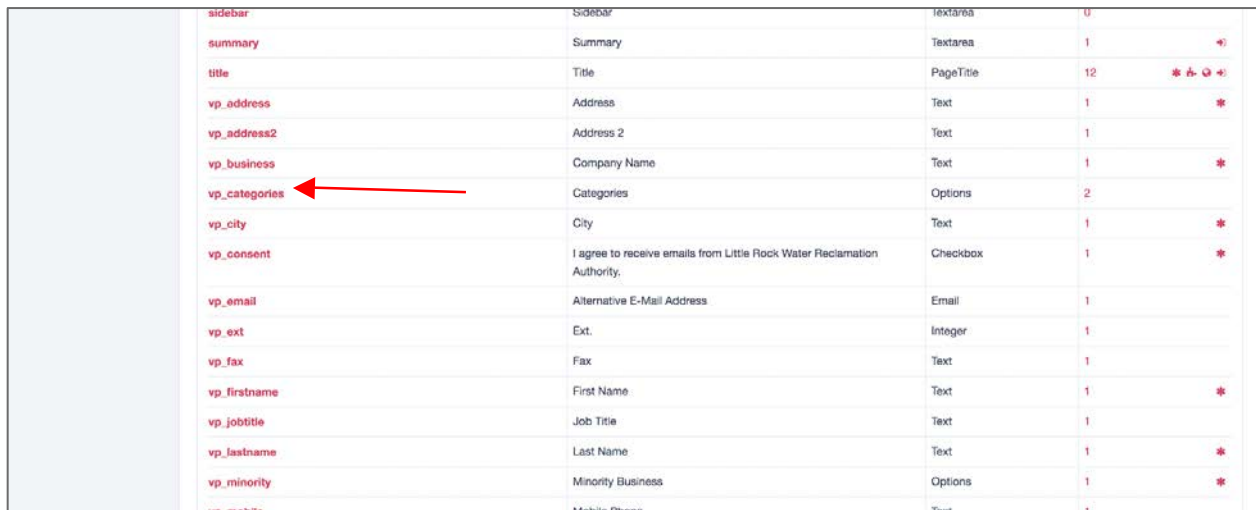
STEP 1: ADDING VENDOR CATEGORIES

Click on 'Fields' under the 'Setup' menu (on the left).



STEP 2: ADDING VENDOR CATEGORIES

Scroll down near the bottom of the list. Only click on the button titled 'vp_categories.' This option is closer to the bottom of the list. **Do not click any other fields, as they impact the backend construction of the site.**



STEP 3: ADDING VENDOR CATEGORIES

After clicking 'vp_categories' you will be redirected to the below page. Click on the tab labeled 'Details.'

The screenshot shows the 'Edit Field: vp_categories' page in the PROCESSwire interface. The 'Details' tab is selected, indicated by a red arrow. The form fields are as follows:

- Name ***: vp_categories (with a red arrow pointing to the text)
- Type ***: Select Options
- Label**: Categories
- Description ...**: (empty)
- Notes ...**: (empty)

Buttons for 'Save' and 'Override by template' are visible.

STEP 4: ADDING VENDOR CATEGORIES

Add the category using the same format as the existing categories. Do not add or change the numbers.

The website/program should add the numbers automatically upon saving. Only add the new category where it should fall alphabetically, and click save. The numbers may get out of order, but only the computer will use these for outputting the categories by selection.

The screenshot shows the 'Edit Field: vp_categories' page in the PROCESSwire interface, with the 'Input' tab selected, indicated by a red arrow. The form fields are as follows:

- What should be used for input?**: AsmSelect (Multiple values)
- What are the selectable options?**: A list of 10 categories, each starting with a number and a description.

Buttons for 'Save' and 'Override by template' are visible.

ACTION: EDITING VENDOR PROFILES

STEP 1: EDITING VENDOR PROFILES

Click 'Users' under 'Access' on the left menu. Select the user you wish to edit. This will take you to the vendor's profile.

The screenshot shows the 'Users' management interface. The left sidebar contains a menu with 'Users' highlighted in red and a red arrow pointing to it. The main content area shows a table of users with the following data:

USERNAME	E-MAIL ADDRESS	ROLES
badams-thompsonpegroup.com	badams@thompsonpegroup.com	vendor, guest
best-bestprinting.com	best@bestprinting.com	vendor, guest
bidsandproposals-nomadgcs.com	bidsandproposals@nomadgcs.com	vendor, guest
bpropertymlc-gmail.com	bpropertymlc@gmail.com	vendor, guest
brent.jacksonar-yahoo.com	brent.jacksonar@yahoo.com	vendor, guest
cgreene-bommaritoconstruction.com	cgreene@bommaritoconstruction.com	vendor, guest
charlep-pulsair.com	charlep@pulsair.com	vendor, guest
csalese-mail.thebluebook.com	csalese@mail.thebluebook.com	vendor, guest
cwitcher-chstout.com	cwitcher@chstout.com	vendor, guest
davidellet-brhgarver.com	davidellet@brhgarver.com	vendor, guest
dbci-sstelco.com	dbci@stelco.com	vendor, guest
dboggs-arkonecall.com	dboggs@arkonecall.com	vendor, guest
derrickdean-dddleasing.com	derrickdean@dddleasing.com	vendor, guest
droche@orcolan.com	droche@orcolan.com	vendor, guest

STEP 2: EDITING VENDOR PROFILES

Change the desired profile information.

Admin > Access > Users >

badams-thompsonpipegroup.com Save

Content Delete

> Username *
Any combination of letters (a-z), numbers (0-9), dashes or underscores (no spaces).
badams-thompsonpipegroup.com

First Name * Last Name *

E-Mail Address Alternative E-Mail Address

Company Name * Job Title

Address * Address 2

City * State * Zip Code *

Phone Ext. Mobile Phone Fax

STEP 3: EDITING VENDOR PROFILES

Click save.

Admin > Access > Users >

badams-thompsonpipegroup.com Save

Content Delete

> Username *
Any combination of letters (a-z), numbers (0-9), dashes or underscores (no spaces).
badams-thompsonpipegroup.com

First Name * Last Name *

E-Mail Address Alternative E-Mail Address

Company Name * Job Title

Address * Address 2

City * State * Zip Code *

Phone Ext. Mobile Phone Fax