

infotech



Bid Express[®]

Owner–agency

Roles and Access Guide

December 2021

2970 SW 50th Terrace, Gainesville, FL 32608

www.infotechinc.com



Address: 2970 SW 50th Terrace, Gainesville, Florida 32608-5076
Web: www.infotechinc.com

Customer support is available by phone or email Monday through Friday from 7:00 A.M. - 8:00 P.M. Eastern Time, excluding legal holidays and when posted.

Contact

By mail:
Infotech
2970 SW 50 Terrace
Gainesville, FL 32608-5076

Bid Express® Toll free phone:
(888) 352-2439, option #1
Email: support@bidexpress.com

Appia® Toll free phone:
(888) 352-2439, option #2
Email: appia-support@infotechfl.com

Doc Express® Toll free phone:
(888) 352-2439, option #4
Email: support@docexpress.com

Signet™ Toll free phone:
(888) 352-2439, option #5
Email: signet-support@infotechinc.com

By Fax:
(888) 971-4191

Knowledge center:
<https://infotechinc.zendesk.com>

Suggestions/ideas/general input:
feedback@bidexpress.com

Appia, the Appia logo, Bidx.com, Bid Express, the Bid Express logo, Doc Express, the Doc Express logo, the Infotech logo, Infotech Consulting and Infotech are registered service marks of Info Tech, Inc. Signet and the Infotech Consulting logo are trademarks of Info Tech, Inc.

Copyright © 2021, Info Tech, Inc., DBA Infotech. All rights reserved. This document or parts thereof may not be reproduced in any form without written permission of Info Tech, Inc., DBA Infotech. Produced in the United States of America.

Contents

Bid Express Role and Access Introduction	1
Bid Express Role Descriptions.....	2
Bid Express Roles and Access	5

Bid Express® Role and Access Introduction

The *Bid Express Roles and Access Guide* provides a high-level overview of the abilities of each role in the Bid Express® service. If you have any questions or need additional help, please contact Bid Express customer support.

The Role Description section identifies the access and abilities of each specific role. The Roles and Access section breaks down which roles can perform specific actions within the Bid Express service.

New users are assigned manager access.

Bid Express Role Descriptions

Name	Description
Manager	Can assign roles, edit business information, create, edit, and delete draft solicitations, advertise a solicitation or request for proposal, receive Q & A notifications and answer Q & A questions, issue addenda, open bids or responses, view bid details, enter manual bids, post apparent bids, has access to all reporting (bid tabulation and other), and can archive solicitations. This role must have a Digital ID if the owner–agency requires Digital IDs. This role can access API functions.
Contract Administrator	Can create, edit, and delete draft solicitations, advertise a solicitation or request for proposal, receive Q & A notifications and answer Q & A questions, issue addenda, open bids or responses, view bid details, enter manual bids, post apparent bids, has access to all reporting (bid tabulation and other), and can archive solicitations. This role must have a Digital ID if the owner–agency requires Digital IDs. This role can access API functions.
Solicitation Manager	Can create, edit, and delete draft solicitations, advertise a solicitation or request for proposal, receive Q & A notifications and answer Q & A questions, issue addenda, view bid details, post apparent bids, has access to all reporting (bid tabulation and other), and can archive solicitations. This role must have a Digital ID if the owner–agency requires Digital IDs.

Name	Description
Contract Editor	Can create a solicitation or request for proposal, edit an existing solicitation, and receive Q & A notifications. This role does not need a Digital ID.
Executive Manager	Can navigate the service with read-only access but can't modify or manage anything. Can download and view reports. This role does not need a Digital ID.
Evaluator Must be issued an invitation to access request for proposals prior to the RFP being advertised.	Has read-only access to the RFP before the deadline and can receive Q & A notifications for that RFP. After the RFP deadline, can score responses, and can fetch responses if they have an approved Digital ID prior to the RFP being advertised (for agencies that require a Digital ID).
Q & A Reviewer	Can navigate the service with read-only access but can't modify or manage solicitations. Can download and view reports. Can receive Q & A notifications and compose and save Q & A answers, but not publish the answers. This role does not need a Digital ID.

Bid Express Roles and Access

Actions performed by user role	Manager	Contract Administrator	Solicitation Manager	Contract Editor	Executive Manager (Read Only)	Evaluator	Q&A Reviewer
Assign roles and edit business information	X						
Before Advertising							
Create and edit draft solicitations	X	X	X	X			
Delete draft solicitations	X	X	X				
Must have a Digital ID if owner-agency requires Digital IDs	X	X	X			X	
Advertise solicitation or RFP	X	X	X				
Q & A							
Review Q & A notifications	X	X	X	X		X	X
Draft Q & A answers	X	X	X				X
Publish Q & A answers	X	X	X				
Bid Edits							
Issue addenda	X	X	X				
Open bids or responses	X	X					
View bid details	X	X	X				
After the deadline							
Enter manual bids	X	X					
Post apparent bids	X	X	X				
Has access to all reporting	X	X	X		X		X
Can archive solicitations	X	X	X				
Can access API functions	X	X					