



pennsylvania

DEPARTMENT OF GENERAL SERVICES

**SAP**

**S**upplier  
**R**elationship  
**M**anagement

**SRM 7.0:**

# **Creating & Maintaining Solicitations (RFx) & Contracts**

Course Number:  
V001



**pennsylvania**

DEPARTMENT OF GENERAL SERVICES

**Welcome!**



pennsylvania

DEPARTMENT OF GENERAL SERVICES

# Introductions



**pennsylvania**

DEPARTMENT OF GENERAL SERVICES

# **Course Objectives**

# Course Objectives

- After successfully completing this course you will be able to:
  - Redistribute work to other sourcing professionals
  - Source a requirement
  - Create and edit solicitation documents
  - Create and edit legal documents in Doc Builder
  - Publish solicitations in the Supplier Portal
  - Open, evaluate, and award responses to solicitations
  - Create and edit contracts

# Agenda

- Workload Redistribution
- Sourcing Requisitions
- Create and Editing a Draft RFx
- Responses and Awards
- Create the Contract



**pennsylvania**

DEPARTMENT OF GENERAL SERVICES

# **Workload Redistribution**

# Assigning Work

- Select **Workload Redistribution**



# Assigning Work

If you are authorized to assign work to others:

- Use Workload Redistribution to assign requirements to specific groups or sourcing professionals
  - Sends the Requirements to Carry Out Sourcing
- This transaction is also used to reassign responsibility for:
  - RFX (Solicitations), Contracts, and POs
  - Sole Source Material carts to DGS Bureau of Procurement

# Assigning Work

- In SRM, a shopping cart might contain more than one type of commodity
  - The line items are listed separately in the Workload Redistribution sourcing area
- Assign individual line items to a Purchaser
  - The Purchaser will later select the individual line items to process

# Finding Potential Assignments

## Search for Documents

### Document Types

Requirements:

Purchase Orders:

RFxs:

Contracts:

Status:

In Process

Purchasing Organization:

COPA Purchasing Organization

Purchasing Group:

DGS Central Purchase Purchasing Group

Document Number:

Delivery Date / Validity Period /  
Submission Deadline:

To

Search

Undo Entries

- Use the checkboxes to identify what type(s) of document to view
  - Requirements, Purchase Orders, RFx (Solicitations), and Contracts are available options

# Finding Potential Assignments

**Search for Documents**

**Document Types**

Requirements:

Purchase Orders:

RFxs:

Contracts:

Status: In Process

Purchasing Organization: COPA Purchasing Organization

Purchasing Group: DGS Central Purchase Purchasing Group

Document Number:

Delivery Date / Validity Period / Submission Deadline:  To

Search Undo Entries

- Use other criteria from dropdown menus to further refine the type of documents to be viewed
  - The Purchasing Group defaults to the buyer’s group, so it must be verified or changed
  - Select “In Process” from the Status dropdown menu
  - After selecting the desired search criteria, select the SEARCH button

# Making the Assignment

Search Result : 11 Documents

Select All | Assign To: COPA Purchasing Organization | PYB1-1504-GS Mtls Div | Go | Assign Automatically Refresh Messages Filter Settings

Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Group
<a href="#">0011723996 / 1</a>	CARTON,RCRD,OPF,WLDECT,32/200# 15x12x10	Requirement	In Process	COPA Purchasing Organization	DGS Central Purchase Purchasing Group
<a href="#">0011781299 / 1</a>	TOWEL, ROLL, 1000, 1PLY,1.5 CORE	Requirement	In Process	COPA Purchasing Organization	DGS Central Purchase Purchasing Group

- The Results List screen displays
- View a document by selecting its Document Number

# Making the Assignment

Search Result : 11 Documents

Select All Assign To: COPA Purchasing Organization PYB1-1504-GS Mtls Div Go Assign Automatically Refresh Messages Filter Settings

Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Group
<a href="#">0011723996 / 1</a>	CARTON,RCRD,OPF,WLDECT,32/200# 15x12x10	Requirement	In Process	COPA Purchasing Organization	DGS Central Purchase Purchasing Group
<a href="#">0011781299 / 1</a>	TOWEL, ROLL, 1000, 1PLY,1.5 CORE	Requirement	In Process	COPA Purchasing Organization	DGS Central Purchase Purchasing Group

- Select a document by selecting the *gray* block to the left; or
- Select all documents by choosing the SELECT ALL button

# Making the Assignment

Search Result : 11 Documents

Select All | Assign To: COPA Purchasing Organization | PYB1-1504-GS Mtls Div | Go | ~~Assign Automatically~~ Refresh Messages Filter Settings

Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Group
<a href="#">0011723996 / 1</a>	CARTON,RCRD,OPF,WLDECT,32/200# 15x12x10	Requirement	In Process	COPA Purchasing Organization	DGS Central Purchase Purchasing Group
<a href="#">0011781299 / 1</a>	TOWEL, ROLL, 1000, 1PLY,1.5 CORE	Requirement	In Process	COPA Purchasing Organization	DGS Central Purchase Purchasing Group

- Use the match code to select the Purchasing Organization and Purchasing Group in which the work is to be assigned
- Select the GO button
- Do not use the ASSIGN AUTOMATICALLY button

# Making the Assignment

Processing of the documents has been completed

---

**Search for Documents**

**Document Types**

Requirements:       Status:

Purchase Orders:       Purchasing Organization:

RFxs:       Purchasing Group:

Contracts:       Document Number:

Delivery Date / Validity Period / Submission Deadline:  To

---

**Search Result : 11 Documents**

Select All | Assign To:   Go | Assign Automatically Refresh Messages Filter Settings

Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Group
<a href="#">0011723996 / 1</a>	CARTON,RCRD,OPF,WLDECT,32/200# 15x12x10	Requirement	In Process	COPA Purchasing Organization	DGS Central Purchase Purchasing Group
<a href="#">0011781299 / 1</a>	TOWEL, ROLL, 1000, 1PLY,1.5 CORE	Requirement	In Process	COPA Purchasing Organization	DGS Central Purchase Purchasing Group

- A message will display stating, “Processing of the documents has been completed”

# Understanding RFx Documents

# Understanding RFx Documents

A solicitation document:

- May be created directly from the Carry Out Sourcing assignment screen
  - Use this option whenever possible
- May be created as a copy of an existing solicitation
- May be created as a new document

# Understanding RFx Documents

## Five Types of Solicitation Documents

- Each type should be used, and referred to, in the correct way for legal and business purposes

*Note: A responder to a solicitation must be deemed responsive and responsible in order to receive an award.*

# Understanding RFX Documents

## Invitation for Bid (IFB)

No contract currently exists; a competitive solicitation process is required	Supplier submits a bid for a specific item with specific criteria	COPA awards based on low price
--	---	--------------------------------

### Scenario:

- LCB requisitions plastic (“poly”) bags for its retail stores
  - The bags are a new item and no contract for them exists
  - The agency developed its own specifications for the bags regarding size, strength, artwork, and other criteria
  - The agency provided specific expectations on quantity, deliveries, and permits

# Understanding RFx Documents

## Request for Proposal (RFP)

<p>No contract currently exists; a competitive solicitation process is required</p>	<p>Supplier submits a technical proposal, as well as cost information for a specific item with criteria offered by supplier</p>	<p>COPA awards based on a variety of criteria and is considered “best value”</p> <p>Best &amp; Final Offers may be sought</p>
---	---	---

### Scenario:

- Dept. Human Services (DHS) needs a contract in place for pharmaceuticals
  - Prescription-filling services
  - Generic and name brand options
  - Contract to serve all DHS institutions
- The potential supplier(s) have some flexibility, and can create a customized plan for the Commonwealth to offer the best service, logistics, and price

# Understanding RFx Documents

## Request for Quote Invitation to Qualify (RFQ ITQ)

A multiple-award contract currently exists; pricing may or may not be associated with the desired item	Supplier on contract submits a price quote and other information for a requisitioned item (not IT-related)	COPA awards based on a variety of criteria and is considered “best value”
--	--	---

### Scenario:

- Tree trimming service is required on state game lands in West Moreland County
  - A contract exists with the tree trimmers
  - A quote is needed for the specific amount of service required at that one location

# Understanding RFx Documents

## Request for Quote IT Invitation to Qualify (RFQ IT-ITQ)

A contract currently exists but no pricing is associated with the desired item	Supplier submits a technical proposal, as well as a price quote, for a requisitioned IT item	COPA awards based on best value
--	--	---------------------------------

### Scenario:

- The Master IT Services ITQ streamlines the process of individual agencies initiating procurement of their IT service needs
  - The ITQ process pre-qualifies a supplier
  - One or more suppliers – based on the amount of the procurement – will then be invited to submit a quote to provide services to any of the Commonwealth agencies
- All IT procurements must comply with ITB PRO001 (Information Technology Bulletin)

# Understanding RFx Documents

- Refer to the Department of General Services Enterprise Invitation to Qualify (ITQ) portal for complete details

# Understanding RFx Documents

## Sole Source Materials\*

- The agency requisitions the **material** by:
  1. Creating and ordering the Shopping Cart using the “Describe Requirement” method
  2. Completing the online Source Justification Form
  3. Forwarding the fully approved Shopping Cart to DGS

\*refer to Sole Source Material Flowchart Appendix A

# Understanding RFx Documents

- After receiving the agency request:
  1. DGS will process the Supplier Price Request (SPR) and create the Purchase Order for the Sole Source Board release and approval process
  2. Upon final release by the Board, DGS will update the Source Justification Form with pertinent award information
  3. Upon final approval, DGS will send the Agency an email that the Source Justification Form has been approved
  4. DGS issues the PO to the supplier

# Understanding RFx Documents

- For additional information regarding Material requests for Sole/Single Source approvals, please reference the Procurement Handbook, Part II, Chapter 5

*Note: Material requests are reviewed by the Sole Source Board and service requests follow a pre-defined workflow.*

# Understanding RFx Documents

## Sole Source Services\*

- Shopping carts are used for sole source service requests, but are not forwarded to DGS
  - Agency completes the SPR process and receives a quote from the supplier
  - Agency completes the online Source Justification Form, with attached supplier quote and all other pertinent documentation
  - Upon final approval from DGS, the agency will receive an email that the source justification has been approved
  - The agency may process the Purchase Order document type in SRM utilizing the 'Follow-On Document' functionality of the SPR once the document is awarded
- For more information regarding Service requests for Sole/Single Source approvals, please reference the Procurement Handbook, Part III Chapter 5

\*Sole Source Service Flowchart Appendix B

# Understanding RFX Documents

## Public and Restricted Solicitations

- Public
  - Any registered supplier can respond
- Restricted
  - Only those suppliers on contract can respond
  - This type is commonly used for RFQs to ensure that responses are received only from those suppliers already on contract

# Understanding RFX Documents

## Paper or Electronic Submissions?

- When creating a solicitation, the submission method – either paper or electronic – must be selected and entered into both SRM and Document Builder
- Electronic submissions should be the **primary** method of doing business
  - Whatever method is chosen must be used by **all** responders
    - Deviating from the prescribed method will result in the responder's bid being considered non-responsive



**pennsylvania**

DEPARTMENT OF GENERAL SERVICES

# **Sourcing Requisitions**

# Overview of Carry Out Sourcing

- The functionality of Carry Out Sourcing in SRM 7.0 is to:
  - Locate line item requirements for the purpose of identifying a supplier to provide the material and/or services, and
  - Issue a Purchase Order or Contract to the supplier

# Carry Out Sourcing

In SRM 7.0, the Carry Out Sourcing function consists of a four-step wizard:

## 1. Select Requisition

- Perform a search for shopping cart requisition(s) matching the identified criteria
- Select applicable requisition(s) for processing

## 2. Assign Source of Supply

- Assign the appropriate supplier to the requisition(s)
- Create a draft procurement document(s) (e.g., RFx, Contract, Purchase Order)

# Carry Out Sourcing

## 3. Review Draft

- Review and process selected procurement document draft(s)

## 4. Summary Screen

- Display the newly created procurement document(s)
- Make edits if necessary

# Carry Out Sourcing

## Accessing the Sourcing Wizard

- Select **Purchasing**

Left navigation pane under – Create Documents

- Select **Carry Out Sourcing**



# Carry Out Sourcing

## Assigning Sources of Supply

**Assign Sources of Supply: Step 1 (Select Requisition)**

◀ Previous   Next ▶   Close

1 **Select Requisition**   2 Assign Sources of Supply (No Items)   3 Review Drafts (No Items)   4 Summary Screen (No Documents)

▼ Search Criteria: Requisitions

Number of Requisition:    Name of Requisition:    [Settings](#)

Item Description:    Product Category:

Product:

Requester:

Purchasing Organization:

Purchasing Group:

Priority:

Delivery Date Range:

Delivery Date:  To:

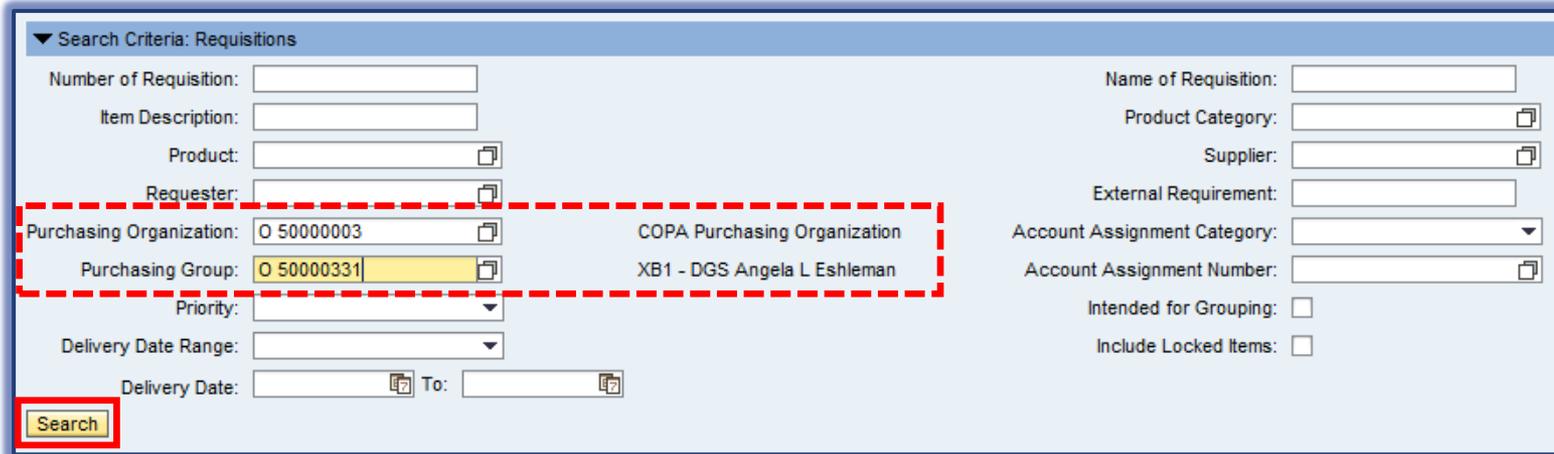
          

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract

- The wizard displays on Step 1
- The *Search Criteria: Requisitions* area provides a wide range of entry fields

# Carry Out Sourcing

## Step 1 (Select Requisition)



▼ Search Criteria: Requisitions

Number of Requisition:

Item Description:

Product:

Requester:

Purchasing Organization:  COPA Purchasing Organization

Purchasing Group:  XB1 - DGS Angela L Eshleman

Priority:

Delivery Date Range:

Delivery Date:  To:

Name of Requisition:

Product Category:

Supplier:

External Requirement:

Account Assignment Category:

Account Assignment Number:

Intended for Grouping:

Include Locked Items:

- Enter your Purchasing Organization and Purchasing Group
  - To find all assignments for your organization and group, leave other search fields blank
- Select the SEARCH button
- Items matching your selection criteria will display

# Carry Out Sourcing

## Step 1 (Select Requisition)

Delivery Date Range:

Delivery Date:  To:

Include Locked Items:

<input type="checkbox"/>	Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supp
<input checked="" type="checkbox"/>	<a href="#">10011784/1</a>	EMS ALS Medical Cases	42171912		75.000	EA	Angela Eshleman	10/02/2013		
<input type="checkbox"/>	<a href="#">10011784/2</a>	Rescue Blankets	42171701		225.000	EA	Angela Eshleman	10/02/2013		
<input type="checkbox"/>	<a href="#">10011784/3</a>	Emergency Stretcher	42171611		150.000	EA	Angela Eshleman	10/02/2013		
<input type="checkbox"/>	<a href="#">10011784/4</a>	Emergency Hospital Services	85101501		80.000	H	Angela Eshleman	10/02/2013		
<input type="checkbox"/>	<a href="#">10011785/1</a>	BEDSHEET,FITTED,PERCALE,WHT,35X80X6	42132105		1,250.000	EA	Angela Eshleman	10/02/2013		
<input type="checkbox"/>	<a href="#">10011785/2</a>	BEDSHEET,PERCALE,WHT,54X90	42132105		1,250.000	EA	Angela Eshleman	10/02/2013		
<input type="checkbox"/>	<a href="#">10011785/3</a>	BEDSPREAD,TREVIRA,POLY,CLRS,72X108	42132106		750.000	EA	Angela Eshleman	10/02/2013		

- To view the original Shopping Cart along with its details and documents, select the Requisition / Item Number link

# Carry Out Sourcing

## Step 1 (Select Requisition)

<input type="button" value="Select All"/> <input type="button" value="Expand"/> <input type="button" value="Collapse"/> <input type="button" value="Hide Subordinate Outlines"/> <span>All Categories</span> <input type="button" value="Reject Items"/>									
<input type="checkbox"/>	Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier
<input type="checkbox"/>	▪ <a href="#">10011784/1</a>	EMS ALS Medical Cases	42171912		75.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011784/2</a>	Rescue Blankets	42171701		225.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011784/3</a>	Emergency Stretcher	42171611		150.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011784/4</a>	Emergency Hospital Services	85101501		80.000	H	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011785/1</a>	BEDSHEET,FITTED,PERCALE,WHT,35X80X6	42132105		1,250.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011785/2</a>	BEDSHEET,PERCALE,WHT,54X90	42132105		1,250.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011785/3</a>	BEDSPREAD,TREVIRA POLY,CLRS,72X108	42132106		750.000	EA	Angela Eshleman	10/02/2013	

- To begin processing a requirement immediately, select the *gray* block to the left to highlight it
- Note the indicator in the upper left corner of the table, which signifies that multiple rows may be selected
  - When selected, a dropdown will display giving options to Select All or Deselect All

# Carry Out Sourcing

## Step 1 (Select Requisition)

<input type="button" value="Select All"/> <input type="button" value="Expand"/> <input type="button" value="Collapse"/> <input type="button" value="Hide Subordinate Outlines"/> <input type="text" value="All Categories"/> <input type="button" value="Reject Items"/>									
<input type="checkbox"/>	Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier
<input type="checkbox"/>	▪ <a href="#">10011784/1</a>	EMS ALS Medical Cases	42171912		75.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011784/2</a>	Rescue Blankets	42171701		225.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011784/3</a>	Emergency Stretcher	42171611		150.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011784/4</a>	Emergency Hospital Services	85101501		80.000	H	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011785/1</a>	BEDSHEET,FITTED,PERCALE,WHT,35X80X6	42132105		1,250.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011785/2</a>	BEDSHEET,PERCALE,WHT,54X90	42132105		1,250.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ <a href="#">10011785/3</a>	BEDSPREAD,TREVIRA POLY,CLRS,72X108	42132106		750.000	EA	Angela Eshleman	10/02/2013	

- To select **all** rows in the table, use the SELECT ALL button
- To select **multiple** rows, press and hold down the *Shift* key, then choose the row(s)
  - Note: The first row you select is highlighted differently
- To deselect a row, press and hold down the *Ctrl* key, then choose the row

# Carry Out Sourcing

## Step 1 (Select Requisition)

**Assign Sources of Supply: Step 1 (Select Requisition)**

◀ Previous **Next ▶** Close

1 2 3 4

Select Requisition Assign Sources of Supply (No Items) Review Drafts (No Items) Summary Screen (No Documents)

▶ Search Criteria: Requisitions

Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier
▪ <a href="#">10011784/1</a>	EMS ALS Medical Cases	42171912		75.000	EA	Angela Eshleman	10/02/2013	
▪ <a href="#">10011784/2</a>	Rescue Blankets	42171701		225.000	EA	Angela Eshleman	10/02/2013	
▪ <a href="#">10011784/3</a>	Emergency Stretcher	42171611		150.000	EA	Angela Eshleman	10/02/2013	
▪ <a href="#">10011784/4</a>	Emergency Hospital Services	85101501		80.000	H	Angela Eshleman	10/02/2013	
▪ <a href="#">10011785/1</a>	BEDSHEET FITTED PERCALE WHT 35X80X6	42132105		1 250.000	EA	Angela Eshleman	10/02/2013	

- Select the NEXT button to proceed to Step 2

# Carry Out Sourcing

## Step 2 (Assign Source of Supply)

**Assign Sources of Supply: Step 2 (Assign Sources of Supply ( 4 Items ))**

◀ Previous Next ▶ Save Close ?

1 2 3 4

Select Requisition Assign Sources of Supply ( 4 Items) Review Drafts (No Items) Summary Screen (No Documents)

Select All Expand All Collapse All Change Refresh Propose Sources of Supply Create Draft Replace Item with Catalog Item Undo Replacement Submit to Grouping Remove

Requisition / Item Number	Description	Category Description	Quantity	Unit	Delivery Date	Supplier Number	Supplier Name	Net Price/Limit	Gross Price	Currency	Net Va
10011784/1	EMS ALS Medical Cases	EMS RESCUE CASES	75.000	EA	10/02/2013			150.00	150.00	USD	11,250
10011784/2	Rescue Blankets	EMERGENCY/RESCUE BLA	225.000	EA	10/02/2013			25.00	25.00	USD	5,625
10011784/3	Emergency Stretcher	EMERGENCY RESPONSE L	150.000	EA	10/02/2013			60.00	60.00	USD	9,000
10011784/4	Emergency Hospital Services	EMERGENCY/SURGICAL H	80.000	H	10/02/2013			250.00	250.00	USD	20,000

- There are several processing options in this step
  - Select the applicable line item(s)
  - Choose the appropriate command button

# Carry Out Sourcing

## Step 2 (Assign Source of Supply)

<span>1</span> Select Requisition <span>2</span> Assign Sources of Supply ( 4 Items) <span>3</span> Review Drafts (No Items) <span>4</span> Summary Screen (No Documents)										
Select All   Expand All   Collapse All   Change   Refresh             Propose Sources of Supply   Create Draft             Replace Item with Catalog Item   Undo Replacement   Submit to Groupin										
Requisition / Item Number	Description	Category Description	Quantity	Unit	Effective Date	Supplier Number	Supplier Name	Net Price/Limit	Gross Price	Comments
10011784/1	EMS ALS Medical Cases	EMS RESCUE CASES	75		10/02/2013			150.00	150.00	U
10011784/2	Rescue Blankets	EMERGENCY/RESCUE BLA	225		10/02/2013			25.00	25.00	U
10011784/3	Emergency Stretcher	EMERGENCY RESPONSE L	150.000	EA	10/02/2013			60.00	60.00	U
10011784/4	Emergency Hospital Services	EMERGENCY/SURGICAL H	80.000	H	10/02/2013			250.00	250.00	U

- SRM 7.0 uses the term *Create Draft* when referring to the initial transfer of requisition items into a procurement document
  - All procurement document types may be generated at this step (e.g. RFx, Contract, Purchase Order)
- To create a solicitation document:
  - Select the applicable line item(s)
  - Select the CREATE DRAFT button and choose *RFx*

# Carry Out Sourcing

## Step 3 (Review Drafts)

**Assign Sources of Supply: Step 3 (Review Drafts ( 4 Items))**

◀ Previous Next ▶ | Process All Drafts Close Process Selected Drafts Edit Selected Drafts

1 2 3 4

Select Requisition Assign Sources of Supply (No Items) **Review Drafts ( 4 Items)** Summary Screen (No Documents)

▼ Created Drafts

Change Selected Draft To ▶ Remove

Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
P00068292 08/08/2013 15:05:22	Bid Invitation			

Details of Selected Drafts P00068292 08/08/2013 15:05:22

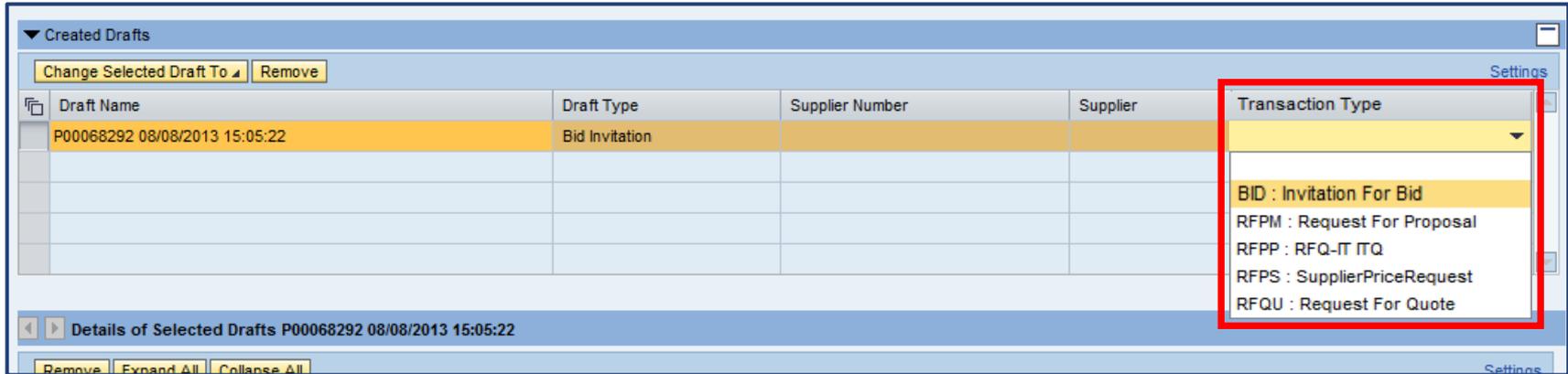
Remove Expand All Collapse All

Requisition / Item Number	Configurable Item Number	Description	Category	Quantity	Unit	Info Record	Net Price	Gross Price	Currency
▪ 10011784 / 1		EMS ALS Medical Cases	42171912	75.000	EA		150.00	150.00	USD
▪ 10011784 / 2		Rescue Blankets	42171701	225.000	EA		25.00	25.00	USD
▪ 10011784 / 3		Emergency Stretcher	42171611	150.000	EA		60.00	60.00	USD
▪ 10011784 / 4		Emergency Hospital Services	85101501	80.000	H		250.00	250.00	USD

- Review and process the selected draft solicitation document

# Carry Out Sourcing

## Step 3 (Review Drafts)



Created Drafts

Change Selected Draft To Remove

Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
P00068292 08/08/2013 15:05:22	Bid Invitation			BID : Invitation For Bid

Details of Selected Drafts P00068292 08/08/2013 15:05:22

Remove Expand All Collapse All

- Select the applicable *Transaction Type* for the document



Created Drafts

Change Selected Draft To Remove

Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
15 EMS Supplies_Services FY 14-15	Bid Invitation			BID : Invitation For Bid

- Edit the defaulted name of the solicitation

# Carry Out Sourcing

## Step 3 (Review Drafts)

Created Drafts

Change Selected Draft To  Settings

	Draft Type	Supplier Number	Supplier	Transaction Type
RFx				
Contract				
Purchase Order	Bid Invitation			BID : Invitation For Bid
Auction				

Details of Selected Drafts P00068292 08/08/2013 15:05:22

Settings

Requisition / Item Number	Configurable Item Number	Description	Category	Quantity	Unit	Info Record	Net Price	Gross Price	Currency
10011784 / 1		EMS ALS Medical Cases	42171912	75.000	EA		150.00	150.00	USD
10011784 / 2		Rescue Blankets	42171701	225.000	EA		25.00	25.00	USD
10011784 / 3		Emergency Stretcher	42171611	150.000	EA		60.00	60.00	USD
10011784 / 4		Emergency Hospital Services	85101501	80.000	H		250.00	250.00	USD

- If necessary:
  - Change the selected draft to another document type
  - Remove the draft document
  - Remove any of the previously selected line items from the draft document

# Carry Out Sourcing

## Step 3 (Review Drafts)

**Assign Sources of Supply: Step 3 (Review Drafts ( 4 Items ))**

1 Select Requisition   
 2 Assign Sources of Supply (No Items)   
 3 Review Drafts ( 4 Items)   
 4 Summary Screen (No Documents)

▼ Created Drafts

Draft Name	Draft Type	Supplier Number	Supplier	Transact
15 EMS Supplies_Services FY 14-15	Bid Invitation			RFQU : Re

- Choose the EDIT SELECTED DRAFTS button to continue
- **Important note: Do not use the PROCESS ALL DRAFTS or PROCESS SELECTED DRAFTS buttons due to potential approval workflow issues**

# Carry Out Sourcing

## Step 4 (Summary Screen)

**Summary Screen: Step 4 (Summary Screen 1 Documents)**

◀ Previous | Next ▶ | Refresh | Close

1 Select Requisition → 2 Assign Sources of Supply (No Items) → 3 Review Drafts (No Items) → 4 Summary Screen 1 Documents

**Created Objects**

Document Number	Document Type	Description	Status	Supplier Number	Supplier Name	Total Value	Currency
6100004504	Rfx	15 EMS Supplies_Services FY 14-15	Saved			0.00	

Settings

- The Summary Screen displays the newly created procurement document(s)
- Note that a secondary window opens simultaneously with the Summary Screen
  - It contains the draft version of the procurement document, available for editing



**pennsylvania**

DEPARTMENT OF GENERAL SERVICES

# **Editing a Draft RFX**

# Editing a Draft RFx

- Review your RFx
  - Verify that all of the data from the requisition line item(s) is complete and accurate
  - If applicable, make any edits to the information
- On each tab, enter any necessary data into the appropriate fields, and/or attach documents
- Access Document Builder to generate the Terms and Conditions (T&Cs)
- Publish the RFx

# Editing a Draft RFX

**Edit RFX :**

Submission deadline for bids 01/02/2014 at 00:00:00 is in the past  
 Opening date 01/02/2014 is in the past  
 Start date is in the past  
 Submission deadline must be later than the start date  
 Mandatory Attributes Not Maintained

**RFX Number** 6100027171   
 **Smart Number** CKA RFX Demo 1-2-14   
 **Type** Invitation For Bid   
 **Status** Saved   
 **Created On** 01/02/2014 11:19:38   
 **Created By** Cynthia Anderson   
 **Time Zone** EST  
**Number of Suppliers** 0   
**Smart Number** CKA RFX Demo 1-2-14   
**Version Number**   
**Version Type**   
**Active Version**   
**External Version Number**

**RFX Information** | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

**RFX Parameters** | Questions | Notes and Attachments | Conditions

**Identification**  
 Smart Number:   
 Smart Number is External  
 RFX Type:   
 Bid Description:   
 Publication Type:

**Event Parameters**  
 Detailed Price Information:   
 Follow-On Document:   
 Bidder Can Change RFX Responses:   
 Allow Multiple RFX Responses for Each Company:

**Organization**  
 Purchasing Organization:    
 Purchasing Group:   [Show Members](#)

**Dates**  
 Start Date:    
 Submission Deadline: \*    
 Opening Date:

Change does NOT require approval:

**Partners and Delivery Information**

Function	Number	Name	Phone Number
Requester	703389	<a href="#">Cynthia Anderson</a>	
Goods Recipient	703389	<a href="#">Cynthia Anderson</a>	
Responsible Employee			
Ship-To Address	1	<a href="#">EXEC BRANCH</a>	717-787-4719
Location	301375	<a href="#">DGS Bureau of Procurement</a>	717-787-2199

- The draft document generates and the “Edit RFX” screen displays

# Editing a Draft RFX

- The **Start Date** is the earliest *date and time* the suppliers can access the solicitation
  - When creating the solicitation document, allow enough time before the Start Date for the approval process
  - If the solicitation is approved prior to the Start Date, suppliers may see the solicitation on the PA Supplier Portal, but will not be able to open it
- The **Submission Deadline** is the latest *date and time* the suppliers can submit a solicitation
  - This is not the latest date and time the suppliers can access the solicitation – it is the latest they can submit a response

# Editing a Draft RFX

- The **Opening Date** is the *date and time* the responses will be opened
  - This is not the date and time the solicitation is opened for allowing responses – it is the date the responses are opened

# Editing a Draft RFX

## RFX Parameters

[RFX Information](#) | [Bidders](#) | [Items](#) | [Notes and Attachments](#) | [Conditions](#) | [Approval](#) | [Tracking](#)

[RFX Parameters](#) | [Questions](#) | [Notes and Attachments](#) | [Conditions](#)

**Identification**

Smart Number:    
 Smart Number is External

RFX Type:

Bid Description:

Publication Type:

**Event Parameters**

Detailed Price Information:

Follow-On Document:

Bidder Can Change RFX Responses:

Allow Multiple RFX Responses for Each Company:

**Scenario Award/Contract**

**Organization**

Purchasing Organization:

Purchasing Group:  [Show Members](#)

**Dates**

Start Date:

Submission Deadline: \*

Opening Date:

Change does NOT require approval:

**Partners and Delivery Information**

[Details](#) | [Add](#) | [Send E-Mail](#) | [Call](#) | [Clear](#)

[Filter Settings](#)

Function	Number	Name	Phone Number
▪ Requester	703389	<a href="#">Cynthia Anderson</a>	
▪ Goods Recipient	703389	<a href="#">Cynthia Anderson</a>	
▪ Responsible Employee			
▪ Ship-To Address	1	<a href="#">EXEC BRANCH</a>	717-787-4719
▪ Location	301375	<a href="#">DGS Bureau of Procurement</a>	717-787-2199

- The RFX Information tab, RFX Parameters sub-tab contains various elements of the solicitation, which we will discuss into further detail in the following slides.

# Editing a Draft RFx

**Identification**

Smart Number:

Smart Number is External

RFx Type:

Bid Description:

Publication Type:  

- Enter a name for the bid in the Bid Description field
- Select the Publication Type
  - Public
  - Restricted

# Editing a Draft RFX

## Naming Your Document

- There is a 40-character limit on the document's name
  - Characters include letters, punctuation, and spaces
- The name must include:
  - 4-digit UNSPSC code (ref: [www.unspsc.org](http://www.unspsc.org))
  - Space or Dash
  - Noun that describes the item or Contract Title (no abbreviations)
- Example:
  - 2517 Radial Tires

# Editing a Draft RFx

**Organization**

Purchasing Organization:  

Purchasing Group:   [Show Members](#)

**Dates**

Start Date:  

Submission Deadline: \*  

Opening Date:  

Change does NOT require approval:

- Start Date, Submission Deadline, and Opening Date must be in the future
  - Enter as HH/MM/SS
  - Enter time on a 24-hour clock
    - 10:30:00 is 10:30 am
    - 17:00:00 is 5:00 pm

# Editing a Draft RFx



**Event Parameters**

Detailed Price Information: Price with Conditions

Follow-On Document: Contract

**Bidder Can Change RFx Responses:**

Allow Multiple RFx Responses for Each Company:

Scenario Award/Contract

- Always select Price with Conditions from the dropdown menu in the Detailed Price Information field
- Select either Contract or Purchase Order from the Dropdown menu in the Follow-On Document field. Do **not** select the Contract or Purchase option.
- Always select the Bidder Can Change RFx Responses checkbox to indicate that a responder may change a submission up to the solicitation's Submission Deadline
- Do **not** select the Allow Multiple RFx Responses for Each Company, as COPA only permits one bid per supplier

# Editing a Draft RFx

▼ Partners and Delivery Information		
<input type="button" value="Details"/> <input type="button" value="Add"/> <input type="button" value="Send E-Mail"/> <input type="button" value="Call"/> <input type="button" value="Clear"/>		
Function	Number	Name
▪ Requester	703389	<a href="#">Cynthia Anderson</a>
▪ Goods Recipient	703389	<a href="#">Cynthia Anderson</a>
▪ Responsible Employee	703389	<a href="#">Cynthia Anderson</a>
▪ Ship-To Address	1	<a href="#">EXEC BRANCH</a>
▪ Location	301375	<a href="#">DGS Bureau of Procurement</a>

- The Responsible Employee is the sourcing professional who is creating the solicitation document
- All other fields should have defaulted from the Shopping Cart

# Editing a Draft RFx

## Responsible Employee

- The Responsible Employee field is used, among other things, to determine who can view submissions to an RFP and who can view a contract
- The only authorized viewers will be:
  - The creator of the document
  - Designee specified by creator to view the documents in the case of an anticipated absence

# Editing a Draft RFx

## Responsible Employee User Address

- Purchaser must keep their “company” addresses updated in SRM/SAP (Create and Maintain User Address)\*
  - SRM populates the Purchaser’s contact and address information into the Bid Invitation output form
  - The Responsible Employee’s partner number may be entered, or a search can be performed

\*Appendix C - Create and Maintain User Address  
- EUP located on DGS BOP Training Website

# RFX Information Tab – Questions sub-tab

RFX Information | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

RFX Parameters | **Questions** | Notes and Attachments | Conditions

Details | Add Question | Delete | Filter Settings

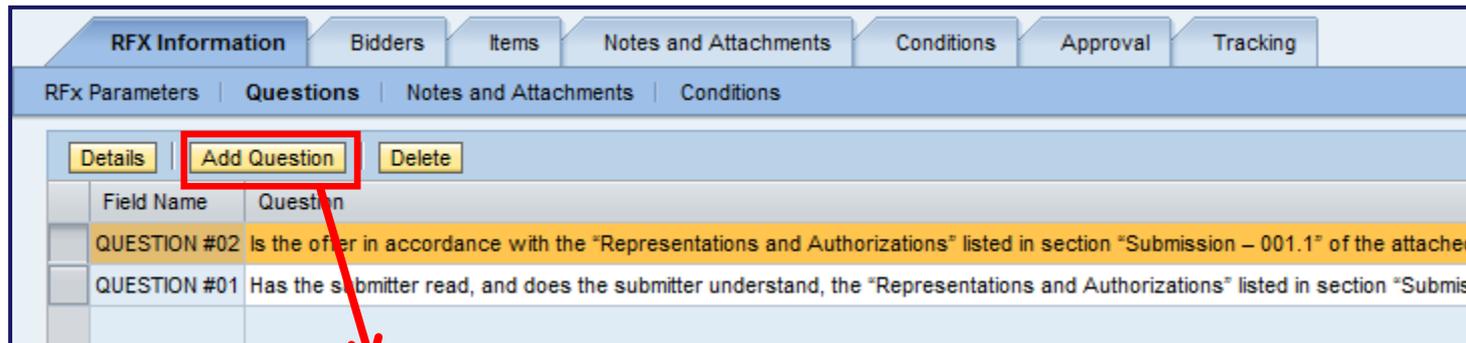
Field Name	Question	Type	Unit	Currency	To Be Weighted	Required	Multi-Select	Comment	Sequence
QUESTION #02	Is the offer in accordance with the "Representations and Authorizations" listed in section "Submission – 001.1" of the attached solicitation document?	CoPA yes or no flag			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0010
QUESTION #01	Has the submitter read, and does the submitter understand, the "Representations and Authorizations" listed in section "Submission – 001.1" of the attached solicitation document?	CoPA yes or no flag			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0020

If available, below you can select fields which can be weighted in addition to header questions. The available fields depend on default settings.

Default Header Fields	To Be Weighted
Field	

- The mandatory Questions default into the solicitation, and therefore do not need to be added manually
  - Selecting the sub-tab activates the questions and will remove any error messages

# RFX Information Tab – Questions sub-tab

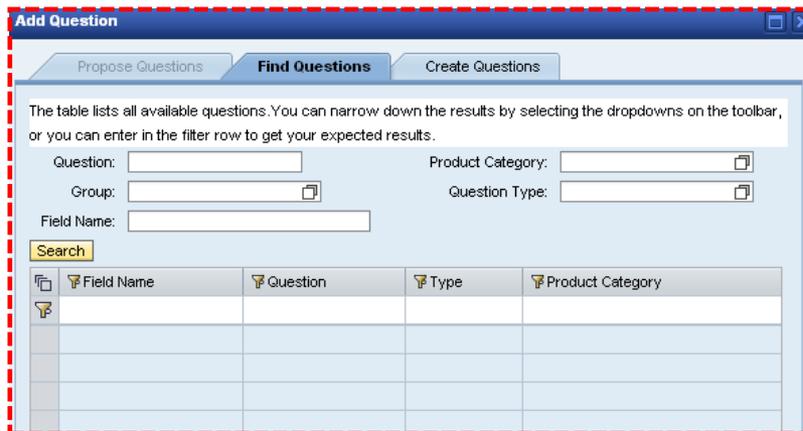


RFX Information | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

RFX Parameters | **Questions** | Notes and Attachments | Conditions

Details | **Add Question** | Delete

Field Name	Question
QUESTION #02	Is the offer in accordance with the "Representations and Authorizations" listed in section "Submission – 001.1" of the attached
QUESTION #01	Has the submitter read, and does the submitter understand, the "Representations and Authorizations" listed in section "Submis



**Add Question**

Propose Questions | **Find Questions** | Create Questions

The table lists all available questions. You can narrow down the results by selecting the dropdowns on the toolbar, or you can enter in the filter row to get your expected results.

Question:  Product Category:

Group:  Question Type:

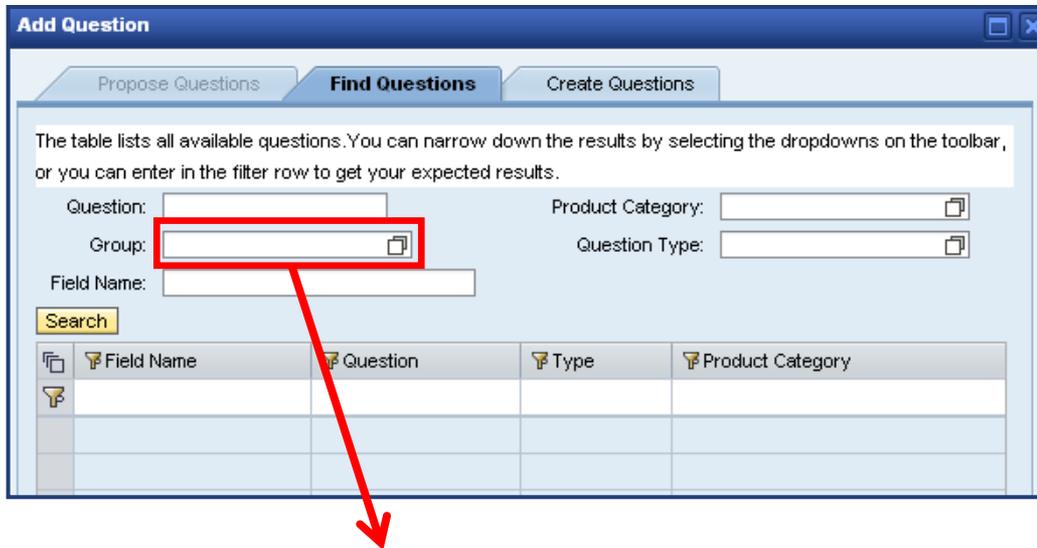
Field Name:

**Search**

Field Name	Question	Type	Product Category

- Optional Questions may be added by selecting the ADD QUESTION button (DGS/BOP functionality)

# RFx Information Tab – Questions sub-tab



**Add Question**

Propose Questions **Find Questions** Create Questions

The table lists all available questions. You can narrow down the results by selecting the dropdowns on the toolbar, or you can enter in the filter row to get your expected results.

Question:  Product Category:

Group:  Question Type:

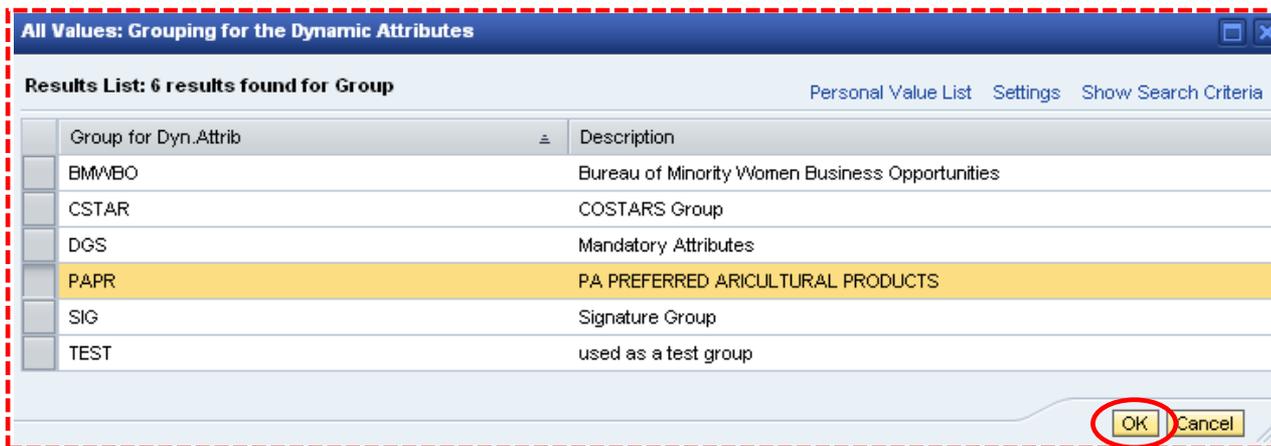
Field Name:

Search

Field Name	Question	Type	Product Category

- To view the optional Questions, select the match code next to the *Group* field

- Choose the Question to be added



**All Values: Grouping for the Dynamic Attributes**

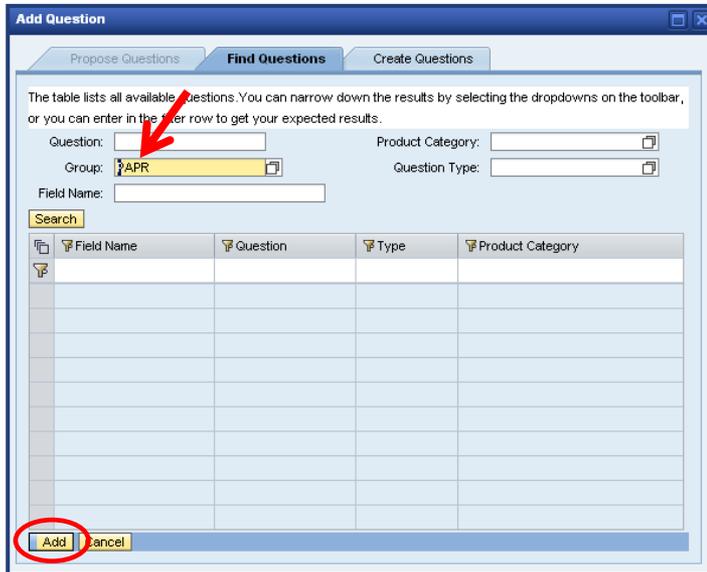
Results List: 6 results found for Group Personal Value List Settings Show Search Criteria

Group for Dyn.Attrib	Description
BMWBO	Bureau of Minority Women Business Opportunities
CSTAR	COSTARS Group
DGS	Mandatory Attributes
PAPR	PA PREFERRED ARICULTURAL PRODUCTS
SIG	Signature Group
TEST	used as a test group

OK Cancel

- Select the OK button

# RFX Information Tab – Questions sub-tab



**Add Question**

Propose Questions | **Find Questions** | Create Questions

The table lists all available questions. You can narrow down the results by selecting the dropdowns on the toolbar, or you can enter in the first row to get your expected results.

Question:  Product Category:

Group: **APR** Question Type:

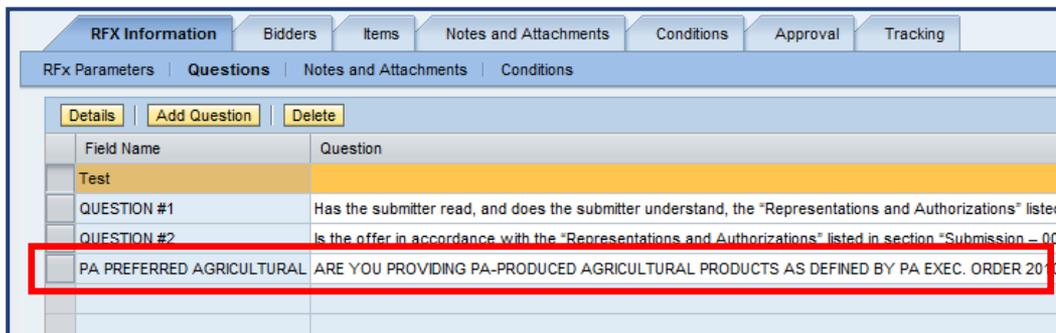
Field Name:

Search

Field Name	Question	Type	Product Category

Add Cancel

- The selected Question is pulled into the *Group* field
  - Select the ADD button



RFX Information | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

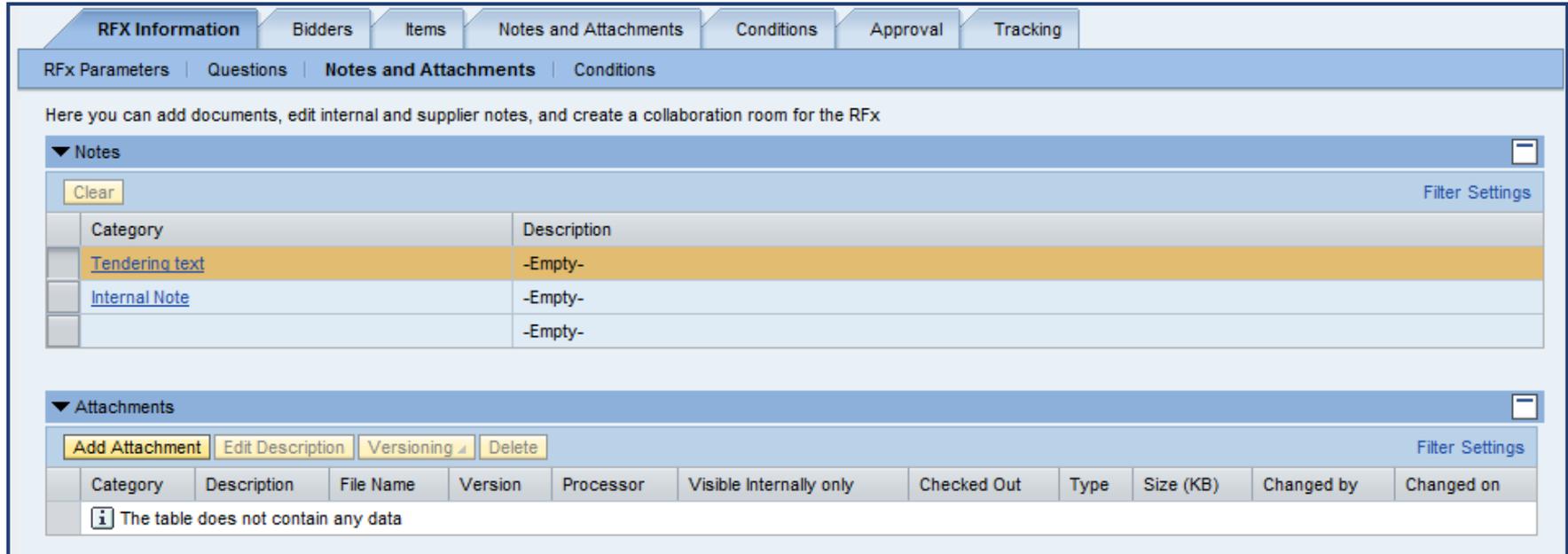
RFX Parameters | **Questions** | Notes and Attachments | Conditions

Details | Add Question | Delete

Field Name	Question
Test	
QUESTION #1	Has the submitter read, and does the submitter understand, the "Representations and Authorizations" listed
QUESTION #2	Is the offer in accordance with the "Representations and Authorizations" listed in section "Submission - 001
PA PREFERRED AGRICULTURAL	ARE YOU PROVIDING PA-PRODUCED AGRICULTURAL PRODUCTS AS DEFINED BY PA EXEC. ORDER 20

- The selected Question is included on the tab

# RFX Information Tab – Notes and Attachments



RFX Information | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

RFX Parameters | Questions | **Notes and Attachments** | Conditions

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFX

▼ Notes Filter Settings

Clear

Category	Description
<a href="#">Tendering text</a>	-Empty-
<a href="#">Internal Note</a>	-Empty-
	-Empty-

▼ Attachments Filter Settings

Add Attachment | Edit Description | Versioning | Delete

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
<span>i</span> The table does not contain any data										

- The RFX Information tab, Notes and Attachments sub-tab is used to display text and attachments
  - Select the link for the type of text to be entered
    - Tendering Text is visible to the supplier
    - Internal Note is visible only to COPA employees

# RFx Information Tab – Notes and Attachments

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes Filter Settings

Clear

Category	Description
<a href="#">Tendering text</a>	-Empty-
<a href="#">Internal Note</a>	-Empty-
	-Empty-

▼ Attachments Filter Settings

Add Attachment Edit Description Versioning Delete

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	<a href="#">EMERGENCY HOSPITAL SERVICES REQUIREMENTS</a>	Emergency Hospital Services Requirements.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	<a href="#">EMS ALS MEDICAL CASE SPECIFICATIONS</a>	EMS ALS Medical Case Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	<a href="#">EMS EMERGENCY STRETCHER SPECIFICATIONS</a>	EMS Emergency Stretcher Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	<a href="#">EMS RESCUE BLANKET SPECIFICATIONS</a>	EMS Rescue Blanket Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013

**Add Tendering text**

Tendering text:

OK Cancel

- To add a Note, select the applicable category
  - Type or paste the text into the box and select the OK button

# RFx Information Tab – Notes and Attachments

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes Filter Settings

Clear

Category	Description
<a href="#">Tendering text</a>	The Commonwealth of PA is seeking certain Emergency Medi...
<a href="#">Internal Note</a>	-Empty-
	-Empty-

▼ Attachments Filter Settings

Add Attachment Edit Description Versioning ▾ Delete

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	<a href="#">EMERGENCY HOSPITAL SERVICES REQUIREMENTS</a>	Emergency Hospital Services Requirements.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	<a href="#">EMS ALS MEDICAL CASE SPECIFICATIONS</a>	EMS ALS Medical Case Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	<a href="#">EMS EMERGENCY STRETCHER SPECIFICATIONS</a>	EMS Emergency Stretcher Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	<a href="#">EMS RESCUE BLANKET SPECIFICATIONS</a>	EMS Rescue Blanket Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013

- Repeat the process to add an Internal Note
- If applicable, utilize the CLEAR button to delete an existing note

# RFx Information Tab – Notes and Attachments

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes Filter Settings

Clear

Category	Description
<a href="#">Tendering text</a>	-Empty-
<a href="#">Internal Note</a>	-Empty-
	-Empty-

▼ Attachments Filter Settings

Add Attachment Edit Description Versioning Delete

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
The table does not contain any data										

**Add Attachment**

Here, you can upload a file and attach it to the header

File:

Description:

Visible Internally only:

- Select the ADD ATTACHMENTS button to browse for the document
  - Attach the document by selecting the OK button

*Note: Do not use any “special characters” in the title of the document that is being attached (i.e., #, \$, &, etc.)*

# RFx Information Tab – Notes and Attachments

DGS met with the Attorney General's (AG) office to discuss some SRM issues from the 7.0 upgrade. As an outcome of that meeting, DGS agreed to the following procedures to assist the AG in its review of Commonwealth contracts.

1. Agencies must notify the Legal Review Section of the AG's office before removing or withdrawing a document from the AG's workflow
2. Upload contract/purchase order attachments in the following order
  - The actual contract, signed by the vendor (if such document exists)
  - Terms and conditions
  - Any “exhibits” in sequential order
  - Statement of Work, RFP, IFB or similar documents that describe the relevant procurement
  - Solicitation materials, i.e. bid tabulation sheet, award letter, sole source justification, etc.
  - Vendor documents, i.e. quote, RFP proposal or other related material
  - Miscellaneous documents that memorialize any pertinent communications regarding the solicitation or contract.

# RFX Information Tab – Notes and Attachments

Label attachment appropriately, (users will need to label the attachments one through nine, as 01 through 09 as indicated below and attachments greater than 09 can use the standard numbering convention of 10 and greater) for example:

01 – Signed Contract

02 – Terms and Conditions

03 – Exhibit A “Exhibit A Title”

04 – Statement of Work

05 – RFP (IFB) 61XXXXXXXXX or RFP (IFB) “Title of RFP (IFB) Project”

06 – Bid Tab

# RFx Information Tab – Notes and Attachments

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes Filter Settings

[Clear](#)

Category	Description
<a href="#">Tendering text</a>	-Empty-
<a href="#">Internal Note</a>	-Empty-
	-Empty-

▼ Attachments Filter Settings

[Add Attachment](#)
[Edit Description](#)
[Versioning](#)
[Delete](#)

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	<a href="#">EMERGENCY HOSPITAL SERVICES REQUIREMENTS</a>	Emergency Hospital Services Requirements.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013

- Following the attachment of a document, an overview of the attachments area will display
  - Mark COPA internal documents as “Visible Internally Only”, preventing them from posting to the supplier portal
  - All documents that should be viewed by the supplier should be left blank so they post to the portal
  - If applicable, utilize available functions to EDIT DESCRIPTION of a document or DELETE a document
  - Repeat the ADD ATTACHMENT process to continue adding attachments

# RFx Information Tab – Notes and Attachments

▼ Attachments

[Add Attachment](#)
[Edit Description](#)
[Versioning ▼](#)
[Delete](#)

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type
Standard Attachment	<a href="#">EMERGENCY HOSPITAL SERVICES REQUIREMENTS</a>	Emergency Hospital Services Requirements.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	doc

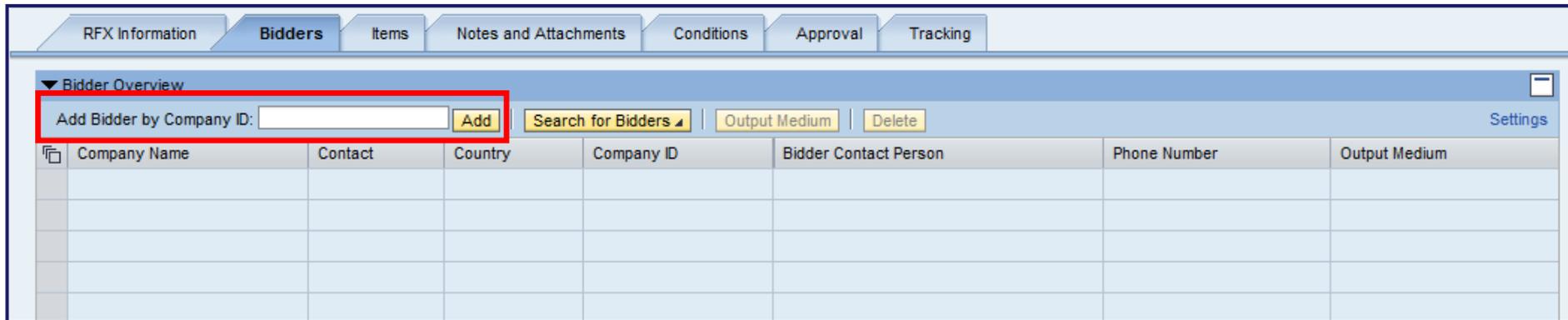
- Do not use the VERSIONING option in the Attachment section
  - If edits to an attachment are required, delete the current version and replace it with the revised version

# RFX Information Tab – Bidders sub-tab

- **Bidders**

- On restricted bid invitations, the solicitation is available only to those suppliers who are identified
- On public bid invitations, any registered supplier with an interest in a particular solicitation posted in the portal may submit a bid response

# RFX Information Tab – Bidders sub-tab



The screenshot displays the 'Bidders' sub-tab interface. At the top, there are navigation tabs: RFX Information, Bidders (selected), Items, Notes and Attachments, Conditions, Approval, and Tracking. Below the tabs is a 'Bidder Overview' section. This section includes a search bar labeled 'Add Bidder by Company ID:' with an 'Add' button next to it. To the right of the search bar are buttons for 'Search for Bidders', 'Output Medium', and 'Delete'. A 'Settings' link is located in the top right corner of the overview section. Below these controls is a table with the following columns: Company Name, Contact, Country, Company ID, Bidder Contact Person, Phone Number, and Output Medium. The table is currently empty.

- A minimum of one bidder must be entered on the Bidder tab in order to satisfy SRM system requirements
- Enter the appropriate supplier number in the Add Bidder by Company ID field, and select the ADD button
  - *Note: The Public Advertising Supplier ID is 815901*

# RFX Information Tab – Bidders sub-tab

Bidding System Navigation						
RFX Information	Bidders	Items	Notes and Attachments	Conditions	Approval	Tracking
▼ Bidder Overview						
Add Bidder by Company ID: <input type="text"/>		Add		Search for Bidders ▾	Send Notifications	Output Medium   Delete
Settings						
Company Name	Contact		Company ID	Bidder Contact Person	Phone Number	Output Medium
MULTI-AWARD PARENT	Multi_Award		305974	305981		Mail
SHAMROCK SPECIALTY SERVICES	Shamrock11 Shamrock11	US	<a href="#">210251</a>	306102	1231231233	Mail
SECCO	Secco11 Secco11	US	<a href="#">210192</a>	306047	1231231233	Mail
EDWIN L HEIM CO	EDWIN11 EDWIN11	US	<a href="#">210187</a>	306026	1231231233	Mail
PENNSYLVANIA INDUSTRIES FOR THE	PIBH Bidder	US	<a href="#">210249</a>	306096	717-214-6627	Mail

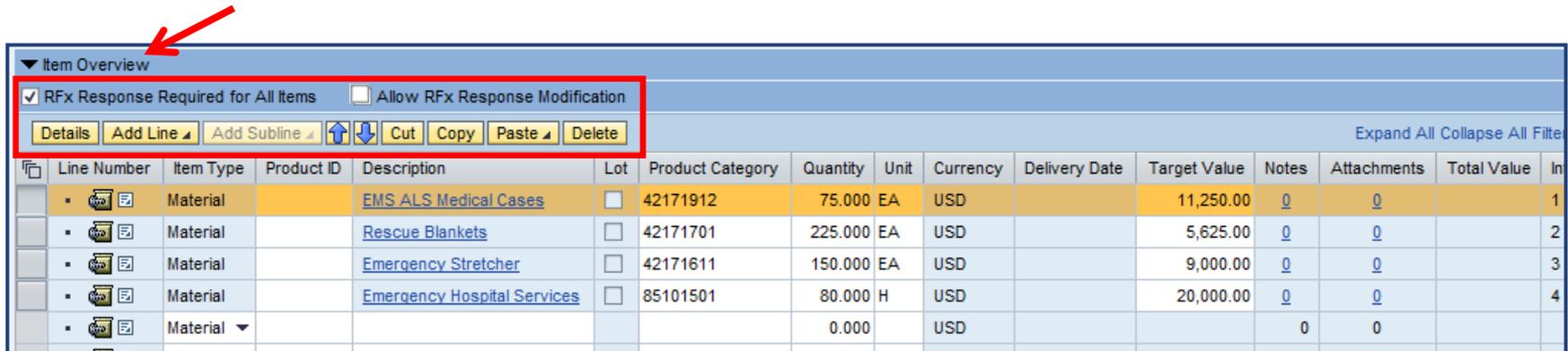
- If the supplier number is not known, it can be located by selecting the SEARCH FOR BIDDERS button
  - Choose the “From Internal Directory” option
  - Do NOT use the “Supplier Directory” option as it is not functional

# Items Tab

RFX Information														
Bidders														
Items														
Notes and Attachments														
Conditions														
Approval														
Tracking														
▼ Item Overview														
<input checked="" type="checkbox"/> RFX Response Required for All Items <input type="checkbox"/> Allow RFX Response Modification														
Details Add Line Add Subline Cut Copy Paste Delete <span style="float: right;">Expand All Collapse All Filter Settings Hide Outline</span>														
Line Number	Item Type	Product ID	Description	Lot	Product Category	Quantity	Unit	Currency	Delivery Date	Target Value	Notes	Attachments	Total Value	Internal Item Number
1	Material		<a href="#">EMS ALS Medical Cases</a>	<input type="checkbox"/>	42171912	75.000	EA	USD		11,250.00	0	0		1
2	Material		<a href="#">Rescue Blankets</a>	<input type="checkbox"/>	42171701	225.000	EA	USD		5,625.00	0	0		2
3	Material		<a href="#">Emergency Stretcher</a>	<input type="checkbox"/>	42171611	150.000	EA	USD		9,000.00	0	0		3
4	Material		<a href="#">Emergency Hospital Services</a>	<input type="checkbox"/>	85101501	80.000	H	USD		20,000.00	0	0		4
	Material					0.000		USD			0	0		
	Material					0.000		USD			0	0		
	Material					0.000		USD			0	0		
	Material					0.000		USD			0	0		
	Material					0.000		USD			0	0		
	Material					0.000		USD			0	0		

- The information on the Items tab should be reviewed for completeness and accuracy
  - Field entry or edits may be made at both the Item Overview and Item Detail level

# Items Tab



Item Overview

RFX Response Required for All Items     Allow RFX Response Modification

Details   Add Line   Add Subline   ↑ ↓   Cut   Copy   Paste   Delete

Line Number	Item Type	Product ID	Description	Lot	Product Category	Quantity	Unit	Currency	Delivery Date	Target Value	Notes	Attachments	Total Value	In
1	Material		EMS ALS Medical Cases	<input type="checkbox"/>	42171912	75.000	EA	USD		11,250.00	0	0		1
2	Material		Rescue Blankets	<input type="checkbox"/>	42171701	225.000	EA	USD		5,625.00	0	0		2
3	Material		Emergency Stretcher	<input type="checkbox"/>	42171611	150.000	EA	USD		9,000.00	0	0		3
4	Material		Emergency Hospital Services	<input type="checkbox"/>	85101501	80.000	H	USD		20,000.00	0	0		4
	Material					0.000		USD			0	0		

- Option to designate *RFX Response Required for All Items* is available at the Item Overview level
- Various action buttons are also present
  - Show Details, Add Line, Cut, move up/down arrows, Copy, Paste, and Delete

# Items Tab

Item Overview

RFX Response Required for All Items  Allow RFX Response Modification

Details Add Line Add Subline Cut Copy Paste Delete Expand All Collapse All Filter Settings Hide Outline

Line Number	Item Type	Product ID	Description	Lot	Product Category	Quantity	Unit	Currency	Delivery Date	Target Value	Notes	Attachments	Total Value	Internal Item Number
1	Material		EMS ALS Medical Cases		42171912	75.000	EA	USD		11,250.00	0	0		1
2	Material		Rescue Blankets		42171701	225.000	EA	USD		5,625.00	0	0		2
3	Material		Emergency Stretcher		42171611	150.000	EA	USD		9,000.00	0	0		3
4	Material		Emergency Hospital Services		85101501	80.000	H	USD		20,000.00	0	0		4
	Material					0.000		USD			0	0		

Item : EMS ALS Medical Cases

Item Data Notes and Attachments Conditions Delivery

Identification

Item Type: Material  
 Product ID:   
 Description: EMS ALS Medical Cases  
 Product Category: 42171912 EMS RESCUE CASES  
 Lot:

Currency: USD  
 Quantity/Unit: 75.000 EA  
 Target Value: 11,250.00 USD

Further Properties

Manufacturer Part Number:   
 External Manufacturer:

Partners and Delivery Information

Details Add Send E-Mail Call Clear Filter Settings

Function	Number	Name	Phone Number
Requester	337344	Angela Eshleman	
Goods Recipient	337344	Angela Eshleman	
Ship-To Address	300001	EXEC BRANCH	
Location	73	DGS	717-787-5996

- Upon selection of the DETAILS button, further details for the line item display below the Item Overview

# Items Tab

Item : EMS ALS Medical Cases

Item Data | Notes and Attachments | Conditions | Delivery

**Identification**

Item Type: Material  
 Product ID:   
 Description: EMS ALS Medical Cases  
 Product Category: 42171912 EMS RESCUE CASES  
 Lot:

Currency: USD  
 Quantity/Unit: 75.000 EA  
 Target Value: 11,250.00 USD

**Further Properties**

Manufacturer Part Number:   
 External Manufacturer:

Partners and Delivery Information

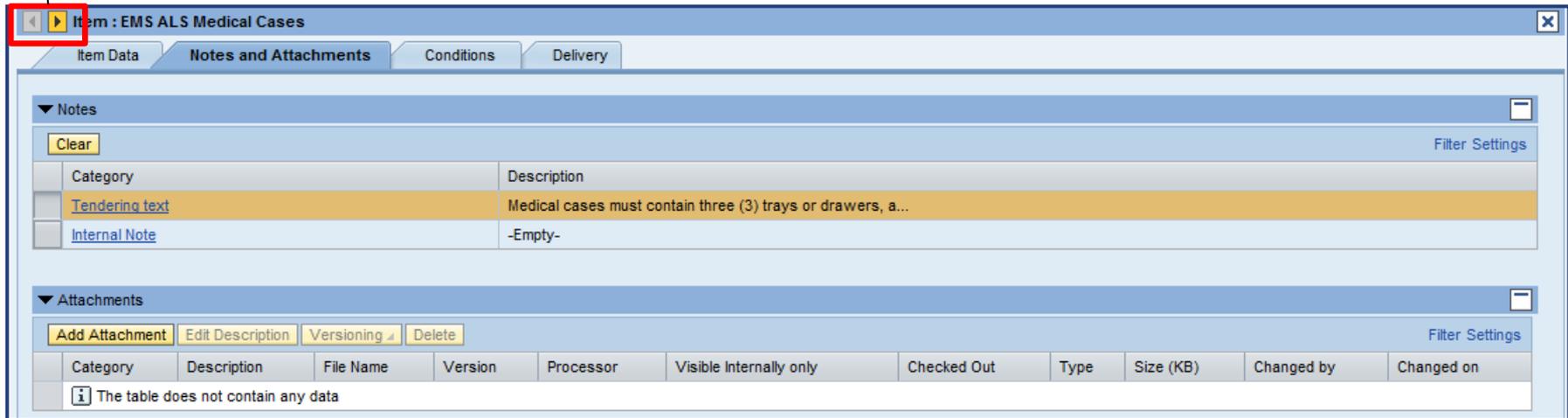
Details Add Send E-Mail Call Clear Filter Settings

Function	Number	Name	Phone Number
Requester	337344	<a href="#">Angela Eshleman</a>	
Goods Recipient	337344	<a href="#">Angela Eshleman</a>	
Ship-To Address	300001	<a href="#">EXEC BRANCH</a>	
Location	73	<a href="#">DGS</a>	717-787-5996

- The line item's Item Data tab contains the Description, Product Category, Quantity, Unit of Measure, Target Value, and Partner and Delivery information

# Items Tab

- Select the navigation arrows to move from item to item within the line item detail



Item : EMS ALS Medical Cases

Item Data | **Notes and Attachments** | Conditions | Delivery

▼ Notes Filter Settings

Clear

Category	Description
<a href="#">Tendering text</a>	Medical cases must contain three (3) trays or drawers, a...
<a href="#">Internal Note</a>	-Empty-

▼ Attachments Filter Settings

Add Attachment | Edit Description | Versioning | Delete

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
The table does not contain any data										

- On the item's Notes and Attachments tab, review the information defaulted from the shopping cart
  - Make any necessary additions or edits

# Preparing for Document Builder

**Edit Rfx :**

Rfx Number	6100004510	Smart Number	15 EMS Supplies_Services FY 14-15	Type	Invitation For Bid	Statu
Number of Suppliers	5	Number of Items	4	Version Number	Version Type	Active Version

- Select the SAVE button to put the solicitation into a Saved status so that the creation of the Document Builder documents can take place
- **Exercise 1 – Create a Solicitation**

<http://eniesrwda01.state.pa.us/gm/folder-1.11.97447?mode=EU>

- From the dropdown, select Simulation

For future reference, go to [www.copacustomhelp.state.pa](http://www.copacustomhelp.state.pa)

- Department of General Services
  - Procurement

# Document Builder

**Display RFX:**

Check Print Preview Close **Related Links ▾** Edit | Refresh | Copy Convert to Auction

**Document Builder**

RFX 15 EMS Supplies\_Services FY 14-15 6100004510 saved

RFX Number	6100004510	Smart Number	15 EMS Supplies_Services FY 14-15	Type	Invitation For Bid	Status	Saved
Number of Suppliers	5	Number of Items	4	Version Number	Version Type	Active Version	External

RFI Information Bidders Items Notes and Attachments Conditions Approval Tracking

- Select the RELATED LINKS button
  - Select Document Builder from the dropdown menu

# What is Document Builder (DB)?

- DB is a software product that works with SRM to create legal documents from Solicitations, Purchase Orders, and Contracts
- DB is used with paper or electronically submitted responses for the creation of Commonwealth procurement documents
- The created SRM document is pulled into DB and, based on the document type and other inputs, the user answers a series of questions that builds a legal document
- DB automatically creates the type of legal document from which DB was launched: RFP, Purchase Order, etc.

# Creating a Legal Document

- DB interfaces with SRM for the creation of legal documents for the following solicitation types:
  - IFB
  - RFP
  - RFQ IT-ITQ
  - SPR
- DB also interfaces with SRM for the creation of legal documents for Contracts and Purchase Orders

# Creating a Legal Document

- Why does the non-IT RFQ not require the use of DB?
  - The non-IT RFQ is only used for acquiring price quotes from suppliers on existing ITQ contracts.

The T&Cs of the contract are associated with the follow-on document (a Purchase Order), so the output of the RFQ will contain language referring the supplier to their contract.

# Creating a Legal Document

- The questions that are answered in DB serve to build the legal document with T&Cs
- Certain T&Cs can be edited or removed; this is done under special circumstances and will be reviewed
- A user can add T&Cs as necessary for special terms
  - Text may be cut and pasted into DB, but it must be in HTML format

# Creating a Legal Document

- SRM automatically routes documents with non-standard T&Cs to identified approvers
  - The Purchaser must check the Non-Standard T&Cs checkbox in order to have the document workflow to the proper approvers

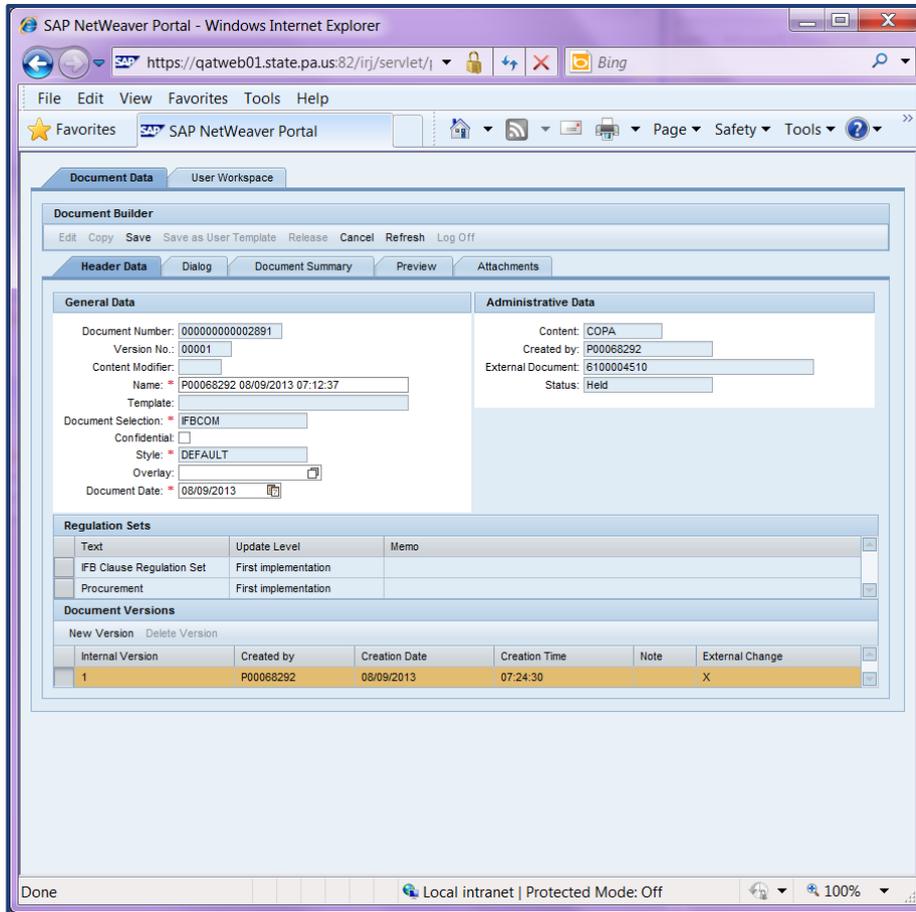
# Creating a Legal Document

- The RFQ IT-ITQ DB template was prepared by OA and DGS with Chief Counsel involvement and should not be edited
  - Through the solicitation process, we are including a statement of work to which the supplier provides a quote
- Contracts already exist with the IT suppliers, with T&Cs which are set, and cannot and should not be changed through the RFQ process
  - The resulting PO cannot add new or conflicting T&Cs because it is against an existing contract, not a new, comprehensive contract document

# Document Builder

- It is a single “click” process to open DB from the solicitation
- Every question must be answered in DB

# Document Builder



SAP NetWeaver Portal - Windows Internet Explorer  
 https://qatweb01.state.pa.us:82/irj/servlet/

Document Builder

Header Data | Dialog | Document Summary | Preview | Attachments

**General Data**

Document Number: 00000000002891  
 Version No.: 00001  
 Content Modifier: [Field]  
 Name: \* P00068292 08/09/2013 07:12:37  
 Template: [Field]  
 Document Selection: \* IFBCOM  
 Confidential:   
 Style: \* DEFAULT  
 Overlay: [Field]  
 Document Date: \* 08/09/2013

**Administrative Data**

Content: COPA  
 Created by: P00068292  
 External Document: B100004510  
 Status: Held

**Regulation Sets**

Text	Update Level	Memo
IFB Clause Regulation Set	First implementation	
Procurement	First implementation	

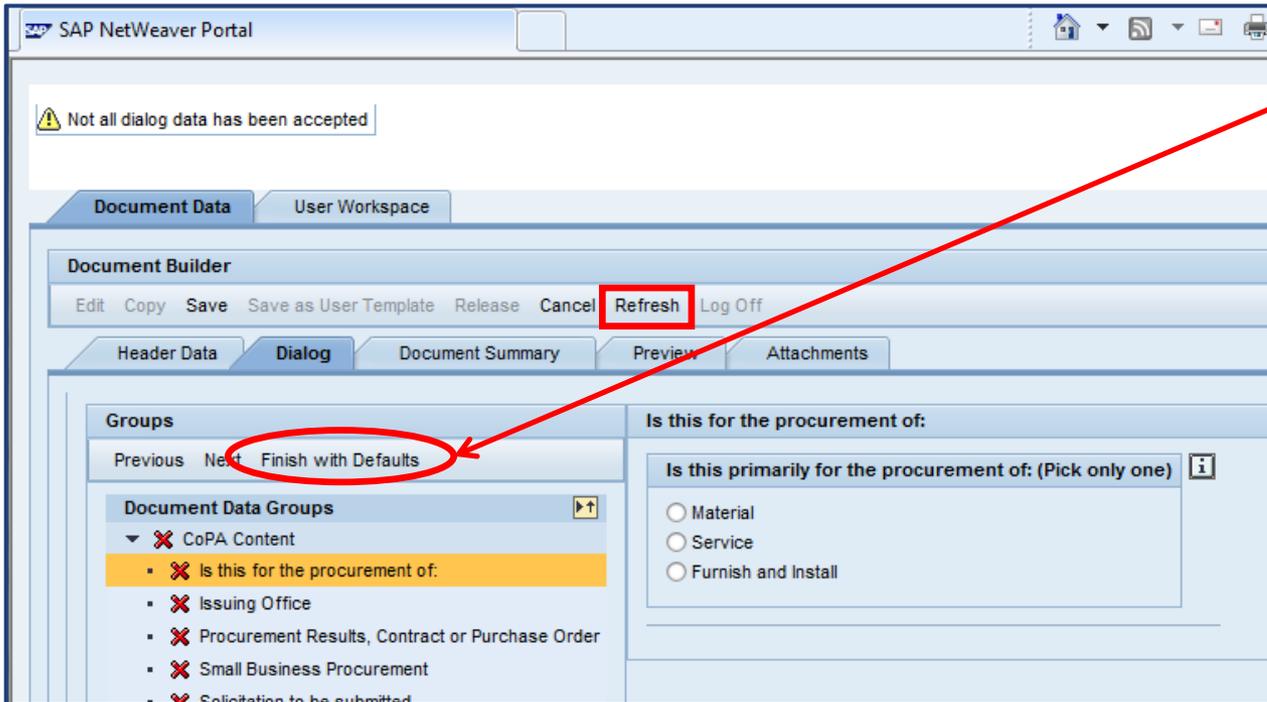
**Document Versions**

Internal Version	Created by	Creation Date	Creation Time	Note	External Change
1	P00068292	08/09/2013	07:24:30		X

Done | Local intranet | Protected Mode: Off | 100%

- DB opens in a new window, on the Header Data tab
  - Verify the information defaulted from SRM
    - Make any necessary additions or edits to required fields

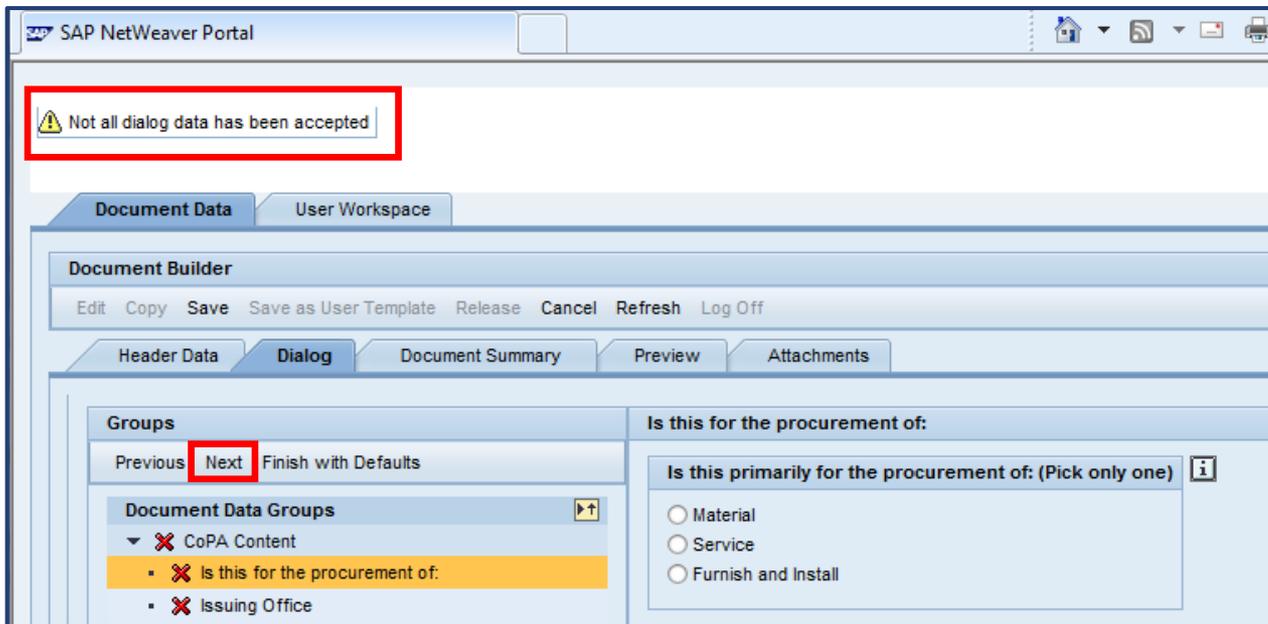
# Document Builder



*Caution: Never use FINISH WITH DEFAULTS; each question should always be responded to individually.*

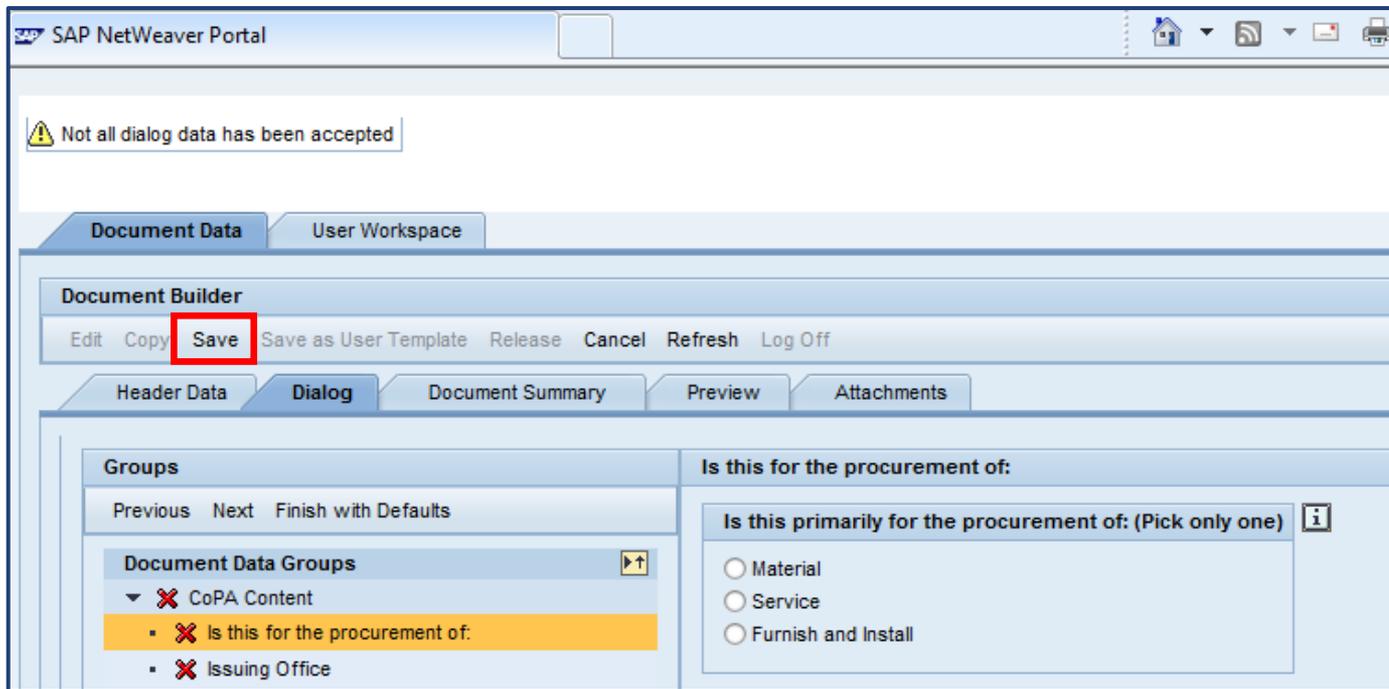
- On the Dialog tab, view each question and, when applicable, respond with an answer
  - Select the REFRESH button after reviewing and/or responding to the question

# Document Builder



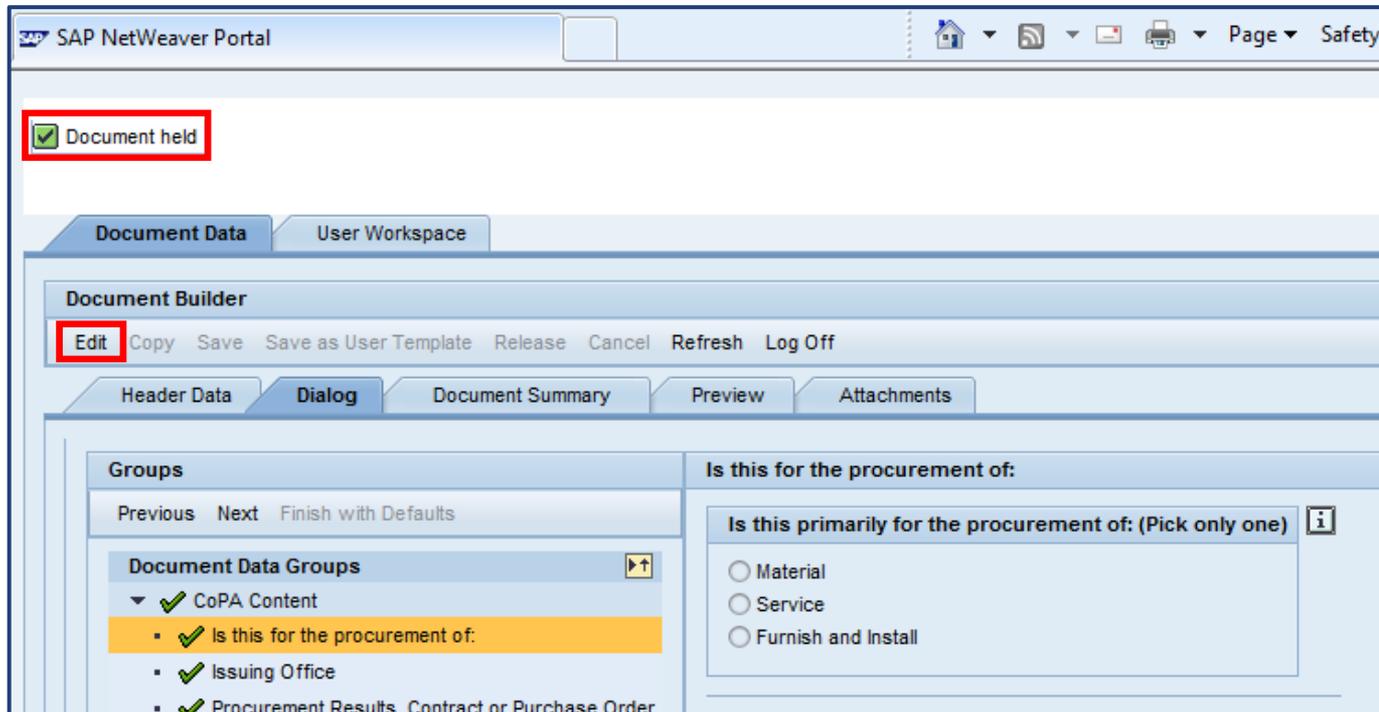
- The default warning message “*Not all dialog data has been accepted*” displays in the upper left corner until all questions have been viewed
- Select the NEXT button to proceed to the next question

# Document Builder



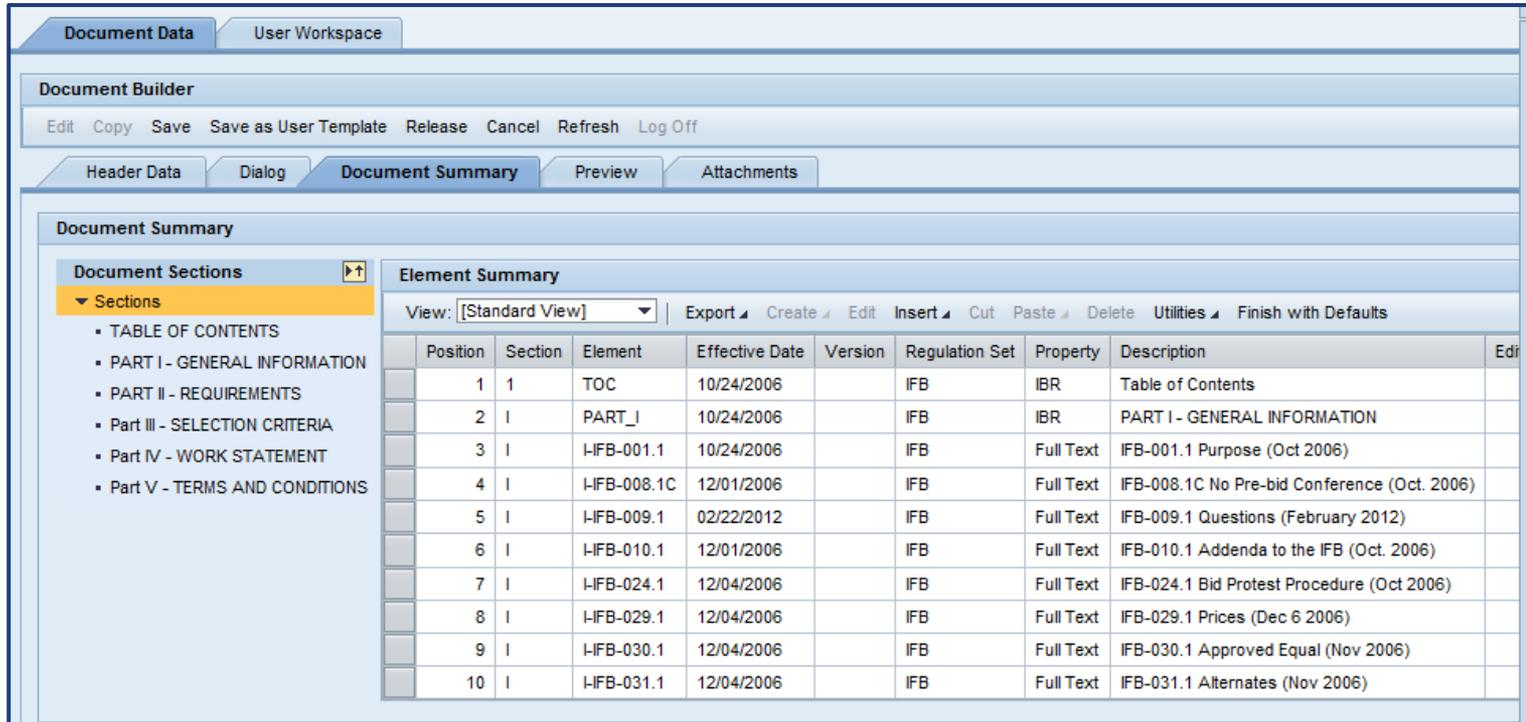
- Select the **SAVE** button at any time to hold and protect your work

# Document Builder



- The message “Document held” displays after saving
- Select the EDIT button to continue viewing/responding to questions

# Document Builder

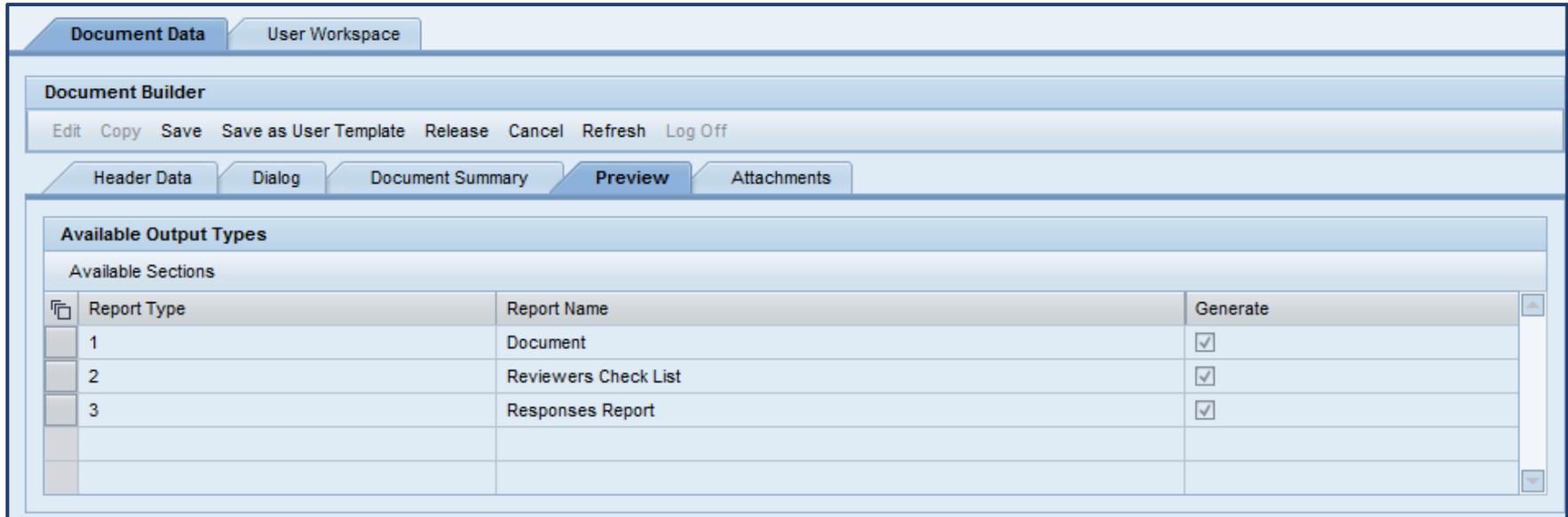


The screenshot shows the Document Builder application interface. The 'Document Summary' tab is active, displaying a table of document elements. The table has columns for Position, Section, Element, Effective Date, Version, Regulation Set, Property, Description, and Edit. The elements listed include the Table of Contents, Part I - General Information, and various sections of the Request for Bid (IFB) such as Purpose, Pre-bid Conference, Questions, Addenda, Bid Protest Procedure, Prices, Approved Equal, and Alternates.

Position	Section	Element	Effective Date	Version	Regulation Set	Property	Description	Edit
1	1	TOC	10/24/2006		IFB	IBR	Table of Contents	
2	I	PART_I	10/24/2006		IFB	IBR	PART I - GENERAL INFORMATION	
3	I	HIFB-001.1	10/24/2006		IFB	Full Text	IFB-001.1 Purpose (Oct 2006)	
4	I	HIFB-008.1C	12/01/2006		IFB	Full Text	IFB-008.1C No Pre-bid Conference (Oct. 2006)	
5	I	HIFB-009.1	02/22/2012		IFB	Full Text	IFB-009.1 Questions (February 2012)	
6	I	HIFB-010.1	12/01/2006		IFB	Full Text	IFB-010.1 Addenda to the IFB (Oct. 2006)	
7	I	HIFB-024.1	12/04/2006		IFB	Full Text	IFB-024.1 Bid Protest Procedure (Oct 2006)	
8	I	HIFB-029.1	12/04/2006		IFB	Full Text	IFB-029.1 Prices (Dec 6 2006)	
9	I	HIFB-030.1	12/04/2006		IFB	Full Text	IFB-030.1 Approved Equal (Nov 2006)	
10	I	HIFB-031.1	12/04/2006		IFB	Full Text	IFB-031.1 Alternates (Nov 2006)	

- The Document Summary tab contains a table which lists the clauses contained in the document; the inclusion or exclusion of clauses is based on your responses

# Document Builder



The screenshot shows the Document Builder interface with the 'Preview' tab selected. The interface includes a menu bar with options like 'Edit', 'Copy', 'Save', 'Save as User Template', 'Release', 'Cancel', 'Refresh', and 'Log Off'. Below the menu bar, there are tabs for 'Header Data', 'Dialog', 'Document Summary', 'Preview', and 'Attachments'. The 'Available Output Types' section contains a table with the following data:

Report Type	Report Name	Generate
1	Document	<input checked="" type="checkbox"/>
2	Reviewers Check List	<input checked="" type="checkbox"/>
3	Responses Report	<input checked="" type="checkbox"/>

- The Preview tab contains three documents (reports) which are automatically generated as the questions on the Dialog tab are completed

# Document Builder – Document (Terms & Conditions)

## Table of Contents

PART I - GENERAL INFORMATION.....	2
I.1 IFB-001.1 Purpose (Oct 2006) .....	2
I.2 IFB-008.1C No Pre-bid Conference (Oct. 2006) .....	2
I.3 IFB-009.1 Questions (February 2012).....	2
I.4 IFB-010.1 Addenda to the IFB (Oct. 2006).....	2
I.5 IFB-024.1 Bid Protest Procedure (Oct 2006).....	2
I.6 IFB-029.1 Prices (Dec 6 2006).....	4
I.7 IFB-031.1 Alternates (Oct 2013).....	4
I.8 IFB-032.1 New Equipment (Nov 2006).....	4
I.9 I-IFB-033.1 Modification or Withdrawal of Bid (Nov 2006).....	4
I.10 I-IFB-034.1 Rejection of Bids (Nov 2006) .....	5

- Document is the complete T&Cs for the solicitation document, in Adobe PDF format. This will need to have the title changed once it is in the solicitation document.

# Document Builder – Reviewer’s Report

## Reviewer's Checklist for P00446880 01/02/2014 11:38:09 on 2014.01.02 (version 1)

Number	Prescription	Source	Section	Name	Title	Changes	Fillins
0001			1	TOC			
0002			I	PART_I	PART I - GENERAL INFORMATION		
0003			I	I-IFB-001.1	IFB-001.1 Purpose (Oct 2006)		PROJECT_TITLE = AGENCY_NAME =
0004			I	I-IFB-008.1C	IFB-008.1C No Pre-bid Conference (Oct. 2006)		
0005			I	I-IFB-009.1	IFB-009.1 Questions (February 2012)		
0006			I	I-IFB-010.1	IFB-010.1 Addenda to the IFB (Oct. 2006)		IFB_AGENCY_WEBSITE =
0007			I	I-IFB-024.1	IFB-024.1 Bid Protest Procedure (Oct 2006)		
0008			I	I-IFB-029.1	IFB-029.1 Prices (Dec 6 2006)		
0009			I	I-IFB-031.1	IFB-031.1 Alternates (Oct 2013)		
0010			I	I-IFB-032.1	IFB-032.1 New Equipment (Nov 2006)		

- Identifies, per clause, all fill-in responses, as well as any edits that were made to the document language.

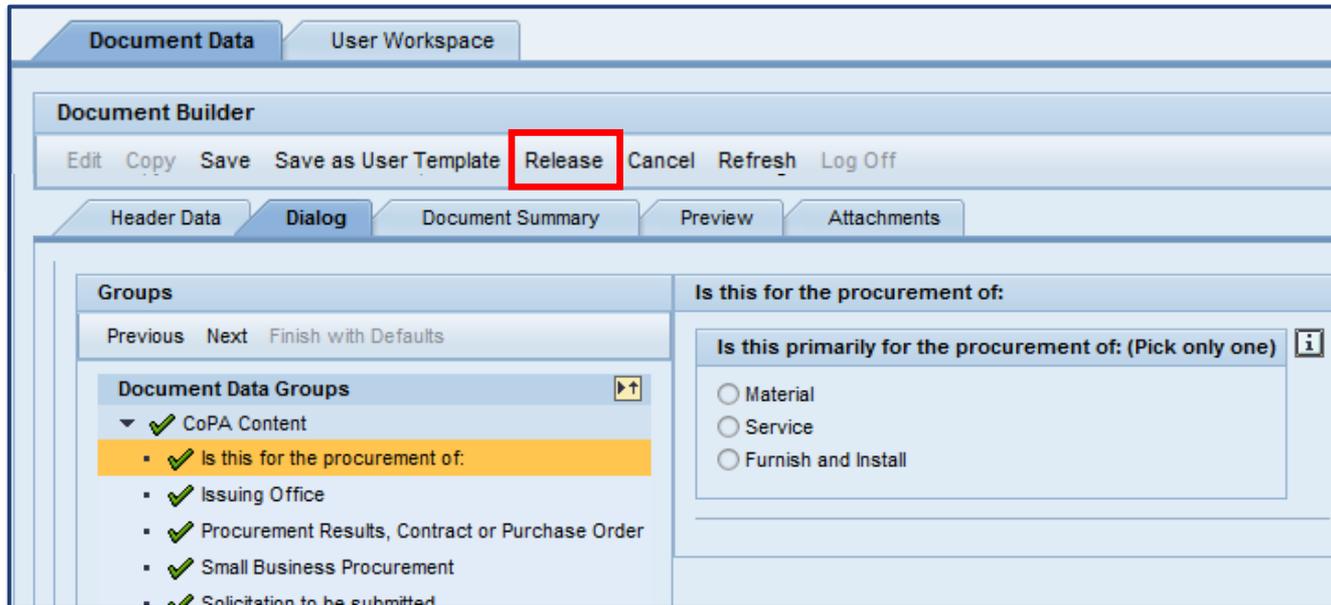
# Document Builder – Responses Report

## Responses Report for P00446880 01/02/2014 11:38:09 on 2014.01.02 (version 1)

Question	Response
Is this primarily for the procurement of: (Pick only one)	
Apparel	
Passenger Vehicles (Automobiles)	
Commercial Vehicles	
PennDOT	
Additional charge per vehicle	0.00
Printing	
Road Materials	
Paper or Paper Products	
Steel Products	
Prior Notification	
On Pallets	
IT	
Laundering Services	
None of the above	

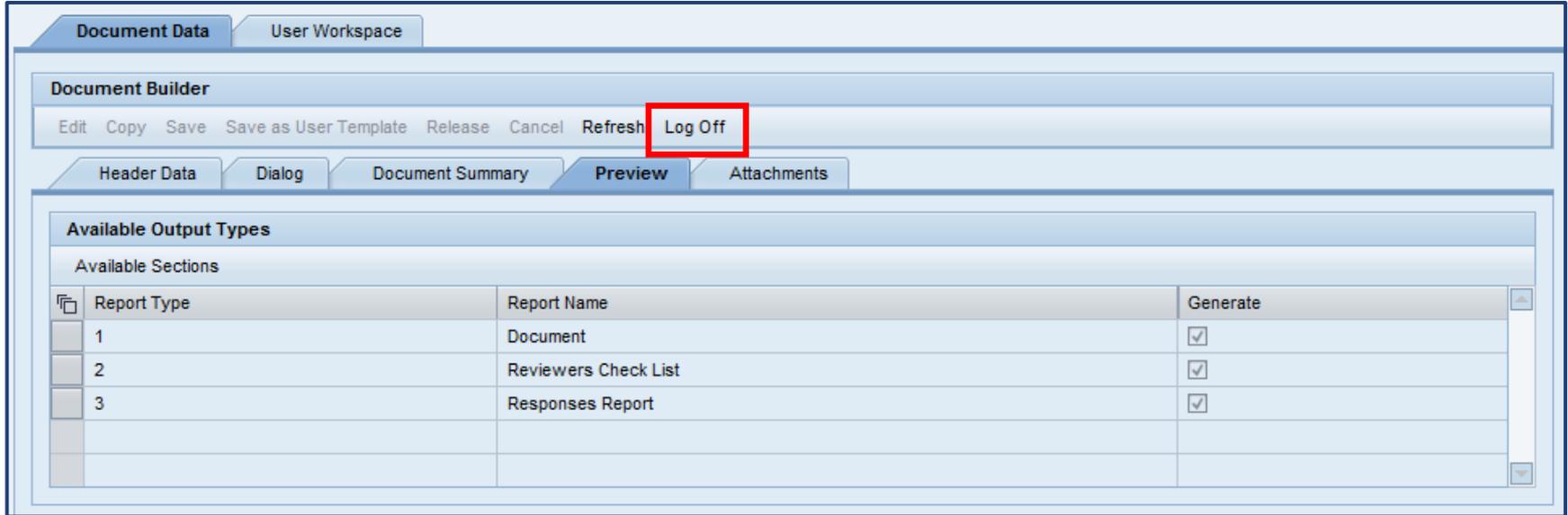
- Identifies, per field, the responses (or lack of) which were entered for each question.

# Document Builder



- The RELEASE button becomes available after all questions have been reviewed/responded to

# Document Builder

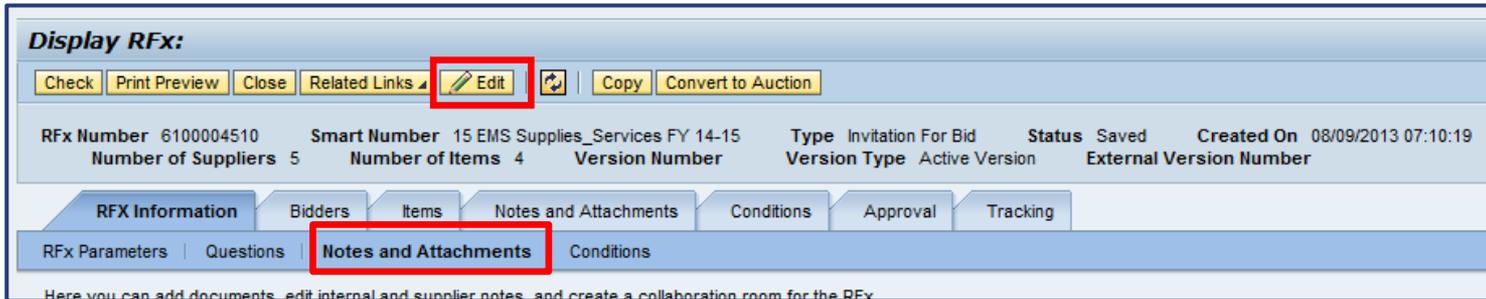


The screenshot shows the Document Builder interface. At the top, there are tabs for 'Document Data' and 'User Workspace'. Below these is a 'Document Builder' header with a menu bar containing 'Edit', 'Copy', 'Save', 'Save as User Template', 'Release', 'Cancel', 'Refresh', and 'Log Off'. The 'Log Off' button is highlighted with a red box. Below the menu bar are tabs for 'Header Data', 'Dialog', 'Document Summary', 'Preview', and 'Attachments'. The main content area is titled 'Available Output Types' and contains a table with the following data:

Available Sections			
<input type="checkbox"/>	Report Type	Report Name	Generate
<input type="checkbox"/>	1	Document	<input checked="" type="checkbox"/>
<input type="checkbox"/>	2	Reviewers Check List	<input checked="" type="checkbox"/>
<input type="checkbox"/>	3	Responses Report	<input checked="" type="checkbox"/>
<input type="checkbox"/>			

- When the legal documents have been migrated into SRM, the RELEASE button is no longer available
- Select the LOG OFF button to exit Document Builder

# Document Builder



**Display RFX:**

Check Print Preview Close Related Links **Edit** Copy Convert to Auction

RFX Number 6100004510 Smart Number 15 EMS Supplies\_Services FY 14-15 Type Invitation For Bid Status Saved Created On 08/09/2013 07:10:19  
Number of Suppliers 5 Number of Items 4 Version Number Version Type Active Version External Version Number

RFX Information Bidders Items **Notes and Attachments** Conditions Approval Tracking

RFX Parameters Questions **Notes and Attachments** Conditions

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFX.

- Select the EDIT button in SRM
  - The documents are attached to the Notes and Attachments sub-tab on the RFX Information tab

# Document Builder

RFX Information | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

RFX Parameters | Questions | **Notes and Attachments** | Conditions

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFX

▼ Notes

Clear

Category	Description
<a href="#">Tendering text</a>	Term will be for 1 year from the effective date of the p...
<a href="#">Internal Note</a>	Justification: Needed for early responders of disaster ...
	-Empty-

▼ Attachments

Add Attachment | Edit Description | Versioning ▲ | Delete

Category	Description	File Name	Version	Processor	Visible Internally only
Standard Attachment	<a href="#">Emergency Medical Supplies and Services Quote</a>	Emergency Medical Supplies and Services Quote.docx	1		<input type="checkbox"/>
Legal Document	<a href="#">Responses Report</a>	Responses Report	1		<input checked="" type="checkbox"/>
Legal Document	<a href="#">Reviewers Check List</a>	Reviewers Check List	1		<input checked="" type="checkbox"/>
Legal Document	<a href="#">Terms and Conditions</a>	Document	1		<input type="checkbox"/>

- Locate the attachment titled “Document” and change it to “Terms and Conditions”
- Mark the other 2 documents “Visible Internally Only” by putting checks in the checkboxes

# Notes and Attachments Tab

RFX Information		Bidders	Items	Notes and Attachments	Conditions	Approval	Tracking
▼ Notes							
Add ▲ Clear							
Assigned To	Category	Text Preview					
Document Header	<a href="#">Tendering text</a>	Term will be for 1 year from the effective date of the p...					
Document Header	<a href="#">Internal Note</a>	Justification: Needed for early responders of disaster ...					
▼ Attachments							
Add Attachment Edit Description Versioning ▲ Delete							
Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	
Document Header	Standard Attachment	<a href="#">Emergency Medical Supplies and Services Quote</a>	Emergency Medical Supplies and Services Quote.docx	1		<input type="checkbox"/>	
Document Header	Legal Document	<a href="#">Responses Report</a>	Responses Report	1		<input checked="" type="checkbox"/>	
Document Header	Legal Document	<a href="#">Reviewers Check List</a>	Reviewers Check List	1		<input checked="" type="checkbox"/>	
Document Header	Legal Document	<a href="#">Terms and Conditions</a>	Document	1		<input type="checkbox"/>	

- The primary Notes and Attachments tab is a collection of all notes and attachments from the entire document
  - The “Assigned To” column identifies whether they are at the Document Header or Item level
  - Additions or edits to any notes or attachments may be made on this tab

# Approval Tab

**Edit Rfx :**

[Publish](#) [Check](#) [Save](#) [Print Preview](#) [Close](#) [Related Links](#) [Read Only](#)

Rfx Number: 6100027171    Smart Number: CKA Rfx Demo 1-2-14    Type: Invitation For Bid    Status: Saved    Created On: 01/02/2014 11:19:38    Created By: Cynthia Anderson    Time Zone: EST    Number of Suppliers: 1    Number of Items: 3  
 Version Number    Version Type: Active Version    External Version Number

[RFX Information](#)   [Bidders](#)   [Items](#)   [Notes and Attachments](#)   [Conditions](#)   **[Approval](#)**   [Tracking](#)

Current Status:     Header Approval Note:   
 Current Process Step:   
 Currently Processed By:   
 Approval Process Data: [Download as XML](#)

[Header](#)   [Item](#)

**Header Approval Status**

[Remove Approver](#) [Settings](#)

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
• 001	SRM Rfx Approval	Open (No Decision Made)	Cheryl Kleeman, Joe Shiffer, Brian Reinohl, Richard Gaul, Gregory Knerr, Thomas Te			

- Select the Approval Tab to review the levels of approval required

# Tracking Tab

[RFX Information](#)
[Bidders](#)
[Items](#)
[Notes and Attachments](#)
[Conditions](#)
[Approval](#)
**[Tracking](#)**

▼ History Filter Settings

View: United States Dollar

Document	Name	Document Number	Back-End Document Number	Status	Date
Shopping Cart	CKA Test Cart for Demo 1-2-14	<a href="#">11512654</a>		Approved	01/02/2014
RFX	CKA RFX Demo 1-2-14	<a href="#">6100027171</a>		Saved	01/02/2014

▼ Status Filter Settings

**System Status**  
Created > Incomplete > Held

▼ Version Overview Filter Settings

[Detail](#) [Compare](#)

Version	Document/Version Type	Created On	Changed On	Document Name	External Version Number
	Active Document	01/02/2014 11:19:38	01/02/2014 11:39:33	CKA RFX Demo 1-2-14	

▼ Change Documents Filter Settings

Changed Since 
 Changed From/To  
[Search](#)

[Expand All](#)
[Collapse All](#)
[Hide Query](#)
[Filter](#)
[Settings](#)

Header/Item Attribute	Old Value	New Value	Changed By	Changed On	Changed At	Version
▶ Header						

- Select the Tracking Tab to review the History, Status, Version Overview, and/or Change Documents of the Solicitation

# Publishing the RFx

**Edit RFx :**

RFx is complete and contains no errors

RFx Number	6100004510	Smart Number	15 EMS Supplies_Services FY 14-15	Type	Invitation For Bid	Status	Saved	Created On	08/09/2014
Number of Suppliers	5	Number of Items	4	Version Number	Version Type	Active Version	External Version Number		

**Identification**
**Event Parameters**

Smart Number: 
Detailed Price Information:

Smart Number is External
 Follow On Document:

- Select the CHECK button to view and resolve any errors
- Select the PUBLISH button to send the RFx document through approval workflow

# Editing a Draft RFX

- **Exercise 2 – Create a Document Builder Document**

<http://eniesrwd01.state.pa.us/gm/folder-1.11.97451?mode=EU>

- From the dropdown, select Simulation

# Advertising Solicitations

# Advertising Overview

## Posting the Solicitation to the Portal

### Solicitation Publication Reminders:

- After creating the final legal document in Doc Builder and attaching it to the Solicitation document, select the PUBLISH button
  - SRM will automatically begin the following processes:
    - Workflow and Approvals
    - Publication to the Supplier Portal
  - The Solicitation will become visible to the suppliers, and open for response, when the Solicitation *Start Date* has been reached

# Advertising Overview

## Advertising Protocol

- A requirement to post this advertisement to eMarketplace is the creation and approval of the Notice of Forthcoming Procurement (NFP) form
  - The advertisement form contains a mandatory field for the NFP ID number generated when the form is created
  - More information on this form can be found in the Procurement Handbook, Part 1, Chapter 4, as well as Part 2, Chapter 4

# Advertising Overview

## Advertising Protocol

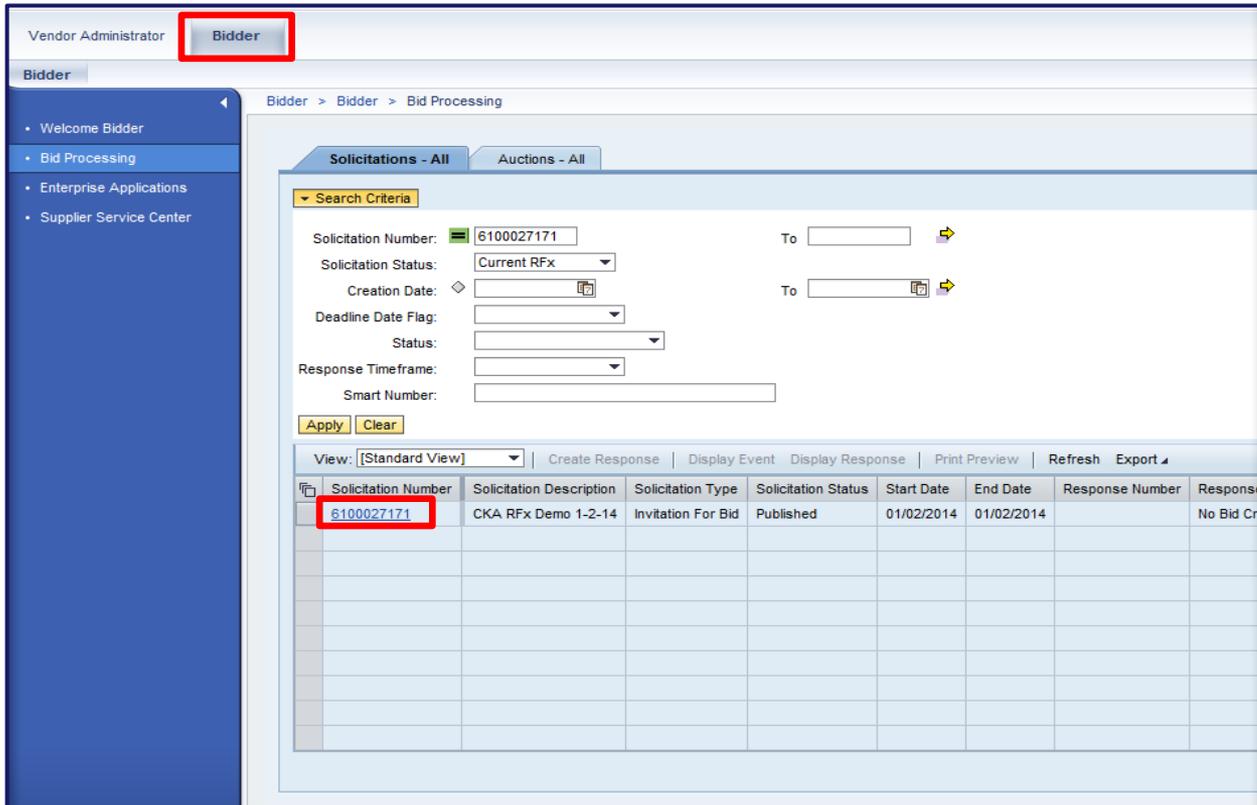
- Posting the advertisement to eMarketplace provides minimal information about the Solicitation, and refers potential responders to the portal
  - Portal contains full information for registered suppliers
  - Registered suppliers can submit electronic solicitation responses directly through the portal
- This should be done only once the Solicitation has been fully approved
  - Posting to eMarketplace prior to being fully approved or prior to the Start Date will only confuse suppliers

# Advertising Overview

For step-by-step instructions to submitting the Request to Advertise Online form, refer to the eMarketplace website at [www.emarketplace.state.pa.us](http://www.emarketplace.state.pa.us) and choose the “Help” link

# Bidders Response

# Bidders Response



The screenshot shows the PA Supplier Portal interface. At the top, there are two tabs: "Vendor Administrator" and "Bidder", with the "Bidder" tab highlighted and circled in red. Below the tabs is a navigation menu with options: "Welcome Bidder", "Bid Processing" (highlighted), "Enterprise Applications", and "Supplier Service Center". The main content area is titled "Bidder > Bidder > Bid Processing" and contains two sub-tabs: "Solicitations - All" (active) and "Auctions - All".

Under the "Solicitations - All" tab, there is a "Search Criteria" section with the following fields:

- Solicitation Number:  To
- Solicitation Status:
- Creation Date:  To
- Deadline Date Flag:
- Status:
- Response Timeframe:
- Smart Number:

Below the search criteria are "Apply" and "Clear" buttons. At the bottom of the search section, there is a "View: [Standard View]" dropdown and a row of action buttons: "Create Response", "Display Event", "Display Response", "Print Preview", "Refresh", and "Export".

The main area displays a table of solicitations:

Solicitation Number	Solicitation Description	Solicitation Type	Solicitation Status	Start Date	End Date	Response Number	Response
6100027171	CKA RFX Demo 1-2-14	Invitation For Bid	Published	01/02/2014	01/02/2014		No Bid Cre

- Bidder logs into PA Supplier Portal, selects the bidder tab
- Selects the bid they are interested in responding to

# Bidders Response

**Display Solicitation :**

**Solicitation Number** 6100027171   
**Description** CKA RFX Demo 1-2-14   
**Status** Published   
**Start Date** 13:00:00 EST   
**Submission Deadline** 13:30:00 EST  
**Remaining Time** 0 Days 00:28:34   
**Solicitation Owner** Cynthia Anderson   
**Version Number** 1   
**Version Type** Active Version

Time Zone:                       Bid Name: \*   
Start Date:    
Submission Deadline: \*    
Opening Date:    
Change does NOT require approval:

▼ Partners and Delivery Information

Function	Number	Name	Phone Number
▪ Requester		Cynthia Anderson	
▪ Goods Recipient		Cynthia Anderson	
▪ Responsible Employee		Cynthia Anderson	
▪ Ship-To Address		EXEC BRANCH	717-787-4719
▪ Location		DGS Bureau of Procurement	717-787-2199

- When the bid displays, the bidder must select the REGISTER button

# Bidders Response

**Display Solicitation :**

Print Preview |  Close **Create Response** Export 

You are registered to the RFx and will be informed of changes

---

Solicitation Number 6100027171    Description CKA RFx Demo 1-2-14    Status Published    Start Date 13:00:00 EST    Submission Deadline 13:30:00 EST  
 Remaining Time 0 Days 00:25:28    Solicitation Owner Cynthia Anderson    Version Number 1    Version Type Active Version

**Header**    Items

Basic Data | Questions | Note and Attachments | Conditions

Time Zone: EST    Bid Name: \* CKA RFx Demo 1-1-14

Start Date: 01/02/2014 13:00:00

Submission Deadline: \* 01/02/2014 13:30:00

Opening Date: 01/02/2014 13:31:00

Change does NOT require approval:

**Partners and Delivery Information** 

Details Add  Send E-Mail Call Clear Filter Settings

Function	Number	Name	Phone Number
Requester		Cynthia Anderson	
Goods Recipient		Cynthia Anderson	
Responsible Employee		Cynthia Anderson	
Ship-To Address		EXEC BRANCH	717-787-4719
Location		DGS Bureau of Procurement	717-787-2199

- Once the REGISTER button is selected, a message will display stating, “You are registered to the RFx and will be informed of changes.” The bidder then must select the CREATE RESPONSE button to start the bid response process.

# Bidders Response

**Create Response**

Submit | Read Only | Print Preview | Check | Close | Save

! Question "Has the submitter read, and does the submitter und" is mandatory; maintain Question value

! Question "Is the offer in accordance with the "Representatio" is mandatory; maintain Question value

Solicitation Response Number 6500068157    Solicitation Number 6100027171    Status In Process    Submission Deadline 01/02/2014 13:30:00 EST    Opening Date 01/02/2014 13:31:00 EST    Solicitation Owner 0 Days 00:22:52    RFX Owner Cynthia Anderson    Response Version Number 0.00 USD

Version Number Active Version    RFX Version Number 1

Header | Items | Summary | Tracking

Basic Data | Questions | Notes and Attachments

**Event Parameters**

Validity Period:  -

Currency:

Target Value of RFX Response:  USD

**Status and Statistics**

Created On:

Created By:

Last Processed On:

Last Processed By:

▼ Partners and Delivery Information

Details | Send E-Mail | Call | Clear    Filter Settings

Function	Number	Name	Phone Number
• Goods Recipient		Cynthia Anderson	
• Ship-To Address		EXEC BRANCH	717-787-4719
• Location		DGS Bureau of Procurement	717-787-2199

- An error message will display stating that the Mandatory Questions must be completed

# Bidders Response

Header	Items	Summary	Tracking
Basic Data	<b>Questions</b>	Notes and Attachments	
Question		Reply	Comment
Is the offer in accordance with the "Representations and Authorizations" listed in section "Submission - 001.1" of the attached solicitation document?:		<input type="text" value="Y: Yes"/>	<input type="text"/>
Has the submitter read, and does the submitter understand, the "Representations and Authorizations" listed in section "Submission - 001.1" of the attached solicitation document?:		<input type="text"/>	<input type="text"/>

- The bidder must select the Questions sub-tab on the Header tab and answer the Questions by selecting the appropriate answer from the dropdown menu

# Bidders Response

**Create Response**

Submit | Read Only | Print Preview | Check | Close | Save

Solicitation Response Number 6500068157    Solicitation Number 6100027171    Status In Process    Submission Deadline 01/02/2014 13:30:00 EST    Opening Date 01/02/2014 13:31:00 EST    Solicitation Owner 0 Days 00:21:42    RFX Owner Cynthia Anderson    Response Version Number 0.00 USD

Version Number Active Version    RFX Version Number 1

Header **Items** Summary Tracking

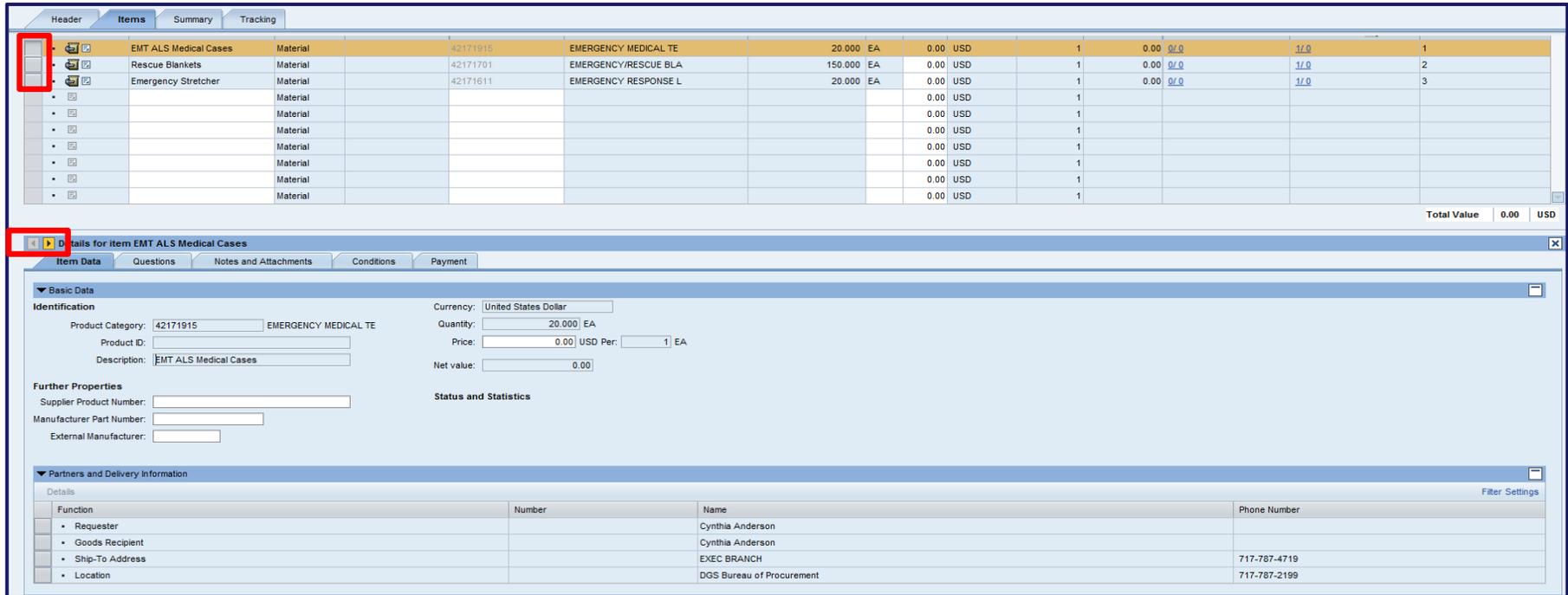
▼ Item Overview

Details Add New Copy Paste Delete Calculate Value Filter Expand All Collapse All Settings

Line Number	Description	Item Type	Product ID	Product Category	Product Category Description	Required Quantity	Unit	Price	Currency	Price Per	Total Value	RFX / Response (j)	RFX / Response (k)	Internal Item Number
•	EMT ALS Medical Cases	Material	42171815	EMERGENCY MEDICAL TE		20.000	EA	0.00	USD	1	0.00	0/0	1/0	1
•	Rescue Blankets	Material	42171701	EMERGENCY/RESCUE BLA		150.000	EA	0.00	USD	1	0.00	0/0	1/0	2
•	Emergency Stretcher	Material	42171611	EMERGENCY RESPONSE L		20.000	EA	0.00	USD	1	0.00	0/0	1/0	3
•		Material						0.00	USD	1				
•		Material						0.00	USD	1				
•		Material						0.00	USD	1				
•		Material						0.00	USD	1				
•		Material						0.00	USD	1				
•		Material						0.00	USD	1				
•		Material						0.00	USD	1				
											Total Value	0.00	USD	

- The bidder then selects the items tab and reviews the information
- Selecting the DETAILS button will allow for further review of the line item details

# Bidders Response



The screenshot displays the 'Bidders Response' interface. At the top, there are tabs for 'Header', 'Items', 'Summary', and 'Tracking'. Below these is a table of items. A red box highlights the first column of the table, which contains navigation arrows. The table lists items such as 'EMT ALS Medical Cases', 'Rescue Blankets', and 'Emergency Stretcher'. Below the table, there is a section for 'Details for item EMT ALS Medical Cases'. This section has tabs for 'Item Data', 'Questions', 'Notes and Attachments', 'Conditions', and 'Payment'. The 'Item Data' tab is active, showing 'Basic Data' and 'Partners and Delivery Information'. The 'Basic Data' section includes fields for 'Identification', 'Further Properties', and 'Status and Statistics'. The 'Partners and Delivery Information' section includes a table with columns for 'Function', 'Number', 'Name', and 'Phone Number'.

Item ID	Description	Material	Product Category	Product ID	Description	Quantity	Unit	Price	Currency	USD Per	EA	Total Value	Order	Line
42171915	EMT ALS Medical Cases	Material	EMERGENCY MEDICAL TE		EMERGENCY MEDICAL TE	20,000	EA	0.00	USD		1	0.00	0/0	1/0
42171701	Rescue Blankets	Material	EMERGENCY/RESCUE BLA		EMERGENCY/RESCUE BLA	150,000	EA	0.00	USD		1	0.00	0/0	1/0
42171611	Emergency Stretcher	Material	EMERGENCY RESPONSE L		EMERGENCY RESPONSE L	20,000	EA	0.00	USD		1	0.00	0/0	1/0

**Details for item EMT ALS Medical Cases**

**Item Data** | Questions | Notes and Attachments | Conditions | Payment

**Basic Data**

**Identification**

Product Category: 42171915 EMERGENCY MEDICAL TE  
 Product ID:   
 Description: EMT ALS Medical Cases

Currency: United States Dollar  
 Quantity: 20,000 EA  
 Price: 0.00 USD Per: 1 EA  
 Net value: 0.00

**Further Properties**

Supplier Product Number:   
 Manufacturer Part Number:   
 External Manufacturer:

**Status and Statistics**

**Partners and Delivery Information**

Function	Number	Name	Phone Number
Requester		Cynthia Anderson	
Goods Recipient		Cynthia Anderson	
Ship-To Address		EXEC BRANCH	717-787-4719
Location		DGS Bureau of Procurement	717-787-2199

- In the item details, the bidder can enter the pricing for each of the line items and any other information pertinent to the line item
- Navigation through the lines items is done by using the navigation arrows or by selecting the line item in the item overview

# Bidders Response

**Create Response**

Submit | Read Only | Print Preview | Check | Close | Save

<b>Solicitation Response Number</b> 6500068157	<b>Solicitation Number</b> 6100027171	<b>Status</b> In Process	<b>Submission Deadline</b> 01/02/2014 13:30:00 EST	<b>Opening Date</b> 01/02/2014
<b>Version Number</b> Active Version	<b>RFX Version Number</b> 1			

Header

Items

**Summary**

Tracking

RFX Response Number:	6500068157
Items with Response:	3 out of 3 items responded to
Questions:	2 out of 2 questions answered ( 2 out of 2 mandatory)
Notes:	3 notes added
Attachments:	No Attachments Added
Conditions:	3 conditions added
<b>Total RFX Response Value:</b>	<b>8,093.00 USD</b>

- The bidder can then select the Summary tab to review the information from the Bid Response

# Bidders Response

**Create Response**

RFX response is complete and contains no errors

Solicitation Response Number 6500068157      Solicitation Number 6100027171  
Version Number Active Version      RFX Version Number 1

**Create Response**

|  |  |

RFX response 6500068157 submitted

Solicitation Response Number 6500068157      Solicitation Number 6100027171  
Version Number Active Version      RFX Version Number 1

- Once all information has been entered, the bidder selects the CHECK button to make sure the response is complete and contains no errors
- If there are no errors, the bidder can select the SUBMIT button. A message will display stating, “RFX response 65xxxxxxx submitted.”



**pennsylvania**

DEPARTMENT OF GENERAL SERVICES

# **Responses and Awards**

# Receive Responses Overview

## Protocol for Public Openings: IFB

### General Reminders:

- Purchaser specifies time and place of opening in the solicitation document (paper or electronic)
- The Public Bid Opening procedure, as issued in the Procurement Handbook, will be followed
- Purchaser generates a bid tabulation spreadsheet showing only the Responders' names and their bid amounts for units awarded (item, lot, or total, as appropriate)

# Receive Responses Overview

## General Reminders (cont'd):

- The bid tabulation must be posted on the eMarketplace website after the opening, under the Solicitation Tabulation section (**not** the award section)
- For RFPs, the Notice of Contractor Selection memo must be uploaded
  - Instructions on how to post this information can be found in the Help section on eMarketplace

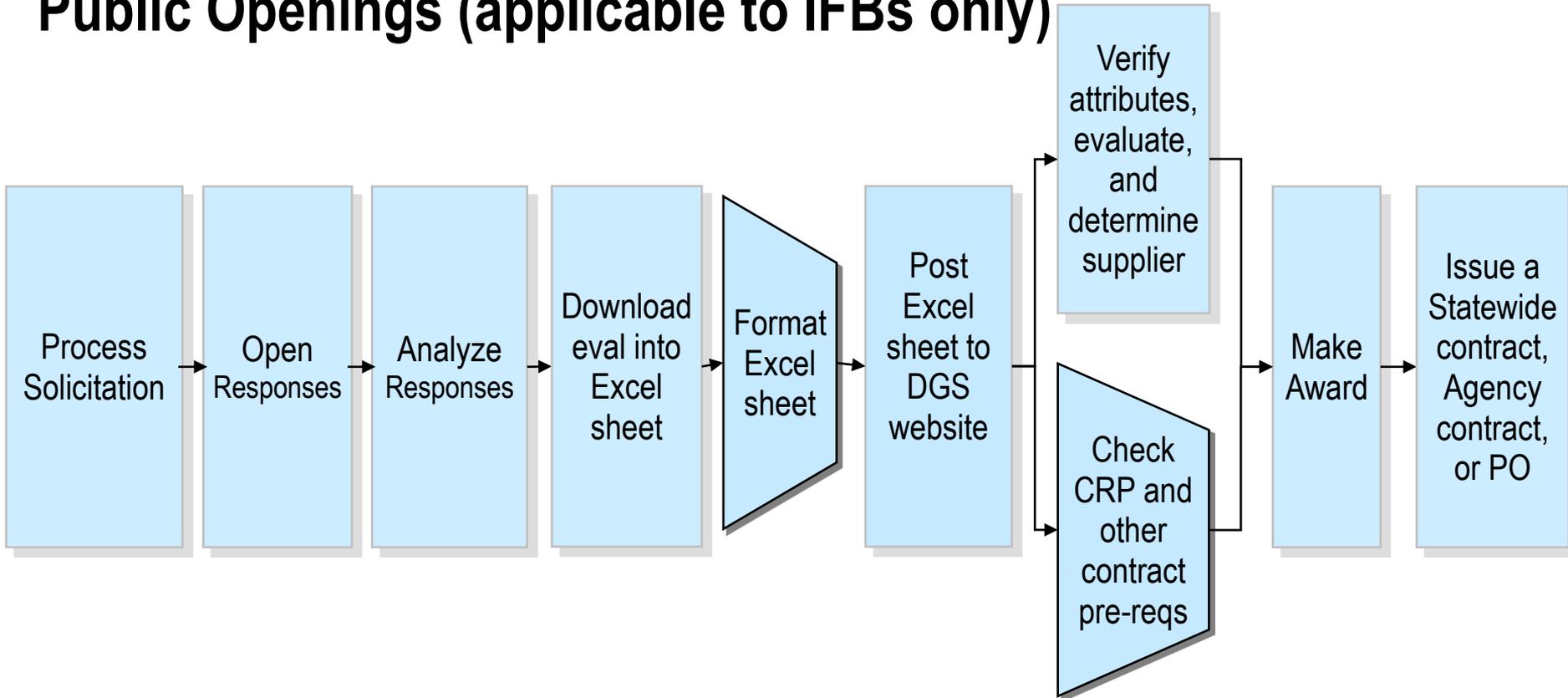
# Receive Responses Overview

## General Reminders (cont'd):

- For IT-ITQs, Instructions for Public Posting of All Awards for Solicitations Greater than \$50,000,
  - Agencies must post specific documents to the award section of eMarketplace; a list of documents that should be uploaded can be found on the ITQ Document Library Website
- Instructions on how to post this information can be found in the Help section on eMarketplace

# Receive Responses Overview

## Public Openings (applicable to IFBs only)



- Above responses contain only cost information
  - Submitted and opened electronically

# Receive Responses Overview

## General Reminders regarding RFP Evaluations

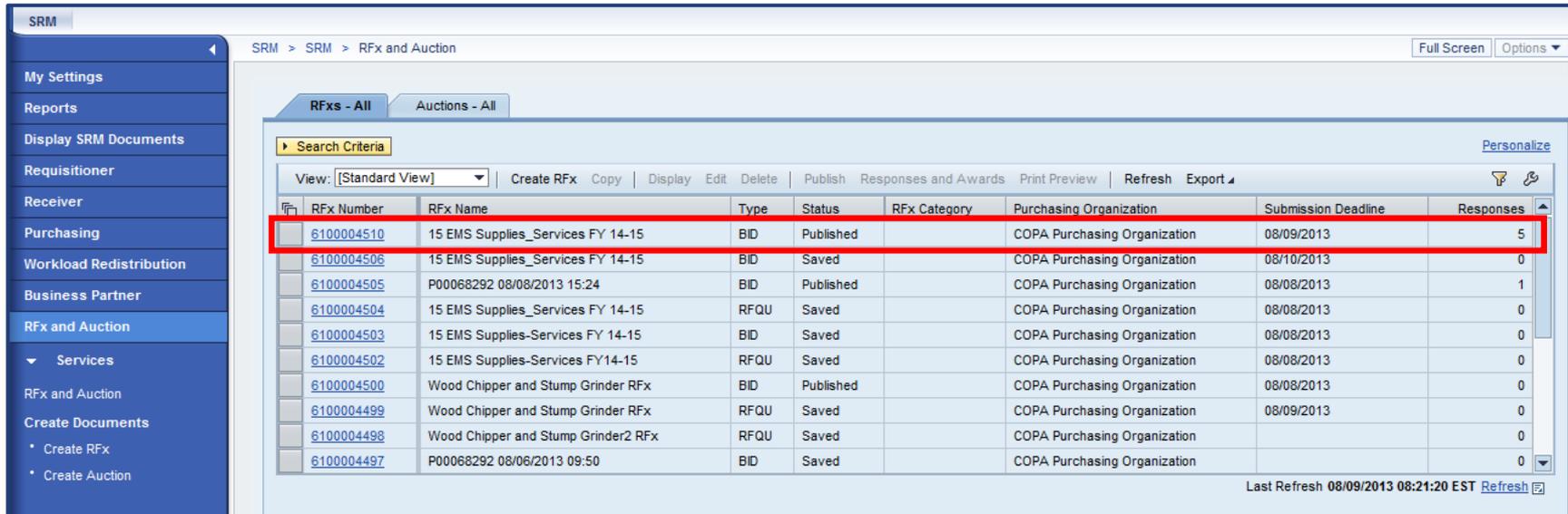
- Three items are submitted separately
  1. Technical (submitted on paper)
  2. Small Diverse Business (SDB) data (submitted on paper)
  3. Cost (submitted via SRM or on paper)

# Responses and Awards

## Overview of Responses and Awards

- Review and evaluate each supplier's response to the RFx
- Accept the response(s) for which a procurement award will be made
- Generate the award document(s)

# Locate Supplier Responses (RFx POWL)



SRM > SRM > RFx and Auction

RFxs - All | Auctions - All

Search Criteria

View: [Standard View] | Create RFx | Copy | Display | Edit | Delete | Publish | Responses and Awards | Print Preview | Refresh | Export

RFx Number	RFx Name	Type	Status	RFx Category	Purchasing Organization	Submission Deadline	Responses
6100004510	15 EMS Supplies_Services FY 14-15	BID	Published		COPA Purchasing Organization	08/09/2013	5
6100004506	15 EMS Supplies_Services FY 14-15	BID	Saved		COPA Purchasing Organization	08/10/2013	0
6100004505	P00068292 08/08/2013 15:24	BID	Published		COPA Purchasing Organization	08/08/2013	1
6100004504	15 EMS Supplies_Services FY 14-15	RFQU	Saved		COPA Purchasing Organization	08/08/2013	0
6100004503	15 EMS Supplies-Services FY 14-15	BID	Saved		COPA Purchasing Organization	08/08/2013	0
6100004502	15 EMS Supplies-Services FY14-15	RFQU	Saved		COPA Purchasing Organization	08/08/2013	0
6100004500	Wood Chipper and Stump Grinder RFx	BID	Published		COPA Purchasing Organization	08/08/2013	0
6100004499	Wood Chipper and Stump Grinder RFx	RFQU	Saved		COPA Purchasing Organization	08/09/2013	0
6100004498	Wood Chipper and Stump Grinder2 RFx	RFQU	Saved		COPA Purchasing Organization		0
6100004497	P00068292 08/06/2013 09:50	BID	Saved		COPA Purchasing Organization		0

Last Refresh 08/09/2013 08:21:20 EST Refresh

- Search for the solicitation in the POWL
- Display the solicitation to review

# Open the Responses (Responses and Award)

**Display RFX :**

**RFX Number** 6100027171   
**Smart Number** CKA RFX Demo 1-2-14   
**Type** Invitation For Bid   
**Status** Published   
**Created On** 01/02/2014 11:19:38   
**Created By** Cynthia Anderson  
**Time Zone** EST   
**Number of Suppliers** 4   
**Number of Items** 3   
**Version Number** 2   
**Version Type** Active Version   
**External Version Number** 1

**Identification**

**Smart Number:**   
 Smart Number is External  
**RFX Type:**   
**Bid Description:**   
**Publication Type:**

**Event Parameters**

**Detailed Price Information:**   
**Follow-On Document:**   
**Bidder Can Change RFX Responses:**   
**Allow Multiple RFX Responses for Each Company:**

**Scenario Award/Contract**

**Organization**

**Purchasing Organization:**   
**Purchasing Group:**  [Show Members](#)

- Select the RESPONSES AND AWARDS button

# Open the Responses (Responses Activity tab)

**Responses and Awards**

Print Preview | Close | Create Follow-on RFx | Convert to Auction | Export | Questions and Answers ( 0 )

Remaining Time 0 Days 00:00:00 | Smart Number CKA RFx Demo 1-2-14 | Type Invitation For Bid | Status Published | Number of Suppliers 4 | RFx Number [6100027171](#)

**Response Activity** | Response Comparison | Surrogate Bidding

Details | Response On Behalf | Contract Mass Update | Expand Rows

Response Number	Response Status	Company Name	Bidder Name	Response Version	Last Changed	Response on Behalf
<a href="#">6500068159</a>	Submitted	CHARLES S WINNER INC			01/02/2014	
<a href="#">6500068158</a>	Submitted	CENVEO CORPORATION			01/02/2014	
<a href="#">6500068157</a>	Submitted	SAF-T-GARD INTERNATIONAL INC			01/02/2014	
		PUBLIC ADVERTISING SUPPLIER				

- The Responses and Awards screen displays
  - The Response Activity tab shows an overview of the bid responses for the RFx
    - Response Number, Response Status, etc.

# Open the Responses – (Supplier Quotation)

**Responses and Awards**

Print Preview | Close | Create Follow-on RFx | Convert to Auction | Export | Questions and Answers ( 0 )

Remaining Time 0 Days 00:00:00 | Smart Number CKA RFx Demo 1-2-14 | Type Invitation For Bid | Status Published | Number of Suppliers 4 | RFx Number [6100027171](#)

Response Activity | Response Comparison | Surrogate Bidding

Details | Response On Behalf | Contract Mass Update | Expand Rows

Response Number	Response Status	Company Name	Bidder Name	Response Version	Last Changed	Response on Behalf
<a href="#">6500068159</a>	Submitted	CHARLES S WINNER INC			01/02/2014	
<a href="#">6500068158</a>	Submitted	CENVEO CORPORATION			01/02/2014	
<a href="#">6500068157</a>	Submitted	SAF-T-GARD INTERNATIONAL INC			01/02/2014	
		PUBLIC ADVERTISING SUPPLIER				

- Select a link to view the quotation document

# Open the Responses (Responses Comparison)

**Responses and Awards**

Print Preview | Refresh | Close | Export | Questions and Answers ( 0 )

Remaining Time 0 Days 00:00:00 | Smart Number CKA RFX Demo 1-2-14 | Type Invitation For Bid | Status Published | Number of Suppliers 4 | RFX Number [6100027171](#)

Response Activity | **Response Comparison** | Surrogate Bidding

Compare Selected Responses | Compare All Responses | Simple Comparison

Response Number	Response Version	Company Name	Bidder Name
<a href="#">6500068159</a>		CHARLES S WINNER INC	Richard Coyle
<a href="#">6500068157</a>		SAF-T-GARD INTERNATIONAL INC	Anya Vinogradova
<a href="#">6500068158</a>		CENVED CORPORATION	sara pruit

- The Response Comparison tab provides the ability to compare the submitted responses to one another

# Compare Responses (Compare all Responses)

**Responses and Awards**

Print Preview | Close | Export | Questions and Answers ( 0 )

Remaining Time 0 Days 00:00:00 | Smart Number CKA RFX Demo 1-2-14 | Type Invitation For Bid | Status Published | Number of Suppliers 4 | RFX Number [6100027171](#)

Response Activity | **Response Comparison** | Surrogate Bidding

Compare Selected Responses | **Compare All Responses** | Simple Comparison

Response Number	Response Version	Company Name	Bidder Name
<a href="#">6500068159</a>		CHARLES S WINNER INC	Richard Coyle
<a href="#">6500068157</a>		SAF-T-GARD INTERNATIONAL INC	Anya Vinogradova
<a href="#">6500068158</a>		CENVEO CORPORATION	sara pruit

Response Activity | **Response Comparison** | Surrogate Bidding

Details | Display Bidders | Comparison Date: 01/02/2014 | [Back to Response Comparison Main View](#) | [Download Response Comparison](#)

Item Details							Richard Coyle : CHARLES S WINNER INC : Submitted		Anya Vinogradova : SAF-T-GARD INTERNATIONAL INC : Submitted		sara pruit : CENVEO CORPORATION : Submitted						
Item Number	Internal Number	Item Description	Lot	Product ID	RFX Required Quantity	Delivery Date	Unit	Action	Action Description	Price	Action	Action Description	Price	Action	Action Description	Submitted Quantity	Price
• 1		All Items						<input type="checkbox"/>	Accept All	8,170.00	<input type="checkbox"/>	Accept All	8,093.00	<input type="checkbox"/>	Accept All		7,997.50
• 2		All Items						<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All		
• 3	1	<a href="#">EMT ALS Medical Cases</a>			20.000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,030.00	<input type="checkbox"/>	Accept	3,039.00	<input type="checkbox"/>	Accept		2,995.00
• 4	2	<a href="#">Rescue Blankets</a>			150.000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,900.00	<input type="checkbox"/>	Accept	3,825.00	<input type="checkbox"/>	Accept		3,787.50
• 5	3	<a href="#">Emergency Stretcher</a>			20.000	02/26/2014	EA	<input type="checkbox"/>	Accept	1,240.00	<input type="checkbox"/>	Accept	1,229.00	<input type="checkbox"/>	Accept		1,215.00

- Select the COMPARE ALL RESPONSES button to see an overview of the responses side by side

# Compare Responses (Item Details)

Response Activity			Response Comparison					Surrogate Bidding						
Details			Display Bidders			Comparison Date: 01/02/2014		Back to Response Comparison Main View		Download Response Comparison				
Item Details								Richard Coyle : CHARLES S WINNER INC : Submitted			Anya Vinogradova : SAF-T-GARD INTERNATIONAL INC : Submitted			sara pru
Item Number	Internal Number	Item Description	Lot	Product ID	Rfx Required Quantity	Delivery Date	Unit	Action	Action Description	Price	Action	Action Description	Price	Action
1		<a href="#">All Items</a>						<input type="checkbox"/>	Accept All	8,170.00	<input type="checkbox"/>	Accept All	8,093.00	<input type="checkbox"/>
2		<a href="#">All Items</a>						<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All		<input type="checkbox"/>
3	1	<a href="#">EMT ALS Medical Cases</a>			20.000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,030.00	<input type="checkbox"/>	Accept	3,039.00	<input type="checkbox"/>
4	2	<a href="#">Rescue Blankets</a>			150.000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,900.00	<input type="checkbox"/>	Accept	3,825.00	<input type="checkbox"/>
5	3	<a href="#">Emergency Stretcher</a>			20.000	02/26/2014	EA	<input type="checkbox"/>	Accept	1,240.00	<input type="checkbox"/>	Accept	1,229.00	<input type="checkbox"/>

Item Details							
Item Number	Internal Number	Item Description	Lot	Product ID	Rfx Required Quantity	Delivery Date	Unit
1		<a href="#">All Items</a>					
2		<a href="#">All Items</a>					
3	1	<a href="#">EMT ALS Medical Cases</a>			20.000	02/26/2014	EA
4	2	<a href="#">Rescue Blankets</a>			150.000	02/26/2014	EA
5	3	<a href="#">Emergency Stretcher</a>			20.000	02/26/2014	EA

- The Item Details area displays information pertaining to the solicitation line items

# Compare Responses – (Bid Responses Details)

Richard Coyle : CHARLES S WINNER INC : Submitted			Anya Vinogradova : SAF-T-GARD INTERNATIONAL INC : Submitted			sara prutt : CENVEO CORPORATION : Submitted				
Action	Action Description	Price	Action	Action Description	Price	Action	Action Description	Submitted Quantity	Price	Currency
<input type="checkbox"/>	Accept All	8,170.00	<input type="checkbox"/>	Accept All	8,093.00	<input type="checkbox"/>	Accept All		7,997.50	USD
<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All			
<input type="checkbox"/>	Accept	3,030.00	<input type="checkbox"/>	Accept	3,039.00	<input type="checkbox"/>	Accept		2,995.00	USD
<input type="checkbox"/>	Accept	3,900.00	<input type="checkbox"/>	Accept	3,825.00	<input type="checkbox"/>	Accept		3,787.50	USD
<input type="checkbox"/>	Accept	1,240.00	<input type="checkbox"/>	Accept	1,229.00	<input type="checkbox"/>	Accept		1,215.00	USD



Anya Vinogradova : SAF-T-GARD INTERNATIONAL INC : Submitted		
Action	Action Description	Price
<input type="checkbox"/>	Accept All	8,093.00
<input type="checkbox"/>	Reject All	
<input type="checkbox"/>	Accept	3,039.00
<input type="checkbox"/>	Accept	3,825.00
<input type="checkbox"/>	Accept	1,229.00

- The bid response details for each bidder are displayed side by side

# Compare Responses

**Responses and Awards**

[Edit](#) [Print Preview](#) [Close](#) [Export](#) [Questions and Answers \(0\)](#)

Remaining Time 0 Days 00:00:00    Smart Number CKA RFX Demo 1-2-14    Type Invitation For Bid    Status Published    Number of Suppliers 4    RFX Number [6100027171](#)

[Main View](#)    [Download Response Comparison](#)

[Expand All](#) [Collapse All](#) [Filter Settings](#)

		Richard Coyle : CHARLES S WINNER INC : Submitted			Anya Vinogradova : SAF-T-GARD INTERNATIONAL INC : Submitted			sara pruit : CENVEO CORPORATION : Submitted						
Red Quantity	Delivery Date	Unit	Action	Action Description	Price	Action	Action Description	Price	Action	Action Description	Submitted Quantity	Price	Currency	Weighted Score
			<input type="checkbox"/>	Accept All	8,170.00	<input type="checkbox"/>	Accept All	8,093.00	<input type="checkbox"/>	Accept All		7,997.50	USD	
			<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All				
20.000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,030.00	<input type="checkbox"/>	Accept	3,039.00	<input type="checkbox"/>	Accept		2,995.00	USD	0.00
150.000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,900.00	<input type="checkbox"/>	Accept	3,825.00	<input type="checkbox"/>	Accept		3,787.50	USD	0.00
20.000	02/26/2014	EA	<input type="checkbox"/>	Accept	1,240.00	<input type="checkbox"/>	Accept	1,229.00	<input type="checkbox"/>	Accept		1,215.00	USD	0.00

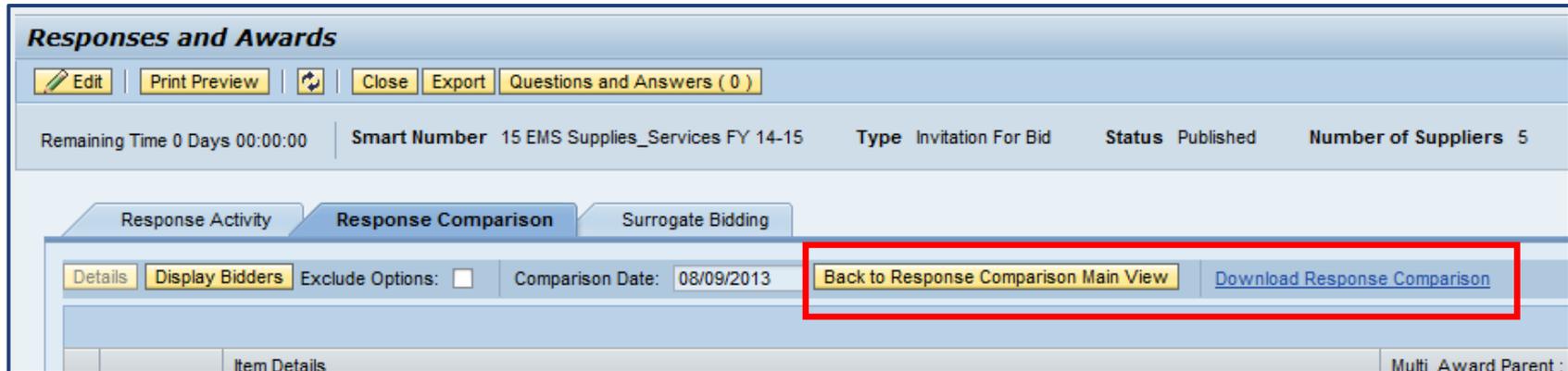
- Checkboxes are present on each item, and allow you to perform one of three (3) actions after selecting the EDIT button

# Compare Responses – Accept/Reject

sara pruit : CENVEO CORPORATION : Submitted				
Action	Action Description	Submitted Quantity	Price	Currency
<input checked="" type="checkbox"/>	Accept All		7,997.50	USD
<input type="checkbox"/>	Reject All			
<input checked="" type="checkbox"/>	Accept		2,995.00	USD
<input checked="" type="checkbox"/>	Accept		3,787.50	USD
<input checked="" type="checkbox"/>	Accept		1,215.00	USD

- Use *Accept All* to accept all of the line item bids for the supplier
- Use *Reject All* to reject all of the line item bids for the supplier (this should only be used if the supplier is found to be non-responsive or non-responsible)
- Use *Accept* to accept bids per line item for a supplier

# Compare Responses – (Bid Tabulation)



**Responses and Awards**

Edit | Print Preview | Close | Export | Questions and Answers ( 0 )

Remaining Time 0 Days 00:00:00 | Smart Number 15 EMS Supplies\_Services FY 14-15 | Type Invitation For Bid | Status Published | Number of Suppliers 5

Response Activity | **Response Comparison** | Surrogate Bidding

Details | Display Bidders | Exclude Options:  | Comparison Date: 08/09/2013 | **Back to Response Comparison Main View** | [Download Response Comparison](#)

Item Details | Multi Award Parent :

- Select the **BACK TO RESPONSE COMPARISON MAIN VIEW** to return to the previous screen
- Select the *Download Response Comparison* link to download the information into the Excel bid tabulation format

# Compare Responses – (Display Bidders)

**Responses and Awards**

Remaining Time 0 Days 00:00:00   
 Smart Number 15 EMS Supplies\_Services FY 14-15   
 Type Invitation For Bid   
 Status Published   
 Num

Response Activity   
**Response Comparison**   
 Surrogate Bidding

Exclude Options:    
 Comparison Date: 08/09/2013   

Item Details

**Display Bidders**

Company Name	Contact
<input type="checkbox"/> MULTI-AWARD PARENT	Multi_Award Parent
<input type="checkbox"/> EDWIN L HEIM CO	EDWIN11 EDWIN11
<input checked="" type="checkbox"/> SECCO	Secco11 Secco11
<input checked="" type="checkbox"/> PENNSYLVANIA INDUSTRIES FOR THE	PIBH Bidder
<input checked="" type="checkbox"/> SHAMROCK SPECIALTY SERVICES	Shamrock11 Shamrock11

- Use the checkboxes to select only those responses to be displayed at one time
  - All responses remain available for viewing at another time
- SAVE AND CLOSE to continue

# Compare Responses – (Line Item Detail)

Response Activity    Response Comparison    Surrogate Bidding

Details    **Display Bidders**    Exclude Options:     Comparison Date: 08/09/2013    [Back to Response Comparison Main View](#)    [Download Response Comparison](#)

Item Number	Internal Number	Item Description	Lot	Product ID	Rfx Required Quantity	Delivery Date	Unit	Action	Action Description	Submitted Quantity	Price	Currency	Weighted Score	Action	Action Description
1		<a href="#">All Items</a>						<input type="checkbox"/>	Accept All		47,390.00	USD		<input type="checkbox"/>	Accept All
2		<a href="#">All Items</a>						<input type="checkbox"/>	Reject All					<input type="checkbox"/>	Reject All
3	1	EMS ALS Medical Cases			75.000	10/02/2013	EA	<input type="checkbox"/>	Accept		11,621.25	USD	0.00	<input type="checkbox"/>	Accept
4	2	Rescue Blankets			225.000	10/02/2013	EA	<input type="checkbox"/>	Accept		5,811.75	USD	0.00	<input type="checkbox"/>	Accept
5	3	Emergency Stretcher			150.000	10/02/2013	EA	<input type="checkbox"/>	Accept		9,297.00	USD	0.00	<input type="checkbox"/>	Accept
6	4	Emergency Hospital Services			86.000	10/02/2013	H	<input type="checkbox"/>	Accept		20,660.00	USD	0.00	<input type="checkbox"/>	Accept

**Item Details for Analysis: EMS ALS Medical Cases**

	Multi_Award Parent : MULTI-AWARD PARENT : Submitted	EDWIN11 EDWIN11 : EDWIN L HEIM CO : Submitted	Secco
Net price	154.95 USD Per 1.000 EA	150.75 USD Per 1.000 EA	150.90
Net value	11,621.25 USD	11,306.25 USD	11,317
Bids w. Variants	No	No	No
Additional Items	No	No	No

- Select a line item to view the details of the responses to that line item by each supplier
  - The details of the line item response appear below the overview area

# Accept a Response

**Responses and Awards**

Print Preview | Close | Create Follow-on RFX | Convert to Auction | Export | Questions and Answers ( 0 )

Remaining Time 0 Days 00:00:00 | Smart Number 15 EMS Supplies\_Services FY 14-15 | Type Invitation For Bid | Status Published | Number of Suppliers 5 | RFX Number 6100004510

Response Activity | Response Comparison | Surrogate Bidding

Details | Response On Behalf | Return Response | Contract Mass Update | Expand Rows

Response Number	Response Status	Company Name	Bidder Name	Intent	Response Version	Last Changed	Response on Behalf
<a href="#">6500003631</a>	Submitted	EDWIN L HEIM CO		◇		08/09/2013	
<a href="#">6500003632</a>	Submitted	SECCO		◇		08/09/2013	
<a href="#">6500003630</a>	Submitted	PENNSYLVANIA INDUSTRIES FOR THE		◇		08/09/2013	
<a href="#">6500003633</a>	Submitted	SHAMROCK SPECIALTY SERVICES		◇		08/09/2013	
<a href="#">6500003634</a>	Submitted	MULTI-AWARD PARENT		◇		08/09/2013	

- You may accept or reject a supplier's quotation while viewing it
  - Select the link containing the supplier's quotation number
- You can create a Follow-on RFX (BAFO) [see slide 146]

# Accept a Response

**Edit Rfx Response:**

Rfx Response Number 6500003633    Rfx Name 15 EMS Supplies\_Services FY 14-15    Status Submitted    Supplier Name SHAMROCK SPECIALTY SERVICES  
 Target Value 0.00 USD    Rfx Number [6100004510](#)

<p><b>Bidder Contact Information</b></p> <p>Supplier Name: SHAMROCK SPECIALTY SERVICES</p> <p>Contact Person Name: Shamrock11 Shamrock11</p> <p>E-Mail: Shamrock11@state.pa.us</p> <p>Fax:</p> <p>Phone: 1231231233</p>	<p><b>Rfx Response Information</b></p> <p>Last Changed On: 08/09/2013 18:38:43 EST</p> <p>Last Changed By: Angela Eshleman</p> <p>Creation Date: 08/09/2013 08:16:10 EST</p> <p>Created By: Mr. Shamrock11 Shamrock11</p>
<p><b>Event Parameters</b></p> <p>Process Type: <input type="text" value="QUOT"/></p> <p>Validity Period: <input type="text"/> - <input type="text"/></p> <p>Currency: <input type="text" value="United States Dollar"/></p> <p>Detailed Price Information: <input type="text" value="Price with Conditions"/></p> <p>Follow-On Document: <input type="text" value="Contract"/></p>	<p><b>Status and Statistics</b></p> <p>Created On: <input type="text" value="08/09/2013 08:16:10 EST"/></p> <p>Created By: <input type="text" value="Mr. Shamrock11 Shamrock11"/></p> <p>Last Processed On: <input type="text" value="08/09/2013 18:38:43 EST"/></p> <p>Last Processed By: <input type="text" value="Angela Eshleman"/></p>

- Select the ACCEPT or REJECT button as applicable

# Accept a Response – Make Award

**Responses and Awards**

Print Preview Close Display **Award** Export Questions and Answers ( 0 )

Remaining Time 0 Days 00:00:00 Smart Number 15 EMS Supplies\_Services FY 14-15 Type Invitation For Bid Status Published Number of Suppliers 5 RFx Number [6100004510](#)

Expand All Collapse All Filter Settings

co11 : SECCO : Submitted					PIBH Bidder : PENNSYLVANIA INDUSTRIES FOR THE : Submitted					Shamrock11 Shamrock11 : SHAMROCK SPECIALTY SERVICES : Submitted						
Item Description	Submitted Quantity	Price	Currency	Weighted Score	Action	Action Description	Submitted Quantity	Price	Currency	Weighted Score	Action	Action Description	Submitted Quantity	Price	Currency	Weighted Score
apt All		46,150.25	USD		<input type="checkbox"/>	Accept All		46,333.75	USD		<input checked="" type="checkbox"/>	Accept All		45,416.25	USD	
ct All					<input type="checkbox"/>	Reject All					<input type="checkbox"/>	Reject All				
apt		11,317.50	USD	0.00	<input type="checkbox"/>	Accept		11,362.50	USD	0.00	<input checked="" type="checkbox"/>	Accept		11,137.50	USD	0.00
apt		5,658.75	USD	0.00	<input type="checkbox"/>	Accept		5,681.25	USD	0.00	<input checked="" type="checkbox"/>	Accept		5,568.75	USD	0.00
apt		9,054.00	USD	0.00	<input type="checkbox"/>	Accept		9,090.00	USD	0.00	<input checked="" type="checkbox"/>	Accept		8,910.00	USD	0.00
apt		20,120.00	USD	0.00	<input type="checkbox"/>	Accept		20,200.00	USD	0.00	<input checked="" type="checkbox"/>	Accept		19,800.00	USD	0.00

- You may also accept or reject a supplier's quotation while comparing responses
  - Select the checkboxes for the supplier's applicable line item(s)
- Select the AWARD button

# Accepted and Rejected Responses

- An accepted response does not need to be approved at the “accept” stage
  - Workflow is behind and ahead of the acceptance
    - Solicitation was approved
    - Follow-on documents will be approved
- Remember that there is a difference between **rejecting** a response and **not accepting** a response
  - A response that is not accepted requires no action
    - Do **not** select the REJECT button or the ACCEPT button
    - The status must continue to display in the portal as “Submitted”
  - Do not list the reason for rejection anywhere except on internal notes areas

# Reasons to Reject a Response

## **There are 7 reasons to reject a response**

1. Documents are not signed (paper submissions only)
2. Response does not meet specifications
3. Supplier conditioned the response
4. Security was not offered (if required)
5. Supplier did not respond to all items (for Group Award only)
6. Supplier did not respond to other mandatory requirements (considered “not responsive”)
7. Response was submitted late (for paper responses)

# Appeals and Protests

- Awards are posted on eMarketplace, and suppliers are responsible for checking that site
- A supplier has seven (7) days to protest an award after they could reasonably be expected to be aware of the award
  - For more information on protests go to LSO, Web-based Training and take the Protest Training Course

# Best and Final Offers (BAFO)

- Select the CREATE FOLLOW-ON RFx button to start the process
  - All suppliers who responded to the original solicitation will be listed in the newly created document (copy of the original)
    - Be certain to delete all suppliers who will not be participating in the BAFO
    - Be certain that you set the Publication Type to “Restricted”, or it will be visible to anyone in the PA Supplier Portal

# Accept a Response

**Responses and Awards**

[Edit](#) | [Print Preview](#) | [Close](#) | [Export](#) | [Questions and Answers \( 0 \)](#)

⚠ RFX response 6500003630 has not yet been awarded as no decision has been made  
 ⚠ RFX response 6500003631 has not yet been awarded as no decision has been made  
 ⚠ RFX response 6500003632 has not yet been awarded as no decision has been made  
 ⚠ RFX response 6500003634 has not yet been awarded as no decision has been made  
 ✓ RFX response 6500003633 (15 EMS Supplies\_Services FY 14-15) accepted

Remaining Time 0 Days 00:00:00 | **Smart Number** 15 EMS Supplies\_Services FY 14-15 | **Type** Invitation For Bid | **Status** Published | **Number of Suppliers** 5 | **RFX Number** [6100004510](#)

[Expand All](#) [Collapse All](#) [Filter Settings](#)

co11 : SECCO : Submitted					PIBH Bidder : PENNSYLVANIA INDUSTRIES FOR THE : Submitted					Shamrock11 Shamrock11 : SHAMROCK SPECIALTY SERVICES : Awaiting Approval						
Item Description	Submitted Quantity	Price	Currency	Weighted Score	Action	Action Description	Submitted Quantity	Price	Currency	Weighted Score	Action	Action Description	Submitted Quantity	Price	Currency	Weighted Score
Accept All		46,150.25	USD		<input type="checkbox"/>	Accept All		46,333.75	USD		<input checked="" type="checkbox"/>	Accept All		45,416.25	USD	
Reject All					<input type="checkbox"/>	Reject All					<input type="checkbox"/>	Reject All				
Accept		11,317.50	USD	0.00	<input type="checkbox"/>	Accept		11,362.50	USD	0.00	<input checked="" type="checkbox"/>	Accept		11,137.50	USD	0.00
Accept		5,658.75	USD	0.00	<input type="checkbox"/>	Accept		5,681.25	USD	0.00	<input checked="" type="checkbox"/>	Accept		5,568.75	USD	0.00
Accept		9,054.00	USD	0.00	<input type="checkbox"/>	Accept		9,090.00	USD	0.00	<input checked="" type="checkbox"/>	Accept		8,910.00	USD	0.00
Accept		20,120.00	USD	0.00	<input type="checkbox"/>	Accept		20,200.00	USD	0.00	<input checked="" type="checkbox"/>	Accept		19,800.00	USD	0.00

- Messages display indicating that the response was accepted
- The status of the supplier's quotation changes to "Awaiting Approval"

# Accept a Response

**Responses and Awards**

-  RfX response 6500003630 has not yet been awarded as no decision has been made
-  RfX response 6500003631 has not yet been awarded as no decision has been made
-  RfX response 6500003632 has not yet been awarded as no decision has been made
-  RfX response 6500003634 has not yet been awarded as no decision has been made
-  RfX response 6500003633 (15 EMS Supplies\_Services FY 14-15) accepted

- These messages and/or status changes do not mean that the acceptance must go through approval workflow

sara pruit : CENVEO CORPORATION : Awaiting Approval

Action	Action Description	Submitted Quantity	Price	Currency
<input checked="" type="checkbox"/>	Accept All		7,997.50	USD
<input type="checkbox"/>	Reject All			
<input checked="" type="checkbox"/>	Accept		2,995.00	USD
<input checked="" type="checkbox"/>	Accept		3,787.50	USD
<input checked="" type="checkbox"/>	Accept		1,215.00	USD

**Response Activity**    Response Comparison    Surrogate Bidding

Response Number	Response Status	Company Name
<a href="#">6500068159</a>	Submitted	CHARLES S WINNER INC
<a href="#">6500068158</a>	Awaiting Approval	CENVEO CORPORATION
<a href="#">6500068157</a>	Submitted	SAF-T-GARD INTERNATIONAL INC
		PUBLIC ADVERTISING SUPPLIER

# Create and Award

**Responses and Awards**

Print Preview | Refresh | Close | Create Follow-on RFX | Convert to Auction | Export | Questions and Answers ( 0 )

Click 'Refresh' to view the latest information

Remaining Time 0 Days 00:00:00 | Smart Number CKA RFX Demo 1-2-14 | Type Invitation For Bid | Status Published | Number of Suppliers 4 | RFX Number [6100027171](#)

Response Activity | Response Comparison | Surrogate Bidding

Details | Response On Behalf | Contract Mass Update | Expand Rows

Response Number	Response Status	Company Name	Bidder Name	Response Version	Last Changed	Response on Behalf
<a href="#">6500068159</a>	Submitted	CHARLES S WINNER INC			01/02/2014	
<a href="#">6500068158</a>	Awaiting Approval	CENVEO CORPORATION			01/02/2014	
<a href="#">6500068157</a>	Submitted	SAF-T-GARD INTERNATIONAL INC			01/02/2014	
		PUBLIC ADVERTISING SUPPLIER				

- A system message displays instructing you to select the REFRESH button. This will change the status in the supplier's Response Status of the Response Activity tab to "Accepted"
- Select the Response Number of the "Accepted" supplier to create the award

# Create and Award

**Display RFX Response:**

RFX Response Number 6500068158    RFX Name CKA RFX Demo 1-2-14    Status Accepted    Supplier Name CENVEO CORPORATION    Target Value 0.00 USD  
 RFX Number [6100027171](#)

▼ Basic Data

<p><b>Bidder Contact Information</b></p> <p>Supplier Name: CENVEO CORPORATION</p> <p>Contact Person Name: sara pruit</p> <p>E-Mail: sara.pruitt@cenveo.com</p> <p>Fax: 812-981-4974</p> <p>Phone: 812-981-4999</p>	<p><b>RFX Response Information</b></p> <p>Last Changed On: 01/02/2014 14:15:21 EST</p> <p>Last Changed By: Cynthia Anderson</p> <p>Creation Date: 01/02/2014 13:13:01 EST</p> <p>Created By: Ms. sara pruit</p>
--	---

<p><b>Event Parameters</b></p> <p>Process Type: QUOT</p> <p>Validity Period: -</p> <p>Currency: United States Dollar</p> <p>Detailed Price Information: Price with Conditions</p> <p>Follow-On Document: Contract</p> <p>Target Value of RFX in Original Currency: 11,050.00 USD</p> <p>Target Value of RFX in Selected Currency: 11,050.00 USD</p> <p>Target Value of RFX Response: 0.00 USD</p> <p>Net Value of Header Items: 0.00 USD</p>	<p><b>Status and Statistics</b></p> <p>Created On: 01/02/2014 13:13:01 EST</p> <p>Created By: Ms. sara pruit</p> <p>Last Processed On: 01/02/2014 14:15:21 EST</p> <p>Last Processed By: Cynthia Anderson</p>
--	---

- Select the CREATE CONTRACT button to generate the follow-on procurement document

# Create and Award

**Display RFX Response:**

RFX Response Number 6500068158    RFX Name CKA RFX Demo 1-2-14    Status Accepted    Supplier Name CENVEO CORPORATION    Target Value 0.00 USD  
 RFX Number [6100027171](#)

▼ Basic Data

<b>Bidder Contact Information</b>		<b>RFX Response Information</b>	
Supplier Name: CENVEO CORPORATION		Last Changed On: 01/02/2014 14:15:21 EST	
Contact Person Name: sara pruit		Last Changed By: Cynthia Anderson	
E-Mail: sara.pruitt@cenvéo.com		Creation Date: 01/02/2014 13:13:01 EST	
Fax: 812-981-4974		Created By: Ms. sara pruit	
Phone: 812-981-4999			

<b>Event Parameters</b>	<b>Status and Statistics</b>
Process Type: QUOT	Created On: 01/02/2014 13:13:01 EST
Validity Period: -	Created By: Ms. sara pruit
Currency: United States Dollar	Last Processed On: 01/02/2014 14:15:21 EST
Detailed Price Information: Price with Conditions	Last Processed By: Cynthia Anderson
Follow-On Document: Contract	
Target Value of RFX in Original Currency: 11,050.00 USD	
Target Value of RFX in Selected Currency: 11,050.00 USD	
Target Value of RFX Response: 0.00 USD	
Net Value of Header Items: 0.00 USD	

- *Important Note: If you have accepted the response by mistake, you may select the UNDO ACCEPT button to reverse the acceptance*

# Create an Award

**Display RFX Response:**

Print Preview | Close | Export | Create Contract | Publish To Catalog | Undo Accept

RFX Response Number 6500068158 RFX Name CKA RFX Demo 1-2-14 Status Accepted Supplier Name CENVEO CORPORATION Target Value 0.00 USD  
RFX Number 6100027171

RFX Information | Items | Notes and Attachments | Conditions | Approval | Tracking

General Data | Notes and Attachments | Questions

▼ Basic Data

**Bidder Contact Information**  
Supplier Name: CENVEO CORPORATION  
Contact Person Name: sara pruit  
E-Mail: sara.pruitt@cenvco.com  
Fax: 812-981-4974  
Phone: 812-981-4999

**RFX Response Information**  
Last Changed On: 01/02/2014 14:15:21 EST  
Last Changed By: Cynthia Anderson  
Creation Date: 01/02/2014 13:13:01 EST  
Ms. sara pruit

**Event Parameters**  
Process Type: QUOT  
Validity Period: -  
Currency: United States Dollar  
Detailed Price Information: Price with Conditions  
Follow-On Document: Contract  
Target Value of RFX in Original Currency: 11,050.00  
Target Value of RFX in Selected Currency: 11,050.00  
Target Value of RFX Response: 0.00  
Net Value of Header Items: 0.00

**Organization**  
Responsible Purchasing Organization: O 50008882 COPA  
Responsible Purchasing Group: O 50008932 DGS Central Purchase Purchasing Group

**Create Contract**

Select from the following transaction types:

Transaction Type	Description
ZASS	Agy Sole Source Svc
ZAWC	Agency Contract
ZITQ	ITQ DGS Contract
ZSDC	SW DirRsl Hrchy Sply
ZSDS	SW DirRsl Hrchy Serv

Create Contract | Cancel

**Status and Statistics**  
Created On: 01/02/2014 13:13:01 EST  
Created By: Ms. sara pruit  
Last Processed On: 01/02/2014 14:15:21 EST  
Last Processed By: Cynthia Anderson

- The contract transaction types display for selection

# Create an Award

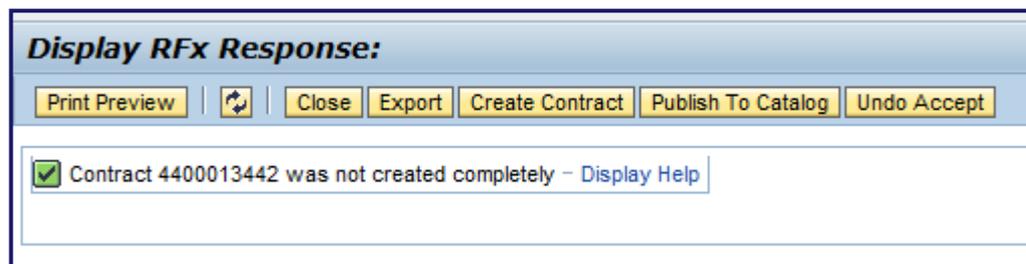


**Create Contract**

Select from the following transaction types:

Transaction Type	Description
ZASS	Agy Sole Source Svc
ZAWC	Agency Contract
ZITQ	ITQ DGS Contract
ZSDC	SW DirRsl Hrchy Sply
ZSDS	SW DirRsl Hrchy Serv

- Choose the applicable transaction type
- Select the CREATE CONTRACT button



**Display RFX Response:**

Contract 4400013442 was not created completely - [Display Help](#)

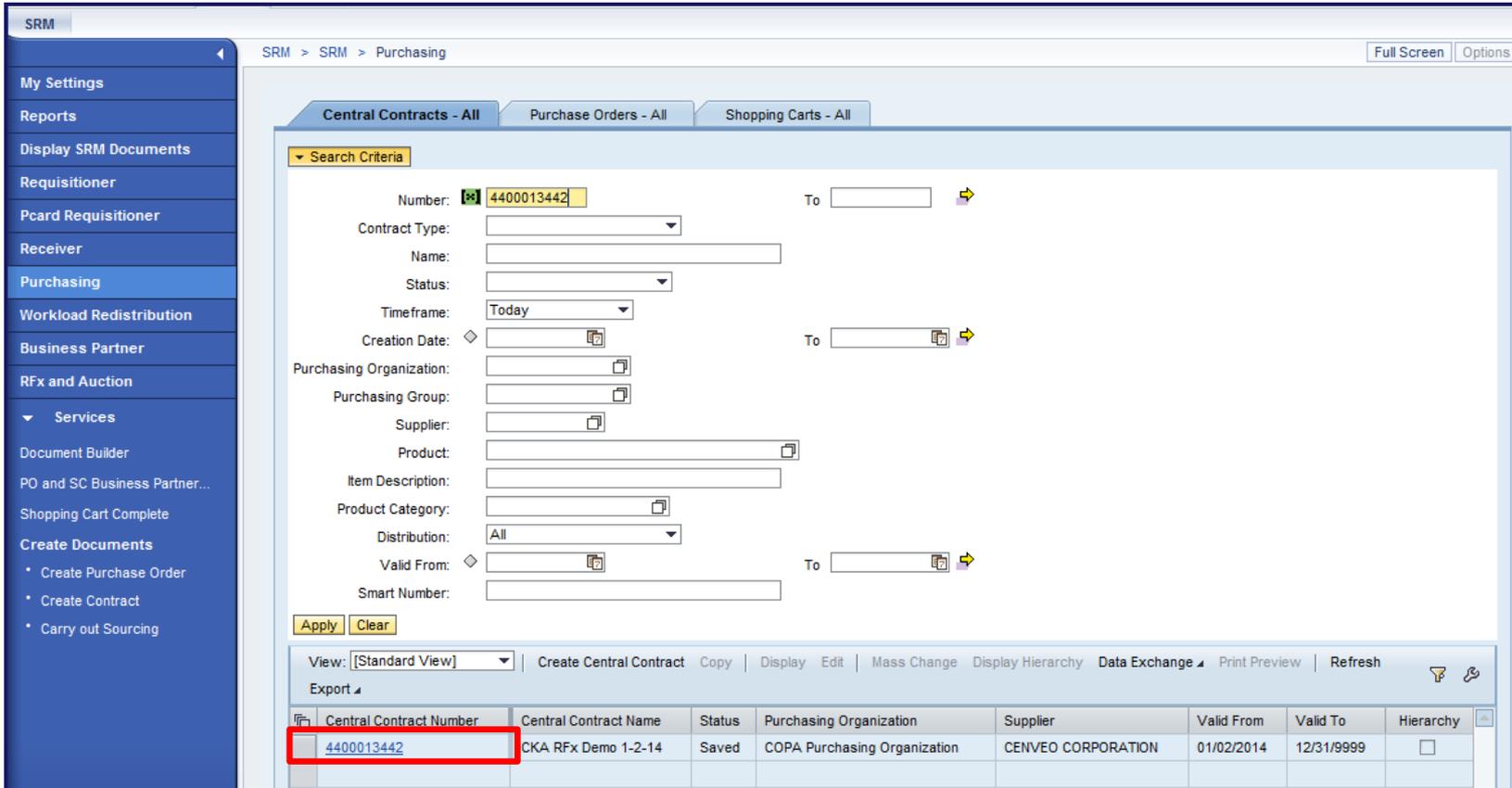
- A message displays with the draft contract number

# Editing the Contract

# Editing the Contract

- Review the Contract
  - Verify that all of the data from the supplier's response is complete and accurate
  - If applicable, make any edits to the information
- On each tab, enter any necessary data into the appropriate fields, and/or attach documents
- Release the Contract for workflow approval

# Locate the Contract for Editing (POWL)



SRM > SRM > Purchasing

Full Screen Options

Central Contracts - All Purchase Orders - All Shopping Carts - All

Search Criteria

Number: 4400013442 To

Contract Type:

Name:

Status:

Timeframe: Today

Creation Date: To

Purchasing Organization:

Purchasing Group:

Supplier:

Product:

Item Description:

Product Category:

Distribution: All

Valid From: To

Smart Number:

Apply Clear

View: [Standard View] Create Central Contract Copy | Display Edit | Mass Change Display Hierarchy Data Exchange Print Preview Refresh

Export

Central Contract Number	Central Contract Name	Status	Purchasing Organization	Supplier	Valid From	Valid To	Hierarchy
4400013442	CKA RFX Demo 1-2-14	Saved	COPA Purchasing Organization	CENVEO CORPORATION	01/02/2014	12/31/9999	<input type="checkbox"/>

- Locate and select the draft Contract in the Purchasing POWL

# Editing the Contract

**Display Agency Contract 4400013442**

Close Release **Edit** Copy Check Negotiate Print Preview Related Links

Contract Number 4400013442 Smart Number CKA RFx Demo 1-2-14 Contract Type Agency Contract Status Saved Supplier 171430 CENVEO CORPORATION  
Contract Owner 703389 Cynthia Anderson

Overview Header Items Notes and Attachments Conditions Approval Tracking

**General Header Data**

Contract Number: 4400013442 Contract Owner: 703389 Cynthia Anderson  
Smart Number: CKA RFx Demo 1-2-14 Target Value/ Currency: 0.00 USD  
 Smart Number is External Release Value: 0.00 USD  
Contract Description: Basic Contract:   
Supplier: \* 171430 CENVEO CORPORATION  
Valid From / To: \* 01/02/2014 - 12/31/9999  
Purchasing Organization: \* COPA Purchasing Organization  
Purchasing Group: \* DGS Central Purchase Purchasing Group [Show Members](#)

▼ Items

Details Select Add Item Exercise Option Copy Paste Duplicate Delete Filter Settings

Line Number	Item Category	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Price Per	Price Unit	Reference Item Number
1	Normal	1		EMT ALS Medical Cases	42171915	20.000		EA	2,995.00	149.75	USD	1	EA	0
2	Normal	2		Rescue Blankets	42171701	150.000		EA	3,787.50	25.25	USD	1	EA	0
3	Normal	3		Emergency Stretcher	42171611	20.000		EA	1,215.00	60.75	USD	1	EA	0

- The draft Contract displays
- Select the EDIT button to begin making changes

# Overview Tab

**Change Agency Contract 4400006486**

Read Only Close Release Save Check Print Preview Delete Related Links

Contract Number 4400006486 Smart Number 15 EMS Supplies\_Services FY 14-15 Contract Type Agency Contract Status Saved Supplier 210251 SHAMROCK SPECIALTY SERVICES  
Contract Owner 337344 Angela Eshleman

Overview Header Items Notes and Attachments Conditions Approval Tracking

**General Header Data**

Contract Number: 4400006486 Contract Owner: 337344 Angela Eshleman  
Smart Number: 15 EMS Supplies\_Services FY Target Value/ Currency: 45,416.25 USD  
 Smart Number is External Release Value: 0.00 USD  
Contract Description: 15 EMS Supplies\_Services FY 14-15 Basic Contract:   
Supplier: \* 210251 SHAMROCK SPECIALTY SERVICES  
Valid From / To: \* 07/01/2014 - 06/30/2015  
Purchasing Organization: \* COPA Purchasing Organization  
Purchasing Group: \* XB1 - DGS Angela L Eshleman Show Members

▼ Items

Details Select Add Item Exercise Option Copy Paste Duplicate Delete Filter Settings

Line Number	Item Category	Item Number	Product ID	Description	Product Category	Target Quantity	Unit	Target Value	Price	Currency	Price Per	Price Unit
1	Normal	1		EMS ALS Medical Cases	42171912	75.000	EA	11,137.50	148.50	USD	1	EA
2	Normal	2		Rescue Blankets	42171701	225.000	EA	5,568.75	24.75	USD	1	EA
3	Normal	3		Emergency Stretcher	42171611	150.000	EA	8,910.00	59.40	USD	1	EA
4	Normal	4		Emergency Hospital Services	85101501	80.000	H	19,800.00	247.50	USD	1	H
	Normal					0.000		0.00	0.00	USD	0	
	Normal					0.000		0.00	0.00	USD	0	
	Normal					0.000		0.00	0.00	USD	0	

- The Overview tab contains high-level information about the Contract
  - Name the Contract; Enter a Validity Period and Target Value/Currency
  - Edits and/or additions may be made on this tab, or on the Header tab

# Overview Tab

**Change Agency Contract 4400006486**

Read Only | Close | Release | Save | Check | Print Preview | Delete | Related Links ▾

❗ Workflow Process not defined

❗ Please enter header target value.

❗ Item 1 target value is greater than contract header target value.

❗ Contract creation <= 10K not allowed

Contract Number 4400006486    Smart Number 15 EMS Supplies\_Services FY 14-15    Contract Type Agency Contract    Status Saved    Supplier [210251 SHAMRO](#)  
Contract Owner [337344 Angela Eshleman](#)

Overview | Header | Items | Notes and Attachments | Conditions | Approval | Tracking

**General Header Data**

Contract Number:     Contract Owner:  [Angela Eshleman](#)  
Smart Number:     Target Value/Currency:  USD

- Error messages pertaining to the draft contract's incomplete fields may display
  - Review and address as required

# Header Tab - Basic Data Sub-tab

**Change SW Regular Contract 4400014332**

Read Only | Close | Release | Save | Check | Print Preview | Delete | Related Links

**Small Business Reserve Indicator is required**

Contract Number: 4400014332 | Smart Number: Test IFB for new validations screenshots | Contract Type: SW Regular Contract | Status: Saved | Supplier: 416368 PI DEVELOPMENT LLC | Contract Owner: 703389 Cynthia Anderson

Overview | **Header** | Items | Notes and Attachments | Conditions | Approval | Tracking

Basic Data | Condition | Hierarchy | Notes and Attachments | Output | Document Totals | Account Assignment | Payment | User-Specified Status

**Basic**

**Identification**

Smart Number:   Smart Number is External

Contract Number:  Contract Type:  Basic Contract:

**Currency, Values and Pricing**

\* Currency:  Target Value:  USD Alert Release Value:  % Release Value:  USD

**Organization**

\* Purchasing Organization:  \* Purchasing Group:  [Show Members](#)

**Service and Delivery**

Under/ Overdelivery Tolerance:  % /  %

**Status and Statistics**

Created On:  Created By:  Closeout Status:

**Dates**

\* Valid From / To:  -  Alert Expiration:  Day(s)

Contract Name:

Small Business Reserve:

**Partner**

Function	Exclude	Number	Name	Phone Number
• Vendor	<input type="checkbox"/>	416368	<a href="#">PI DEVELOPMENT LLC</a>	803-446-8067
• Goods Recipient	<input type="checkbox"/>			
• Responsible Employee	<input type="checkbox"/>	703389	<a href="#">Cynthia Anderson</a>	
• Purch. Org. Auth. For Release	<input type="checkbox"/>			
• Location	<input type="checkbox"/>	multiple	<a href="#">multiple</a>	multiple

- Small Business Reserve is triggered on Create & Change modes

- Additional messages pertaining to the draft contract's incomplete fields may display
  - Review and address as applicable

# Header Tab - Basic Data Sub-tab

Contract Number 4400006486		Smart Number 15 EMS Supplies_Services FY 14-15		Contract Type Agency Contract		
Contract Owner <a href="#">337344 Angela Eshleman</a>						
Overview	<b>Header</b>	Items	Notes and Attachments	Conditions	Approval	Tracking
<b>Basic Data</b>	Condition	Hierarchy	Notes and Attachments	Output		
Identification			Currency, Values and Pricing			
Smart Number: 15 EMS Supplies_Services FY			Currency: *			

- The Header Tab consists of the following sub-tabs:
  - Basic Data
  - Condition
  - Hierarchy
  - Notes and Attachments
  - Output

# Header Tab - Basic Data Sub-tab

**Change SW Regular Contract 4400014332**

Read Only | Close | Release | Save | Check | Lock | Print Preview | Related Links

Contract Number 4400014332 (Change Version) Smart Number Test IFB for new validations screenshots Contract Type SW Regular Contract Status In Process

Overview | **Header** | Items | Notes and Attachments | Conditions | Approval | Tracking

Basic Data | Condition | Hierarchy | Notes and Attachments | Output | Document Totals | Account Assignment | Payment | User-Specified Status

▼ Basic

<p><b>Identification</b></p> <p>Smart Number: <input type="text" value="Test IFB for new validations sc"/></p> <p><input type="checkbox"/> Smart Number is External</p> <p><input type="checkbox"/> New Serial Part for Smart Number</p> <p>Contract Number: <input type="text" value="4400014332"/></p> <p>Contract Type: <input type="text" value="SW Regular Contract"/></p> <p>Basic Contract: <input type="checkbox"/></p> <p>Reason Code: <input type="text" value=""/></p> <p><b>Organization</b></p> <p>* Purchasing Organization: <input type="text" value="COPA Purchasing Organization"/></p> <p>* Purchasing Group: <input type="text" value="DGS Central Purchase Purchasing Group"/> <a href="#">Show Members</a></p> <p><b>Dates</b></p> <p>* Valid From / To: <input type="text" value="05/04/2015"/> - <input type="text" value="05/03/2018"/></p> <p>Alert Expiration: <input type="text" value="120"/> Day(s)</p> <p>Non Standard Terms &amp; Conditions: <input type="checkbox"/></p>	<p><b>Currency, Values and Pricing</b></p> <p>* Currency: <input type="text" value="USD"/></p> <p>Target Value: <input type="text" value="255,800.00"/> USD</p> <p>Alert Release Value: <input type="text" value="25"/> %</p> <p>Release Value: <input type="text" value="0.00"/> USD</p> <p><b>Service and Delivery</b></p> <p>Under/ Overdelivery Tolerance: <input type="text" value="0.00"/> % / <input type="text" value="0.00"/> %</p> <p><b>Status and Statistics</b></p> <p>Created On: <input type="text" value="07/01/2015"/></p> <p>Created By: <input type="text" value="P00446880"/></p> <p>Closeout Status: <input type="text" value="None"/></p> <p>Contract Name: <input type="text" value="4217 Medical Supplies &amp; Services"/></p> <p>Small Business Reserve: <input type="text" value="No"/></p>
---	--

- Review the defaulted information for accuracy and completeness
  - Make edits to any information, if necessary
  - Complete any open fields, as applicable

# Header Tab - Basic Data Sub-tab

## Header Tab - Basic Data Sub-tab

Dates

Valid From / To: \* 01/02/2014 - 01/02/2015

Alert Expiration: 120 Day(s)

- An Alert Expiration can be set for the Validity Period. This Alert Expiration will send out a notification to the Responsible Employee when set.

Currency, Values and Pricing

Currency: \* USD

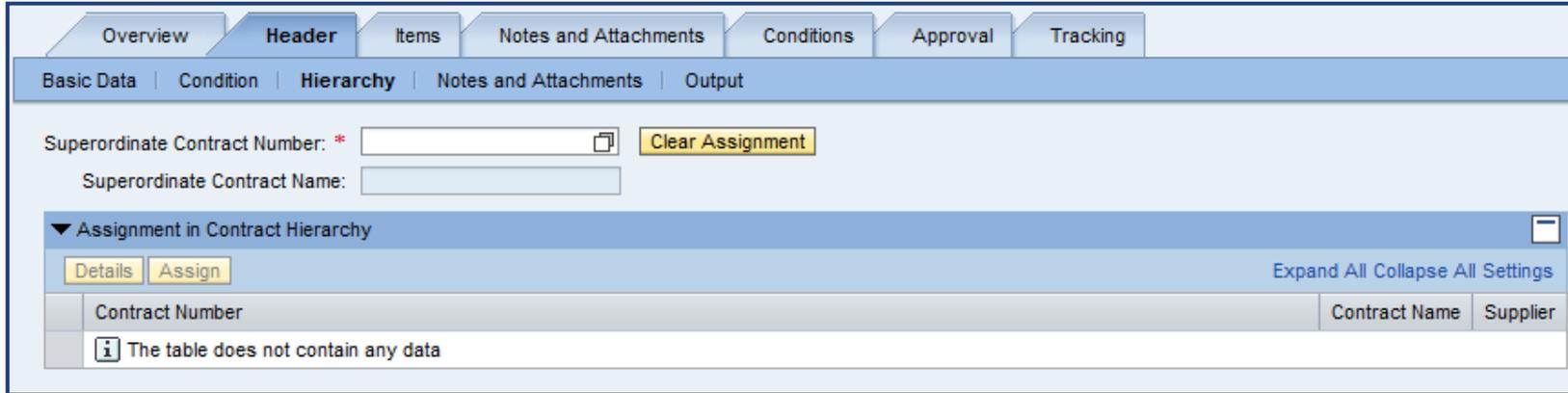
Target Value: 100,000.00 USD

Alert Release Value: 25 %

Release Value: 0.00 USD

- A release alert can be set by a percentage of the Target Value of a Contract. This Alert Release Value will send out a notification to the Responsible Employee when set.

# Header Tab - Hierarchy Sub-tab



Overview | **Header** | Items | Notes and Attachments | Conditions | Approval | Tracking

Basic Data | Condition | **Hierarchy** | Notes and Attachments | Output

Superordinate Contract Number: \*   [Clear Assignment](#)

Superordinate Contract Name:

▼ Assignment in Contract Hierarchy 

[Details](#) [Assign](#) [Expand All](#) [Collapse All](#) [Settings](#)

Contract Number	Contract Name	Supplier
 The table does not contain any data		

- The Hierarchy sub-tab is used by DGS to link statewide contracts together in a hierarchical structure

# Header Tab - Notes and Attachments Sub-tab

**Change Agency Contract 4400013442**

[Read Only](#)
[Close](#)
[Release](#)
[Save](#)
[Check](#)
[Print Preview](#)
[Delete](#)
[Related Links](#)

**Contract Number** 4400013442   
**Smart Number** CKA RFx Demo 1-2-14   
**Contract Type** Agency Contract   
**Status** Saved   
**Supplier** [171430 CENVEO CORPORATION](#)

**Contract Owner** [703389 Cynthia Anderson](#)

[Overview](#)
[Header](#)
[Items](#)
[Notes and Attachments](#)
[Conditions](#)
[Approval](#)
[Tracking](#)

[Basic Data](#)
[Condition](#)
[Hierarchy](#)
[Notes and Attachments](#)
[Output](#)

Here, you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes Filter Settings

[Clear](#)

Category	Description
<a href="#">Header Text</a>	-Empty-
<a href="#">Internal Note</a>	-Empty-
<a href="#">Vendor Text</a>	-Empty-
<a href="#">Encumbrance Information</a>	-Empty-
<a href="#">Insurance Information</a>	-Empty-
<a href="#">Release Order Text</a>	-Empty-

▼ Attachments Filter Settings

[Add Attachment](#)
[Edit Description](#)
[Versioning](#)
[Delete](#)

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Legal Document	<a href="#">Terms &amp; Conditions</a>	Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	46	SRMRFC	01/02/2014
Legal Document	<a href="#">Responses Report</a>	Responses Report	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	36	SRMRFC	01/02/2014
Legal Document	<a href="#">Reviewers Check List</a>	Reviewers Check List	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	23	SRMRFC	01/02/2014
Standard Attachment	<a href="#">Bid Specs for Emergency Medical Supplies</a>	Bid Specs for Emergency Medical Supplies.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	18	P00446880	01/02/2014

- As needed, add any other header level text or attachments

# Items Tab – Item Overview

**Change Agency Contract 4400013442**

Read Only | Close | Release | Save | Check | Print Preview | Delete | Related Links ▾

Contract Number 4400013442 Smart Number CKA RFX Demo 1-2-14 Contract Type Agency Contract Status Saved Supplier 171430 CENVEO CORPORATION  
Contract Owner 703389 Cynthia Anderson

Overview | Header | **Items** | Notes and Attachments | Conditions | Approval | Tracking

▼ Items

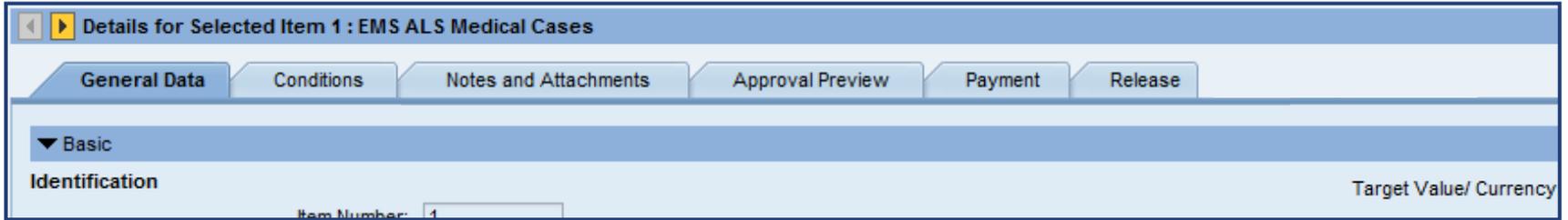
Details | Select ▾ | Add Item ▾ | Exercise Option | Copy | Paste | Duplicate | Delete

Filter Settings

Line Number	Item Category	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Price Per	Price Unit	Reference Item Number
1	Normal	1		EMT ALS Medical Cases	42171915	20.000		EA	2,995.00	149.75	USD	1	EA	0
2	Normal	2		Rescue Blankets	42171701	150.000		EA	3,787.50	25.25	USD	1	EA	0
3	Normal	3		Emergency Stretcher	42171611	20.000		EA	1,215.00	60.75	USD	1	EA	0
	Normal ▾					0.000			0.00	0.00	USD	0		0000000000
	Normal ▾					0.000			0.00	0.00	USD	0		0000000000
	Normal ▾					0.000			0.00	0.00	USD	0		0000000000
	Normal ▾					0.000			0.00	0.00	USD	0		0000000000
	Normal ▾					0.000			0.00	0.00	USD	0		0000000000
	Normal ▾					0.000			0.00	0.00	USD	0		0000000000
	Normal ▾					0.000			0.00	0.00	USD	0		0000000000

- Select the DETAILS button to view the details of each line item
- Review the defaulted information for accuracy and completeness
  - If necessary, make edits to any incorrect information

# Items Tab - Details



Details for Selected Item 1 : EMS ALS Medical Cases

General Data | Conditions | Notes and Attachments | Approval Preview | Payment | Release

▼ Basic

Identification Target Value/ Currency

Item Number:

- The Items Tab consists of the following sub-tabs:
  - General Data
  - Conditions
  - Notes and Attachments
  - Approval Preview
  - Payment
  - Releases

# Items Tab - General Data Sub-tab

Details for Selected Item 1 : EMS ALS Medical Cases

General Data | Conditions | Notes and Attachments | Approval Preview | Payment | Release

▼ Basic

**Identification**

Item Number:

Item Type:

Item Category: \*

Product ID:

Description:

Product Category: \*   EMS RESCUE CASES

Reference Item Number: \*

Target Value/ Currency:

Target Quantity/ Unit:  EA

Price:  USD per:  EA

Tax Code:

Release Quantity:  EA

Release Value:  USD

Under/ Overdelivery Tolerance:  % /  %

**Further Properties**

Supplier Product Number:

**Status and Statistics**

Status:  ▼

Closeout Status:

▼ Partner

Details Add Send E-Mail Call Clear Filter Settings

Function	Exclude	Number	Name	Phone Number
▪ Goods Recipient	<input type="checkbox"/>			
▪ Location	<input type="checkbox"/>	73	DGS	717-787-5996

- Review the defaulted information for accuracy and completeness

# Item Tab – Conditions Sub-tab

Details for Selected Item 3 : Emergency Stretcher

General Data **Conditions** Notes and Attachments Approval Preview Payment Release

▼ Conditions Filter Settings

Add Condition Scales Duplicate Remove

Condition Type	Sca...	Amount	Currency	Price Per	Price ...	Valid From	Location	Valid To	Location Name
Price(Contract/Bid)		60.75	USD	1	EA	01/02/2014		01/02/2015	

- Review the information on the Conditions sub-tab for accuracy

# Item Tab – Notes and Attachments Sub-tab

Details for Selected Item 3 : Emergency Stretcher

General Data | Conditions | **Notes and Attachments** | Approval Preview | Payment | Release

▼ Notes Filter Settings

Clear

Category	Description
<a href="#">Item Text</a>	Must meet weight requirements
<a href="#">Internal Note</a>	-Empty-
<a href="#">Vendor Text</a>	-Empty-
<a href="#">Material PO Text</a>	-Empty-
<a href="#">Shipping Instructions</a>	-Empty-

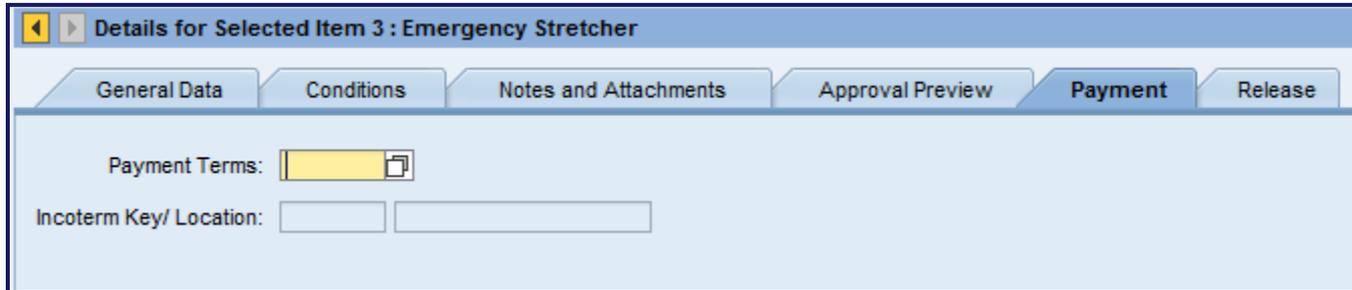
▼ Attachments Filter Settings

Add Attachment | Edit Description | Versioning | Delete

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
The table does not contain any data										

- As needed, add any other item level text

# Item Tab - Payment sub-tab



Details for Selected Item 3 : Emergency Stretcher

General Data   Conditions   Notes and Attachments   Approval Preview   **Payment**   Release

Payment Terms:  

Incoterm Key/ Location:

- The Payment Terms and Incoterm fields will populate based off of the supplier information
  - Terms must be in compliance with DGS procurement policies

# Item Tab – Release sub-tab



Details for Selected Item 1 : EM!

General Data | Conditions | Notes and Attachments | Approval Preview | Payment | **Release**

Filter Setting

Document	Document Number	Name	Item Number	Date	Quantity	Unit	Net Value	Currency	Purchasing Organization	Plant	Status

- The Release sub-tab displays procurement documents which have been released against the selected line item

# Notes and Attachments Tab

Overview										
Header										
Items										
Notes and Attachments										
Conditions										
Approval										
Tracking										
▼ Notes										
Add ▾ Clear <span style="float: right;">Filter Settings</span>										
Assigned To	Category		Text Preview							
Document Header	<a href="#">Header Text</a>		The Commonwealth of PA is seeking certain Emergency Medi...							
Document Header	<a href="#">Internal Note</a>		EMS supplies and services are needed in the event of a d...							
▼ Attachments										
Add Attachment Edit Description Versioning ▾ Delete <span style="float: right;">Filter Settings</span>										
Assigned To	Category	Description	File Name	Version	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Standard Attachment	<a href="#">EMS RESCUE BLANKET SPECIFICATIONS</a>	EMS Rescue Blanket Specifications.docx	1	<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Document Header	Standard Attachment	<a href="#">EMERGENCY HOSPITAL SERVICES REQUIREMENTS</a>	Emergency Hospital Services Requirements.docx	1	<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Document Header	Standard Attachment	<a href="#">EMS ALS MEDICAL CASE SPECIFICATIONS</a>	EMS ALS Medical Case Specifications.docx	1	<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Document Header	Standard Attachment	<a href="#">EMS EMERGENCY STRETCHER SPECIFICATIONS</a>	EMS Emergency Stretcher Specifications.docx	1	<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Document Header	Legal Document	<a href="#">Terms and Conditions</a>	Document	1	<input type="checkbox"/>	<input type="checkbox"/>	pdf	46	SRMRFC	08/09/2013

- The primary Notes and Attachments tab is a collection of all notes and attachments from the entire document
  - The “Assigned To” column identifies whether they are at the Document Header or Item level
  - Additions or edits to any notes or attachments may be made on this tab

# Conditions Tab

Content Area

Overview Header Items Notes and Attachments **Conditions** Approval Tracking

▼ Conditions Overview

Add Condition Scales Copy Clipboard Paste Clipboard Delete Clipboard Remove Expand All Collapse All Filter Settings

Level	Condition Type	Scales	Amount	Currency	Price per	Price Unit	Location	Valid From	Valid To	Location Name
▪	Price(Contract/Bid)		149.75	USD	1	EA		01/02/2014	01/02/2015	
▼ Item 2 - Rescue Blankets										
▪	Price(Contract/Bid)		25.25	USD	1	EA		01/02/2014	01/02/2015	
▼ Item 3 - Emergency Stretcher										
▪	Price(Contract/Bid)		60.75	USD	1	EA		01/02/2014	01/02/2015	

- Conditions tab displays information on the pricing for each line item and the validity period for that condition

# Approval Tab

Overview Header Items Notes and Attachments Conditions **Approval** Tracking

Current Status:  Header Approval Note:

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Header Item

**Header Approval Status**

[Remove Approver](#) [Settings](#)

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
001	SRM Contract Approval	Open (No Decision Made)	<a href="#">Terri Heimbach;Sheri Phillips;Anne Rung</a>			
002	SRM Contract Approval	Open (No Decision Made)	<a href="#">Gary Ankabrandt;Charles Anderson;SRM9937-Alice Miller;Joshua Harman</a>			
003	SRM Contract Approval	Open (No Decision Made)	<a href="#">Robert Mulle;Tammy Ruth;SRM1495-Sherise Mcmichael;Amy Elliott</a>			

- The Approval tab is functional in SRM 7.0 and shows the levels of approval the procurement document must achieve

# Tracking Tab

**Change Agency Contract 4400013442**

Read Only | Close | Release | Save | Check | Print Preview | Delete | Related Links

Contract Number 4400013442 Smart Number CKA RFX Demo 1-2-14 Contract Type Agency Contract Status Saved Supplier 171430 CENVEO CORPORATION Contract Owner 703389 Cynthia Anderson

Overview | Header | Items | Notes and Attachments | Conditions | Approval | **Tracking**

▼ History 

View: United States Dollar Filter Settings

Document	Name	Document Number	Back-End Document Number	Status	Date	Value	Currency
Shopping Cart	CKA Test Cart for Demo 1-2-14	11512654		Approved	01/02/2014	11,050.00	USD
RFX	CKA RFX Demo 1-2-14	6100027171		Published	01/02/2014	N/A	N/A
RFX Response	CKA RFX Demo 1-2-14	6500068158		Accepted	01/02/2014	0.00	USD
Central Contract	CKA RFX Demo 1-2-14	4400013442		Saved	01/02/2014	100,000.00	USD

▼ Status 

**System Status**  
Created > Complete > Held

▼ Version Overview 

Detail | Compare

Version	Document/Version Type	Created On	Changed On	Document Name
	Active Document	01/02/2014 14:23:45	01/02/2014 15:19:54	CKA RFX Demo 1-2-14

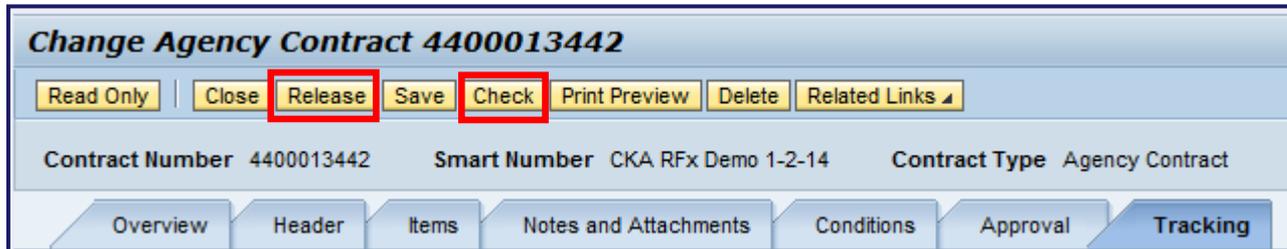
▼ Change Documents 

○ Changed Since  ○ Changed From/To   Search Expand All | Collapse All | Hide Query | Filter | Settings

Header/Item Attribute	Old Value	New Value	Changed By	Changed On	Changed At	Version
Header						

- The Tracking tab is comprised of various types of information such as:
  - Document History
  - Status
  - Versions
  - Change Documents

# Release the Contract



**Change Agency Contract 4400013442**

Read Only | Close | **Release** | Save | **Check** | Print Preview | Delete | Related Links ▾

Contract Number 4400013442    Smart Number CKA RFx Demo 1-2-14    Contract Type Agency Contract

Overview   Header   Items   Notes and Attachments   Conditions   Approval   **Tracking**

- Select the CHECK button to view and resolve any errors
- Select the RELEASE button to send the Contract document through approval workflow

- **Exercise 3 – Accepting Responses and Making an Award**

<http://eniesrwd01.state.pa.us/gm/folder-1.11.97456?mode=EU>

- From the dropdown, select Simulation

# Editing a Released Contract

# Editing a Released Contract

Central Contracts - All | Purchase Orders - All | Shopping Carts - All

Search Criteria

View: [Standard View] | Create Central Contract | Copy | Display | Edit | Mass Change | Display Hierarchy | Data Exchange | Print Preview | Refresh

Export

Central Contract Number	Central Contract Name	Status	Purchasing Organization	Supplier	Valid From	Valid To	Hierarchy
<a href="#">4400013442</a>	CKA RFX Demo 1-2-14	Released	COPA Purchasing Organization	CENVEO CORPORATION	01/02/2014	01/02/2015	<input type="checkbox"/>

Last Refresh 01/02/2014 15:52:52 EST [Refresh](#)

- Edits may be made to a Contract in Released status
- Select the contract number link to open the document

# Editing a Released Contract

**Display Agency Contract 4400013442**

Close Release **Edit** Copy Check Renew Print Preview Related Links

Contract Number: 4400013442    Smart Number: CKA RFx Demo 1-2-14    Contract Type: Agency Contract    Status: Released    Supplier: 171430 CENVEO CORP

Contract Owner: 703389 Cynthia Anderson

Overview Header Items Notes and Attachments Conditions Approval Tracking

**General Header Data**

Contract Number:	4400013442	Contract Owner:	703389 Cynthia Anderson
Smart Number:	CKA RFx Demo 1-2-14	Target Value/ Currency:	100,000.00 USD
<input type="checkbox"/> Smart Number is External		Release Value:	0.00 USD
Contract Description:	CKA Demo Contract 1-1-14	Basic Contract:	<input type="checkbox"/>
Supplier: *	171430 CENVEO CORPORATION		
Valid From / To: *	01/02/2014 - 01/02/2015		
Purchasing Organization: *	COPA Purchasing Organization		
Purchasing Group: *	DGS Central Purchase Purchasing Group	<a href="#">Show Members</a>	

- Select the EDIT button to begin making changes

# Editing a Released Contract

**Change Agency Contract 4400013442**

|

**Contract Number** 4400013442 (Change Version)   
 **Smart Number** CKA RFx Demo 1-2-14   
 **Contract Type** Agency Contract   
 **Status** In Process

**Supplier** [171430 CENVEO CORPORATION](#)   
 **Contract Owner** [703389 Cynthia Anderson](#)

| 
  | 
  | 
  | 
  | 
  |

General Header Data

- Post-Release, there are several differences in the document while it is in change mode
  - The Contract Number displays “(Change Version)” next to it
  - The Status is *In Process*
  - The LOCK button is now available – this button when selected removes a contract from sourcing

# Editing a Released Contract

**Change Agency Contract 4400013442**

Read Only | Close | **Release** | Save | Check | Lock | Print Preview | Related Links ▾

Contract Number 4400013442 (Change Version)    Smart Number CKA RFx Demo 1-2-14    Contract Type Agency Contract    Status In Process  
Supplier [171430 CENVEO CORPORATION](#)    Contract Owner [703389 Cynthia Anderson](#)

Overview | Header | Items | Notes and Attachments | Conditions | Approval | Tracking

General Header Data

- After the change(s) have been made, select the RELEASE button
  - Depending upon the significance of the change(s), the document may:
    - Follow approval workflow, or
    - Re-release automatically

# Summary

This completes your lesson, you should now be able to:

- Understand the special features of SRM 7.0
- Redistribute work to other sourcing professionals
- Source a requirement
- Create and edit solicitation documents
- Create and edit legal documents in Doc Builder
- Publish solicitations in the Supplier Portal
- Open, evaluate, and award responses to solicitations
- Create and edit contracts

# Knowledge Check

1. How many steps are in the Carry Out Sourcing Wizard?
  - a. 3
  - b. 4
  - c. 5

# Knowledge Check

2. Are you required to add the mandatory Questions to an RFX?
  - a. Yes
  - b. No

# Knowledge Check

3. After accepting a supplier's bid response, are you able to reverse the acceptance?
  - a. Yes
  - b. No

# Knowledge Check

4. The end-user is able to see who has approved the document throughout the approval process by selecting the Approval Tab.
  - a. True
  - b. False

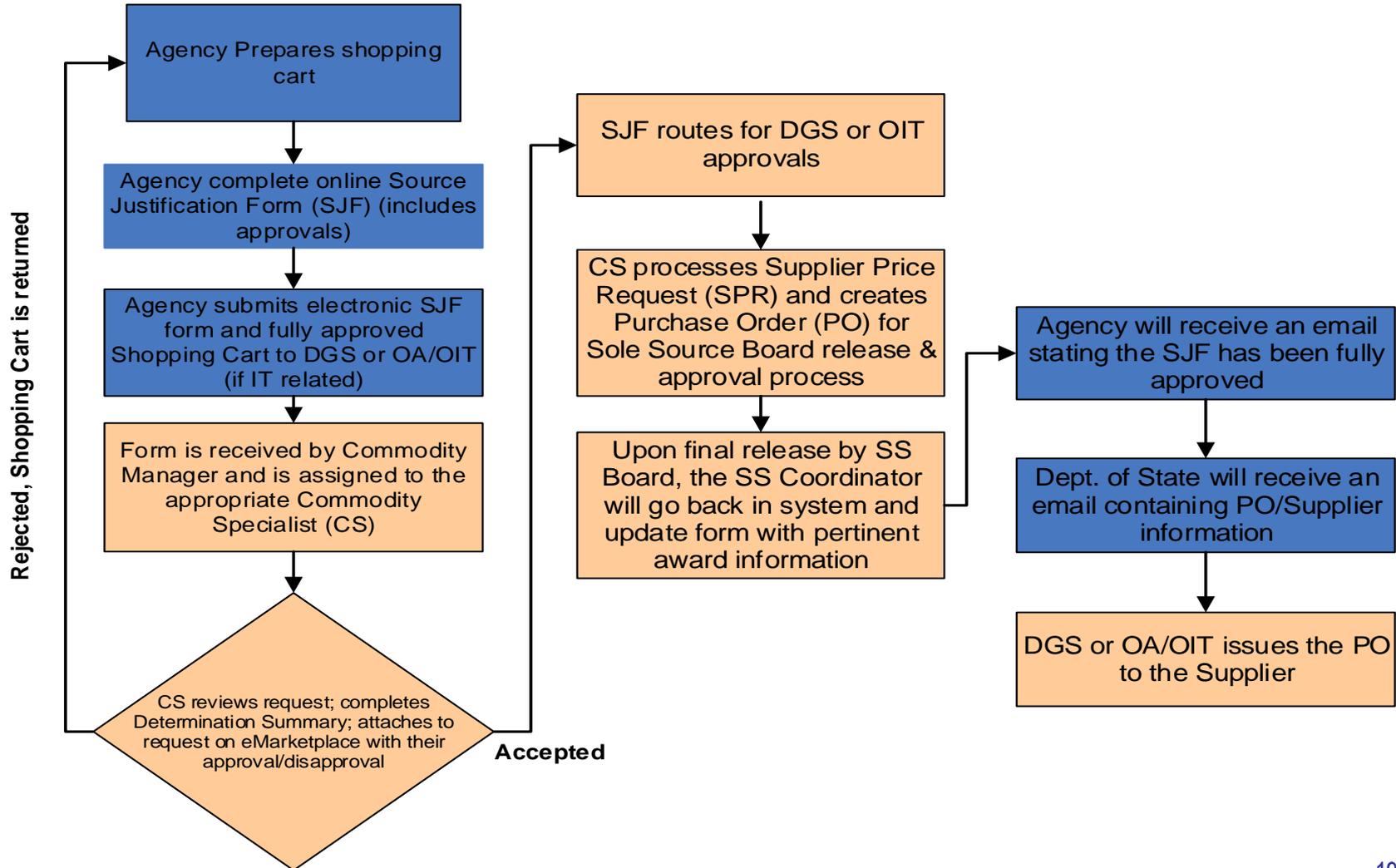
# Reference Material

# Sole Source Flowcharts

## (Appendix A & B)

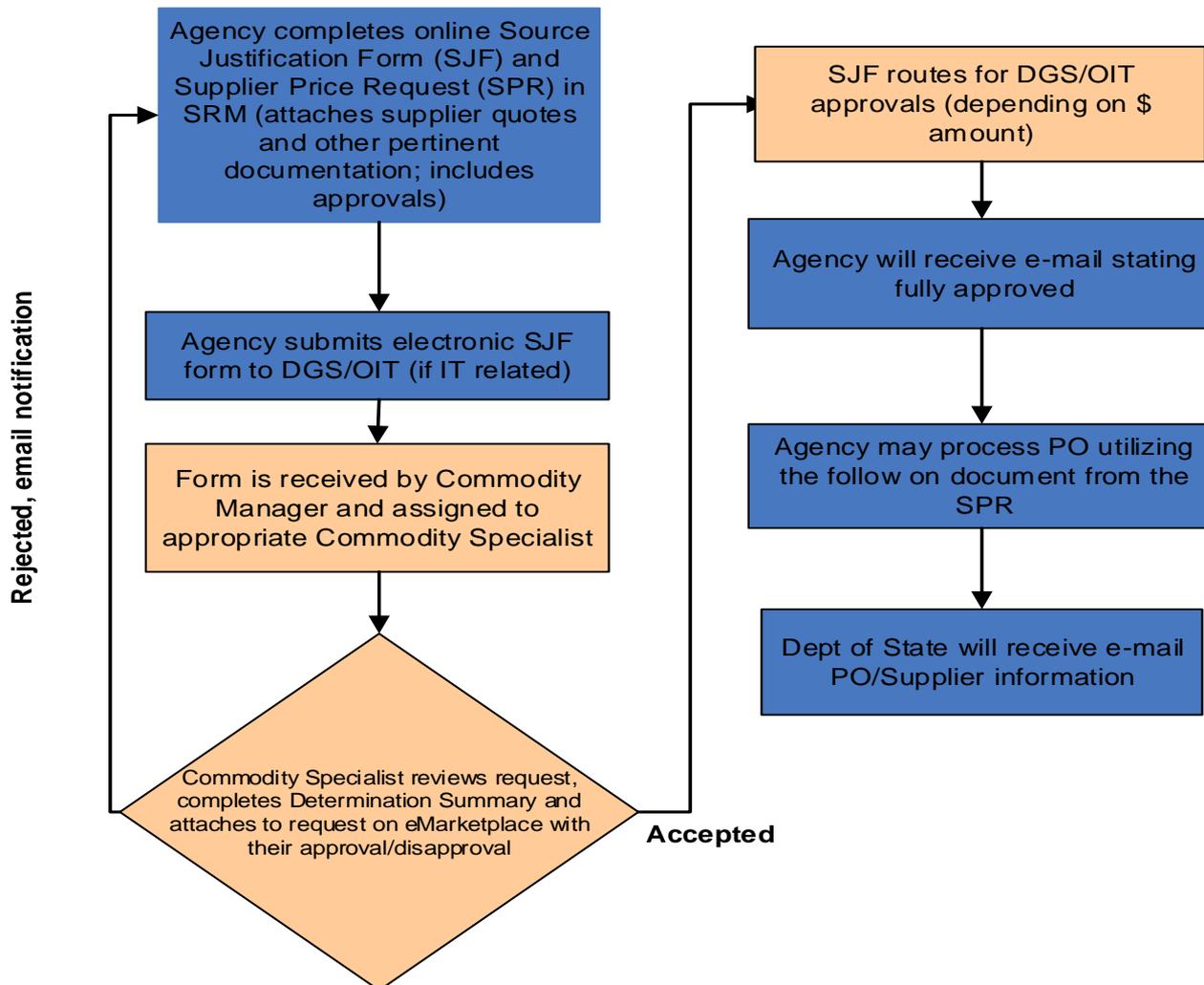
# Appendix A: Sole Source Material

## Sole Source Materials Process Map



# Appendix B: Sole Source Service

## Sole Source Services Process Map



# Appendix C:

# Create and Maintain User Address

# Create and Maintain User Address

It is necessary that the Purchaser keep their “company” addresses in SRM/SAP up to date. The reason for this is that the system is populating this address information into the Bid Invitation output form. The user that is having their name, address, and phone information being populated into the Bid Invitation is the designated “Responsible Employee” on the Bid Invitation. This person will usually be the creator of the Bid Invitation. The following is one way to populate the correct person to the Responsible Employee field.

# Create and Maintain User Address

RFX Information | Bidd

RFX Parameters | Questions

Responsible Employee

Search: Number

Search Criteria Hide Search Criteria

Name 1/last name is ANDERSON

Name 2/First name is CYNTHIA

Name 2/First name is

Search term 1 is

Maximum Number of Results: 500

Results List: 1 results found for Number

Last name	First name	Org. Unit Name	BusinessPartner
Anderson	Cynthia	GSPR7140	703389

Responsible Employee 703389 [Cynthia Anderson](#)

1. Go to the Partners and Delivery Information section of the RFX Parameters sub-tab
2. Select the matchcode to search for the Responsible Employee
3. Enter the appropriate search criteria, with an \* before and after
4. Select the Search button
  - a. Results will display
5. Select the gray box to the left of your selection to transfer the information to the Partners and Delivery Information section
6. Business Partner number of Responsible Employee is now inserted

# Create and Maintain User Address

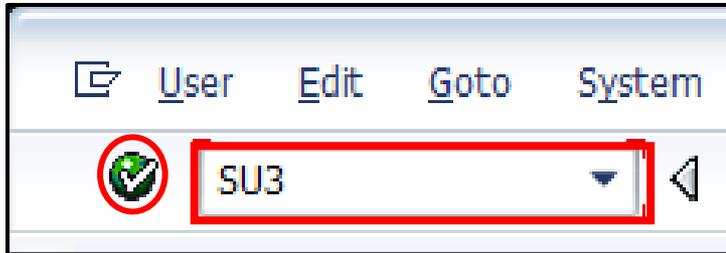
## Maintain User Company Data

	<b>ORIGINAL</b> <b>BID - Invitation For Bid</b> <b>P00068292 05/29/2007 12:50:38</b>		Page
	BID Effective Date:	<b>Bid Invitation Nu</b>  <b>6100000695</b>	
<b>Issuing Office:</b> Angela Eshleman Commonwealth of Pennsylvania US	<b>Supplier Name/Address:</b>  Your SAP Vendor Number with us: _____ <input type="checkbox"/> Disadvantaged business as defined by STD-203		
<b>Please Return Quotation to:</b> Commonwealth of Pennsylvania US	<b>Type of Security furnished if required:</b> <input type="checkbox"/> Certified bank cahier's check <input type="checkbox"/> Irrevocable letter of credit <input type="checkbox"/> Certificate of deposit <input type="checkbox"/> Other as specified by bid <input type="checkbox"/> Bond - If annual bond: What is the name of the principal on the bond?	Return Bid End Bid End 00:00:0	Expirat Contract applica
<b>Please Deliver To:</b>	<b>Procurement Contact:</b> Buyer: Angela Eshleman Phone: Fax:	Deliver See its	

- When a user's "company" address is incorrect or incomplete, it is reflected on their procurement documents
  - The user must update their contact information in SAP R/3

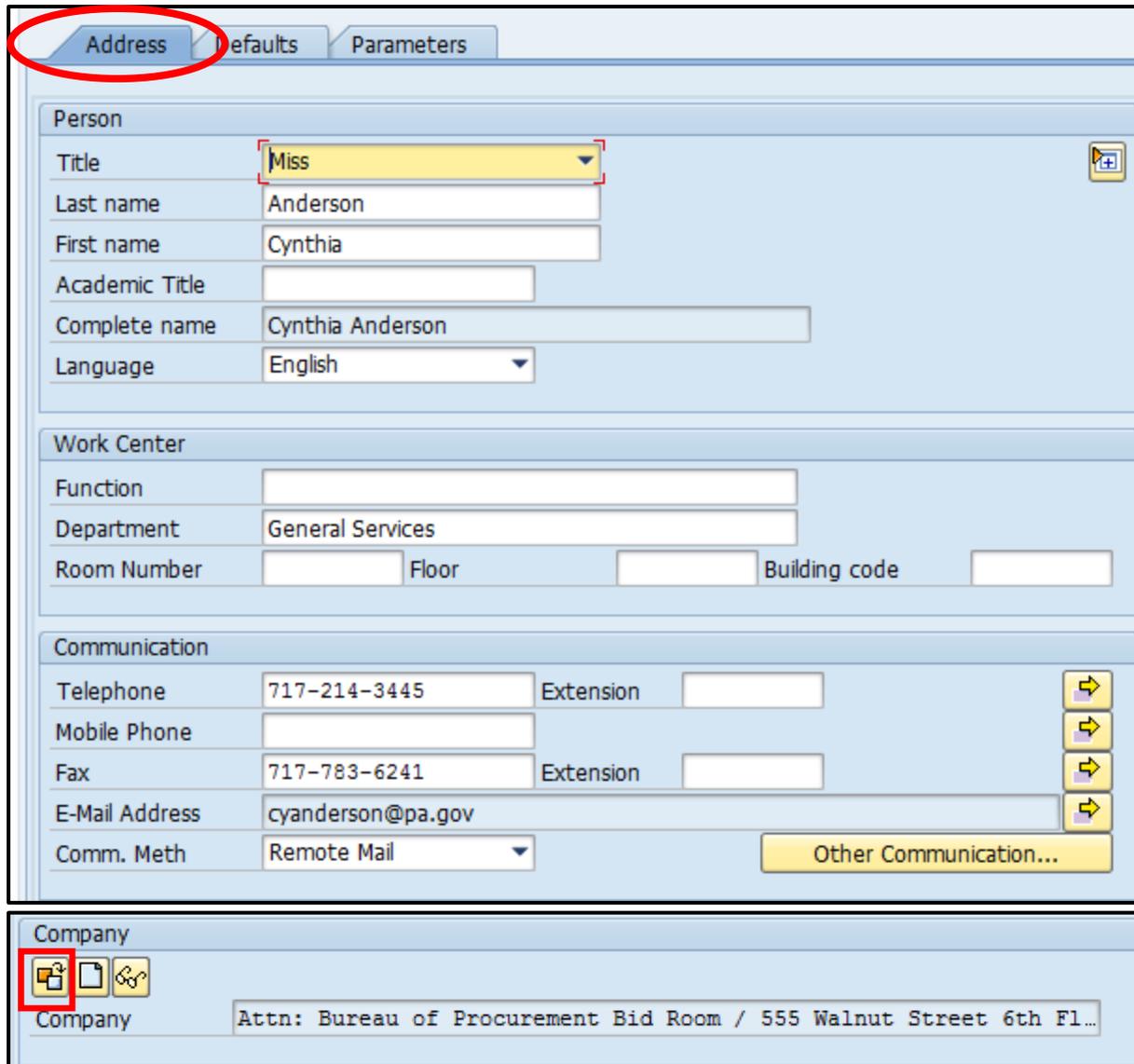
# SU3 - Maintain User's Data

## Maintain User Profile



- Log into SAP
  - Enter “SU3” (Maintain User Profile) in the transaction number field
  - Select the CHECKMARK icon to confirm

# SU3 - Maintain User's Data



**Address** Defaults Parameters

**Person**

Title  

Last name

First name

Academic Title

Complete name

Language

**Work Center**

Function

Department

Room Number  Floor  Building code

**Communication**

Telephone  Extension  

Mobile Phone  

Fax  Extension  

E-Mail Address  

Comm. Meth

**Company**

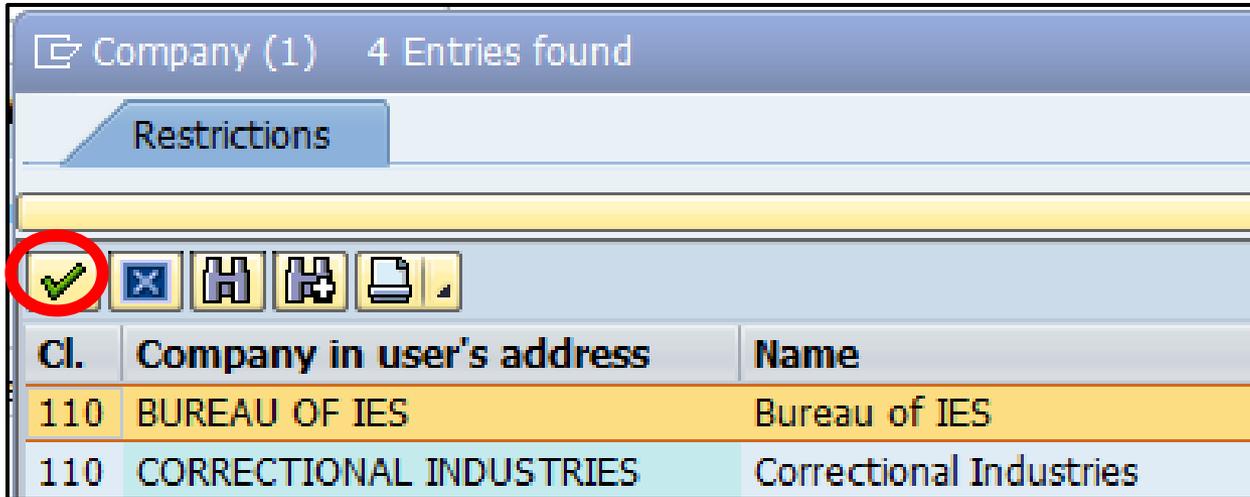
  

Company

- On the Address tab, enter or edit the data in the applicable data fields such as Name, Department, Telephone no., and Fax
  - Note that data such as email (workflow) cannot be changed
- Select the *ASSIGN OTHER COMPANY ADDRESS* icon

# SU3 - Maintain User's Data

## Maintain User Profile



Company (1) 4 Entries found

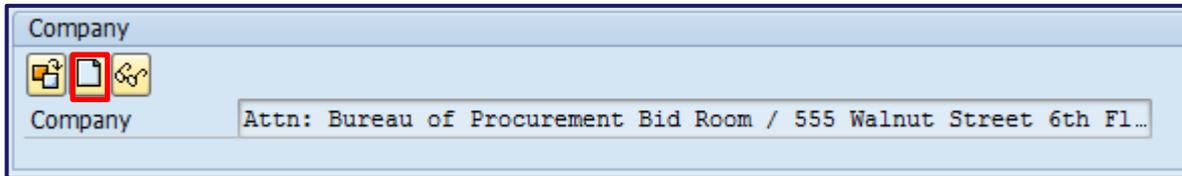
Restrictions

✓ ✕ H H

Cl.	Company in user's address	Name
110	BUREAU OF IES	Bureau of IES
110	CORRECTIONAL INDUSTRIES	Correctional Industries

- Search through the existing addresses and choose the appropriate entry, if available
- Select the green checkmark to copy the address into the user's profile

# SU3 - Maintain User's Data

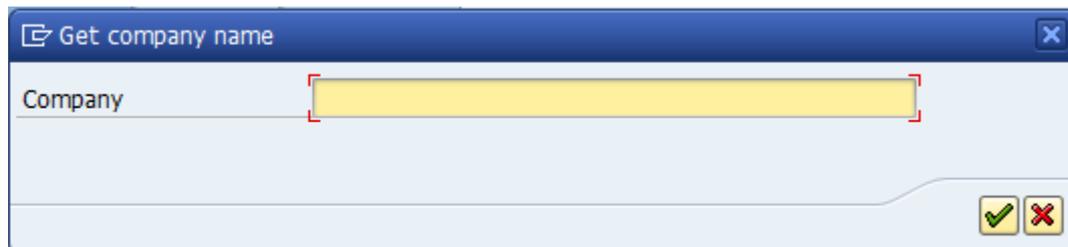


Company

Company Attn: Bureau of Procurement Bid Room / 555 Walnut Street 6th Fl...

- If no suitable address is found, then return to previous screen and select the ASSIGN NEW COMPANY ADDRESS icon

- Give the “New Company a name

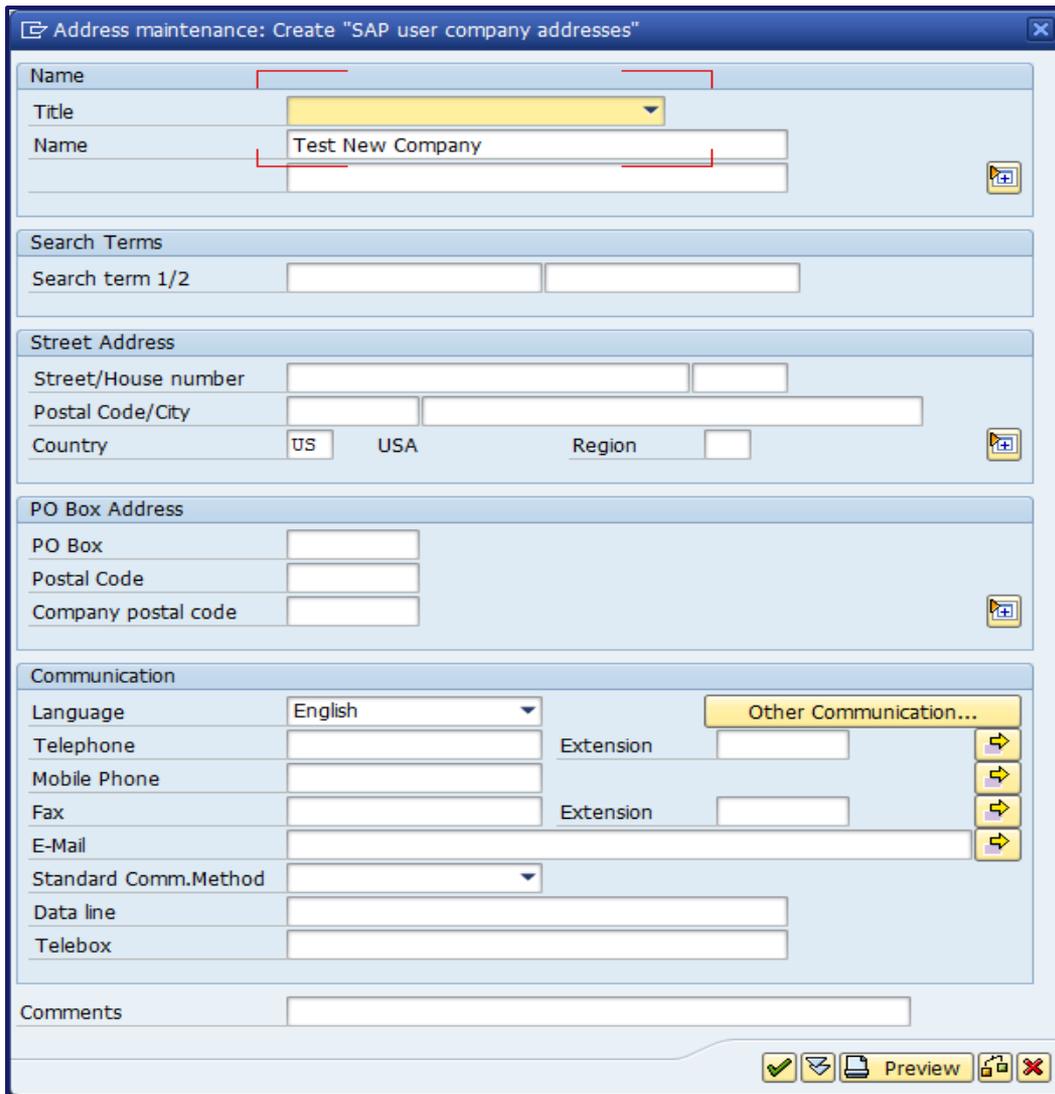


Get company name

Company

# SU3 - Maintain User's Data

## Maintain User Profile



The screenshot shows a SAP web interface for creating user company addresses. The form is titled "Address maintenance: Create 'SAP user company addresses'". It contains several sections:

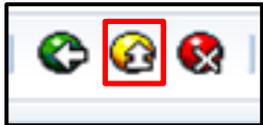
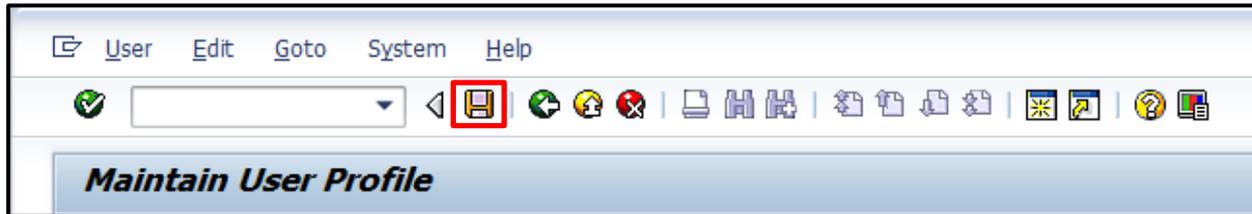
- Name:** Includes fields for Name (containing "Test New Company"), Title (a dropdown menu), and another Name field.
- Search Terms:** Includes a field for "Search term 1/2".
- Street Address:** Includes fields for "Street/House number", "Postal Code/City", "Country" (with "US" and "USA" options), and "Region".
- PO Box Address:** Includes fields for "PO Box", "Postal Code", and "Company postal code".
- Communication:** Includes fields for "Language" (set to "English"), "Telephone", "Mobile Phone", "Fax", "E-Mail", "Standard Comm.Method", "Data line", and "Telebox". There are also "Extension" fields for Telephone and Fax, and a "Other Communication..." button.
- Comments:** A large text area at the bottom.

At the bottom right of the form, there are icons for a green checkmark, a mail icon, a document icon labeled "Preview", a lock icon, and a red X icon.

- Enter the new address to be used, as shown in the example
- Select the green checkmark to copy the new address into the user profile
- Do **not** put a telephone number or fax number into the “New Company Address”

# SU3 – Maintain User's Own Data

- Select the SAVE button and save the new address to the user
- Select the BACK arrow and exit out of SU3 and SAP



# SU3 - Maintain User's Data

## Maintain User Profile

- When the  *ASSIGN OTHER COMPANY ADDRESS* button is used, the updated company address will replicate from R/3 to SRM within the same day
- When the  *ASSIGN NEW COMPANY ADDRESS* button is used, the new company address will not replicate from R/3 to SRM until the next morning



pennsylvania

DEPARTMENT OF GENERAL SERVICES

**SAP**

**S**upplier  
**R**elationship  
**M**anagement

**SRM 7.0**

**Creating & Maintaining  
Solicitations (RFx) &  
Contracts**

Thank you!