



Commodity Specialist Guide to Creating an Invitation to Qualify (ITQ) Contract on the ITQ Website

End User Procedure

Last Revised: 11/23/2011

Final

Table of Contents

BUILDING THE ITQ CONTRACT ON THE ITQ WEBSITE	3
Logging into the ITQ Website	3
Administering the ITQ Contract	5
Step 1 -- Create ITQ Header	6
Step 2 -- Part I - Statement of Work	11
Step 3 -- Additional Required Documentation	15
Step 4 -- Part II - Bid Requirements	19
Step 5 -- Define Service Categories	23
Step 6 -- Client Reference Survey Questions	34
Step 7 -- Part III - Bid Open Enrollment Process.....	39
Step 8 -- Part IV - Terms & Conditions	43

BUILDING THE ITQ CONTRACT ON THE ITQ WEBSITE

Logging into the ITQ website

From the DGS Procurement website, left navigation pane, choose:

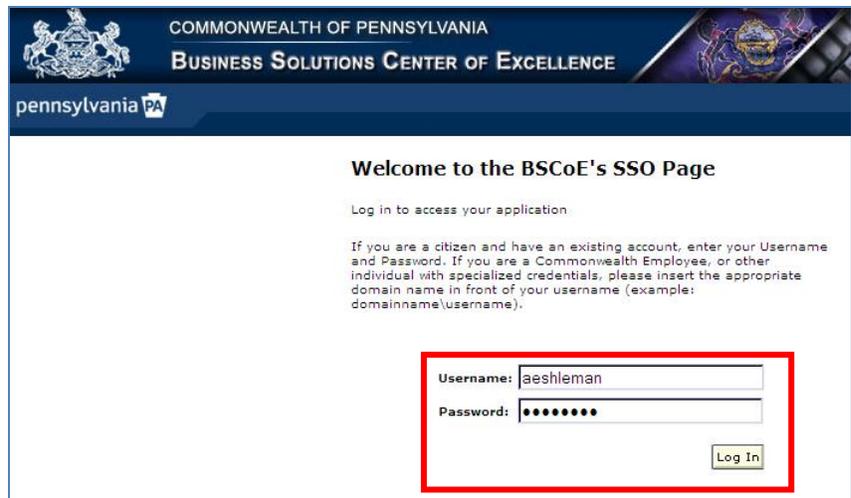
- 1) Invitation to Qualify

OR

Log directly into the website at www.itgrp.state.pa.us.

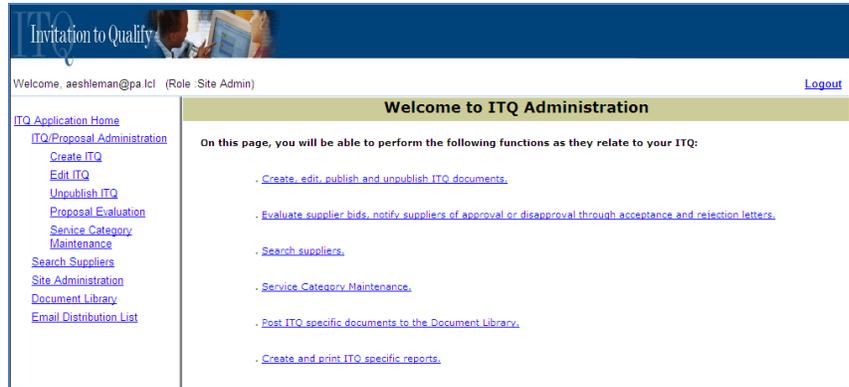


- 2) You are automatically redirected to the Business Solutions Center of Excellence's website.
- 3) The Welcome / Login webpage is displayed.
- 4) Complete the following using your current CWOPA credentials:
 - Username
 - Password
- 5) Select the Log In button.



6) You are logged into the ITQ Application website and redirected to the ITQ/Proposal Administration page.

7) You may select any of the links on the page to begin performing the function(s) described in the next section.



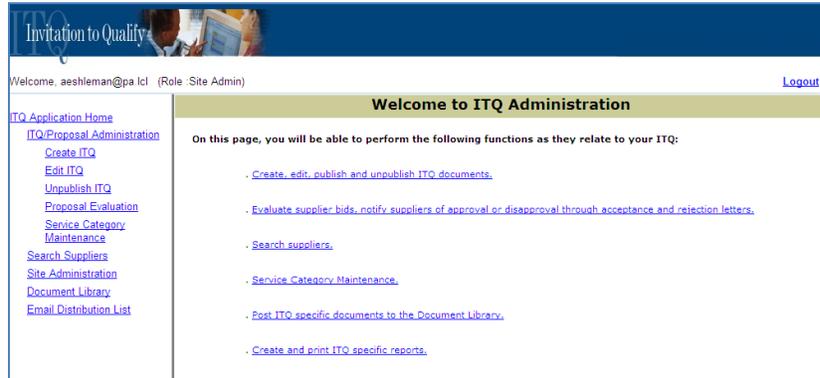
 **NOTE:** If you have trouble logging into the system, please contact the ITQ Site Administrator, Joe Millovich, at (717) 214-3434. Or jmillovich@pa.gov.

Administering the ITQ Contract

The ITQ/Proposal Administration page is used to access the various functions as they relate to your ITQ Contract. This page is most often used as it provides quick links and other commonly accessed data. By choosing these links, you will be able to, among other things, complete the nine (9) required steps for making your ITQ Contract available to both suppliers and agency purchasers. The following notes will give you an understanding of the tasks used to build each component of your ITQ on the website.

From the ITQ/Proposal Administration page:

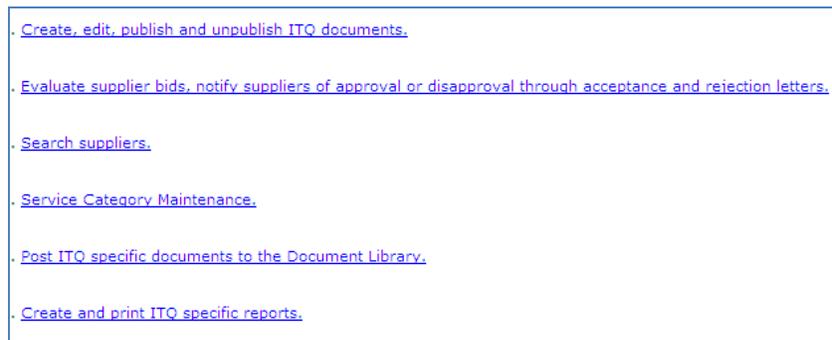
- 1) Links are located along the left navigation pane, as well as in the center of the page.



- 2) Individual, specific links are along the left navigation pane.



- 3) Quick-links are in the center of the page.



 **NOTE:** There are different Link options available depending on your access i.e. Site Administrator, ITQ Administrator, Financial Viewer, or Agency User.

Step 1 – Create ITQ Header

The following tasks are used to enter a new ITQ Contract on the website.

From the ITQ/Proposal Administration page:

- 1) Select the Create ITQ link.

OR

Select the Create, edit, publish and unpublish ITQ documents quick link.

ITQ Application Home
 ITQ/Proposal Administration
Create ITQ
 Edit ITQ
 Unpublish ITQ
 Proposal Evaluation
 Service Category Maintenance

Welcome to ITQ

On this page, you will be able to perform the following functions:

- . Create, edit, publish and unpublish ITQ documents.
- . Evaluate supplier bids, notify suppliers of approval or disapproval.
- . Search suppliers.

- 2) The **Create ITQ Menu** displays.

ITQ Application Home
 ITQ/Proposal Administration
 Create ITQ
 Edit ITQ
 Unpublish ITQ
 Proposal Evaluation
 Service Category Maintenance
 Search Suppliers
 Site Administration
 Document Library
 Email Distribution List

Create ITQ Menu

Help/Instructions
 To begin creating an ITQ, click Step 1. Create ITQ Header below. After completing Step 1, complete all subsequent steps by clicking on the appropriate button.

Step 1. Create ITQ Header	<input type="checkbox"/> ITQ Header Created
Step 2. Part I - Statement of Work	<input type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview

- 3) Select the **Step 1. Create ITQ Header** button.

Step 1. Create ITQ Header ITQ Header Created

- 4) The **Create ITQ Header** page displays.

On this form, you will enter the information central to the ITQ. All fields are required. Fields with the calendar icon/drop-down offer a calendar to choose dates from. Fields with the standard drop-down menu offer Yes/No choices for selection.

Create ITQ Header

Help/Instructions
 Begin this step by reserving a contract number in SRM, and then complete all fields with appropriate data for this ITQ that you are creating.

ITQ Header

SRM Contract #: ITQ Name:

Effective Date: Expiration Date:

Enrollment Open Date: Enrollment Close Date:

Are counties required for this ITQ?

Are references required for this ITQ? enter # of References:

Clear Save

Continue

- 5) Complete the following:

ITQ Header

SRM Contract #: ITQ Name:

Effective Date: Expiration Date:

Enrollment Open Date: Enrollment Close Date:

Are counties required for this ITQ?

Are references required for this ITQ? enter # of References:

SRM Contract #: Type in the number of the Contract that you set up in SRM.

ITQ Name: Type in a name for your ITQ.

Be aware that this field has a length of 32 characters and/or spaces.

ITQ Header

SRM Contract #: ITQ Name:

Effective Date: Expiration Date:

Enrollment Open Date: Enrollment Close Date:

Are counties required for this ITQ?

Are references required for this ITQ? enter # of References:

August, 2011

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Today: August 18, 2011

Continue

Dates (Effective, Expiration, Enrollment Open, Enrollment Close): These fields must be completed by selecting the calendar drop-down and choosing the appropriate date(s); you may not free-type in these fields.

Be aware that there is no shortcut to advancing through the calendar. You must scroll through the months using the next and previous icons.

ITQ Header

SRM Contract #: ITQ Name:

Effective Date: Expiration Date:

Enrollment Open Date: Enrollment Close Date:

Are counties required for this ITQ?

Are references required for this ITQ? enter # of References:

Yes

No

Clear Save

Are counties/references required for this ITQ?: As these are required fields, you must use the drop-down list to make your selection of either Yes or No.

Enter # of References: This is a dependent field, meaning that if you select Yes to the question *Are references required for this ITQ*, then you must change the default “0” to the appropriate number.

- 6) Select the **Save** button to save your entries.

Button Descriptions

BUTTON	ACTION
	Inserts your ITQ Header data into the ITQ Contract Table
	Clears all entered data on the form
	Redirects you to the Create ITQ Menu page without saving any entered data

- 7) You are returned to the **Edit ITQ Menu** page.
- a) Changes to the Menu are as follows:
- The checkbox next to Step 1 has been marked, indicating that the ITQ Header has been uploaded
 - Step 1 has been renamed to *Edit* ITQ Header

Step 2 – Part I - Statement of Work

The following tasks are used to upload the Statement of Work into the ITQ Contract on the website.

From the Edit ITQ Menu page:

- 1) Select the **Step 2. Part I – Statement of Work** button.

Edit ITQ Menu	
Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
Back to Select ITQ	

- 2) The **Part I – Statement of Work** page displays.

This form is divided into two sections: Upload – Statement of Work and Available – Statement of Work. Use the Upload – Statement of Work section to upload the contract’s Statement of Work to the ITQ. It is required that this document be uploaded in two different document types: PDF and HTML. When appropriate, use the Available – Statement of Work section to delete a document that should no longer be associated with the contract.

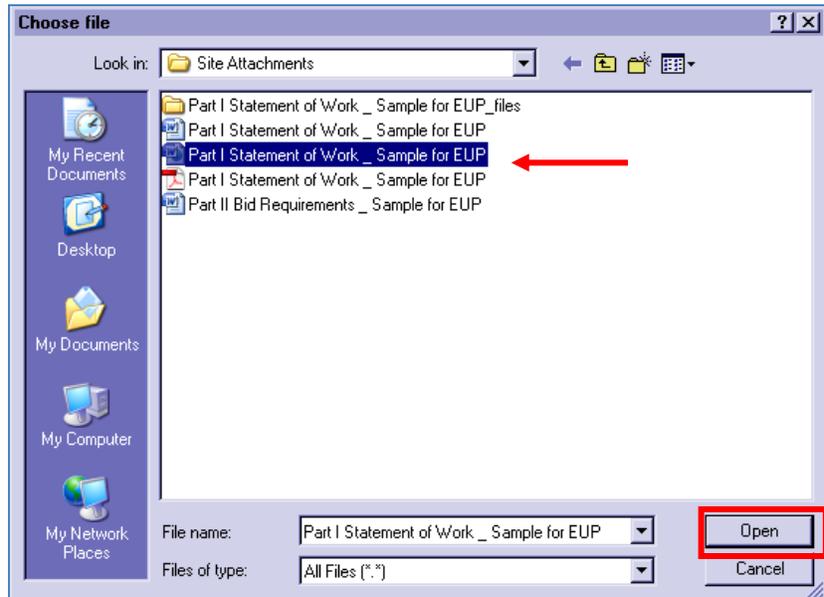
Part I - Statement of Work
<p>Help/Instructions</p> <p><i>In this step, you must upload Part I – Statement of Work for this ITQ.</i></p> <p><i>This step requires uploading two separate file types for the same document. One is a PDF and the other must be an HTML document. You should convert your WORD document to PDF and also save it as an HTML file using the instructions below:</i></p> <p><i>To convert to PDF: There are several online tools for converting a WORD document to a PDF. One is located here.</i></p> <p><i>To convert to HTML: Click Here for Step by Step Instructions</i></p>
<p>Upload - Statement of Work</p> <p>SRM Contract #: 4400987654 Contract Name: ITQ Development EUP</p> <p>Document Location: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/></p>
<p>Available - Statement of Work</p> <p>No Statement of Work found for SRM Contract Number: 4400987654!</p> <p><input type="button" value="Continue"/></p>

- 3) Select the **Browse** button to upload the Statement of Work document in two different file types:

- PDF
- HTML



- 4) Locate the applicable file.
- 5) Select (highlight) the applicable file.
- 6) Select the **Open** button.



The file path has been inserted into the Document Location field.

- 7) Select the **Upload** button.



A confirmation message is displayed in green stating that the file was successfully uploaded.

The file is now displayed as a hyperlink in the Available – Statement of Work section.

- 8) Repeat the above steps with the remaining file [type].



- 9) Select both links to validate that they open correctly.
 - a) If one or both do not, delete the file(s) and repeat the upload process.
- 10) Select the **Continue** button.

Upload - Statement of Work

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP

Document Location:

File Name : Part I Statement of Work _ Sample for EUP.pdf successfully uploaded.

Available - Statement of Work

Time Stamp	Document	
8/18/2011	http://www.itqrs.state.pa.us/ITQ_Admin/ITQs/4400987654/WorkScope/Part I Statement of Work_Sample for EUP.htm	<input type="button" value="Delete"/>
8/18/2011	http://www.itqrs.state.pa.us/ITQ_Admin/ITQs/4400987654/WorkScope/Part I Statement of Work_Sample for EUP.pdf	<input type="button" value="Delete"/>

- 11) You are returned to the **Edit ITQ Menu** page.
The checkbox next to Step 2 has been marked as completed.

Edit ITQ Menu

Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview

Step 3 – Additional Required Documentation

The following tasks are used, as applicable, to establish the requirement for suppliers to upload specific documents along with their proposals for the ITQ Contract on the website.

From the Edit ITQ Menu page:

- 1) Select the **Step 3. Additional Required Documentation** button.

Edit ITQ Menu	
Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
Back to Select ITQ	

- 2) The **Additional Required Documentation** page displays.

This form is divided into two sections: Create – Additional Required Documentation and Available – Additional Required Documentation. Use the Create – Additional Required Documentation section to establish the specific document or form to be required as part of a supplier’s proposal to the ITQ in order to be considered qualified. When appropriate, use the Available – Additional Required Documentation section to edit or delete a document name that no longer require to be a part of the supplier’s proposal.

Additional Required Documentation

Help/Instructions

In this step, you must specify the additional types of documentation that the supplier will be required to submit as part of their proposal. Detailed instructions on what to name the files and how to upload the documentation will be contained in Part II - Bid Requirements of the ITQ. Also, specify what types of contacts are required on the Vendor Profile. (i.e. ITQ Technical, Executive, Legal, etc)

Create - Additional Required Documentation

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP
 Enter Document Name:

Available - Additional Required Documentation

No form types entered for SRM Contract Number: 4400987654!

3) Type the document name in the Enter Document Name field.

4) Select the **Add** button.

A confirmation message is displayed in green stating that the document name was successfully added.

The document name is displayed in the Available – Additional Required Documentation section.

Create - Additional Required Documentation

SRM Contract #: 4400987654
Contract Name: ITQ Development EUP

Enter Document Name: **Add**

Create - Additional Required Documentation

SRM Contract #: 4400987654
Contract Name: ITQ Development EUP

Enter Document Name: **Add**

Insurance Certificate Added. ←

Available - Additional Required Documentation

Document Name		
Insurance Certificate	←	Edit Delete

Continue

5) Repeat the above steps as necessary until all document names have been added.

6) Select the **Continue** button.

Create - Additional Required Documentation

SRM Contract #: 4400987654
Contract Name: ITQ Development EUP

Enter Document Name: **Add**

Resume Added.

Available - Additional Required Documentation

Document Name		
Insurance Certificate		Edit Delete
Financial Information		Edit Delete
Resume		Edit Delete

Continue

7) You are returned to the **Edit ITQ Menu** page.
 The checkbox next to Step 3 has been marked as completed.

Edit ITQ Menu	
Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
Back to Select ITQ	

 **IMPORTANT NOTE:** This step gives the Commodity Specialist a means to identify specific documents that **all** suppliers must include with their proposals, such as *Financials* and *Resumes*. If the supplier does not fulfill the requirement of uploading at least *one* document in each of these areas, they will be prevented from submitting their proposal.

For this reason, be careful not to ‘force’ **all** suppliers to upload a document which is only required by **some**, such as a Small Business Certification form. In these instances, you could use the “correct” scenario below, customized to fit your ITQ if needed.

Correct

All Required Documentation

Incorrect

Financials (required for all)

Resumes (required for all)

Small Business Certification form (req. for some)

Step 4 – Part II – Bid Requirements

The following tasks are used to upload the Bid Requirements into the ITQ Contract on the website.

From the Edit ITQ Menu page:

- 1) Select the **Step 4. Part II – Bid Requirements** button.

Edit ITQ Menu	
Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
Back to Select ITQ	

- 2) The **Part II – Bid Requirements** page displays.

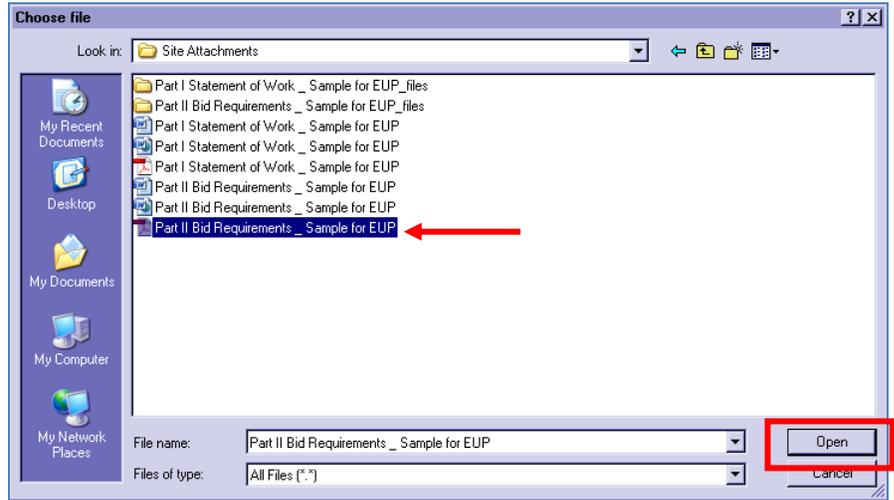
This form is divided into two sections: Upload – Bid Requirements and Available – Bid Requirements. Use the Upload – Bid Requirements section to upload the contract’s Bid Requirements to the ITQ. It is required that this document be uploaded in two different document types: PDF and HTML. When appropriate, use the Available – Bid Requirements section to delete a document that should no longer be associated with the contract

Part II - Bid Requirements
<p>Help/Instructions</p> <p><i>In this step, you must upload Part II – Bid Requirements for this ITQ.</i></p> <p><i>This step requires uploading two separate file types for the same document. One is a PDF and the other must be an HTML document. You should convert your WORD document to PDF and also save it as an HTML file using the instructions below:</i></p> <p><i>To convert to PDF: There are several online tools for converting a WORD document to a PDF. One is located here.</i></p> <p><i>To convert to HTML: Click Here for Step by Step Instructions</i></p>
<p>Upload - Bid Requirements</p> <p>SRM Contract #: 4400987654 Contract Name: ITQ Development EUP</p> <p>Document Location: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/></p>
<p>Available - Bid Requirements</p> <p>No Bid Requirements Found for SRM Contract Number: 4400987654!</p> <p><input type="button" value="Continue"/></p>

- 3) Select the **Browse** button to upload the Bid Requirements document in two different file types:
 - PDF
 - HTML



- 4) Locate the applicable file.
- 5) Select (highlight) the applicable file.
- 6) Select the **Open** button.



The file path has been inserted into the Document Location field.

- 7) Select the **Upload** button.



A confirmation message is displayed in green stating that the file was successfully uploaded.

The file is displayed as a hyperlink in the Available – Bid Requirements section.

- 8) Repeat the above steps with the remaining file [type].



- 9) Select both links to validate that they open correctly.
 - a) If one or both do not, delete the file(s) and repeat the upload process.
- 10) Select the **Continue** button.

Upload - Bid Requirements

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP

Document Location:

File Name : Part II Bid Requirements _ Sample for EUP.htm successfully uploaded.

Available - Bid Requirements

Time Stamp	Document	
8/29/2011	http://www.itqrp.state.pa.us/ITQ_Admin/ITQs/4400987654/QualificationRequirements/Part II Bid Requirements _ Sample for EUP.pdf	<input type="button" value="Delete"/>
8/29/2011	http://www.itqrp.state.pa.us/ITQ_Admin/ITQs/4400987654/QualificationRequirements/Part II Bid Requirements _ Sample for EUP.htm	<input type="button" value="Delete"/>

- 11) You are returned to the **Edit ITQ Menu** page.
 The checkbox next to Step 4 has been marked as completed.

Edit ITQ Menu

Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input checked="" type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
<input type="button" value="Back to Select ITQ"/>	

Step 5 – Define Service Categories

The following tasks are used to incorporate the ITQ Service Categories into the ITQ Contract on the website.

When applicable, Technical Requirements as well as Technical Categories may be incorporated into the appropriate Service Category. Due to these variables, this section of the End User Procedure will be broken down into *Scenarios* within in the instructional steps. However, please be aware that there is no specific order that any of the instructional steps need to be completed in.

 **NOTE:** The Service Categories and their descriptions were established when the ITQ’s Statement of Work was developed. And, when applicable, Technical Requirements and Technical Categories were established. In Step 5 – Define Service Categories, you are simply incorporating them into the ITQ Contract on the website.

Scenario 1: Entering one or more Service Categories, no Technical Requirements or Technical Categories

From the *Edit ITQ Menu* page:

- 1) Select the **Step 5. Define Service Categories** button.

Edit ITQ Menu	
Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input checked="" type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories 	<input type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
Back to Select ITQ	

2) The **Define Service Categories** page displays.

This form is divided into two sections: Create – Service Category and Available – Service Category. Use the Create – Service Category section to enter the contract’s Service Categories and Technical Requirements to the ITQ. When applicable, use the Available –Service Category section to delete a Service Category that should no longer be associated with the contract. The Available – Service Category section may also be used to edit Service Categories, or to add a new Technical Requirement to the appropriate Service Category.

Define Service Categories

Help/Instructions

In this step, you must define the Service Categories and any Technical Requirements that are necessary for this ITQ.

Create - Service Category

Title and Description fields are mandatory. After entering data in these fields, click the Add Service Category button. Then, you may proceed to the Technical Requirements section by clicking on the "Add_TR" button in the appropriate Service Category Line in the Service Categories List.

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP

Title:

Description:

Available - Service Category

No Service categories found for Contract Number: 4400987654!

 **TIP:** The simplest way to perform this step is to use “Copy” and “Paste” rather than typing it from scratch. While leaving the ITQ Website open at the *Create – Service Category* page, locate your Statement of Work document and open it as well, scrolling to the page containing your Service Categories.

In the Statement of Work document, highlight the first Service Category name to select it. “Right-click” on your mouse, and then choose **Copy** on the menu that displays. Go back to the window containing the ITQ website and select the *Title* field. “Right-click” on your mouse, and this time choose **Paste** on the menu that displays. The information is now inserted. Repeat this process to insert the Service Category *Description*.

Continue following the above process until all Service Categories have been established.

Button Descriptions

BUTTON	ACTION
Add Service Category	Adds the entered data into the ITQ
Continue	Redirects you to the Edit ITQ Menu page
Delete	Removes the applicable Service Category from the ITQ
Edit	Allows you to edit the applicable Service Category
Add_TR	Allows you to enter a new Technical Requirement for the applicable Service Category

- 3) Select the **Add Service Category** button.

Create - Service Category

Title and Description fields are mandatory. After entering data in these fields, click the Add Service Category button. Then, you may proceed to the Technical Requirements section by clicking on the "Add_TR" button in the appropriate Service Category Line in the Service Categories List.

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP

Title: Consulting Services - IT Project Management

Description: Include, but are not limited to: any services that assist agencies to govern, manage, measure, and resource their IT projects or portfolio of IT projects to improve overall business performance and support and maintain Commonwealth and industry project management standards and methodologies.

Add Service Category

The Title and Description is displayed in the Available – Service Category section.

A confirmation message is displayed in green stating that the information was successfully added.

- 4) Repeat the above steps as necessary until all Service Categories have been added.
 - a) Be aware that your Service Categories may not display within the Available – Service Category area in the same order that you entered them.
- 5) Select the **Continue** button.

Create - Service Category

Title and Description fields are mandatory. After entering data in these fields, click the Add Service Category button. Then, you may proceed to the Technical Requirements section by clicking on the "Add_TR" button in the appropriate Service Category Line in the Service Categories List.

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP

Title:

Description:

Add Service Category

Available - Service Category

Title	Description	Comments Required			
Consulting Services - IT Project Management	Include, but are not limited to: any services that assist agencies to govern, manage, measure, and resource their IT projects or portfolio of IT projects to improve overall business performance and support and maintain Commonwealth and industry project management standards and methodologies.	Y	Delete	Edit	Add_TR

Service category Consulting Services - IT Project Management added. ←

Continue

6) You are returned to the **Edit ITQ Menu** page.

The checkbox next to Step 5 has been marked as completed.

Edit ITQ Menu	
Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input checked="" type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input checked="" type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
Back to Select ITQ	

Scenario 2: Adding one or more Technical Requirements to a Service Category, no Technical Categories

From the Create – Service Category screen:

- 1) Scroll down to the Available – Service Category area.
- 2) For the applicable Service Category, select the Add_TR button.

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP

Title:

Description:

Add Service Category

Available - Service Category

Title	Description	Comments Required	Delete	Edit	Add_TR
Boating, Kayaking & Canoeing Equipment	Including but not limited to canoes, kayaks, paddle boats, canoe paddles, kayak paddles, kayak specific life jackets, dry bags, paddle floats, tow ropes, life jackets, any NON MOTORIZED equipment.	Y	Delete	Edit	Add_TR
Camping, Backpacking & Hiking Equipment	Including but not limited to tents, sleeping bags, trekking poles, backpacks, backpacking stoves, cook stoves, sleeping pads, outdoor cooking pots-pans-utensils, water filters.	Y	Delete	Edit	Add_TR
Consulting Services - IT Project Management	Include, but are not limited to: any services that assist agencies to govern, manage, measure, and resource their IT projects or portfolio of IT projects to improve overall business performance and support and maintain Commonwealth and industry project management standards and methodologies.	Y	Delete	Edit	Add_TR
Consulting Services - IV&V	Include, but are not limited to: requirements validation and tracing, milestone review, metrics analysis, test witnessing, site acceptance testing, defect investigation, vendor analysis and selection, quality assurance and management, reporting and documentation review for IT and telecommunications projects.	Y	Delete	Edit	Add_TR

Service category Boating, Kayaking & Canoeing Equipment added.

Continue

- 3) The Define Service Categories page re-displays; however, the “Create” component is now for a Technical Requirement.

This form is divided into two sections: Create – Technical Requirement and Available – Technical Requirement. Use the Create – Technical Requirement section to enter the Service Category’s Technical Requirements and, if applicable, the Technical Requirement’s Technical Category/ies to the ITQ. When applicable, use the Available – Technical Requirements section to delete a Technical Requirement that should no longer be associated with the Service Category. The Available – Technical Requirements section may also be used to edit a Technical Requirement, or to add a new Technical Category to the appropriate Technical Requirement.

Define Service Categories

Help/Instructions

In this step, you must define the Service Categories and any Technical Requirements that are necessary for this ITQ.

Create - Technical Requirement

Technical Requirement Name and Technical Requirement Description fields are mandatory. After entering data in these fields, click the Add Technical Requirement button. Then, you may proceed to the Technical Categories section by clicking on the "Add_TC" button in the appropriate Technical Requirements line in the Technical Requirements list. Use the "Back To Service Categories" button to go back to the Service Categories Section.

Service Category Title: Consulting Services - IT Project Management

Tech Requirement Name:

Tech Requirement Desc:

Back To Service Categories **Add Technical Requirement**

Available - Technical Requirement

Tech Req Name	Tech Req Description
No Technical Requirements found for Service Category ID: 134!	

Continue

 **TIP:** Use the “Copy” and “Paste” method as previously described for quick insertion of the Technical Requirement(s).

Button Descriptions

BUTTON	ACTION
	Redirects you to back to <i>Create - Service Category</i>
	Adds the entered data into the ITQ

- 4) Select the **Add Technical Requirement** button.

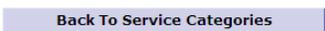
Create - Technical Requirement

Technical Requirement Name and Technical Requirement Description fields are mandatory. After entering data in these fields, click the Add Technical Requirement button. Then, you may proceed to the Technical Categories section by clicking on the "Add_TC" button in the appropriate Technical Requirements Line in the Technical Requirements List. Use the "Back To Service Categories" button to go back to the Service Categories Section.

Service Category Title: Consulting Services - IT Project Management

Tech Requirement Name:

Tech Requirement Desc:

Notice that the Technical Requirement name and Description is displayed in the Available – Technical Requirement section.

- 5) Repeat the above steps as necessary until all Technical Requirements have been added.
- a) Be aware that your Technical Requirements may not display within the Available – Technical Requirement area in the same order that you entered them.
- 6) Select the **Continue** button.
- 7) You are returned to the **Edit ITQ Menu** page and the checkbox next to Step 5 is marked as completed.

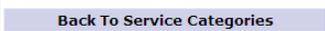
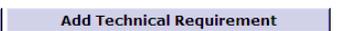
Create - Technical Requirement

Technical Requirement Name and Technical Requirement Description fields are mandatory. After entering data in these fields, click the Add Technical Requirement button. Then, you may proceed to the Technical Categories section by clicking on the "Add_TC" button in the appropriate Technical Requirements Line in the Technical Requirements List. Use the "Back To Service Categories" button to go back to the Service Categories Section.

Service Category Title: Consulting Services - IT Project Management

Tech Requirement Name:

Tech Requirement Desc:

Available - Technical Requirement

Tech Req Name	Tech Req Description	Delete	Edit	Add_TC
Consulting Services - IT Project Management	Includes any services to assist agencies govern, manage, measure, and resource their IT projects or portfolio of IT projects to improve overall business performance and support and maintain Commonwealth and industry project management standards and methodologies.			



Scenario 3: Adding one or more Technical Categories to a Technical Requirement

If you are already on the Create – Technical Requirement screen, skip to instructional step 3.

From the Create – Service Category screen:

- 1) Scroll down to the Available – Service Category area.
- 2) For the applicable Service Category, select the Add_TR button.

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP

Title:
 Description:

Add Service Category

Available - Service Category

Title	Description	Comments Required			
Boating, Kayaking & Canoeing Equipment	Including but not limited to canoes, kayaks, paddle boats, canoe paddles, kayak paddles, kayak specific life jackets, dry bags, paddle floats, towropes, life jackets, any NON MOTORIZED equipment.	Y	Delete	Edit	Add_TR
Camping, Backpacking & Hiking Equipment	Including but not limited to tents, sleeping bags, trekking poles, backpacks, backpacking stoves, cook stoves, sleeping pads, outdoor cooking pots-pans-utensils, water filters.	Y	Delete	Edit	Add_TR
Consulting Services - IT Project Management	Include, but are not limited to: any services that assist agencies to govern, manage, measure, and resource their IT projects or portfolio of IT projects to improve overall business performance and support and maintain Commonwealth and industry project management standards and methodologies.	Y	Delete	Edit	Add_TR
Consulting Services - IV&V	Include, but are not limited to: requirements validation and tracing, milestone review, metrics analysis, test witnessing, site acceptance testing, defect investigation, vendor analysis and selection, quality assurance and management, reporting and documentation review for IT and telecommunications projects.	Y	Delete	Edit	Add_TR

Service category Boating, Kayaking & Canoeing Equipment added.

Continue

- 3) For the applicable Technical Requirement, select the Add_TC button.

This form is divided into two sections: Create – Technical Requirement Categories and Available – Technical Requirement Categories. Use the Create – Technical Requirement Categories section, when applicable, to enter the Technical Requirement’s Technical Category/ies to the ITQ.

When applicable, use the Available – Technical Requirement Categories section to delete a Technical Requirement Category that should no longer be associated with the Technical Requirement. The Available – Technical Requirement Categories section may also be used to edit a Technical Requirement Category.

Create - Technical Requirement

Technical Requirement Name and Technical Requirement Description fields are mandatory. After entering data in these fields, click the Add Technical Requirement button. Then, you may proceed to the Technical Categories section by clicking on the "Add_TC" button in the appropriate Technical Requirements Line in the Technical Requirements List. Use the "Back To Service Categories" button to go back to the Service Categories Section.

Service Category Title: Consulting Services - IT Project Management

Tech Requirement Name:
 Tech Requirement Desc:

Back To Service Categories **Add Technical Requirement**

Available - Technical Requirement

Tech Req Name	Tech Req Description			
Consulting Services - IT Project Management	Includes any services to assist agencies govern, manage, measure, and resource their IT projects or portfolio of IT projects to improve overall business performance and support and maintain Commonwealth and industry project management standards and methodologies.	Delete	Edit	Add_TC

Continue

- 4) The **Define Service Categories** page re-displays; however, the “Create” component is now for Technical Requirement Categories.
- 5) Complete the following required field:
 - Tech Category Name
- 6) Complete the following optional field, if desired:
 - Tech Category Desc

Create - Technical Requirement Categories

Technical Category Name is mandatory and Technical Category Description is optional. After entering data in these fields, click the Add Technical Category button. Use the "Back To Technical Requirements" button to go back to the Technical Requirements Section.

Tech Requirement Name: Consulting Services - IT Project Management

Tech Category Name:

Tech Category Desc:

Back To Technical Requirements **Add Technical Category**

Available - Technical Requirement Categories

Tech Category Name	Tech Category Description
No Technical Categories found for Technical Requirements ID: 54!	

Continue

 **TIP:** Use the “Copy” and “Paste” method as previously described for quick insertion of the Technical Category/ies.

Button Descriptions

BUTTON	ACTION
Back To Technical Requirements	Redirects you to back to <i>Create - Technical Requirement</i>
Add Technical Category	Adds the entered data into the ITQ

- 7) Select the **Add Technical Category** button.

Create - Technical Requirement Categories

Technical Category Name is mandatory and Technical Category Description is optional. After entering data in these fields, click the Add Technical Category button. Use the "Back To Technical Requirements" button to go back to the Technical Requirements Section.

Tech Requirement Name: Consulting Services - IT Project Management

Tech Category Name:

Tech Category Desc:

Back To Technical Requirements **Add Technical Category**

Notice that the **Technical Category name is displayed in the Available – Technical Requirement Categories section.**

- 8) Repeat the above steps as necessary until all Technical Categories have been added.
 - a) Be aware that your Technical Requirement Categories may not display within the *Available – Technical Requirement Categories* area in the same order that you entered them.
- 9) Select the **Continue** button.
- 10) You are returned to the **Edit ITQ Menu** page and the checkbox next to Step 5 is marked as completed.

Create - Technical Requirement Categories

Technical Category Name is mandatory and Technical Category Description is optional. After entering data in these fields, click the Add Technical Category button. Use the "Back To Technical Requirements" button to go back to the Technical Requirements Section.

Tech Requirement Name: Consulting Services - IT Project Management

Tech Category Name:

Tech Category Desc:

Available - Technical Requirement Categories

Tech Category Name	Tech Category Description		
Business Requirements		<input type="button" value="Delete"/>	<input type="button" value="Edit"/>

IN SUMMARY:

- ✓ There is no set number of Service Categories for an ITQ Contract – how many you have is specific to your ITQ.
- ✓ A Service Category may or may not have one or more Technical Requirements.
- ✓ A Technical Requirement may or may not have one or more Technical Categories.
- ✓ The Service Category/ies, and if applicable, Technical Requirement(s) and/or Technical Categories, are established in the Statement of Work when it is developed. In Step 5, Define Service Categories, you are simply incorporating them into the ITQ Contract on the website.
- ✓ Since the Service Categories, Technical Requirements, and/or Technical Categories already exist, use the “Copy” and “Paste” method when adding them to the website rather than typing the information ‘from scratch’.
- ✓ After the first Service Category has been added to the website, there is no specific order that the remaining entries of Service Categories (and Technical Requirements and/or Technical Categories, if applicable) are to be completed in.
- ✓ Once added, the Service Categories (and Technical Requirements and/or Technical Categories, if applicable) may not display within the *Available – Service Categories, et. al.* areas in the same order in which they were entered.

Step 6 – Client Reference Survey Questions

The following tasks are used to incorporate survey questions for client references into the ITQ Contract on the website.

IMPORTANT NOTE: This step is only applicable if “Yes” was selected for the question “Are references required for this ITQ?” when the ITQ Header was created.

ITQ Header

SRM Contract #: 4400987654 ITQ Name: ITQ Development EUP

Effective Date: 10/3/2011 Expiration Date: 10/2/2012

Enrollment Open Date: 10/3/2011 Enrollment Close Date: 10/2/2012

Are counties required for this ITQ? Yes

Are references required for this ITQ? **Yes** enter # of References: 2

From the Edit ITQ Menu page:

- 1) Select the **Step 6. Client Reference Survey Questions** button.

Edit ITQ Menu	
Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input checked="" type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input checked="" type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions ←	<input type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
Back to Select ITQ	

- 2) The **Client Reference Survey Questions** page displays.

This form is divided into two sections: Create – Client Reference Survey Questions and Available – Client Reference Survey Questions. Use the Create – Client Reference Survey Questions section to enter the survey questions for the ITQ. When applicable, use the Available – Client Reference Survey Questions section to delete a Survey Question that should no longer be associated with the contract. The Available – Client Reference Survey Questions section may also be used to edit a Survey Question.

Client Reference Survey Questions

Help/Instructions

In this step, you must create and weight the questions for the Client Reference Survey Form.

Create - Client Reference Survey Questions

SRM Contract #: 4400987654

Contract Name: ITQ Development EUP

Question #:

Question Weight (%):

Enter Question:

Available - Client Reference Survey Questions

No questions entered for SRM Contract Number: 4400987654!

- 3) Complete the following required fields:

- a) Question #
 - Enter the number of the question.
- b) Question Weight (%)
 - Enter the weight percentage that is being assigned to the question.
- c) Enter Question
 - Insert the survey question for the client reference.

Question #:

Question Weight (%):

Enter Question:

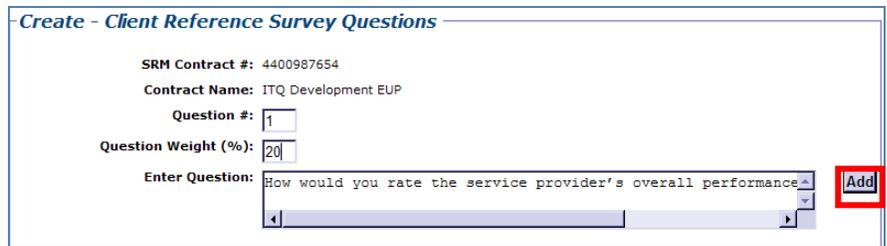
IMPORTANT NOTE: The combined weight of all questions must equal 100%.

 **TIP:** The simplest way to enter the questions is to use “Copy” and “Paste” rather than typing it from scratch. While leaving the ITQ Website open at the *Create – Client Reference Survey Questions* page, locate the document that contains your survey questions.

In the document with the survey questions, highlight the first question to select it. “Right-click” on your mouse, and then choose **Copy** on the menu that displays. Go back to the window containing the ITQ website and select the *Enter Question* field. “Right-click” on your mouse, and this time choose **Paste** on the menu that displays. The information is now inserted. You may also use this process to complete the *Question #* and *Question Weight (%)* fields, but keying in the numbers is equally fast.

Continue following the above process until all survey questions have been established.

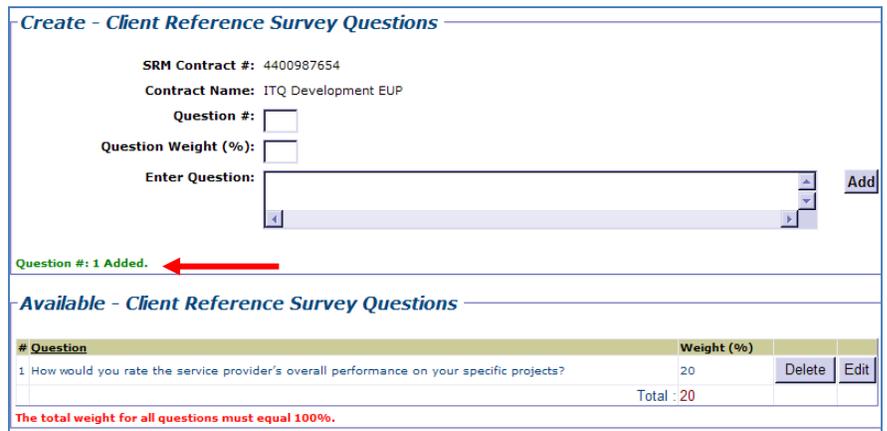
- 4) Select the **Add** button.



Notice that the *Question*, *number*, and the *question's weight assignment* are displayed in the *Available – Client Reference Survey Question* section.

Notice a confirmation message is displayed in green stating that the information was successfully added.

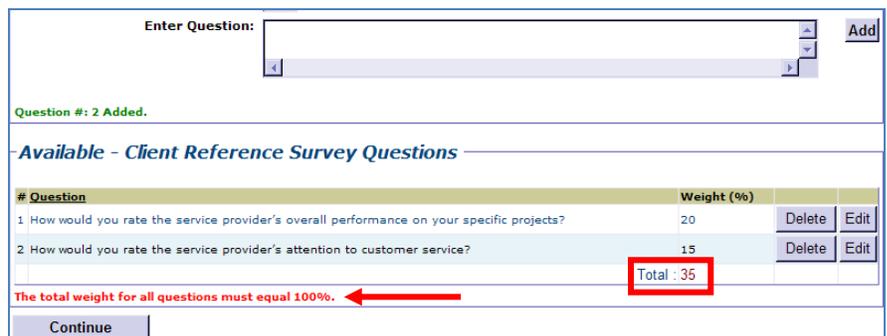
- 5) Repeat the above steps as necessary until all Survey Questions have been added.



# Question	Weight (%)	Delete	Edit
1 How would you rate the service provider's overall performance on your specific projects?	20	Delete	Edit
Total : 20			

The total weight for all questions must equal 100%.

- 6) Monitor the Weight total as you are adding each question, as the combined weight of all questions must equal 100%.



# Question	Weight (%)	Delete	Edit
1 How would you rate the service provider's overall performance on your specific projects?	20	Delete	Edit
2 How would you rate the service provider's attention to customer service?	15	Delete	Edit
Total : 35			

The total weight for all questions must equal 100%.

Continue

- 7) Select the **Continue** button.

Enter Question:

Question #: 10 Added.

Available - Client Reference Survey Questions

#	Question	Weight (%)	Delete	Edit
1	How would you rate the service provider's overall performance on your specific projects?	20	Delete	Edit
2	How would you rate the service provider's attention to customer service?	15	Delete	Edit
3	How would you rate the service provider's ability to provide accurate budget estimates?	10	Delete	Edit
4	How would you rate the service provider's ability to stay within the agreed upon project budget?	15	Delete	Edit
5	How would you rate the service provider's on scheduling and time line aspects of your specific project, were all deadlines met?	10	Delete	Edit
6	How would you rate the service provider's performance on proving adequate staffing?	5	Delete	Edit
7	How would you rate the service provider's communication in terms of project update?	5	Delete	Edit
8	How would you rate the service provider's planning and delivery skills?	5	Delete	Edit
9	How would you rate the service provider's project management skills and key personnel assigned on your project?	5	Delete	Edit
10	How would you rate the service provider's confidence in their approach and capabilities?	10	Delete	Edit
		Total : 100		

- 8) You are returned to the **Edit ITQ Menu** page.

The checkbox next to Step 6 has been marked as completed.

Edit ITQ Menu

Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input checked="" type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input checked="" type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input checked="" type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
<input type="button" value="Back to Select ITQ"/>	

Step 7 – Part III – Open Enrollment Process

The following tasks are used to upload the Open Enrollment Process document into the ITQ Contract on the website.

From the Edit ITQ Menu page:

- 1) Select the **Step 7. Part III – Open Enrollment Process** button.

Edit ITQ Menu	
Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input checked="" type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input checked="" type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input checked="" type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
Back to Select ITQ	

- 2) The **Part III – Open Enrollment Process** page displays.

This form is divided into two sections: Upload – Open Enrollment Process and Available – Open Enrollment Process. Use the Upload – Open Enrollment Process section to upload the contract’s Open Enrollment Process document to the ITQ. It is required that this document be uploaded in two different document types: PDF and HTML. When appropriate, use the Available – Open Enrollment Process section to delete a document that should no longer be associated with the contract.

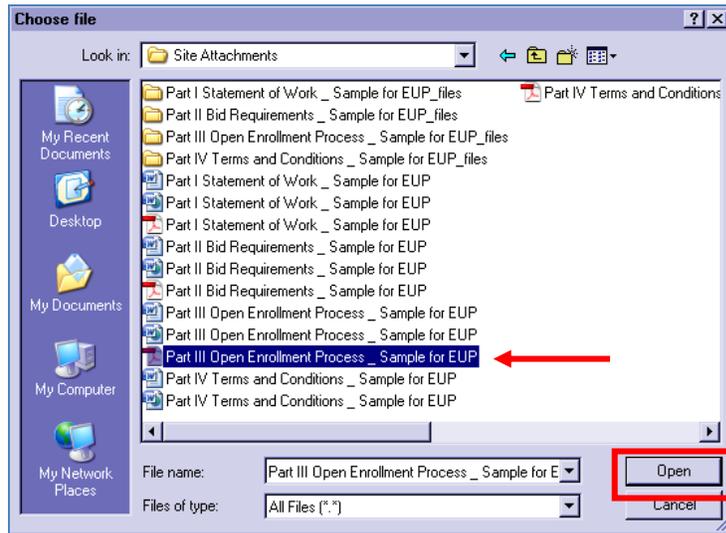
Part III - Open Enrollment Process
<p>Help/Instructions</p> <p><i>In this step, you must upload Part III – Open Enrollment Process for this ITQ.</i></p> <p><i>This step requires uploading two separate file types for the same document. One is a PDF and the other must be an HTML document. You should convert your WORD document to PDF and also save it as an HTML file using the instructions below:</i></p> <p><i>To convert to PDF: There are several online tools for converting a WORD document to a PDF. One is located here.</i></p> <p><i>To convert to HTML: Click Here for Step by Step Instructions</i></p>
<p>Upload - Open Enrollment Process</p> <p>SRM Contract #: 4400987654 Contract Name: ITQ Development EUP Document Location: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/></p>
<p>Available - Open Enrollment Process</p> <p>No Open Enrollment Process found for Contract Number: 4400987654!</p> <p><input type="button" value="Continue"/></p>

- 3) Select the **Browse** button to upload the Open Enrollment Process document in two different file types:

- PDF
- HTML

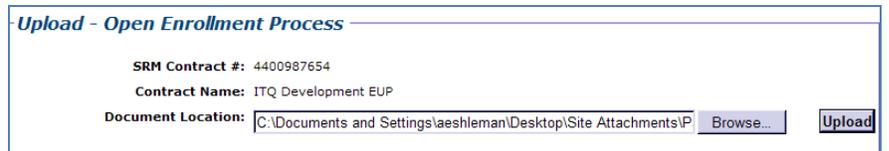


- 4) Locate the applicable file.
- 5) Select (highlight) the applicable file.
- 6) Select the **Open** button.



The file path has been inserted into the Document Location field.

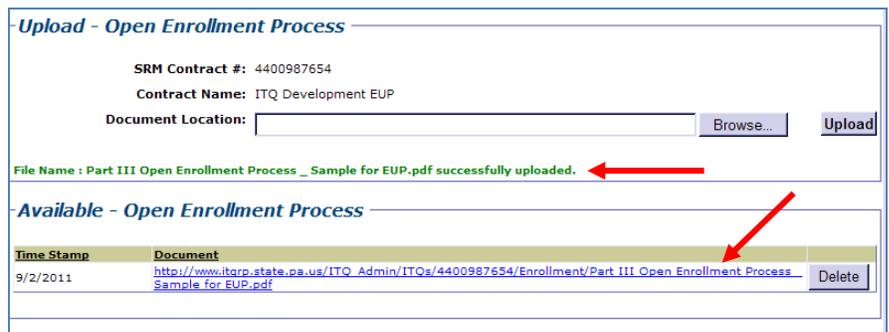
- 7) Select the **Upload** button.



A confirmation message is displayed in green stating that the file was successfully uploaded.

The file is displayed as a hyperlink in the Available – Open Enrollment Process section.

- 8) Repeat the above steps with the remaining file [type].



- 9) Select both links to validate that they open correctly.
 - a) If one or both do not, delete the file(s) and repeat the upload process.
- 10) Select the **Continue** button.

Upload - Open Enrollment Process

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP

Document Location:

File Name : Part III Open Enrollment Process _ Sample for EUP.htm successfully uploaded.

Available - Open Enrollment Process

Time Stamp	Document	Delete
9/2/2011	http://www.itqrp.state.pa.us/ITQ_Admin/ITQs/4400987654/Enrollment/Part_III_Open_Enrollment_Process_Sample_for_EUP.pdf	<input type="button" value="Delete"/>
9/2/2011	http://www.itqrp.state.pa.us/ITQ_Admin/ITQs/4400987654/Enrollment/Part_III_Open_Enrollment_Process_Sample_for_EUP.htm	<input type="button" value="Delete"/>

- 11) You are returned to the **Edit ITQ Menu** page.
The checkbox next to Step 7 has been marked as completed.

Edit ITQ Menu

Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input checked="" type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input checked="" type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input checked="" type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input checked="" type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview

Step 8 – Part IV – Terms & Conditions

The following tasks are used to upload the Terms & Conditions into the ITQ Contract on the website.

From the Edit ITQ Menu page:

- 1) Select the **Step 8. Part IV – Terms & Conditions** button.

Edit ITQ Menu	
Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input checked="" type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input checked="" type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input checked="" type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input checked="" type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions 	<input type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
Back to Select ITQ	

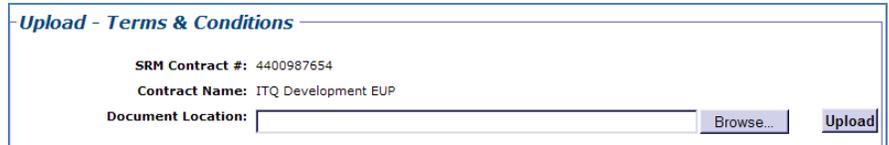
- 2) The **Part IV – Terms & Conditions** page displays.

This form is divided into two sections: Upload – Terms & Conditions and Available – Terms & Conditions. Use the Upload – Terms & Conditions section to upload the contract's Terms and Conditions document to the ITQ. It is required that this document be uploaded in two different document types: PDF and HTML. When appropriate, use the Available – Terms & Conditions section to delete a document that should no longer be associated with the contract.

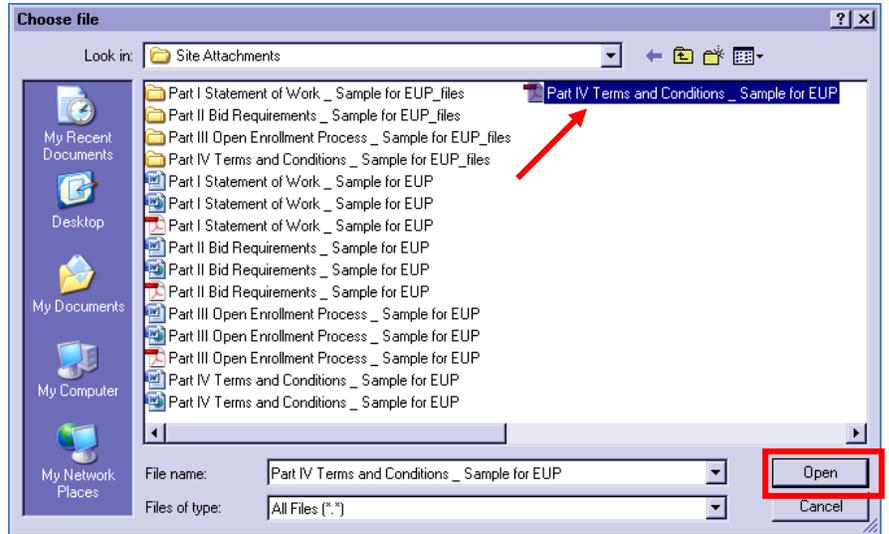
Part IV – Terms & Conditions
<p>Help/Instructions</p> <p><i>In this step, you must upload Part IV – Terms & Conditions for this ITQ.</i></p> <p><i>This step requires uploading two separate file types for the same document. One is a PDF and the other must be an HTML document. You should convert your WORD document to PDF and also save it as an HTML file using the instructions below:</i></p> <p><i>To convert to PDF: There are several online tools for converting a WORD document to a PDF. One is located here.</i></p> <p><i>To convert to HTML: Click Here for Step by Step Instructions</i></p>
<p>Upload - Terms & Conditions</p> <p>SRM Contract #: 4400987654 Contract Name: ITQ Development EUP</p> <p>Document Location: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/></p>
<p>Available - Terms & Conditions</p> <p>No Terms & Conditions found for SRM Contract Number: 4400987654!</p> <p><input type="button" value="Continue"/></p>

- 3) Select the **Browse** button to upload the Terms & Conditions document in two different file types:

- PDF
- HTML



- 4) Locate the applicable file.
 5) Select (highlight) the applicable file.
 6) Select the **Open** button.



The file path has been inserted into the Document Location field.

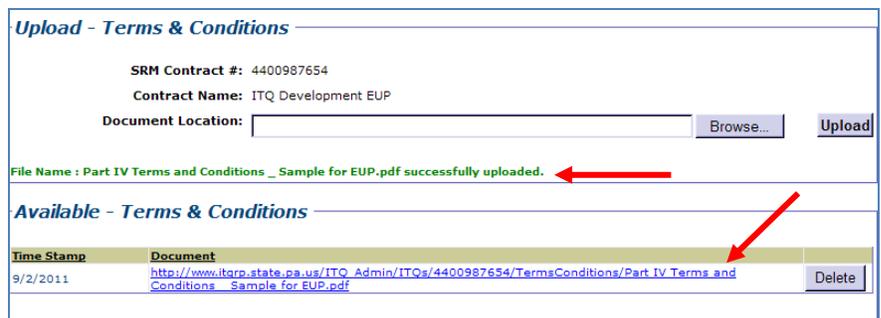
- 7) Select the **Upload** button.



A confirmation message is displayed in green stating that the file was successfully uploaded.

The file is displayed as a hyperlink in the Available – Terms & Conditions section.

- 8) Repeat the above steps with the remaining file [type].



- 9) Select both links to validate that they open correctly.
 - a) If one or both do not, delete the file(s) and repeat the upload process.
- 10) Select the **Continue** button.

Upload - Terms & Conditions

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP

Document Location:

File Name : Part IV Terms and Conditions _ Sample for EUP.htm successfully uploaded.

Available - Terms & Conditions

Time Stamp	Document	
9/2/2011	http://www.itqrp.state.pa.us/ITQ_Admin/ITQs/4400987654/TermsConditions/Part IV Terms and Conditions _ Sample for EUP.pdf	Delete
9/2/2011	http://www.itqrp.state.pa.us/ITQ_Admin/ITQs/4400987654/TermsConditions/Part IV Terms and Conditions _ Sample for EUP.htm	Delete

- 11) You are returned to the **Edit ITQ Menu** page.
The checkbox next to Step 8 has been marked as completed.

Edit ITQ Menu

Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input checked="" type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input checked="" type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input checked="" type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input checked="" type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input checked="" type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview
<input type="button" value="Back to Select ITQ"/>	

Step 9 – Publish ITQ

The following tasks are used to preview and/or publish the ITQ Contract on the website.

From the Edit ITQ Menu page, to first preview the ITQ:

- 1) Select the **ITQ Preview** link located across from **Step 9. Publish ITQ** button.

Edit ITQ Menu	
Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input checked="" type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input checked="" type="checkbox"/> Service Categories/Technicals Entered
Step 6. Client Reference Survey Questions	<input checked="" type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input checked="" type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input checked="" type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview 
Back to Select ITQ	

- 2) The **ITQ Preview** page displays.
- 3) Review the information, selecting document links as applicable.
- 4) Use the vertical scrollbar to view additional information.

ITQ Preview	
ITQ Header	
SRM Contract #: 4400987654	ITQ Name: ITQ Development EUP
Effective Date: 12/1/2011	Expiration Date: 11/30/2012
Enrollment Open Date: 12/1/2011	Enrollment Close Date: 11/30/2012
Counties Required: Yes	# of References: 2
References Required: Yes	
Part I - Statement Of Work	
Document	
http://www.itqrp.state.pa.us/ITQ_Admin/ITQs/4400987654/WorkScope/Part I Statement of Work_Sample for EUP.htm	
http://www.itqrp.state.pa.us/ITQ_Admin/ITQs/4400987654/WorkScope/Part I Statement of Work_Sample for EUP.pdf	
Additional Required Documentation	
Document Name	
Insurance Certificate	
Financial Information	
Resume	

- 5) Continue reviewing information to ensure completeness and accuracy.

Part II - Bid Requirements

Document
http://www.itqp.state.pa.us/ITQ_Admin/ITQs/4400987654/QualificationRequirements/Part II Bid Requirements_Sample for EUP.pdf
http://www.itqp.state.pa.us/ITQ_Admin/ITQs/4400987654/QualificationRequirements/Part II Bid Requirements_Sample for EUP.htm

Client Reference Survey Questions

#	Question	Weight (%)
1	How would you rate the service provider's overall performance on your specific projects?	20
2	How would you rate the service provider's attention to customer service?	15
3	How would you rate the service provider's ability to provide accurate budget estimates?	10
4	How would you rate the service provider's ability to stay within the agreed upon project budget?	15
5	How would you rate the service provider's on scheduling and time line aspects of your specific project, were all deadlines met?	10
6	How would you rate the service provider's performance on proving adequate staffing?	5
7	How would you rate the service provider's communication in terms of project update?	5
8	How would you rate the service provider's planning and delivery skills?	5
9	How would you rate the service provider's project management skills and key personnel assigned on your project?	5
10	How would you rate the service provider's confidence in their approach and capabilities?	10

Part III - Open Enrollment Process

Document
http://www.itqp.state.pa.us/ITQ_Admin/ITQs/4400987654/Enrollment/Part III Open Enrollment Process_Sample for EUP.pdf
http://www.itqp.state.pa.us/ITQ_Admin/ITQs/4400987654/Enrollment/Part III Open Enrollment Process_Sample for EUP.htm

- 6) Select the **Continue** button.

Part III - Open Enrollment Process

Document
http://www.itqp.state.pa.us/ITQ_Admin/ITQs/4400987654/Enrollment/Part III Open Enrollment Process_Sample for EUP.pdf
http://www.itqp.state.pa.us/ITQ_Admin/ITQs/4400987654/Enrollment/Part III Open Enrollment Process_Sample for EUP.htm

Part IV - Terms & Conditions

Document
http://www.itqp.state.pa.us/ITQ_Admin/ITQs/4400987654/TermsConditions/Part IV Terms and Conditions_Sample for EUP.pdf
http://www.itqp.state.pa.us/ITQ_Admin/ITQs/4400987654/TermsConditions/Part IV Terms and Conditions_Sample for EUP.htm

Service Categories/Technicals

Service Category

- Boating, Kayaking & Canoeing Equipment
- Camping, Backpacking & Hiking Equipment
- Consulting Services - IT Project Management
- Consulting Services - IV&V

Continue

- 7) You are returned to the **Edit ITQ Menu** page.
- 8) Select the **Step 9. Publish ITQ** button.

Edit ITQ Menu	
Step 1. Edit ITQ Header	<input checked="" type="checkbox"/> ITQ Header Uploaded
Step 2. Part I - Statement of Work	<input checked="" type="checkbox"/> Statement of Work Uploaded
Step 3. Additional Required Documentation	<input checked="" type="checkbox"/> Additional Documents Specified
Step 4. Part II - Bid Requirements	<input checked="" type="checkbox"/> Bid Requirements Uploaded
Step 5. Define Service Categories	<input checked="" type="checkbox"/> Service Categories/Technical Entered
Step 6. Client Reference Survey Questions	<input checked="" type="checkbox"/> Client Reference Questions Created
Step 7. Part III - Open Enrollment Process	<input checked="" type="checkbox"/> Open Enrollment Process Uploaded
Step 8. Part IV - Terms & Conditions	<input checked="" type="checkbox"/> Terms & Conditions Uploaded
Step 9. Publish ITQ	<input type="checkbox"/> ITQ Published ITQ Preview

Back to Select ITQ

- 9) The **Publish ITQ** page displays.

Publish ITQ

Help/Instructions

In this step, you will publish the ITQ. However, a Request to Advertise must be completed on eMarketplace and the Solicitation # entered below before this ITQ can be Published.

Publish ITQ

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP
 Solicitation #:

- 10) Enter the applicable Solicitation number in the **Solicitation #** field.
- 11) Select the **Check Solicitation #** button.

Publish ITQ

Help/Instructions

In this step, you will publish the ITQ. However, a Request to Advertise must be completed on eMarketplace and the Solicitation # entered below before this ITQ can be Published.

Publish ITQ

SRM Contract #: 4400987654
 Contract Name: ITQ Development EUP
 Solicitation #:

12) The system will search eMarketplace for the Request to Advertise, and return the result.

13)

Publish ITQ

Help/Instructions

In this step, you will publish the ITQ. However, a Request to Advertise must be completed on eMarketplace and the Solicitation # entered below before this ITQ can be Published.

Publish ITQ

SRM Contract #: 4400987654
Contract Name: ITQ Development EUP
Solicitation #:

**Request to Advertise Number, 4400987654, was not found.
ITQ can not be Published!**