Welcome!
Introductions
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
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

- 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

- 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

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

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

- 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

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
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)

<table>
<thead>
<tr>
<th>No contract currently exists; a competitive solicitation process is required</th>
<th>Supplier submits a bid for a specific item with specific criteria</th>
<th>COPA awards based on low price</th>
</tr>
</thead>
</table>

**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)

| No contract currently exists; a competitive solicitation process is required | Supplier submits a technical proposal, as well as cost information for a specific item with criteria offered by supplier | COPA awards based on a variety of criteria and is considered “best value”

Best & Final Offers may be sought |

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
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

*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.
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.
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
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
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)
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
Accessing the Sourcing Wizard

- Select **Purchasing**
- Left navigation pane under – Create Documents
- Select **Carry Out Sourcing**
Assigning Sources of Supply

- 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)

- 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
Step 1 (Select Requisition)

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

- 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
Select the NEXT button to proceed to Step 2
Step 2 (Assign Source of Supply)

- There are several processing options in this step
  - Select the applicable line item(s)
  - Choose the appropriate command button
### Step 2 (Assign Source of Supply)

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.
### Step 3 (Review Drafts)

- Review and process the selected draft solicitation document.
Step 3 (Review Drafts)

- Select the applicable *Transaction Type* for the document

- Edit the defaulted name of the solicitation
Step 3 (Review Drafts)

- 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
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.
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.
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
The draft document generates and the “Edit RFx” screen displays
• 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
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

- 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

• Enter a name for the bid in the Bid Description field

• Select the Publication Type
  - Public
  - Restricted
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)
  – Space or Dash
  – Noun that describes the item or Contract Title (no abbreviations)

• Example:
  – 2517 Radial Tires
Editing a Draft RFx

- 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

- 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

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

*Create and Maintain User Address - Appendix C
- EUP located on DGS BOP Training Website
• 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
Optional Questions may be added by selecting the ADD QUESTION button (DGS/BOP functionality)
To view the optional Questions, select the match code next to the Group field

- Choose the Question to be added

  - Select the OK button
• The selected Question is pulled into the Group field
  – Select the ADD button

• The selected Question is included on the tab
• 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
To add a Note, select the applicable category

- Type or paste the text into the box and select the OK button
• Repeat the process to add an Internal Note
• If applicable, utilize the CLEAR button to delete an existing note
Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx.

**Notes**
- Category: Tendering text
- Description: -Empty-
- Category: Internal Note
- Description: -Empty-

**Attachments**
- Category: External Note
- Description: -Empty-

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.)
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.
Label attachment appropriately, (users will need to label the attachments one through nine, as 01 through 09 as indicted 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) 61XXXXXXXX or RFP (IFB) “Title of RFP (IFB) Project”
06 – Bid Tab
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
- 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
• **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.
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.
• 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
• 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

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

- 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

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

Caution: Never use FINISH WITH DEFAULTS; each question should always be responded to individually.
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.
• Select the SAVE button at any time to hold and protect your work
The message “Document held” displays after saving

- Select the EDIT button to continue viewing/responding to questions
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.
The Preview tab contains three documents (reports) which are automatically generated as the questions on the Dialog tab are completed.
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• 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.
- Identifies, per clause, all fill-in responses, as well as any edits that were made to the document language.
• Identifies, per field, the responses (or lack of) which were entered for each question.
The RELEASE button becomes available after all questions have been reviewed/responded to.
• 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
• Select the EDIT button in SRM
  – The documents are attached to the Notes and Attachments sub-tab on the RFx Information tab
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
• 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
• Select the Approval Tab to review the levels of approval required
Select the Tracking Tab to review the History, Status, Version Overview, and/or Change Documents of the Solicitation.
Publishing the RFx

• Select the CHECK button to view and resolve any errors
• Select the PUBLISH button to send the RFx document through approval workflow
Exercise 2 – Create a Document Builder Document

http://eniesrwda01.state.pa.us/gm/folder-1.11.97451?mode=EU

• From the dropdown, select Simulation
Advertising Solicitations
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 and choose the “Help” link.
Bidders Response
Bidders Response

- Bidder logs into PA Supplier Portal, selects the bidder tab
- Selects the bid they are interested in responding to
When the bid displays, the bidder must select the REGISTER button.
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.
An error message will display stating that the Mandatory Questions must be completed.
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.
• 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
• 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

- The bidder can then select the Summary tab to review the information from the Bid Response
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 65xxxxxxxx submitted.”
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)
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
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)
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)

- Search for the solicitation in the POWL
- Display the solicitation to review
Select the RESPONSES AND AWARDS button
Open the Responses (Responses Activity tab)

- 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)

- Select a link to view the quotation document
The Response Comparison tab provides the ability to compare the submitted responses to one another.
• Select the COMPARE ALL RESPONSES button to see an overview of the responses side by side
The Item Details area displays information pertaining to the solicitation line items.
The bid response details for each bidder are displayed side by side.
– 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

- 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.
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.
• 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)

- 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

- 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

- Select the ACCEPT or REJECT button as applicable
Accept a Response – Make Award

- 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
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

- Messages display indicating that the response was accepted
- The status of the supplier’s quotation changes to “Awaiting Approval”
Accept a Response

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

- 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

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

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

The contract transaction types display for selection
Create an Award

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

- A message displays with the draft contract number
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 and select the draft Contract in the Purchasing POWL
• The draft Contract displays
• Select the EDIT button to begin making changes
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
• Error messages pertaining to the draft contract’s incomplete fields may display
  – Review and address as required
• 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

- The Header Tab consists of the following sub-tabs:
  - Basic Data
  - Condition
  - Hierarchy
  - Notes and Attachments
  - Output
• Review the defaulted information for accuracy and completeness
  – Make edits to any information, if necessary
  – Complete any open fields, as applicable
An Alert Expiration can be set for the Validity Period. This Alert Expiration will send out a notification to the Responsible Employee when set.

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.
The Hierarchy sub-tab is used by DGS to link statewide contracts together in a hierarchical structure
As needed, add any other header level text or attachments
Items Tab – Item Overview

- 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
• The Items Tab consists of the following sub-tabs:
  – General Data
  – Conditions
  – Notes and Attachments
  – Approval Preview
  – Payment
  – Releases
• Review the defaulted information for accuracy and completeness
Item Tab – Conditions Sub-tab

- Review the information on the Conditions sub-tab for accuracy
As needed, add any other item level text
• The Payment Terms and Incoterm fields will populate based off of the supplier information
  – Terms must be in compliance with DGS procurement policies
The Release sub-tab displays procurement documents which have been released against the selected line item.
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

- Conditions tab displays information on the pricing for each line item and the validity period for that condition.
• The Approval tab is functional in SRM 7.0 and shows the levels of approval the procurement document must achieve
The Tracking tab is comprised of various types of information such as:

- Document History
- Status
- Versions
- Change Documents
Release the Contract

- 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://eniesrwda01.state.pa.us/gm/folder-1.11.97456?mode=EU

- From the dropdown, select Simulation
Editing a Released Contract
## Editing a Released Contract

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

<table>
<thead>
<tr>
<th>Central Contract Number</th>
<th>Central Contract Name</th>
<th>Status</th>
<th>Purchasing Organization</th>
<th>Supplier</th>
<th>Valid From</th>
<th>Valid To</th>
<th>Hierarchy</th>
</tr>
</thead>
<tbody>
<tr>
<td>4400913442</td>
<td>CKA RFx Demo 1-2-14</td>
<td>Released</td>
<td>COPA Purchasing Organization</td>
<td>CIVICORP CORPORATION</td>
<td>01/01/2014</td>
<td>01/01/2016</td>
<td></td>
</tr>
</tbody>
</table>
• Select the EDIT button to begin making changes
• 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
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:

• 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
1. How many steps are in the Carry Out Sourcing Wizard?

   a. 3
   b. 4
   c. 5
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

1. Agency Prepares shopping cart
2. Agency completes online Source Justification Form (SJF) (includes approvals)
3. Agency submits electronic SJF form and fully approved Shopping Cart to DGS or OA/OIT (if IT related)
4. Form is received by Commodity Manager and is assigned to the appropriate Commodity Specialist (CS)
5. CS reviews request; completes Determination Summary; attaches to request on eMarketplace with their approval/disapproval
6. SJF routes for DGS or OIT approvals
7. CS processes Supplier Price Request (SPR) and creates Purchase Order (PO) for Sole Source Board release & approval process
8. Upon final release by SS Board, the SS Coordinator will go back in system and update form with pertinent award information
9. Agency will receive an email stating the SJF has been fully approved
10. Dept. of State will receive an email containing PO/Supplier information
11. DGS or OA/OIT issues the PO to the Supplier

Rejected, Shopping Cart is returned

Accepted
Appendix B: Sole Source Service

Sole Source Services Process Map

- Agency completes online Source Justification Form (SJF) and Supplier Price Request (SPR) in SRM (attaches supplier quotes and other pertinent documentation; includes approvals)
- Agency submits electronic SJF form to DGS/OIT (if IT related)
- Form is received by Commodity Manager and assigned to appropriate Commodity Specialist
- Commodity Specialist reviews request, completes Determination Summary and attaches to request on eMarketplace with their approval/disapproval
- Accepted

- SJF routes for DGS/OIT approvals (depending on $ amount)
- Agency will receive e-mail stating fully approved
- Agency may process PO utilizing the follow on document from the SPR
- Dept of State will receive e-mail PO/Supplier information
- Rejected, email notification

Accepted
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

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

• 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

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

Note:
• The (Assign Other Company Address) will update the company address and replicate to SRM from SAP R/3, this will take approximately 15 minutes.
- 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

- If no suitable address is found, you will need to submit a ServiceNow (remedy) ticket via your Helpdesk to “Assign New Company Address.” When submitting the ticket, provide complete address information that needs to be added.
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
Thank you!

SRM 7.0
Creating & Maintaining Solicitations (RFx) & Contracts
Thank you!