

SUBMITTING AND MANAGING BIDS AND OVERVIEW OF CONTRACT MANAGEMENT PR235

STATE INFORMATION TECHNOLOGY



End User Training Columbia, SC Fall 2013 Version 2 – October 16, 2013

Welcome and Introductions



Welcome to SCEIS Bidding Processes

- Introductions
- Ø Sign-in sheet
- Restrooms
- Breaks
 Bre
- Parking Lot
- Complete course evaluation at end of class

Classroom Logistics



- Classroom etiquette
 - Cell phones off/silence
 - No side conversations
- Feel free to ask questions
- No email or internet usage during class except at breaks

Course Learning Objectives



- Open completion of this course, you should be able to:
 - Describe Complex/Small Purchases.
 - Describe the Procurement Process Flow.
 - Redistribute Workload.
 - Create RFx.
 - Complete RFx..
 - Create a Document using Document Builder.

Course Learning Objectives



- Output Upon completion of this course, you should be able to:
 - Edit a document using MS Word.
 - Publish an RFx.
 - Publish an Amendment.
 - Create Surrogate Bid.
 - Accept Bids and Create Purchase Order and/or Contract .

Course Learning Objectives cont.



- Open completion of this course, you should be able to:
 - Edit contract data .
 - Use Document Builder to create award documents.
 - Post award documents to the website.
 - Activate web posting date/time.
 - Send E-mail notifications.
 - Understand when & how to close an RFx.

Course Map



- **Lesson** 1: Complex/Small Purchase RFx
- **Lesson 2:** Workload Redistribution
- **& Lesson 3:** Sourcing
- **Lesson** 4: Strategic Purchasing
- **Lesson** 5: Create Surrogate Bids
- Lesson 6: Evaluate & Accept Bid/Create PO & Contract
- **Lesson** 7: Maintain Contracts and Award Statements
- **Lesson** 8: Close RFx Transaction



LESSON 1: DIFFERENCES BETWEEN COMPLEX AND SMALL PURCHASES RFX

STATE INFORMATION TECHNOLOGY



Lesson 1 Learning Objectives



- Output Upon completion of this lesson, you should be able to:
 - Understand the definition of RFx.
 - Describe the difference between Small Purchase RFx and Complex RFx.





RFx is the SAP 7 term for the bidding transaction types equivalent to the methods of source selection referenced in the Code.

Small Purchases



Question:

When do I use SRM's bidding engine for Small Purchases?

Answer:

Buyers will use the bidding engine when the total value of the RFx is estimated to be greater than \$10,000 up to \$50,000. End result may be either a purchase order or a contract.

Complex Purchases



Question:

When do I use SRM's bidding engine for Complex Purchases?

Answer:

Buyers will use complex bidding when the total value of the RFx is estimated to be greater than \$50,000. End result will be a contract.

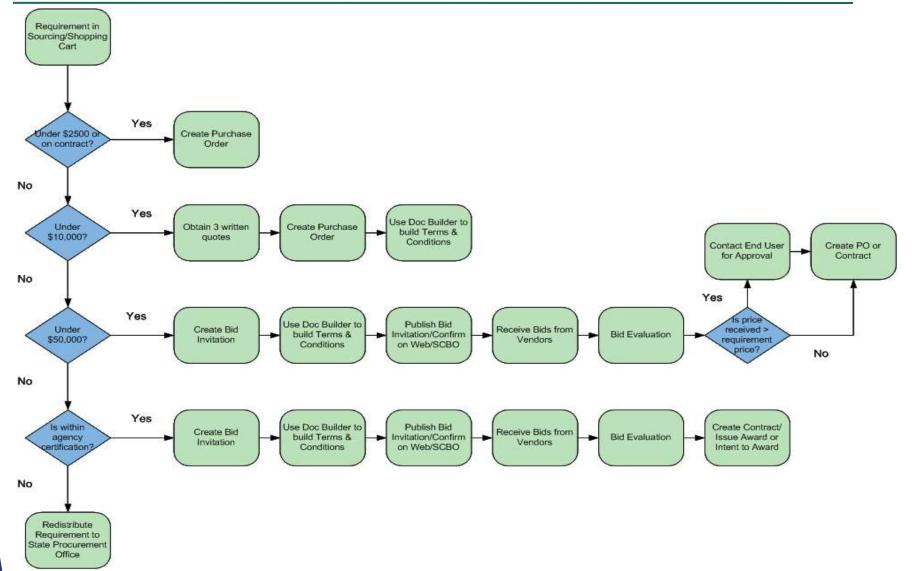
RFxs - Types



- You can create the following types of RFxs:
 - Best Value Bid
 - Fixed Price Bid
 - Invitation for Bid
 - RFQ Request for Qualification
 - Request for Information
 - RFP Request for Proposal
 - Small Purchase Only for bids \$50,000 and under

Complex Purchase RFx Process Flow





Lesson 1 Summary



You should now be able to:

- Define the term RFx.
- Describe the difference between Small Purchase RFx and Complex RFx.



LESSON 2: WORKLOAD REDISTRIBUTION

STATE INFORMATION TECHNOLOGY



Lesson 2 Learning Objectives



- Output Upon completion of this lesson, you should be able to:
 - Determine if a requisition will need to be redistributed to ITMO/MMO or another buyer.
 - Redistribute the requisition to ITMO/MMO or another buyer.

Redistribute Workload – SRM 5.0



Screenshot from SRM 5.0

Redistribution of Workloa	ad		
Find Documents			
Requirements	Purchase Orders	Bid Invitations	Contracts
Purch. Organization	Purchasing Group	Status	
SCEIS Purchasing Organization 💌	Vocational Rehabilitation	V AII V	
Product	Product Category	Vendor	
(Å	(A)		M
Delivery Date/ValidityPeriod/Submiss	ion Deadlne Document Number		
I	1 7		
Start Simple Search Reportin	g Workload		

Workload Redistribution



SAP					5	sarch Q + Log o
Back Finward y History Fr	evorites Personalize View Hel					Welcone: MMD Acquisition Manager
None RFx and Auctor	Strategic Purchasing	ZWW Buyer Application Wontor Purchasing		ate Contracts		
Werview Reports Servic	os Viap					
	Strategic Functioning + Overview	nw > Workload Redistribution				Full Screen Options •
lark Overview	SRM Application					
rategiu Sourcing						
ontract Management	0					Q
isiness Partner	Search for Documenta					-
ankload Redistribution	Document Types					
	Resurrene Search Undo Entries	rta [2] Status Purchasing Organization Purchasing Oroup: Document Number Detvery Date / Validity Pendo / Submission Deadline		In Process SCEIS Purchai ITWO - Acquis	ton Variager	
	Search Result : 3 Docume	inta				0
	Contraction of the second	SCES Purchasing Organization 🗇 (THO - D. Lemmon	10	G	Assign Autometically Retreat Heses	Filter Beltinge
	Decument livinger	Document Name	Type:	Statua	Purchasing Organization	Purchasing Group
	200046577071	Software, Microcomputer (Not Otherwise C		In Process	SCES Purchasing Organization	mild - Acquiation Manager
	200048285871	"cups"		In Process	SCEIS Purchasing Organization	ITIVO - Acquisition Manager
	200040559171	Police Puraul Tite		In Process	SCES Purchasing Organization	mVO - Acquisition Menager

Weight Object Object

- Assign requirements to a different P-Group within an agency.
- Assign requirements to ITMO/MMO.
- Assign requirements to SCEIS Team Members for deletion.

uPerform Information – Redistribute Workload



uPerform Business Process Procedures (BPPs) related to this function are available at http://www.sceis.sc.gov/page.aspx?id=272

SRM SPUR Redistribute Workload

Lesson 2 Summary



You should now be able to:

- Determine if a requirement will need to be redistributed to ITMO/MMO or another buyer.
- Redistribute the requirement to ITMO/MMO or another buyer.



LESSON 3: SOURCING

STATE INFORMATION TECHNOLOGY



5C BUDGET AND CONTROL BOARD

Lesson 3 Learning Objectives



- Output Upon completion of this lesson, you should be able to:
 - Take a requirement from Sourcing and create an RFx.

Carry Out Sourcing



Screenshot from SRM 5.0

S	our	cing								
	W	orklist Find								
	Displa	ay All Categories	*							
	Over	view of Requirements								
		Description	Category	Quantity	<u>Requester</u>	<u>Name of</u> <u>Vendor</u>	Requirement	Contract	Bid Invitation Name	<u>I</u> nvi
		Single Engine Airplane	Airplanes	1 each	Tracy Hill		2000015698/1			
		30 KW Standby Generator 104 Amps	Generators Stationary Type (Not Automotive)	10 each	Tracy Hill		<u>2000015722/1</u>			
		30 KW Standby Generator 125 Amps	Generators Stationary Type (Not Automotive)	10 each	Tracy Hill		<u>2000015726/2</u>			
	Add	to Work Area Refresh								-

Perform Sourcing



SAP			Search:	Q, → Log off
	avorites Perso	nalize View Help	Welcom	ne: MMO Acquisition Manager 17
Home RFx and Auctio	ons Strate	egic Purchasing ZMM Buyer Application Monitor Purchasing Replicate Contracts		[
Overview Reports Service	ce Map			
1	Purchasing	Perform Sourcing - SAP NetWeaver Portal - Windows Internet Explorer	→	Full Screen Options 🔻
Work Overview			Options 🔻	
Purchasing	Active			
Sourcing		Assign Sources of Supply: Step 1 (Select Requisition)		
Invoice Processing		Previous Next Close	2	
	Sour			
 Services 	Ce			
Advanced Search		Select Requisition Assign Sources of Supply (No Items) Review Drafts (No Items)		
Create Documents	RFxs			
Auction	👻 Hic	▼ Search Criteria: Requisitions		
Auction Template		Number of Requisition: Name of Requisition:		
• RFx		Item Description: Product Category:	0	
RFx Template		Product: Supplier:		
Central Functions		Requester: External Requirement:		
Perform Sourcing		Purchasing Organization: Account Assignment Category:		
Pre-select Supplier	Pur	Purchasing Group: Account Assignment Number:		
	1 01	Priority: Intended for Grouping:		
		Delivery Date Range: Include Locked Items:		
		Delivery Date: To:		
		Search		•
				
		Select All Exnand Collanse Hide Subordinate Outlines Reject Items		sites 🔍 100% 🔻 💡

Perform Sourcing – Step 1 Select Requisition



ssign Sources of Supply: Step 1 (Select Requisition) Intrace Med. Select Requestion Assign Sources of Supply: Step 1 (Select Requisition) Select Requestion Assign Sources of Supply: Step 1 (Select Requisition) Select Requestion Assign Sources of Supply: Step 1 (Select Requisition) Summery Sores (No December 1 Select Requestion	Curl Curl
	1.044
Search Crime Regulation Arritor Of Recultaria Set Decorptor: Bett Decorptor: Decorpt Repuetter: Decorpt Repuetter: Purchasting Organization Purchasting Organization<	13
Name of Repustor: Ser Decorptor: Product Category: Product Category: Product Category: Product Category: Product Category: Suggier: Suggier: Suggier: Decompting Organization: Product Category: Suggier: Decompting Organization: Product Category: Decompting Organization: Product Category: Decompting Organization: Product Category: Decompting Organization: Product Category: Decompting Organization: Product Category: Decompting Organization: Product Category: Product Category: Pro	
Sert Decorptor: Product Celegory Image: Stapper matrix Requester Image: Stapper matrix Image: Stapper matrix Image: Stapper matrix Requester Image: Stapper matrix Image: Stapper matrix Image: Stapper matrix Image: Stapper matrix Purchealing Group: Image: Stapper matrix Purchealing Group: Image: Stapper matrix Image: Stapper matr	
Protuct Stappler Stappler Requester 0 SCEES Purcheang Organization Account Assignment Category • Purchasing Organization SSE00001 0 NUO - Acquisition Unlenger Account Assignment Category • Purchasing Organization 0 NUO - Acquisition Unlenger Account Assignment Lamber: • • Purchasing Organization 0 NUO - Acquisition Unlenger Account Assignment Lamber: • • Purchasing Organization • • • • • • • Purchasing Organization • <td></td>	
Pentur Support Requester 0 Second Assignment Category 0 Purchasing Organization SCEBS Purchasing Organization Purchasing Organization Stepsite Theorem Purchasing Organization Tex Purchasing Organization Stepsite Theorem Purchasing Organization Stepsite Theorem Purchasing Organization Account Assignment Humber Descenter Purchasing Organization Stepsite Theorem Organization Stepsite Theorem Organization Purchasing Stepsiconse Stopsite Theorem	
Begueter Begueter <th< td=""><td></td></th<>	
naving Organization 0 5200001 SCEES Purchasing Organization Purchasing Organi	
Burchhaing Group: 0.55000546 MUO - Acquaidant Hanager Account Assignment Humber Importance Printy: • <td></td>	
Printly: Internet of Grauping: Internet of Grauping: Internet of Grauping: Datiwary Date Image: Status of Grauping: Image: Status of Grauping: Image: Status of Grauping: Image: Status of Grauping: Datiwary Date Image: Status of Grauping: Image: Status of Gra	
ektery Dele Ronge	
Delivery Date 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
According Second Column According Second	
Requestion / term humber Description Coogery Party Outenty In Requestion Description Subserv humber Subserv hu	
• 2000000000000000000000000000000000000	et Nurber
• 2000/E1120/: Reference of Envyment Braker Contract: 95014 1 EA AUXIVARE INCLAINE 1001/2016 • 2000/E1120/: B/F for Rool Repar Frypel: 1123 1 EA BROTTE POORE 00202012 • 2000/E144021 Set Standard Stan Familie 17554 1 EA KATHRYIN SAKER 00242012 • 2000/E144021 Seting Cardoox1 57584 1 EA KATHRYIN SAKER 00242012 • 2000/E144021 Seting Course Reper \$7584 1 EA KATHRYIN SAKER 00242012	
• 1000/2000/1 BFF for Posi Repar Project \$1233 1 EA BRUTTE PODRE 06202012 • 2000/454501 Sel Santard Star Famili \$1754 1 EA KATHRY'N SAK2R 00242012 • 2000/454502 Selling Cardoox1 \$7584 1 EA KATHRY'N SAK2R 05242012 • 2000/454502 Selling Cooreo Reper \$7584 1 EA KATHRY'N SAK2R 05242012	
• 2000+554001 Sel Standard Spa Faller \$1754 1 EA KATHRYIN SAKER 00242012 • 2000+554002 Selling Cardooxyi \$7554 1 SA KATHRYIN SAKER 0024/2012 • 2000+554102 Selling Cooreo Paper \$7584 1 SA KATHRYIN SAKER 0024/2012	
• 2000x454302 Selling Carologyd \$7584 I EA KATHRY'N BANDR D52A/2012 • 2000x4544102 Belling Colored Paper \$7584 I EA KATHRY'N BANDR D52A/2012	
20004554222 Being Cooreo Reper \$7584 1 EA KATHRVIN BAKER 08/24/2012	
a Demonstrative Review Unite Dataset United 1 Au Kuthelity's Audit 04042012	
T AND THE PART OF	

- Click blue box to select line item.
- Hold Control key to select multiple line items.
- Click Next to move to Step 2.

Perform Sourcing – Step 2 Assign Sources of Supply



													Ċ¢,
ign Sources of S	unnly: Sten 2) (Assian Sou	irces of a	Supply (1 Items))								
Previous Next 🖌 Sei		(insight set											
19991		1997		1941			1723	1.00					
Select Regulation	Areign Source	es of Supply (1 Ite		eview Drafts (tin Barna'i	C	mary Screen (No Documents)						
- Select Hedrigson	Assign source	rs or suppry (1 ne	(119) N		(ve seria)	Saue	nary poreen (no pocumenta)						
one of the second sector					Denormal Property III	[No.	da an ann an Anna an Anna	Lunce Producer and	[Provide 1	Description in the Property law was			
Beculation / tem Number						Concession of the	Configurable tem Number		and a second	Aneigh to Ky Pertheoing Gri Category Description		Quantity	
		PCC010001100010	Dialchype	sem namper	Contract	No.	Consulation for manual	Description	Valiant	calegory pescheben	- Annual	continuely.	
	6 Decisioner Administra				Pout and	-		DED for David Daviair Deal	4.4	Complication Discoursion Real			
• 2000426905/1					Purchase Order			RFP for Pool Repair Pro	ect	Construction Swimming Pool		1	
					56101230			RFP for Pool Repair Pro	ed	Construction Swimming Pool		1	
					Purchase Order			RFP for Pool Repair Proj	ed	Construction Swimming Pool		,	
					Purchase Order			RFP for Pool Repair Proj	ed	Construction S wimming Pool		,	
					Purchase Order			RFP for Pool Repair Pro	ed	Construction Skimming Pool		1	
					Purchase Order			RFP for Pool Pagair Pro	ed	Construction Skimming Pool		1	
					Purchase Order			RFP for Pool Pagair Pro	ed	Construction Skimming Pool		1	

Weight Will Best Create Draft drop down to select RFx.Weight Will Best Create Draft drop down to select RFx.Weight Will Best Create Draft drop down to select RFx.

Perform Sourcing – Step 3 Review Drafts



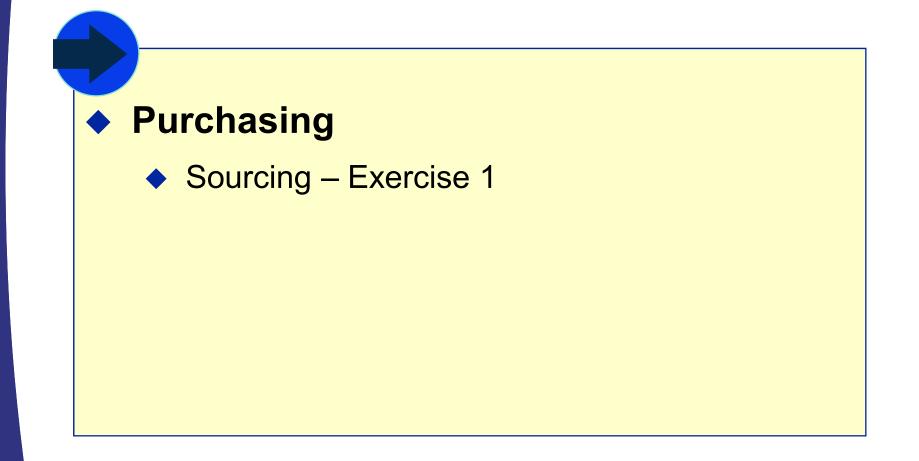
									(Option
sian Sources of Sunnl	y: Step 3 (Review Drafts (1 Items))								
	Il Drafts Close Process Selected Draft									2
Select Requisition	2 Assign Sources of Supply (No Items)	3 Review Drafts (1 Items) Su	mmary Screen (No Do	cuments)	1					
 Created Drafts 										Ē
Change Selected Draft To 🖌 Rer	nove								Se	ettings
Draft Name		Draft Type	Supplier Number			Supplier	Transac	tion Type		
JRSTEVENS 09/05/2013 15:45:5	9	Bid Invitation								•
							ZFPB : F ZIFB : Inv	Best Value Bid ixed Price Bid vitation For Bid		
								eq. for Information lequest for Proposal		L
Details of Selected Drafts .	JRSTEVENS 09/05/2013 15:45:59						ZRQL : F ZRQT : F	RQ - Qualification Request for Quote Small Purchase		s
Remove Expand All Collapse	Configurable Item Number	Description	Category	Quantity	Unit	Info Record	Net Price	Gross Price	Currency	
Requisition / Item Number		RFP for Pool Repair Project	91233	1	EA		1.00	1.00	USD	
		RFP for Pool Repair Project	01200							

We use the drop down to select Transaction Type.

Click Edit Selected Drafts to begin editing solicitation in a new window.

Demonstration and Exercise









- Where You should now be able to:
 - Take a requirement from Sourcing and create an RFx.



LESSON 4: STRATEGIC PURCHASING

STATE INFORMATION TECHNOLOGY



SC BUDGET AND CONTROL BOARD

Lesson 4 Learning Objectives



- Output Upon completion of this lesson, you should be able to:
 - Complete the RFx in Strategic Purchasing.
 - Create a document using Document Builder.
 - Edit a document using MS Word and attach to RFx.
 - Publish RFx and activate the posting date/time via website.
 - Publish an Amendment to an RFx.
 - Send RFx email notification.

Strategic Purchasing



	E.	ā .		D				E	D			
Hane III's and Auctions		ricatalia	Strategic Purchasing Employee	e DeF-Selv	rices ZM	H Buyer Good	da Receipt (HIGC) Application North	r Purchasing Res	picale Contracts			
Overview Reports Service I		anter a De	erview > Strategic Sourceg					0	al Screen Optores *			
Work Derroinw												
Wratege Sourcing	Active Q	lueries										
Contract Management	FVESTORE RANG	DE	ALISOATE Sand (2) Austino	Antennal	(D) Publishe	d (2612) Comple	ted (0) Deleted (0) Release Reject	er# (0)				
Bankenin Farleer			me All (0) Saved (0) Published (0					COLUMN TO A DESCRIPTION OF A DESCRIPTION				
Wearingtood Marine Property of			tes ALREXS.(0) BEP.(0) REQ.(0)	AllAist	ions (0) Eng	tah Auction (0) C	Company Dest Did (0)					
· Services	Docu	ment Outp	pert Last.7.days.(0)									
	RFan A	ai i										
Advanced Search												
Constant Descent of the local division of th	Show Quick Ontena Maintenance Change Query Define New Query Personalize											
Create Documents		1Standard	View - Create REx - C	GOOD IN THE	Second scalar	Palera Creation	Alexandress said houses. third for	Rebert Front	100 NOT 100			
Create Documents * Auction * Auction Template	View.	Standard					Responsing and Assaring Print P					
* Autor	View:	Number	RFx Name	Туре	Status	RFx Category	Purchasing Organization	Submission Deadline	Responses			
 Austine Austine Template MTs 	View Po RFx 540	Number 0005691	RF's Name KM14578 09/25/2013 15 51 10	Type ZFB	Status Saved		Purchasing Organization SCEIS Purchasing Organization					
 Austine Austine Template MTs 	View: 95 RFx 540 540	Number 0905691 0005690	RP's Name KIM14578 09/25/2013 15 51 10 KIM14578 09/25/2013 15 47 42	Type ZFB ZFB	Status Saved Saved	RFx Category	Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization	Submission Deadline	Responses • 0 0			
* Austan * Austan Template	View: % RFx 540/ 540/ 540/	Number 0006691 0006600 0006680	RF x Name KM14578 09/25/2013 15 51 10 KM14578 09/25/2013 15 47 42 Road Spikes	Type 2FB 2FB 2FB	Status Saved Saved Published	RFx Category	Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization	Submission Deadline	Responses • 0			
 Austine Austine Template MTs 	View: 15 RFs 5400 5400 5400 5400	Number 0006401 0006600 0006600 0006600	RFx Name KIM14678 09/25/2013 15 51 10 KIM14678 09/25/2013 15 47 42 Road Spikes Web Site Design Project	Type ZFB ZFB ZFB ZFPB ZFFP	Status Saved Saved Published Published	RFx Category	Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization	Submission Deadline	Responses • 0 0			
 Austine Austine Template MTs 	View: 95 F8Fx 5401 5401 5401 5401	Chumber 0005691 0005690 0005680 0005680 0005682	RF x Name KM14578 09/25/2013 15 51 10 KM14578 09/25/2013 15 47 42 Road Spikes	Type 2FB 2FB 2FB	Status Saved Saved Published	RFx Category	Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization	Submission Deadline 09/26/2013 09/25/2013	Responses • 0 0			
 Austinii Austinii Terreplate MTe 	View: 10 R85x 5400 5400 5400 5400	Number 0005531 0005500 0005500 0005500 0005502 0005502	RFx Name KIM14578 09/25/2013 15 51 10 KIM14578 09/25/2013 15 47 42 Road Spikes Web Site Design Project SHANVEY 09/25/2013 10 33 KIM14578 09/25/2013 10 09	Type ZFB ZFB ZFPB ZFPB ZFP ZFD ZFPD	Status Saved Saved Published Published Saved	RFx Category	Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization	Submission Deadline 09/26/2013 09/25/2013 09/25/2013	Responses • 0 0			
 Austine Austine Template MTs 	View. % RPN 5401 5401 5401 5401 5401 5401	Number 9906593 9906699 9906699 9906699 9906697 9906682 9906682 9906583	RFx Name KIM14578 09/25/2013 15 51 10 KIM14578 09/25/2013 15 47 42 Road Spikes Web Site Design Project SHANVEY 09/25/2013 10 33	Type 2FB 2FB 2FB 2FB 2FB	Status Saved Saved Published Published Saved Published	RFx Category	Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization	Submission Deadline 09/26/2013 09/25/2013	Responses • 0 0			
 Auction Auction Template IITs 	View: % R8% 5401 5402 5402 5402 5402 5402 5402	Number 0006031 0006000 0006000 0006002 0006602 0006602 0006602 0006603	RFx Name KIM14578 09/25/2013 15 51 10 KIM14578 09/25/2013 15 47 42 Road Spikes Web Site Design Project SHANVEY 00/25/2013 10 09 Fixed Price Bid Test 1 IT04A CHEC	Type 2FB 2FB 2FB 2FFB 2FFB 2FFB 2FPB	Status Saved Saved Published Published Published Published	RFx Category	Purchasing Organization SCEIS Purchasing Organization	Submission Deadline 09/26/2013 09/25/2013 09/25/2013 09/25/2013	Responses • 0 0			
 Auction Auction Template IITs 	View: 10 R85x 5400 5400 5400 5400 5400 5400 5400 5400	Number 9906593 9906699 9906699 9906699 9906697 9906682 9906682 9906583	RFx Name KIM14578 09/25/2013 15 51 10 KIM14578 09/25/2013 15 47 42 Road Spikes Web Site Design Project SHANVEY 00/25/2013 10 09 Flored Price Bid Test 1	Type 2F8 2F8 2F8 2F8 2F8 2F8 2F8	Status Saved Saved Published Published Published Published	RFx Category	Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization	Submission Deadline 09/26/2013 09/25/2013 09/25/2013 09/25/2013 09/15/2013	Responses • 0 0			

RFx documents can be found under Strategic Purchasing – Strategic Sourcing.

Process Bid Invitation – SRM 5.0



Cha	nge Invitation For Bid	
Reco	ords Management Start Document Buil	der Publish Hold Check Refresh Delete Download Upload Output Preview Back to
Na	TRNSRM31001 12/29/2009 11:36	:09 Number 5400001301
•	Header Data Item Data	
[Basic Data <u>Partner</u> <u>Bidder/Bids</u> <u>Doc</u>	cuments Attributes Weighting Additional Currencies Approval Preview Status Status Versions
	Transaction Type	ZIFB Invitation For Bid
	Product Category	▼
	Type of Publication	Public Bid Invitation
	Responsible Purchasing Organization	SCEIS Purchasing Organization 💌
	Responsible Purchasing Group	740 - DNR
	Company Code	State of South Carolina
	Start Date	00:00:00
	End Date *	05/03/2010
	Opening Date	05/03/2010

Edit RFx – SRM 7.2



dit RFx: 540000.			1000		
Read Only Other P	ublen Seve Check Export Print P	every Delete Import Aelaled	LINE		
Number 5400005895 Number of Bidder	Smart Number JRSTEVENS 05/05/2 8 0 Number of Items 1 Ve		For Bitt Status Saved Cre Type Active Version External V	ated On: 05/05/2013 15 48:32 Creat rision flumiber	ed By 10r. John R Stevens. Time Zone EST
RFX Information	Ecitors term Notes and	Attactments Trieghts and So	area Approval Tracking		
RFx Parameters Out	stors listes ant Attachments				
Kane Type Product Calegory: Reason Cobe Organization Purchasing Organization	IRSTEVENS DHOSED13 15 45 Shart Tumber a Externa IRSTEVENS DB05/2013 15 45 55 Invitation For Sta SEES Purchasing Organization UNIO - Acquisiton Manager DD:00:00 DD:00		ameters Currency: Target Value: Detailed Price Information Police-On Document Bidder Can Change RFx Responses lot RFx Responses for Each Constany Display Weighting to Bodens: Award/Contract SCBD Category: * Its Award: *	1.00 USD Simple Price •] Contract •]	•
Vald From / To Award Pooting Date * * Partners and Delivery / Detail Act a Fancian * Requester • Geode Recovert	rformøforn Ef.litel Get Giver	Tuestor 24202 24202	Xette BROTTE POORE BROTTE POORE		Piters Sel Piters Number
· Shp-To Attirest	i)	34	SCRIE Rout		864-391-0415
		44	ACAMON COMMON		Contract Contract of

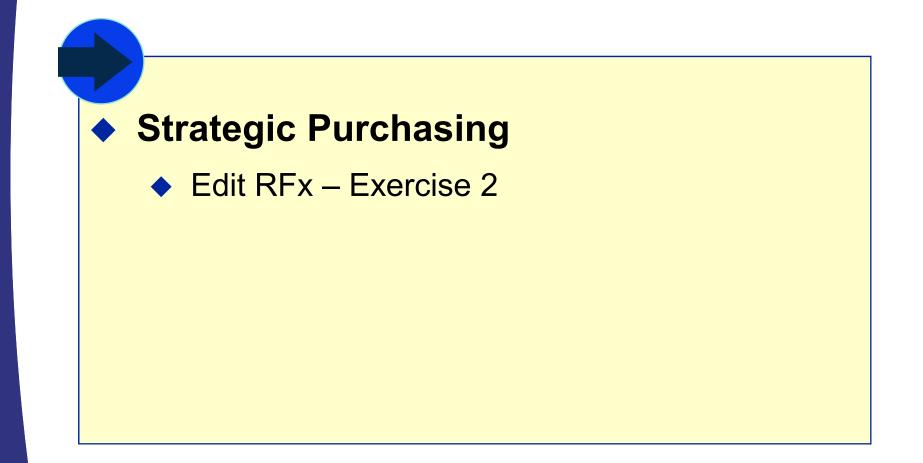
Edit RFx – Helpful Hints



- Submission Deadline and Opening Date should be the same in order to seal bids from the vendor.
- On not enter a Product Category on the RFx Information Screen. The Product Category must be entered on the line item.
- A bidder is required in order to publish a solicitation. Use SCEIS Bidder if a vendor is not known.
- If creating an RFx without a shopping cart, you must enter the Location on the RFX Information Tab prior to publishing.







Document Builder



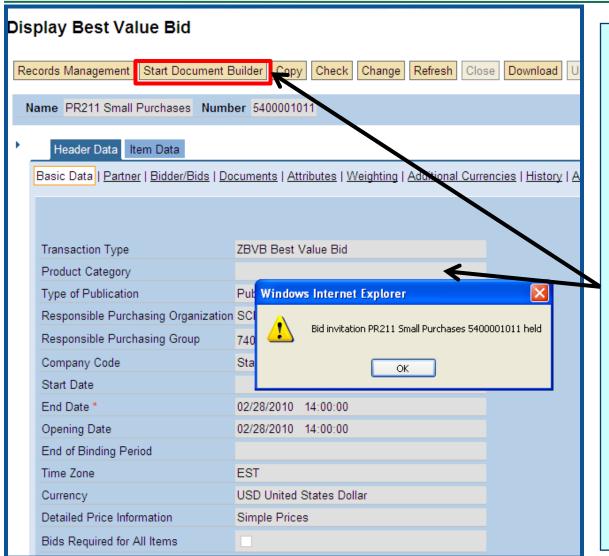
- Oc Builder is a Compendium-based tool to help build solicitation and award documents.
- Oc Builder asks a series of questions to determine the clauses included in the document.
- Oc Builder contains most up-to-date clauses.
- Some changes in SRM may update Document Builder, but only before the document is released.
- Changes in Document Builder do not update SRM.
- Ocument Builder does not store or maintain data.

Document Builder Functionality cont. SCEIS

- Updates or edits cannot be made in Document Builder once the document has been released.
- Additional text specific to the solicitation (ex. Scope of Work) is added to the document using MS Word outside of SCEIS.
- There is currently not a dialog for small purchases terms and conditions.

SRM 5.0





Click the OK button in the Windows Internet Explorer box. You will notice that the Start Document Builder button is now enabled. Click on the Start Document Builder to begin the process.

Note: Document Builder opens up in a new browser window.

SRM 7.2



	→ 🗄
Image: Sease Cease Cease Cease Convent to Audom I Excont Prote Prevent Retails Links a Image: Vou are not allowed to enter a tax jurisdiction code for country US Deciment Budger Image: Vou are not allowed to enter a tax jurisdiction code for country US Create Biscont Image: Vou are not allowed to enter a tax jurisdiction code for country US Create Biscont Image: Vou are not allowed to enter a tax jurisdiction code for country US Create Biscont Image: Vou are not allowed to enter a tax jurisdiction code for country US Created Biscont Image: Vou are not allowed to enter a tax jurisdiction code for country US Created Control Control (Vounant) Image: Second Status Binger For Biscont Created Con GloG/2013 15.45.05 Created By Mr. John R Status To Time Zonet Minumber of Bidders 1 Reumber Second Status Version Rumber Version Rumber External Version Rumber Minumber of Bidders 1 Rumber of Nones and Altamments Version Rumber Created Con GloG/2013 15.45.05 Created By Mr. John R Status To Time Zone Minumber of Bidders 1 Rumber of Nones and Altamments Version Rumber Currency: USD Curency: USD Currency: USD <th>Course</th>	Course
Sugare not allowed to enter a tax jurisdiction code for bountry US Sugare Tevaluation O'You are not allowed to enter a tax jurisdiction code for country US Document Builder O'You are not allowed to enter a tax jurisdiction code for country US Document Builder O'You are not allowed to enter a tax jurisdiction code for country US Document Builder O'You are not allowed to enter a tax jurisdiction code for country US Document Builder O'Re Recycled Cantobard 5400000000 savel Sinant Bumber of Exciption Cantobards Type invitation Far Bit Status Baved Created On: 060050013 15:40.05 Created By 101 Juin R Bitmens Time Zone Number of Bidders Invinder of Rems 1 Version Bumber Version Type Active Version External Version Bumber Time Zone Number of Bidders Invinder of Bidders Number of Rems 1 Version Bumber Version Far Bid Time Zone Notes and Alterments Version Bumber Version Type Active Version Currency: USC 0.81 USB Created By 101 Juin R Bitwents Time Zone Name Bidder Cantobard Fore Version Currency: USC 0.81 USB 0.81 USB Created By 102 Juin R Bitwents Time Zone Name Bidder Cantobard Currency: USC 0.81 USB	
Line Vou are not ablived to enter a tax jurisdiction code for country US RPx Recycled Cardboard 5400000000 eaved Number 5800000000 eaved Number of Bidders 1 Rumber Recycled Cardboard: Type mutation Por Bid Status Saved Created On 05005/2013 15:48:05. Created By Hr. John R Dievens. Time Zone RFx Information Bidders 1 Rumber of Bidders 1 Rumber of Items 1 Version Rumber Version Type Active Version Tracking Inter Antioner Information Bidders 1 Recycled Cardboard Inter Antioner Information Bidders 1 Recycled Cardboard Inter Antioner Information Bidders 1 Recycled Cardboard Version Type Active Version Tracking Inter Antioner Information Bidders 1 Recycled Cardboard Inter Antioner Information Bidders 1 Inter External Version Rumber Version Recycled Cardboard Inter Antioner Information Bidders 1 Recycled Cardboard Inter Antioner Information Bidders 1 Recycled Cardboard Inter Antioner Information Bidders 1 Recycled Cardboard Inter Antioner Information Bider Bider Cardboard Inter Antioner Information Bider Cardboard Inter Antioner Information Bider Bider Cardboard Inter Antioner Information Bider Cardboard Inter Antioner Information Bider Cardboard Inter Antioner Information Bider Cardboard Inter Antioner Information Inter Antioner Information Inter Antioner Information Inter Antioner Information	
B** Recycled Cardboard 540005000 savel Number 150005000 Instatut Number of Recycled Cardboard Type motatum For Bid Status Saved Carebia On 060502013 15.48 05 Created thy Hr. John R Stevens Time Zone Number of Bidders 1 Number of Recycled Cardboard Version Rumber Version Type Adve Version External Version Number Created On 060502013 15.48 05 Created thy Hr. John R Stevens Time Zone NEX.Information Bidgers terms Name and Attacments Version Stores Approval Tracking NEX.Information Bidgers Terms Name and Attacments Version Rumber Approval Tracking New Recycled Cardboard Event Parameters Currency: USD Version Version Rumber Version Rumber Small Number is Evental Event Parameters Currency: USD Version Currency: USD Version Name: Recycles Cardboard Datated Price Intimater Event Parameters Event P	
Number 16200000000 Insert Number of Network 1 Type Provide Provide Status Saved Created On 06/05/0013 15:48.05 Created By Hr. John R Stevens Time Zone NEX.Information Boleve terms Name and Attacments Version Type Adve Version Tracking NEX.Information Boleve terms Name and Attacments Version Type Adve Version Tracking NEX.Information Boleve terms Name and Attacments Version Stores Approval Tracking NEX.Information Boleve terms Name and Attacments Version Stores Approval Tracking Next terms Second Stores Approval Tracking Currency: USD Version Name Recycles Cariboard Detailed Price 0.001 Version Detailed Price 0.001 Version Name Recycles Cariboard Detailed Price Detailed Price 0.001 Version 0.001 Version 0.001 Version Type Instation Fir Bit Second Rev Responses for Each Comany Detailed Price 0.001 Version 0.001 Version Name Recycles Cariboard Detailed Price Rev Responses for Each Comany 0.0001 Version 0.0001 Version </td <td></td>	
Number of Bidders Number of Bidders Number of Bidders Version Rumber Version Type Active Version External Version Rumber RFX Information Bidders tems Notes and Attacmments Version Soores Approval Tracking NFx Parameters Oversion Notes and Attacmments Version Soores Approval Tracking NFx Parameters Oversion Notes and Attacmments Event Parameters Currency: USD Smert Number Recyclest Cariboans Event Parameters Currency: USD Oversion Name Recyclest Cariboans Currency: USD Oversion Oversion Name Recyclest Cariboans Currency: USD Oversion Oversion Name Recyclest Cariboans Detailed Price Internation Bidler Ceri Charge RFx Responses Oversion Oversion Type Instature Fir Bid Product Category: Bidler Ceri Charge RFx Responses Version Corgany Oversion Reasen Coor: Detailed Price RFx Responses for Each Corgany Detailed Price RFx Responses Version <td></td>	
Image: Number is External Target Value 0.61 USD Name Recycline: Caroboard Detailed Price Information Birote Price Type Imutation For Bio Polow-On Document Contract Product Category: Birdser Can Change RPX Responses V Reason Code: Allow Multiple RPX Responses for Each Corgany Dealey Weighting to Biolers	
Name Recycline: Caritboard Detailed Price Bitter Price Type: Invitation For Bid Follow-On Document. Contract Product Category: Bittler Can Change RFx Responses V Readon Code: Allow Multiple RFx Responses for Each Contrany. Dealer Sole: Dealer Weighting to Bittlers.	
Product Category: Bittler Can Change Rfx Responses (2) Reason Code: Display Weighting to Bistlers: D	
Reason Code:	
Research Code: Depley Weighting to Braters:	
Purchasing Organization: SCEIS Purchasing Organization Scenario Award/Contract	
Purchasing Group: MMO - Acquirefun Manager Scool Category * Supplies	
Dates No Award Proc	
Submasion Dealthre * 05/12/2013 14:00:00	

- We use the Related Links drop-down to select Document Builder.
- Ocument Builder opens in a new browser window.

Doc Builder 5.0 - Dialog



ze Z Edit Copy Release Cancel Refresh Logoff		
leader Data Dialog Document Summary Preview Attachments		
roups	Source Selection	
revious Next Finish with defaults	What is your Document Selection?	i
locument Data Groups 🙌	IFB (Competitive Sealed Bidding)	
X DOC_ROOT	ORFP (Competitive Sealed Proposal) Refresh if selected	
• 🗙 Source Selection	BVB (Competitive Best Value Bidding) Refresh if selected SER (Competitive Fixed Price Bidding)	
 X Office Conducting Procurement 	 FPB (Competitive Fixed Price Bidding) RAUC (Reverse Auction/Competitive On-line Bidding) 	
• 🗙 Acquisition type		
• 🗶 What do you reasonably anticipate will be the maximum dollar value of a purchase order?		
• 🗙 Duration of Contract		
 X Indefinite quantity of supplies or indefinite delivery of services 		
• 🗙 Number of Using Agencies		
 X Services performed on State property 		
• 🗙 How will award be made?		
• 🗙 On-line Procurement	k	
 X Blank Parts of the Uniform Solicitation Format 	, i i i i i i i i i i i i i i i i i i i	
• 💥 Attachments		
• 💥 Pre-Bid/Proposal Conference		
• 🗶 On-Site Visit		
* 🗶 Descriptive Literature		
• 🗶 Are Samples Necessary		
 X Standard Equipment Agreement 		
• 💥 Printing Services		
• 🗶 Web/Internet Services		
 X Assorted additional performance requirements and obligations. 		
* 🗙 Contractor Responsibility - Mandatory Minimum Qualifications		
• 🗙 Use of State owned property		
• 🗙 Price Adjustment		
X Document Variables		

Doc Builder 7.2 - Dialog



t al dalog data has been accepted		
cument Builder		
VI Day Save Several liker formation Remove Cancel Refresh Lug Off reader Data Dialog Document Summary Preview Attachments		
Groups	Source Selection	
Previus Next Friell with Defaulte	What is your Document Selection?	
	(*) FB (Competitive Sealed Rotagosa): Refresh if selected (*) FV9 (Competitive Best Value Bioding): Refresh if selected (*) FV9 (Competitive Powel Proce Bioding) (*) RAUC (Reverse Auction/Competitive On-line Bioding)	

Document Summary



Header Data Disco Ducume	nt Summary	Re	www	menta								_
Document Summary												
Bocument Sections	Element Su	minary										
· Sectors	Vew: [3ta	ndars Ve	et T EAD	Ita Delle	Red Trate	te bit hale	U Deiste	Utilies a				
 Fage 1 Fage 2 	Pestor	Sector	Denent	Effective Date	Version	Regulation Sel	Property	Description.	Estable	Inclusion	Filler Status	Į,
Table of Contents	1	D-A	BC_01_000_1	11/18/2008		CONFENDIN	FullText.					Г
- SCOPE OF SOLICITATION	2	5-8	sacholu_be	06/12/2017		CONFENDIN	189					t
. INSTRUCTIONS TO OFFERDRE - A.	3	0-8	86_81_018_1	07/01/2007		CONPENDIUM	FullText					Г
- NETRUCTIONE TO OFFERORS - B.	4	TOC	700	10/26/2017		COMPENDIN	Pul Text		1			T
· SCOPE OF WORK/SPECIFICATIONS	E	1	BECTION_I	06/11/2007		CONFENDIN	Full Text					Г
- INFORMATION FOR OFFERIORS TO SU		8.4	SECTION_SA	08/12/2007		COMPENDIN	Full Text					T
- QUALIFICATIONS	7	8-8	SC_02_24003_1	01/01/2006		CONFERENCIA	Full Text	DEFINITIONS (JAN 2006)				Ε
- AWARD CRITERIA	- E	6.4	SC_02_24005_1	01/01/2004		COUPE-DUII	FullText	AMENDMENTS TO SOLICITATION (JAN 2004)				Γ
 TERMS AND CONDITIONS - A, GENE 		24	5C_82_2A010_1	01/01/2004		COMPENDIN	Put Text	AWARD NOTFICATION (NOV 2007)				
TERMS AND CONDITIONS - 8. SPEC BODNIC SCHEDULE/RRICE BUSINES	10	5.4	BC_82_24015_1	01/01/2004		CONPENDION	PullText	BIDPROPOSAL AS OFFER TO CONTRACT (JAN 2014)				

On the Document Summary tab you can compare your questions/answers to the related Compendium sections. You can also review the clause that will be inserted into your document. This screen is used to insert additional clauses as well as reviewing clauses added by the dialog.

Release

umont Buildor	SAD NotWeaver	Portal - Windows	Internet Eve	larar
ument Duituer -	SAP Netweaver	Purtat - Winduws	ппетпет скр	uorer

Document Data User Workspace		
Document Builder		
Edit Copy Save Save as User Template Release Cancel Refresh Log Off		
Header Data Dialog Document Summary Preview Attachments		
Reader Data Dialog Document Summary Preview Attachments		
Groups	Source Selection	
Previous Next Finish with Defaults		
	What is your Document Selection?	i
Document Data Groups	IFB (Competitive Sealed Bidding) RFP (Competitive Sealed Proposal) Refresh if selected	
 V Document Data 		
Source Selection	O BVB (Competitive Best Value Bidding) Refresh if selected	
 Office Conducting Procurement 	FPB (Competitive Fixed Price Bidding) DAUC (Pausara Austing (Competitive Competition)	
 Acquisition type 	RAUC (Reverse Auction/Competitive On-line Bidding)	
What do you reasonably anticipate will be the maximum dollar value of a purchase order?		
 V Duration of Contract 		
 Indefinite quantity of supplies or indefinite delivery of services 		
 Vumber of Using Agencies 		
 Services performed on State property 		
 Image: Weight of the second sec		
 V How will award be made? 		
 V On-line Procurement 		
 Search Blank Parts of the Uniform Solicitation Format 		
 Attachments 		
 Pre-Bid/Proposal Conference 		



After you have reviewed your document and you feel that it is complete, click on the Release button.

After you have released the document, the Logoff button will be enabled.

Publishing your Solicitation



- Save the MS Word version of the Terms & Conditions to your desktop/network drive.
- Make edits in MS Word to the document to add Scope of Work, Mandatory Minimums, additional clauses, etc.
- Reattach the final version of the written solicitation to the Notes and Attachments tab.
- Our Construction of the second sec
- Clicking the Publish button sends the solicitation to the Procurement Information Center, SCBO, and notifications to vendors with matching commodity codes.

Document Finishing



2	RFx - SAP NetWeave	er Portal - Mozilla Firefox		10.4
				lf t
	Display RFx :			Or
	🖉 Edit 🚱 [Close Copy Check Close Rfx Responses and Awards C	create Follow-on RFx Convert to Auction Export Print Preview	
	RFx Number 5400 Time Zone			ch
	RFX Informat		Weights and Scores Approval Tracking	do
	▼ Notes			ma
	Add / Clear			
	Assigned To	Category	Text Preview	an
	Item01"MOT	Tendering text	LAW ENFORCEMENT MOTORCYCLE CRUISER (HARLEY DAVIDSON F	
	Item02"MOT	Tendering text	LAW ENFORCEMENT MOTORCYCLE TOURING(BMW R1200RTP, HON	on
	Item03"SED	Tendering text	SEDAN, POLICE, FULL SIZE, ALL WHEEL DRIVE, PURSUIT PACKA	
	Item04"TRU	Tendering text	TRUCK, POLICE, 4x2 UTILITY (SUV), INTERMEDIATE, 4-DOOR,	

If the Visible Internally Only checkbox is checked, then the document will not be made public. It will be an internal document only.

-	 Attachments 												
	Add Attachment Edit Description Versioning - Delete Create Qualification Profile Fitter Settings												
	Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Туре	Size (KB)	Changed by	Changed on	
	Document Header	Legal Document	Word Document	Word Document.WORD	2		✓		doc	268	PIAPPLUSER	08/21/2013	
	Document Header	Legal Document	PDF Document	PDF Document.PDF	2		✓		pdf	134	PIAPPLUSER	08/21/2013	
	Document Header	Legal Document	Responses Report	Responses Report.html	2		✓		htm	38	PIAPPLUSER	08/21/2013	
	Document Header	Standard Attachment	Vehicle Questionnaire	QUESTIONNAIRE-VEHICLE 2013.doc	1				doc	68	STA61092	08/23/2013	
	Document Header	Standard Attachment	IFB 5400006536	Law Enforcement 6536.docx	1				docx	182	STA61092	08/28/2013	-

If you click on the hyperlink located under the Description column, you can review the actual document.

Demonstration and Exercise



Related Links – Document Builder Use Doc Builder to build a Solicitation Document and Publish an RFx – Exercise 3.

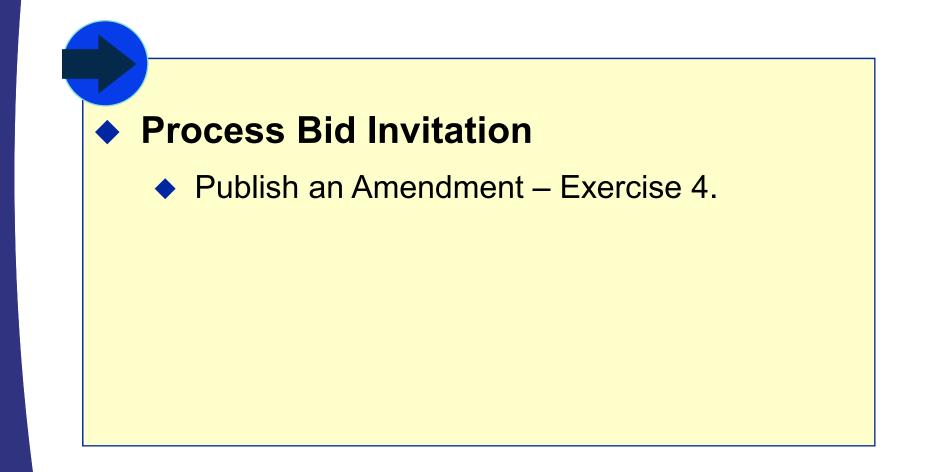
Solicitation Amendments



- Amendments will be completed as a MS Word Document and attached to the RFx.
- If an amendment modifies the bid schedule, make sure to make the same changes on the Item Data tab of the RFx.
- If an amendment changes the End Date, make sure to change the End Date & Opening Date on the Header Data tab of the RFx.
- Once the amendment is added and the changes made, click the publish button.

Demonstration and Exercise





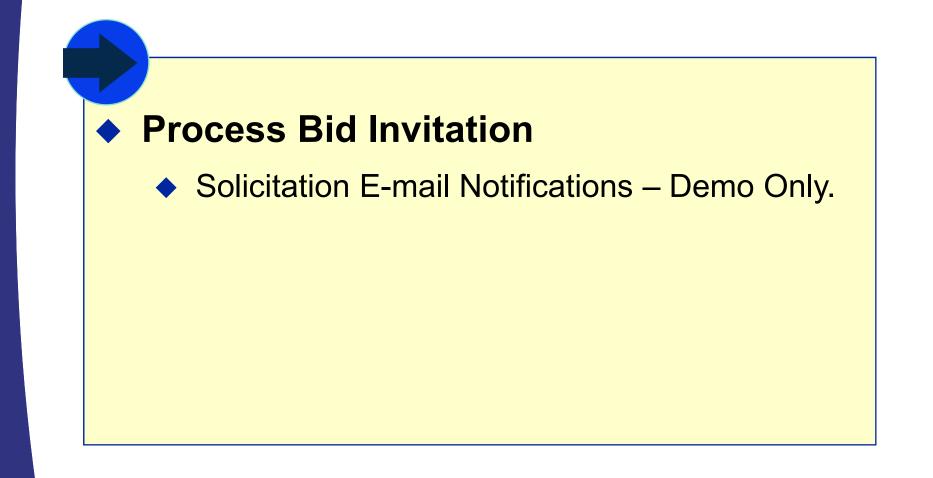
Solicitation E-mail Notifications



- Solicitation notifications are sent via e-mail only when the solicitation is initially published.
 E-mail notifications are not sent when publishing amendments.
- Content of the service of the ser
- Weight Construction of the second additional with the second additional of the second addition of the second ad

Demonstration and Exercise





Lesson 4 Summary



You should now be able to:

- Complete the RFx in Strategic Purchasing.
- Create a document using Document Builder.
- Edit a document using MS Word and attach to RFx.
- Publish RFx and activate the posting date/time via website.
- Publish an Amendment to an RFx.
- Send RFx email notification.



LESSON 5: CREATE SURROGATE BIDS

STATE INFORMATION TECHNOLOGY



SC BUDGET AND CONTROL BOARD

Lesson 5 Learning Objectives



- Output Upon completion of this lesson, you should be able to:
 - Describe how vendors respond to RFxs.
 - Create a surrogate bid.

Create Surrogate Bids



What is a Surrogate Bid?

- Surrogate bid process is used when an agency accepts paper bids from a vendor. Because paper bids have to be entered into SRM, the buyer is responsible for entering the bids.
- The screens a buyer sees when entering a surrogate bid are the same screens a vendor sees when bidding on-line.

Extending the Submission Deadline S



)isplay RFx :									
Lan Case	Copy Check	Close Rfx Re	sponses and Awards	Create Follow-on Rf	x Convert to Auc	ction Expert	Print Preview Qu	estions and Ana	wers (0) Related Links
RFx Number 540000537 Number of Supple		Number Interprete mber of Items 3		Type Fixed Price Bid ber 4 Version 1	Status Pub Type Active Versi		reated On 07/22/20 nal Version Numbe	Contraction of the second s	Created By Ms. There
RFX Information	Bidders	terra Note	and Attachmenta	Weights and Scores	Approval	Tracking			
RFs Parameters Que	nstens Note	s and Attactments	Table Extension		2 2				
Identification					Event Parame	eters			
Smart Humber:	interpreters se	rvices TTC			9150000.009	103082	Currency.	USD	
	Smart Numb	er is External					Target Value	0	0.00 USD
Rf'x Name:	interpreters se	rvices TTC				Deta	led Price Information	Simple Price	
RFx Type	Fixed Price Bid						fellow-On Document	Contraction of the second	1000
Product Category:	96117	krite	rpreter Services Hear	ing impaired			oge RFx Responses	100	
Reason Code					Allow Hulliple I		a for Each Company: Weighting to Biddens	1000	
Organization									
urchasing Organization.	SCEIS Purchas	sing Organization			Scenario Awa	ard/Contract			
Purchaeing Group	MHO - T. Watts	50)					SCBO Category	Rendres	
Dates							No Award.	Article Provide Provid	
Start Date:		00:00:00						110 A	
Submission Deadline: *	09/03/2013	11.10:00							
Opening Date:	08/03/2013	11:10:00							
End of Binding Period	Ľ	3							
Valid From / To:	11/01/2013	- 10/31/2018							
Award Posting Date: *	09/17/2013								
· Partners and Delivery	Information								
Dutats Add - Sens	tellul Cul	Clear							
Function			Number.			Name			

 Prior to entering Surrogate Bids, the Submission
 Deadline of the solicitation must
 be extended.

Click the Edit
 button, change
 the Submission
 Deadline, and
 remove the
 Opening Date.

Publish the RFx



Edit RFx :		
Close Publish Save	Check Export Print Preview Import Related Links	
RFx Number 540000637 Number of Suppli	· · · · · · · · · · · · · · · · · · ·	St e C
RFX Information	Bidders Items Notes and Attachments Weights and Scores	A
RFx Parameters Que	estions Notes and Attachments Table Extension	
Identification		E١
Smart Number:		
	Smart Number is External	
	New Serial Part for Smart Number	
RFx Name:		
	Fixed Price Bid	А
Product Category:		
Reason Code:		
Organization		s
Purchasing Organization:	SCEIS Purchasing Organization	
Purchasing Group:	MMO - T. Watts	
Dates		
Start Date:	(00:00:00)	
Submission Deadline: *	09/16/2013 🗊 16:00:00	
Opening Date:		
End of Binding Period:		
Valid From / To:	11/01/2013 😨 - 10/31/2018 😨	
Award Posting Date: *	09/17/2013 🔄	

- Extend the Submission
 Deadline just long enough to enter the Surrogate
 Bids.
- Add tendering text indicating that the RFx is opened for administrative purposes only
- You must click the Publish button after changing the dates.

Responses and Awards



Active Queries													
RFxs All (962) Saved (79) Awaiting Approval (0) Published (0) Completed (0) Deleted (0) Release Rejected (0)													
	Auctions All (0) Saved (0) Published (0) Active (0) Paused (0) Ended (0) Completed (0)												
Sourcing Templates All RFxs (0) RFP (0) RFQ (0) All Auctions (0) English Auction (0) Company Best Bid (0)													
Document Output Last 7 days (0)													
RFxs - All													
S	Show Quick Criteri	a Maintenance											
View: [Standard View] 💌 Create RFx 🖌 Copy Display Edit Delete Publish Responses and Awards Print Preview Refresh Export 🖌 🍞 🖉													
Ċ	RFx Number	RFx Name	Туре	Status	RFx Category	Purchasing Organization	Submission Deadline	Responses					
נ	RFx Number 5400006494	RFx Name TERM CONTRACT FOR PICK-UP TRUCKS	Type ZIFB	Status Deleted	RFx Category	Purchasing Organization SCEIS Purchasing Organization	Submission Deadline	Responses 0					
]					RFx Category		Submission Deadline						
]	<u>5400006494</u>	TERM CONTRACT FOR PICK-UP TRUCKS	ZIFB	Deleted	RFx Category 07210		Submission Deadline	0					
	<u>5400006494</u> <u>5400006478</u>	TERM CONTRACT FOR PICK-UP TRUCKS CAT07065 08/13/2013 14:05:21	ZIFB	Deleted Deleted		SCEIS Purchasing Organization		0					
	5400006494 5400006478 5400006444	TERM CONTRACT FOR PICK-UP TRUCKS CAT07065 08/13/2013 14:05:21 Vehicles - Cab and Chassis - Statewide	ZIFB ZIFB ZIFB	Deleted Deleted Published	07210	SCEIS Purchasing Organization	10/01/2013	0					
	<u>5400006494</u> <u>5400006478</u> <u>5400006444</u> <u>5400006425</u>	TERM CONTRACT FOR PICK-UP TRUCKS CAT07065 08/13/2013 14:05:21 Vehicles - Cab and Chassis - Statewide OEM Gray Cast Iron Brake Drums	ZIFB ZIFB ZIFB ZIFB	Deleted Deleted Published Saved	07210 07543	SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization	10/01/2013 10/02/2013	0					
	5400006494 5400006478 5400006444 5400006425 5400006409	TERM CONTRACT FOR PICK-UP TRUCKS CAT07065 08/13/2013 14:05:21 Vehicles - Cab and Chassis - Statewide OEM Gray Cast Iron Brake Drums PROJECT DIRECTOR FOR CREATE	ZIFB ZIFB ZIFB ZIFB ZIFB ZRFP	Deleted Deleted Published Saved Saved	07210 07543 95877	SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization	10/01/2013 10/02/2013 08/05/2013	0					
	5400006494 5400006478 5400006444 5400006425 5400006409 5400006407	TERM CONTRACT FOR PICK-UP TRUCKS CAT07065 08/13/2013 14:05:21 Vehicles - Cab and Chassis - Statewide OEM Gray Cast Iron Brake Drums PROJECT DIRECTOR FOR CREATE Vehicles - Cab and Chassis - Statewide	ZIFB ZIFB ZIFB ZIFB ZRFP ZIFB	Deleted Deleted Published Saved Saved Deleted	07210 07543 95877 07210	SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization	10/01/2013 10/02/2013 08/05/2013 10/01/2013	0 0 0 0 0					
	5400006494 5400006478 5400006444 5400006425 5400006409 5400006407 5400006388	TERM CONTRACT FOR PICK-UP TRUCKS CAT07065 08/13/2013 14:05:21 Vehicles - Cab and Chassis - Statewide OEM Gray Cast Iron Brake Drums PROJECT DIRECTOR FOR CREATE Vehicles - Cab and Chassis - Statewide OEM Gray Cast Iron Brake Drum	ZIFB ZIFB ZIFB ZIFB ZIFB ZIFB ZIFB	Deleted Deleted Published Saved Saved Deleted Deleted	07210 07543 95877 07210	SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization SCEIS Purchasing Organization	10/01/2013 10/02/2013 08/05/2013 10/01/2013 09/10/2013	0 0 0 0 0 0					

Select the RFx to enter the bid.

Click Responses and Awards.

Response Activity



Responses and Awards												
Print Preview 🚱 Close Create Follow-on RFx Export Questions and Answers (0) Synopsis												
Remaining Time 0 Days 00:12:53 Smart Number Interpreters services TTC Type Fixed Price Bid Status Published Number of Suppliers 1												
Response Activity Re	sponse Comparison Su	rrogate Bidding										
Details Response On Behalf A	Return Response Contract Ma	ass Update										
Response Number Response Status Company Name Bidder Name Intent Response Version												
	SCEIS BIDDER											

If the vendor does not appear in the Response Activity Tab, use the Surrogate Bidding tab to add the vendor.

Surrogate Bidding



nt Preview 🔯 Clo	se Export Questions and An	iswers (0) Synopsis			
maining Time 0 Days 00:08	:57 Smart Number Interp	reters se	rvices TTC Type	Fixed Price Bid	Status Po	ublished Number of Su
Response Activity	Response Comparison		urrogate Bidding			
Neaponae Activity	Response companson		arrogate blading			
View By: Bidders Inclu	iding Contact Persons 🔹 👻)				
Search by Contact Pe	rsons					
Business Partner Organi	zation:		C	ountry:		
Company Na		=	Company N			=
	E-Mail:	_	Minority S	Status:		
1	DUNS:		Women O	wned:		
Postal	Code:			City:		
Maximum Number o	of Hits:	500	Surroga	te Bid:		Search
Bidders						
Register						
Organization Name	Business Partner Organization	DUNS	Business Partner ID	Last Name	First Name	
RGB TERPWORKS	700000458		2756	BURGESS MACK	ROBIN	
RGB SPECTRUM	7000099224		9455	DELAERE	ТІМ	
RGB SYSTEMS INC	7000099552					
RGB SPECTRUM	7000133077					
RGB GROUP INC	7000195149		39066	ESPERT	SHIRLEY	

- Weight Use the fields to search for the vendor.
- Select the vendor.
- Click Register.

Vendor Contact Information



- Wendors <u>must</u> have a contact person to enter surrogate bids.
- Vendors who have gone through the SCEIS registration process <u>after</u> November 2007 will have a contact person.
- Vendors who were registered <u>prior</u> to 2007 and were transferred from the Comptroller General's or MMO's legacy vendor file will NOT have a contact person.
- If the vendor has a vendor number but does not have a contact person, the vendor will need to complete the new vendor registration process at <u>www.procurement.sc.gov</u>. The vendor should reference their current vendor number in Step 9 of the process in the Message to Administrator section.

Response on Behalf



MPreven	Create Follow-on RFs Export	Gueslions and Answers (0)	Synepein.				8
maining Time 0 Days 00 04:51	Smart Number Interpreter	a services TTC Type Fire	nd Price Bid Statum	Ubiened	Number of Suppliers 2	RFx Number 34000	6278
Response Activity	Response Comparison	Surrosale Bolding					
Response Activity	Response Comparison	Surrogale Bidding		_			
	Response Companies						Expand Nowe
			Didder Name	adent	Response Version	Last Changed	Expand Nave Response on Scholf
Contails Hengerman Contient	alf - Refure Response Care	red Mana Upthere	Older Name	biterif.	Response Version	Last Charged	

Return to the Response Activity Screen and Click Expand Rows.

reven.		Alse (C	Seate Follow-on RFs Exp	Questions and Answer	a(0) Synopea				
nierg Tierre	I Days 00	14.51	Smart Number Interpr	ellara services TTC Typ	e Fixed Price Bit Status Public	of Barri	ber of Suppliers 2	RFs Number 1400001378	
Respo	mae Activ	4	Response Comparison	Surrogala Bidding					
			Response Comparison						Colapse Rev
Releta	Response				Bidder Tarre	biard	Response Version	Last Diarged	Cutages Nov
Resp	Response Create Drucey		(a) Anter Angenes I (Contract Massa Diprimite	Bidder Tame	bilant Q	Response Verson	Last Changed	
Resp	Response		(a) Anter Angenes I (Consumy Name	Bidder Tame ROBN BURDESS WACK		Response Version	Last Diarged	Response on Behalf

- Select the line with the Bidder Name.
- We use the Drop Down on Response on Behalf to select Create.

Entering the Surrogate Bid



On the RFx Information Tab, the buyer will enter any Questions from the Solicitation Header.

Create Document		
Submit Read Only Print Preview Check Close Save Export Import		
 You are not allowed to enter a tax jurisdiction code for country US You are not allowed to enter a tax jurisdiction code for country US You are not allowed to enter a tax jurisdiction code for country US 		A III
RFx Response Number 5500029351 RFx Number 5400006378 Status RFx Owner Ms. Theresa Watts Target Value 0.00 USD RFx Respo	rocess Submission Deadline 09/16/2013 17:00:00 EST Remaining Time Version Number Active Version RFx Version Number 6	0 Days 00:47:05
	ing	
Basic Data Questions Notes and Attachments		
Question	Reply Com	nment
The bidder has rea	d understands all terms and conditions: * Yes No	

Entering the Surrogate Bid



- On the Items Tab, the Buyer will enter the vendor's price in the Price field.
- To answer Questions, click the Details button and go to the Questions Tab.
- Click Submit to complete the surrogate bid.

bmit Read (Only Prat Pre	view Chec	ck Close Save	e Export Import	(Ø,
fou are not allow	wed to enter a t	ax jurisdiction o	ode for country U	6							- (m.) -
fou are not allow	wed to enter a t	ax jurisdiction o	ode for country U	6							
fou are not alloy	ved to enter a t	ax jurisdiction o	ode for country 0	s}				Response	on Rehalf		
Response No RFx Owner RFx Informa	No Therese V	Natta Targ	x Number 54000 get Value 2.00.0 s and Attachments	/SD RFx Respo	In Process Submission Deadline 05/15/20 onse Version Number Active Version RFx V Tracking	Arsion Number 6	Remaining Time	0 5898 00.4	2.12		
tem Dysnview	8										
Details Add t	en l Can	y Paste Deb	eter Calculate	Votue							
Cetals Act t		Product Type		Product Category	Product Callegory Description	Required Quantity	Submitted Quantity	Unit Price	Currency	Price Per	RFx / Response
1	Description				Product Category Description Interpreter: Foreign Language Hearing Impaired etc	Required Quantity 1.0			Currency I USD		RFx / Response BLD
Line Number	Description Interpreter	Product Type		Product Category			10	HR 6.0			
Line Number • 109	Description Interpreter	Product Type Material Material		Product Category	Interpreter: Foreign Language Hearing Impaired etc.	1.0	та 1.0	HR SO	usp I	1	202
Line Number • 1/9 • 2/9	Description Interpreter	Product Type Material Material		Product Category	Interpreter: Foreign Language Rearing Impaired etc. Interpreter Services Rearing Impaired	10	та 1.0	HR SO	USD USD	1	860 863
Line Number • 1/9 • 2/5	Description Interpreter	Product Type Material Material		Product Category	Interpreter: Foreign Language Rearing Impaired etc. Interpreter Services Rearing Impaired	10	та 1.0	HR SO	USD USD	1	860 863
Line Number • 109 • 219	Description Interpreter	Product Type Material Material		Product Category	Interpreter: Foreign Language Rearing Impaired etc. Interpreter Services Rearing Impaired	10	та 1.0	HR SO	USD USD	1	860 863

Demonstration and Exercise



Process Bid Invitation

◆ Create Surrogate Bid – Exercise 5.





- Output Upon completion of this lesson, you should be able to:
 - Describe how vendors respond to RFxs.
 - Create a surrogate bid.



LESSON 6: EVALUATE/ACCEPT BIDS AND CREATE PURCHASE ORDER AND CONTRACT

STATE INFORMATION TECHNOLOGY



Lesson 6 Learning Objectives



- Output Upon completion of this lesson, you should be able to:
 - Evaluate bids that have been submitted.
 - Accept bids and create contracts in SRM.

Responses and Awards



🤗 RFx - SAP NetWeaver Portal - Windows Internet Explorer	_ • X
	Options 🔻
Display RFx : <pre> Close Copy Check Close Rfx Responses and Awards Create Follow-on RFx Convert to Auction Export Print Preview Questions and Answers (0) Related Links _ </pre>	2 .
RFx Number 5400006687 Smart Number Web Site Design Project Type Request for Proposal Status Published Created On 09/25/2013 13:49:18 Created By Mr. Sam Hanvey, CPPB APM Time Zone EST Number of Suppliers 4 Number of Items 1 Version Number 6 Version Type Active Version External Version Number 5	
RFX Information Bidders Items Notes and Attachments Weights and Scores Approval Tracking	

- Vendor Bids can be viewed, compared, and awarded in Responses and Awards.
- Preference Calculations are not completed in SCEIS. The buyer must calculate the preferences. The preference calculator is available at <u>www.procurement.sc.gov</u>.

Response Comparison



Response	es and Awards - SAP NetWeaver P	ortal - Windows Internet Explorer						
								Options <
Resp	onses and Awards							
Print	Preview 🗘 Close Exp	ort Questions and Answers (0) Sy	/nopsis					0.
Rema	ining Time 0 Days 00:00:00	Smart Number Web Site Design P	roject Type Request f	ior Proposal	Status Published	Number of	Suppliers 4	RFx Number <u>5400006687</u>
	Response Activity Res	ponse Comparison Surrogate	Bidding					
	Compare Selected Responses	Compare All Responses Simple Co	omparison 👻					
Ē	Response Number	Response Version	Company N	Vame			Bidder Name	
	<u>5500029386</u>		COMPUCO	OM SYSTEMS	INC		JED SHROPSH	HIRE
	5500029384		WEB ENK				MARK WAYNE	E-HART
	<u>5500029385</u>		WEBB DES	SIGNS INC			DAVID KOPPE	SER

- To print a hardcopy bid tab:
 - Click Responses and Awards.
 - Click Response Comparison Tab.
 - Click Compare All Responses. (continued)

Response Comparison



nses and Awards -	SAP NetWeaver Port	tal - Windows Internet Exp	lorer						
									Options 🔻
sponses an	nd Awards								
Edit Print Pre	eview 🗘 Clo	ose Export Question	s and A	nswers (0) S	ynopsis				0
maining Time 0 D	ays 00:00:00 S	Smart Number Web S	ite Desi	ign Project	Type Request for Proposal	Status Published	Number of Su	opliers 4 RFx N	umber <u>5400006687</u>
			-						
Response A		onse Comparison		gate Bidding					
Details Display	Bidders Exclude	Options: Compa	arison D	Date: 10/04/201	3 Back to Response Comp	arison Main View	Download Respon	ise Comparison	
Details Display		Options: Comp	arison C)ate: 10/04/201	3 Back to Response Comp	arison Main View			
	Item Details	1					JED S	HROPSHIRE : COMF	PUCOM SYSTEMS INC
Item Number	Item Details	₩ Item Description		Date: 10/04/201	3 Back to Response Comp RFx Required Quantity	arison Main View	JED S Unit Action	HROPSHIRE : COMP	PUCOM SYSTEMS INC Submitted Quantity
Item Number	Item Details	☞ Item Description <u>All Items</u>					JED S Unit Action	HROPSHIRE : COMP Action Description Accept All	
Item Number • 1 • 2	Item Details	Item Description All Items					JED S Unit Action	HROPSHIRE : COMF Action Description Accept All Reject All	Submitted Quantity F
Item Number	Item Details	☞ Item Description <u>All Items</u>					JED S Unit Action	HROPSHIRE : COMP Action Description Accept All	
Item Number • 1 • 2	Item Details	Item Description All Items					JED S Unit Action	HROPSHIRE : COMF Action Description Accept All Reject All	Submitted Quantity F
Item Number • 1 • 2	Item Details	Item Description All Items					JED S Unit Action	HROPSHIRE : COMF Action Description Accept All Reject All	Submitted Quantity F
Item Number • 1 • 2	Item Details	Item Description All Items					JED S Unit Action	HROPSHIRE : COMF Action Description Accept All Reject All	Submitted Quantity F

- (... to print hard copy Bid tab)
 - Click Download Response Comparison.
- This generates an Excel file which can be printed and saved.

Response Activity



							C
ponses and Aw	ards						
Preview 🗘 Close	Create Follow-on RFx	Export Questions and Answers (0)	Synopsis				
aining Time 0 Days 00:00	0:00 Smart Number	Web Site Design Project Type Re	quest for Proposal	Status	Published Number	of Suppliers 4	RFx Number 540000
Response Activity	Response Comparisor						
Response Activity	Behalf ∡ Return Respons	se Contract Mass Update					Expand
Response Activity		Se Contract Mass Update Company Name	Bidder Name	Intent	Response Version	Last Changed	Expand Response on Behalf
Response Activity	Behalf ∡ Return Respons	se Contract Mass Update	Bidder Name	Intent ♦	Response Version	Last Changed 10/01/2013	
Response Activity Details Response On I Response Number	Behalf Response Status	Se Contract Mass Update Company Name	Bidder Name		Response Version		
Response Activity Details Response On I Response Number	Behalf Response Status	Company Name COMPUCOM SYSTEMS INC	Bidder Name	\diamond	Response Version		

- To print a hardcopy of an on-line bid:
 - Go to Response Activity Tab.
 - Click the Response Number to open the Bidder's response.

(continued ...)

Response Activity



	- • ×
	Options 🔻
Edit RFx Response:	
Read Only Print Preview Close Accept Reject Return Save Export	21
RFx Response Number 5500029386 RFx Name Web Site Design Project Status Submitted Supplier Name COMPUCOM SYSTEMS INC Target Value 0.00 USD RFx Number 5400006687	
Rfx Information Items Notes and Attachments Approval Tracking	
General Data Notes and Attachments Questions	
✓ Basic Data	
Bidder Contact Information RFx Response Information Supplier Name: COMPUCOM SYSTEMS INC Last Changed On: 10/01/2013 16:43:49 EST Contact Person Name: JED SHROPSHIRE Last Changed By: Mr. Sam Hanvey, CPPB APM	

- (... Hard copy online bid)
 - Click Print Preview.

Accepting Bids



- The Buyer has the ability to accept the vendor's bid entirely or only accept certain line items from the vendor's response.
- After the bid has been accepted, the buyer can create either a Contract or Purchase Order depending on the type of follow-on document indicated by the solicitation.

Accepting Bids



To accept a bid, go to the Response Activity tab in Responses and Awards. Click on the Response Number link to access the vendor's bid.

t Preview 🗘 Close	Create Follow-on RFx Expo	ort Questions and Answer	s (0) Synopsis				
aining Time 0 Days 00:22:35	Smart Number Interpret	ters services TTC Type	e Fixed Price Bid Status Publishe	d Numb	per of Suppliers 2	RFx Number 540000637	<u>78</u>
Response Activity	Response Comparison	Surrogate Bidding					
Response Activity	Response Comparison	Surrogate Bidding					
Response Activity Details Response On Beha							Collapse Ro
			Bidder Name	Intent	Response Version	Last Changed	Collapse Rov Response on Behalf
Details Response On Behr	alf 🕢 (Return Response) Co	ntract Mass Update	Bidder Name	Intent	Response Version	Last Changed 09/16/2013	
Details Response On Beha	alf (Return Response) Co Response Status	ntract Mass Update	Bidder Name ROBIN BURGESS MACK		Response Version		Response on Behalf

Creating Contract/PO



- Complex Purchases (over \$50K) Doc Builder is used to create award statements/intents from Contracts only. Therefore a contract must be created in order to issue an award document for any procurements over \$50,000.
- Small Purchases (between \$10K \$50K) You can create a contract if needed (not a one-time buy) but you are not required to post an award. Purchase orders are normally generated from this type of RFx.

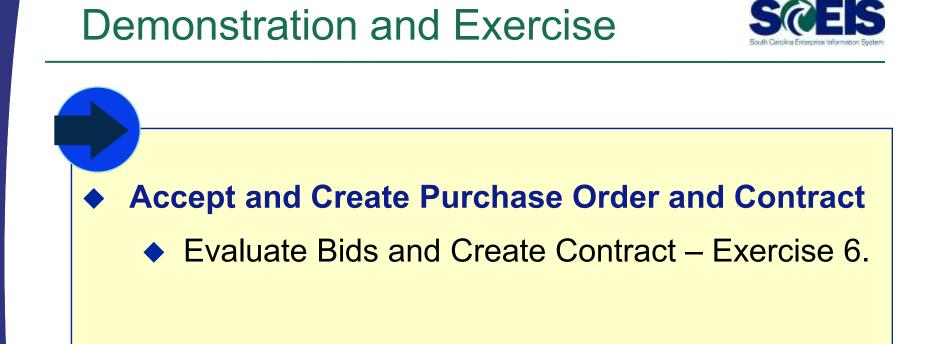
NOTE: Currently, it is not possible to post an award statement to the internet from a Purchase Order.

Creating Contracts



There are 3 types of contracts

- ZMMO
 - Statewide Contracts issued by SPO.
- -ZITM
 - Statewide Contracts issued by ITMO.
- ZAGY
 - Agency-specific Contracts issued by either SPO, ITMO, or an Agency.







- Evaluate bids that have been submitted.
- Accept bids and create contracts in SRM.



LESSON 7: MAINTAIN CONTRACTS AND AWARD STATEMENTS

STATE INFORMATION TECHNOLOGY



5C BUDGET AND CONTROL BOARD

Lesson 7 Learning Objectives



- Output Upon completion of this lesson, you should be able to:
 - Change contract data.
 - Understand SAP Document Builder's role in creating award statements.
 - Post award documents to the website.
 - Activate web posting date/time.
 - Send email award notification.

Strategic Purchasing -Contract Management



Dath Forward + Statury Fa	availas Parasadar View Hala					Seat		(4, +) so						
		E E E	ni li											
section teach liers	ur that													
1	Strangt Reducing + Discourse + Card	tach Managarisett						PatiSecon Change						
teh Dramme														
Integer Scotting	Active Garries													
ntract Unitegerment namme Partnert related Redenriketter	Central Contrains Alt (B) Toma Busts Arrangements ALCO Total Docarsett Output Latt 2 doct.0		481											
This are second a think	Central Contractor - AN													
Carly of the second second second	Ceveral Contracts - Alt													
	Central Contracts - All (+ Share Opick Criteria Mathematics)													
witted Dearth	• Shaw Gyick Criteria Mathematica	David Cartal Contract of Them. 1 (1999) - 1 (1999) - 10	with the with the better pro-	There is the second second				7.8						
entent Salarut. Ma Documenta	• Shaw Gyick Criteria Mathematica	Deas Central Lament + Tany James (Mr.) Mere (Kerps (A	tern terretar Bata bottanpe a Pr	Renami Defram Deprita	Supplier	Vaid From	yest to	V B						
nted Search Ar Documents articul	(+ Shaw Gylck Criteria Mamanance.) View: (Renderit View) •	and the second se		description of the second s	Supplier Marks, The standard state of the -states we	Vaid From screepers	Share To							
ntert Saarah Ar Documenta Artual Artual	Shew Guich Orders Mammana () View: (Nender) View) () Central Contract/Nender	Central Contract Name	Status	Radiening Organization				Fields						
ernet Saarst Ar Dooareersta ofisial ofisial ofisial Arrangementa	Show Guid Crists Itematon Vess: [file-devi Vess] Conte Contectioner Attomación	Gentre/Contract Name Recovery AuditContract (RACIAsionates	Status Released	Rastneing Organization BCBS Randoning Organization	HEALTH MANAGEMENT BY STERS WE	32104(0213	82/20/2119	fixedy						
nteel Search Na Goursennik Histori Histori Historia	Shew Guid China Managana, Vian (Denter Vinn) *) Certe Convertienter Attemption	Central Contract Name Recovery Audit Science (ALCS Scientes) ANTERCAR Investiga, Mantenance	Status Animanad Savesi	Rastwarg Organization BCER Randonang Organization BCER Parchaserg Organization	HEAS, TH MANAGAMENT BY STERS WE REMOVE BY STEMS REPORTATION LLC	8268,0013 62719/2013	82/86/2018 82/10/2018	Fields						
vennet Saarst nate Rocconnets Gertrad Garbard Tempela Sarbard Tempelants	Shere Geld Criste Manuscess. Viscol (Tenderi Vinn) -) Orette Center Center Administration encoder: 400004750	Every Automat New . New Yey AutoEvery AutoExected AUTOCARENAUTOR Verseults AUTOCARENAUTOR OF VERSEN	Status Released Second Assatting Approced	Randhaeing Organisation BCDIS Rochaeing Organisation BCDIS Perchaeing Organisation BCDIS Perchaeing Organisation	HEAS, TH MANAGUNERY BUSTERS WE HEMOTE SUSTEMS REPORTION LLD ALLES FLASTES CO. NC	80680011 60190013 01640012	80/06/01/18 80/10/2018 10/04/2010							
vennet Saarst nate Documenta Cartest Cartest Torques Sartes Arrespondo	Sheer Guid Crime Mannanese, Vaca: (film fair Virie) () Contra Centra Centra Centra (Automatica entere () film fair ()	Every account of theme Recovery Academics (NALESSICAtion ANDER Avery Society Nameseuse ALLER (NALTES CO EVE SELLAS) TODLS (SOCIET) ASCRAFT TRADets)	Status Released Second Avealing Approval Avealing Approval	Rodneing Organization BCBS Rothlang Organization BCBS Rothlang Organization BCBS Rothlang Organization BCBS Rothlang Organization	IN THE MARKAGEMENT & INSTERS WE REMOTE SUISTEMS INTRODUCTION LLC ALLES PLASTES CO. NC LIS TOOL BRIEFING NC	82094/0913 82719/0913 0169/0912 8501/0811	80/86/01/98 80/16/05/98 10/64/00/10 80/06/05/98							
vennet Saarst Kelle Documente Cartest Cartest Torques Gates Arragements	Sheer Guid Crime Mannanese, Vaca: (film fair Virie) () Contra Centra Centra Centra (Automatica entere () film fair ()	Every account of theme Recovery Academics (NALESSICAtion ANDER Avery Society Nameseuse ALLER (NALTES CO EVE SELLAS) TODLS (SOCIET) ASCRAFT TRADets)	Status Released Second Avealing Approval Avealing Approval	Rodneing Organization BCBS Rothlang Organization BCBS Rothlang Organization BCBS Rothlang Organization BCBS Rothlang Organization	IN THE MARKAGEMENT & INSTERS WE REMOTE SUISTEMS INTRODUCTION LLC ALLES PLASTES CO. NC LIS TOOL BRIEFING NC	82094/0913 82719/0913 0169/0912 8501/0811	80/86/01/98 80/16/05/98 10/64/00/10 80/06/05/98							
Bernies Restant Daarch Nade Docenervin Gantag Gantag Hongen Gantag Artengenertin Gantag Artengenertin Onegang Busalters in Termol D	Sheer Guid Crime Mannanese, Vaca: (film fair Virie) () Contra Centra Centra Centra (Automatica entere () film fair ()	Every account of theme Recovery Academics (NALESSICAtion ANDER Avery Society Nameseuse ALLER (NALTES CO EVE SELLAS) TODLS (SOCIET) ASCRAFT TRADets)	Status Released Second Avealing Approval Avealing Approval	Rodneing Organization BCBS Rothlang Organization BCBS Rothlang Organization BCBS Rothlang Organization BCBS Rothlang Organization	IN THE MARKAGEMENT & INSTERS WE REMOTE SUISTEMS INTRODUCTION LLC ALLES PLASTES CO. NC LIS TOOL BRIEFING NC	82094/0913 82719/0913 0169/0912 8501/0811	80/86/01/98 80/16/05/98 10/64/00/10 80/06/05/98							
vennet Saarst Kelle Documente Cartest Cartest Torques Gates Arragements	Sheer Guid Crime Mannanese, Vaca: (film fair Virie) () Contra Centra Centra Centra (Automatica entere () film fair ()	Every account of theme Recovery Academics (NALESSICAtion ANDER Avery Society Nameseuse ALLER (NALTES CO EVE SELLAS) TODLS (SOCIET) ASCRAFT TRADets)	Status Released Second Avealing Approval Avealing Approval	Rodneing Organization BCBS Rothlang Organization BCBS Rothlang Organization BCBS Rothlang Organization BCBS Rothlang Organization	IN THE MARKAGEMENT & INSTERS WE REMOTE SUISTEMS INTRODUCTION LLC ALLES PLASTES CO. NC LIS TOOL BRIEFING NC	82094/0913 82719/0913 0169/0912 8501/0811	80/86/01/98 80/16/05/98 10/64/00/10 80/06/05/98							

- Contracts appear in a list.
- Quick Criteria Maintenance allows buyers to search for contracts.
- Contracts must have a status of Released in order to be Valid.

Contract Overview



Display Agency Value Cont. 4400006324	
Close Remote PEde Copy Check C Ranew Prot Preview Export Related Links -	
Contract Number 400008324 Smart Number Recovery AudiContract (RAC/Solicitation Contract Type Agency Value Cont. Status Released Supplier 2000270200 HEALTH MANAGUMENT SYSTEMS BIC Contract Owner	10107. Store Manuel. SPER
Dverview Header Rens Notes and Attactments Conditions Authorization Approval Tracking	
General Header Data	
Contract Number 4400006228 Contract (RAC)Solidation	
Suppler * 7000070208 HEALTH MANAGEMENT SYSTEMS NC Contract Owner: 19587 Etra Manoa, C779	
Valid From / To: * 02/05/2013 - 02/05/2018 Target Value/ Currency: 1.000.005.00 USD	
Purchasing Organization * SEES Purchasing Organization Release Value: 8.00 USD	
Purchasing Group * WHO - C. Nanoe Ebuw, Marcheca Basic Contract:	
▼ lara	
Detaile Solent's Add.ten's Exercise Option Copy Points Doublam Debits	
Line Number Stein Category Stein Number Description Product Category Target Guantity Option Status Unit Target Value Price Currancy Tatar Value Price Fer Price Unit Reference Item Number	
1 Normal 10 Contraport 1 % 0.00 10/00 10 0	
2. Nurmel 20 Undergayments 1 % 0.00 950 USD 1 % 0	

The contract Overview shows:

- Valid From/To
- Target Value
- Overview of Line Items
- Output Use the Edit button to change the contract.

Items



The Items tab shows a list of items on the contract. The details of the line items are included in the tabs at the bottom of the window.

	· asymmetrys	Smart Ram	the Recto	ry Automat Bathane	e. Cantract 7	Me years an	ter the	States	Robust	Supplier 2	REPUBLIC HALT	I WHEN DO	BAR \$1.575	U.S. Contract Owner 11227 Document	18.072	
Darras	****	Barra	forme and it	Ballenia Carilles	Advertigen	-	Taing									
- 50-10																
				week to start and the start of the												The S
) in finite	See Celepry					Target Galenty	Cortes Date	#1.11#				 Prosider 	free 3H	Reference from Tainbar	Dettutes	Ben Lood Seve
1	No. 14		29	Cartagency Rais Chargement				-		4.4.0 LINE		-				
-	-	-						-								
			12 10 10 10 10	Charles Presented			_									
and a low of	NR OPP			prest Tables and Adapt	nen As	ni a Perina	(Report	a da	-							
- 200	NN DA	fere) 4	united Analy	net have all disc	treds As	roa Pelaa	- Paperson		-	_	_	_		Contracting, Values and Pricing		_
- 200	tele (Devi	fere	urrent Anny	net has a day	trada As	nos Pelas	(C Report		wane (Currency, Volum, and Pricing Target Volum Currency	. 130 MB	
- 200	lana (and	nera i a parte be	uccentri Annes Luccher: (1) 1-Tages: (1)	1964 (1966) (1966) (1966) 1967 (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1	1989 A.	nina Perwa	They man		wante (till uit V S	1
-	inte Canad	nere a parti ter ber	usand Anny Lorden: (1) 1-Type: (1) 1-Type: (1)	1964 (1966) (1966) (1966) 1967 (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1966) (1		noa Pelaw	(Thyraed		199994					Target Value Currency		
- 200	ine (red	tere i a parte terizen feri	uccentral Assess and the second assessment of the second s	nen internet		no al Petrier	- Normal		*****					Target Value Currency Target Quantity Inte	1.06	
- 200	in Del	tere i a teri teri teri teri teri	antes (1) - Type (Ma pry * Ma ded 0 - Type (Sa	nant Taxa and Adad			i Payment		*****					Target Value Currently Target Guardiar Init Rosa	1.06	
₩ jaan Marithutun		tere i a parte terizen feri	antes (1) - Type (Ma pry * Ma ded 0 - Type (Sa	nant Taxa and Adad	trents Au		- Ny met		*****					Target Value Currency Target Guestign (n.e. Paus Tau Carlos	1 % 155 000 m 1 %	
₩ Daan		Bana Danis Bana Danis Bana Danis Bana Danis Bana Danis	ushaf Anny n'yan Yan yay ' An fast D yay ' An yay ' An	nnet) Tatos ant Adad not Na Digenta Gel O-manyment Digenta Gel O-manyment Di) C Payment		19994					Target Value Currency Target Subartile Line Page Tar Line Line Temper Substri	1 N 151 (100 pr 155	
Technol Property		Bana Danis Bana Danis Bana Danis Bana Danis Bana Danis	antes (1) - Type (Ma pry * Ma ded 0 - Type (Sa	nnet) Tatos ant Adad not Na Digenta Gel O-manyment Digenta Gel O-manyment Di			Count		YANN .					Target Haan Currency Target Bandhol Hit Rose Tar Colle Band Tempart Gauntly Bat Separating Prival	1 % 155 000 m 1 %	

Creating Award Statements/Intents



Disp	lay Agen	cy Value C	ont. 4400	0006324			
Close	e Release	/ Edit Copy	Check 🗘	Print Preview	Export	Related Links 4	
						Approved Supplier Li	ist
🗹 Va	alid from date (02/05/2013 must	be equal or late	er than FM post	ing date 0	Maverick Spend for (Contracts
V Vo	ou are not allo	wed to enter a ta	x jurisdiction co	ode for country	US	Supplier Evaluation	
Co	ontract 440000	6324 saved				Supplier Portfolio Document Builder	
		1				Document Builder	
Cont	tract Number	r 4400006324 (0	Change Version	n) Smart	Number	Recovery AuditContra	act (RAC)Solid
/	Overview	Header	Items	Notes and A	ttachment	s Conditions	Authorizatio
▼ It	ems						
	etails Selec	t∡ Add Item∡	Exercise Opt	ion Copy P	aste Du	plicate Delete	
Ē	Line Number	Item Category	Option Type	Item Number	Descrip	tion	Product Cat
	<u>1</u>	Normal		10	Continge	ency Rate Overpayment	t 96339
	<u>2</u>	Normal		20	Underpa	yments	96339

- Access Doc Builder from Related Links to generate an award document.
- The Contract must be in Saved Status.
- Oc Builder functionality is the same as in the RFx.
- There is a series of four dialog questions to answer.

Posting Award Statements/Intents



ange Agency Valu	e Cont. 4400006324											
ead Only Cose Releas	e Save Check Lock Close C	Contract Print Preview Export Import Pa	k Related Link	54								
ontract Number 440000633	4 (Charge Version) Smart Nu	imber: Recovery AudiContract (RAC)Solicitat	en Contra	ct Type Agency Value Co	nt. Status	In Process Si	oplier 7000070208 HEALTH MA	NAGENENT SYSTEKS INC	Contrac	t Owner <u>10587 (</u>	Chris Hanos, CPPB	
Overview Header	tens Rotes and Atta	chments Conditors Authorization	Approval	Tracking								
• Notes												1
Add a Cest												Fiter Seting
Assigned To Category			Text Preview									
Atachnenia												
Add Attachment Edit Desc	ription Versioning 🖌 Delete 🕽 🖙	este Quelification Profile										Fiter Seting
Assigned To	Category	Description		File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Standard Attactment	Document Builder Goc 000000000115	8	FLE0001	1		2	0	pdf		JWAITES	09/17/2013
Document Header	Standard Attachment	Intent to Award		FLE0001	1		0.		dec	28	JWAITES	09/17/2013

- The award document appears on the Notes and Attachments Tab.
- To edit the document, it must be saved to your computer/network drive, edited, and uploaded to the contract.
- When the contract is released, any document not marked "Visible Internally Only" will be published to the website.

ZMM_BUYER



I I I I I I I I I I I I I I I I I I I	Accidation Mainter Purchasing Replicate Custrects
BUYER	
Buyer > 28M_BUYER	
enu Back Ext Cancel System	
end i Dack Call Gancer Sprend	
	1
Solicitation Notification	Reparts
E-mail Solicitation Notification	E-mail Notification Report
E-mail Solicitation Notification	E-mail Notification Report
E-mail Solicitation Notification	E-mail Notification Report
E-mail Solicitation Notification	E-mail Notification Report
E-mail Solicitation Notification	E-mail Notification Report
E-mail Solicitation Notification	South Carolina Business Opportunities (SCBO)
Award Notification	South Carolina Business Opportunities (SCBO)
Award Notification	
Award Notification	South Carolina Business Opportunities (SCBO)
Award Notification	South Carolina Business Opportunities (SCBO)

- Transaction used to send e-mails to vendors regarding solicitations and awards.
- Used to report on notifications sent by the system.
- Used to re-advertise a solicitation in SCBO.

Demonstration and Exercise



Exercise 7 Edit Contract and Create an Award Document.

 ZMM_Buyer Award Email Notification – Demo only.

Lesson 7 Summary



- You should now be able to:
 - Change contract data.
 - Understand SAP Document Builder's role in creating award statements.
 - Post award documents to the website.
 - Activate web posting date/time.
 - Send email award notification.



LESSON 8: CLOSE RFX

STATE INFORMATION TECHNOLOGY



5C BUDGET AND CONTROL BOARD

Lesson 8 Learning Objectives



- Output Upon completion of this lesson, you should be able to:
 - Understand when to mark a RFx "Transaction Completed."

Close RFx



When to close an RFx:

- After you have created, published, and issued your Intent to Award or Statement of Award, you may Close the RFx.
- The RFx should not be closed until the protest period/process is complete.
- No additional processing can occur on an RFx that is closed.
- The solicitation can still be searched and viewed within SRM.

Close RFx



🦪 RFx - SAP NetWeaver Portal - Windows Internet Explorer 🛛

Display RFx :
Close opy Check Close Rfx Responses and Awards Convert to Auction Export Print Preview Questions and Answers (0)
RFx Number 5400006645 Smart Number Art Supplies for DHEC Type Invitation For Bid Status Published Created On Time Zone EST Number of Suppliers 3 Number of Items 2 Version Number 4 Version Type Active Version
RFX Information Bidders Items Notes and Attachments Weights and Scores Approval Tracking
RFx Parameters Questions Notes and Attachments Table Extension
Identification Event Parameters

The Close button simply closes the window.

The Close RFx button will complete the RFx. You will not be able to make changes, accept bids or make awards after the RFx is completed.





- You should now be able to:
 - Understand when to mark a RFx "Transaction Completed."

Course Summary



- Describe Complex/Small Purchases.
- Describe the Procurement Process Flow.
- Redistribute Workload.
- Create RFx.
- Complete RFx.
- Create a Document using Document Builder.

Course Summary cont.



- Edit a document using MS Word.
- Publish an RFx.
- Publish an Amendment.
- Create Surrogate Bid.
- Accept Bids and Create Purchase Order and/or Contract.

Course Summary cont.



- Edit contract data.
- Use Document Builder to create award documents.
- Post award documents to the website.
- Activate web posting date/time.
- Send E-mail notifications.
- Understand when & how to close an RFx.

Any Questions?









Additional support and reference materials

 You can access additional support and print step-by-step procedures on the SCEIS uPerform website.

Go to the SCEIS website at http://www.sceis.sc.gov, click Training, then click SCEIS uPerform





Please complete the online course evaluation in Blackboard.

Your input will help to shape future enhancements to the SCEIS End User Training Program

Go to the SCEIS website http://www.sceis.sc.gov_click on Training and then click Blackboard