



# **SUBMITTING AND MANAGING BIDS AND OVERVIEW OF CONTRACT MANAGEMENT PR235**

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



# Welcome and Introductions

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## Welcome to SCEIS Bidding Processes

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

# Classroom Logistics

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- ④ Classroom etiquette
  - Cell phones off/silence
  - No side conversations
- ④ Feel free to ask questions
- ④ No email or internet usage during class except at breaks

# Course Learning Objectives

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- ① Upon 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

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- ① 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.

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- ① Upon 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

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



# LESSON 1: DIFFERENCES BETWEEN COMPLEX AND SMALL PURCHASES RFX



# Lesson 1 Learning Objectives

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- 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.

# RFxs - Types

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- ① RFx is the SAP 7 term for the bidding transaction types equivalent to the methods of source selection referenced in the Code.

# Small Purchases

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## **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

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## **Question:**

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

## **Answer:**

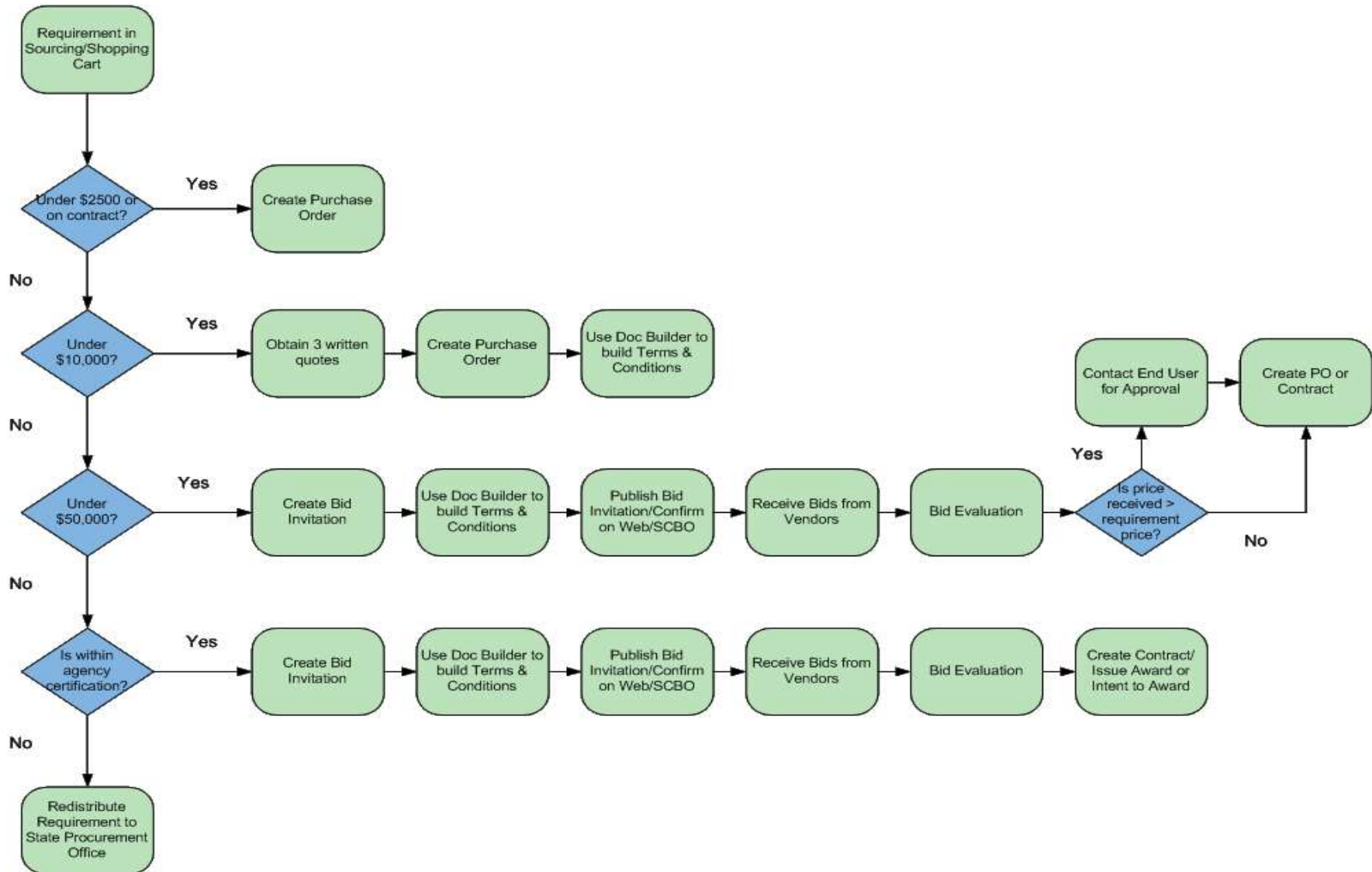
Buyers will use complex bidding when the total value of the RFx is estimated to be greater than \$50,000. End result will be a contract.

# RFxs - Types

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- ① 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

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- You should now be able to:
  - Define the term RFX.
  - Describe the difference between Small Purchase RFX and Complex RFX.



# LESSON 2: WORKLOAD REDISTRIBUTION



# Lesson 2 Learning Objectives

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- 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 Workload

Find Documents

Requirements	Purchase Orders	Bid Invitations	Contracts
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purch. Organization	Purchasing Group	Status	
SCEIS Purchasing Organization <input type="button" value="v"/>	Vocational Rehabilitation <input type="button" value="v"/>	All <input type="button" value="v"/>	
Product	Product Category	Vendor	
<input type="text"/> <input type="button" value="M"/>	<input type="text"/> <input type="button" value="M"/>	<input type="text"/> <input type="button" value="M"/>	
Delivery Date/ValidityPeriod/Submission Deadline	Document Number		
<input type="text"/> <input type="button" value="C"/> - <input type="text"/> <input type="button" value="C"/>	<input type="text"/>		
<input type="button" value="Start"/>	<a href="#">Simple Search</a>	<a href="#">Reporting Workload</a>	

# Workload Redistribution

The screenshot displays the SAP SRM Application interface for Workload Redistribution. The left sidebar shows a navigation menu with 'Workload Redistribution' selected. The main content area is titled 'SRM Application' and contains a 'Search for Documents' section. Below this, there are search filters: 'Document Types' with 'Requirements' checked, 'Status' set to 'In Process', 'Purchasing Organization' set to 'SCEIS Purchasing Organization', and 'Purchasing Group' set to 'ITMO - Acquisition Manager'. There are also fields for 'Document Number' and 'Delivery Date / Validity Period / Submission Deadline'. A 'Search' button is visible. Below the search filters, a 'Search Result: 3 Documents' table is shown with columns for Document number, Document name, Type, Status, Purchasing Organization, and Purchasing Group. The table contains three rows of data.

Document number	Document name	Type	Status	Purchasing Organization	Purchasing Group
2000481770 / 1	Software, Microcomputer (Not Otherwise C		In Process	SCEIS Purchasing Organization	ITMO - Acquisition Manager
2000482888 / 1	"cups"		In Process	SCEIS Purchasing Organization	ITMO - Acquisition Manager
2000485591 / 1	Police Pursuit Tire		In Process	SCEIS Purchasing Organization	ITMO - Acquisition Manager



Used to:

- 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

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**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

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- 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

# Lesson 3 Learning Objectives

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- 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

**Sourcing**

Worklist Find

Display  ▼

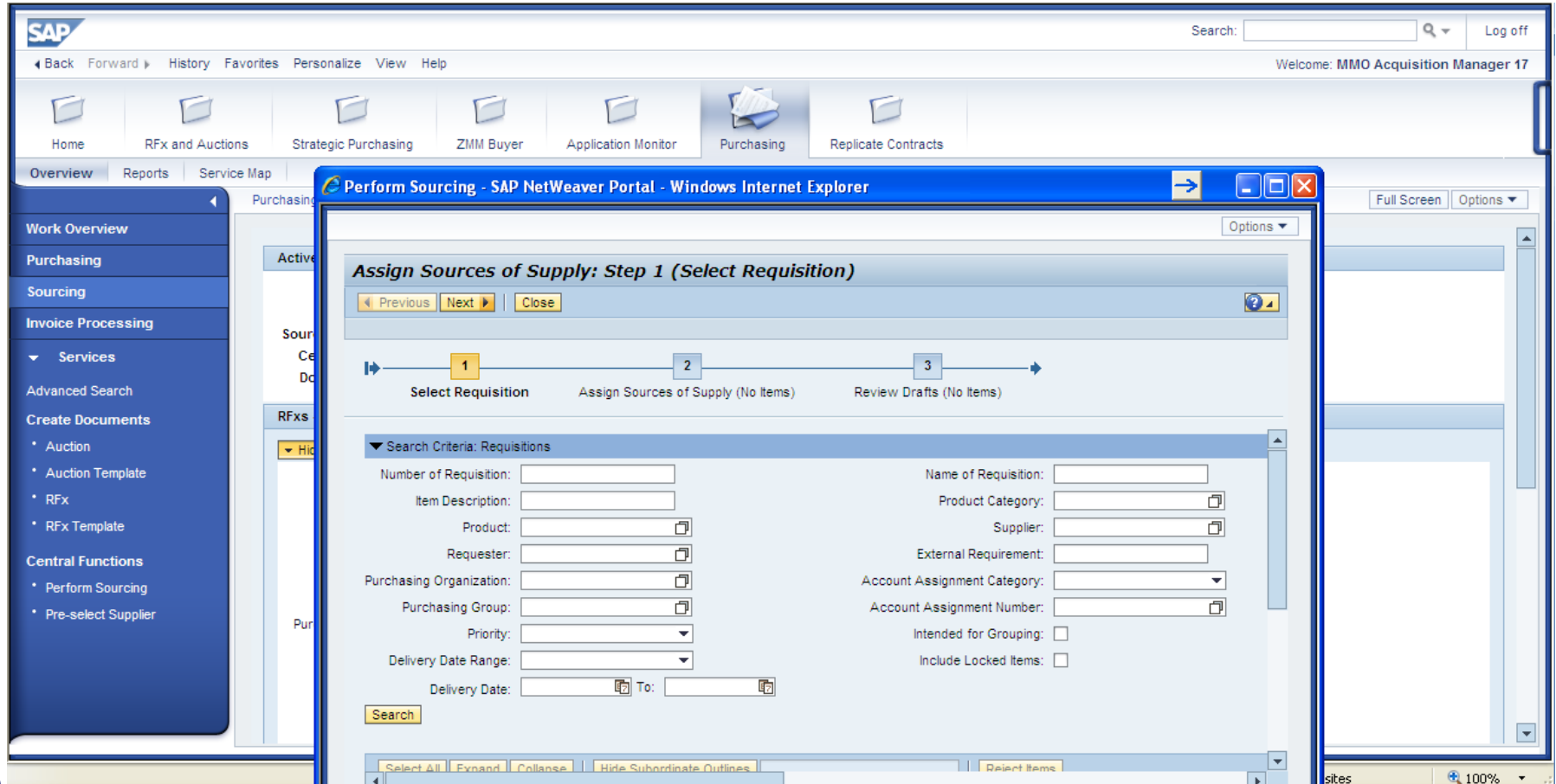
**Overview of Requirements**

<input type="checkbox"/>	Description	Category	Quantity	Requester	Name of Vendor	Requirement ▲	Contract	Bid Invitation Name	Inv
<input type="checkbox"/>	Single Engine Airplane	Airplanes	1 each	Tracy Hill		<a href="#">2000015698/1</a>			
<input type="checkbox"/>	30 KW Standby Generator 104 Amps	Generators Stationary Type (Not Automotive)	10 each	Tracy Hill		<a href="#">2000015722/1</a>			
<input type="checkbox"/>	30 KW Standby Generator 125 Amps	Generators Stationary Type (Not Automotive)	10 each	Tracy Hill		<a href="#">2000015726/2</a>			

Add to Work Area Refresh



# Perform Sourcing



The screenshot displays the SAP NetWeaver Portal interface for 'Perform Sourcing'. The browser window title is 'Perform Sourcing - SAP NetWeaver Portal - Windows Internet Explorer'. The page header includes a search bar, 'Log off' link, and a welcome message: 'Welcome: MMO Acquisition Manager 17'. The navigation bar contains icons for Home, RFX and Auctions, Strategic Purchasing, ZMM Buyer, Application Monitor, Purchasing, and Replicate Contracts. A left-hand navigation menu lists various functions such as Work Overview, Purchasing, Sourcing, Invoice Processing, Services, Advanced Search, Create Documents, and Central Functions. The main content area is titled 'Assign Sources of Supply: Step 1 (Select Requisition)'. It features a progress bar with three steps: 1. Select Requisition (active), 2. Assign Sources of Supply (No Items), and 3. Review Drafts (No Items). Below the progress bar is a 'Search Criteria: Requisitions' section with various input fields for filtering requisitions, including Number of Requisition, Item Description, Product, Requester, Purchasing Organization, Purchasing Group, Priority, Delivery Date Range, Delivery Date, Name of Requisition, Product Category, Supplier, External Requirement, Account Assignment Category, and Account Assignment Number. A 'Search' button is located at the bottom of the search criteria section.

# Perform Sourcing – Step 1 Select Requisition

Perform Sourcing - SAP NetWeaver Portal - Windows Internet Explorer

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

Previous Next Close

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

Search Criteria: Requisitions

Number of Requisition:  Name of Requisition:   
Item Description:  Product Category:   
Product:  Supplier:   
Requester:  External Requirement:   
Purchasing Organization: 0 5000001 SCES Purchasing Organization Account Assignment Category:   
Purchasing Group: 0 5000048 IMO - Acquisition Manager Account Assignment Number:   
Priority:  Intended for Grouping:   
Delivery Date Range:  Include Locked Items:   
Delivery Date:  To:

Search

Select All Expand Collapse Item Subscreen Outline All Categories Request Items

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Manufacturer Part Number
• 20000288201	Consulting Services	91000		1	EA		04/01/2008					
• 20000200601	Auctioneering Services (To include Inter	96209		1	EA		07/01/2010	700097507	TRICE BODER			
• 20000112501	Renewal of Enrollment Broker Contract	90316		1	EA	ANWARA MOCANNE	10/31/2010					
• 20004280001	RFP for Post Repair Project	91233		1	EA	BRIGITTE POORE	08/00/2012					
• 20004444301	Sell Standard Size Pallet	97504		1	EA	KATHRYN BAKER	00/04/2012					
• 20004444302	Selling Cardboard	97504		1	EA	KATHRYN BAKER	00/04/2012					
• 20004444303	Selling Colored Paper	97504		1	EA	KATHRYN BAKER	00/04/2012					
• 20004444304	Selling White Paper	97504		1	EA	KATHRYN BAKER	00/04/2012					
• 20004444305	Selling all other items	97504		1	EA	KATHRYN BAKER	00/04/2012					

- 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

Perform Sourcing - SAP NetWeaver Portal - Windows Internet Explorer

Assign Sources of Supply: Step 2 (Assign Sources of Supply ( 1 Items))

Previous Next Save Close

1 2 3 4

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

Select All Expand All Collapse All Change Refresh Propose Sources of Supply Create Draft Replace Item with Catalog Item Undo Replacement Remove Assign to My Purchasing Group

Requisition / Item Number	Document Name	Document Number	Draft Type	Item Number	RFX Number	Configurable Item Number	Description	Variant	Category Description	Priority	Quantity	Unit
21004260051							RFP for Pool Repair Project		Construction Swimming Pool		1	EA

- Use Create Draft drop down to select RFX.
- This will automatically move you to Step 3.

# Perform Sourcing – Step 3 Review Drafts

Perform Sourcing - SAP NetWeaver Portal - Windows Internet Explorer

Assign Sources of Supply: Step 3 (Review Drafts ( 1 Items))

Previous Next Process All Drafts Close Process Selected Drafts Edit Selected Drafts

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

Created Drafts

Change Selected Draft To Remove Settings

Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
JRSTEVENS 09/05/2013 15:45:59	Bid Invitation			

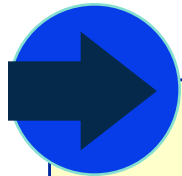
Details of Selected Drafts JRSTEVENS 09/05/2013 15:45:59

Remove Expand All Collapse All

Requisition / Item Number	Configurable Item Number	Description	Category	Quantity	Unit	Info Record	Net Price	Gross Price	Currency
2000428905 / 1		RFP for Pool Repair Project	91233	1	EA		1.00	1.00	USD

ZBVB : Best Value Bid  
ZFPB : Fixed Price Bid  
ZIFB : Invitation For Bid  
ZRFI : Req. for Information  
ZRFP : Request for Proposal  
ZRQL : RFQ - Qualification  
ZRQT : Request for Quote  
ZSMP : Small Purchase

- Use the drop down to select Transaction Type.
- Click Edit Selected Drafts to begin editing solicitation in a new window.



- ◆ **Purchasing**

- ◆ Sourcing – Exercise 1

# Lesson 3 Summary

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



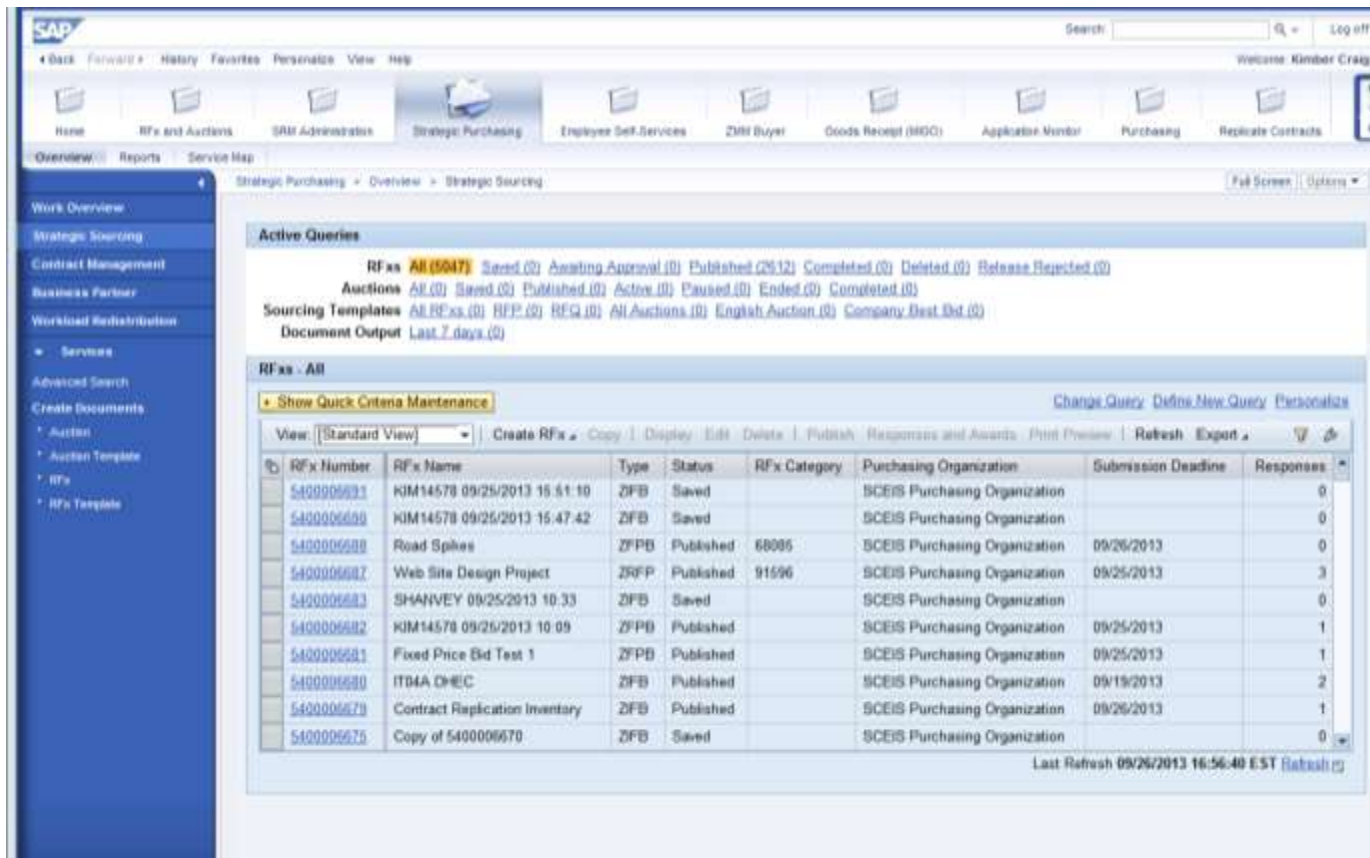
# LESSON 4: STRATEGIC PURCHASING

# Lesson 4 Learning Objectives

- 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



The screenshot displays the SAP Strategic Sourcing interface. The top navigation bar includes 'Home', 'RFx and Auctions', 'SRM Administrator', 'Strategic Purchasing', 'Employee Self-Services', 'ZMR Buyer', 'Goods Receipt (MIGO)', 'Application Monitor', 'Purchasing', and 'Replicate Contracts'. The 'Strategic Purchasing' menu is active, showing 'Overview' and 'Strategic Sourcing'. The 'Active Queries' section provides a summary of RFx and Auctions counts. Below this, a table lists various RFx documents with their details.

RFx Number	RFx Name	Type	Status	RFx Category	Purchasing Organization	Submission Deadline	Responses
5400006693	KIM14578 09/25/2013 15:51:10	ZFB	Saved		SCEIS Purchasing Organization		0
5400006699	KIM14578 09/25/2013 15:47:42	ZFB	Saved		SCEIS Purchasing Organization		0
5400006688	Road Spikes	ZFPB	Published	68095	SCEIS Purchasing Organization	09/26/2013	0
5400006687	Web Site Design Project	ZFPB	Published	91596	SCEIS Purchasing Organization	09/25/2013	3
5400006683	SHANVEY 09/25/2013 10:33	ZFB	Saved		SCEIS Purchasing Organization		0
5400006682	KIM14578 09/25/2013 10:09	ZFPB	Published		SCEIS Purchasing Organization	09/25/2013	1
5400006681	Fixed Price Bid Test 1	ZFPB	Published		SCEIS Purchasing Organization	09/25/2013	1
5400006680	IT&A DHEC	ZFB	Published		SCEIS Purchasing Organization	09/19/2013	2
5400006679	Contract Replication Inventory	ZFB	Published		SCEIS Purchasing Organization	09/26/2013	1
5400006675	Copy of 5400006670	ZFB	Saved		SCEIS Purchasing Organization		0

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

# Process Bid Invitation – SRM 5.0



## Change Invitation For Bid

Records Management Start Document Builder Publish Hold Check Refresh Delete Download Upload Output Preview

[Back to](#)

Name TRNSRM31001 12/29/2009 11:36:09 Number 5400001301

Header Data Item Data

Basic Data Partner Bidder/Bids Documents Attributes Weighting Additional Currencies Approval Preview Status Status Versions

Transaction Type	ZIFB Invitation For Bid
Product Category	<input type="text"/>
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	<input type="text"/> 00:00:00
End Date *	05/03/2010 14:30:00
Opening Date	05/03/2010 14:30:00

# Edit RFX – SRM 7.2

RFx - SAP NetWeaver Portal - Windows Internet Explorer

**EdR RFx: 5400005695**

Number: 5400005695    Smart Number: JRSTEVENS 09/05/2013 15:45:59    Type: Invitation For Bid    Status: Saved    Created On: 09/05/2013 15:45:32    Created By: Mr. John R Stevens    Time Zone: EST  
 Number of Bidders: 0    Number of Items: 1    Version Number    Version Type: Active Version    External Version Number

RFX Information    Bidders    Items    Notes and Attachments    Weights and Scores    Approval    Trading

RFX Parameters    Questions    Notes and Attachments

**Identification**

Smart Number: JRSTEVENS 09/05/2013 15:45:59  
 Smart Number is External  
 Name: JRSTEVENS 09/05/2013 15:45:59  
 Type: Invitation For Bid  
 Product Category:   
 Reason Code:

**Event Parameters**

Currency: USD  
 Target Value: 1.00 USD  
 Detailed Price Information: Simple Price  
 Follow-On Document: Contract  
 Bidder Can Change RFX Responses  
 Allow Multiple RFX Responses for Each Company  
 Display Weighting to Bidders

**Organization**

Purchasing Organization: SCES Purchasing Organization  
 Purchasing Group: UMU - Acquisition Manager

**Scenario Award/Contract**

SCBO Category:   
 No Award: False

**Dates**

Start Date: 09/05/2013 00:00:00  
 Submission Deadline: 09/05/2013 00:00:00  
 Opening Date: 09/05/2013 00:00:00  
 End of Bidding Period:   
 Valid From / To:  -   
 Award Posting Date:

**Partner and Delivery Information**

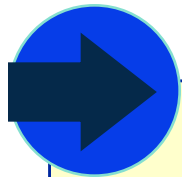
Filter Settings

Function	Number	Name	Phone Number
• Requester	24202	<a href="#">BRIGITTE POORE</a>	
• Goods Recipient	24202	<a href="#">BRIGITTE POORE</a>	
• Ship-To Address	34	<a href="#">SCES Bus</a>	864-351-0415
• Location	61	<a href="#">John de la House School</a>	

# Edit RFx – Helpful Hints

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- ④ Submission Deadline and Opening Date should be the same in order to seal bids from the vendor.
- ④ Do not enter a Product Category on the RFx Information Screen. The Product Category must be entered on the line item.
- ④ A bidder is required in order to publish a solicitation. Use SCEIS Bidder if a vendor is not known.
- ④ If creating an RFx without a shopping cart, you must enter the Location on the RFX Information Tab prior to publishing.



- ◆ **Strategic Purchasing**
  - ◆ Edit RFx – Exercise 2

# Document Builder

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- Doc Builder is a Compendium-based tool to help build solicitation and award documents.
- Doc Builder asks a series of questions to determine the clauses included in the document.
- Doc 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.
- Document Builder does not store or maintain data.

# Document Builder Functionality cont.



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

# SRM 5.0

### Display Best Value Bid

Records Management **Start Document Builder** Copy Check Change Refresh Close Download U

Name PR211 Small Purchases Number 5400001011

Header Data Item Data

Basic Data | Partner | Bidder/Bids | Documents | Attributes | Weighting | Additional Currencies | History | A

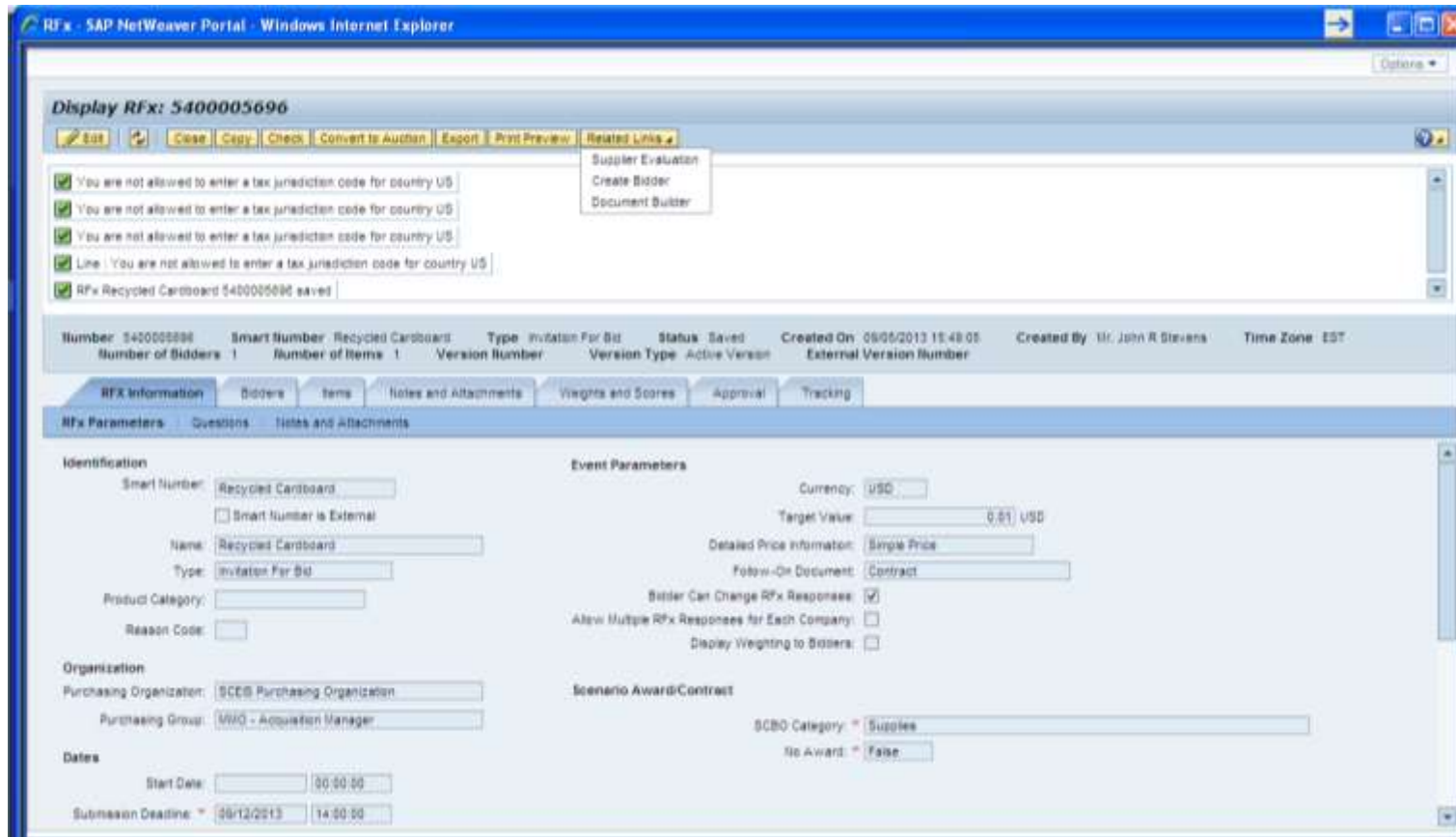
Transaction Type	ZBVB Best Value Bid
Product Category	
Type of Publication	Pub
Responsible Purchasing Organization	SC
Responsible Purchasing Group	740
Company Code	Sta
Start Date	
End Date *	02/28/2010 14:00:00
Opening Date	02/28/2010 14:00:00
End of Binding Period	
Time Zone	EST
Currency	USD United States Dollar
Detailed Price Information	Simple Prices
Bids Required for All Items	<input type="checkbox"/>

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



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

# Doc Builder 5.0 - Dialog



The screenshot shows the 'Document Builder' application window. At the top, there is a menu bar with 'Save', 'Edit', 'Copy', 'Release', 'Cancel', 'Refresh', and 'Logoff'. Below the menu bar is a tabbed interface with 'Header Data', 'Dialog', 'Document Summary', 'Preview', and 'Attachments'. The 'Dialog' tab is active.

The main area is divided into two panes. The left pane is titled 'Groups' and contains a tree view under 'Document Data Groups'. The tree view shows a hierarchy starting with 'DOC\_ROOT', which is expanded to show 'Source Selection' as the selected item. Below 'Source Selection' is a list of various procurement-related items, each with a red 'X' icon indicating it is selected or active. The right pane is titled 'Source Selection' and contains a section titled 'What is your Document Selection?' with an information icon. Below this title is a list of radio button options for document selection types.

**Document Builder**

Save Edit Copy Release Cancel Refresh Logoff

Header Data Dialog Document Summary Preview Attachments

**Groups**

Previous Next Finish with defaults

**Document Data Groups**

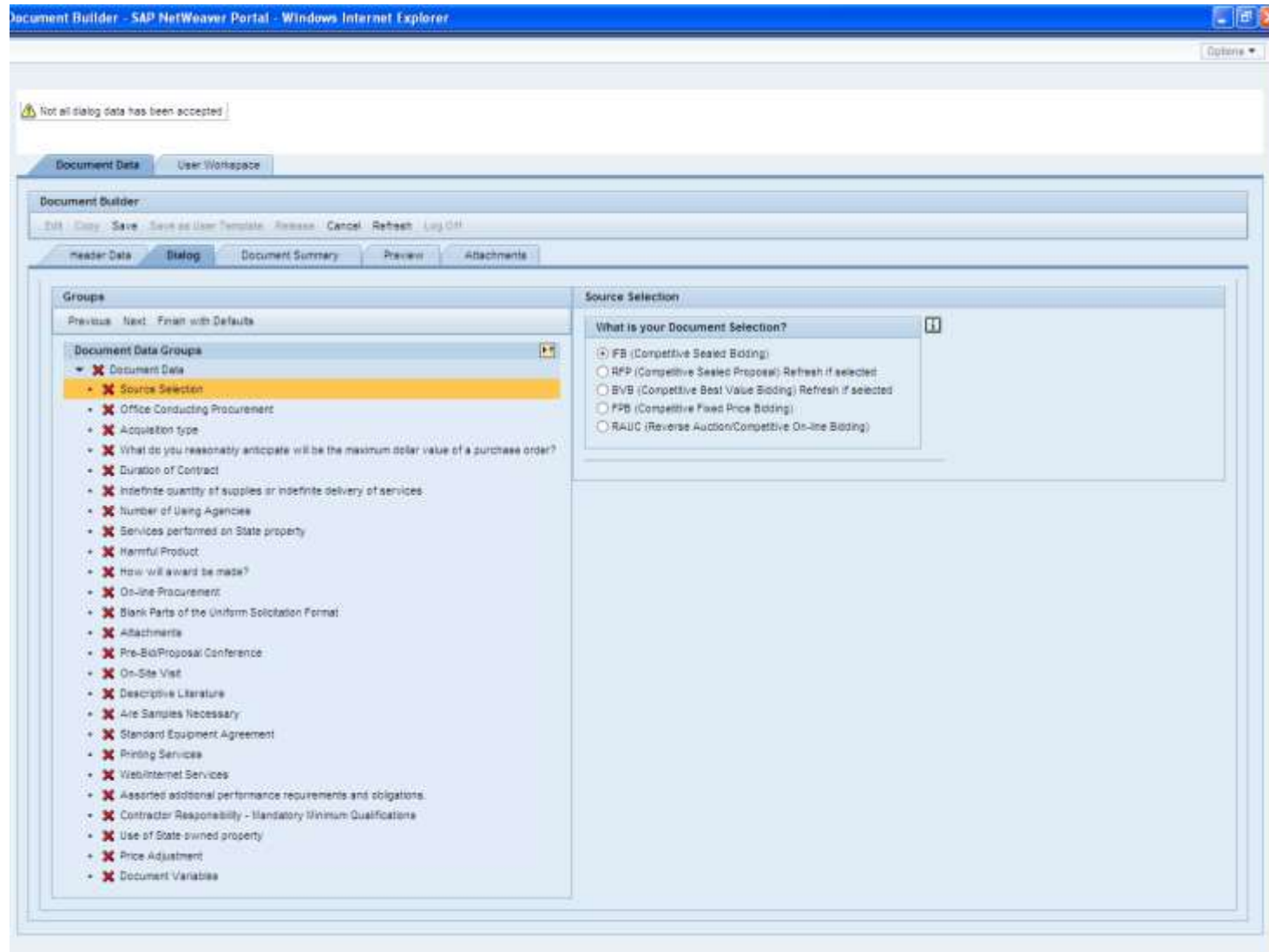
- DOC\_ROOT
  - Source Selection
    - Office Conducting Procurement
    - Acquisition type
    - What do you reasonably anticipate will be the maximum dollar value of a purchase order?
    - Duration of Contract
    - Indefinite quantity of supplies or indefinite delivery of services
    - Number of Using Agencies
    - Services performed on State property
    - How will award be made?
    - On-line Procurement
    - Blank Parts of the Uniform Solicitation Format
    - Attachments
    - Pre-Bid/Proposal Conference
    - On-Site Visit
    - Descriptive Literature
    - Are Samples Necessary
    - Standard Equipment Agreement
    - Printing Services
    - Web/Internet Services
    - Assorted additional performance requirements and obligations.
    - Contractor Responsibility - Mandatory Minimum Qualifications
    - Use of State owned property
    - Price Adjustment
    - Document Variables

**Source Selection**

What is your Document Selection?

- IFB (Competitive Sealed Bidding)
- RFP (Competitive Sealed Proposal) Refresh if selected
- BVB (Competitive Best Value Bidding) Refresh if selected
- FPB (Competitive Fixed Price Bidding)
- RAUC (Reverse Auction/Competitive On-line Bidding)

# Doc Builder 7.2 - Dialog



Document Builder - SAP NetWeaver Portal - Windows Internet Explorer

Not all dialog data has been accepted

Document Data User Workspace

Document Builder

File Edit Save Save as User Template Release Cancel Refresh Log Off

Header Data Dialog Document Summary Review Attachments

Groups

Previous Next Finish with Defaults

Document Data Groups

- Document Data
- Source Selection**
- Office Conducting Procurement
- Acquisition type
- What do you reasonably anticipate will be the maximum dollar value of a purchase order?
- Duration of Contract
- Indefinite quantity of supplies or indefinite delivery of services
- Number of Using Agencies
- Services performed on State property
- Harmful Product
- How will award be made?
- On-line Procurement
- Blank Parts of the Uniform Solicitation Format
- Attachments
- Pre-Bid/Proposal Conference
- On-Site Visit
- Descriptive Literature
- Air Samples Necessary
- Standard Equipment Agreement
- Printing Services
- Video/Internet Services
- Assorted additional performance requirements and obligations
- Contractor Responsibility - Mandatory Minimum Qualifications
- Use of State-owned property
- Price Adjustment
- Document Variables

Source Selection

What is your Document Selection?

- FB (Competitive Sealed Bidding)
- RFP (Competitive Sealed Proposal) Refresh if selected
- BVB (Competitive Best Value Bidding) Refresh if selected
- FPB (Competitive Fixed Price Bidding)
- RAIC (Reverse Auction/Competitive On-line Bidding)

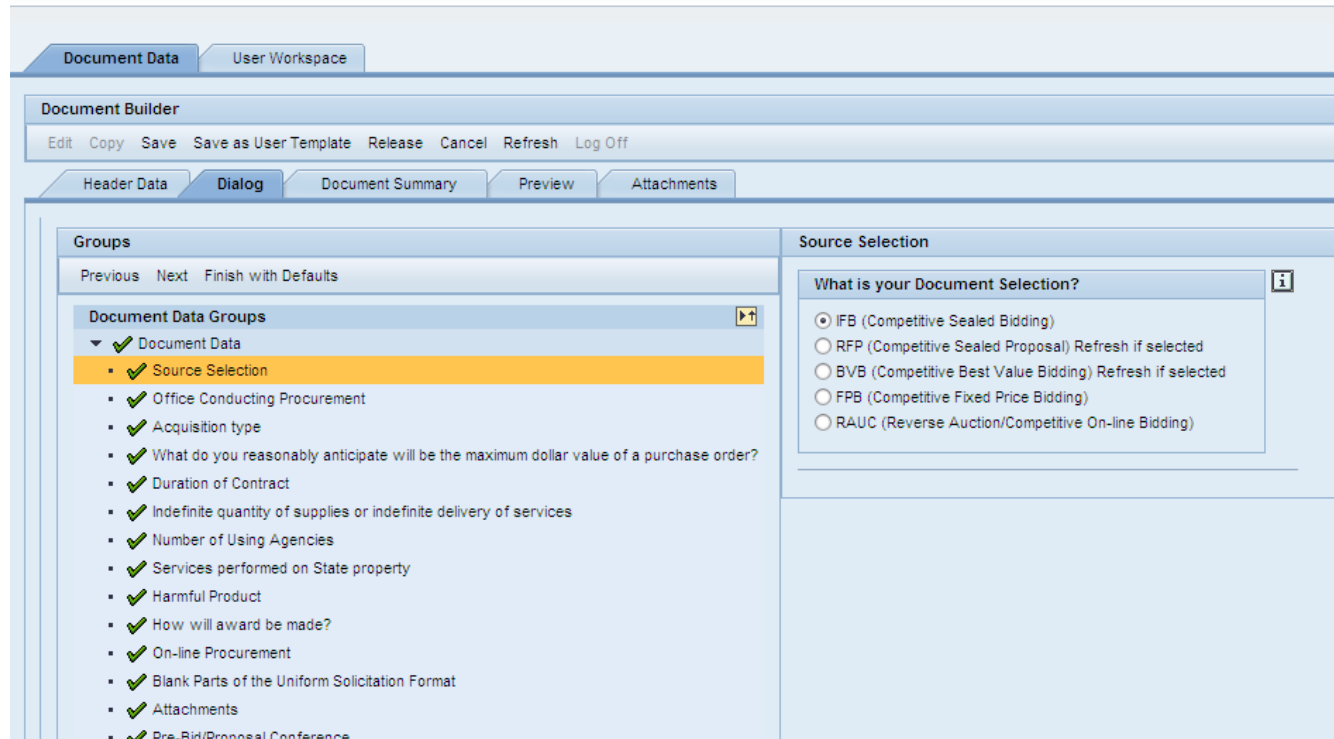
# Document Summary

Position	Section	Element	Effective Date	Version	Regulation Set	Property	Description	Estate	Inclusion	File Status	Con
1	D-A	SC_S1_000_1	11/18/2006		COMPENDIUM	Full-Text			●	<input type="checkbox"/>	
2	D-B	SECTION_SB	06/12/2007		COMPENDIUM	IBR			●		
3	D-B	SC_S1_015_1	07/01/2007		COMPENDIUM	Full-Text			●		
4	70C	70C	06/26/2007		COMPENDIUM	Full-Text			●		
5	I	SECTION_I	08/11/2007		COMPENDIUM	Full-Text			●		
6	SA	SECTION_SA	06/12/2007		COMPENDIUM	Full-Text			●		
7	SA	SC_S2_2A003_1	01/01/2006		COMPENDIUM	Full-Text	DEFINITIONS (JAN 2006)		●		
8	SA	SC_S2_2A005_1	01/01/2004		COMPENDIUM	Full-Text	AMENDMENTS TO SOLICITATION (JAN 2004)		●		
9	SA	SC_S2_2A010_1	01/01/2004		COMPENDIUM	Full-Text	AWARD NOTIFICATION (NOV 2007)		●		
10	SA	SC_S2_2A015_1	01/01/2004		COMPENDIUM	Full-Text	BID/PROPOSAL AS OFFER TO CONTRACT (JAN 2004)		●		

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

Document Builder - SAP NetWeaver Portal - Windows Internet Explorer



The screenshot shows the 'Document Builder' interface with the 'Release' button highlighted in the menu. The 'Document Data Groups' list includes 'Source Selection' which is selected. The 'Source Selection' dialog box is open, showing options for document selection: IFB (Competitive Sealed Bidding), RFP (Competitive Sealed Proposal), BVB (Competitive Best Value Bidding), FPB (Competitive Fixed Price Bidding), and RAUC (Reverse Auction/Competitive On-line Bidding).

Document Builder

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

Groups

Previous Next Finish with Defaults

Document Data Groups

- Document Data
  - Source Selection
  - Office Conducting Procurement
  - Acquisition type
  - What do you reasonably anticipate will be the maximum dollar value of a purchase order?
  - Duration of Contract
  - Indefinite quantity of supplies or indefinite delivery of services
  - Number of Using Agencies
  - Services performed on State property
  - Harmful Product
  - How will award be made?
  - On-line Procurement
  - Blank Parts of the Uniform Solicitation Format
  - Attachments
  - Pre-Bid/Proposal Conference

Source Selection

What is your Document Selection?

- IFB (Competitive Sealed Bidding)
- RFP (Competitive Sealed Proposal) Refresh if selected
- BVB (Competitive Best Value Bidding) Refresh if selected
- FPB (Competitive Fixed Price Bidding)
- RAUC (Reverse Auction/Competitive On-line Bidding)

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

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- ④ Save the MS Word version of the Terms & Conditions to your desktop/network drive.
- ④ Make edits in MS Word to the document to add Scope of Work, Mandatory Minimums, additional clauses, etc.
- ④ Reattach the final version of the written solicitation to the Notes and Attachments tab.
- ④ Use the Visible Internally Only check box to flag any documents that you do not want published on the web.
- ④ Clicking the Publish button sends the solicitation to the Procurement Information Center, SCBO, and notifications to vendors with matching commodity codes.

# Document Finishing

RFX - SAP NetWeaver Portal - Mozilla Firefox

**Display RFX :**

Edit Close Copy Check Close Rfx Responses and Awards Create Follow-on RFX Convert to Auction Export Print Preview

RFX Number 5400006536 Smart Number Vehicles - Statewide Law Enforcement Type Invitation For Bid Status Published Created  
Time Zone EST Number of Suppliers 12 Number of Items 4 Version Number 2 Version Type Active Version

RFX Information Bidders Items **Notes and Attachments** Weights and Scores Approval Tracking

Notes

Add Clear

Assigned To	Category	Text Preview
Item01*MOT...	<a href="#">Tendering text</a>	LAW ENFORCEMENT MOTORCYCLE CRUISER (HARLEY DAVIDSON P...
Item02*MOT...	<a href="#">Tendering text</a>	LAW ENFORCEMENT MOTORCYCLE TOURING(BMW R1200RTP, HON...
Item03*SED ...	<a href="#">Tendering text</a>	SEDAN, POLICE, FULL SIZE, ALL WHEEL DRIVE, PURSUIT PACKA...
Item04*TRU ...	<a href="#">Tendering text</a>	TRUCK, POLICE, 4x2 UTILITY (SUV), INTERMEDIATE, 4-DOOR, ...

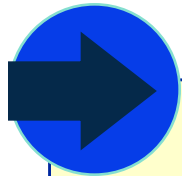
Attachments

Add Attachment Edit Description Versioning Delete Create Qualification Profile Filter Settings

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Legal Document	<a href="#">Word Document</a>	Word Document.WORD	2		<input checked="" type="checkbox"/>	<input type="checkbox"/>	doc	268	PIAPPLUSER	08/21/2013
Document Header	Legal Document	<a href="#">PDF Document</a>	PDF Document.PDF	2		<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdf	134	PIAPPLUSER	08/21/2013
Document Header	Legal Document	<a href="#">Responses Report</a>	Responses Report.html	2		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	38	PIAPPLUSER	08/21/2013
Document Header	Standard Attachment	<a href="#">Vehicle Questionnaire</a>	QUESTIONNAIRE-VEHICLE 2013.doc	1		<input type="checkbox"/>	<input type="checkbox"/>	doc	68	STA61092	08/23/2013
Document Header	Standard Attachment	<a href="#">IFB 5400006536</a>	Law Enforcement 6536.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	182	STA61092	08/28/2013

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

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

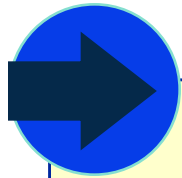


- ◆ **Related Links – Document Builder**
  - ◆ Use Doc Builder to build a Solicitation Document and Publish an RFx – Exercise 3.



# Solicitation Amendments

- ④ Amendments will be completed as a MS Word Document and attached to the RFx.
- ④ If an amendment modifies the bid schedule, make sure to make the same changes on the Item Data tab of the RFx.
- ④ If an amendment changes the End Date, make sure to change the End Date & Opening Date on the Header Data tab of the RFx.
- ④ Once the amendment is added and the changes made, click the publish button.



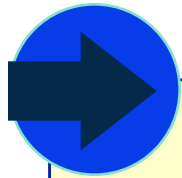
- ◆ **Process Bid Invitation**

- ◆ Publish an Amendment – Exercise 4.

# Solicitation E-mail Notifications

---

- ① Solicitation notifications are sent via e-mail only when the solicitation is initially published. E-mail notifications are not sent when publishing amendments.
- ① E-mails are sent to vendors registered with the same material group as the RFx and any vendors listed on the Bidders tab.
- ① Use Folder ZMM\_BUYER to send additional e-mail notifications, re-advertise in SCBO, and get reports of sent e-mails.



- ◆ **Process Bid Invitation**

- ◆ Solicitation E-mail Notifications – Demo Only.

# Lesson 4 Summary

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- 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

# Lesson 5 Learning Objectives

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

# Create Surrogate Bids

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- ① 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

**Display RFX :**

[Edit](#) [Close](#) [Copy](#) [Check](#) [Close Rfx](#) [Responses and Awards](#) [Create Follow-on RFX](#) [Convert to Auction](#) [Export](#) [Print Preview](#) [Questions and Answers \( 0 \)](#) [Related Links](#)

RFX Number: 540006375 Smart Number: Interpreters services TTC Type: Fixed Price Bid Status: Published Created On: 07/22/2013 10:33:25 Created By: Ms. Therese  
Number of Suppliers: 1 Number of Items: 3 Version Number: 4 Version Type: Active Version External Version Number: 3

**RFX Information** Bidders Items Notes and Attachments Weights and Scores Approval Tracking

RFX Parameters Questions Notes and Attachments Table Extension

**Identification**

Smart Number:   
 Smart Number is External  
RFX Name:   
RFX Type:   
Product Category:  Interpreter Services Hearing Impaired  
Reason Code:

**Event Parameters**

Currency:   
Target Value:  USD  
Detailed Price Information:   
Follow-On Document:   
Bidder Can Change RFX Responses:   
Allow Multiple RFX Responses for Each Company:   
Display Weighting to Bidders:

**Organization**

Purchasing Organization:   
Purchasing Group:

**Scenario Award/Contract**

SCBO Category: \*   
No Award: \*

**Dates**

Start Date:   
Submission Deadline: \*    
Opening Date:    
End of Bidding Period:   
Valid From / To:  -   
Award Posting Date: \*

**Partners and Delivery Information**

[Details](#) [Add](#) [Send E-Mail](#) [Call](#) [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 5400006378 Smart Number Interpreters services TTC Type Fixed Price Bid Sta  
Number of Suppliers 1 Number of Items 3 Version Number C3 Version Type C

RFx Information Bidders Items Notes and Attachments Weights and Scores Ap

RFx Parameters Questions Notes and Attachments Table Extension

**Identification**

Smart Number: Interpreters services TTC  
 Smart Number is External  
 New Serial Part for Smart Number

RFx Name: Interpreters services TTC  
RFx Type: Fixed Price Bid

Product Category: 96117 Interpreter Services Hearing Impaired  
Reason Code:

**Organization**

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

[Show Quick Criteria Maintenance](#)

View: [Standard View] | [Create RFX](#) | [Copy](#) | [Display](#) | [Edit](#) | [Delete](#) | [Publish](#) | [Responses and Awards](#) | [Print Preview](#) | [Refresh](#) | [Export](#)


RFx Number	RFx Name	Type	Status	RFx Category	Purchasing Organization	Submission Deadline	Responses
<a href="#">5400006494</a>	TERM CONTRACT FOR PICK-UP TRUCKS	ZIFB	Deleted		SCEIS Purchasing Organization		0
<a href="#">5400006478</a>	CAT07065 08/13/2013 14:05:21	ZIFB	Deleted				0
<a href="#">5400006444</a>	Vehicles - Cab and Chassis - Statewide	ZIFB	Published	07210	SCEIS Purchasing Organization	10/01/2013	0
<a href="#">5400006425</a>	OEM Gray Cast Iron Brake Drums	ZIFB	Saved	07543	SCEIS Purchasing Organization	10/02/2013	0
<a href="#">5400006409</a>	PROJECT DIRECTOR FOR CREATE	ZRFP	Saved	95877	SCEIS Purchasing Organization	08/05/2013	0
<a href="#">5400006407</a>	Vehicles - Cab and Chassis - Statewide	ZIFB	Deleted	07210	SCEIS Purchasing Organization	10/01/2013	0
<a href="#">5400006388</a>	OEM Gray Cast Iron Brake Drum	ZIFB	Deleted	07543	SCEIS Purchasing Organization	09/10/2013	0
<a href="#">5400006386</a>	Prosthetic Leg	ZIFB	Published		SCEIS Purchasing Organization	08/29/2013	1
<a href="#">5400006378</a>	Interpreters services TTC	ZFPB	Published	96117	SCEIS Purchasing Organization	09/16/2013	0
<a href="#">5400006366</a>	Interpreting Services	ZFPB	Published	96117	SCEIS Purchasing Organization	09/16/2013	2

Last Refresh 09/16/2013 15:41:49 EST [Refresh](#)

- 🔄 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

Response Comparison

Surrogate Bidding

Details | Response On Behalf | Return Response | Contract Mass 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

**Responses and Awards**

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

Remaining Time 0 Days 00:08:57 | Smart Number Interpreters services TTC | Type Fixed Price Bid | Status Published | Number of Suppliers

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

View By: Bidders Including Contact Persons

**Search by Contact Persons**

Business Partner Organization:  Country:   
Company Name 1: RGB\* Company Name 2:   
E-Mail:  Minority Status:   
DUNS:  Women Owned:   
Postal Code:  City:   
Maximum Number of Hits:  Surrogate Bid:

**Bidders**

Organization Name	Business Partner Organization	DUNS	Business Partner ID	Last Name	First Name
RGB TERPWORKS	7000000458		2756	BURGESS MACK	ROBIN
RGB SPECTRUM	7000099224		9455	DELAERE	TIM
RGB SYSTEMS INC	7000099552				
RGB SPECTRUM	7000133077				
RGB GROUP INC	7000195149		39066	ESPERT	SHIRLEY
RGBURNS INC	7000203061				

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

# Vendor Contact Information

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- ④ Vendors must have a contact person to enter surrogate bids.
- ④ Vendors who have gone through the SCEIS registration process after November 2007 will have a contact person.
- ④ Vendors who were registered prior to 2007 and were transferred from the Comptroller General's or MMO's legacy vendor file will NOT have a contact person.
- ④ 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 [www.procurement.sc.gov](http://www.procurement.sc.gov). The vendor should reference their current vendor number in Step 9 of the process in the Message to Administrator section.

# Response on Behalf



Responses and Awards

Print Preview Close Create Follow-on RF's Export Questions and Answers (0) Synopsis

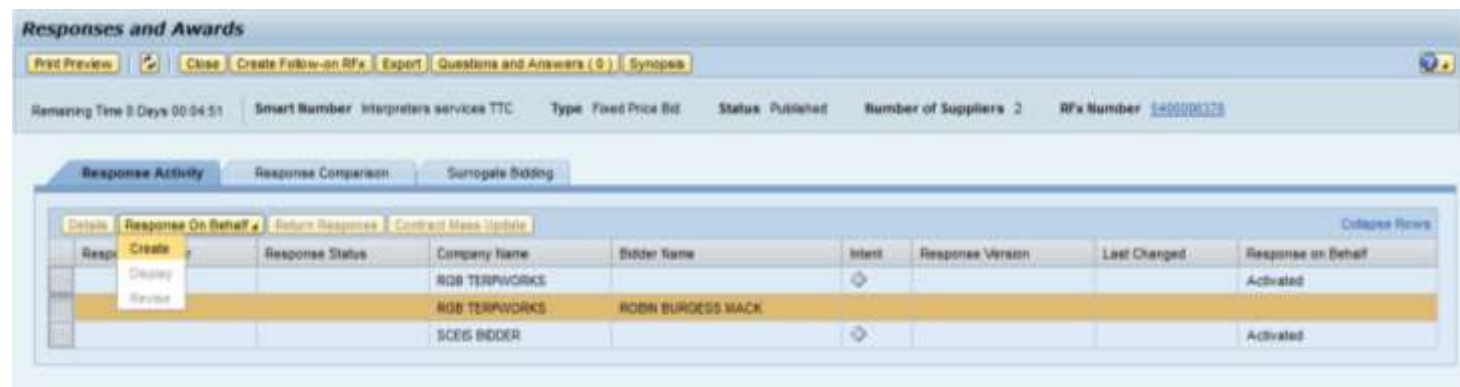
Remaining Time 0 Days 00:04:51 Smart Number Interpreters services TTC Type Fixed Price Bid Status Published Number of Suppliers 2 RF's Number 2400086328

Response Activity Response Comparison Surrogate Bidding

Details Response On Behalf Return Response Contract Mass Update Expand Rows

Response Number	Response Status	Company Name	Bidder Name	Intent	Response Version	Last Changed	Response on Behalf
		ROB TERPWORKS		◇			
		SCEIS BIDDER		◇			

Return to the Response Activity Screen and Click Expand Rows.



Responses and Awards

Print Preview Close Create Follow-on RF's Export Questions and Answers (0) Synopsis

Remaining Time 0 Days 00:04:51 Smart Number Interpreters services TTC Type Fixed Price Bid Status Published Number of Suppliers 2 RF's Number 2400086328

Response Activity Response Comparison Surrogate Bidding

Details Response On Behalf Return Response Contract Mass Update Collapse Rows

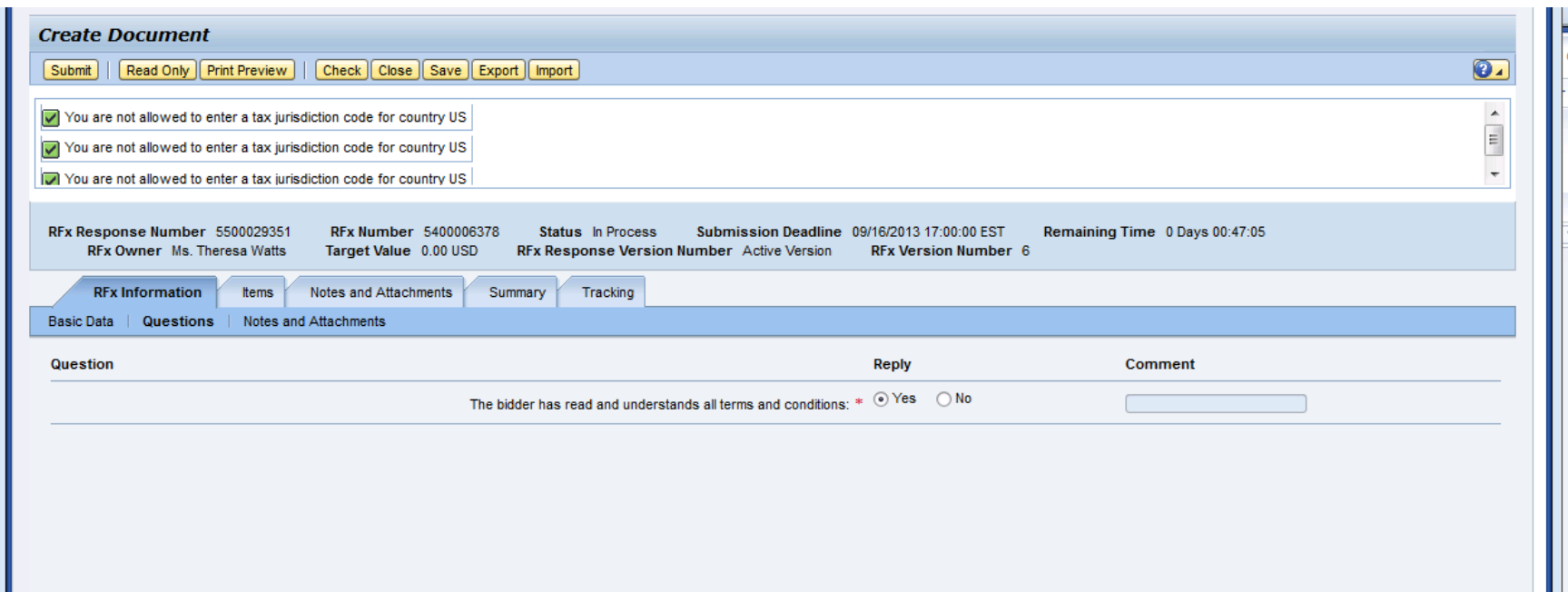
Response Number	Response Status	Company Name	Bidder Name	Intent	Response Version	Last Changed	Response on Behalf
		ROB TERPWORKS		◇			Activated
		ROB TERPWORKS	ROBN BURGESS MACK				
		SCEIS BIDDER		◇			Activated

Select the line with the Bidder Name.

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

RFX Response Number 5500029351   RFX Number 5400006378   Status In Process   Submission Deadline 09/16/2013 17:00:00 EST   Remaining Time 0 Days 00:47:05  
RFX Owner Ms. Theresa Watts   Target Value 0.00 USD   RFX Response Version Number Active Version   RFX Version Number 6

RFX Information | Items | Notes and Attachments | Summary | Tracking

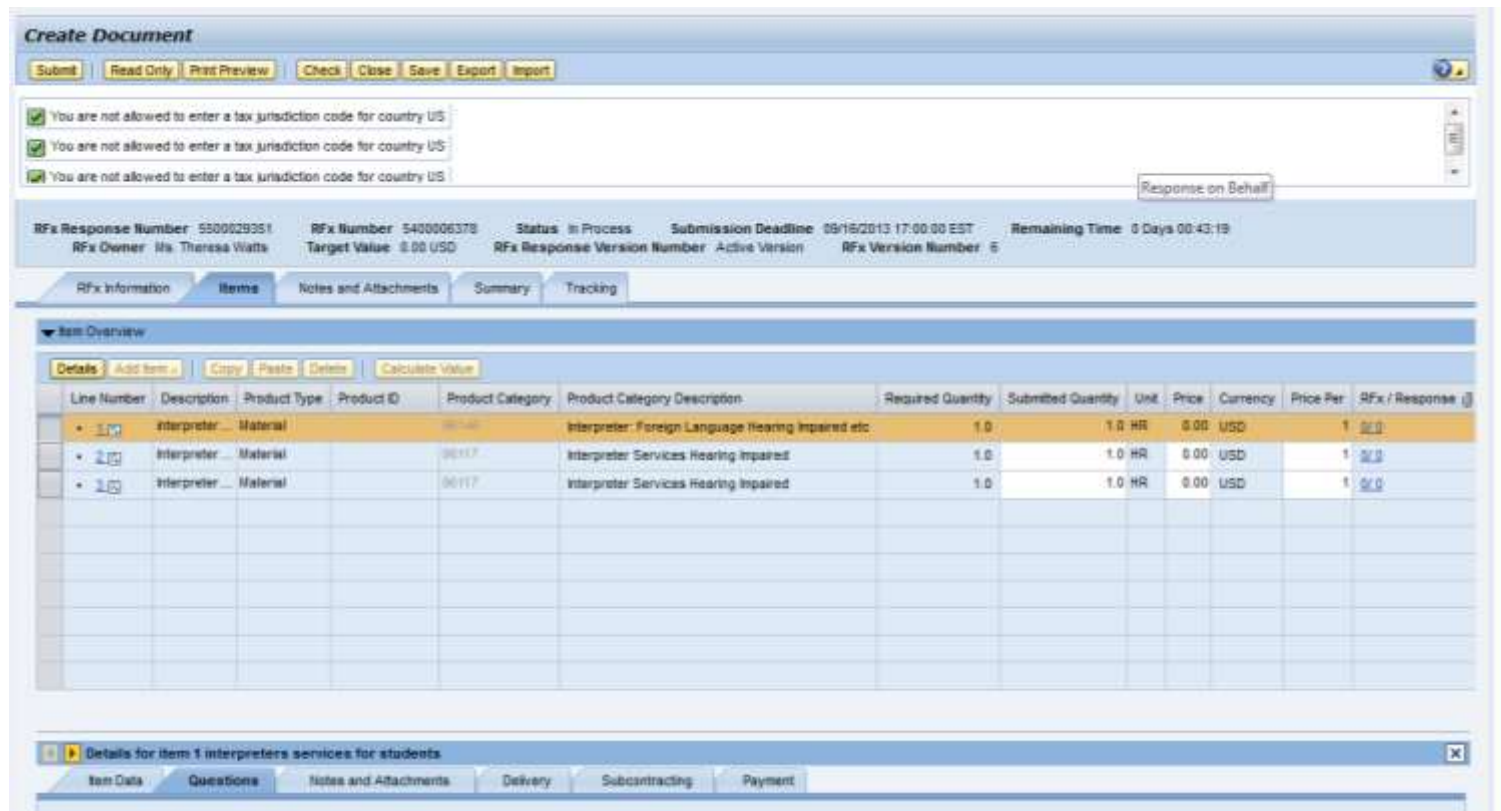
Basic Data | Questions | Notes and Attachments

Question	Reply	Comment
	The bidder has read and understands all terms and conditions: * <input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text"/>



# 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.



**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

Response on Behalf

RFX Response Number: 5500029351 RFX Number: 540006378 Status: In Process Submission Deadline: 09/16/2013 17:00:00 EST Remaining Time: 0 Days 00:43:19  
RFX Owner: Ms. Theresa Watts Target Value: 0.00 USD RFX Response Version Number: Active Version RFX Version Number: 5

RFX Information **Items** Notes and Attachments Summary Tracking

Item Overview

Details Add Item Copy Paste Delete Calculate Value

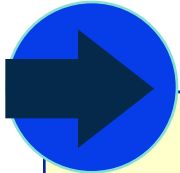
Line Number	Description	Product Type	Product ID	Product Category	Product Category Description	Required Quantity	Submitted Quantity	Unit	Price	Currency	Price Per	RFX / Response
1	Interpreter	Material	90117	Interpreter	Interpreter Foreign Language Hearing Impaired etc	1.0	1.0	HR	0.00	USD	1	
2	Interpreter	Material	90117	Interpreter	Interpreter Services Hearing Impaired	1.0	1.0	HR	0.00	USD	1	
3	Interpreter	Material	90117	Interpreter	Interpreter Services Hearing Impaired	1.0	1.0	HR	0.00	USD	1	

Details for item 1 interpreters services for students

Item Data Questions **Notes and Attachments** Delivery Subcontracting Payment

# Demonstration and Exercise

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## ◆ **Process Bid Invitation**

- ◆ Create Surrogate Bid – Exercise 5.

# Lesson 5 Summary

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- 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

# Lesson 6 Learning Objectives

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- ① 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

Options ▾

**Display RFx :**

Edit Close Copy Check Close Rfx Responses and Awards Create Follow-on RFx Convert to Auction Export Print Preview Questions and Answers ( 0 )

Related Links ▾

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 [www.procurement.sc.gov](http://www.procurement.sc.gov).

# Response Comparison

Responses and Awards - SAP NetWeaver Portal - Windows Internet Explorer

**Responses and Awards**

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

Remaining Time 0 Days 00:00:00 | Smart Number Web Site Design Project | Type Request for Proposal | Status Published | Number of Suppliers 4 | RFx Number [5400006687](#)

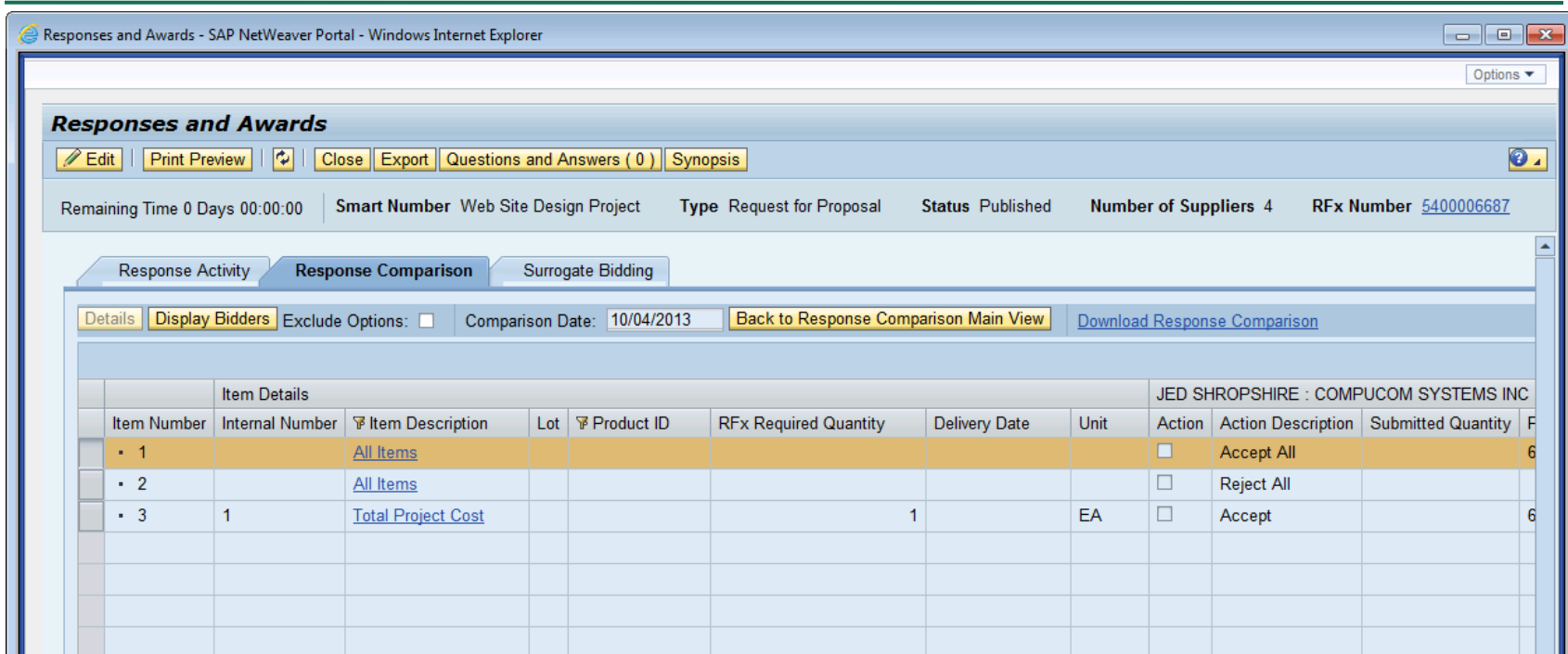
Response Activity | **Response Comparison** | Surrogate Bidding

Compare Selected Responses | Compare All Responses | Simple Comparison

Response Number	Response Version	Company Name	Bidder Name
<a href="#">5500029386</a>		COMPUCOM SYSTEMS INC	JED SHROPSHIRE
<a href="#">5500029384</a>		WEB ENK	MARK WAYNE-HART
<a href="#">5500029385</a>		WEBB DESIGNS INC	DAVID KOPESER

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

# Response Comparison



Responses and Awards - SAP NetWeaver Portal - Windows Internet Explorer

**Responses and Awards**

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

Remaining Time 0 Days 00:00:00 | Smart Number Web Site Design Project | Type Request for Proposal | Status Published | Number of Suppliers 4 | RFX Number [5400006687](#)

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

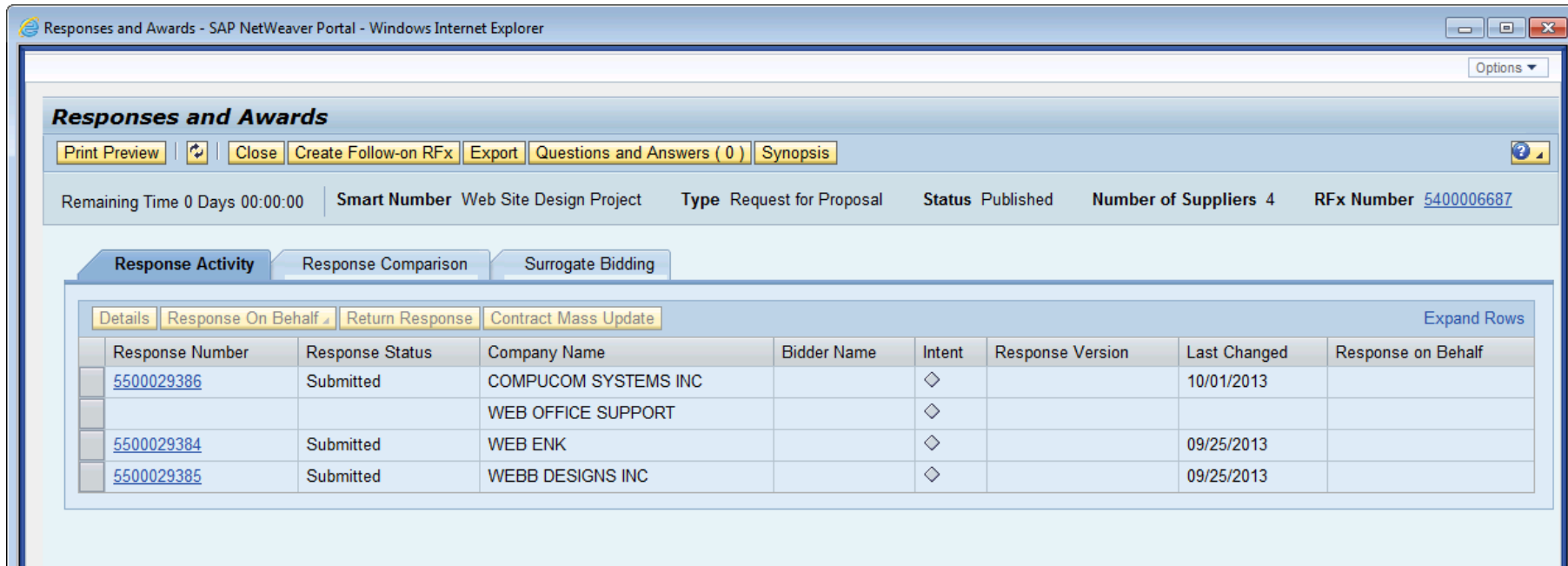
Details | Display Bidders | Exclude Options:  | Comparison Date: 10/04/2013 | [Back to Response Comparison Main View](#) | [Download Response Comparison](#)

Item Number	Internal Number	Item Description	Lot	Product ID	RFX Required Quantity	Delivery Date	Unit	Action	Action Description	Submitted Quantity
• 1		<a href="#">All Items</a>						<input type="checkbox"/>	Accept All	6
• 2		<a href="#">All Items</a>						<input type="checkbox"/>	Reject All	
• 3	1	<a href="#">Total Project Cost</a>			1		EA	<input type="checkbox"/>	Accept	6

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



# Response Activity



Responses and Awards - SAP NetWeaver Portal - Windows Internet Explorer

**Responses and Awards**

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

Remaining Time 0 Days 00:00:00 | Smart Number Web Site Design Project | Type Request for Proposal | Status Published | Number of Suppliers 4 | RFx Number [5400006687](#)

Response Activity | Response Comparison | Surrogate Bidding

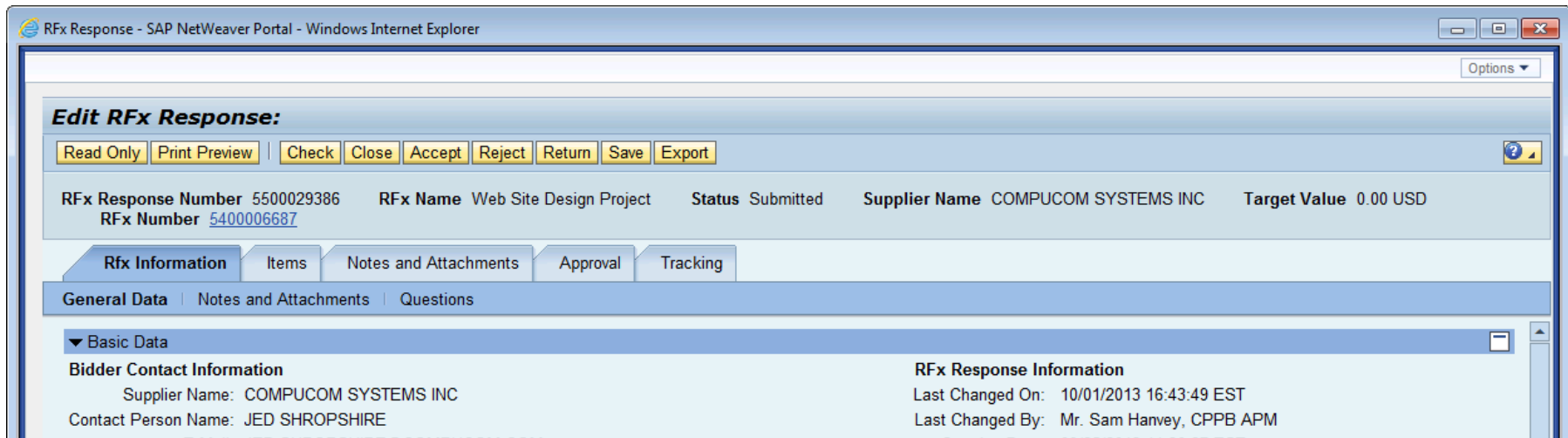
Details | Response On Behalf | Return Response | Contract Mass Update | Expand Rows

Response Number	Response Status	Company Name	Bidder Name	Intent	Response Version	Last Changed	Response on Behalf
<a href="#">5500029386</a>	Submitted	COMPUCOM SYSTEMS INC		◇		10/01/2013	
		WEB OFFICE SUPPORT		◇			
<a href="#">5500029384</a>	Submitted	WEB ENK		◇		09/25/2013	
<a href="#">5500029385</a>	Submitted	WEBB DESIGNS INC		◇		09/25/2013	

- 🌀 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



The screenshot shows a web browser window titled "RFX Response - SAP NetWeaver Portal - Windows Internet Explorer". The page content includes:

- Edit RFX Response:** A header section with a toolbar containing buttons: Read Only, Print Preview, Check, Close, Accept, Reject, Return, Save, and Export.
- Summary Fields:** RFX Response Number 5500029386, RFX Name Web Site Design Project, Status Submitted, Supplier Name COMPUCOM SYSTEMS INC, Target Value 0.00 USD. A link for RFX Number 5400006687 is also present.
- Navigation Tabs:** Rfx Information (selected), Items, Notes and Attachments, Approval, and Tracking.
- General Data:** A sub-section with tabs for General Data, Notes and Attachments, and Questions.
- Basic Data:** A collapsed section containing:
  - Bidder Contact Information:** Supplier Name: COMPUCOM SYSTEMS INC, Contact Person Name: JED SHROPSHIRE.
  - RFX Response Information:** Last Changed On: 10/01/2013 16:43:49 EST, Last Changed By: Mr. Sam Harvey, CPPB APM.

 ( ... Hard copy online bid)

– Click Print Preview.

# Accepting Bids

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- ④ The Buyer has the ability to accept the vendor's bid entirely or only accept certain line items from the vendor's response.
- ④ 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.

## Responses and Awards

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

Remaining Time 0 Days 00:22:35 | Smart Number Interpreters services TTC | Type Fixed Price Bid | Status Published | Number of Suppliers 2 | RFX Number [5400006378](#)

### Response Activity

### Response Comparison

### Surrogate Bidding

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

Collapse Rows

Response Number	Response Status	Company Name	Bidder Name	Intent	Response Version	Last Changed	Response on Behalf
<a href="#">5500029351</a>	Submitted	RGB TERPWORKS		◇		09/16/2013	Activated
<a href="#">5500029351</a>	Submitted	RGB TERPWORKS	ROBIN BURGESS MACK			09/16/2013	
		SCEIS BIDDER		◇			Activated

# Creating Contract/PO

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- 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.

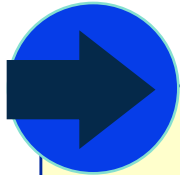
NOTE: Currently, it is not possible to post an award statement to the internet from a Purchase Order.

# Creating Contracts

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- ④ 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.

# Demonstration and Exercise



- ◆ **Accept and Create Purchase Order and Contract**
  - ◆ Evaluate Bids and Create Contract – Exercise 6.

# Lesson 6 Summary

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- ① You should now be able to:
  - Evaluate bids that have been submitted.
  - Accept bids and create contracts in SRM.





# LESSON 7: MAINTAIN CONTRACTS AND AWARD STATEMENTS

# Lesson 7 Learning Objectives

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- ① 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

The screenshot displays the SAP Strategic Purchasing Contract Management interface. The main content area shows a table of contracts with columns for Central Contract Number, Central Contract Name, Status, Purchasing Organization, Supplier, Valid From, Valid To, and Priority. The table contains five rows of contract data.

Central Contract Number	Central Contract Name	Status	Purchasing Organization	Supplier	Valid From	Valid To	Priority
440000124	Recovery AvulContract (RAC) (cable)	Released	SOEIS Purchasing Organization	HEALTH MANAGEMENT SYSTEMS INC	30/06/2013	30/06/2016	<input type="checkbox"/>
440000127	ARCOC (cable) (cable) Maintenance	Saved	SOEIS Purchasing Organization	REMOTIVE SYSTEMS INTEGRATION LLC	03/19/2013	02/10/2016	<input type="checkbox"/>
440000130	ALLES PLASTICS CO INC	Awaiting Approval	SOEIS Purchasing Organization	ALLES PLASTICS CO INC	01/04/2012	12/04/2012	<input type="checkbox"/>
440000132	BRILLIANT TOOLS (SOEIS) AIRCRAFT TRAINING	Awaiting Approval	SOEIS Purchasing Organization	US TOOL SPRING INC.	20/10/2011	30/06/2016	<input type="checkbox"/>
440000135	Automated ELAS System	Awaiting Approval	SOEIS Purchasing Organization	DIAGNOSTIX OF CALIFORNIA	03/07/2008	06/30/2016	<input type="checkbox"/>

- 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**

Class | Remove | Edit | Copy | Check | Renew | Print Preview | Export | Related Links

Contract Number: 4400006324    Smart Number: Recovery AuditContract (RAC/Solicitation)    Contract Type: Agency Value Cont.    Status: Released    Supplier: 7000070098 HEALTH MANAGEMENT SYSTEMS INC    Contract Owner: 10587 Chris Manos, CPFR

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



**General Header Data**

Contract Number: 4400006324    Contract Name: Recovery AuditContract (RAC/Solicitation)  
Supplier: 7000070098 HEALTH MANAGEMENT SYSTEMS INC    Contract Owner: 10587 Chris Manos, CPFR  
Valid From / To: 02/05/2013 - 02/05/2018    Target Value/ Currency: 1,000,000.00 USD  
Purchasing Organization: SCEIS Purchasing Organization    Release Value: 0.00 USD  
Purchasing Group: WMO - C. Manos Show Members    Basic Contract:

**Items**

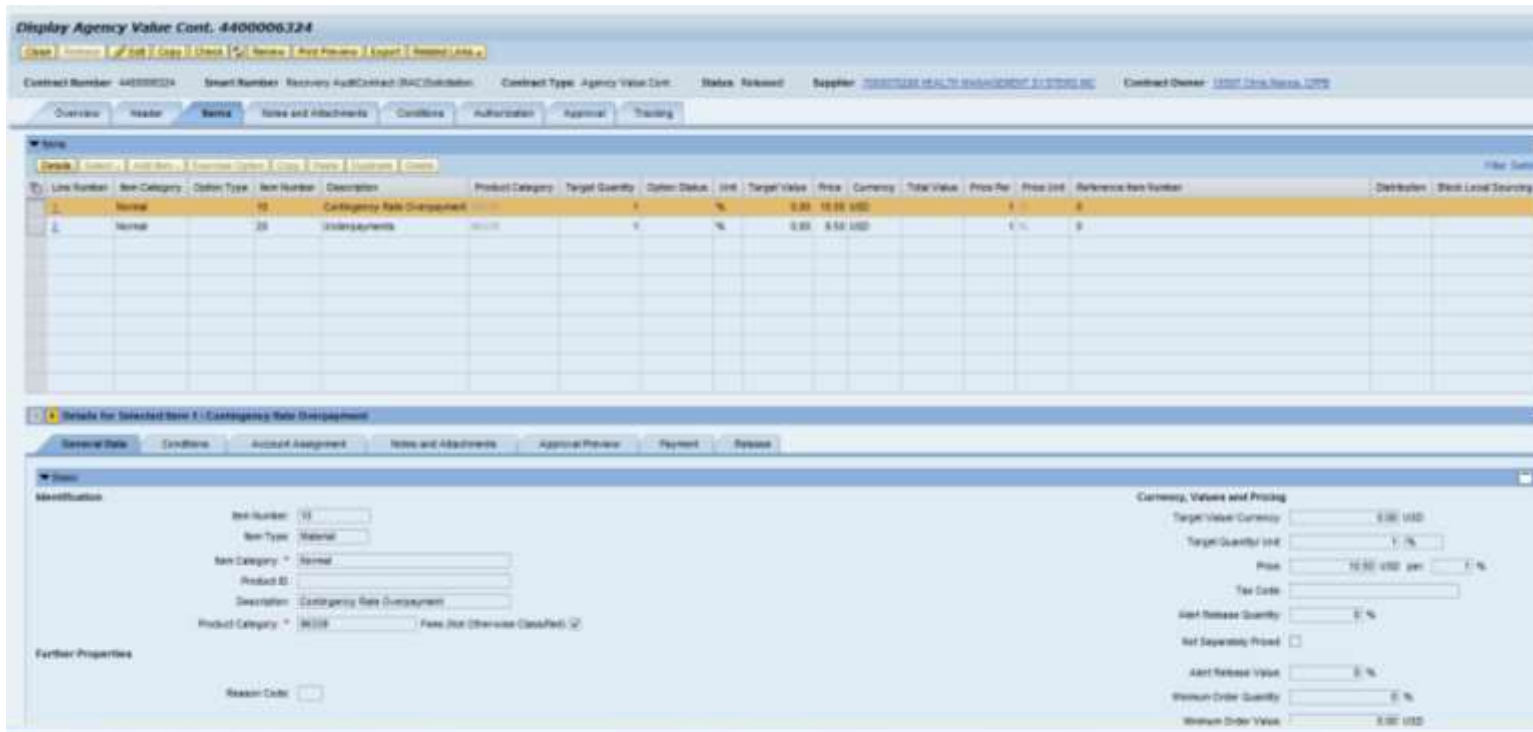
Details | Select | Add Item | Exercise Option | Copy | Paste | Duplicate | Delete

Line Number	Item Category	Item Number	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Total Value	Price Per	Price Unit	Reference Item Number
1	Normal	10	Contingency Rate Overpayment		1		%	0.00	10.00	USD		1 %	0	
2	Normal	20	Underpayments		1		%	0.00	9.50	USD		1 %	0	

-  The contract Overview shows:
  - Valid From/To
  - Target Value
  - Overview of Line Items
-  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.



**Display Agency Value Cont. 4400006324**

Contract Number: 44000024    Smart Number: Recovery Audit Contract (RAC) Distribution    Contract Type: Agency Value Cont.    Status: Released    Supplier: [SOUTHCAROLINA HEALTH ENVIRONMENT & SERVICES INC](#)    Contract Owner: [20077 Chris Brown, 1075](#)

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

**Items**

Line Number	Item Category	Order Type	Item Number	Description	Product Category	Target Quantity	Order Status	UoM	Target Value	Price	Currency	Total Value	Price Per	Price UoM	Reference Item Number	Delivery	Stock Lead Sourcing
1	Normal	10		Contingency Rate Disbursement		1		%	0.00	10.00 USD			1	\$			
2	Normal	20		Underpayments		1		%	0.00	0.00 USD			1	%	\$		

**Details for Selected Item 1: Contingency Rate Disbursement**

General Data    Conditions    Account Assignment    Notes and Attachments    Approval Process    Payment    Release

**Item**

**Identification**

Item Number:   
Item Type:   
Item Category:   
Product ID:   
Description:   
Product Category:   Fees (not otherwise classified)

**Further Properties**

Reason Code:

**Currency, Values and Pricing**

Target Value Currency:   
Target Quantity UoM:   
Price:  per   
Tax Code:   
Net Release Quantity:   
Net Expenditure Priced:   
Net Release UoM:   
Minimum Order Quantity:   
Minimum Order Value:

# Creating Award Statements/Intents

**Display Agency Value Cont. 4400006324**

Close Release Edit Copy Check Print Preview Export Related Links

- Valid from date 02/05/2013 must be equal or later than FM posting date 0
- You are not allowed to enter a tax jurisdiction code for country US
- Contract 4400006324 saved

Contract Number 4400006324 (Change Version) Smart Number Recovery AuditContract (RAC)Solic

Overview Header **Items** Notes and Attachments Conditions Authorization

Items

Details Select Add Item Exercise Option Copy Paste Duplicate Delete

Line Number	Item Category	Option Type	Item Number	Description	Product Cat
1	Normal		10	Contingency Rate Overpayment	96339
2	Normal		20	Underpayments	96339

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

# Posting Award Statements/Intents



Change Agency Value Cont. 440006324

Read Only Close Release Save Check Lock Close Contract Print Preview Export Import Park Related Links

Contract Number 440006324 (Change Version) Smart Number Recovery AuditContract (RAC/Solicitation) Contract Type Agency Value Cont Status In Process Supplier 2000070208 HEALTH MANAGEMENT SYSTEMS INC Contract Owner 10587 Chris Maros, CPFS

Overview Header Items Notes and Attachments Conditions Authorization Approval Tracking

▼ Notes

Add Clear Filter Settings

Assigned To	Category	Text Preview
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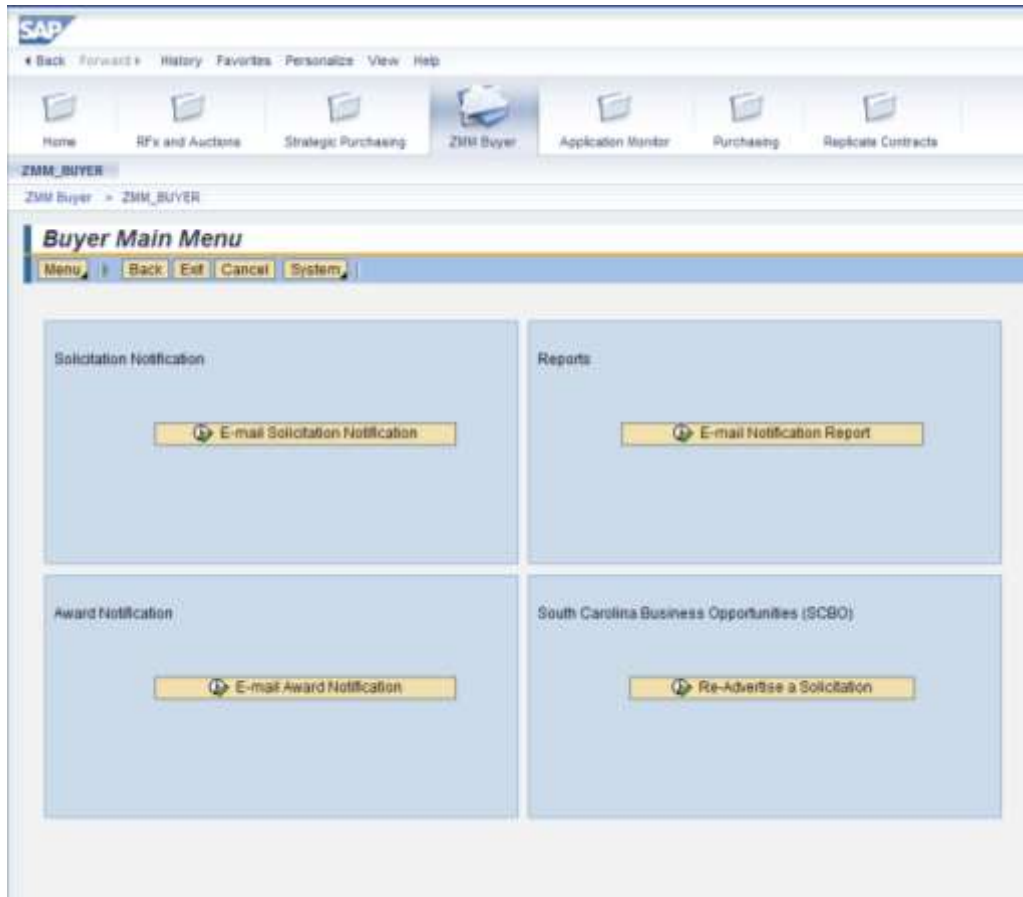
▼ Attachments

Add Attachment Edit Description Versioning Delete Create Qualification Profile Filter Settings

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Standard Attachment	<a href="#">Document Builder Doc 000000000011536</a>	FILE0001	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdf	0	JWAITES	09/17/2013
Document Header	Standard Attachment	<a href="#">Intent to Award</a>	FILE0001	1		<input type="checkbox"/>	<input type="checkbox"/>	doc	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



- 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

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- ① 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

# Lesson 8 Learning Objectives

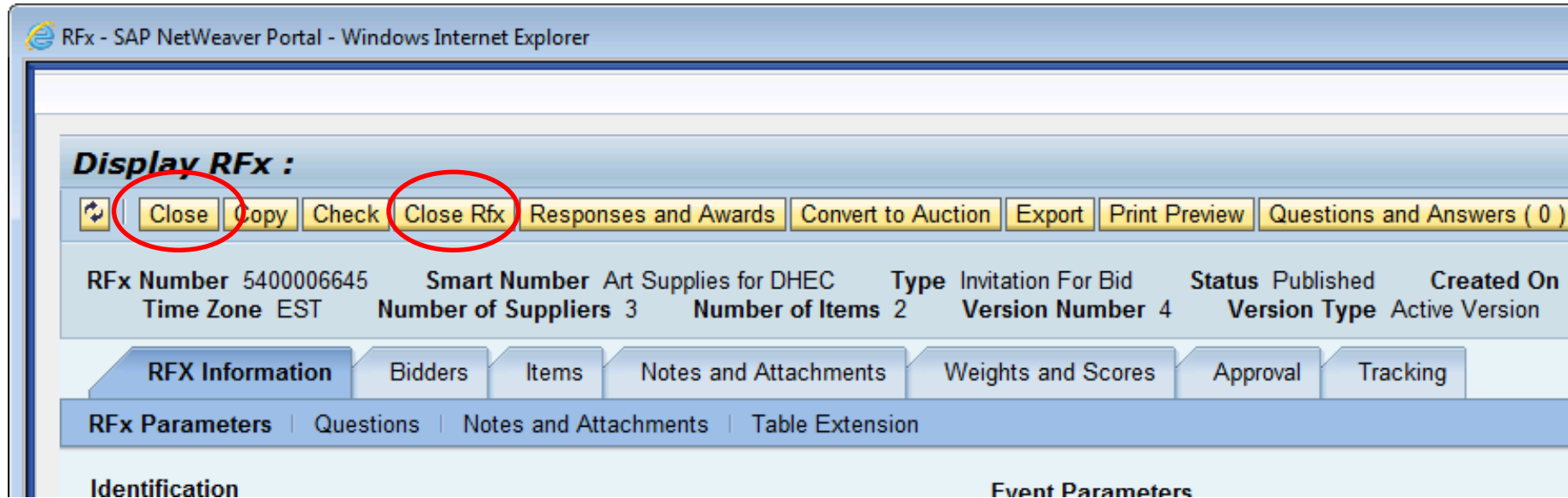
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- Upon completion of this lesson, you should be able to:
  - Understand when to mark a RFX “Transaction Completed.”

## 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



The screenshot shows a web browser window titled "RFx - SAP NetWeaver Portal - Windows Internet Explorer". The main content area is titled "Display RFx :". Below the title is a horizontal toolbar with several buttons: "Close", "Copy", "Check", "Close Rfx", "Responses and Awards", "Convert to Auction", "Export", "Print Preview", and "Questions and Answers ( 0 )". The "Close" and "Close Rfx" buttons are circled in red. Below the toolbar is a table of RFx details:

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

Below the table are several tabs: "RFX Information", "Bidders", "Items", "Notes and Attachments", "Weights and Scores", "Approval", and "Tracking". At the bottom, there are sections for "RFx Parameters", "Questions", "Notes and Attachments", and "Table Extension".

- 🌀 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.

# Lesson 8 Summary

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- You should now be able to:
  - Understand when to mark a RFX “Transaction Completed.”

# Course Summary

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- ① You should now 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 Summary cont.

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- ① You should now 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 Summary cont.

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- ① You should now 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.

# Any Questions?

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# Next Steps

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- ➊ 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**