


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

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

STATE INFORMATION  
TECHNOLOGY  
**BITCB**  
SC BUDGET AND CONTROL BOARD

## 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

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## 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

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## Course Learning Objectives



- 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.

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## Course Learning Objectives



- ④ 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 .

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## Course Learning Objectives cont.



- ④ 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.

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**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

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**LESSON 1: DIFFERENCES BETWEEN  
COMPLEX AND SMALL PURCHASES  
RFx**



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## Lesson 1 Learning Objectives



- 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.

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## RFxs - Types



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

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## 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.

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## 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.

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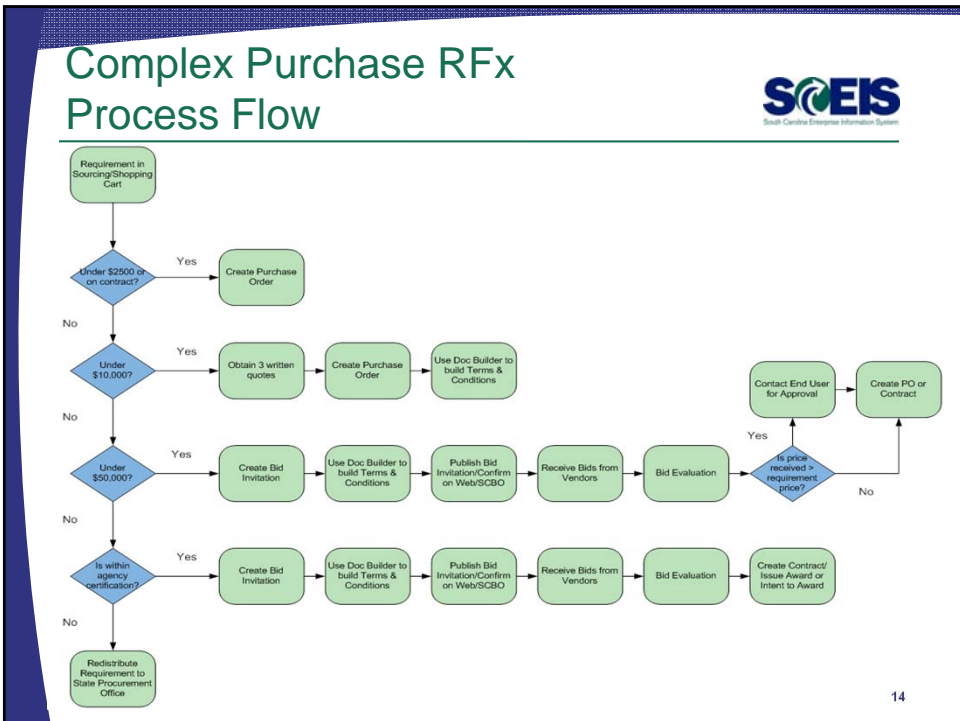
## RFxs - Types




🕒 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

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## Lesson 1 Summary




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

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## LESSON 2: WORKLOAD REDISTRIBUTION



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## 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.

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## Redistribute Workload – SRM 5.0



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- 🕒 Screenshot from SRM 5.0

**Redistribution of Workload**

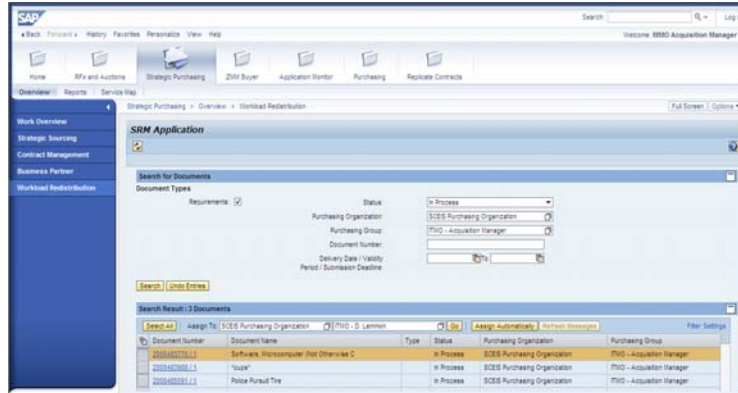
**Find Documents**

Requirements <input checked="" type="checkbox"/>	Purchase Orders <input type="checkbox"/>	Bid Invitations <input type="checkbox"/>	Contracts <input type="checkbox"/>
Purch. Organization SCEIS Purchasing Organization	Purchasing Group Vocational Rehabilitation	Status All	
Product <input type="text"/>	Product Category <input type="text"/>	Vendor <input type="text"/>	
Delivery Date/ValidityPeriod/Submission Deadline <input type="text"/> - <input type="text"/>		Document Number <input type="text"/>	

[Start](#)   [Simple Search](#)   [Reporting Workload](#)

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## Workload Redistribution



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.

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## 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

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## 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.

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## LESSON 3: SOURCING



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## Lesson 3 Learning Objectives



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

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## Carry Out Sourcing



🕒 Screenshot from SRM 5.0

**Sourcing**

Worklist Find

Display: All Categories


**Overview of Requirements**

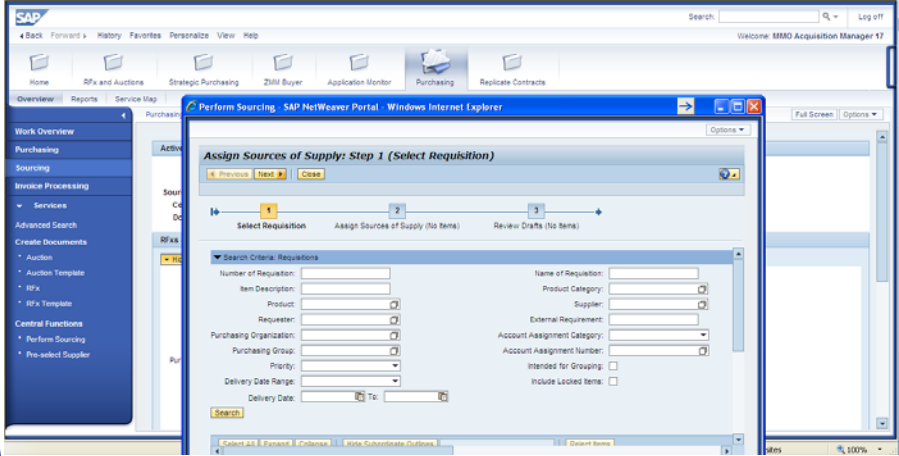
<input type="checkbox"/>	Description	Category	Quantity	Requester	Name of Vendor	Requirement	Contract	Bid Invitation Name	Inv
<input type="checkbox"/>	Single Engine Airplane	Airplanes	1 each	Tracy Hill		<a href="#">2000015698/1</a>			
<input type="checkbox"/>	30 KW Standby Generator 104 Amps	Generators 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

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## Perform Sourcing

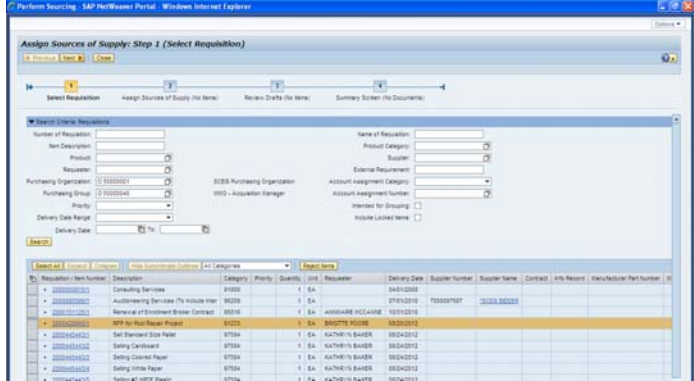




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## Perform Sourcing – Step 1 Select Requisition

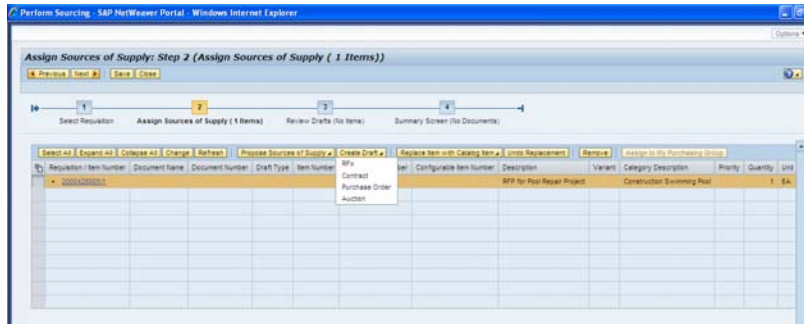




- Click blue box to select line item.
- Hold Control key to select multiple line items.
- Click Next to move to Step 2.

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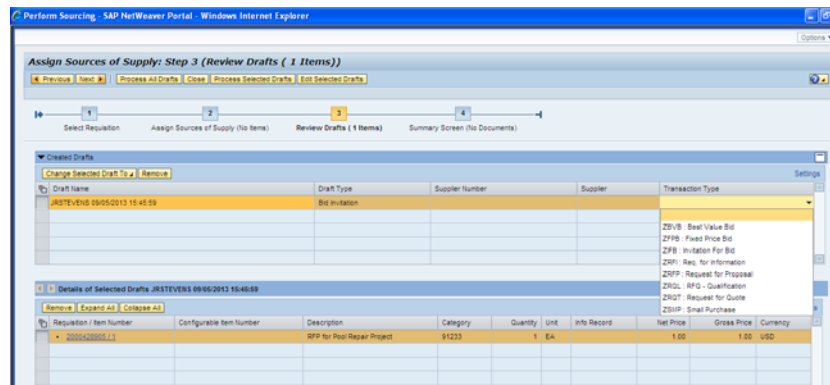
## Perform Sourcing – Step 2 Assign Sources of Supply



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

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## Perform Sourcing – Step 3 Review Drafts



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

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## Demonstration and Exercise



- ◆ **Purchasing**
  - ◆ Sourcing – Exercise 1

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## Lesson 3 Summary




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

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### 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.

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## Strategic Purchasing



View	Standard View	Create RFX	Copy	Display	Edit	Delete	Refresh	Responses and Awards	Print Preview	Refresh	Export
RFX Number	RFX Name	Type	Status	RFX Category	Purchasing Organization	Submission Deadline	Responses				
5400005631	KM14378 09/25/2013 15.51.18	ZFB	Saved		SCEIS Purchasing Organization		0				
5400005630	KM14378 09/25/2013 15.47.42	ZFB	Saved		SCEIS Purchasing Organization		0				
5400005628	Road Spikes	ZFB	Published	6885	SCEIS Purchasing Organization	09/26/2013	0				
5400005627	Web Site Design Project	ZFB	Published	9196	SCEIS Purchasing Organization	09/26/2013	3				
5400005643	SHANVEY 09/25/2013 18.33	ZFB	Saved		SCEIS Purchasing Organization		0				
5400005642	KM14378 09/25/2013 18.09	ZFB	Published		SCEIS Purchasing Organization	09/26/2013	1				
5400005641	Final Price Bid Test 1	ZFB	Published		SCEIS Purchasing Organization	09/26/2013	1				
5400005640	IT&A DNEC	ZFB	Published		SCEIS Purchasing Organization	09/19/2013	2				
5400005673	Contract Replication Inventory	ZFB	Published		SCEIS Purchasing Organization	09/26/2013	1				
5400005672	Copy of 5400005670	ZFB	Saved		SCEIS Purchasing Organization		0				

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

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## 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: ZFB Invitation For Bid

Product Category: [Dropdown]

Type of Publication: Public Bid Invitation [Dropdown]

Responsible Purchasing Organization: SCEIS Purchasing Organization [Dropdown]

Responsible Purchasing Group: 740 - DNR [Dropdown]

Company Code: State of South Carolina


Start Date: [Date/Time Picker] 00:00:00

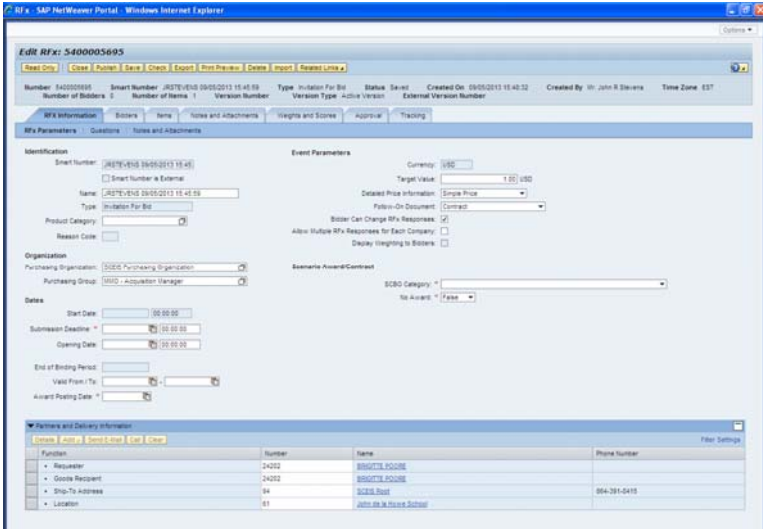
End Date: 05/03/2010 [Date/Time Picker] 14:30:00

Opening Date: 05/03/2010 [Date/Time Picker] 14:30:00

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## Edit RFx – SRM 7.2






Function	Number	Name	Phone Number
Requester	24202	BRIGITTE POLINE	
Goods Receipt	24202	BRIGITTE POLINE	
Ship-To Address	14	SCEIS Site	804-381-0418
Location	81	JAMES M. STONE SCHOOL	

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## Edit RFx – Helpful Hints




- 🕒 Submission Deadline and Opening Date should be the same in order to seal bids from the vendor.
- 🕒 Do 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.

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## Demonstration and Exercise




 **Strategic Purchasing**

- ◆ Edit RFx – Exercise 2

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## Document Builder



- 🕒 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.

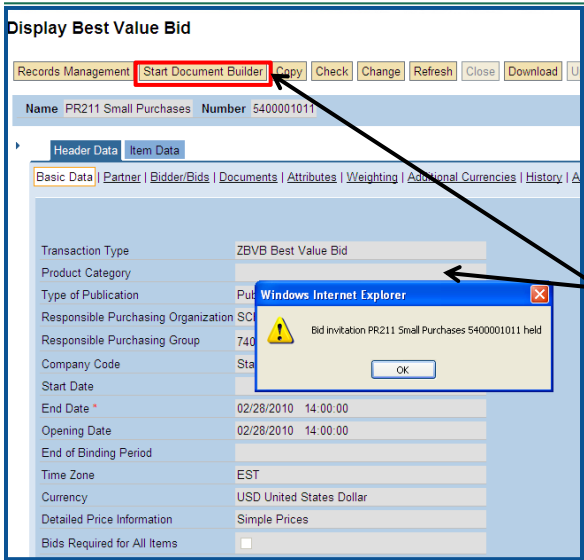
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## Document Builder Functionality cont.

- ④ Updates or edits cannot be made in Document Builder once the document has been released.
- ④ Additional text specific to the solicitation (ex. Scope of Work) is added to the document using MS Word outside of SCEIS.
- ④ There is currently not a dialog for small purchases terms and conditions.

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## SRM 5.0

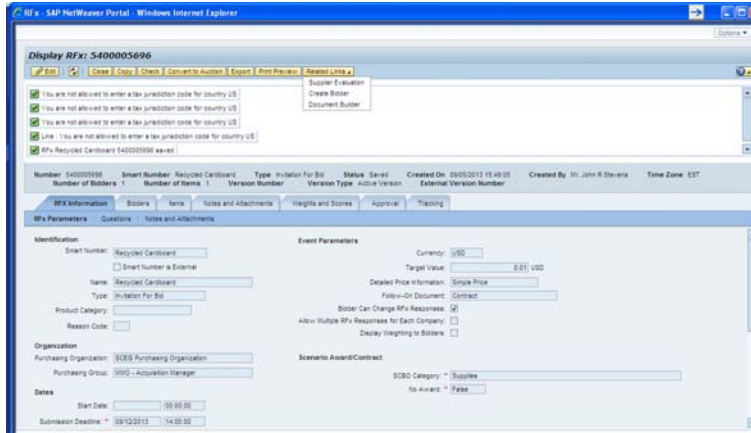


Click the OK button in the Windows Internet Explorer box. You will notice that the Start Document Builder button is now enabled. Click on the Start Document Builder to begin the process.

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

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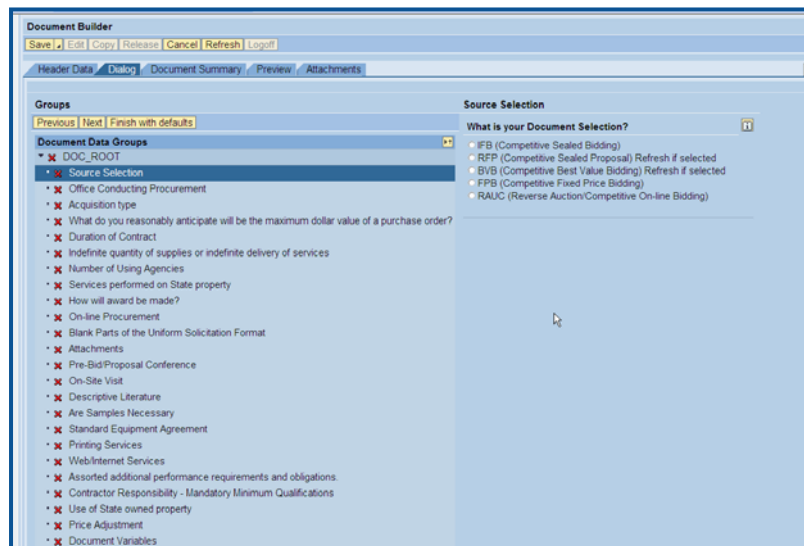
## SRM 7.2



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

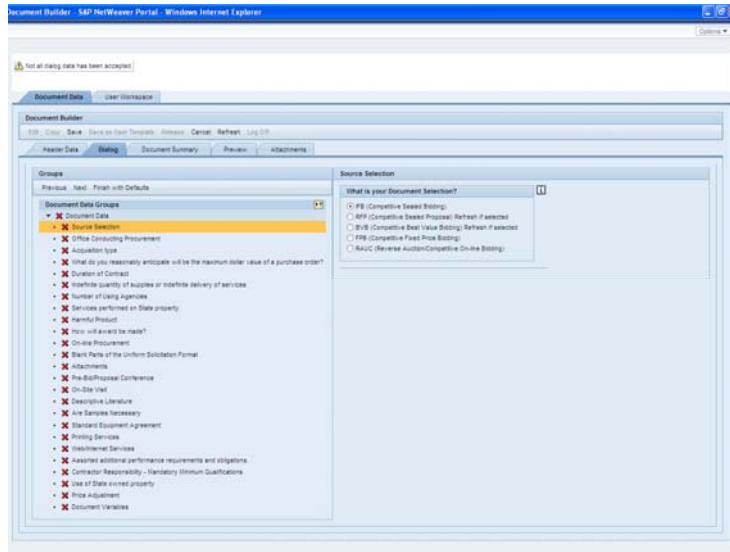
41

## Doc Builder 5.0 - Dialog



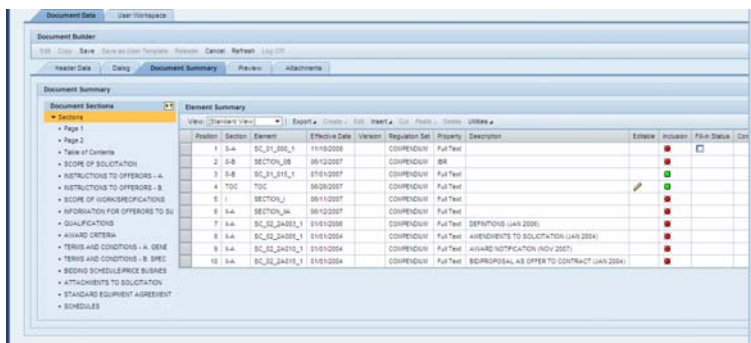
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## Doc Builder 7.2 - Dialog



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## Document Summary

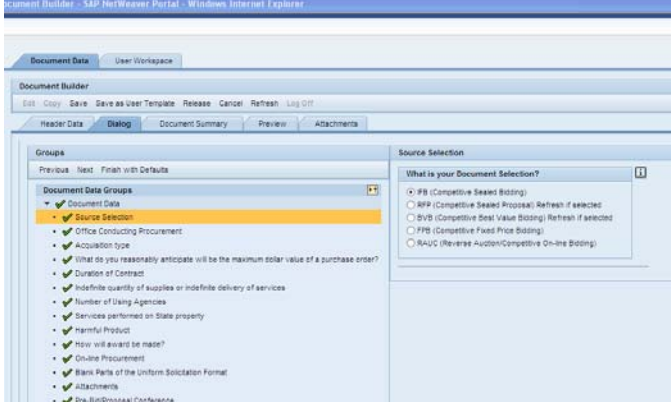


On the Document Summary tab you can compare your questions/answers to the related Compendium sections. You can also review the clause that will be inserted into your document. This screen is used to insert additional clauses as well as reviewing clauses added by the dialog.

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## Release






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.

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## 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.
- 🔄 Use the Visible Internally Only check box to flag any documents that you do not want published on the web.
- 🔄 Clicking the Publish button sends the solicitation to the Procurement Information Center, SCBO, and notifications to vendors with matching commodity codes.

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## Document Finishing



RFx - SAP NetWeaver Portal - Mozilla Firefox

**Display RFx :**

RFx Number: 5402000536    Smart Number: Vehicles - Statewide Law Enforcement    Type: Invitation For Bid    Status: Published    Cre  
 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**

Assigned To	Category	Text Preview
Item01*WOT	Tender/cls.txt	LAW ENFORCEMENT MOTORCYCLE CRUISER (HARLEY DAVIDSON)
Item02*WOT	Tender/cls.txt	LAW ENFORCEMENT MOTORCYCLE TOURING/BMW R1200RT9 HO
Item03*SED	Tender/cls.txt	SEDAN, POLICE, FULL SIZE, ALL WHEEL DRIVE, PURSUIT PACKA...
Item04*TRU	Tender/cls.txt	TRUCK, POLICE, 4X2 UTILITY (SUV), INTERMEDIATE, 4 DOOR, ...

**Attachments**


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	266	PAAPRUSER	09/21/2013
Document Header	Legal Document	<a href="#">PDF Document</a>	PDF Document PDF	2		<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdf	154	PAAPRUSER	09/21/2013
Document Header	Legal Document	<a href="#">Responses Report</a>	Responses Report.html	2		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	38	PAAPRUSER	09/21/2013
Document Header	Standard Attachment	<a href="#">Vehicle Questionnaire</a>	QUESTIONNAIRE-VEHICLE 2013.doc	1		<input type="checkbox"/>	<input type="checkbox"/>	doc	68	STA61092	09/23/2013
Document Header	Standard Attachment	<a href="#">RF 5402000536</a>	Law Enforcement 6536.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	182	STA61092	09/28/2013


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.

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## Demonstration and Exercise





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

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## 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.

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## Demonstration and Exercise



- ◆ **Process Bid Invitation**
  - ◆ Publish an Amendment – Exercise 4.

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## Solicitation E-mail Notifications



- ④ Solicitation notifications are sent via e-mail only when the solicitation is initially published. E-mail notifications are not sent when publishing amendments.
- ④ E-mails are sent to vendors registered with the same material group as the RFX and any vendors listed on the Bidders tab.
- ④ Use Folder ZMM\_BUYER to send additional e-mail notifications, re-advertise in SCBO, and get reports of sent e-mails.

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## Demonstration and Exercise



- ◆ **Process Bid Invitation**
  - ◆ Solicitation E-mail Notifications – Demo Only.


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## 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.

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## LESSON 5: CREATE SURROGATE BIDS



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## Lesson 5 Learning Objectives



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

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## Create Surrogate Bids

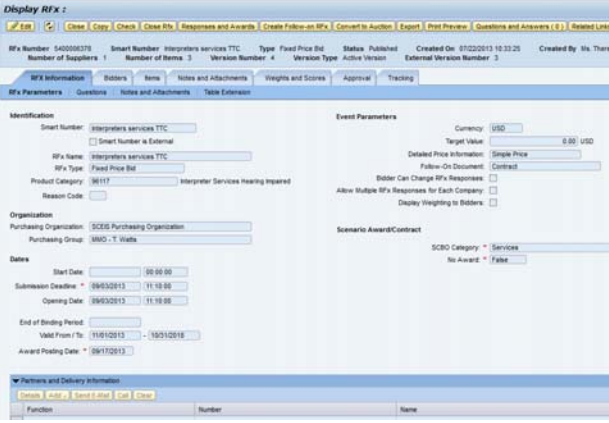


- What is a Surrogate Bid?
  - Surrogate bid process is used when an agency accepts paper bids from a vendor. Because paper bids have to be entered into SRM, the buyer is responsible for entering the bids.
  - The screens a buyer sees when entering a surrogate bid are the same screens a vendor sees when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

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## Extending the Submission Deadline




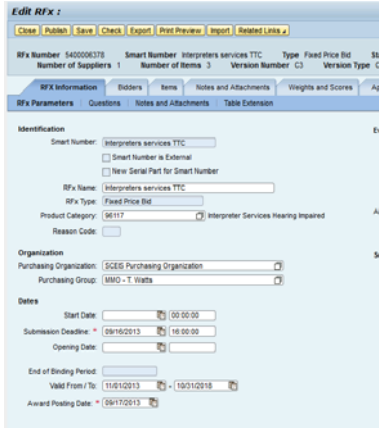


- Prior to entering Surrogate Bids, the Submission Deadline of the solicitation must be extended.
- Click the Edit button, change the Submission Deadline, and remove the Opening Date.

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## Publish the RFX






- 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.

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## 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
5400006454	TERM CONTRACT FOR PICK-UP TRUCKS	ZFB	Deleted		SCEIS Purchasing Organization		0
5400006478	CAT07095 08/13/2013 14:05:21	ZFB	Deleted				0
5400006444	Vehicles - Cab and Chassis - Statewide	ZFB	Published	07210	SCEIS Purchasing Organization	10/01/2013	0
5400006425	OEM Gray Cast Iron Brake Drums	ZFB	Saved	07543	SCEIS Purchasing Organization	10/02/2013	0
5400006409	PROJECT DIRECTOR FOR CREATE	ZRFP	Saved	95877	SCEIS Purchasing Organization	08/05/2013	0
5400006407	Vehicles - Cab and Chassis - Statewide	ZFB	Deleted	07210	SCEIS Purchasing Organization	10/01/2013	0
5400006388	OEM Gray Cast Iron Brake Drum	ZFB	Deleted	07543	SCEIS Purchasing Organization	09/10/2013	0
5400006386	Prosthetic Leg	ZFB	Published		SCEIS Purchasing Organization	08/29/2013	1
5400006378	Interpreters services TTC	ZFPB	Published	96117	SCEIS Purchasing Organization	09/16/2013	0
5400006368	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.

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## 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.

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## Surrogate Bidding



**Responses and Awards**

[First Preview](#) | [Close](#) | [Export](#) | [Questions and Answers \(0\)](#) | [Synopsis](#)

Remaining Time 0 Days 00:00:57 | Smart Number: Interpreters services TTC | Type: Fixed Price Bid | Status: Published | Number of Suppliers: 6

[Response Activity](#) | [Response Comparison](#) | **Surrogate Bidding**

View By: [Bidders Including Contact Persons](#)

**Search by Contact Persons**

Business Partner Organization:  Country:   
 Company Name 1:  Company Name 2:   
 E-Mail:  Minority Status:   
 DUNS:  Women Owned:   
 Postal Code:  City:   
 Maximum Number of Hits:  Surrogate Bid:  [Search](#)


**Bidders**

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	TM
RGB SYSTEMS INC	7000099552				
RGB SPECTRUM	7000133777				
RGB GROUP INC	7000195149		28066	ESPERT	SHIRLEY
RGBURNS INC	700022091				

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

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## Vendor Contact Information



- 🕒 Vendors must have a contact person to enter surrogate bids.
- 🕒 Vendors who have gone through the SCEIS registration process after November 2007 will have a contact person.
- 🕒 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.
- 🕒 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.

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## Response on Behalf



Return to the Response Activity Screen and Click Expand Rows.

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.



## 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

RF's Response Number: 550029351 RF's Number: 540000378 Status: In Process Submission Deadline: 09/16/2013 17:00:00 EST Remaining Time: 0 Days 03:43:19  
 RF's Owner: Mr. Theresa Vitale Target Value: 0.00 USD RF's Response Version Number: Active Version RF's Version Number: 6

RF's Information Items Notes and Attachments Summary Tracking

**Item Overview**

Details Add Items Copy Print Close Estimate Value


Line Number	Description	Product Type	Product ID	Product Category	Product Category Description	Required Quantity	Submitted Quantity	Unit	Price	Currency	Price Per	RF's Response
1.00	Interpreter - Material		58117	Interpreter / Foreign Language Hearing Impaired etc.		1.0	1.0	HR	0.00	USD	1.00	1.00
2.00	Interpreter - Material		58117	Interpreter Services Hearing Impaired		1.0	1.0	HR	0.00	USD	1.00	1.00
3.00	Interpreter - Material		58117	Interpreter Services Hearing Impaired		1.0	1.0	HR	0.00	USD	1.00	1.00

Details for Item 1 Interpreters services for students

Item Data Questions Notes and Attachments Delivery Subcontracting Payment

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## Demonstration and Exercise




➔

- ◆ **Process Bid Invitation**
  - ◆ Create Surrogate Bid – Exercise 5.


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## Lesson 5 Summary




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

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South Carolina Enterprise Information System

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



STATE INFORMATION TECHNOLOGY  
BICB  
SC BUDGET AND CONTROL BOARD

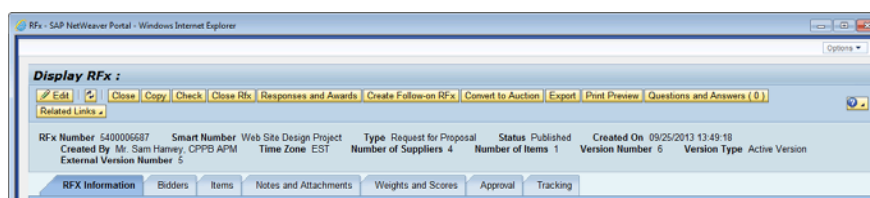
## Lesson 6 Learning Objectives



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

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## Responses and Awards

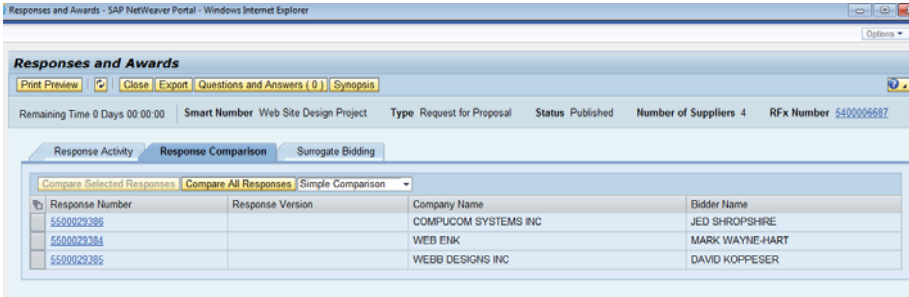


- Vendor Bids can be viewed, compared, and awarded in Responses and Awards.
- Preference Calculations are not completed in SCEIS. The buyer must calculate the preferences. The preference calculator is available at [www.procurement.sc.gov](http://www.procurement.sc.gov).

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## Response Comparison





**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 5400005687

Response Activity **Response Comparison** Surrogate Bidding


Compare Selected Responses Compare All Responses Simple Comparison

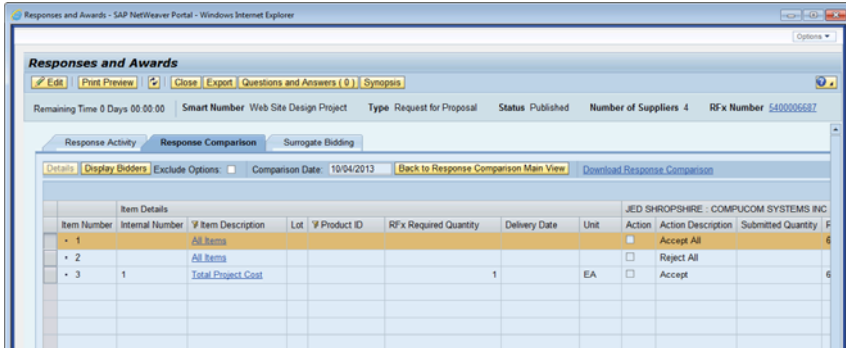
Response Number	Response Version	Company Name	Bidder Name
5500029386		COMPUCOM SYSTEMS INC	JED SHROPSHIRE
5500029384		WEB ENK	MARK WAYNE-HART
5500029385		WEBB DESIGNS INC	DAVID KOPFESER

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

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## Response Comparison





**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 5400005687

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

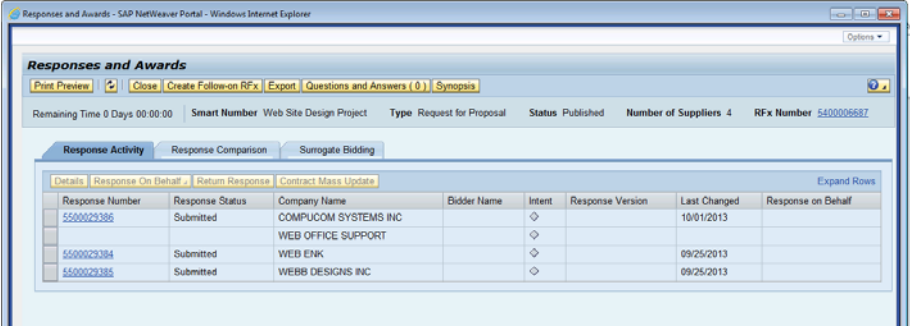
Item Number	Internal Number	Item Description	Lot	Product ID	RFx Required Quantity	Delivery Date	Unit	Action	Action Description	Submitted Quantity
1		All Items						<input type="checkbox"/>	Accept All	6
2		All Items						<input type="checkbox"/>	Reject All	
3	1	Total Project Cost			1		EA	<input type="checkbox"/>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

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

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## Response Activity





**Responses and Awards**

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


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

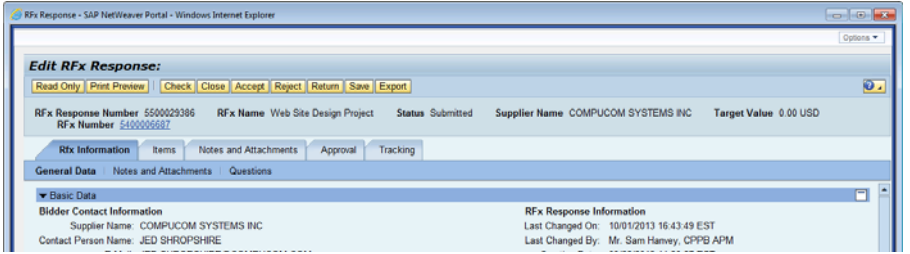
- 🕒 To print a hardcopy of an on-line bid:
  - Go to Response Activity Tab.
  - Click the Response Number to open the Bidder's response.

(continued ...)

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## Response Activity





**Edit RFx Response:**

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**

<b>Bidder Contact Information</b>	<b>RFx Response Information</b>
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 Hamey, CPPB APM

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

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## 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.

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## 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](#) | 
 [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: [540000373](#)

[Response Activity](#) | 
 [Response Comparison](#) | 
 [Surrogate Bidding](#)

Response Number	Response Status	Company Name	Bidder Name	Intent	Response Version	Last Changed	Response on Behalf
<a href="#">1500029351</a>	Submitted	ROB TERPWORKS	ROBB BURRESS MACK	◇		08/16/2013	Activated
<a href="#">1500029351</a>	Submitted	SCES BIDDER		◇			Activated

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## Creating Contract/PO



- ④ 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.
- ④ 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.


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## Creating Contracts




- 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.

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**Demonstration and Exercise** 

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 **◆ Accept and Create Purchase Order and Contract**

- ◆ Evaluate Bids and Create Contract – Exercise 6.

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**Lesson 6 Summary** 


---

 You should now be able to:


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

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**LESSON 7: MAINTAIN CONTRACTS  
AND AWARD STATEMENTS**




### Lesson 7 Learning Objectives

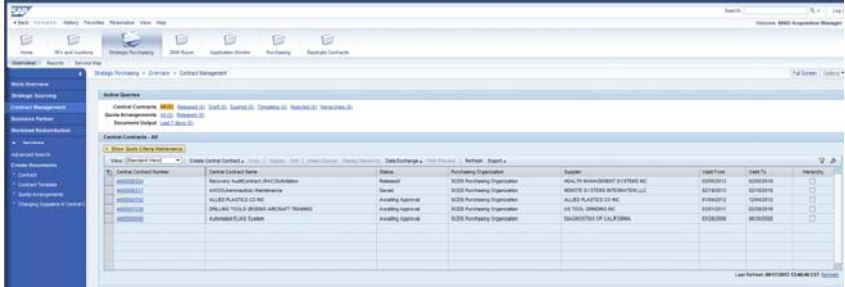


- Upon completion of this lesson, you should be able to:
  - Change contract data.
  - Understand SAP Document Builder's role in creating award statements.
  - Post award documents to the website.
  - Activate web posting date/time.
  - Send email award notification.

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## Strategic Purchasing - Contract Management




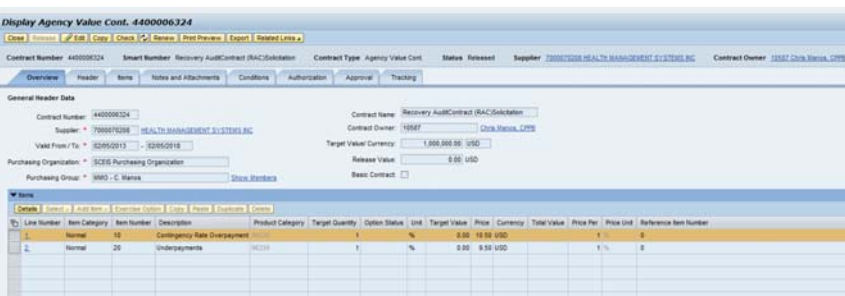


- 🕒 Contracts appear in a list.
- 🕒 Quick Criteria Maintenance allows buyers to search for contracts.
- 🕒 Contracts must have a status of Released in order to be Valid.

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## Contract Overview






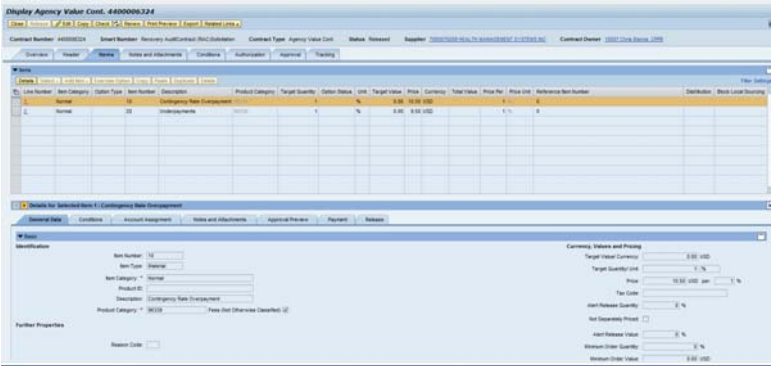
- 🕒 The contract Overview shows:
  - Valid From/To
  - Target Value
  - Overview of Line Items
- 🕒 Use the Edit button to change the contract.

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## Items




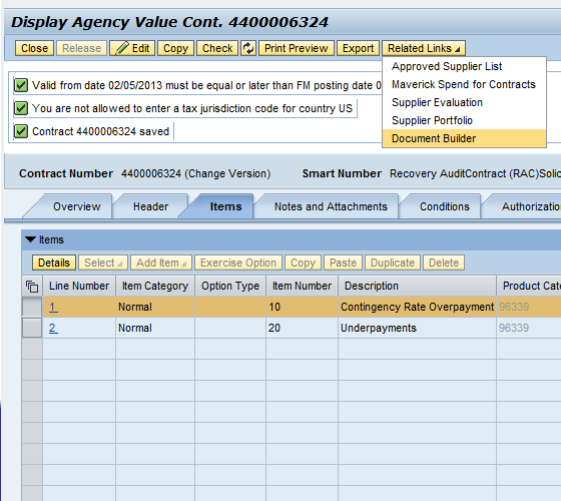
- The Items tab shows a list of items on the contract.
- The details of the line items are included in the tabs at the bottom of the window.



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## Creating Award Statements/Intents




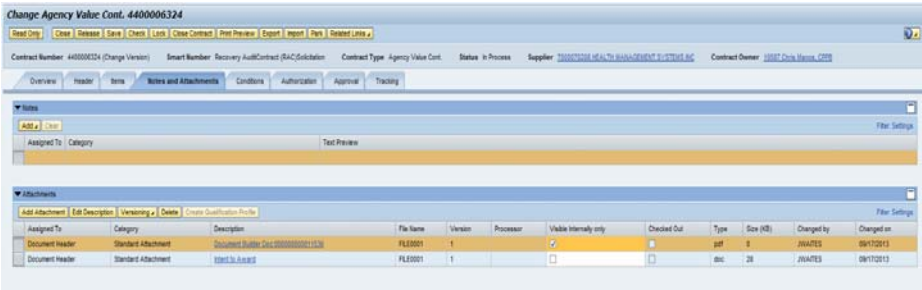


- Access Doc Builder from Related Links to generate an award document.
- The Contract must be in Saved Status.
- Doc Builder functionality is the same as in the RFx.
- There is a series of four dialog questions to answer.

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## Posting Award Statements/Intents






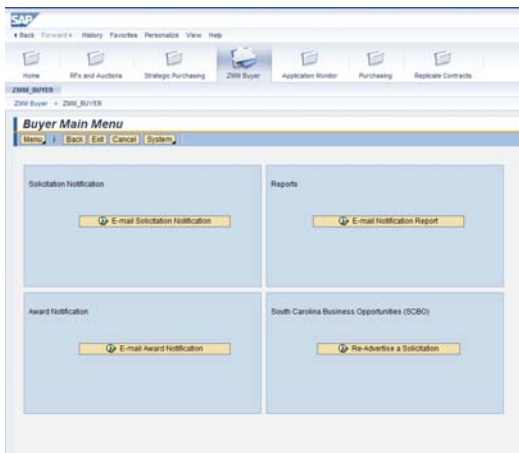
Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Standard Attachment	Required Bidder Doc 4400006324	FL2001	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	PDF	1	JWATES	09/17/2013
Document Header	Standard Attachment	Request to Buy	FL2001	1		<input type="checkbox"/>	<input type="checkbox"/>	Doc	28	JWATES	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.

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## 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.

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## Demonstration and Exercise



- ◆ Exercise 7 Edit Contract and Create an Award Document.
- ◆ ZMM\_Buyer Award Email Notification – Demo only.

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## 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.

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**Lesson 8 Learning Objectives** 

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

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## Close RFx




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🕒 When to close an RFx:

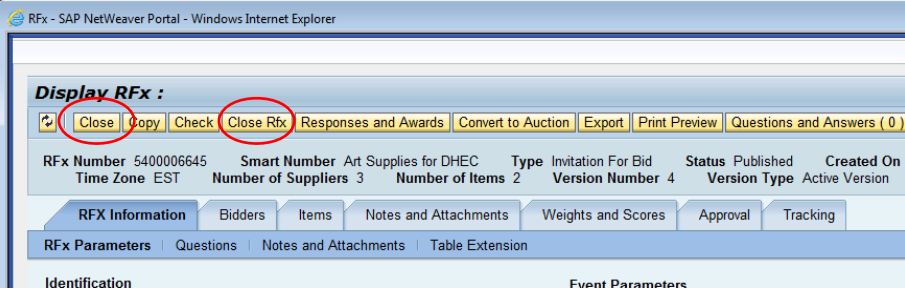
- After you have created, published, and issued your Intent to Award or Statement of Award, you may Close the RFx.
- The RFx should not be closed until the protest period/process is complete.
- No additional processing can occur on an RFx that is closed.
- The solicitation can still be searched and viewed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

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## Close RFx



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The screenshot shows a web interface for displaying an RFx. The toolbar contains 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, there is a table with the following data:

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.

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## Lesson 8 Summary



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

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## Course Summary



- 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.

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## Course Summary cont.



- 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.

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## Course Summary cont.



- 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.

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## Any Questions?



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## Next Steps

- 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**

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## Evaluation



***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**

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