



pennsylvania
DEPARTMENT OF GENERAL SERVICES



Supplier
Relationship
Management

SRM 7.0:

Creating & Maintaining Solicitations (RFx) & Contracts

Course Number:
V001

Welcome!

Introductions



pennsylvania

DEPARTMENT OF GENERAL SERVICES

Course Objectives

Course Objectives

- After successfully completing this course you will be able to:
 - Understand the special features of SRM 7.0
 - Redistribute work to other sourcing professionals
 - Source a requirement
 - Create and edit solicitation documents
 - Create and edit legal documents in Doc Builder
 - Publish solicitations in the Supplier Portal
 - Open, evaluate, and award responses to solicitations
 - Create and edit contracts

Agenda

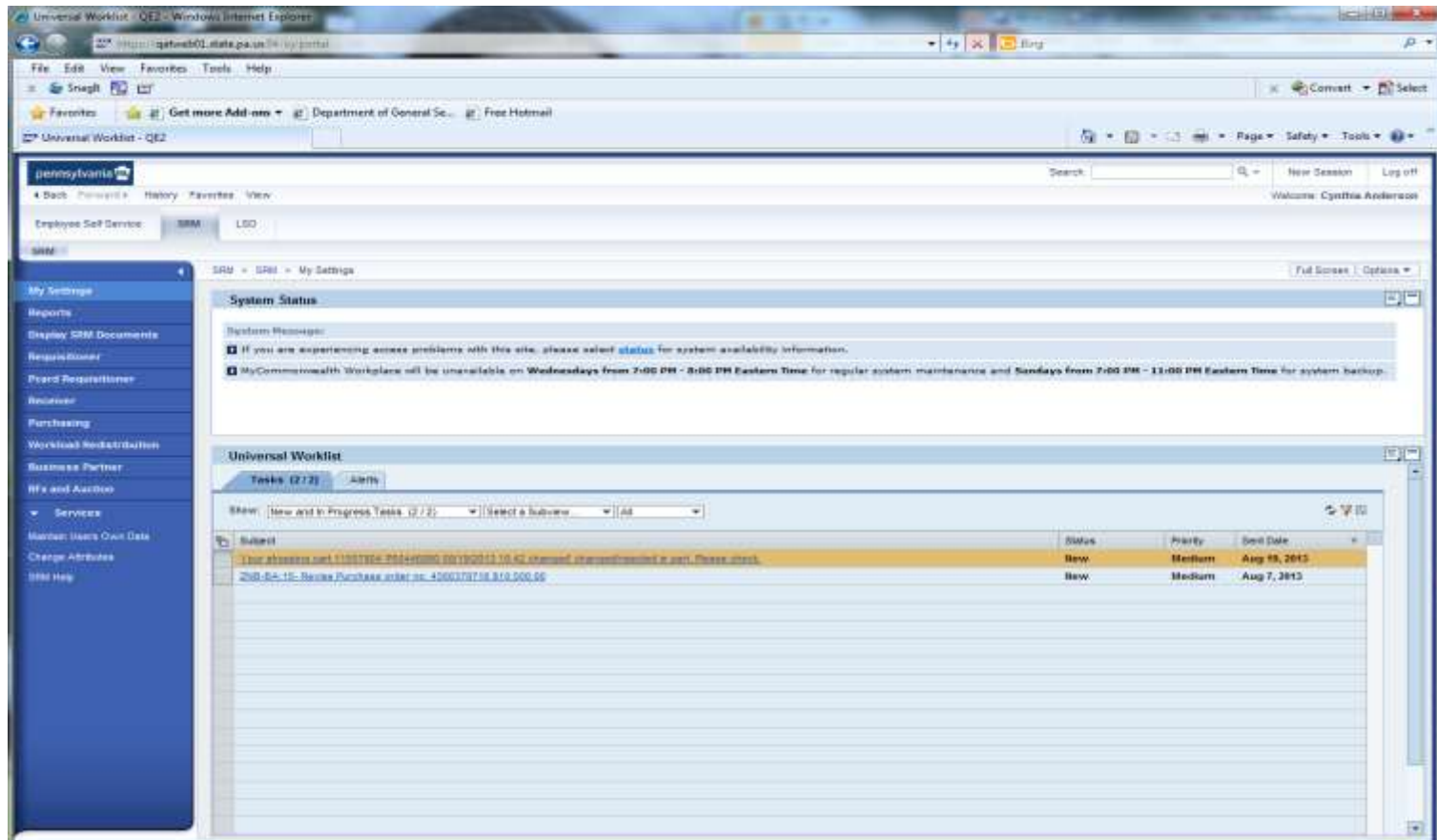
- SRM 7.0: Introduction and Overview
- Workload Redistribution
- Sourcing Requisitions
- Editing a Draft RFx
- Responses and Awards
- Create the Contract

SRM 7.0: Introduction and Overview

Overview of SRM 7.0

Logging In

The SAP/SRM Portal Desktop is accessible through www.myworkplace.state.pa.us



Universal Worklist - Q02 - Windows Internet Explorer

http://myworkplace.state.pa.us:8000/portal

File Edit View Favorites Tools Help

Search: []

New Session Log off

Welcome: Cynthia Anderson

Employee Self Service SRM LSD

SRM

My Settings

Reports

Display SRM Documents

Requisitioner

Posted Requisitioner

Requirer

Purchasing

Workload Redistribution

Business Partner

Rfx and Auction

Services

Master: User's Own Data

Change Attributes

SRM Help

SRM - SRM - My Settings

Full Screen Options

System Status

System Messages:

If you are experiencing access problems with this site, please select [status](#) for system availability information.

MyCommonwealth Workplace will be unavailable on Wednesdays from 7:00 PM - 8:00 PM Eastern Time for regular system maintenance and Sundays from 7:00 PM - 11:00 PM Eastern Time for system backup.

Universal Worklist

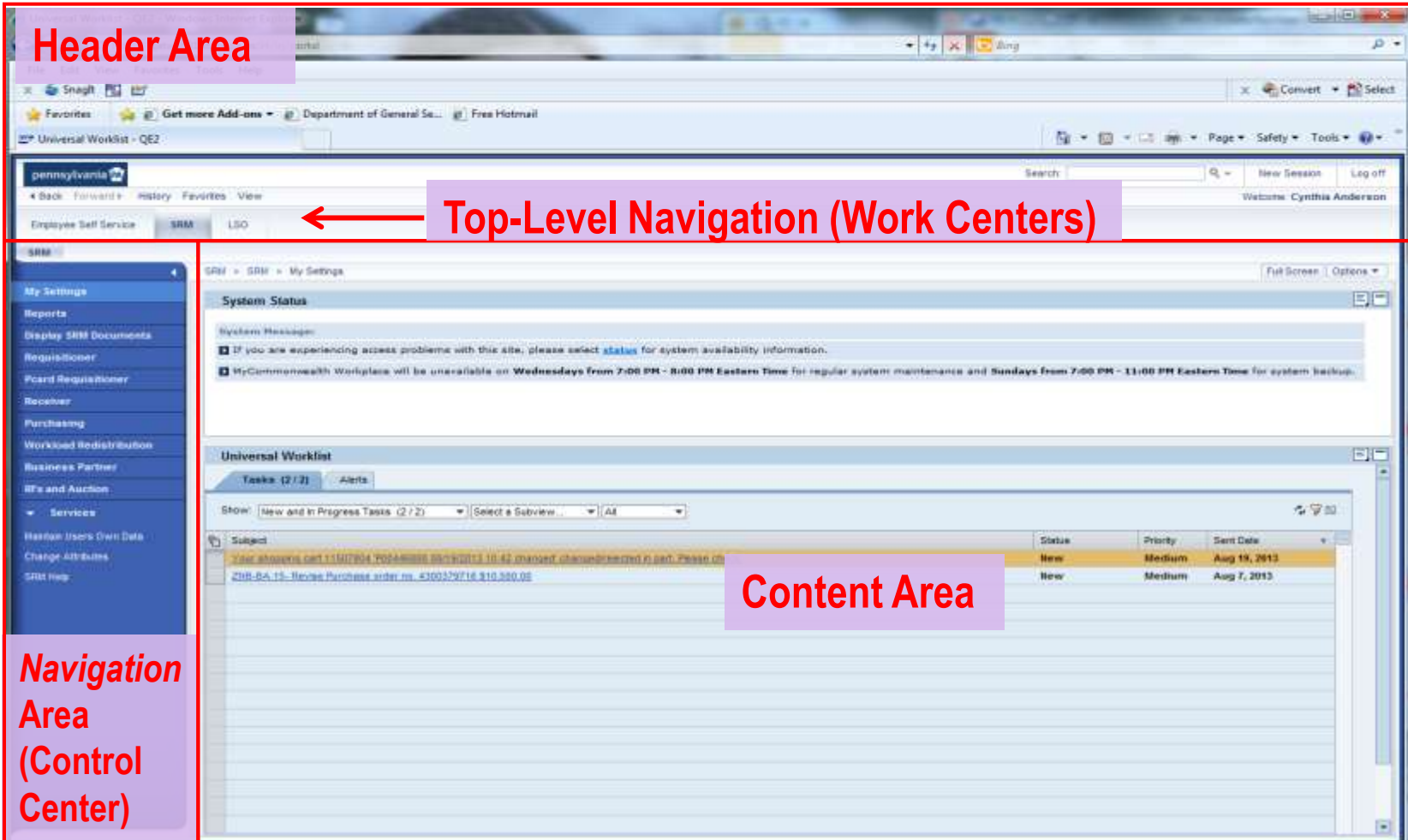
Tasks (2/2) Alerts

Show: New and In Progress Tasks (2/2) Select a Subview All

Subject	Status	Priority	Due Date
Your alibaba.com 11017004 88440000 00190011 10.42 changed. unauthenticated user. Please check.	New	Medium	Aug 19, 2013
2nd-B4-10-Recurs Purchase order no. 4500378758 810,500.00	New	Medium	Aug 7, 2013

Overview of SRM 7.0

Portal Desktop Landscape



The screenshot shows the SRM 7.0 Portal Desktop Landscape. The interface is divided into several key areas:

- Header Area:** Located at the top of the page, containing the Pennsylvania Department of General Services logo, search bar, and user information (Cynthia Anderson).
- Top-Level Navigation (Work Centers):** A horizontal bar below the header area with links to Employee Self Service, SRM, and LSO. A red arrow points to this bar.
- Navigation Area (Control Center):** A vertical sidebar on the left side of the page, containing links to My Settings, Reports, Display SRM Documents, Requisitioner, Point Requisitioner, Repeater, Purchasing, Workload Redistribution, Business Partner, RFIs and Auction, Services, Handle Users Own Data, Change Attributes, and SRM Help.
- Content Area:** The main body of the page, displaying system status messages and a Universal Worklist table. A red arrow points to this area.

System Status:

System Message:

- If you are experiencing access problems with this site, please select [status](#) for system availability information.
- MyCommonwealth Workplace will be unavailable on **Wednesdays from 7:00 PM - 8:00 PM Eastern Time** for regular system maintenance and **Sundays from 7:00 PM - 11:00 PM Eastern Time** for system backup.

Universal Worklist:

Tasks (2 / 2) Alerts

Show: New and In Progress Tasks (2 / 2) Select a Subview: All

Subject	Status	Priority	Sent Date
Your shopping cart 11517804-2024-08-08 10:42 changed character/changed to cart. Please click here to view details.	New	Medium	Aug 18, 2013
2013-SA-15- Bridge Purchase order no. 4300379716 \$10,380.00	New	Medium	Aug 7, 2013

Overview of SRM 7.0

Navigating the User Interface

- Roles
 - Your user role(s) are assigned by position
 - Access to your role(s) are within the *Control Center* (e.g., left navigation pane)
- Transactions
 - Upon selection of a specific role, the associated activities and transactions display as Worksets in 7.0

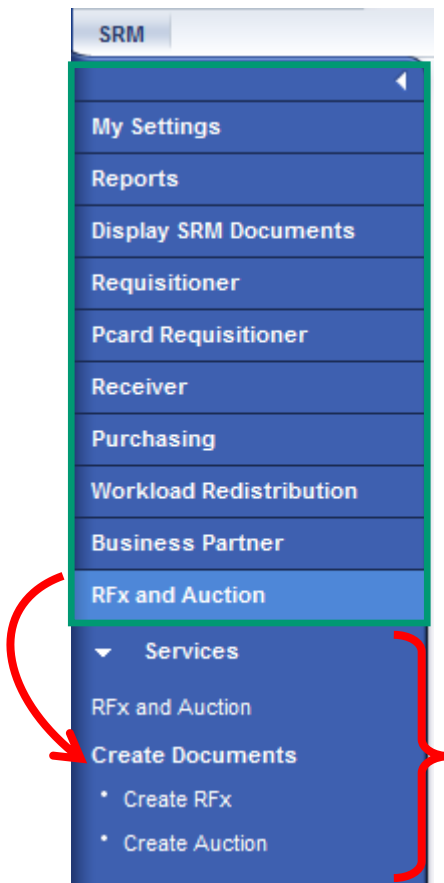
Overview of SRM 7.0

Navigating the User Interface

- Worksets
 - Groups of role-specific activities and/or transactions which display when the corresponding role is selected
 - Multiple levels of Worksets are permitted in SRM 7.0
- Document Landscape
 - SRM 7.0 document landscapes have elements contained in both SRM 5.0 and in SAP R/3
 - Examples will be shown throughout the course

Overview of SRM 7.0

Control Center in SRM 7.0



- When a role is selected, Worksets assigned to the user are displayed
 - If applicable, an additional Workset is displayed below the initial result as shown in this screen capture

Overview of SRM 7.0

Personal Object Worklist (POWL)

SRM

SRM > SRM > RFX and Auction Full Screen Options

RFxs - All Auctions - All

Search Criteria

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
6100027555	CHESTER PRODUCE - JANUARY 2014 10785686	BID	Published		Corrections Purchasing Organization	12/20/2013	0
6100027554	P00524819 12/12/2013 08:37	RFPS	Saved		DPW Purchasing Organization	12/16/2013	0
6100027553	SCI Chester Juice Bar Bid	BID	Published		Corrections Purchasing Organization	12/17/2013	0
6100027552	11-SCI CHS Pork Bid	BID	Published		Corrections Purchasing Organization	12/18/2013	0
6100027551	1152 EGG WHITES, FRZ	BID	Published		Corrections Purchasing Organization	12/23/2013	0
6100027548	784095000 Guide rail items	RFQU	Published		PennDOT Purchasing Organization	12/26/2013	0
6100027546	1148-Seafood	BID	Published		Corrections Purchasing Organization	12/19/2013	0
6100027545	P00505692 12/11/2013 09:46:17	BID	Published		PennDOT Purchasing Organization	12/27/2013	0
6100027544	1148-Beef Products	BID	Published		Corrections Purchasing Organization	12/20/2013	0
6100027543	1144 NAL - Misc. Frozen Foods	BID	Published		Corrections Purchasing Organization	12/27/2013	1

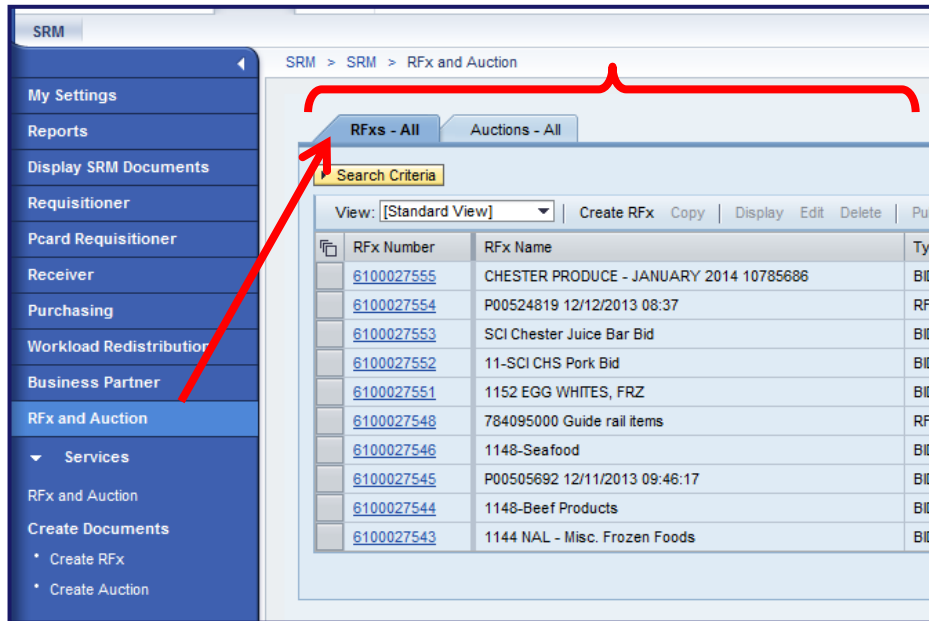
Last Refresh 12/12/2013 13:49:19 EST [Refresh](#)

My Settings
Reports
Display SRM Documents
Requisitioner
Pcard Requisitioner
Receiver
Purchasing
Workload Redistribution
Business Partner
RFx and Auction
Services
RFx and Auction
Create Documents
Create RFX
Create Auction

- The POWL is located in the content area of the portal desktop

Overview of SRM 7.0

Personal Object Worklist (POWL)



SRM > SRM > RFx and Auction

RFxs - All | Auctions - All

Search Criteria

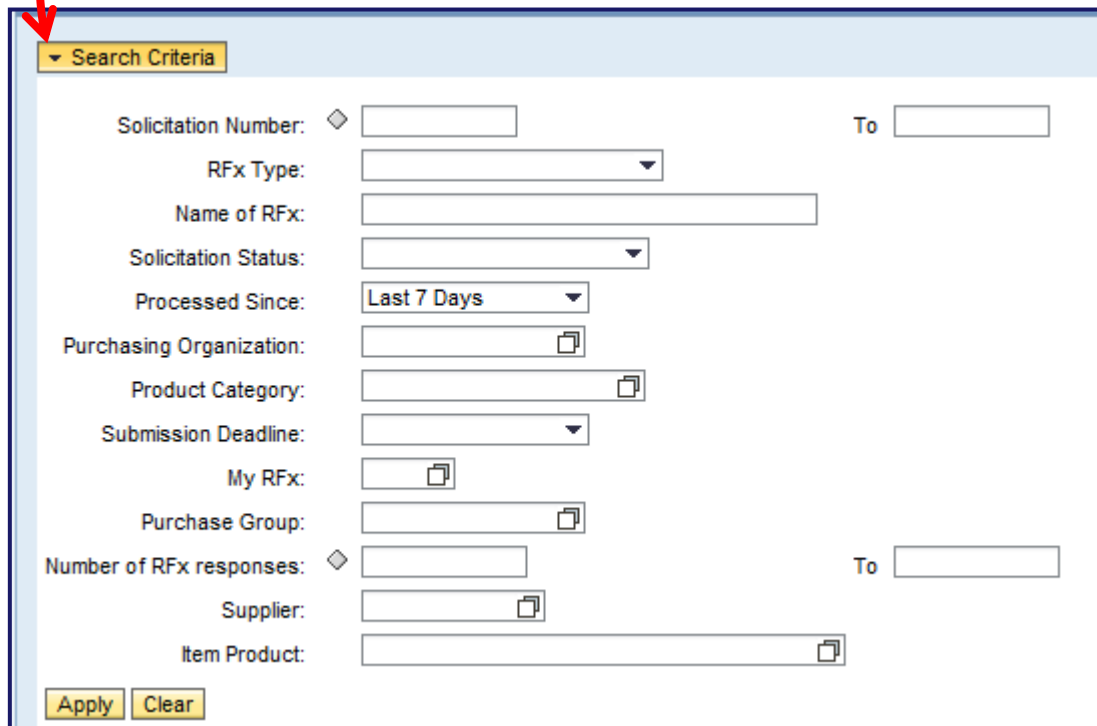
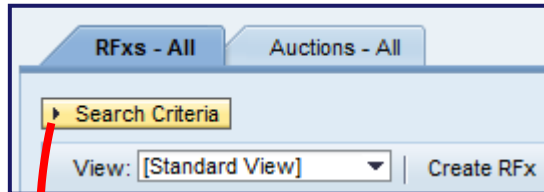
View: [Standard View] | Create RFx | Copy | Display | Edit | Delete | Pub

RFx Number	RFx Name	Type
6100027555	CHESTER PRODUCE - JANUARY 2014 10785686	BID
6100027554	P00524819 12/12/2013 08:37	RFP
6100027553	SCI Chester Juice Bar Bid	BID
6100027552	11-SCI CHS Pork Bid	BID
6100027551	1152 EGG WHITES, FRZ	BID
6100027548	784095000 Guide rail items	RFC
6100027546	1148-Seafood	BID
6100027545	P00505692 12/11/2013 09:46:17	BID
6100027544	1148-Beef Products	BID
6100027543	1144 NAL - Misc. Frozen Foods	BID

- It is a query-driven worklist containing procurement documents from your work area
 - The Active Queries displayed will vary depending upon the selected Workset

Overview of SRM 7.0

Personal Object Worklist (POWL)



- Display query fields by selecting the SEARCH CRITERIA button

Overview of SRM 7.0

Personal Object Worklist (POWL)

RFxs - All Auctions - All

Search Criteria

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
6100026211	P00446880 09/13/2013 10:55	BID	Published		COPA Purchasing Organization	09/13/2013	2
6100026210	P00068292 09/13/2013 10:31	BID	Saved		COPA Purchasing Organization	10/31/2013	0
6100026129	4618 Hard Hats for Bid Approval	BID	Published		COPA Purchasing Organization	09/04/2014	0
6100026115	Copy of 6100026114	BID	Published		COPA Purchasing Organization	12/29/2099	1
6100026114	P00029597 08/28/2013 13:03	BID	Published		COPA Purchasing Organization	12/29/2099	0
6100026113	Copy of 6100026094	BID	Awaiting Approval		COPA Purchasing Organization	12/29/2099	0
6100026093	P00102400 08/22/2013 13:42	BID	Published		COPA Purchasing Organization	08/22/2014	0
6100026023	P00029597 08/15/2013 11:30	BID	Release Rejected		COPA Purchasing Organization	08/25/2013	0
6100026011	P00102400 08/15/2013 08:16	BID	Published		COPA Purchasing Organization	08/15/2014	0
6100025981	P00029729 08/12/2013 09:57	BID	Release Rejected		COPA Purchasing Organization	08/12/2014	0

Last Refresh 12/12/2013 14:51:47 EST [Refresh](#)

- Results of the selected query are displayed in a table format
- “One-Step” buttons are available at the top of each query
 - To make additional One-Step options available, choose a document to work with

Overview of SRM 7.0

Sample Document Landscape (RFx)

Create RFx

Publish

Check

Save

Print Preview

Close

Related Links

RFx Number

6100004516

Smart Number

P00068292 08/15/2013 09:05

Type

Invitation For Bid

Status

In Process

Created On

08/15/2013 09:05:27

Created By

Angela Eshleman

Time Zone

EST

Number of Suppliers

0

Number of Items

0

Version Number

Version Type

Active Version

External Version Number

RFx Information

Bidders

Items

Notes and Attachments

Conditions

Approval

Tracking

RFx Parameters

Questions

Notes and Attachments

Conditions

Identification

Smart Number:

P00068292 08/15/2013 09:05

☐ Smart Number is External

RFx Type:

Invitation For Bid

Bid Description:

Publication Type:

Public RFx

Event Parameters

Detailed Price Information:

Price with Conditions

Follow-On Document:

Purchase Order or Contract

Bidder Can Change RFx Responses:

☒

Allow Multiple RFx Responses for Each Company:

☐

Scenario Award/Contract

Organization

Purchasing Organization:

COPA Purchasing Organization

Purchasing Group:

XB1 - DGS Angela L Eshleman

Show Members

Dates

Start Date:

00:00:00

Submission Deadline: *

00:00:00

Opening Date:

00:00:00

Partners and Delivery Information

Details

Add

Send E-Mail

Call

Clear

Filter Settings

Function	Number	Name	Phone Number
Requester	337344	Angela Eshleman	
Goods Recipient			
Responsible Employee			
Ship-To Address			
Location			

This is an example of a document landscape. Displayed is the initial tab (RFx Information) upon creation or entry of an RFx.

Overview of SRM 7.0

Sample Document Landscape (RFx)

Title and Header Area

Create RFx

RFx Number	6100004516	Smart Number	P00068292	08/15/2013 09:05	Type	Invitation For Bid	Status	In Process	Created On	08/15/2013 09:05:27
Created By	Angela Eshleman	Time Zone	EST	Number of Suppliers	0	Number of Items	0	Version Number		Version Type
External Version Number										Active Version

- Title and Header areas contain command buttons, and information about the document such as document number, document type, status, document date, time zone, and number of suppliers

Tab Pages

RFX Information	Bidders	Items	Notes and Attachments	Conditions	Approval	Tracking
Rfx Parameters	Questions	Notes and Attachments	Conditions			

Sub Tabs

- Various data is contained throughout each of the tabs and sub-tabs. For example, Notes and Attachments tab would contain text and attachments.

Overview of SRM 7.0

Sample Document Landscape (RFx)

Create RFx

[Publish](#) [Check](#) [Save](#) [Print Preview](#) [Close](#) [Related Links](#)

RFx Number 6100004516 **Smart Number** P00068292 08/15/2013 09:05 **Type** Invitation For Bid **Status** In Process **Created On** 08/15/2013 09:05:27
Created By Angela Eshleman **Time Zone** EST **Number of Suppliers** 0 **Number of Items** 0 **Version Number** **Version Type** Active Version
External Version Number

[RFX Information](#) | [Bidders](#) | [Items](#) | [Notes and Attachments](#) | [Conditions](#) | [Approval](#) | [Tracking](#)

[RFX Parameters](#) | [Questions](#) | [Notes and Attachments](#) | [Conditions](#)

Identification

Smart Number:

☐ Smart Number is External

RFx Type:

Bid Description:

Publication Type:

Organization

Purchasing Organization:

Purchasing Group: [Show Members](#)

Dates

Start Date:

Submission Deadline: *

Opening Date:

Event Parameters

Detailed Price Information:

Follow-On Document:

Bidder Can Change RFx Responses: ☒

Allow Multiple RFx Responses for Each Company: ☐

Scenario Award/Contract

The area where data is entered is known as the Application Area.

Application Area

▼ **Partners and Delivery Information**

[Details](#) [Add](#) [Send E-Mail](#) [Call](#) [Clear](#)

Filter Settings

Function	Number	Name	Phone Number
▪ Requester	337344	Angela Eshleman	
▪ Goods Recipient			
▪ Responsible Employee			
▪ Ship-To Address			
▪ Location			

Overview of SRM 7.0

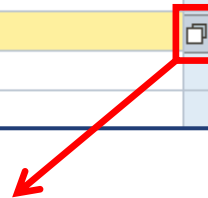
Search Feature

- Select the match code icon to open a dialog box to input the search criteria

▼ Partner

Details Add Send E-Mail Call Clear

Function	Number	Na
Requester	337344	Ar
Vendor		
Goods Recipient		
Ship-To Address		
Location		



All Values: Goods Recipient

Search Criteria Personal Value List Settings Hide Search Criteria

Business Partner:

Name 1/last name:

Name 2/First name:

Search term 1:

Search term 2:

User Name:

E-Mail Address:

Org. Unit Name:

BP Org. Unit:

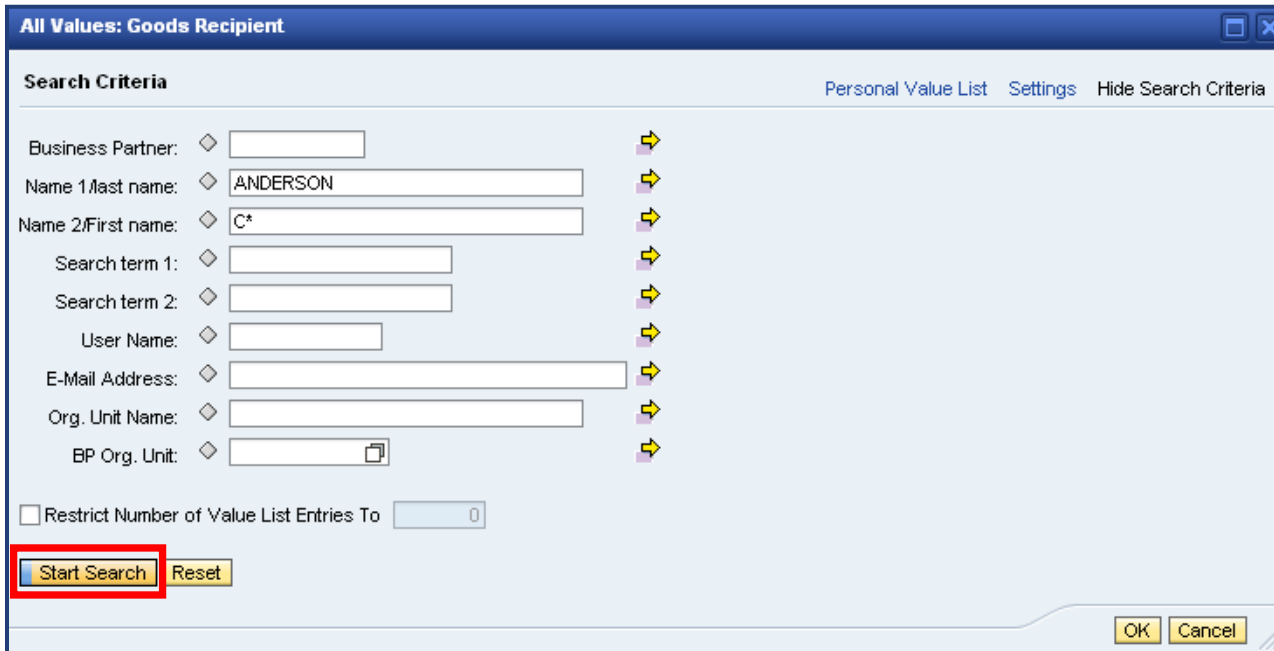
☒ Restrict Number of Value List Entries To

Start Search Reset

OK Cancel


Overview of SRM 7.0


Search Feature





All Values: Goods Recipient


Search Criteria [Personal Value List](#) [Settings](#) [Hide Search Criteria](#)


Business Partner: 


Name 1/last name: 


Name 2/First name: 


Search term 1: 

Search term 2: 

User Name: 

E-Mail Address: 

Org. Unit Name: 

BP Org. Unit: 

☐ Restrict Number of Value List Entries To

Start Search **Reset**

OK **Cancel**

- Enter the applicable criteria and select the **START SEARCH** button

Overview of SRM 7.0

Search Feature

All Values: Goods Recipient

Search Criteria Personal Value List Settings Hide Search Criteria

Business Partner:

Name 1/last name:

Name 2/First name:

Search term 1:

Search term 2:

User Name:

E-Mail Address:

Org. Unit Name:

BP Org. Unit:

☐ Restrict Number of Value List Entries To

Results List: 6 results found for number

	Last name	First name	Org. Unit Name	BusinessPartner
<input type="checkbox"/>	Anderson	Clarence	CRGRN4300	310940
<input type="checkbox"/>	Anderson	Christina	LWD0110	314705
<input type="checkbox"/>	Anderson	Constance	LIBR9148	324894
<input type="checkbox"/>	Anderson	Charles	GSCC1200	326377
<input type="checkbox"/>	Anderson	Christine	EXCW8000	336935
<input type="checkbox"/>	Anderson	Cynthia	GSPR7140	337326

- The Results List displays
- Highlight the desired item and select the OK button

Overview of SRM 7.0

Search Feature

▼ Partner

Details Add ▾ Send E-Mail Call Clear





Function	Number	Name
▪ Requester	337344	Angela Eshleman
▶ Vendor		
▪ Goods Recipient	337326	Cynthia Anderson
▪ Ship-To Address		
▪ Location		

- The chosen value is transferred into the applicable field

Overview of SRM 7.0

Edit RFx :

[Publish](#)
[Check](#)
[Save](#)
[Print Preview](#)
[Close](#)
[Related Links](#)
[Read Only](#)
[Delete](#)

 Enter the submission deadline
 Enter exactly one partner of type Responsible Employee
 Enter at least one partner of type Portal Provider Or Bidder
 Mandatory Attributes Not Maintained

RFx Number: 6100004510 Smart Number: 15 EMS Supplies_Services FY 14-15 Type: Invitation For Bid Status: Saved Created By: Angela Eshleman
 Time Zone: EST Number of Suppliers: 5 Number of Items: 4 Version Number:
 External Version Number:

[RFX Information](#)
[Bidders](#)
[Items](#)
[Notes and Attachments](#)
[Conditions](#)
[Approval](#)
[Tracking](#)

[RFX Parameters](#)
[Questions](#)
[Notes and Attachments](#)
[Conditions](#)

Identification
 Smart Number:
☐ Smart Number is External
 RFx Type:

Event Parameters
 Detailed Price Information
 Follow-On Document
 Bidder Can Change RFx Response
 Allow Multiple RFx Responses for Each Company

- Tips, Warnings, and Error messages are located at the top of the screen



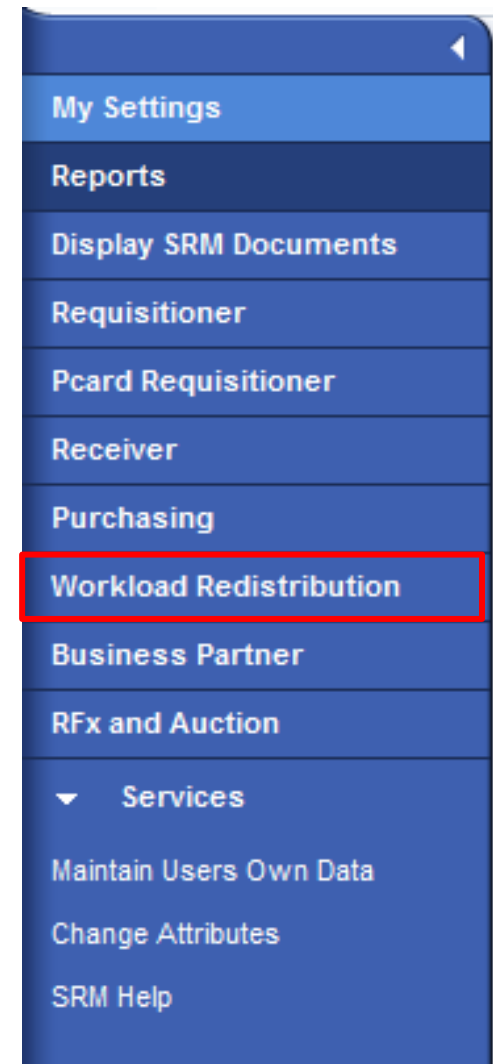
pennsylvania

DEPARTMENT OF GENERAL SERVICES

Workload Redistribution

Assigning Work

- Select **Workload Redistribution**



Assigning Work

If you are authorized to assign work to others:

- Use Workload Redistribution to assign requirements to specific groups or sourcing professionals
 - Sends the Requirements to Carry Out Sourcing
- This transaction is also used to reassign responsibility for:
 - RFX (Solicitations), Contracts, and POs
 - Sole Source Material carts to DGS Bureau of Procurement

Assigning Work

- In SRM, a shopping cart might contain more than one type of commodity
 - The line items are listed separately in the Workload Redistribution sourcing area
- Assign individual line items to a Purchaser
 - The Purchaser will later select the individual line items to process

Assigning Work

Finding Potential Assignments



Search for Documents

Document Types

Requirements: ☒

Purchase Orders: ☐

RFxs: ☐

Contracts: ☐

Status: All

Purchasing Organization: COPA Purchasing Organization

Purchasing Group: XC3 - DGS Cynthia K. Anderson

Document Number:

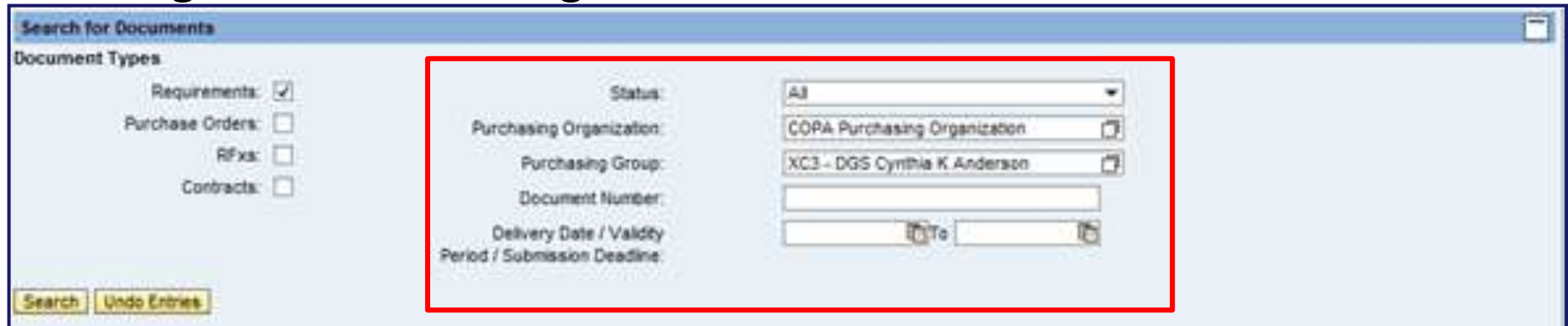
Delivery Date / Validity Period / Submission Deadline:

Search Undo Entries

- Use the checkboxes to identify what type(s) of document to view
 - Requirements, Purchase Orders, RFx (Solicitations), and Contracts are available options

Assigning Work

Finding Potential Assignments



Search for Documents

Document Types

Requirements: ☒

Purchase Orders: ☐

RFIs: ☐

Contracts: ☐

Status: All

Purchasing Organization: COPA Purchasing Organization

Purchasing Group: XC3 - DGS Cynthia K. Anderson

Document Number:

Delivery Date / Validity Period / Submission Deadline:

Search Undo Entries

- Use other criteria from dropdown menus to further refine the type of documents to be viewed
 - The Purchasing Group defaults to the buyer's group, so it must be verified or changed
 - Select "In Process" from the Status dropdown menu
 - After selecting the desired search criteria, select the SEARCH button



The screenshot shows the SAP Search Results interface. At the top, it says "Search Result: 1 Documents". Below this, there are buttons for "Select All", "Assign To", "Go", "Assign Automatically", and "Refresh Messages". A "Filter Settings" link is also visible. The main table has the following columns: Document Number, Document Name, Type, Status, Purchasing Organization, and Purchasing Group. The first row is highlighted in orange and contains the following data:

Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Group
001000023771	OptiPlex 760 Min tower, OptiPlex 760 Min		Completed	COPA Purchasing Organization	XC3 - DGS Cynthia K Anderson

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

The screenshot shows the SAP Search Results interface. At the top, it says "Search Result : 1 Documents". Below this, there are several buttons: "Select All" (highlighted with a red box), "Assign To:" followed by a dropdown menu, "Go", "Assign Automatically", "Refresh Messages", and "Filter Settings". The main area contains a table with the following columns: Document Number, Document Name, Type, Status, Purchasing Organization, and Purchasing Group. One row is highlighted in orange, indicating it is selected. This row has the following values: Document Number: 0015000023771, Document Name: OptiPlex 760 Min tower,OptiPlex 760 Min, Type: , Status: Completed, Purchasing Organization: COPA Purchasing Organization, and Purchasing Group: XC3 - DGS Cynthia K Anderson.

Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Group
0015000023771	OptiPlex 760 Min tower,OptiPlex 760 Min		Completed	COPA Purchasing Organization	XC3 - DGS Cynthia K Anderson

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

[illegible]

- Use the match code to select the Purchasing Organization and Purchasing Group in which the work is to be assigned
- Select the GO button
- Do not use the ASSIGN AUTOMATICALLY button

Assigning Work

Making the Assignment

☒ Processing of the documents has been completed

Search for Documents

Document Types

Requirements: ☒ Status: All

Purchase Orders: ☐ Purchasing Organization: COPA Purchasing Organization

RFxs: ☐ Purchasing Group: XC3 - DGS Cynthia K Anderson

Contracts: ☐ Document Number:

Delivery Date / Validity Period / Submission Deadline: To

Search **Undo Entries**

Search Result : 1 Documents

Select All | Assign To: COPA Purchasing Organization | YK2-1504-GS Mtls Div | **Go** | **Assign Automatically** **Refresh Messages** [Filter Settings](#)

Document Number	Document Name	Type	Status	Purchasing Organization	Purchasing Group
0010008237 / 1	OptiPlex 760 Minitower;OptiPlex 760 Min	Shopping Cart	Completed	COPA Purchasing Organization	XC3 - DGS Cynthia K Anderson

- A message will display stating, “Processing of the documents has been completed”

Understanding RFx Documents

Understanding RFx Documents

A solicitation document:

- May be created directly from the Carry Out Sourcing assignment screen
 - Use this option whenever possible
- May be created as a copy of an existing solicitation
- May be created as a new document

Understanding RFx Documents

Five Types of Solicitation Documents

- Each type should be used, and referred to, in the correct way for legal and business purposes

Note: A responder to a solicitation must be deemed responsive and responsible in order to receive an award.

Understanding RFx Documents

Invitation for Bid (IFB)

No contract currently exists; a competitive solicitation process is required	Supplier submits a bid for a specific item with specific criteria	COPA awards based on low price
--	---	--------------------------------

Scenario:

- LCB requisitions plastic (“poly”) bags for its retail stores
 - The bags are a new item and no contract for them exists
 - The agency developed its own specifications for the bags regarding size, strength, artwork, and other criteria
 - The agency provided specific expectations on quantity, deliveries, and permits

Understanding RFx Documents

Request for Proposal (RFP)

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

Scenario:

- DPW needs a contract in place for pharmaceuticals
 - Prescription-filling services
 - Generic and name brand options
 - Contract to serve all DPW institutions
- The potential supplier(s) have some flexibility, and can create a customized plan for the Commonwealth to offer the best service, logistics, and price

Understanding RFx Documents

Request for Quote Invitation to Qualify (RFQ ITQ)

A multiple-award contract currently exists; pricing may or may not be associated with the desired item	Supplier on contract submits a price quote and other information for a requisitioned item (not IT-related)	COPA awards based on a variety of criteria and is considered “best value”
--	--	---

Scenario:

- Tree trimming service is required on state game lands in West Moreland County
 - A contract exists with the tree trimmers
 - A quote is needed for the specific amount of service required at that one location

Understanding RFx Documents

Request for Quote IT Invitation to Qualify (RFQ IT-ITQ)

A contract currently exists but no pricing is associated with the desired item	Supplier submits a technical proposal, as well as a price quote, for a requisitioned IT item	COPA awards based on best value
--	--	---------------------------------

Scenario:

- The Master IT Services ITQ streamlines the process of individual agencies initiating procurement of their IT service needs
 - The ITQ process pre-qualifies a supplier
 - One or more suppliers – based on the amount of the procurement – will then be invited to submit a quote to provide services to any of the Commonwealth agencies
- All IT procurements must comply with ITB PRO001

Understanding RFx Documents

- Refer to the Department of General Services Enterprise Invitation to Qualify (ITQ) portal for complete details
- The portal is available via a link on the DGS Procurement's website at www.dgs.state.pa.us/procurement

Understanding RFx Documents

Sole Source Materials*

- The agency requisitions the **material** by:
 1. Creating and ordering the Shopping Cart using the “Describe Requirement” method
 2. Completing the online Source Justification Form
 3. Forwarding the fully approved Shopping Cart to DGS

*refer to Sole Source Material Flowchart Appendix A

Understanding RFx Documents

- After receiving the agency request:
 1. DGS will process the SPR and create the Purchase Order for the Sole Source Board release and approval process
 2. Upon final release by the Board, DGS will update the Source Justification Form with pertinent award information
 3. Upon final approval, DGS will send the Agency an email that the Source Justification Form has been approved
 4. DGS issues the PO to the supplier

Understanding RFx Documents

- For additional information regarding Material requests for Sole/Single Source approvals, please reference the Procurement Handbook, Part II, Chapter 5

Note: Material requests are reviewed by the Sole Source Board and service requests follow a pre-defined workflow.

Understanding RFx Documents

Sole Source Services*

- Shopping carts are used for sole source service requests, but are not forwarded to DGS
 - Agency completes the SPR process and receives a quote from the supplier
 - Agency completes the online Source Justification Form, with attached supplier quote and all other pertinent documentation
 - Upon final approval from DGS, the agency will receive an email that the source justification has been approved
 - The agency may process the Purchase Order document type in SRM utilizing the 'Follow-On Document' functionality of the SPR once the document is awarded
- For more information regarding Service requests for Sole/Single Source approvals, please reference the Procurement Handbook, Part III Chapter 5

*Sole Source Service Flowchart Appendix B

Understanding RFx Documents

Public and Restricted Solicitations

- Public
 - Any registered supplier can respond
- Restricted
 - Only those suppliers on contract can respond
 - This type is commonly used for RFQs to ensure that responses are received only from those suppliers already on contract

Understanding RFx Documents

Paper or Electronic Submissions?

- When creating a solicitation, the submission method – either paper or electronic – must be selected and entered into both SRM and Document Builder
- Electronic submissions should be the **primary** method of doing business
 - Whatever method is chosen must be used by **all** responders
 - Deviating from the prescribed method will result in the responder's bid being considered non-responsive

Sourcing Requisitions

Sourcing Requisitions

Overview of Carry Out Sourcing

- The functionality of Carry Out Sourcing in SRM 7.0 is to:
 - Locate line item requirements for the purpose of identifying a supplier to provide the material and/or services, and
 - Issue a Purchase Order or Contract to the supplier

Sourcing Requisitions

Carry Out Sourcing

In SRM 7.0, the Carry Out Sourcing function consists of a four-step wizard:

1. Select Requisition

- Perform a search for shopping cart requisition(s) matching the identified criteria
- Select applicable requisition(s) for processing

2. Assign Source of Supply

- Assign the appropriate supplier to the requisition(s)
- Create a draft procurement document(s) (e.g., RFx, Contract, Purchase Order)

Sourcing Requisitions

Carry Out Sourcing

3. Review Draft

- Review and process selected procurement document draft(s)

4. Summary Screen

- Display the newly created procurement document(s)
- Make edits if necessary

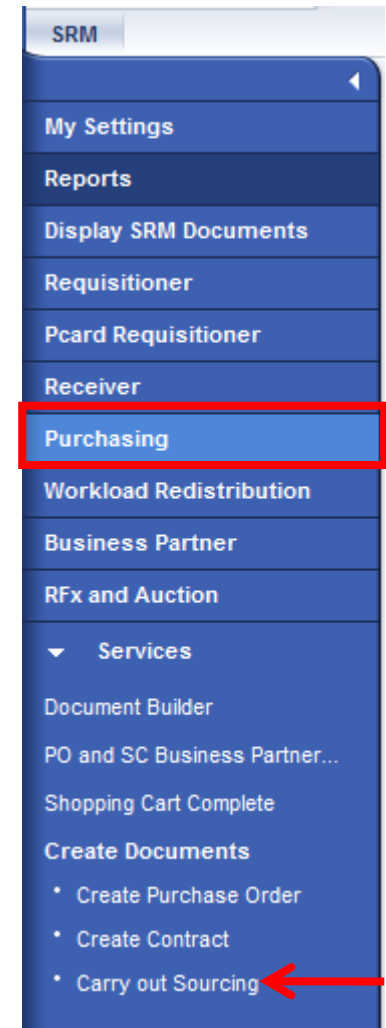
Sourcing Requisitions

Accessing the Sourcing Wizard

- Select **Purchasing**

Left navigation pane under – Create Documents

- Select **Carry Out Sourcing**

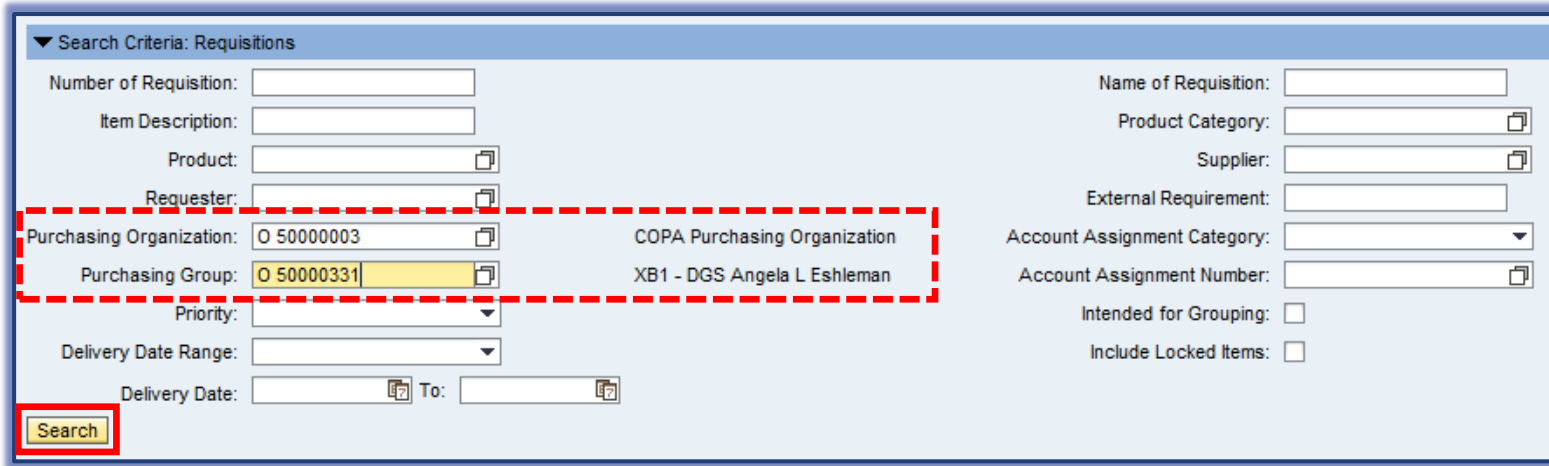


[illegible]

- The wizard displays on Step 1
- The *Search Criteria: Requisitions* area provides a wide range of entry fields

Sourcing Requisitions

Step 1 (Select Requisition)



▼ Search Criteria: Requisitions

Number of Requisition:

Item Description:

Product:

Requester:

Purchasing Organization: COPA Purchasing Organization

Purchasing Group: XB1 - DGS Angela L Eshleman

Priority:

Delivery Date Range:

Delivery Date: To:

Name of Requisition:

Product Category:

Supplier:

External Requirement:

Account Assignment Category:

Account Assignment Number:

Intended for Grouping: ☐

Include Locked Items: ☐

Search

- Enter your Purchasing Organization and Purchasing Group
 - To find all assignments for your organization and group, leave other search fields blank
- Select the SEARCH button
- Items matching your selection criteria will display

Sourcing Requisitions

Step 1 (Select Requisition)

Delivery Date Range: To:


Include Locked Items: ☐

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supp
• 10011784/1	EMS ALS Medical Cases	42171912		75.000	EA	Angela Eshleman	10/02/2013		
▪ 10011784/2	Rescue Blankets	42171701		225.000	EA	Angela Eshleman	10/02/2013		
▪ 10011784/3	Emergency Stretcher	42171611		150.000	EA	Angela Eshleman	10/02/2013		
▪ 10011784/4	Emergency Hospital Services	85101501		80.000	H	Angela Eshleman	10/02/2013		
▪ 10011785/1	BEDSHEET,FITTED,PERCALE,WHT,35X80X6	42132105		1,250.000	EA	Angela Eshleman	10/02/2013		
▪ 10011785/2	BEDSHEET,PERCALE,WHT,54X90	42132105		1,250.000	EA	Angela Eshleman	10/02/2013		
▪ 10011785/3	BEDSPREAD TREVIRA POLY CLRS 72X108	42132106		750.000	EA	Angela Eshleman	10/02/2013		

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

Sourcing Requisitions

Step 1 (Select Requisition)

<div> Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items </div>									
	Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier
	▪ 10011784/1	EMS ALS Medical Cases	42171912		75.000	EA	Angela Eshleman	10/02/2013	
	▪ 10011784/2	Rescue Blankets	42171701		225.000	EA	Angela Eshleman	10/02/2013	
	▪ 10011784/3	Emergency Stretcher	42171611		150.000	EA	Angela Eshleman	10/02/2013	
	▪ 10011784/4	Emergency Hospital Services	85101501		80.000	H	Angela Eshleman	10/02/2013	
	▪ 10011785/1	BEDSHEET,FITTED,PERCALE,WHT,35X80X6	42132105		1,250.000	EA	Angela Eshleman	10/02/2013	
	▪ 10011785/2	BEDSHEET,PERCALE,WHT,54X90	42132105		1,250.000	EA	Angela Eshleman	10/02/2013	
	▪ 10011785/3	BEDSPREAD,TREVIRA POLY,CLRS,72X108	42132106		750.000	EA	Angela Eshleman	10/02/2013	

- To begin processing a requirement immediately, select the *gray* block to the left to highlight it
- Note the indicator in the upper left corner of the table, which signifies that multiple rows may be selected
 - When selected, a dropdown will display giving options to Select All or Deselect All

Sourcing Requisitions

Step 1 (Select Requisition)

<div> Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items </div>									
<input type="checkbox"/>	Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier
<input type="checkbox"/>	▪ 10011784/1	EMS ALS Medical Cases	42171912		75.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ 10011784/2	Rescue Blankets	42171701		225.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ 10011784/3	Emergency Stretcher	42171611		150.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ 10011784/4	Emergency Hospital Services	85101501		80.000	H	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ 10011785/1	BEDSHEET,FITTED,PERCALE,WHT,35X80X6	42132105		1,250.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ 10011785/2	BEDSHEET,PERCALE,WHT,54X90	42132105		1,250.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>	▪ 10011785/3	BEDSPREAD,TREVIRA POLY,CLRS,72X108	42132106		750.000	EA	Angela Eshleman	10/02/2013	
<input type="checkbox"/>									

- To select **all** rows in the table, use the SELECT ALL button
- To select **multiple** rows, press and hold down the *Shift* key, then choose the row(s)
 - Note: The first row you select is highlighted differently
- To deselect a row, press and hold down the Ctrl key, then choose the row

Sourcing Requisitions

Step 1 (Select Requisition)

Assign Sources of Supply: Step 1 (Select Requisition)

◀ Previous **Next ▶** Close

1 2 3 4

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

▶ Search Criteria: Requisitions

Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items

	Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier
▪	10011784/1	EMS ALS Medical Cases	42171912		75.000	EA	Angela Eshleman	10/02/2013	
▪	10011784/2	Rescue Blankets	42171701		225.000	EA	Angela Eshleman	10/02/2013	
▪	10011784/3	Emergency Stretcher	42171611		150.000	EA	Angela Eshleman	10/02/2013	
▪	10011784/4	Emergency Hospital Services	85101501		80.000	H	Angela Eshleman	10/02/2013	
▪	10011785/1	BEDSHEET FITTED PERCALE WHT 35X80X6	42132105		1 250.000	EA	Angela Eshleman	10/02/2013	

- Select the NEXT button to proceed to Step 2

Sourcing Requisitions

Step 2 (Assign Source of Supply)

Assign Sources of Supply: Step 2 (Assign Sources of Supply (4 Items))

◀ Previous Next ▶ Save Close ?

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

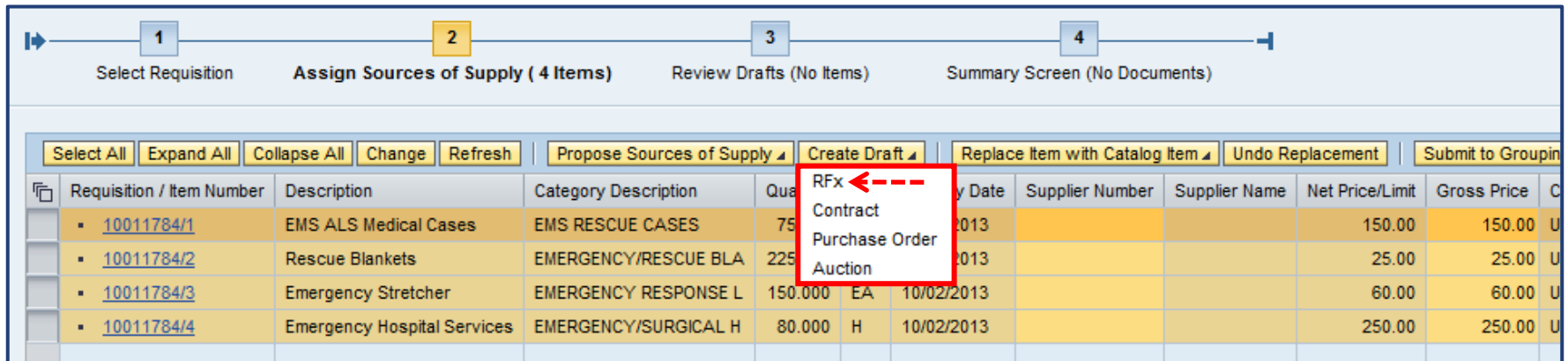
Select All Expand All Collapse All Change Refresh Propose Sources of Supply Create Draft Replace Item with Catalog Item Undo Replacement Submit to Grouping Remove

	Requisition / Item Number	Description	Category Description	Quantity	Unit	Delivery Date	Supplier Number	Supplier Name	Net Price/Limit	Gross Price	Currency	Net Value
<input type="checkbox"/>	▪ 10011784/1	EMS ALS Medical Cases	EMS RESCUE CASES	75.000	EA	10/02/2013			150.00	150.00	USD	11,250
<input type="checkbox"/>	▪ 10011784/2	Rescue Blankets	EMERGENCY/RESCUE BLA	225.000	EA	10/02/2013			25.00	25.00	USD	5,625
<input type="checkbox"/>	▪ 10011784/3	Emergency Stretcher	EMERGENCY RESPONSE L	150.000	EA	10/02/2013			60.00	60.00	USD	9,000
<input type="checkbox"/>	▪ 10011784/4	Emergency Hospital Services	EMERGENCY/SURGICAL H	80.000	H	10/02/2013			250.00	250.00	USD	20,000

- There are several processing options in this step
 - Select the applicable line item(s)
 - Choose the appropriate command button

Sourcing Requisitions

Step 2 (Assign Source of Supply)



1 Select Requisition 2 Assign Sources of Supply (4 Items) 3 Review Drafts (No Items) 4 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 Submit to Grouping

Requisition / Item Number	Description	Category Description	Quantity	Unit	Effective Date	Supplier Number	Supplier Name	Net Price/Limit	Gross Price	Comments
10011784/1	EMS ALS Medical Cases	EMS RESCUE CASES	75		10/02/2013			150.00	150.00	U
10011784/2	Rescue Blankets	EMERGENCY/RESCUE BLA	225		10/02/2013			25.00	25.00	U
10011784/3	Emergency Stretcher	EMERGENCY RESPONSE L	150.000	EA	10/02/2013			60.00	60.00	U
10011784/4	Emergency Hospital Services	EMERGENCY/SURGICAL H	80.000	H	10/02/2013			250.00	250.00	U

- SRM 7.0 uses the term *Create Draft* when referring to the initial transfer of requisition items into a procurement document
 - All procurement document types may be generated at this step (e.g. RFx, Contract, Purchase Order)
- To create a solicitation document:
 - Select the applicable line item(s)
 - Select the CREATE DRAFT button and choose *RFx*

Sourcing Requisitions

Step 3 (Review Drafts)

Assign Sources of Supply: Step 3 (Review Drafts (4 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 (4 Items)** 4 Summary Screen (No Documents)

▼ Created Drafts

[Change Selected Draft To](#)
[Remove](#)
[Settings](#)

Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
P00068292 08/08/2013 15:05:22	Bid Invitation			

Details of Selected Drafts P00068292 08/08/2013 15:05:22

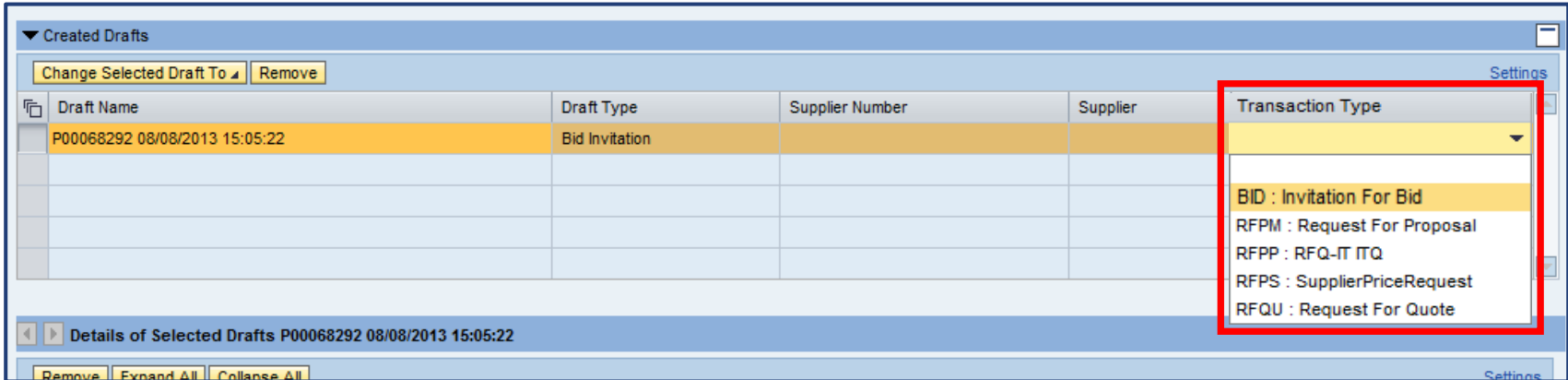
[Remove](#)
[Expand All](#)
[Collapse All](#)
[Settings](#)

Requisition / Item Number	Configurable Item Number	Description	Category	Quantity	Unit	Info Record	Net Price	Gross Price	Currency
10011784 / 1		EMS ALS Medical Cases	42171912	75.000	EA		150.00	150.00	USD
10011784 / 2		Rescue Blankets	42171701	225.000	EA		25.00	25.00	USD
10011784 / 3		Emergency Stretcher	42171611	150.000	EA		60.00	60.00	USD
10011784 / 4		Emergency Hospital Services	85101501	80.000	H		250.00	250.00	USD

- Review and process the selected draft solicitation document

Sourcing Requisitions

Step 3 (Review Drafts)



▼ Created Drafts

Change Selected Draft To ▾ Remove

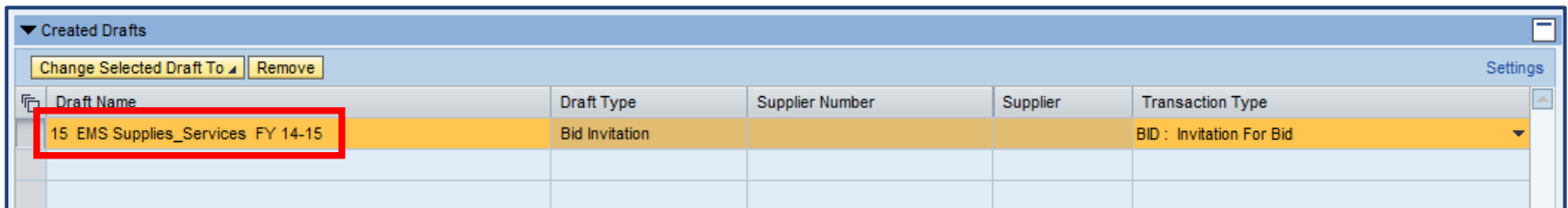
Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
P00068292 08/08/2013 15:05:22	Bid Invitation			BID : Invitation For Bid

Details of Selected Drafts P00068292 08/08/2013 15:05:22

Remove Expand All Collapse All

Settings

- Select the applicable *Transaction Type* for the document



▼ Created Drafts

Change Selected Draft To ▾ Remove

Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
15 EMS Supplies_Services FY 14-15	Bid Invitation			BID : Invitation For Bid

Settings

- Edit the defaulted name of the solicitation

Sourcing Requisitions

Step 3 (Review Drafts)

▼ Created Drafts

Change Selected Draft To ▾
Remove

RFx
Contract
Purchase Order
Auction

	Draft Type	Supplier Number	Supplier	Transaction Type
Services FY 14-15	Bid Invitation			BID : Invitation For Bid ▾

Details of Selected Drafts P00068292 08/08/2013 15:05:22

Remove
Expand All
Collapse All

Requisition / Item Number	Configurable Item Number	Description	Category	Quantity	Unit	Info Record	Net Price	Gross Price	Currency
▪ 10011784 / 1		EMS ALS Medical Cases	42171912	75.000	EA		150.00	150.00	USD
▪ 10011784 / 2		Rescue Blankets	42171701	225.000	EA		25.00	25.00	USD
▪ 10011784 / 3		Emergency Stretcher	42171611	150.000	EA		60.00	60.00	USD
▪ 10011784 / 4		Emergency Hospital Services	85101501	80.000	H		250.00	250.00	USD

- If necessary:
 - Change the selected draft to another document type
 - Remove the draft document
 - Remove any of the previously selected line items from the draft document

Sourcing Requisitions

Step 3 (Review Drafts)

Assign Sources of Supply: Step 3 (Review Drafts (4 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 (4 Items) 4 Summary Screen (No Documents)

▼ Created Drafts

[Change Selected Draft To](#)
[Remove](#)

Draft Name	Draft Type	Supplier Number	Supplier	Transact
15 EMS Supplies_Services FY 14-15	Bid Invitation			RFQU : Re

- Choose the EDIT SELECTED DRAFTS button to continue
- Important note: Do not use the **PROCESS ALL DRAFTS** or **PROCESS SELECTED DRAFTS** buttons due to potential approval workflow issues

Sourcing Requisitions

Step 4 (Summary Screen)

Summary Screen: Step 4 (Summary Screen 1 Documents)

◀ Previous Next ▶ Refresh Close

1 2 3 4

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

Created Objects

Settings

Document Number	Document Type	Description	Status	Supplier Number	Supplier Name	Total Value	Currency
6100004504	RFx	15 EMS Supplies_Services FY 14-15	Saved			0.00	

- The Summary Screen displays the newly created procurement document(s)
- Note that a secondary window opens simultaneously with the Summary Screen
 - It contains the draft version of the procurement document, available for editing

Editing a Draft RFx

Editing a Draft RFx

- Review your RFx
 - Verify that all of the data from the requisition line item(s) is complete and accurate
 - If applicable, make any edits to the information
- On each tab, enter any necessary data into the appropriate fields, and/or attach documents
- Access Document Builder to generate the Terms and Conditions (T&Cs)
- Publish the RFx

Editing a Draft RFx

Edit RFx :

[Publish](#) [Check](#) [Save](#) [Print Preview](#) [Close](#) [Related Links](#) [Read Only](#)

1 Submission deadline for bids 01/02/2014 at 00:00:00 is in the past
 1 Opening date 01/02/2014 is in the past
 1 Start date is in the past
 1 Submission deadline must be later than the start date
 1 Mandatory Attributes Not Maintained

RFx Number: 0100027171 Smart Number: CKA RFx Demo 1-2-14 Type: Invitation For Bid Status: Seved Created On: 01/02/2014 11:19:36 Created By: Cynthia Anderson Time Zone: EST
 Number of Suppliers: 0 Number of Items: 3 Version Number: Version Type: Active Version External Version Number:

[RFx Information](#) [Bidders](#) [Items](#) [Notes and Attachments](#) [Conditions](#) [Approval](#) [Tracking](#)

[RFx Parameters](#) [Questions](#) [Notes and Attachments](#) [Conditions](#)

Identification:
 Smart Number: CKA RFx Demo 1-2-14
☐ Smart Number is External
 RFx Type: Invitation For Bid
 Bid Description: CKA RFx Demo 1-1-14
 Publication Type: Public RFx

Event Parameters:
 Detailed Price Information: Price with Conditions
 Follow-On Document: Contract
 Bidder Can Change RFx Responses: ☒
 Allow Multiple RFx Responses for Each Company: ☐
 Scenario Award/Contract:

Organization:
 Purchasing Organization: COFA Purchasing Organization
 Purchasing Group: DGS Central Purchase Purchasing Group [Show Members](#)

Dates:
 Start Date: 01/02/2014 00:00:00
 Submission Deadline: 01/02/2014 00:00:00
 Opening Date: 01/02/2014 00:00:00

Change does NOT require approval ☐

Partners and Delivery Information

[Details](#) [Add](#) [Send E-Mail](#) [Call](#) [Clear](#)

Function	Number	Name	Phone Number
+ Requester	703389	Cynthia Anderson	
+ Goods Recipient	703389	Cynthia Anderson	
+ Responsible Employee			
+ Ship-To Address	1	EXFC BRANCH	717-787-4719
+ Location	301375	DGS Bureau of Procurement	717-787-2199

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

Editing a Draft RFx

- The **Start Date** is the earliest *date and time* the suppliers can access the solicitation
 - When creating the solicitation document, allow enough time before the Start Date for the approval process
 - If the solicitation is approved prior to the Start Date, suppliers may see the solicitation on the PA Supplier Portal, but will not be able to open it
- The **Submission Deadline** is the latest *date and time* the suppliers can submit a solicitation
 - This is not the latest date and time the suppliers can access the solicitation – it is the latest they can submit a response

Editing a Draft RFX

- The **Opening Date** is the *date and time* the responses will be opened
 - This is not the date and time the solicitation is opened for allowing responses – it is the date the responses are opened

Editing a Draft RFx

RFx Parameters

RFx Information | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

RFx Parameters | Questions | Notes and Attachments | Conditions

Identification

Smart Number:
☐ Smart Number is External

RFx Type:

Bid Description:

Publication Type:

Event Parameters

Detailed Price Information:

Follow-On Document:

Bidder Can Change RFx Responses: ☒

Allow Multiple RFx Responses for Each Company: ☐

Scenario Award/Contract

Organization

Purchasing Organization:

Purchasing Group: [Show Members](#)

Dates

Start Date:

Submission Deadline:

Opening Date:

Change does NOT require approval: ☐

Partners and Delivery Information

[Details](#) [Add](#) [Send E-Mail](#) [Call](#) [Clear](#) [Filter Settings](#)

Function	Number	Name	Phone Number
Requester	703389	Cynthia Anderson	
Goods Recipient	703389	Cynthia Anderson	
Responsible Employee			
Ship-To Address	1	EXEC BRANCH	717-787-4719
Location	301375	DGS Bureau of Procurement	717-787-2199

- The RFX Information tab, RFx Parameters sub-tab contains various elements of the solicitation, which we will discuss into further detail in the following slides.

Editing a Draft RFx

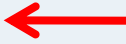
Identification

Smart Number:

☐ Smart Number is External

RFx Type:

Bid Description:

Publication Type: 

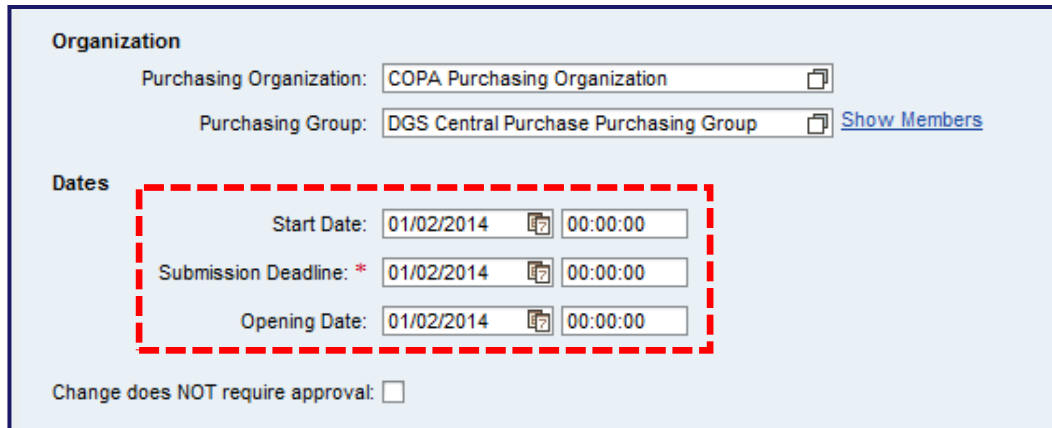
- Enter a name for the bid in the Bid Description field
- Select the Publication Type
 - Public
 - Restricted

Editing a Draft RFx

Naming Your Document

- There is a 40-character limit on the document's name
 - Characters include letters, punctuation, and spaces
- The name must include:
 - 4-digit UNSPSC code (ref: www.unspsc.org)
 - Space or Dash
 - Noun that describes the item or Contract Title (no abbreviations)
- Example:
 - 2517 Radial Tires

Editing a Draft RFx



Organization

Purchasing Organization:

Purchasing Group: [Show Members](#)

Dates

Start Date:

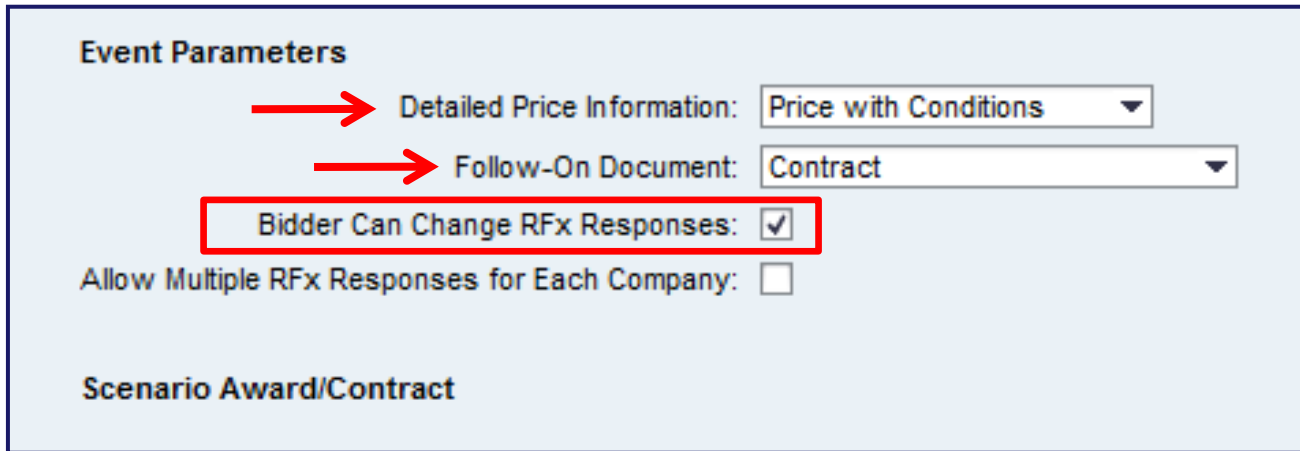
Submission Deadline: *

Opening Date:

Change does NOT require approval: ☐

- Start Date, Submission Deadline, and Opening Date must be in the future
 - Enter as HH/MM/SS
 - Enter time on a 24-hour clock
 - 10:30:00 is 10:30 am
 - 17:00:00 is 5:00 pm

Editing a Draft RFx



Event Parameters

→ Detailed Price Information: Price with Conditions ▼

→ Follow-On Document: Contract ▼

Bidder Can Change RFx Responses: ☒

Allow Multiple RFx Responses for Each Company: ☐

Scenario Award/Contract

- Always select Price with Conditions from the dropdown menu in the Detailed Price Information field
- Select either Contract or Purchase Order from the Dropdown menu in the Follow-On Document field. Do **not** select the Contract or Purchase option.
- Always select the Bidder Can Change RFx Responses checkbox to indicate that a responder may change a submission up to the solicitation's Submission Deadline
- Do **not** select the Allow Multiple RFx Responses for Each Company, as COPA only permits one bid per supplier

Editing a Draft RFx

▼ Partners and Delivery Information

Details Add Send E-Mail Call Clear

Function	Number	Name
▪ Requester	703389	Cynthia Anderson
▪ Goods Recipient	703389	Cynthia Anderson
▪ Responsible Employee	703389	Cynthia Anderson
▪ Ship-To Address	1	EXEC BRANCH
▪ Location	301375	DGS Bureau of Procurement

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

Editing a Draft RFx

Responsible Employee

- The Responsible Employee field is used, among other things, to determine who can view submissions to an RFP and who can view a contract
- The only authorized viewers will be:
 - The creator of the document
 - Designee specified by creator to view the documents in the case of an anticipated absence

Editing a Draft RFx

Responsible Employee User Address

- Purchaser must keep their “company” addresses updated in SRM/SAP (SU3)*
 - SRM populates the Purchaser’s contact and address information into the Bid Invitation output form
 - The Responsible Employee’s partner number may be entered, or a search can be performed

*SU3 Appendix C

Editing a Draft RFx

Questions



Field Name	Question	Type	Unit	Currency	To Be Weighted	Required	Multi-Select	Comment	Sequence
QUESTION #02	Is the offer in accordance with the "Representations and Authorizations" listed in section "Submission - 001.1" of the attached solicitation document?	CoPA yes or no flag			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0010
QUESTION #01	Has the submitter read, and does the submitter understand, the "Representations and Authorizations" listed in section "Submission - 001.1" of the attached solicitation document?	CoPA yes or no flag			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0025

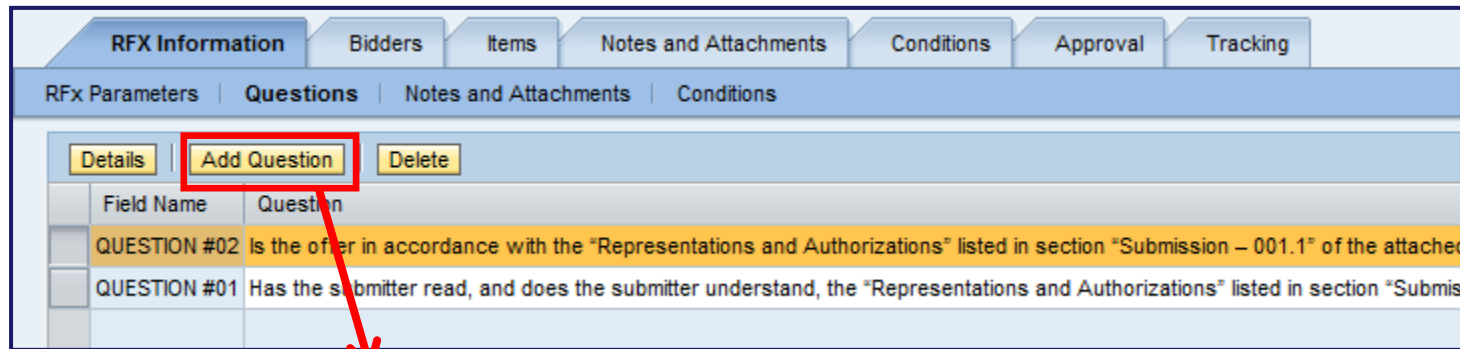
If available, below you can select fields which can be weighted in addition to header questions. The available fields depend on default settings.

Default Header Fields	To Be Weighted
Field	

- The mandatory Questions default into the solicitation, and therefore do not need to be added manually
 - Selecting the sub-tab activates the questions and will remove any error messages

Editing a Draft RFx

Questions

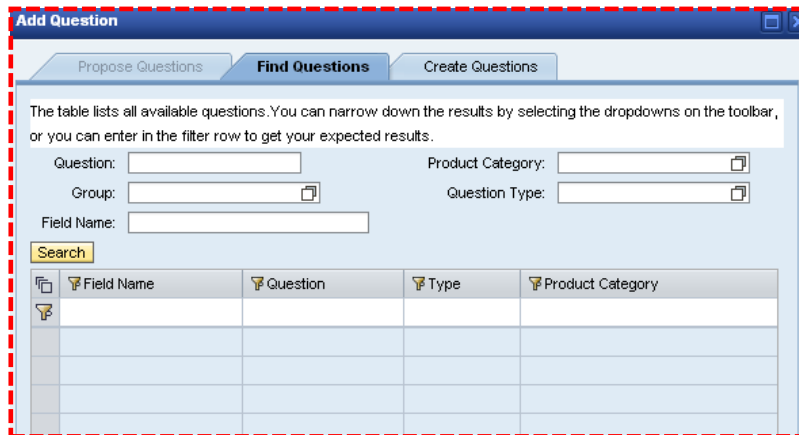


RFx Information | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

RFx Parameters | **Questions** | Notes and Attachments | Conditions

Details | **Add Question** | Delete

Field Name	Question
QUESTION #02	Is the offer in accordance with the "Representations and Authorizations" listed in section "Submission – 001.1" of the attached
QUESTION #01	Has the submitter read, and does the submitter understand, the "Representations and Authorizations" listed in section "Submis



Add Question

Propose Questions | **Find Questions** | Create Questions

The table lists all available questions. You can narrow down the results by selecting the dropdowns on the toolbar, or you can enter in the filter row to get your expected results.

Question: Product Category:

Group: Question Type:

Field Name:

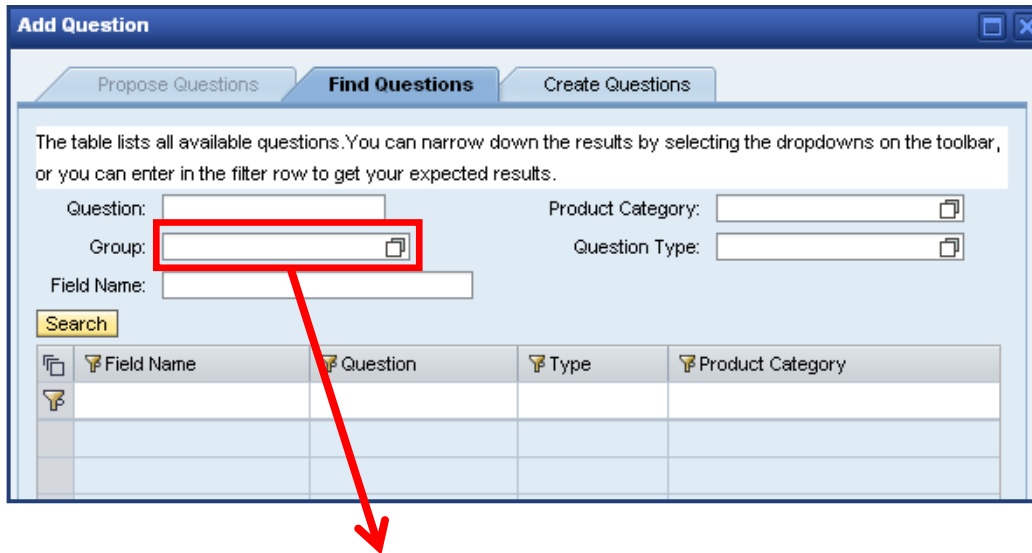
Search

Field Name	Question	Type	Product Category

- Optional Questions may be added by selecting the ADD QUESTION button (DGS/BOP functionality)

Editing a Draft RFx

Questions



Add Question

Propose Questions **Find Questions** Create Questions

The table lists all available questions. You can narrow down the results by selecting the dropdowns on the toolbar, or you can enter in the filter row to get your expected results.

Question: Product Category:

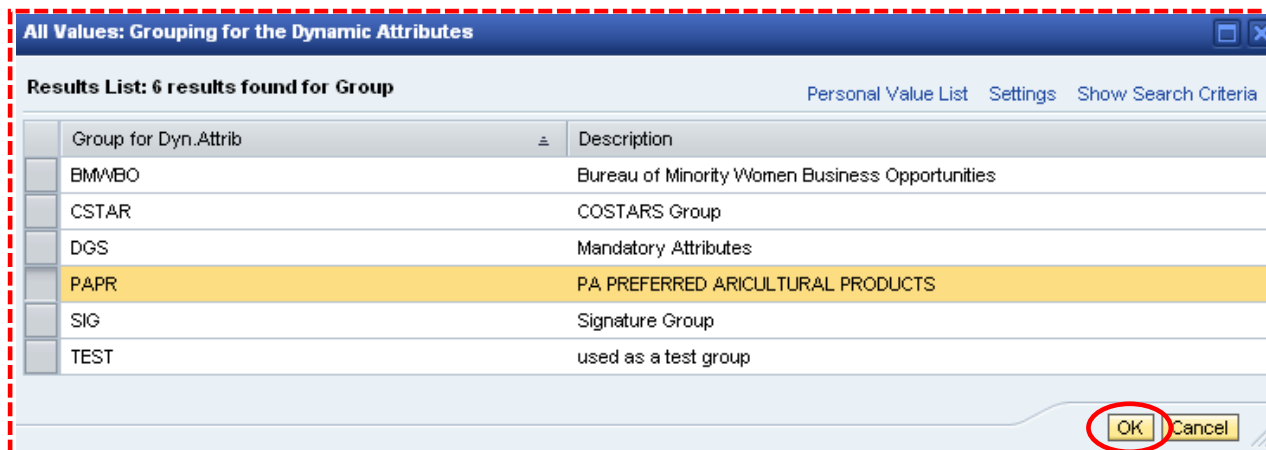
Group: Question Type:

Field Name:

Field Name	Question	Type	Product Category

- To view the optional Questions, select the match code next to the *Group* field

- Choose the Question to be added



All Values: Grouping for the Dynamic Attributes

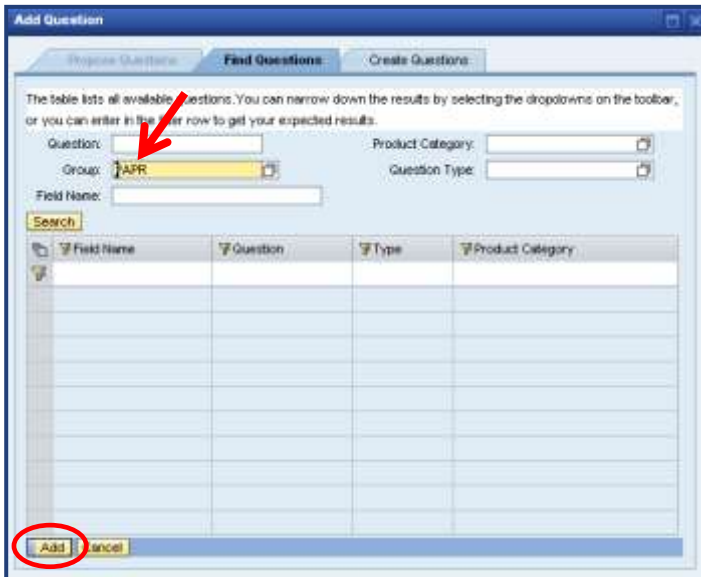
Results List: 6 results found for Group [Personal Value List](#) [Settings](#) [Show Search Criteria](#)

Group for Dyn.Attrib	Description
BMVBO	Bureau of Minority Women Business Opportunities
CSTAR	COSTARS Group
DGS	Mandatory Attributes
PAPR	PA PREFERRED AGRICULTURAL PRODUCTS
SIG	Signature Group
TEST	used as a test group

- Select the OK button

Editing a Draft RFx

Questions



The table lists all available questions. You can narrow down the results by selecting the dropdowns on the toolbar, or you can enter in the text box to get your expected results.

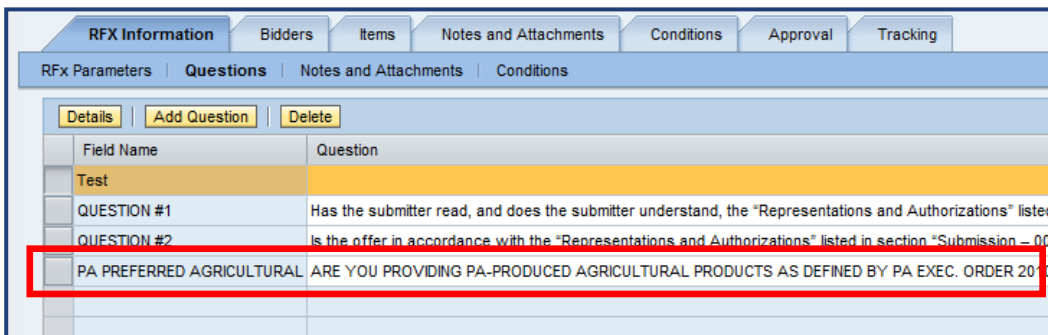
Question: Product Category:

Group: **APR** Question Type:

Field Name:

Field Name	Question	Type	Product Category

- The selected Question is pulled into the *Group* field
 - Select the ADD button



RFX Information | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

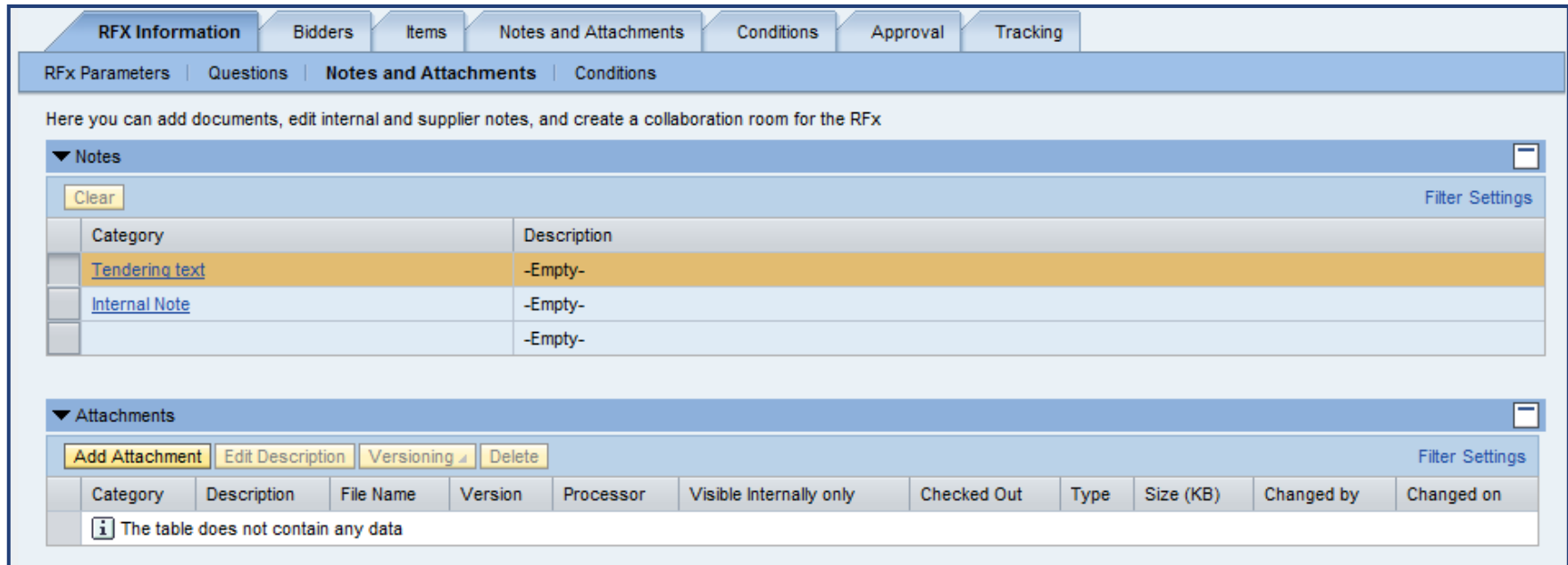
RFX Parameters | Questions | Notes and Attachments | Conditions

Field Name	Question
Test	
QUESTION #1	Has the submitter read, and does the submitter understand, the "Representations and Authorizations" listed
QUESTION #2	Is the offer in accordance with the "Representations and Authorizations" listed in section "Submission - 001
PA PREFERRED AGRICULTURAL	ARE YOU PROVIDING PA-PRODUCED AGRICULTURAL PRODUCTS AS DEFINED BY PA EXEC. ORDER 2010-4

- The selected Question is included on the tab

Editing a Draft RFx

Notes and Attachments



RFX Information | Bidders | Items | **Notes and Attachments** | Conditions | Approval | Tracking

RFX Parameters | Questions | **Notes and Attachments** | Conditions

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes Filter Settings

[Clear](#)

Category	Description
Tendering text	-Empty-
Internal Note	-Empty-
	-Empty-

▼ Attachments Filter Settings

[Add Attachment](#) [Edit Description](#) [Versioning](#) [Delete](#)

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
i The table does not contain any data										

- The RFX Information tab, Notes and Attachments sub-tab is used to display text and attachments
 - Select the link for the type of text to be entered
 - Tendering Text is visible to the supplier
 - Internal Note is visible only to COPA employees

Editing a Draft RFx

Notes and Attachments

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes

Clear Filter Settings

Category	Description
Tendering text	-Empty-
Internal Note	-Empty-
	-Empty-

▼ Attachments

Add Attachment Edit Description Versioning Delete Filter Settings

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	EMERGENCY HOSPITAL SERVICES REQUIREMENTS	Emergency Hospital Services Requirements.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	EMS ALS MEDICAL CASE SPECIFICATIONS	EMS ALS Medical Case Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	EMS EMERGENCY STRETCHER SPECIFICATIONS	EMS Emergency Stretcher Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	EMS RESCUE BLANKET SPECIFICATIONS	EMS Rescue Blanket Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013

Add Tendering text

Tendering text:

The Commonwealth of PA is seeking certain Emergency Medical Supplies and Services for the period July 1, 2014 through June 30, 2015. We have estimated the quantities needed during the aforementioned timeframe based upon prior purchases. Reference the attachments to this RFx for product specifications and hospital service requirements. Please ensure that the information contained in your bid response is complete, specific and accurate. The Commodity Specialist for this RFx is Jane Smith at 717-214-1111.

OK Cancel

- To add a Note, select the applicable category
 - Type or paste the text into the box and select the OK button

Editing a Draft RFx

Notes and Attachments

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes

Clear

Filter Settings

Category	Description
Tendering text	The Commonwealth of PA is seeking certain Emergency Medi...
Internal Note	-Empty-
	-Empty-

▼ Attachments

Add Attachment Edit Description Versioning Delete

Filter Settings

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	EMERGENCY HOSPITAL SERVICES REQUIREMENTS	Emergency Hospital Services Requirements.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	EMS ALS MEDICAL CASE SPECIFICATIONS	EMS ALS Medical Case Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	EMS EMERGENCY STRETCHER SPECIFICATIONS	EMS Emergency Stretcher Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Standard Attachment	EMS RESCUE BLANKET SPECIFICATIONS	EMS Rescue Blanket Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013

- Repeat the process to add an Internal Note
- If applicable, utilize the CLEAR button to delete an existing note

Editing a Draft RFx

Notes and Attachments

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes Filter Settings

[Clear](#)

Category	Description
Tendering text	-Empty-
Internal Note	-Empty-
	-Empty-

▼ Attachments Filter Settings

[Add Attachment](#) [Edit Description](#) [Versioning](#) [Delete](#)

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
The table does not contain any data										

Add Attachment

Here, you can upload a file and attach it to the header

File: [Browse...](#)

Description:

Visible Internally only: ☒

[OK](#) [Cancel](#)

- Select the ADD ATTACHMENTS button to browse for the document
 - Attach the document by selecting the OK button

Note: Do not use any "special characters" in the title of the document that is being attached (i.e., #, \$, &, etc.)

Editing a Draft RFx

Notes and Attachments

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes

Clear

Filter Settings

Category	Description
Tendering text	-Empty-
Internal Note	-Empty-
	-Empty-

▼ Attachments

Add Attachment

Edit Description

Versioning

Delete

Filter Settings

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	EMERGENCY HOSPITAL SERVICES REQUIREMENTS	Emergency Hospital Services Requirements.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013

- Following the attachment of a document, an overview of the attachments area will display
 - Mark documents as “Visible Internally Only”, preventing them from posting to the supplier portal
 - If applicable, utilize available functions to EDIT DESCRIPTION of a document or DELETE a document
 - Repeat the ADD ATTACHMENT process to continue adding attachments

Editing a Draft RFx

Notes and Attachments

▼ Attachments

[Add Attachment](#) [Edit Description](#) [Versioning](#) [Delete](#)

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type
Standard Attachment	EMERGENCY HOSPITAL SERVICES REQUIREMENTS	Emergency Hospital Services Requirements.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	doc

- Do not use the VERSIONING option in the Attachment section
 - If edits to an attachment are required, delete the current version and replace it with the revised version

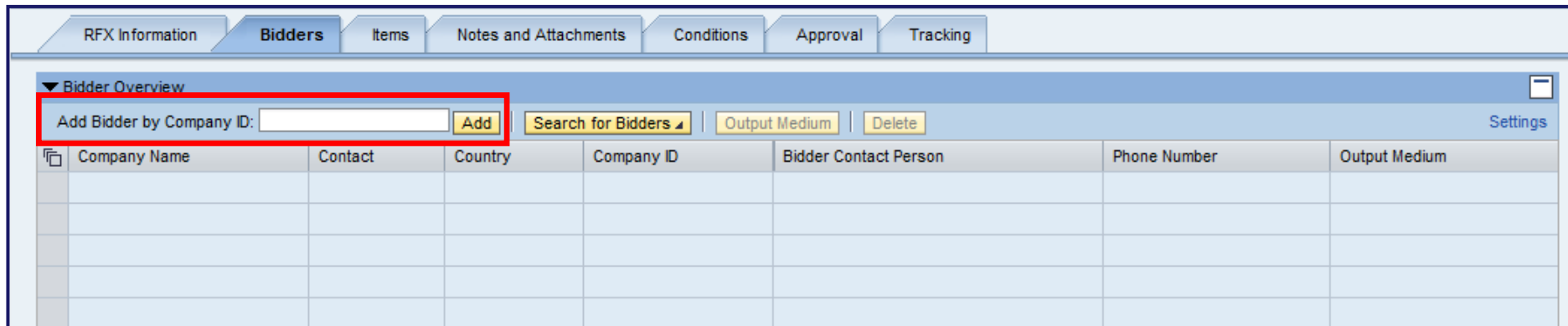
Editing a Draft RFx

- **Bidders**

- On restricted bid invitations, the solicitation is available only to those suppliers who are identified
- On public bid invitations, any registered supplier with an interest in a particular solicitation posted in the portal may submit a bid response

Editing a Draft RFx

Bidders



RFx Information **Bidders** Items Notes and Attachments Conditions Approval Tracking

▼ Bidder Overview

Add Bidder by Company ID: [Settings](#)

Company Name	Contact	Country	Company ID	Bidder Contact Person	Phone Number	Output Medium

- A minimum of one bidder must be entered on the Bidder tab in order to satisfy SRM system requirements
- Enter the appropriate supplier number in the Add Bidder by Company ID field, and select the ADD button
 - *Note: The Public Advertising Supplier ID is 815901*

Editing a Draft RFx

Bidders

RFx Information **Bidders** Items Notes and Attachments Conditions Approval Tracking

▼ Bidder Overview

Add Bidder by Company ID: [Settings](#)

Company Name	Contact	Company ID	Bidder Contact Person	Phone Number	Output Medium
MULTI-AWARD PARENT	Multi_Award Parent	305974	305981		Mail
SHAMROCK SPECIALTY SERVICES	Shamrock11 Shamrock11	210251	306102	1231231233	Mail
SECCO	Secco11 Secco11	210192	306047	1231231233	Mail
EDWIN L HEIM CO	EDWIN11 EDWIN11	210187	306026	1231231233	Mail
PENNSYLVANIA INDUSTRIES FOR THE	PIBH Bidder	210249	306096	717-214-6627	Mail

- If the supplier number is not known, it can be located by selecting the SEARCH FOR BIDDERS button
 - Choose the “From Internal Directory” option
 - Do NOT use the “Supplier Directory” option as it is not functional

Editing a Draft RFx

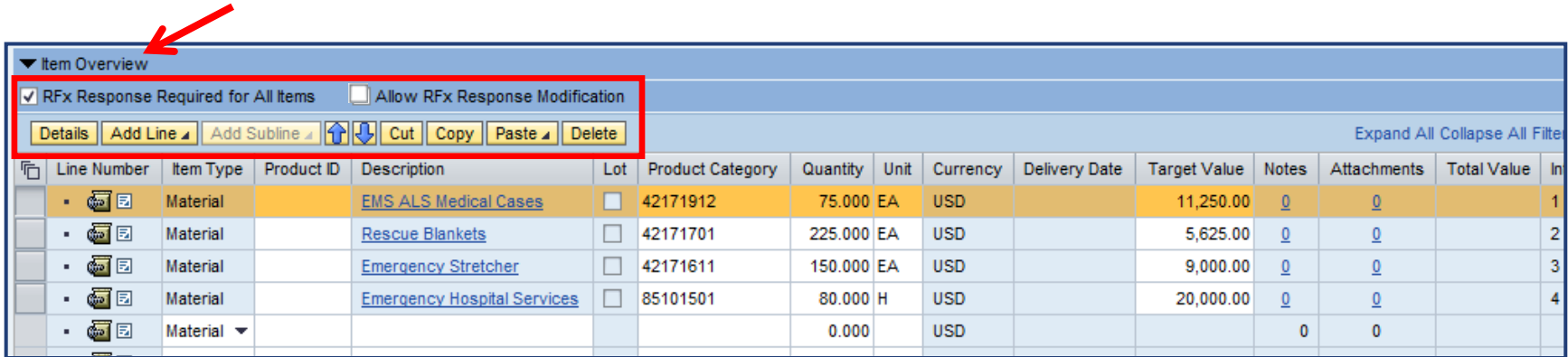
Items

RFx Information Bidders Items Notes and Attachments Conditions Approval Tracking														
▼ Item Overview														
<input checked="" type="checkbox"/> RFx Response Required for All Items <input type="checkbox"/> Allow RFx Response Modification														
Details Add Line Add Subline Cut Copy Paste Delete Expand All Collapse All Filter Settings Hide Outline														
Line Number	Item Type	Product ID	Description	Lot	Product Category	Quantity	Unit	Currency	Delivery Date	Target Value	Notes	Attachments	Total Value	Internal Item Number
1	Material		EMS ALS Medical Cases	<input type="checkbox"/>	42171912	75.000	EA	USD		11,250.00	0	0		1
2	Material		Rescue Blankets	<input type="checkbox"/>	42171701	225.000	EA	USD		5,625.00	0	0		2
3	Material		Emergency Stretcher	<input type="checkbox"/>	42171611	150.000	EA	USD		9,000.00	0	0		3
4	Material		Emergency Hospital Services	<input type="checkbox"/>	85101501	80.000	H	USD		20,000.00	0	0		4
5	Material ▼					0.000		USD			0	0		
6	Material ▼					0.000		USD			0	0		
7	Material ▼					0.000		USD			0	0		
8	Material ▼					0.000		USD			0	0		
9	Material ▼					0.000		USD			0	0		
10	Material ▼					0.000		USD			0	0		

- The information on the Items tab should be reviewed for completeness and accuracy
 - Field entry or edits may be made at both the Item Overview and Item Detail level

Editing a Draft RFx

Items



▼ Item Overview

☒ RFx Response Required for All Items ☐ Allow RFx Response Modification

Details Add Line Add Subline Cut Copy Paste Delete

Expand All Collapse All Filter

Line Number	Item Type	Product ID	Description	Lot	Product Category	Quantity	Unit	Currency	Delivery Date	Target Value	Notes	Attachments	Total Value	In
1	Material		EMS ALS Medical Cases		42171912	75.000	EA	USD		11,250.00	0	0		1
2	Material		Rescue Blankets		42171701	225.000	EA	USD		5,625.00	0	0		2
3	Material		Emergency Stretcher		42171611	150.000	EA	USD		9,000.00	0	0		3
4	Material		Emergency Hospital Services		85101501	80.000	H	USD		20,000.00	0	0		4
	Material					0.000		USD			0	0		

- Option to designate *RFx Response Required for All Items* is available at the Item Overview level
- Various action buttons are also present
 - Show Details, Add Line, Cut, move up/down arrows, Copy, Paste, and Delete

Editing a Draft RFx

Items

Item Overview

☒ RFx Response Required for All Items
 ☐ Allow RFx Response Modification

[Details](#)
[Add Line](#)
[Add Subline](#)
[Cut](#)
[Copy](#)
[Paste](#)
[Delete](#)

Expand All Collapse All Filter Settings Hide Outline

Line Number	Item Type	Product ID	Description	Lot	Product Category	Quantity	Unit	Currency	Delivery Date	Target Value	Notes	Attachments	Total Value	Internal Item Number
1	Material		EMS ALS Medical Cases		42171912	75.000	EA	USD		11,250.00	0	0		1
2	Material		Rescue Blankets		42171701	225.000	EA	USD		5,625.00	0	0		2
3	Material		Emergency Stretcher		42171611	150.000	EA	USD		9,000.00	0	0		3
4	Material		Emergency Hospital Services		85101501	80.000	H	USD		20,000.00	0	0		4
	Material					0.000		USD			0	0		

Item : EMS ALS Medical Cases

Item Data

Notes and Attachments

Conditions

Delivery

Identification

Item Type: Material

Product ID:

Description: EMS ALS Medical Cases

Product Category: 42171912 EMS RESCUE CASES

Lot:

Currency: USD

Quantity/Unit: 75.000 EA

Target Value: 11,250.00 USD

Further Properties

Manufacturer Part Number:

External Manufacturer:

Partners and Delivery Information

[Details](#)
[Add](#)
[Send E-Mail](#)
[Call](#)
[Clear](#)

Filter Settings

Function	Number	Name	Phone Number
Requester	337344	Angela Eshleman	
Goods Recipient	337344	Angela Eshleman	
Ship-To Address	300001	EXEC BRANCH	
Location	73	DGS	717-787-5996

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

Editing a Draft RFx

Items

Item : EMS ALS Medical Cases

Item Data | Notes and Attachments | Conditions | Delivery

Identification

Item Type: Material

Product ID:

Description: EMS ALS Medical Cases

Product Category: 42171912 EMS RESCUE CASES

Lot: ☐

Currency: USD

Quantity/Unit: 75.000 EA

Target Value: 11,250.00 USD

Further Properties

Manufacturer Part Number:

External Manufacturer:

Partners and Delivery Information

Details Add Send E-Mail Call Clear Filter Settings

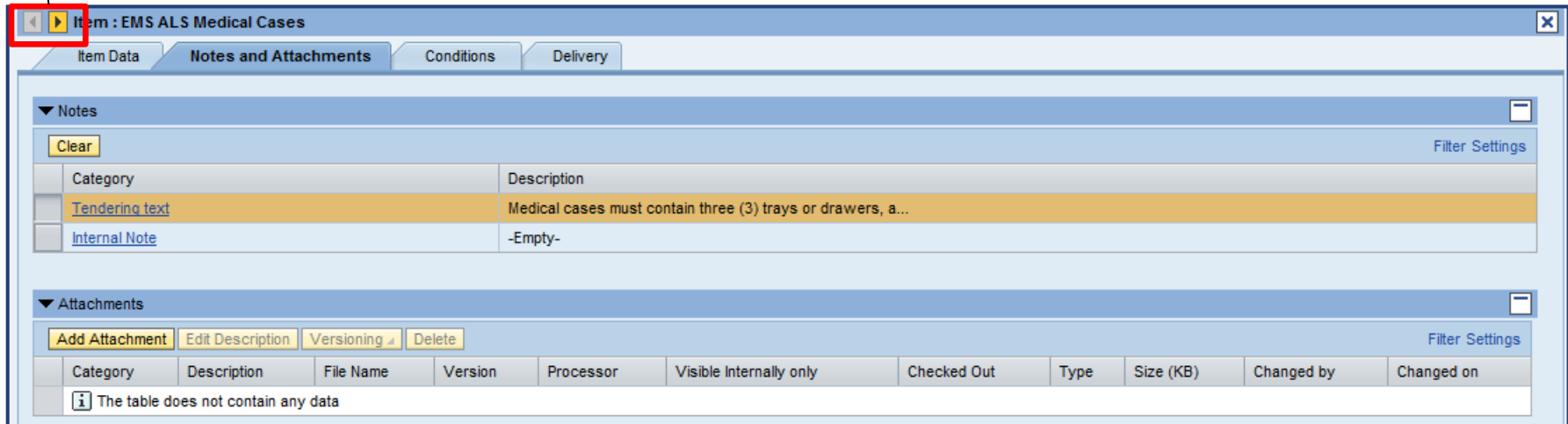
Function	Number	Name	Phone Number
Requester	337344	Angela Eshleman	
Goods Recipient	337344	Angela Eshleman	
Ship-To Address	300001	EXEC BRANCH	
Location	73	DGS	717-787-5996

- The line item's Item Data tab contains the Description, Product Category, Quantity, Unit of Measure, Target Value, and Partner and Delivery information

Editing a Draft RFx

Items

- Select the navigation arrows to move from item to item within the line item detail



Item : EMS ALS Medical Cases

Item Data | **Notes and Attachments** | Conditions | Delivery

▼ Notes

Clear Filter Settings

Category	Description
Tendering text	Medical cases must contain three (3) trays or drawers, a...
Internal Note	-Empty-

▼ Attachments

Add Attachment Edit Description Versioning Delete Filter Settings

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
The table does not contain any data										

- On the item's Notes and Attachments tab, review the information defaulted from the shopping cart
 - Make any necessary additions or edits

Editing a Draft RFx

Document Builder (DB)

Edit RFx :

RFx Number 6100004510 Smart Number 15 EMS Supplies_Services FY 14-15 Type Invitation For Bid Status
 Number of Suppliers 5 Number of Items 4 Version Number Version Type Active Version

- Select the SAVE button to put the solicitation into a Saved status

Display RFx:

☒ RFx 15 EMS Supplies_Services FY 14-15 6100004510 saved

RFx Number 6100004510 Smart Number 15 EMS Supplies_Services FY 14-15 Type Invitation For Bid Status Saved
 Number of Suppliers 5 Number of Items 4 Version Number Version Type Active Version External

- Select the RELATED LINKS button
 - Select Document Builder from the dropdown menu

Editing a Draft RFx

What is Document Builder (DB)?

- DB is a software product that works with SRM to create legal documents from Solicitations, Purchase Orders, and Contracts
- DB is used with paper or electronically submitted responses for the creation of Commonwealth procurement documents
- The created SRM document is pulled into DB and, based on the document type and other inputs, the user answers a series of questions that builds a legal document
- DB automatically creates the type of legal document from which DB was launched: RFP, Purchase Order, etc.

Editing a Draft RFx

Creating a Legal Document

- DB interfaces with SRM for the creation of legal documents for the following solicitation types:
 - IFB
 - RFP
 - RFQ IT-ITQ
 - SPR
- DB also interfaces with SRM for the creation of legal documents for Contracts and Purchase Orders

Editing a Draft RFX

Creating a Legal Document

- Why does the non-IT RFQ not require the use of DB?
 - The non-IT RFQ is only used for acquiring price quotes from suppliers on existing ITQ contracts.

The T&Cs of the contract are associated with the follow-on document (a Purchase Order), so the output of the RFQ will contain language referring the supplier to their contract.

Editing a Draft RFx

Creating a Legal Document

- The questions that are answered in DB serve to build the legal document with T&Cs
- Certain T&Cs can be edited or removed; this is done under special circumstances and will be reviewed
- A user can add T&Cs as necessary for special terms
 - Text may be cut and pasted into DB, but it must be in HTML format

Editing a Draft RFx

Creating a Legal Document

- SRM automatically routes documents with non-standard T&Cs to identified approvers
 - The Purchaser must check the Non-Standard T&Cs checkbox in order to have the document workflow to the proper approvers

Editing a Draft RFX

Creating a Legal Document

- The RFQ IT-ITQ DB template was prepared by OA and DGS with Chief Counsel involvement and should not be edited
 - Through the solicitation process, we are including a statement of work to which the supplier provides a quote
- Contracts already exist with the IT suppliers, with T&Cs which are set, and cannot and should not be changed through the RFQ process
 - The resulting PO cannot add new or conflicting T&Cs because it is against an existing contract, not a new, comprehensive contract document

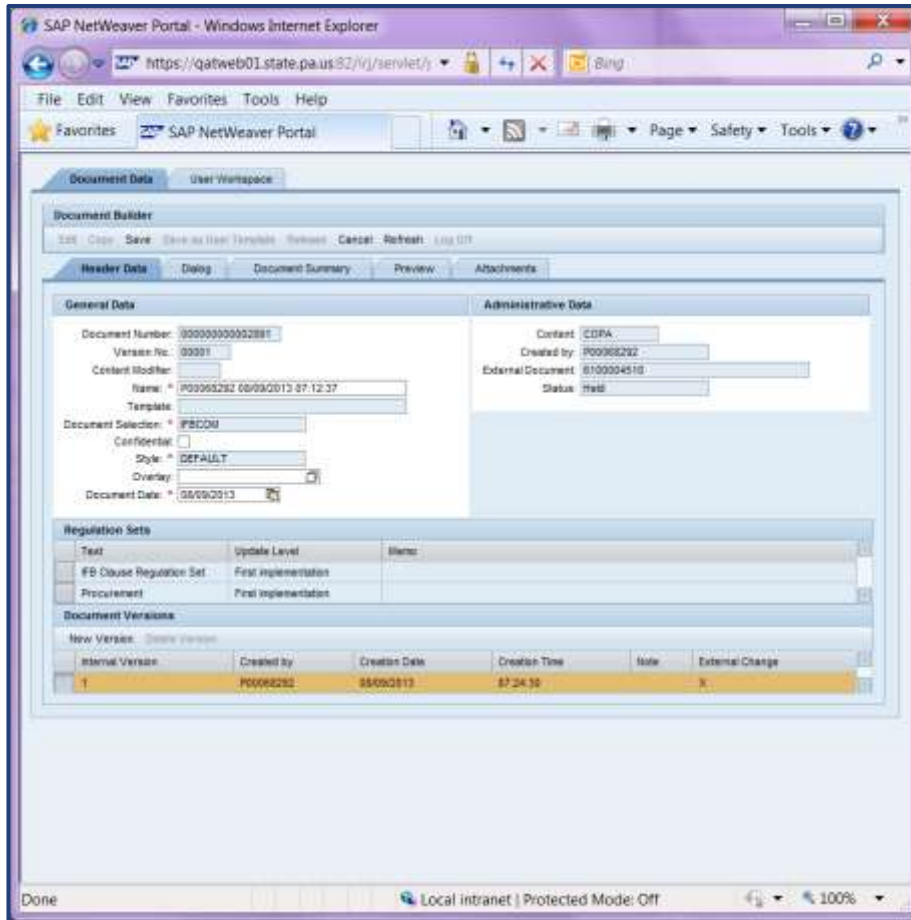
Editing a Draft RFx

Document Builder (DB)

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

Editing a Draft RFx

Document Builder (DB)



The screenshot shows the SAP NetWeaver Portal Document Builder interface. The browser window title is "SAP NetWeaver Portal - Windows Internet Explorer". The address bar shows the URL "https://qatweb01.state.pa.us:82/vj/servelet/y". The page has a menu bar with "File", "Edit", "View", "Favorites", "Tools", and "Help". Below the menu bar is a "Favorites" section with a link to "SAP NetWeaver Portal". The main content area is titled "Document Builder" and has a sub-header "Document Data". Below this is a "Header Data" tab, which is currently selected. The "Header Data" tab is divided into two sections: "General Data" and "Administrative Data".

General Data

- Document Number: 00000000002881
- Version No: 00001
- Content Modifier: P00062292 08/09/2013 07:12:37
- Template: P00062292
- Document Selection: PBCOM
- Confidential: ☐
- Style: DEFAULT
- Overlay: ☐
- Document Date: 08/09/2013

Administrative Data

- Content: CDPA
- Created by: P00062292
- External Document: 8100004518
- Status: Draft

Regulation Sets

Text	Update Level	Name
IFB Clause Regulation Set	First Implementation	
Procurement	First Implementation	

Document Versions

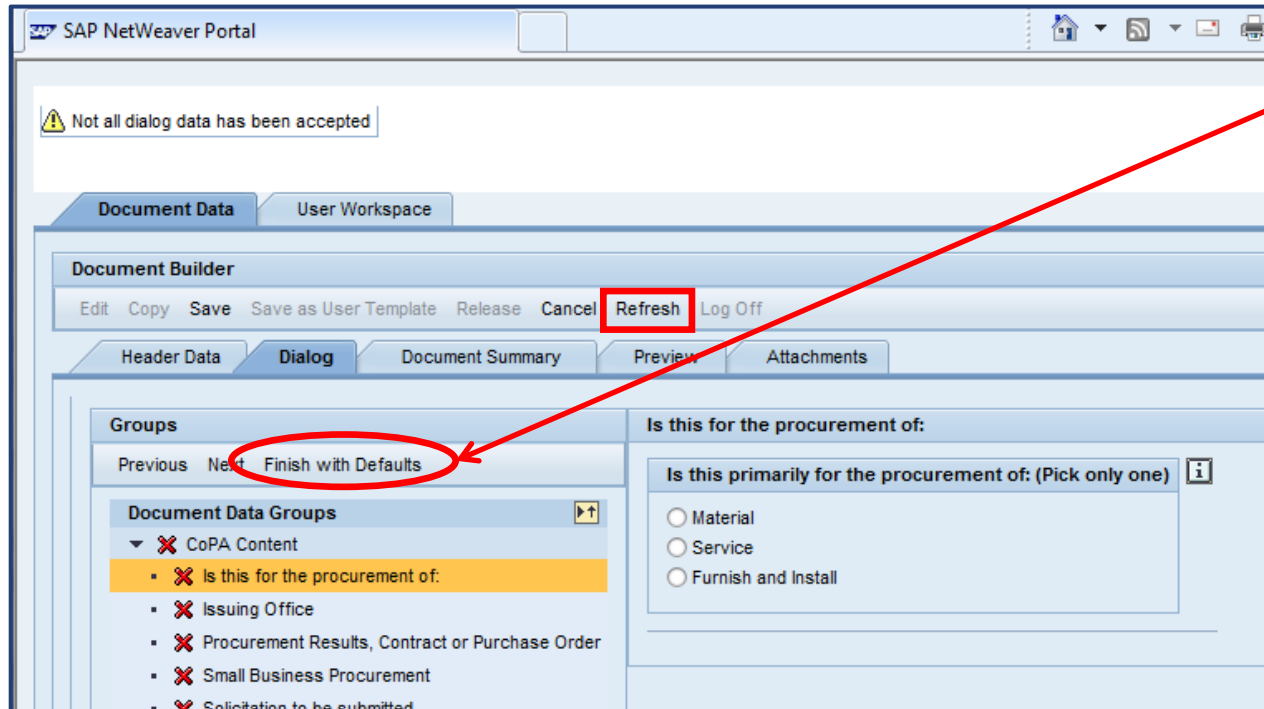
Internal Version	Created by	Creation Date	Creation Time	Note	External Change
1	P00062292	08/09/2013	07:14:15		X

The bottom status bar shows "Done", "Local intranet | Protected Mode: Off", and a zoom level of "100%".

- DB opens in a new window, on the Header Data tab
 - Verify the information defaulted from SRM
 - Make any necessary additions or edits to required fields

Editing a Draft RFx

Document Builder



SAP NetWeaver Portal

Not all dialog data has been accepted

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

- CoPA Content
 - Is this for the procurement of:
 - Issuing Office
 - Procurement Results, Contract or Purchase Order
 - Small Business Procurement
 - Solicitation to be submitted

Is this for the procurement of:

Is this primarily for the procurement of: (Pick only one)

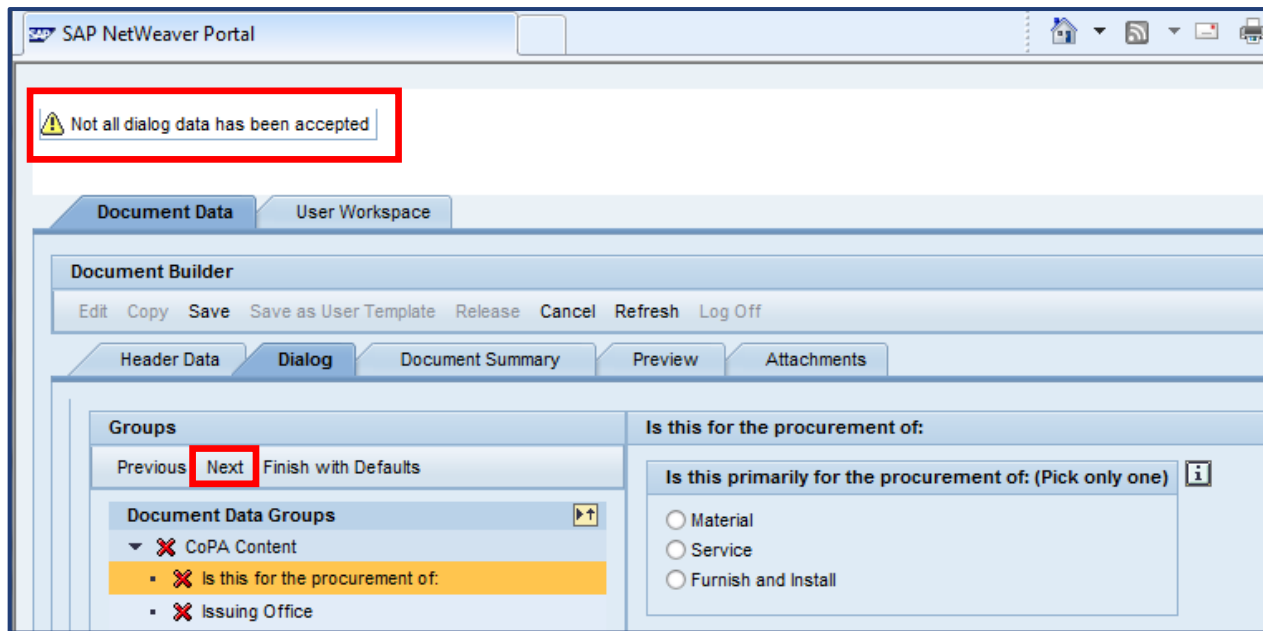
- Material
- Service
- Furnish and Install

Caution: Never use FINISH WITH DEFAULTS; each question should always be responded to individually.

- On the Dialog tab, view each question and, when applicable, respond with an answer
 - Select the REFRESH button after reviewing and/or responding to the question

Editing a Draft RFx

Document Builder



SAP NetWeaver Portal

⚠ Not all dialog data has been accepted

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

▼ ✖ CoPA Content

- ✖ Is this for the procurement of:
- ✖ Issuing Office

Is this for the procurement of:

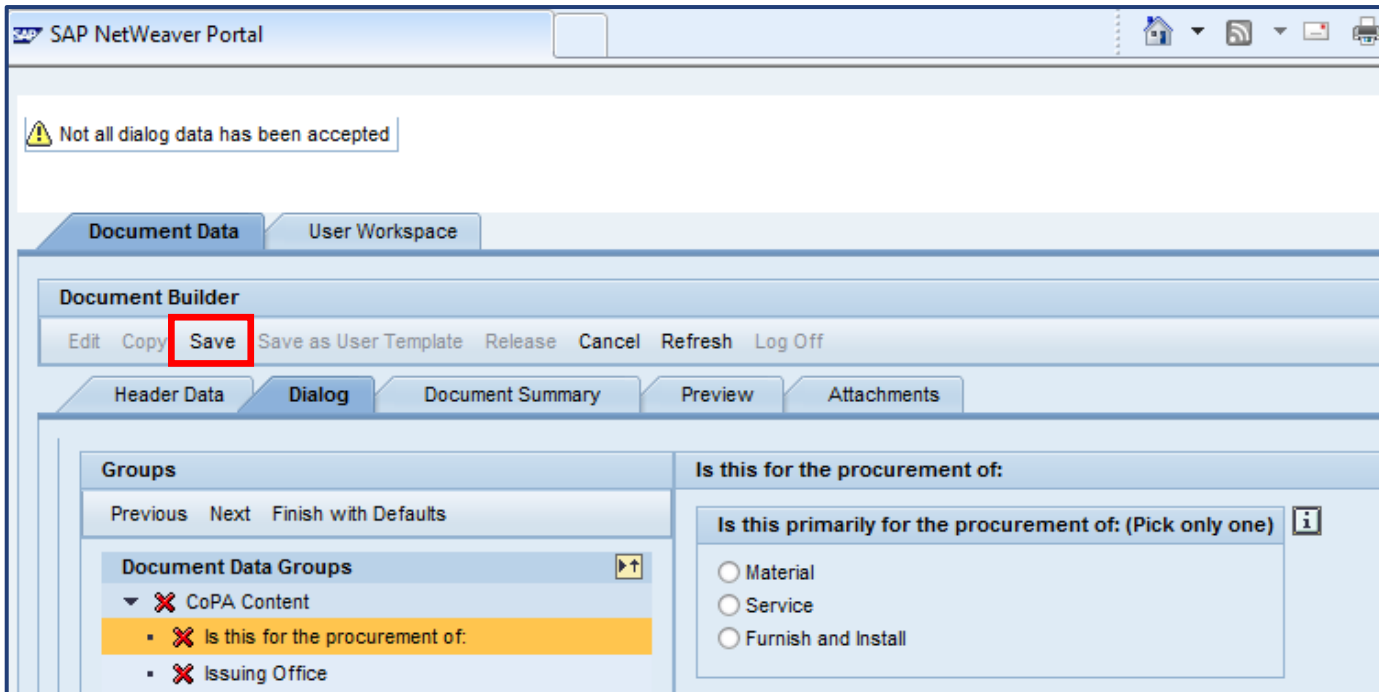
Is this primarily for the procurement of: (Pick only one) ⓘ

- ☐ Material
- ☐ Service
- ☐ Furnish and Install

- The default warning message “*Not all dialog data has been accepted*” displays in the upper left corner until all questions have been viewed
- Select the NEXT button to proceed to the next question

Editing a Draft RFx

Document Builder



SAP NetWeaver Portal

Not all dialog data has been accepted

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

- CoPA Content
 - Is this for the procurement of:
 - Issuing Office

Is this for the procurement of:

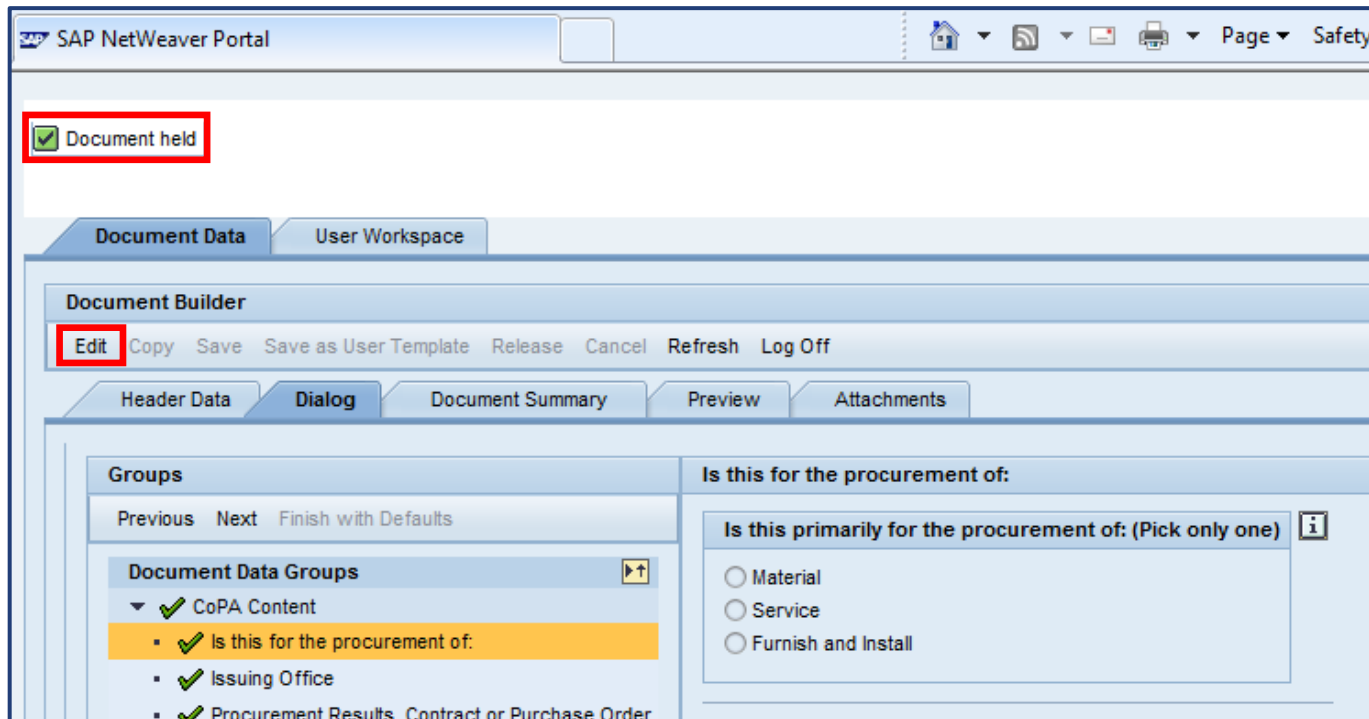
Is this primarily for the procurement of: (Pick only one)

- ☐ Material
- ☐ Service
- ☐ Furnish and Install

- Select the SAVE button at any time to hold and protect your work

Editing a Draft RFx

Document Builder



SAP NetWeaver Portal

☒ Document held

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

- ✓ CoPA Content
 - ✓ Is this for the procurement of:
 - ✓ Issuing Office
 - ✓ Procurement Results Contract or Purchase Order

Is this for the procurement of:

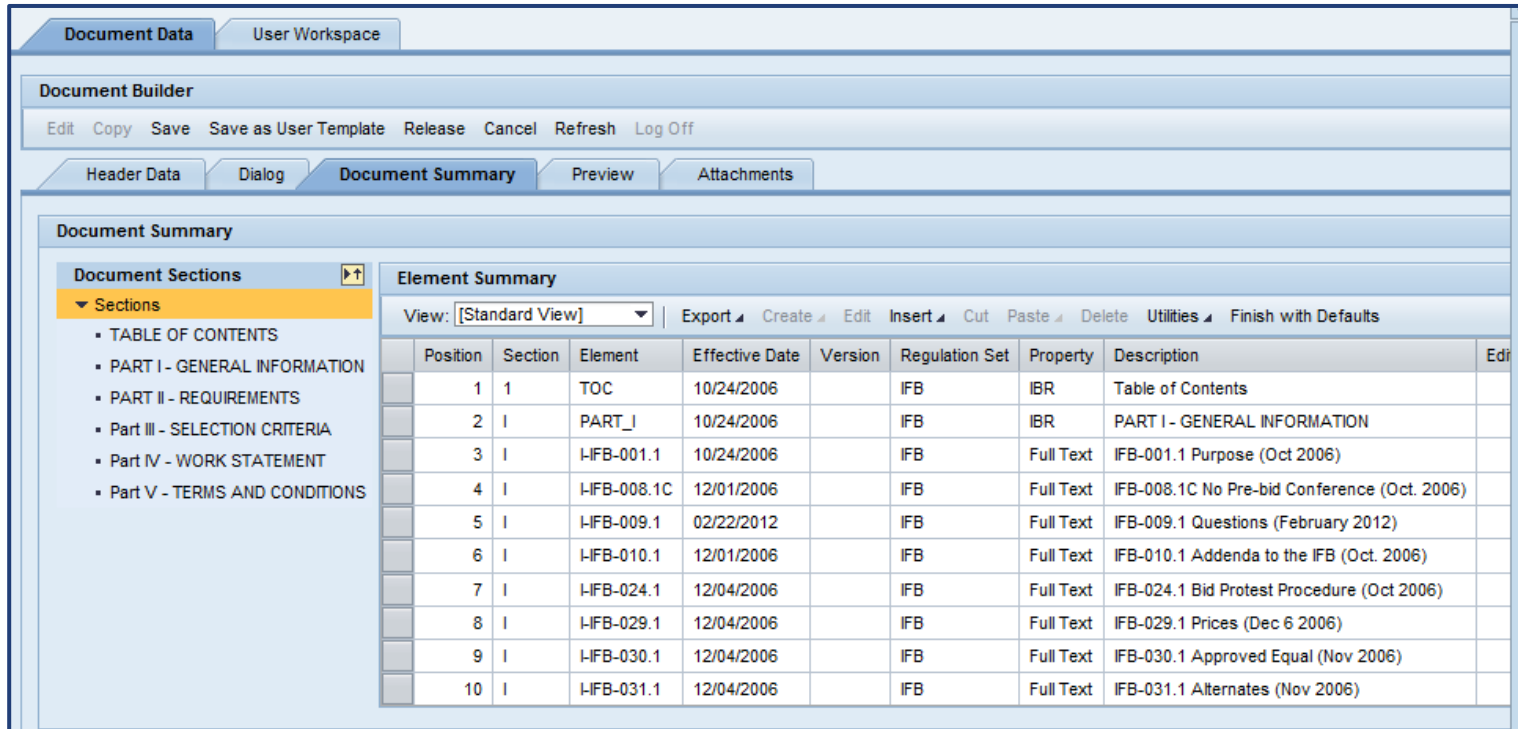
Is this primarily for the procurement of: (Pick only one) 

- ☐ Material
- ☐ Service
- ☐ Furnish and Install

- The message “Document held” displays after saving
- Select the EDIT button to continue viewing/responding to questions

Editing a Draft RFx

Document Builder



The screenshot shows the Document Builder application with the 'Document Summary' tab selected. The interface includes a menu bar with options like Edit, Copy, Save, and a toolbar with buttons for Export, Create, Edit, Insert, Cut, Paste, Delete, Utilities, and Finish with Defaults. A left sidebar lists document sections, and the main area displays a table of elements.

Document Summary

Document Sections

- TABLE OF CONTENTS
- PART I - GENERAL INFORMATION
- PART II - REQUIREMENTS
- Part III - SELECTION CRITERIA
- Part IV - WORK STATEMENT
- Part V - TERMS AND CONDITIONS

Element Summary

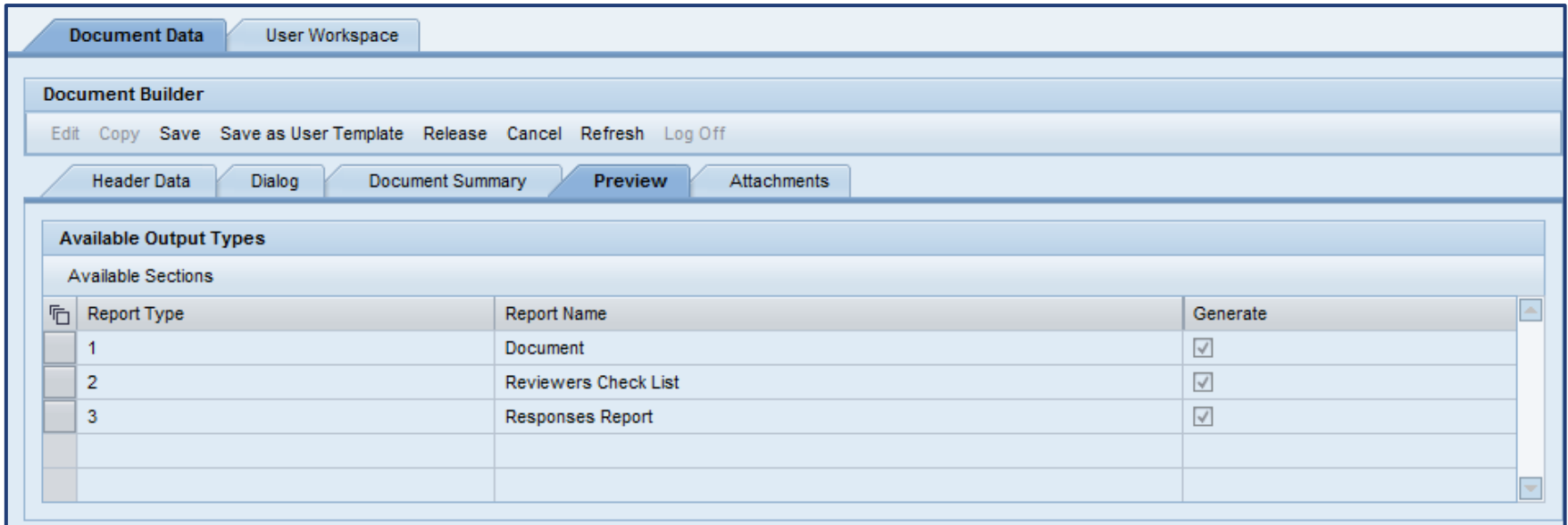
View: [Standard View] | Export | Create | Edit | Insert | Cut | Paste | Delete | Utilities | Finish with Defaults

	Position	Section	Element	Effective Date	Version	Regulation Set	Property	Description	Edr
	1	I	TOC	10/24/2006		IFB	IBR	Table of Contents	
	2	I	PART_I	10/24/2006		IFB	IBR	PART I - GENERAL INFORMATION	
	3	I	IIFB-001.1	10/24/2006		IFB	Full Text	IIFB-001.1 Purpose (Oct 2006)	
	4	I	IIFB-008.1C	12/01/2006		IFB	Full Text	IIFB-008.1C No Pre-bid Conference (Oct. 2006)	
	5	I	IIFB-009.1	02/22/2012		IFB	Full Text	IIFB-009.1 Questions (February 2012)	
	6	I	IIFB-010.1	12/01/2006		IFB	Full Text	IIFB-010.1 Addenda to the IFB (Oct. 2006)	
	7	I	IIFB-024.1	12/04/2006		IFB	Full Text	IIFB-024.1 Bid Protest Procedure (Oct 2006)	
	8	I	IIFB-029.1	12/04/2006		IFB	Full Text	IIFB-029.1 Prices (Dec 6 2006)	
	9	I	IIFB-030.1	12/04/2006		IFB	Full Text	IIFB-030.1 Approved Equal (Nov 2006)	
	10	I	IIFB-031.1	12/04/2006		IFB	Full Text	IIFB-031.1 Alternates (Nov 2006)	

- The Document Summary tab contains a table which lists the clauses contained in the document; the inclusion or exclusion of clauses is based on your responses

Editing a Draft RFx

Document Builder



The screenshot shows the 'Document Builder' interface. At the top, there are tabs for 'Document Data' and 'User Workspace'. Below these is a 'Document Builder' section with a menu bar containing 'Edit', 'Copy', 'Save', 'Save as User Template', 'Release', 'Cancel', 'Refresh', and 'Log Off'. Below the menu bar are tabs for 'Header Data', 'Dialog', 'Document Summary', 'Preview' (which is selected), and 'Attachments'. The 'Preview' tab displays a section titled 'Available Output Types' which contains a table of 'Available Sections'.

Report Type	Report Name	Generate
1	Document	<input checked="" type="checkbox"/>
2	Reviewers Check List	<input checked="" type="checkbox"/>
3	Responses Report	<input checked="" type="checkbox"/>

- The Preview tab contains three documents (reports) which are automatically generated as the questions on the Dialog tab are completed

Editing a Draft RFx

Document (Terms & Conditions)

Table of Contents

PART I - GENERAL INFORMATION.....	2
I.1 IFB-001.1 Purpose (Oct 2006)	2
I.2 IFB-008.1C No Pre-bid Conference (Oct. 2006)	2
I.3 IFB-009.1 Questions (February 2012).....	2
I.4 IFB-010.1 Addenda to the IFB (Oct. 2006).....	2
I.5 IFB-024.1 Bid Protest Procedure (Oct 2006)	2
I.6 IFB-029.1 Prices (Dec 6 2006).....	4
I.7 IFB-031.1 Alternates (Oct 2013).....	4
I.8 IFB-032.1 New Equipment (Nov 2006)	4
I.9 I-IFB-033.1 Modification or Withdrawal of Bid (Nov 2006)	4
I.10 I-IFB-034.1 Rejection of Bids (Nov 2006)	5

- Document is the complete T&Cs for the solicitation document, in Adobe PDF format. This will need to have the title changed once it is in the solicitation document.

Editing a Draft RFx

Reviewer's Report

Reviewer's Checklist for P00446880 01/02/2014 11:38:09 on 2014.01.02 (version 1)

Number	Prescription	Source	Section	Name	Title	Changes	Fillins
0001			I	TOC			
0002			I	PART_I	PART I - GENERAL INFORMATION		
0003			I	I-IFB-001.1	IFB-001.1 Purpose (Oct 2006)		PROJECT_TITLE = AGENCY_NAME =
0004			I	I-IFB-008.1C	IFB-008.1C No Pre-bid Conference (Oct. 2006)		
0005			I	I-IFB-009.1	IFB-009.1 Questions (February 2012)		
0006			I	I-IFB-010.1	IFB-010.1 Addenda to the IFB (Oct. 2006)		IFB_AGENCY_WEBSITE =
0007			I	I-IFB-024.1	IFB-024.1 Bid Protest Procedure (Oct 2006)		
0008			I	I-IFB-029.1	IFB-029.1 Prices (Dec 6 2006)		
0009			I	I-IFB-031.1	IFB-031.1 Alternates (Oct 2013)		
0010			I	I-IFB-032.1	IFB-032.1 New Equipment (Nov 2006)		

- Identifies, per clause, all fill-in responses, as well as any edits that were made to the document language.

Editing a Draft RFx

Responses Report

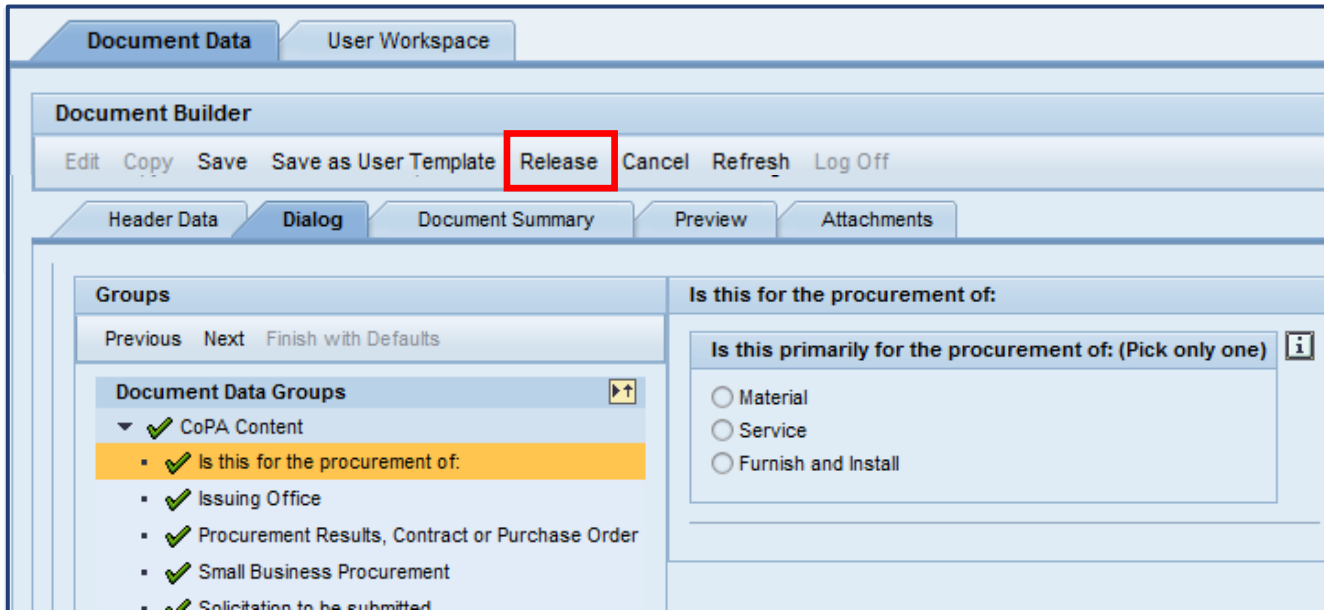
Responses Report for P00446880 01/02/2014 11:38:09 on 2014.01.02 (version 1)

Question	Response
Is this primarily for the procurement of: (Pick only one)	
Apparel	
Passenger Vehicles (Automobiles)	
Commercial Vehicles	
PennDOT	
Additional charge per vehicle	0.00
Printing	
Road Materials	
Paper or Paper Products	
Steel Products	
Prior Notification	
On Pallets	
IT	
Laundering Services	
None of the above	

- Identifies, per field, the responses (or lack of) which were entered for each question.

Editing a Draft RFx

Document Builder

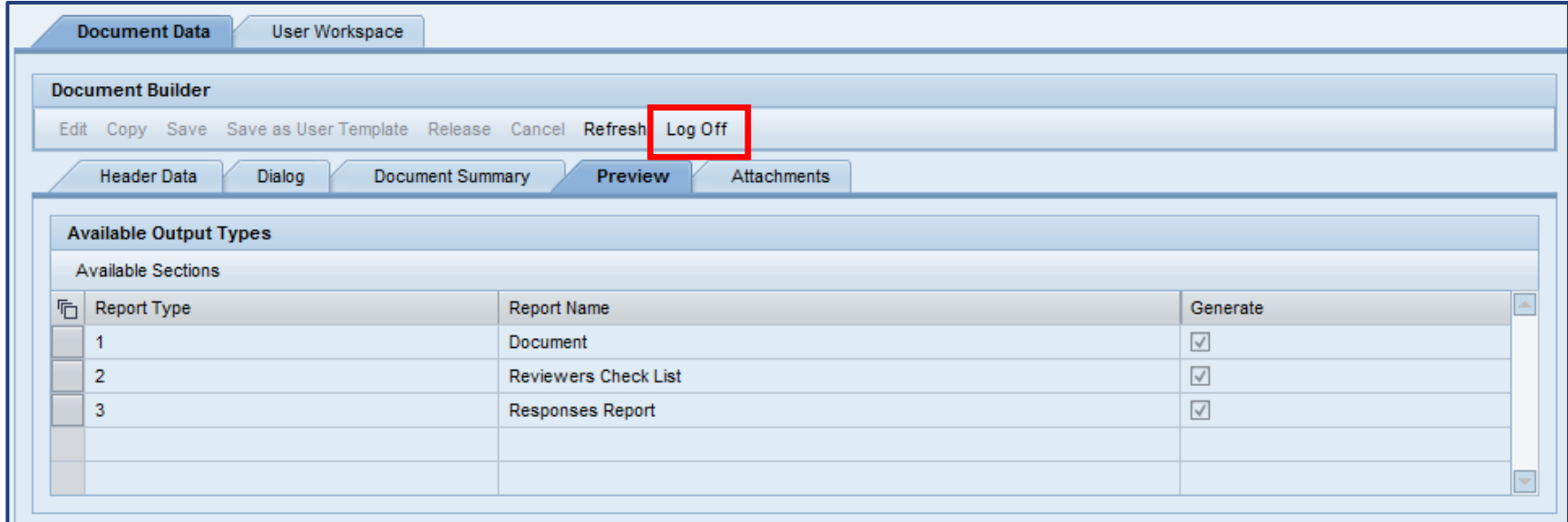


The screenshot shows the 'Document Builder' interface. At the top, there are tabs for 'Document Data' and 'User Workspace'. Below these is a toolbar with buttons: 'Edit', 'Copy', 'Save', 'Save as User Template', 'Release' (highlighted with a red box), 'Cancel', 'Refresh', and 'Log Off'. Below the toolbar are tabs for 'Header Data', 'Dialog' (selected), 'Document Summary', 'Preview', and 'Attachments'. The main area is divided into two sections. On the left, under 'Groups', there is a list of 'Document Data Groups' with a tree view. The 'CoPA Content' group is expanded, showing several sub-items, each with a green checkmark: 'Is this for the procurement of:', 'Issuing Office', 'Procurement Results, Contract or Purchase Order', 'Small Business Procurement', and 'Solicitation to be submitted'. On the right, under 'Is this for the procurement of:', there is a section titled 'Is this primarily for the procurement of: (Pick only one)' with three radio button options: 'Material', 'Service', and 'Furnish and Install'.

- The RELEASE button becomes available after all questions have been reviewed/responded to

Editing a Draft RFx

Document Builder



Document Builder

Edit Copy Save Save as User Template Release Cancel Refresh **Log Off**

Header Data Dialog Document Summary **Preview** Attachments

Available Output Types

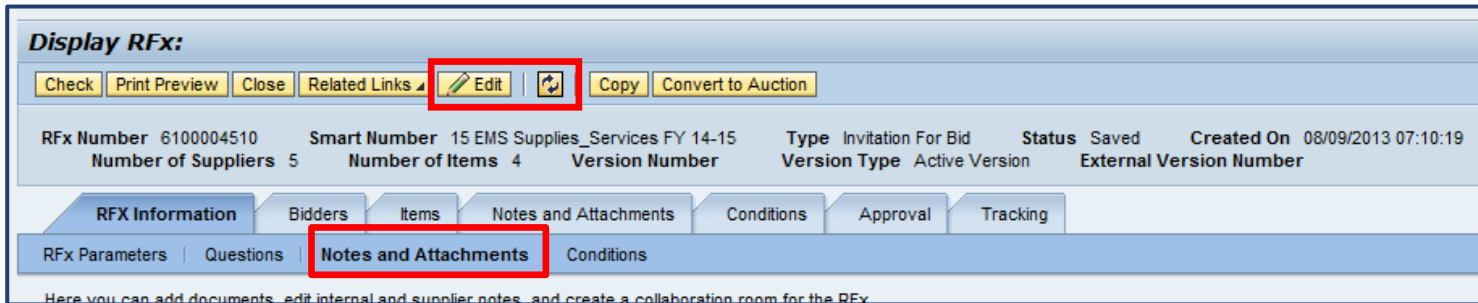
Available Sections

Report Type	Report Name	Generate
1	Document	<input checked="" type="checkbox"/>
2	Reviewers Check List	<input checked="" type="checkbox"/>
3	Responses Report	<input checked="" type="checkbox"/>

- When the legal documents have been migrated into SRM, the RELEASE button is no longer available
- Select the LOG OFF button to exit Document Builder

Editing a Draft RFx

Document Builder



Display RFx:

Check Print Preview Close Related Links **Edit** Refresh Copy Convert to Auction

RFx Number 6100004510 Smart Number 15 EMS Supplies_Services FY 14-15 Type Invitation For Bid Status Saved Created On 08/09/2013 07:10:19
Number of Suppliers 5 Number of Items 4 Version Number Version Type Active Version External Version Number

RFX Information Bidders Items Notes and Attachments Conditions Approval Tracking

RFx Parameters Questions **Notes and Attachments** Conditions

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx.

- Select the EDIT button in SRM
- Select the REFRESH button
 - The documents are attached to the Notes and Attachments sub-tab on the RFx Information tab

Editing a Draft RFx

Document Builder

RFX Information | Bidders | Items | Notes and Attachments | Conditions | Approval | Tracking

RFX Parameters | Questions | **Notes and Attachments** | Conditions

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes Filter Settings

[Clear](#)

Category	Description
Tendering text	Contract will be for 1 year upon the effect date of the ...
Internal Note	-Empty-
	-Empty-

▼ Attachments Filter Settings

[Add Attachment](#) | [Edit Description](#) | [Versioning](#) | [Delete](#)

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	Bid Specs for Emergency Medical Supplies	Bid Specs for Emergency Medical Supplies.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	18	P00446880	01/09/2014
Legal Document	Responses Report	Responses Report	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	36	SRMRFC	01/09/2014
Legal Document	Reviewers Check List	Reviewers Check List	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	42	SRMRFC	01/09/2014
Legal Document	Terms & Conditions	Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	75	SRMRFC	01/09/2014

- Locate the attachment titled “Document” and change it to “Terms & Conditions”
- Mark the other 2 documents “Visible Internally Only” by putting checks in the checkboxes

Editing a Draft RFx

Notes and Attachments

RFX Information

Bidders

Items

Notes and Attachments

Conditions

Approval

Tracking

▼ Notes

Add

Clear

Filter Settings

Assigned To	Category	Text Preview
Document Header	Internal Note	EMS supplies and services are needed in the event of a d...
Document Header	Tendering text	The Commonwealth of PA is seeking certain Emergency Medi...
Item01 "EMS ALS Medical Cases"	Tendering text	Medical cases must contain three (3) trays or drawers, a...
Item02 "Rescue Blankets"	Tendering text	Emergency rescue blankets must be insulated and water re...
Item03 "Emergency Stretcher"	Tendering text	Emergency Stretcher must contain 1.75" forged steel adju...
Item04 "Emergency Hospital Services"	Tendering text	Emergency Hospital Services will include but not be limi...

▼ Attachments

Add Attachment

Edit Description

Versioning

Delete

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	EMS RESCUE BLANKET SPECIFICATIONS	EMS Rescue Blanket Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00066292	08/09/2013
Document Header	Standard Attachment	EMS EMERGENCY STRETCHER SPECIFICATIONS	EMS Emergency Stretcher Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00066292	08/09/2013
Document Header	Standard Attachment	EMS ALS MEDICAL CASE SPECIFICATIONS	EMS ALS Medical Case Specifications.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00066292	08/09/2013
Document Header	Standard Attachment	EMERGENCY HOSPITAL SERVICES REQUIREMENTS	Emergency Hospital Services Requirements.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00066292	08/09/2013
Document Header	Legal Document	Terms and Conditions	Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	46	SRM/RFC	08/09/2013

- The primary Notes and Attachments tab is a collection of all notes and attachments from the entire document
 - The “Assigned To” column identifies whether they are at the Document Header or Item level
 - Additions or edits to any notes or attachments may be made on this tab

Editing a Draft RFx

Approval

Edit RFx :

[Publish](#) [Check](#) [Save](#) [Print Preview](#) [Close](#) [Related Links](#) [Read Only](#)

RFx Number: 6100027171 Smart Number: CKA RFx Demo 1-2-14 Type: Invitation For Bid Status: Saved Created On: 01/02/2014 11:19:35 Created By: Cynthia Anderson Time Zone: EST Number of Suppliers: 1 Number of Items: 3
 Version Number Version Type: Active Version External Version Number

[RFx Information](#) [Bidders](#) [Items](#) [Notes and Attachments](#) [Conditions](#) [Approval](#) [Tracking](#)

Current Status: Header Approval Note:
 Current Process Step:
 Currently Processed By:
 Approval Process Data: [Download as XML](#)

[Header](#) [Item](#)

Header Approval Status

[Remove Approver](#) [Settings](#)

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
001	SRM RFx Approval	Open (No Decision Made)	Cheryl Kleeman, Joel Shiffer, Brian Benbow, Richard Goul, Gregory Kharr, Thomas Te			

- Select the Approval Tab to review the levels of approval required

Editing a Draft RFx

Tracking

RFx Information Bidders Items Notes and Attachments Conditions Approval **Tracking**

▼ History

View: United States Dollar Filter Settings

Document	Name	Document Number	Back-End Document Number	Status	Date
Shopping Cart	CKA Test Cart for Demo 1-2-14	11512854		Approved	01/02/2014
RFx	CKA RFx Demo 1-2-14	6100027171		Saved	01/02/2014

▼ Status

System Status
Created > Incomplete > Held

▼ Version Overview

[Detail](#) [Compare](#)

Version	Document/Version Type	Created On	Changed On	Document Name	External Version Number
1	Active Document	01/02/2014 11:19:38	01/02/2014 11:38:33	CKA RFx Demo 1-2-14	

▼ Change Documents

Changed Since: Changed From/To: [Search](#) [Expand All](#) [Collapse All](#) [Hide Query](#) [Filter](#) [Settings](#)

Header/Item Attribute	Old Value	New Value	Changed By	Changed On	Changed At	Version
Header						

- Select the Tracking Tab to review the History, Status, Version Overview, and/or Change Documents of the Solicitation

Editing a Draft RFx

Publish the RFx

Edit RFx :

☒ RFx is complete and contains no errors

RFx Number	6100004510	Smart Number	15 EMS Supplies_Services FY 14-15	Type	Invitation For Bid	Status	Saved	Created On	08/09/2014
Number of Suppliers	5	Number of Items	4	Version Number	Version Type	Active Version	External Version Number		

[RFX Information](#)
[Bidders](#)
[Items](#)
[Notes and Attachments](#)
[Conditions](#)
[Approval](#)
[Tracking](#)

[RFX Parameters](#)
[Questions](#)
[Notes and Attachments](#)
[Conditions](#)

Identification
Event Parameters

Smart Number:
Detailed Price Information:

☐ Smart Number is External
 Follow On Document:

- Select the CHECK button to view and resolve any errors
- Select the PUBLISH button to send the RFx document through approval workflow

Advertising Solicitations

Advertising Overview

Posting the Solicitation to the Portal

Solicitation Publication Reminders:

- After creating the final legal document in Doc Builder and attaching it to the Solicitation document, select the PUBLISH button
 - SRM will automatically begin the following processes:
 - Workflow and Approvals
 - Publication to the Supplier Portal
 - The Solicitation will become visible to the suppliers, and open for response, when the Solicitation *Start Date* has been reached

Advertising Overview

Advertising Protocol

- A requirement to post this advertisement to eMarketplace is the creation and approval of the Notice of Forthcoming Procurement (NFP) form
 - The advertisement form contains a mandatory field for the NFP ID number generated when the form is created
 - More information on this form can be found in the Procurement Handbook

Advertising Overview

Advertising Protocol

- Posting the advertisement to eMarketplace provides minimal information about the Solicitation, and refers potential responders to the portal
 - Portal contains full information for registered suppliers
 - Registered suppliers can submit electronic solicitation responses directly through the portal
- This should be done only once the Solicitation has been fully approved
 - Posting to eMarketplace prior to being fully approved or prior to the Start Date will only confuse suppliers

Advertising Overview

For step-by-step instructions to submitting the Request to Advertise Online form, refer to the eMarketplace website at www.emarketplace.state.pa.us and choose the “Help” link

Bidders Response

Bidders Response

Vendor Administrator **Bidder**

Bidder

Bidder > Bidder > Bid Processing

Solicitations - All Auctions - All

Search Criteria

Solicitation Number: 6100027171 To

Solicitation Status: Current RFx To

Creation Date: To

Deadline Date Flag:

Status:

Response Timeframe:

Smart Number:

Apply Clear



View: [Standard View] Create Response Display Event Display Response Print Preview Refresh Export

Solicitation Number	Solicitation Description	Solicitation Type	Solicitation Status	Start Date	End Date	Response Number	Response
6100027171	CKA RFx Demo 1-2-14	Invitation For Bid	Published	01/02/2014	01/02/2014		No Bid Cre

- Bidder logs into PA Supplier Portal, selects the bidder tab
- Selects the bid they are interested in responding to

Bidders Response

Display Solicitation :

Print Preview  Close **Register** Export 

Solicitation Number 6100027171 Description CKA RFx Demo 1-2-14 Status Published Start Date 13:00:00 EST Submission Deadline 13:30:00 EST
 Remaining Time 0 Days 00:28:34 Solicitation Owner Cynthia Anderson Version Number 1 Version Type Active Version

Header Items

Basic Data Questions Note and Attachments Conditions


Time Zone: EST Bid Name: * CKA RFx Demo 1-1-14


Start Date: 01/02/2014 13:00:00

Submission Deadline: * 01/02/2014 13:30:00

Opening Date: 01/02/2014 13:31:00

Change does NOT require approval: ☐

▼ Partners and Delivery Information 



Details Add  Send E-Mail Call Clear Filter Settings

Function	Number	Name	Phone Number
▪ Requester		Cynthia Anderson	
▪ Goods Recipient		Cynthia Anderson	
▪ Responsible Employee		Cynthia Anderson	
▪ Ship-To Address		EXEC BRANCH	717-787-4719
▪ Location		DGS Bureau of Procurement	717-787-2199

- When the bid displays, the bidder must select the REGISTER button

Bidders Response

Display Solicitation :

Print Preview |  Close **Create Response** Export 


☒ You are registered to the RFx and will be informed of changes


Solicitation Number 6100027171 **Description** CKA RFx Demo 1-2-14 **Status** Published **Start Date** 13:00:00 EST **Submission Deadline** 13:30:00 EST
Remaining Time 0 Days 00:25:28 **Solicitation Owner** Cynthia Anderson **Version Number** 1 **Version Type** Active Version

Header | **Items**

Basic Data | Questions | Note and Attachments | Conditions

Time Zone: Bid Name: *
 Start Date:
 Submission Deadline: *
 Opening Date:
 Change does NOT require approval: ☐

▼ Partners and Delivery Information 

Details Add  Send E-Mail Call Clear Filter Settings

Function	Number	Name	Phone Number
Requester		Cynthia Anderson	
Goods Recipient		Cynthia Anderson	
Responsible Employee		Cynthia Anderson	
Ship-To Address		EXEC BRANCH	717-787-4719
Location		DGS Bureau of Procurement	717-787-2199

- Once the REGISTER button is selected, a message will display stating, “You are registered to the RFx and will be informed of changes.” The bidder then must select the CREATE RESPONSE button to start the bid response process.

Bidders Response

Create Response

Submit | Read Only | Print Preview | Check | Close | Save

1 Question "Has the submitter read, and does the submitter understand" is mandatory, maintain Question value

2 Question "Is the offer in accordance with the "Representative" is mandatory, maintain Question value

Solicitation Response Number: 000000157 Solicitation Number: 0100027171 Status: In Process Submission Deadline: 01/02/2014 13:38:00 EST Opening Date: 01/02/2014 13:31:00 EST Solicitation Owner: 0 Days 00:22:12 RFx Owner: Cynthia Anderson Response Version Number: 0.00 USD

Version Number: Active Versions RFx Version Number: 1

Header | Items | Summary | Tracking

Basic Data | Questions | Notes and Attachments

Event Parameters

Validity Period: -

Currency:

Target Value of RFx Response: USD

Status and Statistics

Created On:

Created By:

Last Processed On:

Last Processed By:

Partners and Delivery Information

Details | Send to Mail | Call | Clear

Function	Number	Name	Phone Number
+ Goods Recipient		Cynthia Anderson	
+ Ship-To Address		EXEC BRANCH	717-767-4716
+ Location		DOS Bureau of Procurement	717-767-2100

Filter Settings

- An error message will display stating that the Mandatory Questions must be completed

Bidders Response



The screenshot shows a web interface for a Bidders Response. At the top, there are four tabs: Header, Items, Summary, and Tracking. Below these, there are three sub-tabs: Basic Data, Questions (highlighted with a red box), and Notes and Attachments. The main area contains a table with two columns: Question and Reply. The first row has a question: "Is the offer in accordance with the 'Representations and Authorizations' listed in section 'Submission - 001.1' of the attached solicitation document?". The Reply column for this row has a dropdown menu (highlighted with a red box) showing "Y: Yes". The second row has a question: "Has the submitter read, and does the submitter understand, the 'Representations and Authorizations' listed in section 'Submission - 001.1' of the attached solicitation document?". The Reply column for this row has a dropdown menu.

Question	Reply	Comment
Is the offer in accordance with the 'Representations and Authorizations' listed in section 'Submission - 001.1' of the attached solicitation document?	Y: Yes	
Has the submitter read, and does the submitter understand, the 'Representations and Authorizations' listed in section 'Submission - 001.1' of the attached solicitation document?		

- The bidder must select the Questions sub-tab on the Header tab and answer the Questions by selecting the appropriate answer from the dropdown menu

Bidders Response

Create Response

Submit | Read Only | Print Preview | Check | Close | Save

Solicitation Response Number: 850002157 | Solicitation Number: 8100227171 | Status: In Process | Submission Deadline: 01/02/2014 13:30:00 EST | Opening Date: 01/02/2014 13:31:00 EST | Solicitation Owner: 0 Days 00:21:42 | RF's Owner: Cynthia Anderson | Response Version Number: 0.00 USD

Header | **Items** | Summary | Tracking

Item Overview

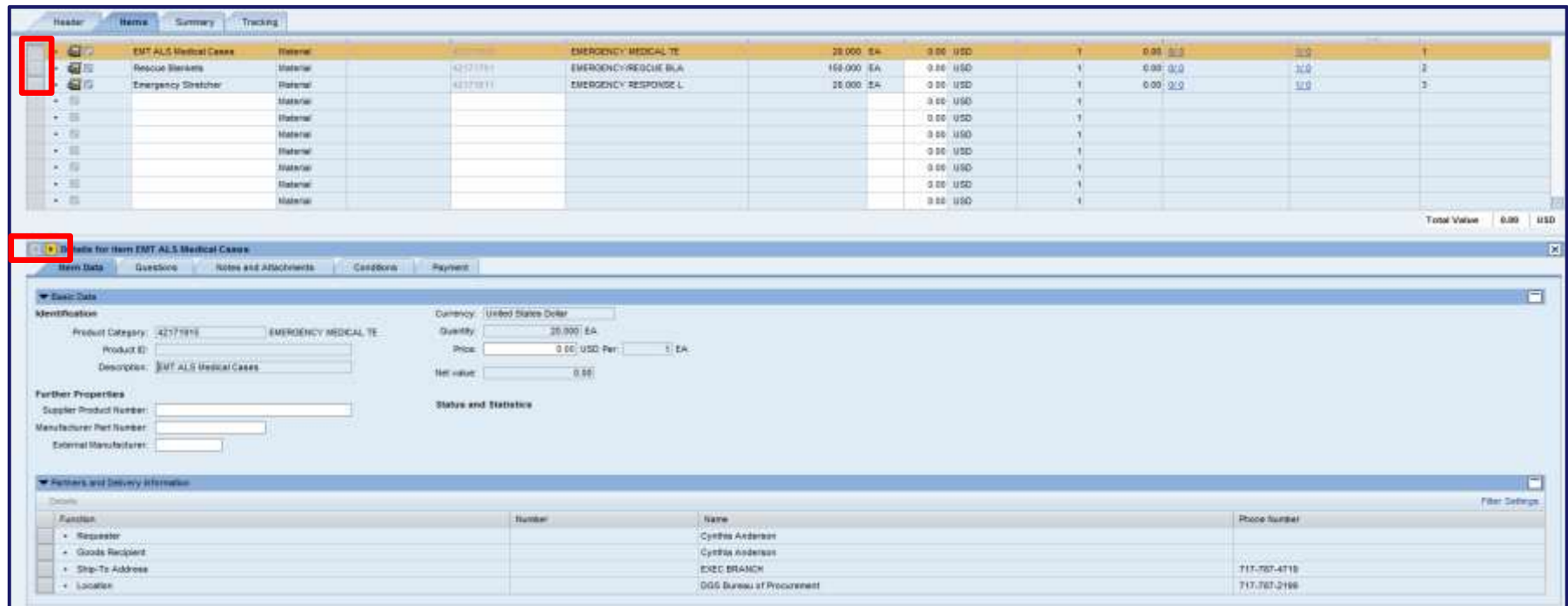
Details | Add New | Copy | Paste | Delete | Calculate Value

Line Number	Description	Item Type	Product ID	Product Category	Product Category Description	Required Quantity	Unit	Price	Currency	Price Per	Total Value	RF's / Response	RF's / Response	Internal Item Number
1	EMT ALS Medical Cases	Material	40171001	EMERGENCY MEDICAL TE	20,000	EA	0.00	USD	1	0.00	0.00	1	1	
2	Rescue Blankets	Material	40171001	EMERGENCY/RESCUE BLA	100,000	EA	0.00	USD	1	0.00	0.00	2	2	
3	Emergency Stretcher	Material	40171001	EMERGENCY RESPONSE L	20,000	EA	0.00	USD	1	0.00	0.00	3	3	
4		Material						0.00	USD	1				
5		Material						0.00	USD	1				
6		Material						0.00	USD	1				
7		Material						0.00	USD	1				
8		Material						0.00	USD	1				
9		Material						0.00	USD	1				
10		Material						0.00	USD	1				

Total Value: 0.00 USD

- The bidder then selects the items tab and reviews the information
- Selecting the DETAILS button will allow for further review of the line item details

Bidders Response



Item Details for Item EMT ALS Medical Cases

Basic Data

Identification
 Product Category: 42771911 EMERGENCY MEDICAL TE
 Product ID:
 Description: EMT ALS Medical Cases
 Currency: United States Dollar
 Quantity: 20,000 EA
 Price: 0.00 USD Per: 1 EA
 Net value: 0.00

Further Properties

Supplier Product Number:
 Manufacturer Part Number:
 External Manufacturer:
 Status and Statistics

Partners and Delivery Information

Function	Number	Name	Phone Number
Requester		Cynthia Anderson	
Goods Recipient		Cynthia Anderson	
Ship-To Address		EXEC BRANCH	717-767-4718
Location		DGS Bureau of Procurement	717-767-2166

- In the item details, the bidder can enter the pricing for each of the line items and any other information pertinent to the line item
- Navigation through the lines items is done by using the navigation arrows or by selecting the line item in the item overview

Bidders Response

Create Response

[Submit](#) | [Read Only](#) | [Print Preview](#) | [Check](#) | [Close](#) | [Save](#)

Solicitation Response Number 6500068157 **Solicitation Number** 6100027171 **Status** In Process **Submission Deadline** 01/02/2014 13:30:00 EST **Opening Date** 01/02/2014
Version Number Active Version **RFX Version Number** 1

[Header](#) | [Items](#) | **[Summary](#)** | [Tracking](#)

RFX Response Number: 6500068157

Items with Response: 3 out of 3 items responded to

Questions: 2 out of 2 questions answered (2 out of 2 mandatory)

Notes: 3 notes added

Attachments: No Attachments Added

Conditions: 3 conditions added

Total RFX Response Value: 8,093.00 USD

- The bidder can then select the Summary tab to review the information from the Bid Response

Bidders Response

Create Response

2 Submit **1** Read Only Print Preview Check Close Save

☒ RFX response is complete and contains no errors

Solicitation Response Number 6500068157 Solicitation Number 6100027171
Version Number Active Version RFX Version Number 1

Create Response

Edit Print Preview Refresh Close Withdraw

☒ RFX response 6500068157 submitted

Solicitation Response Number 6500068157 Solicitation Number 6100027171
Version Number Active Version RFX Version Number 1

- Once all information has been entered, the bidder selects the CHECK button to make sure the response is complete and contains no errors
- If there are no errors, the bidder can select the SUBMIT button. A message will display stating, “RFX response 65xxxxxxxxx submitted.”

Responses and Awards

Receive Responses Overview

Protocol for Public Openings: IFB

General Reminders:

- Purchaser specifies time and place of opening in the solicitation document (paper or electronic)
- The Public Bid Opening procedure, as issued in the Procurement Handbook, will be followed
- Purchaser generates a bid tabulation spreadsheet showing only the Responders' names and their bid amounts for units awarded (item, lot, or total, as appropriate)

Receive Responses Overview

General Reminders (cont'd):

- The bid tabulation must be posted on the eMarketplace website after the opening, under the Solicitation Tabulation section (**not** the award section)
- For RFPs, the Notice of Contractor Selection memo must be uploaded
 - Instructions on how to post this information can be found in the Help section on eMarketplace

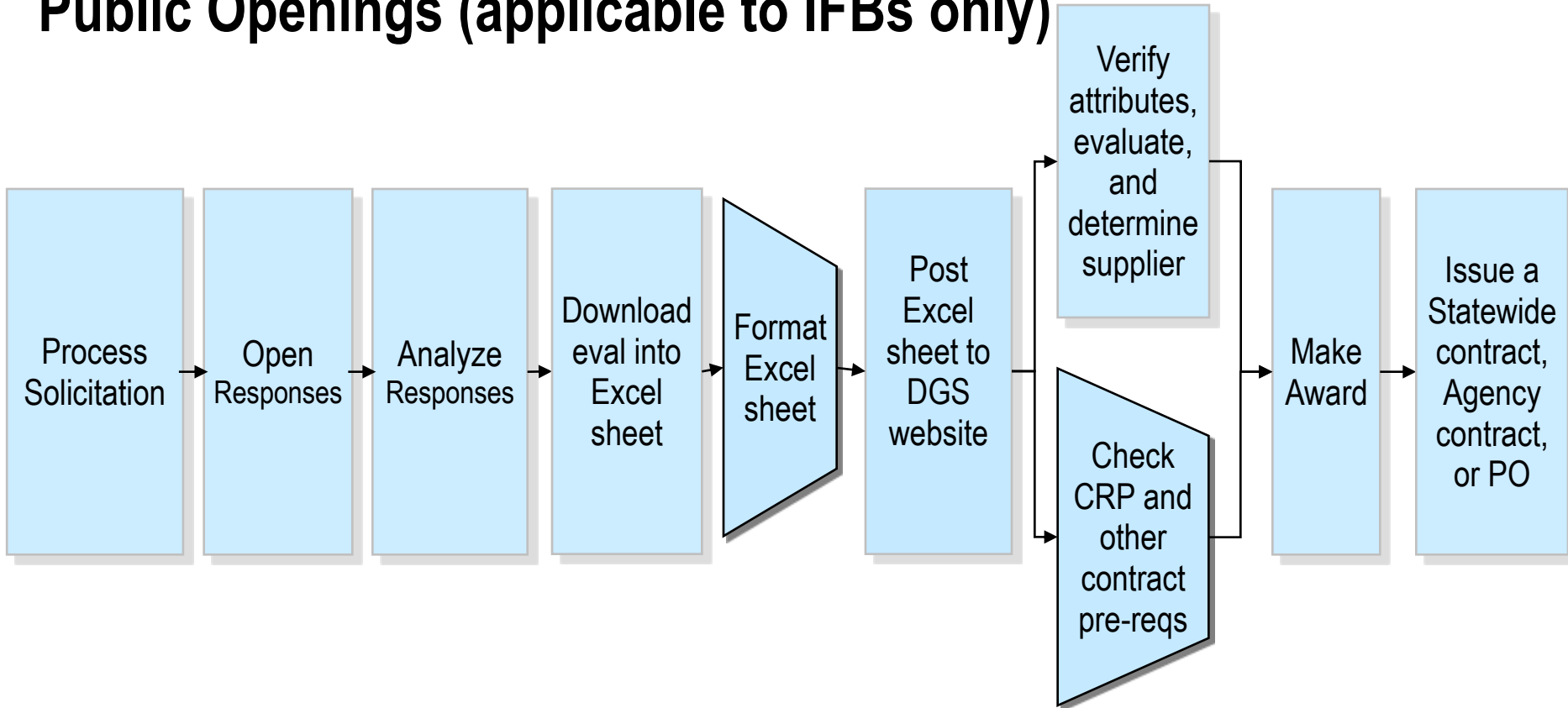
Receive Responses Overview

General Reminders (cont'd):

- For IT-ITQs, Instructions for Public Posting of All Awards for Solicitations Greater than \$50,000,
 - Agencies must post specific documents to the award section of eMarketplace; a list of documents that should be uploaded can be found on the ITQ Document Library Website
- Instructions on how to post this information can be found in the Help section on eMarketplace

Receive Responses Overview

Public Openings (applicable to IFBs only)



- Above responses contain only cost information
 - Submitted and opened electronically

Receive Responses Overview

General Reminders regarding RFP Evaluations

- Three items are submitted separately
 1. Technical (submitted on paper)
 2. Small Diverse Business (SDB) data (submitted on paper)
 3. Cost (submitted via SRM or on paper)

Responses and Awards

Overview of Responses and Awards

- Review and evaluate each supplier's response to the RFx
- Accept the response(s) for which a procurement award will be made
- Generate the award document(s)

Responses and Awards

Locate Supplier Responses

SRM

SRM > SRM > RFx and Auction

Full Screen Options

RFxs - All Auctions - All

Search Criteria

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
6100004510	15 EMS Supplies_Services FY 14-15	BID	Published		COPA Purchasing Organization	08/09/2013	5
6100004506	15 EMS Supplies_Services FY 14-15	BID	Saved		COPA Purchasing Organization	08/10/2013	0
6100004505	P00068292 08/08/2013 15:24	BID	Published		COPA Purchasing Organization	08/08/2013	1
6100004504	15 EMS Supplies_Services FY 14-15	RFQU	Saved		COPA Purchasing Organization	08/08/2013	0
6100004503	15 EMS Supplies-Services FY 14-15	BID	Saved		COPA Purchasing Organization	08/08/2013	0
6100004502	15 EMS Supplies-Services FY14-15	RFQU	Saved		COPA Purchasing Organization	08/08/2013	0
6100004500	Wood Chipper and Stump Grinder RFx	BID	Published		COPA Purchasing Organization	08/08/2013	0
6100004499	Wood Chipper and Stump Grinder RFx	RFQU	Saved		COPA Purchasing Organization	08/09/2013	0
6100004498	Wood Chipper and Stump Grinder2 RFx	RFQU	Saved		COPA Purchasing Organization		0
6100004497	P00068292 08/06/2013 09:50	BID	Saved		COPA Purchasing Organization		0

Last Refresh 08/09/2013 08:21:20 EST Refresh

- Search for the solicitation in the POWL
- Display the solicitation to review

Responses and Awards

Open the Responses

Display RFX :

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

RFX Number 6100027171
 Smart Number CKA RFX Demo 1-2-14
 Type Invitation For Bid
 Status Published
 Created On 01/02/2014 11:19:38
 Created By Cynthia Anderson
Time Zone EST
Number of Suppliers 4
Number of Items 3
Version Number 2
Version Type Active Version
External Version Number 1

[RFX Information](#)
[Bidders](#)
[Items](#)
[Notes and Attachments](#)
[Conditions](#)
[Approval](#)
[Tracking](#)

[RFX Parameters](#)
[Questions](#)
[Notes and Attachments](#)
[Conditions](#)

Identification

Smart Number:
☐ Smart Number is External
 RFX Type:
 Bid Description:
 Publication Type:

Event Parameters

Detailed Price Information:
 Follow-On Document:
 Bidder Can Change RFX Responses: ☒
 Allow Multiple RFX Responses for Each Company: ☐

Scenario Award/Contract

Organization

Purchasing Organization:
 Purchasing Group: [Show Members](#)

- Select the RESPONSES AND AWARDS button

Responses and Awards

Open the Responses

Responses and Awards

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

Remaining Time 0 Days 00:00:00 | Smart Number CKA RFx Demo 1-2-14 | Type Invitation For Bid | Status Published | Number of Suppliers 4 | RFx Number [6100027171](#)

Response Activity | Response Comparison | Surrogate Bidding

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

Response Number	Response Status	Company Name	Bidder Name	Response Version	Last Changed	Response on Behalf
6500068159	Submitted	CHARLES S WINNER INC			01/02/2014	
6500068158	Submitted	CENVEO CORPORATION			01/02/2014	
6500068157	Submitted	SAF-T-GARD INTERNATIONAL INC			01/02/2014	
		PUBLIC ADVERTISING SUPPLIER				

- The Responses and Awards screen displays
 - The Response Activity tab shows an overview of the bid responses for the RFx
 - Response Number, Response Status, etc.

Responses and Awards

Open the Responses

Responses and Awards

[Print Preview](#) |
 [Close](#) |
 [Create Follow-on RFx](#) |
 [Convert to Auction](#) |
 [Export](#) |
 [Questions and Answers \(0 \)](#)

Remaining Time 0 Days 00:00:00 |
 Smart Number CKA RFx Demo 1-2-14 |
 Type Invitation For Bid |
 Status Published |
 Number of Suppliers 4 |
 RFx Number [6100027171](#)

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

[Details](#) |
[Response On Behalf](#) |
[Contract Mass Update](#)

Response Number	Response Status	Company Name	Bidder Name	Response Version	Last Changed	Response on Behalf
6500068159	Submitted	CHARLES S WINNER INC			01/02/2014	
6500068158	Submitted	CENVEO CORPORATION			01/02/2014	
6500068157	Submitted	SAF-T-GARD INTERNATIONAL INC			01/02/2014	
		PUBLIC ADVERTISING SUPPLIER				

Expand Rows

- Select a link to view the quotation document

Responses and Awards

Open the Responses

Responses and Awards

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

Remaining Time 0 Days 00:00:00 | Smart Number CKA RFX Demo 1-2-14 | Type Invitation For Bid | Status Published | Number of Suppliers 4 | RFX Number [6100027171](#)

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

Compare Selected Responses | Compare All Responses | Simple Comparison

Response Number	Response Version	Company Name	Bidder Name
6500068159		CHARLES S WINNER INC	Richard Coyle
6500068157		SAF-T-GARD INTERNATIONAL INC	Anya Vinogradova
6500068158		CENVEO CORPORATION	sara pruit

- The Response Comparison tab provides the ability to compare the submitted responses to one another

Responses and Awards

Compare Responses

Responses and Awards

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

Remaining Time 0 Days 00:00:00 | Smart Number CKA RFX Demo 1-2-14 | Type Invitation For Bid | Status Published | Number of Suppliers 4 | RFX Number [6100027171](#)

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

Compare Selected Responses | **Compare All Responses** | Simple Comparison

Response Number	Response Version	Company Name	Bidder Name
6500068159		CHARLES S WINNER INC	Richard Coyle
6500068157		SAF-T-GARD INTERNATIONAL INC	Anya Vinogradova
6500068158		CENVEO CORPORATION	sara pruit

Response Activity

Response Comparison

Surrogate Bidding

Details

Display Bidders

Comparison Date: 01/02/2014

Back to Response Comparison Main View

Download Response Comparison

Export

Item Details								Richard Coyle : CHARLES S WINNER INC : Submitted			Anya Vinogradova : SAF-T-GARD INTERNATIONAL INC : Submitted			sara pruit : CENVEO CORPORATION : Submitted			
Item Number	Internal Number	Item Description	Lot	Product ID	RFX Required Quantity	Delivery Date	Unit	Action	Action Description	Price	Action	Action Description	Price	Action	Action Description	Submitted Quantity	Price
• 1		All Items						<input type="checkbox"/>	Accept All	8,170.00	<input type="checkbox"/>	Accept All	8,093.00	<input type="checkbox"/>	Accept All		7,997.50
• 2		All Items						<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All		
• 3	1	EMT ALS Medical Cases			20.000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,030.00	<input type="checkbox"/>	Accept	3,030.00	<input type="checkbox"/>	Accept		2,999.00
• 4	2	Rescue Blankets			100.000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,900.00	<input type="checkbox"/>	Accept	3,825.00	<input type="checkbox"/>	Accept		3,787.00
• 5	3	Emergency Stretcher			20.000	02/26/2014	EA	<input type="checkbox"/>	Accept	1,240.00	<input type="checkbox"/>	Accept	1,229.00	<input type="checkbox"/>	Accept		1,215.00

- Select the COMPARE ALL RESPONSES button to see an overview of the responses side by side

Responses and Awards

Compare Responses

Response Activity								Response Comparison								Surrogate Bidding							
Details								Display Bidders								Comparison Date: 01/02/2014							
Item Details								Richard Coyle : CHARLES S WINNER INC : Submitted								Anya Vinogradova : SAF-T-GARD INTERNATIONAL INC : Submitted							
Item Number	Internal Number	Item Description	Lot	Product ID	Rfx Required Quantity	Delivery Date	Unit	Action	Action Description	Price	Action	Action Description	Price	Action									
1		All Items						<input type="checkbox"/>	Accept All	8,170.00	<input type="checkbox"/>	Accept All	8,093.00	<input type="checkbox"/>									
2		All Items						<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All		<input type="checkbox"/>									
3	1	EMT ALS Medical Cases			20.000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,030.00	<input type="checkbox"/>	Accept	3,039.00	<input type="checkbox"/>									
4	2	Rescue Blankets			150.000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,900.00	<input type="checkbox"/>	Accept	3,825.00	<input type="checkbox"/>									
5	3	Emergency Stretcher			20.000	02/26/2014	EA	<input type="checkbox"/>	Accept	1,240.00	<input type="checkbox"/>	Accept	1,229.00	<input type="checkbox"/>									

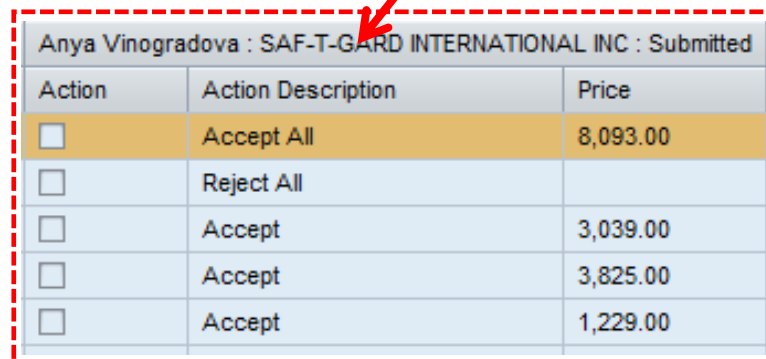
Item Details							
Item Number	Internal Number	Item Description	Lot	Product ID	Rfx Required Quantity	Delivery Date	Unit
1		All Items					
2		All Items					
3	1	EMT ALS Medical Cases			20.000	02/26/2014	EA
4	2	Rescue Blankets			150.000	02/26/2014	EA
5	3	Emergency Stretcher			20.000	02/26/2014	EA

- The Item Details area displays information pertaining to the solicitation line items

Responses and Awards

Compare Responses

Richard Coyle : CHARLES S WINNER INC : Submitted			Anya Vinogradova : SAF-T-GARD INTERNATIONAL INC : Submitted			sara prutt : CENVEO CORPORATION : Submitted				
Action	Action Description	Price	Action	Action Description	Price	Action	Action Description	Submitted Quantity	Price	Currency
<input type="checkbox"/>	Accept All	8,170.00	<input type="checkbox"/>	Accept All	8,093.00	<input type="checkbox"/>	Accept All		7,997.50	USD
<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All			
<input type="checkbox"/>	Accept	3,030.00	<input type="checkbox"/>	Accept	3,039.00	<input type="checkbox"/>	Accept		2,995.00	USD
<input type="checkbox"/>	Accept	3,900.00	<input type="checkbox"/>	Accept	3,825.00	<input type="checkbox"/>	Accept		3,787.50	USD
<input type="checkbox"/>	Accept	1,240.00	<input type="checkbox"/>	Accept	1,229.00	<input type="checkbox"/>	Accept		1,215.00	USD



Anya Vinogradova : SAF-T-GARD INTERNATIONAL INC : Submitted		
Action	Action Description	Price
<input type="checkbox"/>	Accept All	8,093.00
<input type="checkbox"/>	Reject All	
<input type="checkbox"/>	Accept	3,039.00
<input type="checkbox"/>	Accept	3,825.00
<input type="checkbox"/>	Accept	1,229.00

- The bid response details for each bidder are displayed side by side

Responses and Awards

Compare Responses

Responses and Awards

[Edit](#) [Print Preview](#) [Close](#) [Export](#) [Questions and Answers \(0\)](#)

Remaining Time 0 Days 00:00:00 Smart Number CKA RFX Demo 1-2-14 Type Invitation For Bid Status Published Number of Suppliers 4 RFX Number [6100027171](#)

[Main View](#) [Download Response Comparison](#)

Expand All Collapse All Filter Settings

			Richard Coyle : CHARLES S WINNER INC : Submitted			Anya Vinogradova : SAF-T-GARD INTERNATIONAL INC : Submitted			sara pruit : CENVEO CORPORATION : Submitted					
Submitted Quantity	Delivery Date	Unit	Action	Action Description	Price	Action	Action Description	Price	Action	Action Description	Submitted Quantity	Price	Currency	Weighted Score
			<input type="checkbox"/>	Accept All	8,170.00	<input type="checkbox"/>	Accept All	8,093.00	<input type="checkbox"/>	Accept All		7,997.50	USD	
			<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All		<input type="checkbox"/>	Reject All				
20,000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,030.00	<input type="checkbox"/>	Accept	3,039.00	<input type="checkbox"/>	Accept		2,995.00	USD	0.00
150,000	02/26/2014	EA	<input type="checkbox"/>	Accept	3,900.00	<input type="checkbox"/>	Accept	3,825.00	<input type="checkbox"/>	Accept		3,787.50	USD	0.00
20,000	02/26/2014	EA	<input type="checkbox"/>	Accept	1,240.00	<input type="checkbox"/>	Accept	1,229.00	<input type="checkbox"/>	Accept		1,215.00	USD	0.00

- Checkboxes are present on each item, and allow you to perform one of three (3) actions after selecting the EDIT button

Responses and Awards


Compare Responses

sara pruit : CENVEO CORPORATION : Submitted				
Action	Action Description	Submitted Quantity	Price	Currency
<input checked="" type="checkbox"/>	Accept All		7,997.50	USD
<input type="checkbox"/>	Reject All			
<input checked="" type="checkbox"/>	Accept		2,995.00	USD
<input checked="" type="checkbox"/>	Accept		3,787.50	USD
<input checked="" type="checkbox"/>	Accept		1,215.00	USD

- Use *Accept All* to accept all of the line item bids for the supplier
- Use *Reject All* to reject all of the line item bids for the supplier (this should only be used if the supplier is found to be non-responsive or non-responsible)
- Use *Accept* to accept bids per line item for a supplier

Responses and Awards

Compare Responses



Responses and Awards

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

Remaining Time 0 Days 00:00:00 | Smart Number 15 EMS Supplies_Services FY 14-15 | Type Invitation For Bid | Status Published | Number of Suppliers 5

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

Details | Display Bidders | Exclude Options: ☐ | Comparison Date: 08/09/2013 | **Back to Response Comparison Main View** | [Download Response Comparison](#)

Item Details | Multi Award Parent :

- Select the **BACK TO RESPONSE COMPARISON MAIN VIEW** to return to the previous screen
- Select the *Download Response Comparison* link to download the information into the Excel bid tabulation format

Responses and Awards

Compare Responses

Responses and Awards

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

Remaining Time 0 Days 00:00:00 | Smart Number 15 EMS Supplies_Services FY 14-15 | Type Invitation For Bid | Status Published | Num

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

Details | **Display Bidders** | Exclude Options: ☐ | Comparison Date: 08/09/2013 | Back to Response Comparison Main View | Download Respo

Item Details

Display Bidders

Company Name	Contact
<input type="checkbox"/> MULTI-AWARD PARENT	Multi_Award Parent
<input type="checkbox"/> EDWIN L HEIM CO	EDWIN11 EDWIN11
<input checked="" type="checkbox"/> SECCO	Secco11 Secco11
<input checked="" type="checkbox"/> PENNSYLVANIA INDUSTRIES FOR THE	PIBH Bidder
<input checked="" type="checkbox"/> SHAMROCK SPECIALTY SERVICES	Shamrock11 Shamrock11

Save and Close | Cancel

- Use the checkboxes to select only those responses to be displayed at one time
 - All responses remain available for viewing at another time
- SAVE AND CLOSE to continue

Responses and Awards

Compare Responses

Response Activity

Response Comparison

Surrogate Bidding

Details

Display Bidders

Exclude Options:

Comparison Date: 05/09/2013

Back to Response Comparison Main View

Download Response Comparison

Item Details										Multi_Award Parent: MULTIAWARD PARENT: Submitted										EDWIN11 EDWIN11	
Item Number	Internal Number	Item Description	Lot	Product ID	Rfx Required Quantity	Delivery Date	Unit	Cost	Cost Description	Estimated Quantity	Price	Currency	Weighted Score	Action	Action Desc						
1		All Items									47,390.00	USD		<input type="checkbox"/>	Accept All						
2		All Items												<input type="checkbox"/>	Reject All						
3	1	EMS ALS Medical Cases			75,000	10/02/2013	EA				11,621.25	USD	0.00	<input type="checkbox"/>	Accept						
4	2	Rescue Staircase			225,000	10/02/2013	EA				5,811.75	USD	0.00	<input type="checkbox"/>	Accept						
5	3	Emergency Stretcher			150,000	10/02/2013	EA				9,267.00	USD	0.00	<input type="checkbox"/>	Accept						
6	4	Emergency Hospital Services			80,000	10/02/2013	H				28,860.00	USD	0.00	<input type="checkbox"/>	Accept						

Item Details for Analysis: EMS ALS Medical Cases

Multi_Award Parent: MULTIAWARD PARENT: Submitted										EDWIN11 EDWIN11: EDWIN L HEM CO: Submitted										Secor	
Net price										154.95 USD Per 1,000 EA										150.90	
Net value										11,621.25 USD										11,317	
Bids w. Variants										No										No	
Additional Items										No										No	

- Select a line item to view the details of the responses to that line item by each supplier
 - The details of the line item response appear below the overview area

Responses and Awards

Accept a Response

Responses and Awards

Print Preview Close Create Follow-on RFs Convert to Auction Export Questions and Answers (0)

Remaining Time 0 Days 00:00:00 Smart Number 15 EMS Supplies_Services FY 14-15 Type Invitation For Bid Status Published Number of Suppliers 5 RFx Number 6100004510

Response Activity Response Comparison Surrogate Bidding

Details Responses 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
6100003631	Submitted	EDWIN L HEM CO		◆		08/09/2013	
6100003632	Submitted	SECCO		◆		08/09/2013	
6100003633	Submitted	PENNSYLVANIA INDUSTRIES FOR THE		◆		08/09/2013	
6100003634	Submitted	SHARROCK SPECIALTY SERVICES		◆		08/09/2013	
6100003635	Submitted	MULTI-AWARD PARENT		◆		08/09/2013	

- You may accept or reject a supplier's quotation while viewing it
 - Select the link containing the supplier's quotation number

Responses and Awards

Accept a Response

Edit RfX Response:

RfX Response Number 6500003633 RfX Name 15 EMS Supplies_Services FY 14-15 Status Submitted Supplier Name SHAMROCK SPECIALTY SERVICES
 Target Value 0.00 USD RfX Number [6100004510](#)

▼ Basic Data

<p>Bidder Contact Information</p> <p>Supplier Name: SHAMROCK SPECIALTY SERVICES</p> <p>Contact Person Name: Shamrock11 Shamrock11</p> <p>E-Mail: Shamrock11@state.pa.us</p> <p>Fax:</p> <p>Phone: 1231231233</p>	<p>RfX Response Information</p> <p>Last Changed On: 08/09/2013 18:38:43 EST</p> <p>Last Changed By: Angela Eshleman</p> <p>Creation Date: 08/09/2013 08:16:10 EST</p> <p>Created By: Mr. Shamrock11 Shamrock11</p>
<p>Event Parameters</p> <p>Process Type: <input type="text" value="QUOT"/></p> <p>Validity Period: <input type="text"/> - <input type="text"/></p> <p>Currency: <input type="text" value="United States Dollar"/></p> <p>Detailed Price Information: <input type="text" value="Price with Conditions"/></p> <p>Follow-On Document: <input type="text" value="Contract"/></p>	<p>Status and Statistics</p> <p>Created On: <input type="text" value="08/09/2013 08:16:10 EST"/></p> <p>Created By: <input type="text" value="Mr. Shamrock11 Shamrock11"/></p> <p>Last Processed On: <input type="text" value="08/09/2013 18:38:43 EST"/></p> <p>Last Processed By: <input type="text" value="Angela Eshleman"/></p>

- Select the ACCEPT or REJECT button as applicable

Responses and Awards

Accept a Response

Responses and Awards

Print Preview Close Display **Award** Export Questions and Answers (0)

Remaining Time 0 Days 00:00:00 Smart Number 15 EMS Supplies_Services FY 14-15 Type Invitation For Bid Status Published Number of Suppliers 5 RFx Number [6100004510](#)

Expand All Collapse All Filter Settings

co11 : SECCO : Submitted					PIBH Bidder : PENNSYLVANIA INDUSTRIES FOR THE : Submitted					Shamrock11 Shamrock11 : SHAMROCK SPECIALTY SERVICES : Submitted						
Item Description	Submitted Quantity	Price	Currency	Weighted Score	Action	Action Description	Submitted Quantity	Price	Currency	Weighted Score	Action	Action Description	Submitted Quantity	Price	Currency	Weighted Score
Accept All		46,150.25	USD		<input type="checkbox"/>	Accept All		46,333.75	USD		<input checked="" type="checkbox"/>	Accept All		45,416.25	USD	
Reject All					<input type="checkbox"/>	Reject All					<input type="checkbox"/>	Reject All				
Accept		11,317.50	USD	0.00	<input type="checkbox"/>	Accept		11,362.50	USD	0.00	<input checked="" type="checkbox"/>	Accept		11,137.50	USD	0.00
Accept		5,658.75	USD	0.00	<input type="checkbox"/>	Accept		5,681.25	USD	0.00	<input checked="" type="checkbox"/>	Accept		5,568.75	USD	0.00
Accept		9,054.00	USD	0.00	<input type="checkbox"/>	Accept		9,090.00	USD	0.00	<input checked="" type="checkbox"/>	Accept		8,910.00	USD	0.00
Accept		20,120.00	USD	0.00	<input type="checkbox"/>	Accept		20,200.00	USD	0.00	<input checked="" type="checkbox"/>	Accept		19,800.00	USD	0.00

- You may also accept or reject a supplier's quotation while comparing responses
 - Select the checkboxes for the supplier's applicable line item(s)
- Select the AWARD button

Responses and Awards

Accepted and Rejected Responses

- An accepted response does not need to be approved at the “accept” stage
 - Workflow is behind and ahead of the acceptance
 - Solicitation was approved
 - Follow-on documents will be approved
- Remember that there is a difference between **rejecting** a response and **not accepting** a response
 - A response that is not accepted requires no action
 - Do **not** select the REJECT button or the ACCEPT button
 - The status must continue to display in the portal as “Submitted”
 - Do not list the reason for rejection anywhere except on **internal notes** areas

Responses and Awards

There are 7 reasons to reject a response

1. Documents are not signed (paper submissions only)
2. Response does not meet specifications
3. Supplier conditioned the response
4. Security was not offered (if required)
5. Supplier did not respond to all items (for Group Award only)
6. Supplier did not respond to other mandatory requirements (considered “not responsive”)
7. Response was submitted late (for paper responses)

Responses and Awards

Appeals and Protests

- Awards are posted on eMarketplace, and suppliers are responsible for checking that site
- A supplier has seven (7) days to protest an award after they could reasonably be expected to be aware of the award
 - For more information on protests go to LSO, Web-based Training and take the Protest Training Course

Responses and Awards

Best and Final Offers (BAFO)

- Select the CREATE FOLLOW-ON RFx button to start the process
 - All suppliers who responded to the original solicitation will be listed in the newly created document (copy of the original)
 - Be certain to delete all suppliers who will not be participating in the BAFO
 - Be certain that you set the Publication Type to “Restricted”, or it will be visible to anyone in the PA Supplier Portal

Responses and Awards

Accept a Response

Responses and Awards

[Edit](#)
[Print Preview](#)
[Close](#)
[Export](#)
[Questions and Answers \(0 \)](#)

⚠ RFX response 6500003630 has not yet been awarded as no decision has been made
 ⚠ RFX response 6500003631 has not yet been awarded as no decision has been made
 ⚠ RFX response 6500003632 has not yet been awarded as no decision has been made
 ⚠ RFX response 6500003634 has not yet been awarded as no decision has been made
 ✓ RFX response 6500003633 (15 EMS Supplies_Services FY 14-15) accepted

Remaining Time 0 Days 00:00:00
 Smart Number 15 EMS Supplies_Services FY 14-15
 Type Invitation For Bid
 Status Published
 Number of Suppliers 5
 RFX Number [6100004510](#)

Expand All Collapse All Filter Settings

co11 : SECCO : Submitted					PIBH Bidder : PENNSYLVANIA INDUSTRIES FOR THE : Submitted					Shamrock11 Shamrock11 : SHAMROCK SPECIALTY SERVICES : Awaiting Approval						
Action Description	Submitted Quantity	Price	Currency	Weighted Score	Action	Action Description	Submitted Quantity	Price	Currency	Weighted Score	Action	Action Description	Submitted Quantity	Price	Currency	Weighted Score
Accept All		46,150.25	USD		<input type="checkbox"/>	Accept All		46,333.75	USD		<input checked="" type="checkbox"/>	Accept All		45,416.25	USD	
Reject All					<input type="checkbox"/>	Reject All					<input type="checkbox"/>	Reject All				
Accept		11,317.50	USD	0.00	<input type="checkbox"/>	Accept		11,362.50	USD	0.00	<input checked="" type="checkbox"/>	Accept		11,137.50	USD	0.00
Accept		5,658.75	USD	0.00	<input type="checkbox"/>	Accept		5,681.25	USD	0.00	<input checked="" type="checkbox"/>	Accept		5,568.75	USD	0.00
Accept		9,054.00	USD	0.00	<input type="checkbox"/>	Accept		9,090.00	USD	0.00	<input checked="" type="checkbox"/>	Accept		8,910.00	USD	0.00
Accept		20,120.00	USD	0.00	<input type="checkbox"/>	Accept		20,200.00	USD	0.00	<input checked="" type="checkbox"/>	Accept		19,800.00	USD	0.00

- Messages display indicating that the response was accepted
- The status of the supplier's quotation changes to "Awaiting Approval"

Responses and Awards

Accept a Response

Responses and Awards

[Edit](#) |
 [Print Preview](#) |
 [Close](#) |
 [Export](#) |
 [Questions and Answers \(0 \)](#)

- ⚠ RfX response 6500003630 has not yet been awarded as no decision has been made
- ⚠ RfX response 6500003631 has not yet been awarded as no decision has been made
- ⚠ RfX response 6500003632 has not yet been awarded as no decision has been made
- ⚠ RfX response 6500003634 has not yet been awarded as no decision has been made
- ✅ RfX response 6500003633 (15 EMS Supplies_Services FY 14-15) accepted

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

sara pruit : CENVEO CORPORATION : Awaiting Approval				
Action	Action Description	Submitted Quantity	Price	Currency
<input checked="" type="checkbox"/>	Accept All		7,997.50	USD
<input type="checkbox"/>	Reject All			
<input checked="" type="checkbox"/>	Accept		2,995.00	USD
<input checked="" type="checkbox"/>	Accept		3,787.50	USD
<input checked="" type="checkbox"/>	Accept		1,215.00	USD

Response Activity		Response Comparison	Surrogate Bidding
<div>DetailsResponse On BehalfContract Mass Update</div>			
	Response Number	Response Status	Company Name
	6500068159	Submitted	CHARLES S WINNER INC
	6500068158	Awaiting Approval	CENVEO CORPORATION
	6500068157	Submitted	SAF-T-GARD INTERNATIONAL INC
			PUBLIC ADVERTISING SUPPLIER

Responses and Awards

Create an Award

Responses and Awards

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

☒ Click 'Refresh' to view the latest information

Remaining Time 0 Days 00:00:00 | Smart Number CKA RFx Demo 1-2-14 | Type Invitation For Bid | Status Published | Number of Suppliers 4 | RFx Number [6100027171](#)

Response Activity | Response Comparison | Surrogate Bidding

Details | Response On Behalf | Contract Mass Update

Response Number	Response Status	Company Name	Bidder Name	Response Version	Last Changed	Response on Behalf
6500068159	Submitted	CHARLES S WINNER INC			01/02/2014	
6500068158	Awaiting Approval	CENVEO CORPORATION			01/02/2014	
6500068157	Submitted	SAF-T-GARD INTERNATIONAL INC			01/02/2014	
		PUBLIC ADVERTISING SUPPLIER				

Expand Rows

- A system message displays instructing you to select the REFRESH button. This will change the status in the supplier's Response Status of the Response Activity tab to "Accepted"
- Select the Response Number of the "Accepted" supplier to create the award

Responses and Awards

Create an Award

Display RFX Response:

Print Preview | Close | Export | **Create Contract** | Publish To Catalog | Undo Accept

Rfx Response Number 6500068158 Rfx Name CKA Rfx Demo 1-2-14 Status Accepted Supplier Name CENVEO CORPORATION Target Value 0.00 USD
Rfx Number [6100027171](#)

Rfx Information | Items | Notes and Attachments | Conditions | Approval | Tracking

General Data | Notes and Attachments | Questions

▼ Basic Data

<p>Bidder Contact Information</p> <p>Supplier Name: CENVEO CORPORATION</p> <p>Contact Person Name: sara pruit</p> <p>E-Mail: sara.pruitt@cenvco.com</p> <p>Fax: 812-981-4974</p> <p>Phone: 812-981-4999</p>	<p>Rfx Response Information</p> <p>Last Changed On: 01/02/2014 14:15:21 EST</p> <p>Last Changed By: Cynthia Anderson</p> <p>Creation Date: 01/02/2014 13:13:01 EST</p> <p>Created By: Ms. sara pruit</p>
--	---

<p>Event Parameters</p> <p>Process Type: QUOT</p> <p>Validity Period: -</p> <p>Currency: United States Dollar</p> <p>Detailed Price Information: Price with Conditions</p> <p>Follow-On Document: Contract</p> <p>Target Value of Rfx in Original Currency: 11,050.00 USD</p> <p>Target Value of Rfx in Selected Currency: 11,050.00 USD</p> <p>Target Value of Rfx Response: 0.00 USD</p> <p>Net Value of Header Items: 0.00 USD</p>	<p>Status and Statistics</p> <p>Created On: 01/02/2014 13:13:01 EST</p> <p>Created By: Ms. sara pruit</p> <p>Last Processed On: 01/02/2014 14:15:21 EST</p> <p>Last Processed By: Cynthia Anderson</p>
--	---

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

Responses and Awards

Create an Award

Display RFX Response:

Print Preview | Close | Export | Create Contract | Publish To Catalog | **Undo Accept**

RFX Response Number 6500068158 RFX Name CKA RFX Demo 1-2-14 Status Accepted Supplier Name CENVEO CORPORATION Target Value 0.00 USD
RFX Number [6100027171](#)

Rfx Information | Items | Notes and Attachments | Conditions | Approval | Tracking

General Data | Notes and Attachments | Questions

▼ Basic Data

<p>Bidder Contact Information</p> <p>Supplier Name: CENVEO CORPORATION</p> <p>Contact Person Name: sara pruit</p> <p>E-Mail: sara.pruitt@cenvco.com</p> <p>Fax: 812-981-4974</p> <p>Phone: 812-981-4999</p>	<p>RFX Response Information</p> <p>Last Changed On: 01/02/2014 14:15:21 EST</p> <p>Last Changed By: Cynthia Anderson</p> <p>Creation Date: 01/02/2014 13:13:01 EST</p> <p>Created By: Ms. sara pruit</p>
--	---

<p>Event Parameters</p> <p>Process Type: QUOT</p> <p>Validity Period: -</p> <p>Currency: United States Dollar</p> <p>Detailed Price Information: Price with Conditions</p> <p>Follow-On Document: Contract</p> <p>Target Value of RFX in Original Currency: 11,050.00 USD</p> <p>Target Value of RFX in Selected Currency: 11,050.00 USD</p> <p>Target Value of RFX Response: 0.00 USD</p> <p>Net Value of Header Items: 0.00 USD</p>	<p>Status and Statistics</p> <p>Created On: 01/02/2014 13:13:01 EST</p> <p>Created By: Ms. sara pruit</p> <p>Last Processed On: 01/02/2014 14:15:21 EST</p> <p>Last Processed By: Cynthia Anderson</p>
--	---

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

Responses and Awards

Create an Award

Display RFX Response:

Print Preview | Close | Export | Create Contract | Publish To Catalog | Undo Accept

RFX Response Number 6500068158 RFX Name CKA RFX Demo 1-2-14 Status Accepted Supplier Name CENVEO CORPORATION Target Value 0.00 USD
RFX Number 6100027171

RFX Information | Items | Notes and Attachments | Conditions | Approval | Tracking

General Data | Notes and Attachments | Questions

▼ Basic Data

Bidder Contact Information
Supplier Name: CENVEO CORPORATION
Contact Person Name: sara pruit
E-Mail: sara.pruitt@cenvco.com
Fax: 812-981-4974
Phone: 812-981-4999

Event Parameters
Process Type: QUOT
Validity Period: -
Currency: United States Dollar
Detailed Price Information: Price with Conditions
Follow-On Document: Contract
Target Value of RFX in Original Currency: 11,050.00
Target Value of RFX in Selected Currency: 11,050.00
Target Value of RFX Response: 0.00
Net Value of Header Items: 0.00

Organization
Responsible Purchasing Organization: O 50008882 COPA
Responsible Purchasing Group: O 50008932 DGS Central Purchase Purchasing Group

RFX Response Information
Last Changed On: 01/02/2014 14:15:21 EST
Last Changed By: Cynthia Anderson
Creation Date: 01/02/2014 13:13:01 EST
Ms. sara pruit

Status and Statistics
Created On: 01/02/2014 13:13:01 EST
Created By: Ms. sara pruit
Last Processed On: 01/02/2014 14:15:21 EST
Last Processed By: Cynthia Anderson

Create Contract

Select from the following transaction types:

Transaction Type	Description
ZASS	Agy Sole Source Svc
ZAWC	Agency Contract
ZITQ	ITQ DGS Contract
ZSDC	SW DirRsl Hrchy Sply
ZSDS	SW DirRsl Hrchy Serv

Create Contract Cancel

- The contract transaction types display for selection

Responses and Awards

Create an Award

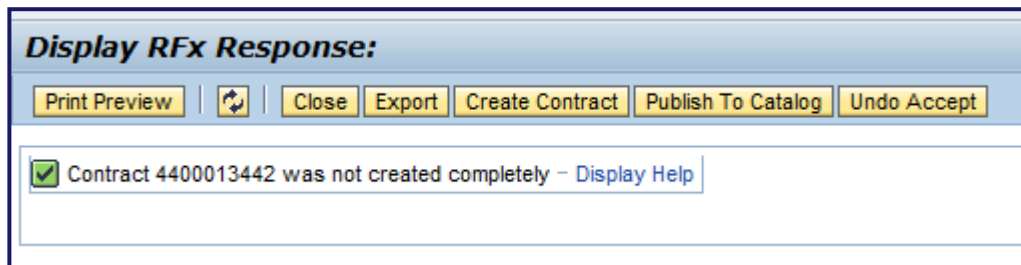


Create Contract

Select from the following transaction types:

Transaction Type	Description
<input type="checkbox"/> ZASS	Agy Sole Source Svc
<input checked="" type="checkbox"/> ZAWC	Agency Contract
<input type="checkbox"/> ZITQ	ITQ DGS Contract
<input type="checkbox"/> ZSDC	SW DirRsl Hrchy Sply
<input type="checkbox"/> ZSDS	SW DirRsl Hrchy Serv

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



Display RFX Response:

☒ Contract 4400013442 was not created completely - [Display Help](#)

- A message displays with the draft contract number

Editing the Contract

Editing the Contract

Editing the Contract

- Review the Contract
 - Verify that all of the data from the supplier's response is complete and accurate
 - If applicable, make any edits to the information
- On each tab, enter any necessary data into the appropriate fields, and/or attach documents
- Release the Contract for workflow approval

Editing the Contract

Editing the Contract

SRM

SRM > SRM > Purchasing Full Screen Options

Central Contracts - All Purchase Orders - All Shopping Carts - All

Search Criteria

Number: To

Contract Type:

Name:

Status:

Timeframe:

Creation Date: To

Purchasing Organization:

Purchasing Group:

Supplier:

Product:

Item Description:

Product Category:

Distribution:

Valid From: To

Smart Number:

Apply Clear

View: [Standard View] Create Central Contract Copy Display Edit Mass Change Display Hierarchy Data Exchange Print Preview Refresh

Export

Central Contract Number	Central Contract Name	Status	Purchasing Organization	Supplier	Valid From	Valid To	Hierarchy
4400013442	CKA RFx Demo 1-2-14	Saved	COPA Purchasing Organization	CENVEO CORPORATION	01/02/2014	12/31/9999	<input type="checkbox"/>

- Locate and select the draft Contract in the Purchasing POWL

Editing the Contract

Display Agency Contract 4400013442

Close Release **Edit** Copy Check Negotiate Print Preview Related Links

Contract Number: 4400013442 Smart Number: CKA RFx Demo 1-2-14 Contract Type: Agency Contract Status: Saved Supplier: 171430 CENVED CORPORATION
Contract Owner: 703389 Cynthia Anderson

Overview Header Items Notes and Attachments Conditions Approval Tracking

General Header Data

Contract Number: 4400013442 Contract Owner: 703389 Cynthia Anderson
Smart Number: CKA RFx Demo 1-2-14 Target Value/ Currency: 0.00 USD
☐ Smart Number is External Release Value: 0.00 USD
Contract Description: Basic Contract: ☐
Supplier: 171430 CENVED CORPORATION
Valid From / To: 01/03/2014 - 12/31/9999
Purchasing Organization: COPA Purchasing Organization
Purchasing Group: DGS Central Purchase Purchasing Group [Show Members](#)

Items

Details Select Add Item Exercise Option Copy Paste Duplicate Delete Filter Settings

Line Number	Item Category	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Price Per	Price Unit	Reference Item Number
1	Normal	1		EMT ALS Medical Cases	42171011	20.000		EA	2,995.00	149.75	USD	1	EA	0
2	Normal	2		Rescue Blankets	42171701	150.000		EA	3,787.50	25.25	USD	1	EA	0
3	Normal	3		Emergency Stretcher	42171011	20.000		EA	1,215.00	60.75	USD	1	EA	0

- The draft Contract displays
- Select the EDIT button to begin making changes

Editing the Contract

Overview Tab

Change Agency Contract 440006486

Read Only Close Release Save Check Print Preview Delete Related Links

Contract Number: 440006486 Smart Number: 15 EMS Supplies_Services FY 14-15 Contract Type: Agency Contract Status: Saved Supplier: 210251 SHAMROCK SPECIALTY SERVICES
Contract Owner: 337344 Angela Eshleman

Overview Header Items Notes and Attachments Conditions Approval Tracking

General Header Data

Contract Number: 440006486 Contract Owner: 337344 Angela Eshleman
Smart Number: 15 EMS Supplies_Services FY Target Value/Currency: 45,416.25 USD
☐ Smart Number is External Release Value: 0.00 USD
Contract Description: 15 EMS Supplies_Services FY 14-15 Basic Contract: ☐
Supplier: 210251 SHAMROCK SPECIALTY SERVICES
Valid From / To: 07/01/2014 - 06/30/2015
Purchasing Organization: COPA Purchasing Organization
Purchasing Group: XB1 - DGS Angela L Eshleman Show Members

Items

Details Select Add Item Edit Item Copy Paste Duplicate Delete Filter Settings

Line Number	Item Category	Item Number	Product ID	Description	Product Category	Target Quantity	Unit	Target Value	Price	Currency	Price Per	Price Unit
1	Normal	1		EMS ALS Medical Cases	42171912	75.000	EA	11,137.50	148.50	USD	1	EA
2	Normal	2		Rescue Blankets	42171701	225.000	EA	5,568.75	24.75	USD	1	EA
3	Normal	3		Emergency Stretcher	42171611	150.000	EA	5,910.00	59.40	USD	1	EA
4	Normal	4		Emergency Hospital Services	85101501	80.000	H	19,800.00	247.50	USD	1	H
	Normal					0.000		0.00	0.00	USD	0	
	Normal					0.000		0.00	0.00	USD	0	
	Normal					0.000		0.00	0.00	USD	0	

- The Overview tab contains high-level information about the Contract
 - Name the Contract; Enter a Validity Period and Target Value/Currency
 - Edits and/or additions may be made on this tab, or on the Header tab

Editing the Contract

Overview Tab

Change Agency Contract 4400006486

Read Only | Close | Release | Save | Check | Print Preview | Delete | Related Links ▾

❗ Workflow Process not defined

❗ Please enter header target value.

❗ Item 1 target value is greater than contract header target value.

❗ Contract creation <= 10K not allowed

Contract Number 4400006486 Smart Number 15 EMS Supplies_Services FY 14-15 Contract Type Agency Contract Status Saved Supplier [210251 SHAMRO](#)

Contract Owner [337344 Angela Eshleman](#)

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

General Header Data

Contract Number: Contract Owner: [Angela Eshleman](#)

Smart Number: Target Value/Currency: USD

- Error messages pertaining to the draft contract's incomplete fields may display
 - Review and address as required

Editing the Contract

Header Tab - Basic Data Sub-tab

Change Agency Contract 4400006486

Read Only | Close | Release | Save | Check | Print Preview | Delete | Related Links

Warning: Sourcing criteria are missing from contract item - Display Help

Line 1: Sourcing criteria are missing from contract item

Line 2: Sourcing criteria are missing from contract item

Line 3: Sourcing criteria are missing from contract item

Line 4: Sourcing criteria are missing from contract item

Contract Number: 4400006486 Smart Number: 15 EMS Supplies_Services FY 14-15 Contract Type: Agency Contract Status: Saved Supplier: SIGNAL SHAMROCK SPECIALTY SERVICES

Contract Owner: 337344 Angela Exlerman

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

Basic Data | Conditions | Hierarchy | Notes and Attachments | Output

Identification

Smart Number: 15 EMS Supplies_Services FY
☐ Smart Number is External

Contract Number: 4400006486
 Contract Type: Agency Contract
 Basic Contract: ☐
 Reason Code:

Organization

Purchasing Organization: COPA Purchasing Organization
 Purchasing Group: X01 - DGS Angela L. Exlerman [Show Hierarchy](#)

Dates

Valid From / To: 06/09/2013 - 12/31/9999
 Alert Expiration: 0 Day(s)

Currency, Values and Pricing

Currency: USD
 Target Value: 45,416.25 USD
 Alert Release Value: 0 %
 Release Value: 0.00 USD

Service and Delivery

Under/Overdelivery Tolerance: 0.00 % / 0.00 %

Status and Statistics

Created On: 06/09/2013
 Created By: P00068292
 Cancellation Status: None

Contract Name: 15 EMS Supplies_Services FY 14-15
 Non Standard Terms & Conditions: ☐

Partner

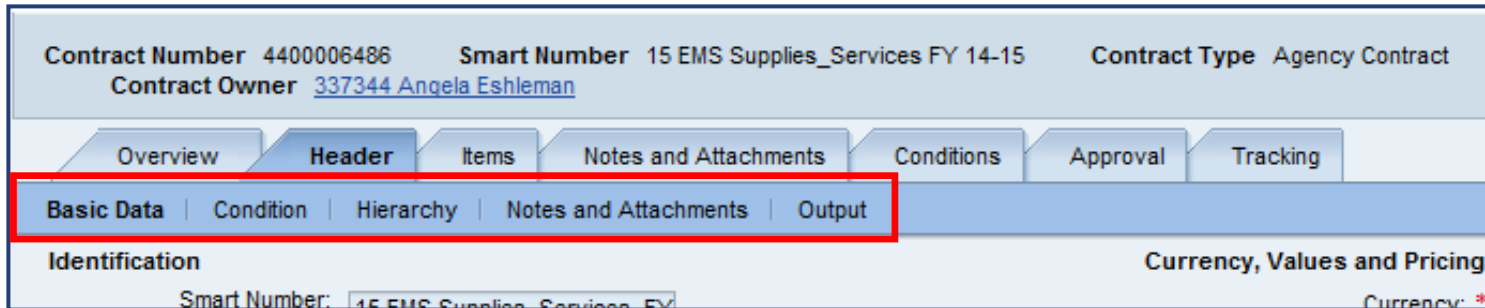
Details | Add | Send E-Mail | Call | Clear

Function	Exclude	Number	Name	Phone Number
• Vendor	<input type="checkbox"/>	210251	SHAMROCK SPECIALTY SERVICES	717-777-7777
• Goods Recipient	<input type="checkbox"/>			
• Responsible Employee	<input type="checkbox"/>	337344	Angela Exlerman	
• Purch. Org. Auth. For Release	<input type="checkbox"/>			
• Location	<input type="checkbox"/>	multiple	multiple	multiple

- Additional messages pertaining to the draft contract's incomplete fields may display
 - Review and address as applicable

Editing the Contract

Header Tab - Basic Data Sub-tab



The screenshot shows the 'Header' tab selected in a contract management system. At the top, contract details are displayed: Contract Number 4400006486, Smart Number 15 EMS Supplies_Services FY 14-15, and Contract Type Agency Contract. Below this, the Contract Owner is listed as 337344 Angela Eshleman. A series of tabs (Overview, Header, Items, Notes and Attachments, Conditions, Approval, Tracking) are visible, with 'Header' being the active tab. Under the 'Header' tab, a sub-tab bar contains 'Basic Data', 'Condition', 'Hierarchy', 'Notes and Attachments', and 'Output'. The 'Basic Data' sub-tab is highlighted with a red border. Below the sub-tab bar, the 'Identification' section shows the Smart Number: 15 EMS Supplies_Services FY. The 'Currency, Values and Pricing' section is partially visible at the bottom right, showing 'Currency: *'.

Contract Number 4400006486 Smart Number 15 EMS Supplies_Services FY 14-15 Contract Type Agency Contract
Contract Owner [337344 Angela Eshleman](#)

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

Basic Data | Condition | Hierarchy | Notes and Attachments | Output

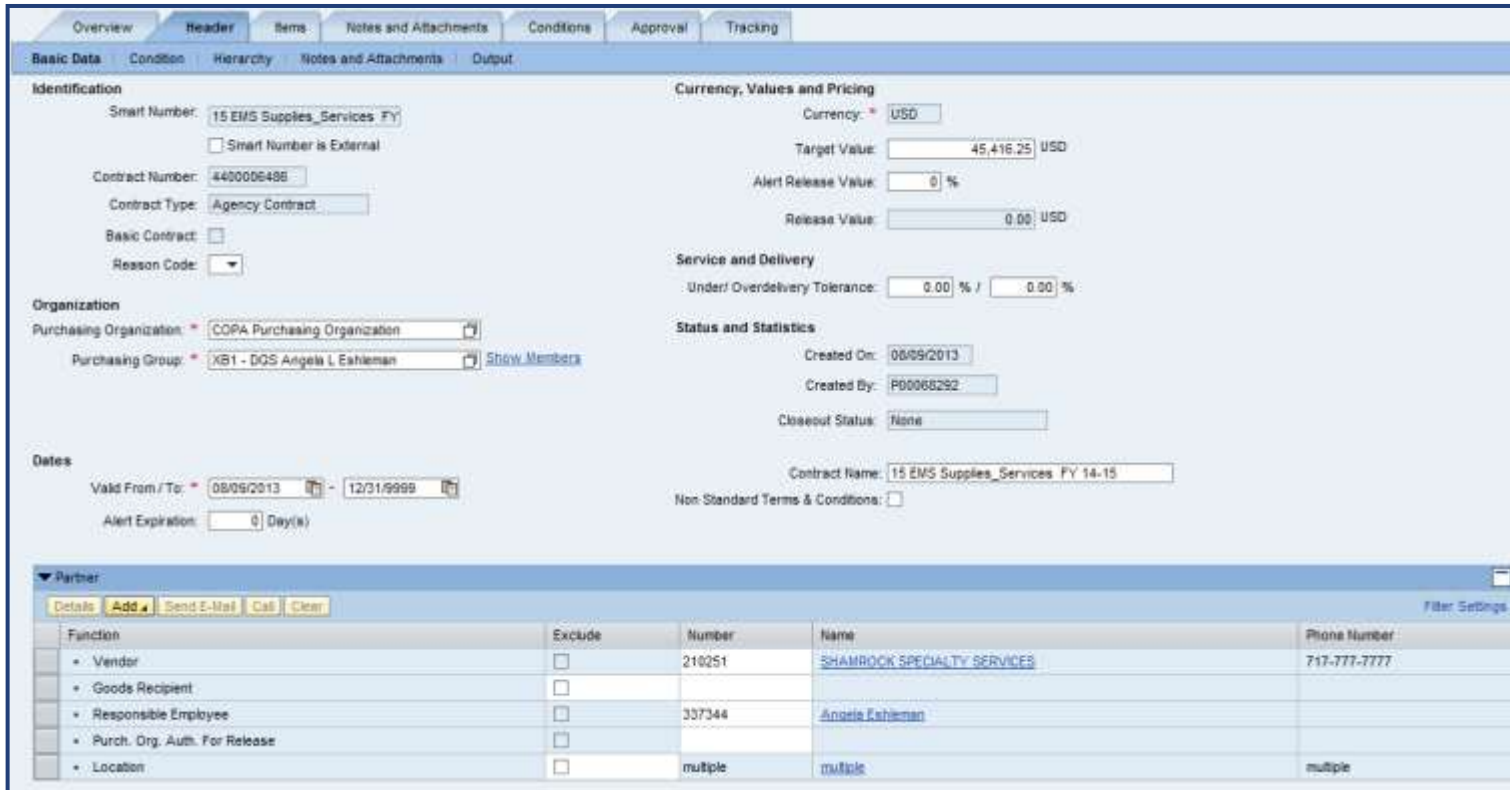
Identification Currency, Values and Pricing

Smart Number: 15 EMS Supplies_Services FY Currency: *

- The Header Tab consists of the following sub-tabs:
 - Basic Data
 - Condition
 - Hierarchy
 - Notes and Attachments
 - Output

Editing the Contract

Header Tab - Basic Data Sub-tab



The screenshot shows the 'Header' tab with the 'Basic Data' sub-tab selected. The interface is divided into several sections for data entry:

- Identification:** Smart Number (15 EMS Supplies_Services_FY), Smart Number is External (checkbox), Contract Number (4400005486), Contract Type (Agency Contract), Basic Contract (checkbox), Reason Code (dropdown).
- Organization:** Purchasing Organization (COPA Purchasing Organization), Purchasing Group (X81 - DQS Angela L. Eshleman, with a 'Show Members' link).
- Dates:** Valid From / To (08/09/2013 - 12/31/9999), Alert Expiration (0 Day(s)).
- Currency, Values and Pricing:** Currency (USD), Target Value (45,416.25 USD), Alert Release Value (0 %), Release Value (0.00 USD).
- Service and Delivery:** Under/Overdelivery Tolerance (0.00 % / 0.00 %).
- Status and Statistics:** Created On (08/09/2013), Created By (P00068292), Closeout Status (None), Contract Name (15 EMS Supplies_Services_FY 14-15), Non-Standard Terms & Conditions (checkbox).

At the bottom, there is a 'Partner' section with a table listing roles and associated information:

Function	Exclude	Number	Name	Phone Number
• Vendor	<input type="checkbox"/>	210251	SHAMROCK SPECIALTY SERVICES	717-777-7777
• Goods Recipient	<input type="checkbox"/>			
• Responsible Employee	<input type="checkbox"/>	337344	Angela Eshleman	
• Purch. Org. Auth. For Release	<input type="checkbox"/>			
• Location	<input type="checkbox"/>	multiple	multiple	multiple

- Review the defaulted information for accuracy and completeness
 - Make edits to any information, if necessary
 - Complete any open fields, as applicable

Editing the Contract

Header Tab - Basic Data Sub-tab

Dates

Valid From / To: * 01/02/2014 - 01/02/2015

Alert Expiration: 120 Day(s)

- An Alert Expiration can be set for the Validity Period. This Alert Expiration will send out a notification to the Responsible Employee when set.

Currency, Values and Pricing

Currency: * USD

Target Value: 100,000.00 USD

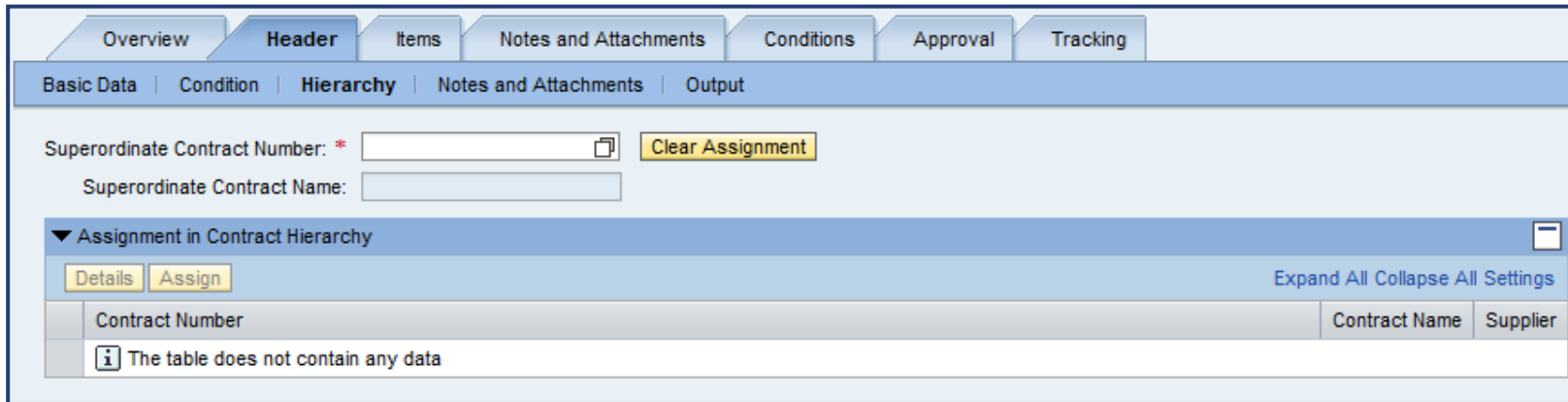
Alert Release Value: 25 %

Release Value: 0.00 USD

- A release alert can be set by a percentage of the Target Value of a Contract. This Alert Release Value will send out a notification to the Responsible Employee when set.

Editing the Contract

Header Tab - Hierarchy Sub-tab



The screenshot shows a web interface for editing a contract. The top navigation bar includes tabs: Overview, Header (selected), Items, Notes and Attachments, Conditions, Approval, and Tracking. Below this, the 'Header' tab is active, and the 'Hierarchy' sub-tab is selected. The sub-tab contains the following elements:

- Basic Data | Condition | Hierarchy | Notes and Attachments | Output** (sub-navigation)
- Superordinate Contract Number:** A text input field with a red asterisk, a document icon, and a **Clear Assignment** button.
- Superordinate Contract Name:** A text input field.
- Assignment in Contract Hierarchy** (expandable section):
 - Buttons: **Details** and **Assign**.
 - Links: [Expand All](#), [Collapse All](#), and [Settings](#).
 - Table headers: **Contract Number**, **Contract Name**, and **Supplier**.
 - Message: **The table does not contain any data** (indicated by an information icon).

- The Hierarchy sub-tab is used by DGS to link statewide contracts together in a hierarchical structure

Editing the Contract

Header Tab - Notes and Attachments Sub-tab

Change Agency Contract 4400013442

Read Only Close Release Save Check Print Preview Delete Related Links

Contract Number 4400013442 Smart Number CKA RFx Demo 1-2-14 Contract Type Agency Contract Status Saved Supplier [171430 CENVEO CORPORATION](#)
Contract Owner [703389 Cynthia Anderson](#)

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

Basic Data Condition Hierarchy **Notes and Attachments** Output

Here, you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes

Clear Filter Settings

Category	Description
Header Text	-Empty-
Internal Note	-Empty-
Vendor Text	-Empty-
Encumbrance Information	-Empty-
Insurance Information	-Empty-
Release Order Text	-Empty-

▼ Attachments

Add Attachment Edit Description Versioning Delete Filter Settings

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Legal Document	Terms & Conditions	Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	46	SRMRFC	01/02/2014
Legal Document	Responses Report	Responses Report	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	36	SRMRFC	01/02/2014
Legal Document	Reviewers Check List	Reviewers Check List	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	htm	23	SRMRFC	01/02/2014
Standard Attachment	Bid Specs for Emergency Medical Supplies	Bid Specs for Emergency Medical Supplies.docx	1		<input type="checkbox"/>	<input type="checkbox"/>	docx	18	P00446880	01/02/2014

- As needed, add any other header level text or attachments

Editing the Contract

Items Tab – Item Overview

Change Agency Contract 4400013442

Read Only | Close | Release | Save | Check | Print Preview | Delete | Related Links

Contract Number 4400013442 Smart Number CKA RFx Demo 1-2-14 Contract Type Agency Contract Status Saved Supplier 171430 CENVEO CORPORATION
Contract Owner 703389 Cynthia Anderson

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

▼ Items

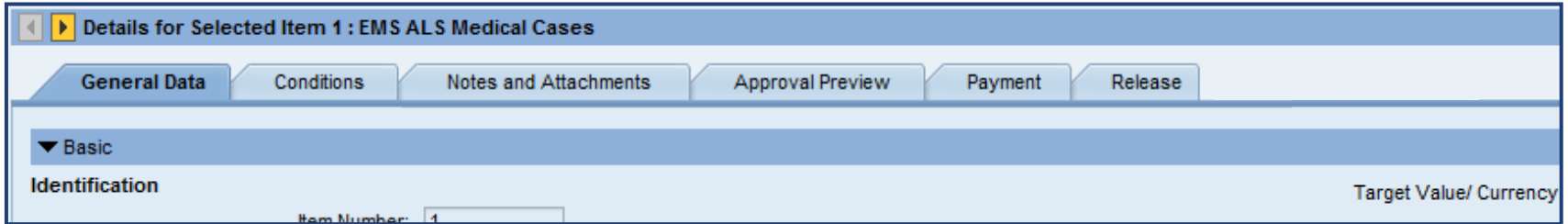
Details | Select | Add Item | Exercise Option | Copy | Paste | Duplicate | Delete | Filter Settings

Line Number	Item Category	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Price Per	Price Unit	Reference Item Number
1	Normal	1		EMT ALS Medical Cases	42171915	20.000		EA	2,995.00	149.75	USD	1	EA	0
2	Normal	2		Rescue Blankets	42171701	150.000		EA	3,787.50	25.25	USD	1	EA	0
3	Normal	3		Emergency Stretcher	42171611	20.000		EA	1,215.00	60.75	USD	1	EA	0
	Normal ▼					0.000			0.00	0.00	USD	0		0000000000
	Normal ▼					0.000			0.00	0.00	USD	0		0000000000
	Normal ▼					0.000			0.00	0.00	USD	0		0000000000
	Normal ▼					0.000			0.00	0.00	USD	0		0000000000
	Normal ▼					0.000			0.00	0.00	USD	0		0000000000
	Normal ▼					0.000			0.00	0.00	USD	0		0000000000
	Normal ▼					0.000			0.00	0.00	USD	0		0000000000

- Select the DETAILS button to view the details of each line item
- Review the defaulted information for accuracy and completeness
 - If necessary, make edits to any incorrect information

Editing the Contract

Items Tab - Details



Details for Selected Item 1 : EMS ALS Medical Cases

General Data Conditions Notes and Attachments Approval Preview Payment Release

▼ Basic

Identification

Item Number: 1

Target Value/ Currency

- The Items Tab consists of the following sub-tabs:
 - General Data
 - Conditions
 - Notes and Attachments
 - Approval Preview
 - Payment
 - Releases

Editing the Contract

Items Tab - General Data Sub-tab

Details for Selected Item 1 : EMS ALS Medical Cases

General Data | Conditions | Notes and Attachments | Approval Preview | Payment | Release

▼ Basic

Identification

Item Number:

Item Type:

Item Category: *

Product ID:

Description:

Product Category: * ☐ EMS RESCUE CASES

Reference Item Number: *

Target Value/ Currency:

Target Quantity/ Unit: EA ☐

Price: USD per: EA

Tax Code:

Further Properties

Supplier Product Number:

Release Quantity: EA

Release Value: USD

Under/ Overdelivery Tolerance: % / %

Status and Statistics

Status:

Closeout Status: ☐

▼ Partner

Details Add Send E-Mail Call Clear Filter Settings

Function	Exclude	Number	Name	Phone Number
▪ Goods Recipient	<input type="checkbox"/>			
▪ Location	<input type="checkbox"/>	73	DGS	717-787-5996

- Review the defaulted information for accuracy and completeness

Editing the Contract

Item Tab – Conditions Sub-tab

Details for Selected Item 3 : Emergency Stretcher

General Data **Conditions** Notes and Attachments Approval Preview Payment Release

▼ Conditions Filter Settings

Add Condition Scales Duplicate Remove

Condition Type	Sca...	Amount	Currency	Price Per	Price ...	Valid From	Location	Valid To	Location Name
Price(Contract/Bid)		60.75	USD	1	EA	01/02/2014		01/02/2015	

- Review the information on the Conditions sub-tab for accuracy

Editing the Contract

Item Tab – Notes and Attachments Sub-tab

Details for Selected Item 3 : Emergency Stretcher

General Data Conditions **Notes and Attachments** Approval Preview Payment Release

▼ Notes Filter Settings

[Clear](#)

Category	Description
Item Text	Must meet weight requirements
Internal Note	-Empty-
Vendor Text	-Empty-
Material PO Text	-Empty-
Shipping Instructions	-Empty-

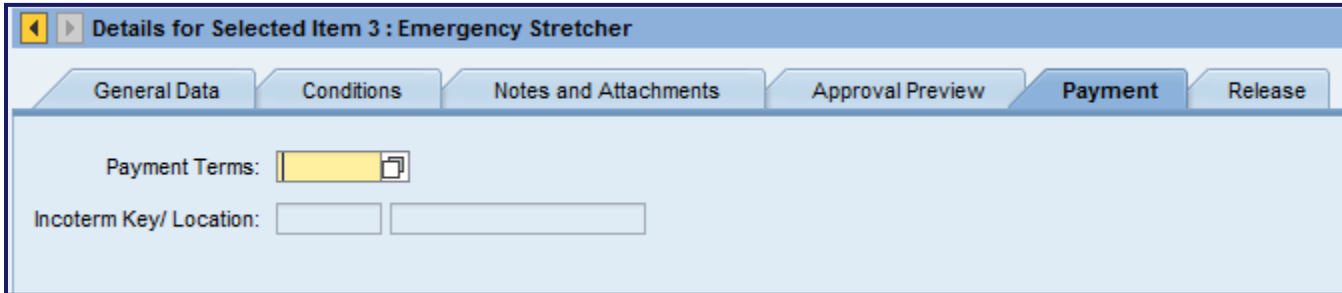
▼ Attachments Filter Settings

[Add Attachment](#) [Edit Description](#) [Versioning](#) [Delete](#)

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
<div><i>i</i></div> The table does not contain any data										


- As needed, add any other item level text

Editing the Contract



Details for Selected Item 3 : Emergency Stretcher

General Data Conditions Notes and Attachments Approval Preview **Payment** Release

Payment Terms: 

Incoterm Key/ Location:

- The Payment Terms and Incoterm fields will populate based off of the supplier information
 - Terms must be in compliance with DGS procurement policies

Editing the Contract

Release Sub-tab

Details for Selected Item 1 : EM!

General Data Conditions Notes and Attachments Approval Preview Payment **Release**

Filter Setting

Document	Document Number	Name	Item Number	Date	Quantity	Unit	Net Value	Currency	Purchasing Organization	Plant	Status

- The Release sub-tab displays procurement documents which have been released against the selected line item

Editing the Contract

Notes and Attachment Tab

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

▼ Notes Filter Settings

[Add](#) [Clear](#)

Assigned To	Category	Text Preview
Document Header	Header Text	The Commonwealth of PA is seeking certain Emergency Medi...
Document Header	Internal Note	EMS supplies and services are needed in the event of a d...

▼ Attachments Filter Settings

[Add Attachment](#) [Edit Description](#) [Versioning](#) [Delete](#)

Assigned To	Category	Description	File Name	Version	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Standard Attachment	EMS RESCUE BLANKET SPECIFICATIONS	EMS Rescue Blanket Specifications.docx	1	<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Document Header	Standard Attachment	EMERGENCY HOSPITAL SERVICES REQUIREMENTS	Emergency Hospital Services Requirements.docx	1	<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Document Header	Standard Attachment	EMS ALS MEDICAL CASE SPECIFICATIONS	EMS ALS Medical Case Specifications.docx	1	<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Document Header	Standard Attachment	EMS EMERGENCY STRETCHER SPECIFICATIONS	EMS Emergency Stretcher Specifications.docx	1	<input type="checkbox"/>	<input type="checkbox"/>	docx	13	P00068292	08/09/2013
Document Header	Legal Document	Terms and Conditions	Document	1	<input type="checkbox"/>	<input type="checkbox"/>	pdf	46	SRMRFC	08/09/2013

- The primary Notes and Attachments tab is a collection of all notes and attachments from the entire document
 - The “Assigned To” column identifies whether they are at the Document Header or Item level
 - Additions or edits to any notes or attachments may be made on this tab

Editing the Contract

Conditions Tab

<div>Overview</div> <div>Header</div> <div>Items</div> <div>Notes and Attachments</div> <div>Conditions</div> <div>Approval</div> <div>Tracking</div>										
Content Area										
▼ Conditions Overview										
<div>Add Condition</div> <div>Scales</div> <div>Copy Clipboard</div> <div>Paste Clipboard</div> <div>Delete Clipboard</div> <div>Remove</div> <div>Expand All Collapse All Filter Settings</div>										
Level	Condition Type	Scales	Amount	Currency	Price per	Price Unit	Location	Valid From	Valid To	Location Name
▪	Price(Contract/Bid)		149.75	USD	1	EA		01/02/2014	01/02/2015	
▼ Item 2 - Rescue Blankets										
▪	Price(Contract/Bid)		25.25	USD	1	EA		01/02/2014	01/02/2015	
▼ Item 3 - Emergency Stretcher										
▪	Price(Contract/Bid)		60.75	USD	1	EA		01/02/2014	01/02/2015	

- Conditions tab displays information on the pricing for each line item and the validity period for that condition

Editing the Contract

Approval Tab

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

Current Status: Header Approval Note:

Current Process Step:

Currently Processed By:

Approval Process Data: [Download as XML](#)

Header Item

Header Approval Status

[Remove Approver](#) [Settings](#)

Sequence	Process Step	Status	Processor	Received On	Processed On	Forwarded By
▪ 001	SRM Contract Approval	Open (No Decision Made)	Terri Heimbach; Sheri Phillips; Anne Rung			
▪ 002	SRM Contract Approval	Open (No Decision Made)	Gary Ankabrandt; Charles Anderson; SRM9937-Alice Miller; Joshua Harman			
▪ 003	SRM Contract Approval	Open (No Decision Made)	Robert Mülle; Tammy Ruth; SRM1495-Sherise Mcmichael; Amy Elliott			

- The Approval tab is functional in SRM 7.0 and shows the levels of approval the procurement document must achieve

Editing the Contract

Tracking Tab

Change Agency Contract 4400013442

Read Only Close Release Save Check Print Preview Delete Related Links

Contract Number 4400013442 Smart Number CKA RFx Demo 1-2-14 Contract Type Agency Contract Status Saved Supplier 171430 CENVEO CORPORATION Contract Owner 703389 Cynthia Anderson

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

History View: United States Dollar Filter Settings

Document	Name	Document Number	Back-End Document Number	Status	Date	Value	Currency
Shopping Cart	CKA Test Cart for Demo 1-2-14	11512654		Approved	01/02/2014	11,050.00	USD
RFx	CKA RFx Demo 1-2-14	6100027171		Published	01/02/2014	N/A	N/A
RFx Response	CKA RFx Demo 1-2-14	6500068158		Accepted	01/02/2014	0.00	USD
Central Contract	CKA RFx Demo 1-2-14	4400013442		Saved	01/02/2014	100,000.00	USD

Status System Status Created > Complete > Held

Version Overview Detail Compare

Version	Document/Version Type	Created On	Changed On	Document Name
1	Active Document	01/02/2014 14:23:45	01/02/2014 15:19:54	CKA RFx Demo 1-2-14

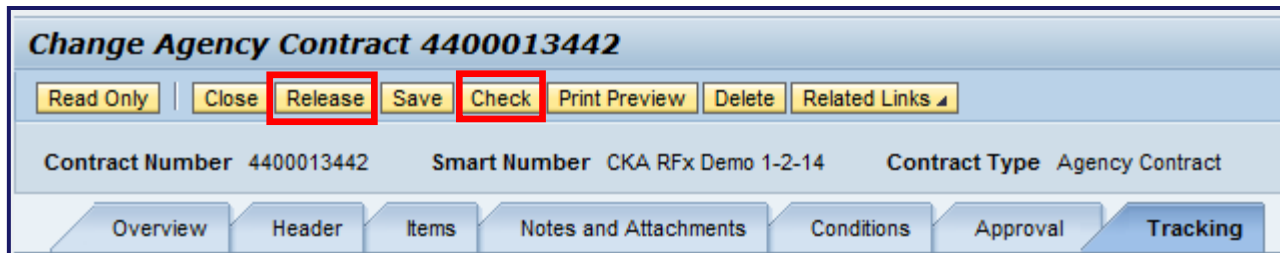
Change Documents Changed Since Changed From/To Search Expand All Collapse All Hide Query Filter Settings

Header/Item Attribute	Old Value	New Value	Changed By	Changed On	Changed At	Version
Header						

- The Tracking tab is comprised of various types of information such as:
 - Document History
 - Status
 - Versions
 - Change Documents

Editing the Contract

Release the Contract



Change Agency Contract 4400013442

Read Only | Close | **Release** | Save | **Check** | Print Preview | Delete | Related Links ▾

Contract Number 4400013442 Smart Number CKA RFX Demo 1-2-14 Contract Type Agency Contract

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

- Select the CHECK button to view and resolve any errors
- Select the RELEASE button to send the Contract document through approval workflow

[illegible]

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

Editing the Contract

Editing a Released Contract

Display Agency Contract 4400013442

[Close](#) [Release](#) [Edit](#) [Copy](#) [Check](#) [Renew](#) [Print Preview](#) [Related Links](#)

Contract Number: 4400013442 Smart Number: CKA RFx Demo 1-2-14 Contract Type: Agency Contract Status: Released Supplier: [171430 CENVEO CORPO](#)
Contract Owner: [703389 Cynthia Anderson](#)

[Overview](#) [Header](#) [Items](#) [Notes and Attachments](#) [Conditions](#) [Approval](#) [Tracking](#)

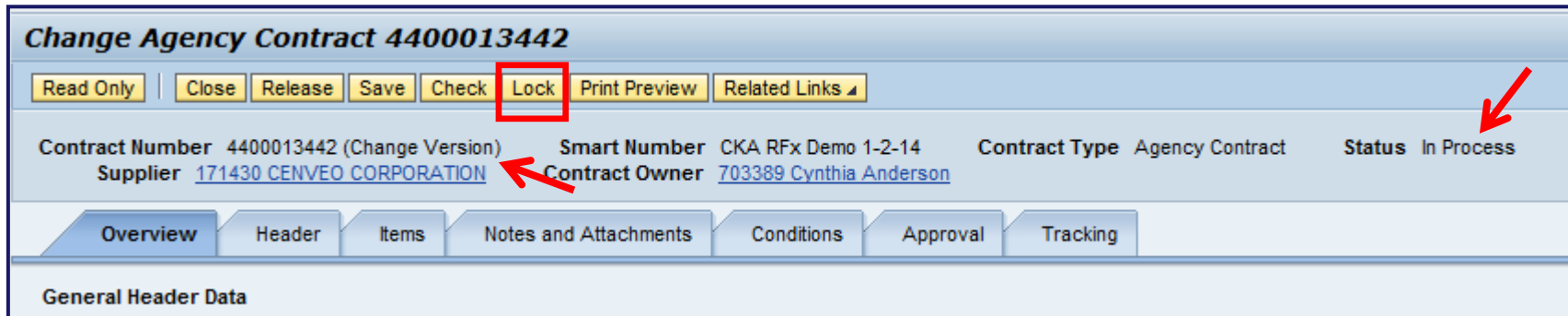
General Header Data

Contract Number:	<input type="text" value="4400013442"/>	Contract Owner:	<input type="text" value="703389"/> Cynthia Anderson
Smart Number:	<input type="text" value="CKA RFx Demo 1-2-14"/>	Target Value/ Currency:	<input type="text" value="100,000.00"/> <input type="text" value="USD"/>
	<input type="checkbox"/> Smart Number is External	Release Value:	<input type="text" value="0.00"/> <input type="text" value="USD"/>
Contract Description:	<input type="text" value="CKA Demo Contract 1-1-14"/>		
Supplier: *	<input type="text" value="171430"/> CENVEO CORPORATION		
Valid From / To: *	<input type="text" value="01/02/2014"/> - <input type="text" value="01/02/2015"/>		
Purchasing Organization: *	<input type="text" value="COPA Purchasing Organization"/>		
Purchasing Group: *	<input type="text" value="DGS Central Purchase Purchasing Group"/> Show Members		

- Select the EDIT button to begin making changes

Editing the Contract

Editing a Released Contract



Change Agency Contract 4400013442

Read Only | Close Release Save Check **Lock** Print Preview Related Links ▾

Contract Number 4400013442 (Change Version) Smart Number CKA RFx Demo 1-2-14 Contract Type Agency Contract Status In Process
Supplier [171430 CENVEO CORPORATION](#) Contract Owner [703389 Cynthia Anderson](#)

Overview Header Items Notes and Attachments Conditions Approval Tracking

General Header Data

- Post-Release, there are several differences in the document while it is in change mode
 - The Contract Number displays “(Change Version)” next to it
 - The Status is *In Process*
 - The LOCK button is now available

Editing the Contract

Editing a Released Contract

Change Agency Contract 4400013442

Read Only | Close | **Release** | Save | Check | Lock | Print Preview | Related Links ▾

Contract Number 4400013442 (Change Version) Smart Number CKA RFx Demo 1-2-14 Contract Type Agency Contract Status In Process
Supplier [171430 CENVEO CORPORATION](#) Contract Owner [703389 Cynthia Anderson](#)

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

General Header Data

- After the change(s) have been made, select the RELEASE button
 - Depending upon the significance of the change(s), the document may:
 - Follow approval workflow, or
 - Re-release automatically

Summary

This completes your lesson, you should now be able to:

- Understand the special features of SRM 7.0
- Redistribute work to other sourcing professionals
- Source a requirement
- Create and edit solicitation documents
- Create and edit legal documents in Doc Builder
- Publish solicitations in the Supplier Portal
- Open, evaluate, and award responses to solicitations
- Create and edit contracts

Knowledge Check

1. How many steps are in the Carry Out Sourcing Wizard?
 - a. 3
 - b. 4
 - c. 5

Knowledge Check

2. Are you required to add the mandatory Questions to an RFX?
 - a. Yes
 - b. No

Knowledge Check

3. After accepting a supplier's bid response, are you able to reverse the acceptance?
 - a. Yes
 - b. No

Knowledge Check

4. The Approval Tab will be used in SRM 7.0.
 - a. True
 - b. False

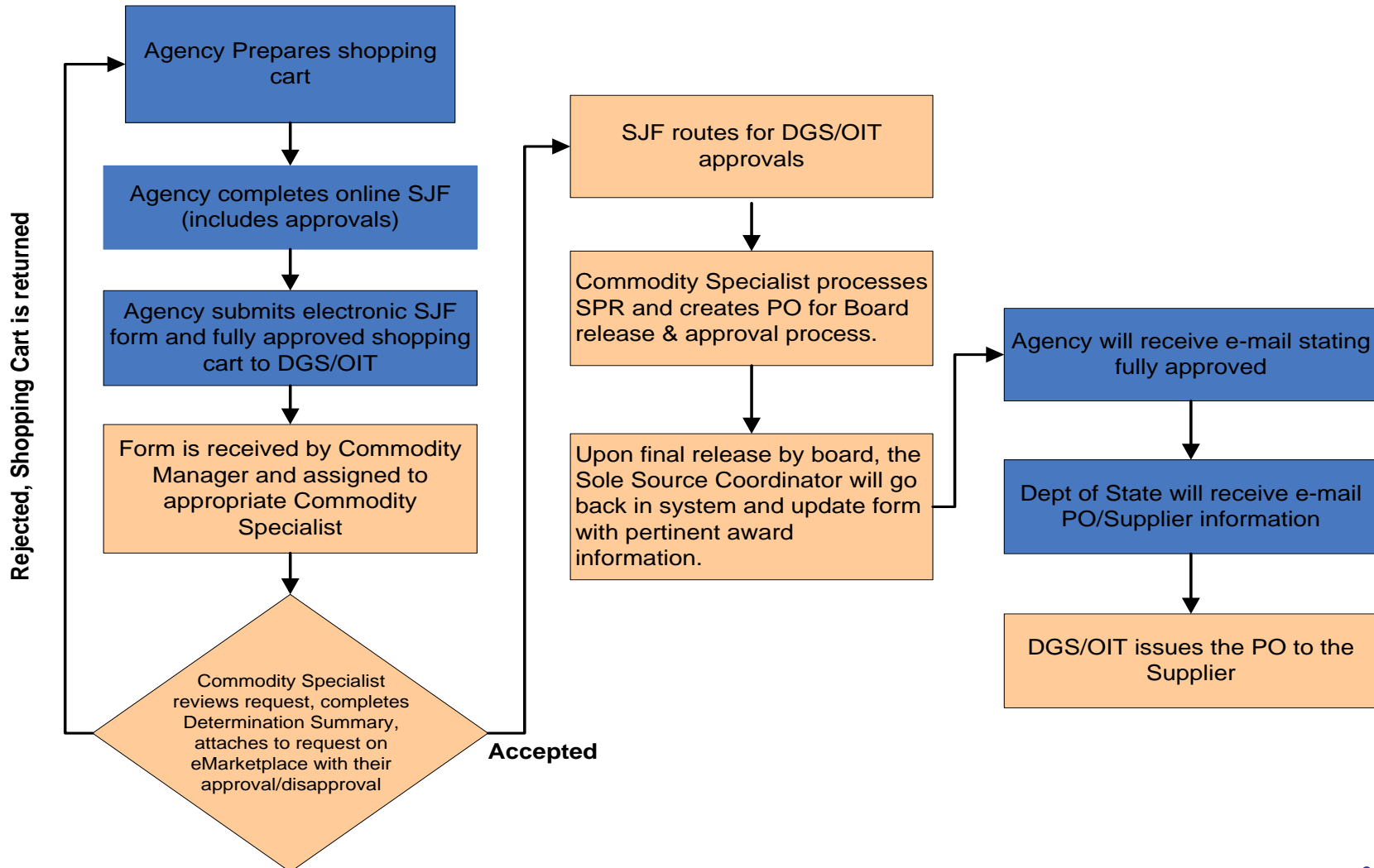
Reference Material

Sole Source Flowcharts

(Appendix A & B)

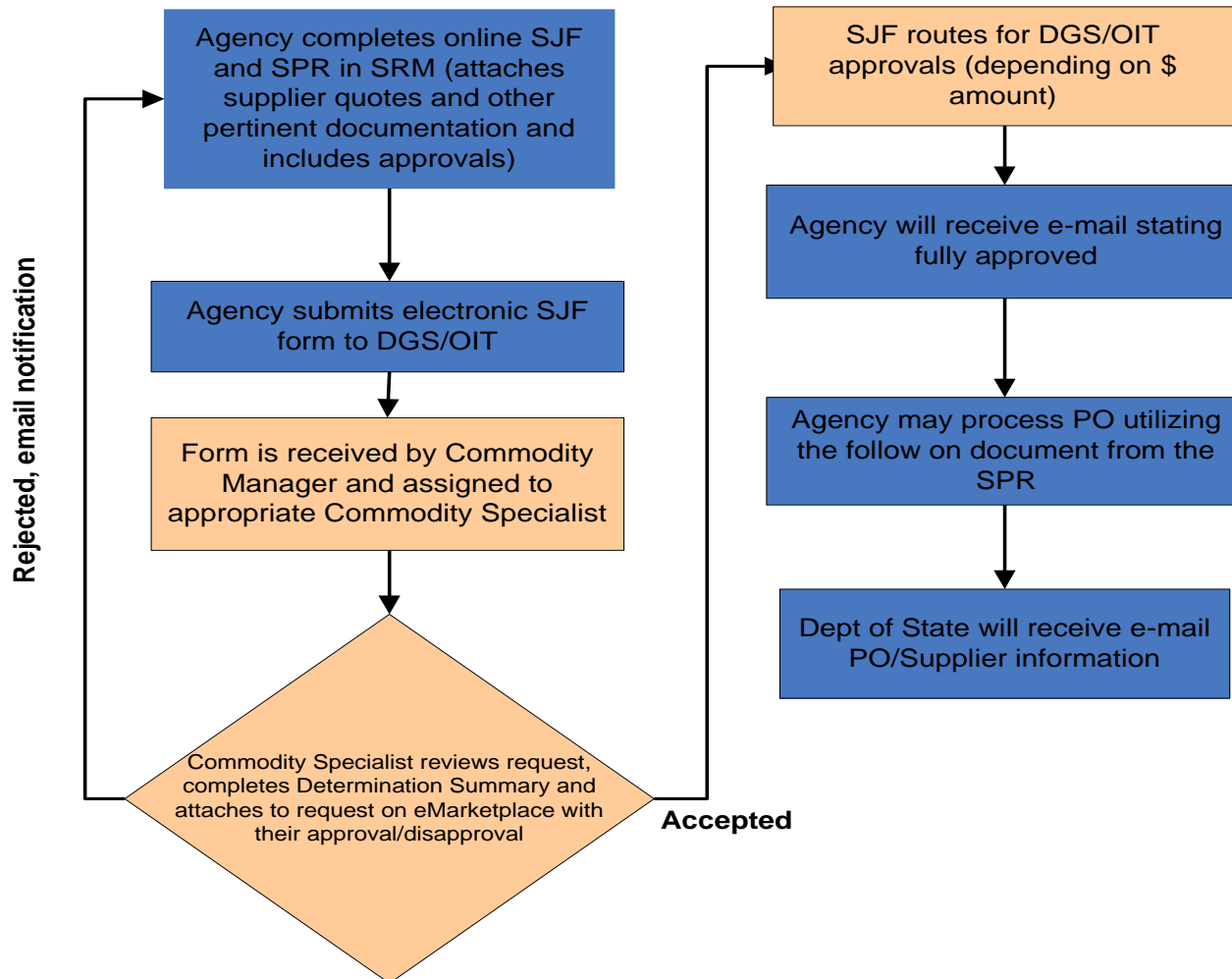
Appendix A: Sole Source Material

Sole Source Materials Process Map



Appendix B: Sole Source Service

Sole Source Services Process Map




Appendix C:

SU3 - Maintain User's Data

SU3 – Maintain User's Data

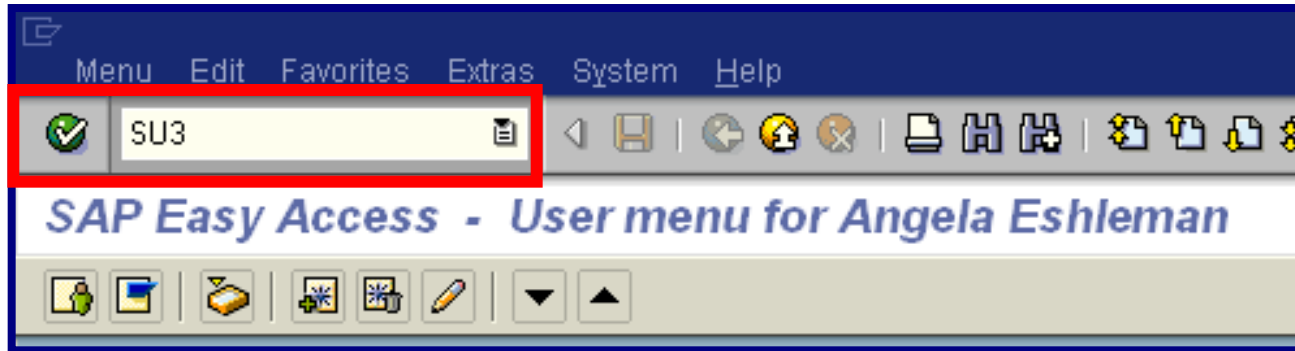
Maintain User Company Data

	ORIGINAL BID - Invitation For Bid P00068292 05/29/2007 12:50:38		Page
	BID Effective Date:	Bid Invitation Nu 6100000695	
Issuing Office: Angela Eshleman Commonwealth of Pennsylvania US	Supplier Name/Address: Your SAP Vendor Number with us: _____ <input type="checkbox"/> Disadvantaged business as defined by STD-203		
Please Return Quotation to: Commonwealth of Pennsylvania US	Type of Security furnished if required: <input type="checkbox"/> Certified bank cahier's check <input type="checkbox"/> Irrevocable letter of credit <input type="checkbox"/> Certificate of deposit <input type="checkbox"/> Other as specified by bid <input type="checkbox"/> Bond - If annual bond: What is the name of the principal on the bond?	Return Bid End Bid End 00:00:0	
Please Deliver To:	Procurement Contact: Buyer: Angela Eshleman Phone: Fax:	Expirat Contract applica Deliver See its	

- When a user's "company" address is incorrect or incomplete, it is reflected on their procurement documents
 - The user must update their contact information in SAP R/3

SU3 - Maintain User's Data

Maintain User Profile



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

SU3 - Maintain User's Data

Maintain User Profile

User: P00068292
Last changed by: P00478432 09/23/2005 15:30:01 Status: Saved

Address Defaults Parameters

Person

Title:
 Last name: Eshleman
 First name: Angela
 Acad. title:
 Format: Angela Eshleman
 Function:
 Department: General Services
 Room no.: Floor: Building:

Communication

Language: English
 Telephone no.: -
 Fax: -
 Internet mail: aeshleman@pa.lcl
 Comm. type: Remote Mail

Assign other company address... **Assign new company address...**

Company

Commonwealth of Pennsylvania / /


- On the Address tab, enter or edit the data in the applicable data fields such as Name, Department, Telephone no., and Fax
 - Note that data such as Internet mail (workflow) cannot be changed
- Select the *ASSIGN OTHER COMPANY ADDRESS* button

SU3 - Maintain User's Data


Maintain User Profile

Address number (1) 167 Entries found

Restrictions



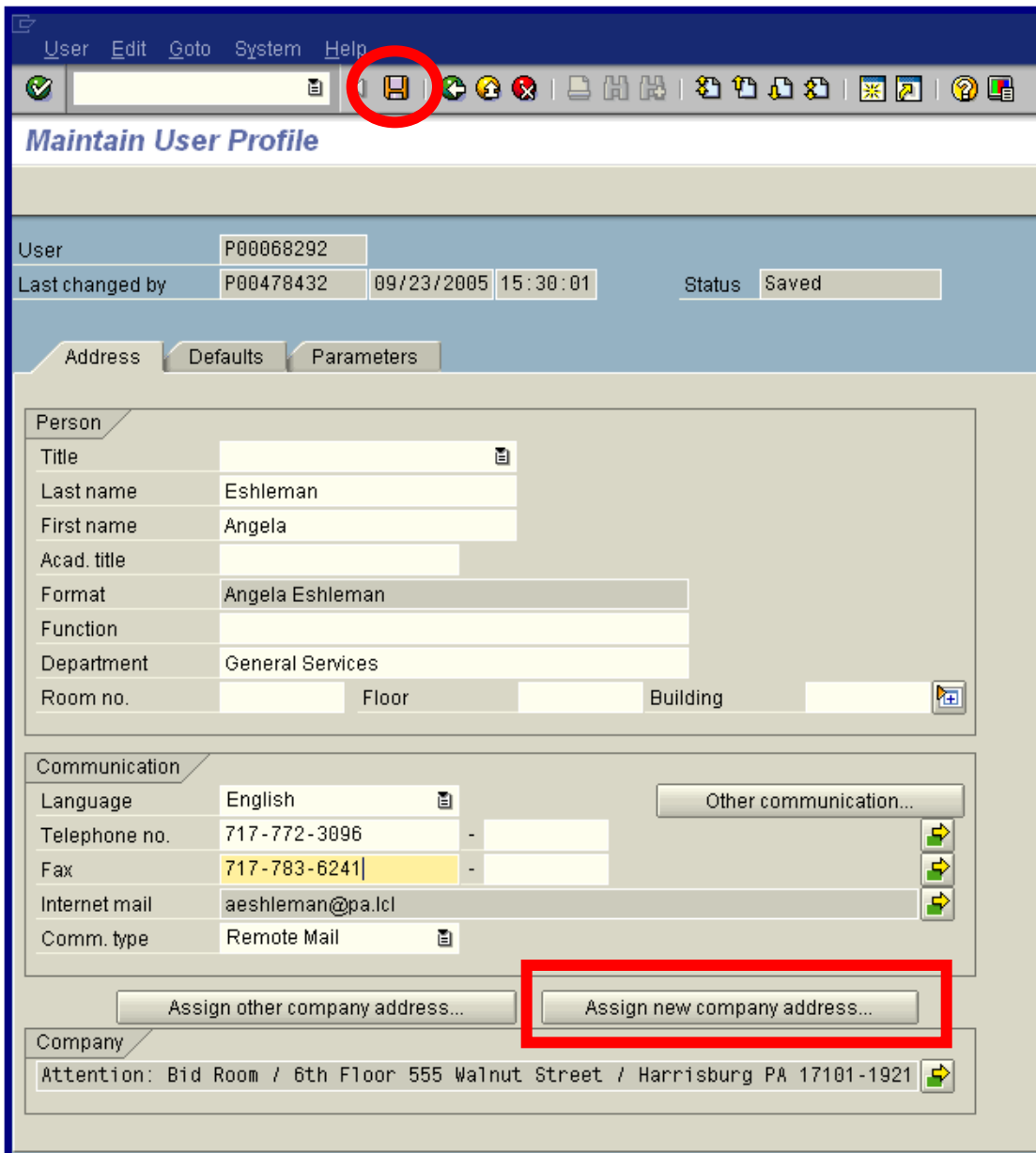




Cl.	Company in user's address	Name	Name 2	City
110	50 OVERLOOK DRIVE	SCI-Fayette		
110	AGRICULTURE, CONTRACTS & PROCUREMENT	Agriculture Procurement Division		Harrisburg
110	ATTENTION: BID ROOM	Attention: Bid Room	Department of General Services	Harrisburg
110	ATTN: BID ROOM	Attention: Bid Room	Department of General Services	Harrisburg
110	ATTN: BID ROOM/RM 414 NORTH O.B./HAR 17125	Syline Shingara		Harrisburg
110	ATTORNEY GENERAL	attorney general		harrisburg
110	BID ROOM (FORUM PLACE)	Attention: Bid Room		Harrisburg
110	BRIAN REINOEHL	Brian Reinoehl		Harrisburg
110	BUREAU OF ADMINISTRATIVE & FINANCIAL SVCS.	Bureau of Administrative & Financial Svc	Room 824, Health & Welfare Building	Harrisburg

- Search through the existing addresses and choose the appropriate entry, if available
- Select the green checkmark to copy the address into the user's profile

SU3 - Maintain User's Data



User: P00068292
Last changed by: P00478432 09/23/2005 15:30:01 Status: Saved

Address Defaults Parameters

Person

Title
Last name: Eshleman
First name: Angela
Acad. title
Format: Angela Eshleman
Function
Department: General Services
Room no. Floor Building

Communication

Language: English
Telephone no.: 717-772-3096
Fax: 717-783-6241
Internet mail: aeshleman@pa.lcl
Comm. type: Remote Mail

Assign other company address... Assign new company address...

Company

Attention: Bid Room / 6th Floor 555 Walnut Street / Harrisburg PA 17101-1921

- All information is now updated on the User Profile
 - Select the SAVE icon to save the updates
- Note that if no existing address was found, select the *ASSIGN NEW COMPANY ADDRESS* button

SU3 - Maintain User's Data

Maintain User Profile

Address maintenance: Display "SAP user company addresses"

Name	
Title	
Name	New Company Name
	Forum Place 6th Floor

Search terms	
Search term 1/2	

Street address	
Street/House number	Walnut Street 555
Postal code/City	17105 Harrisburg
Country	US USA Region PA Pennsylvania
Time zone	EST

PO box address	
PO Box	
Postal Code	
Company postal code	

Communication	
Language	English
Telephone	-
Fax	-
E-mail	

- Enter the new address to be used, as shown in the example
- Select the green checkmark to copy the new address into the user profile
- Do **not** put a telephone number or fax number into the "New Company Address"

SU3 - Maintain User's Data

Maintain User Profile

- When the *ASSIGN OTHER COMPANY ADDRESS* button is used, the updated company address will replicate from R/3 to SRM within the same day
- When the *ASSIGN NEW COMPANY ADDRESS* button is used, the new company address will not replicate from R/3 to SRM until the next morning



pennsylvania

DEPARTMENT OF GENERAL SERVICES



Supplier
Relationship
Management

SRM 7.0

**Creating & Maintaining
Solicitations (RFx) &
Contracts**

Thank you!