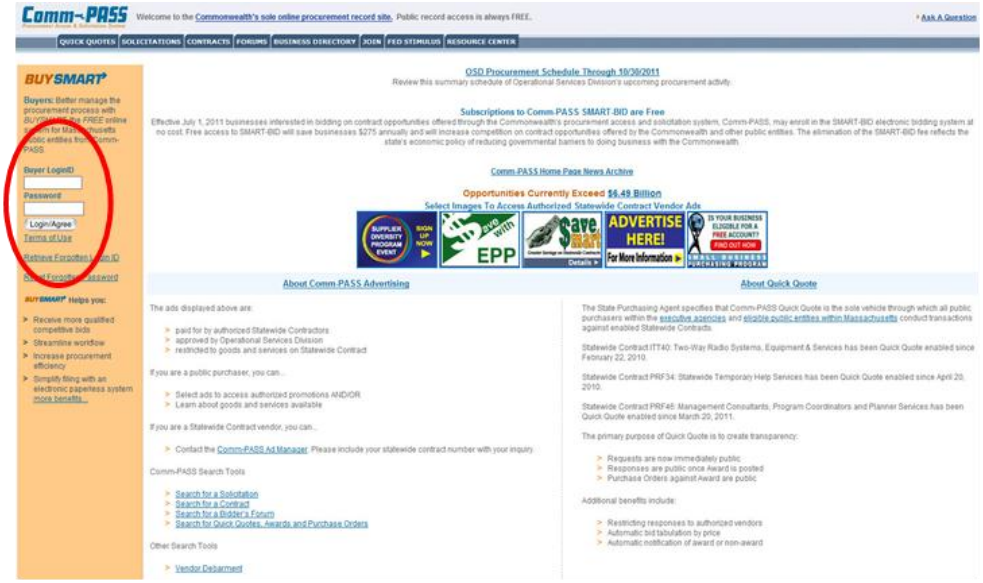
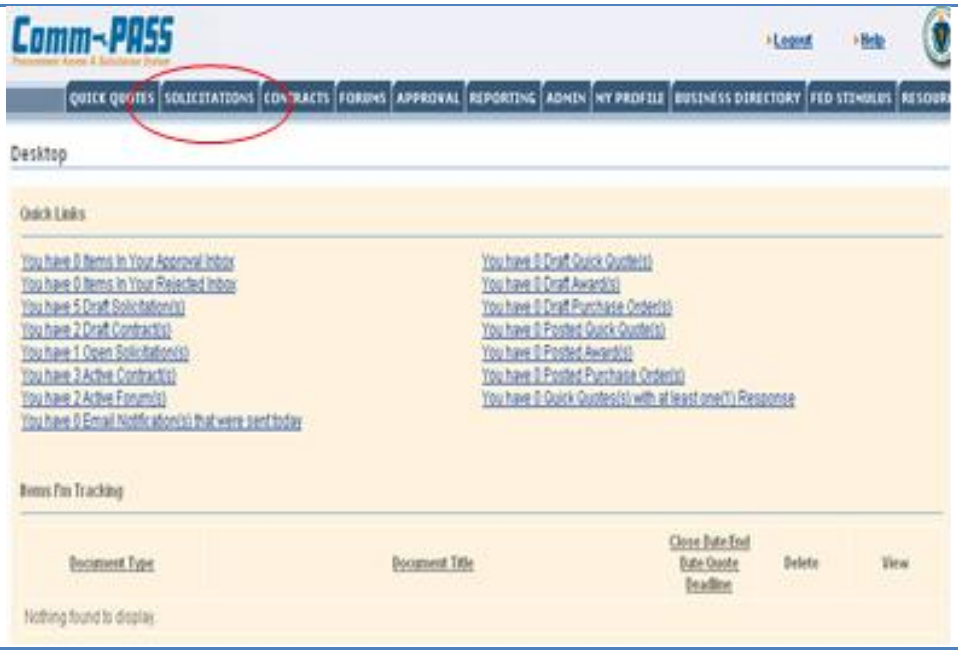
OPERATIONAL SERVICES DIVISION

# Job Aid:
## How to Create a Solicitation

- *Please Note:* You must have a BuySmart Subscription and be logged in to perform this task.

| Step | Screenshot | Directions |
|---|---|---|
| 1 |  | Log into your BuySmart account. |
| 2 |  | Select the **Solicitations** tab. |

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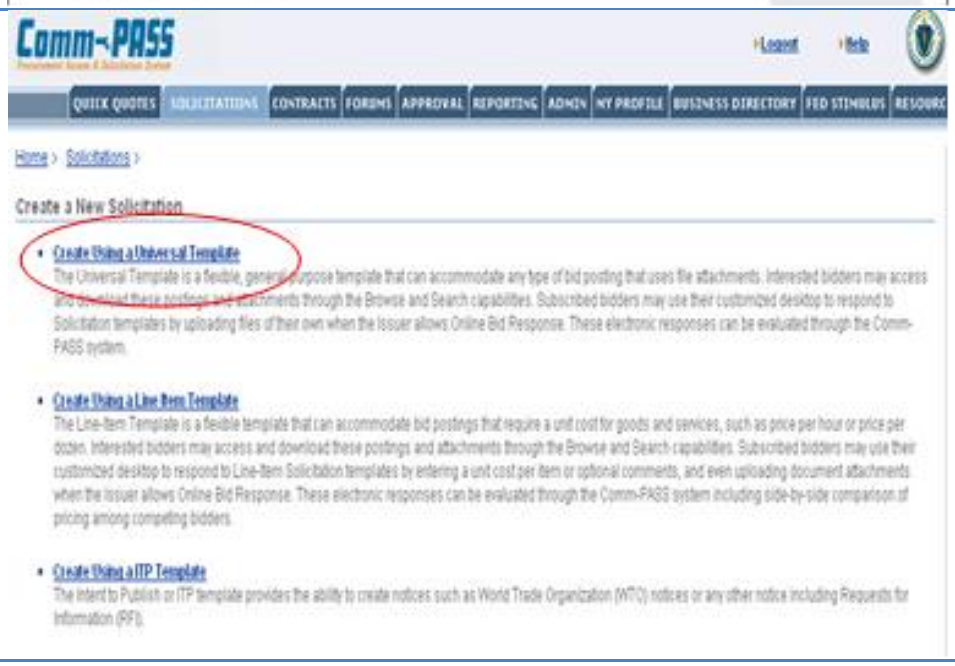
| Step | Screenshot | Directions |
|---|---|---|
| 3 | | Select the **Create a New Solicitation** link. |
| 4 |  | Select **Create Using a Universal Template** link.<br><br>This will bring you to a 9-step Wizard for creating a solicitation.<br><br>*Use **Line Item** Template link for multiple line solicitations (see Job Aid: How to Create a Line Item Solicitation)*<br><br>*Use **ITP Template** link for Announcements, but not to post the actual bid or solicitation documents.* |

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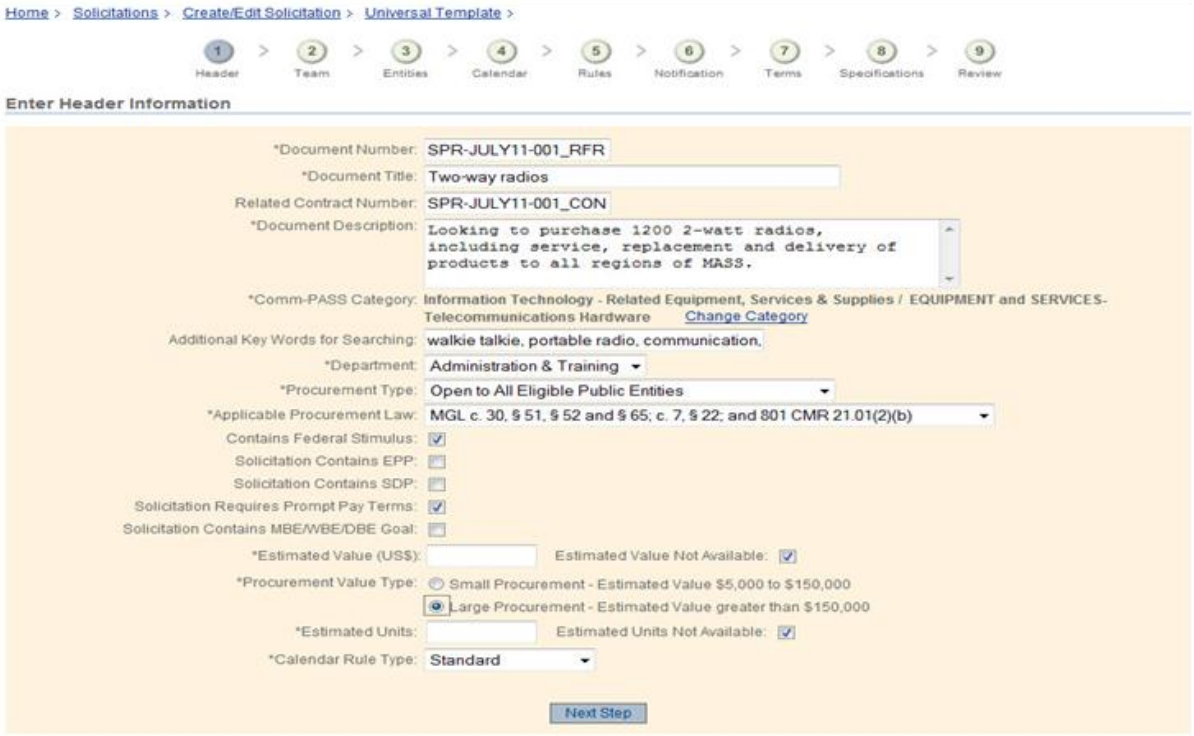
| Step | Screenshot | Directions |
|---|---|---|




**5**

**Header**

- Provide the following information in each name field
- All fields with an (*) are required

**Document Number –** Once the record number is created, you can search by this number. This number is case and space sensitive. Best practice is to use a consistent naming convention.
*For Example:* City/Department_DATE/FY_NUMBER_SOL **=** SPR_JULY11_001_SOL

**Document Title**

**Related Contract Number –** This is required for Executive Departments (and considered best practice for all other users). This piece of information assists a user trying to locate an associated record through the Search and Browse/View capabilities.

**Document Description –** Provide a brief overview of the procurement (enough information to give bidders an idea of what you are looking for, which will allow them to decide to continue reading and determine their ability to provide the good/service(s)). Do not put all the specifications of the procurement here. The detailed description should be in the RFR.

**Comm-PASS Category** – Choose the category and subcategory you want this solicitation to display in when users are browsing by selecting the Checkbox icon that best defines your procurement. Vendors with similar Category/Subcategory selection will be notified when this contract is posted.

**Additional Key Words –** For ARRA funding, you must provide the following words (ARRA, Federal Stimulus, XXX). In addition, Executive Department Key Words must contain at least the Contract Manager's name and commonly used terms for commodities and services sought in this field.

**Department –** Defaults to your department (if you are a user for multiple departments, select the appropriate department).

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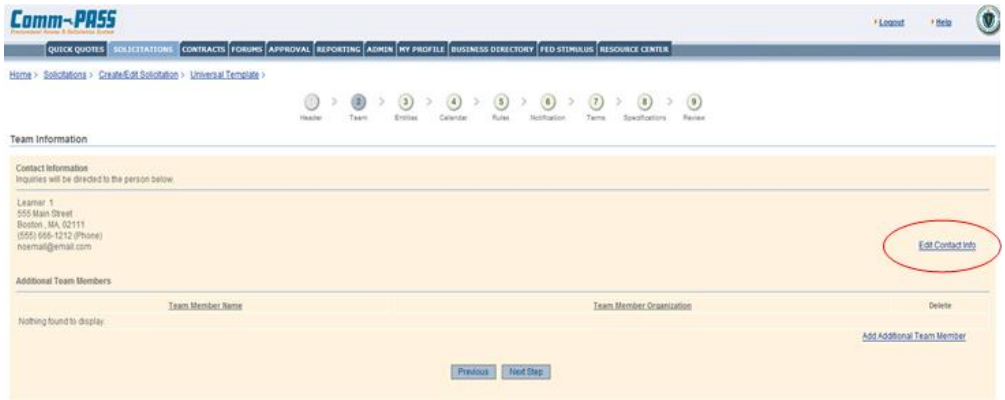
| Step | Screenshot | Directions |
|---|---|---|
| | | **Procurement Type –** Users have four options for this selection 1) *Open for Use Under Separate Contract Execution* 2) *Open to All Eligible Public Entities* (**for use by Operational Services Division or designated agency or department ONLY**) 3) *Restricted to Use by Defined Entities* 4) *Restricted to Use by Issuing Entity Only*<br><br>**Applicable Procurement Law –** Select the law that governs your procurement.<br><br>**Contains Federal Stimulus –** Indicates this procurement contains ARRA Funding.<br><br>**Solicitation Contains EPP –** This checkbox should be selected to alert bidders that your specifications require environmentally preferable products or services.<br><br>**Solicitation Contains SDP –** This checkbox should be selected to alert bidders your specification requires participation in the Supplier Diversity Program.<br><br>**Solicitation Requires Prompt Pay Terms** – This checkbox should be selected to alert bidders that your specifications requires Prompt Payment Discount.<br><br>**Solicitation Contains MBE/WBE/DBE Goals** – This checkbox should be selected if specifications require participation of certified MBE/WBE/DBE certified bidders.<br><br>**Estimated Value/Estimated Units** – Executive Department entries must contain at least one non-zero value in the Estimated Value or Units field. These estimates help interested bidders determine whether or not they can meet the procurement scope.<br><br>**Procurement Value Type –** Executive Departments must select procurement value for small procurements $10k -$150k or large procurements over $150k (*this value is not displayed to the bidders,* but must be selected to proceed).<br><br>**Calendar Rule Type – 1)** *Standard*: No bids accepted after Closing or during contract term; 2) *Open Enrollment:* If a contract results, the Issuer may accept additional bids during one or more defined periods not exceeding contract end; 3) *Rolling Enrollment:* Issuer will continuously accept bids throughout a period not exceeding the Last Submission Date. |
| **6** |  | **Team Information**<br><br>You can add additional team members by selecting the **Add Additional Team Member** link. It is best practice to only have one point of contact to ensure consistent communication. The contact information that defaults here belongs to the User and will be listed under the **Issuer(s)** tab in the posting. To change this contact information, select the **Edit Contact Info** link. |

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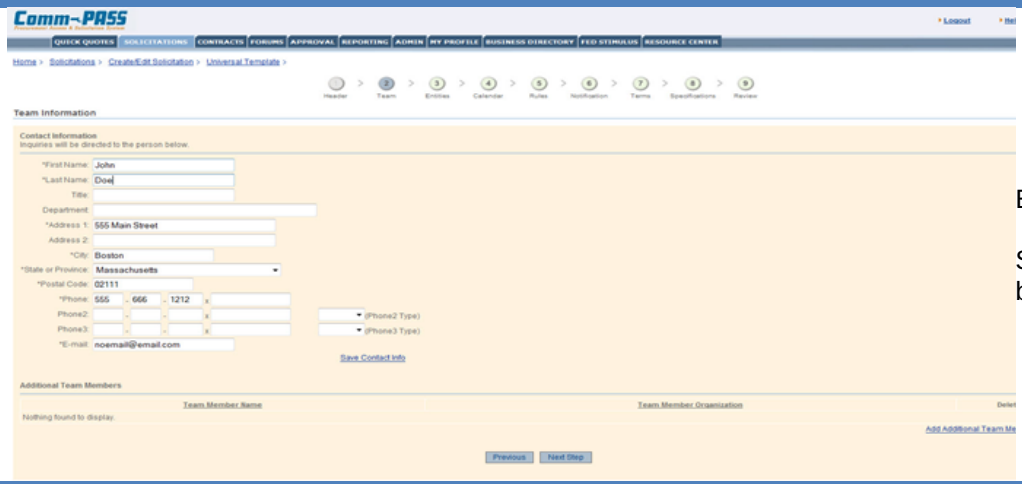
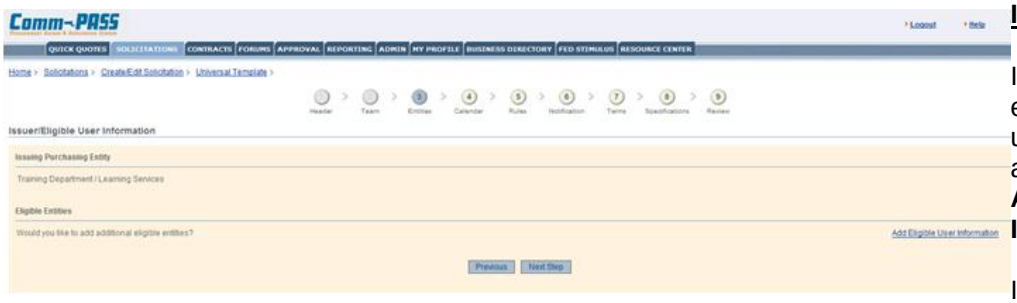
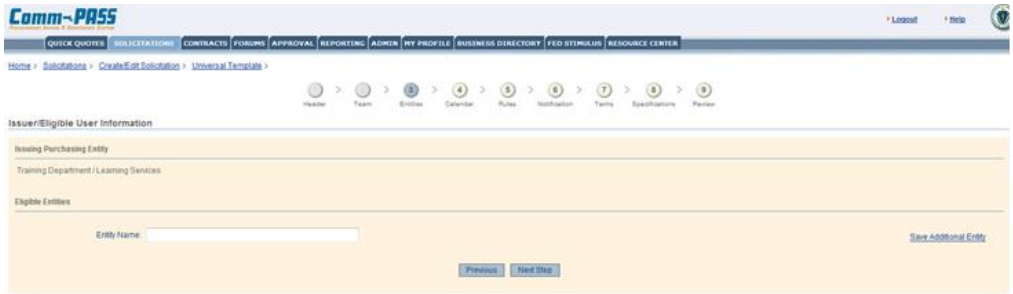
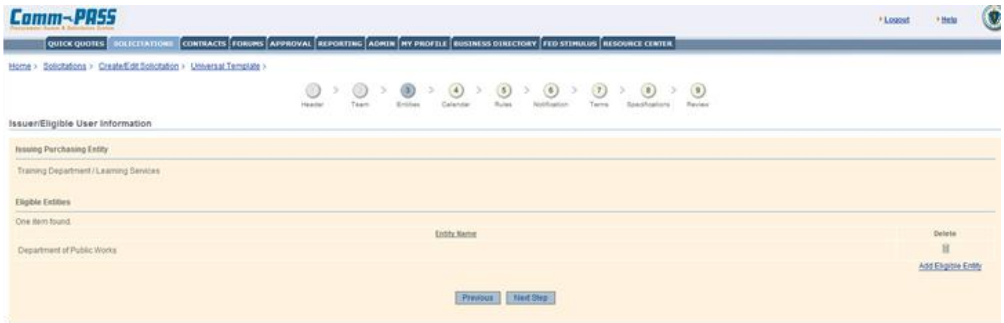
| Step | Screenshot | Directions |
|---|---|---|
| 7 |  | Enter Contact Information.<br><br>Select the **Next Step** button. |
| 8 |  | **<u>Issuer/Eligible User Information</u>**<br><br>If you want to identify other eligible entities that may use this contract, you can add them by selecting the **Add Eligible User Information** link.<br><br>If not, select **Next Step** and move onto Step 11. |
| 9 |  | Enter the Entity Name and select **Save Additional Entity** link. |
| 10 |  | You will now be able to view the Entity listed.<br><br>Select **Next Step**. |

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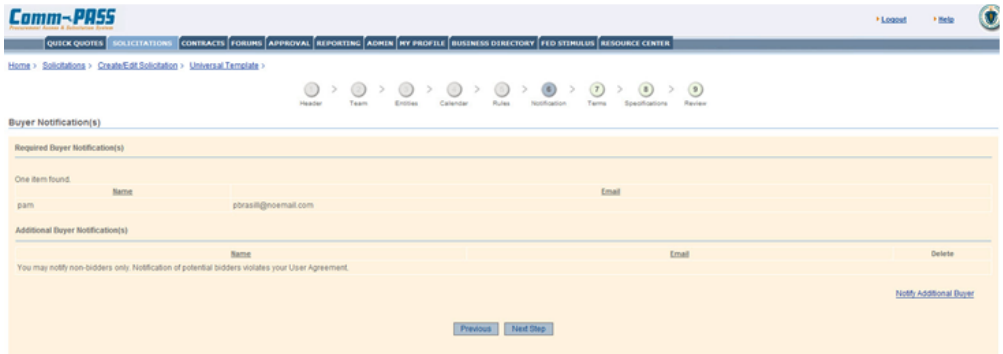
| Step | Screenshot | Directions |
|---|---|---|
| 11 | | **Calendar Rules**<br><br>Use the fields to select the day, month, year and time for this procurement. This calendar should mirror procurement timeline in the solicitation. Make sure that you are allowing for a fair, open, and competitive procurement by providing enough time for the bidders to submit an effective response. Pay special attention to AM & PM references. |
| 12 | | **Solicitation Rules**<br><br>Selecting **Allow Online Responses** is for Online Bid Submissions. The buyer must have approval by the State Purchasing Agent and training prior to using this functionality. Additionally, selecting the **Allow Single Vendor to Submit Multiple Responses** option allows the vendor to submit more than one response. Do not select this box if you are not going to allow for multiple responses. Best Practice is to not allow mulitple responses.<br><br>Select **Next Step**. |
| 13 |  | **Buyer Notification**<br><br>Required Buyer Notification will be listed at top of this screen. This information is set up by the Administrator and can not be edited. Additional Buyer Notification can be used if you need to notifiy non-bidders of the posted solicitation. DO NOT USE THIS TO NOTIFY POTENTIAL BIDDERS.<br><br>Select **Next Step**. |

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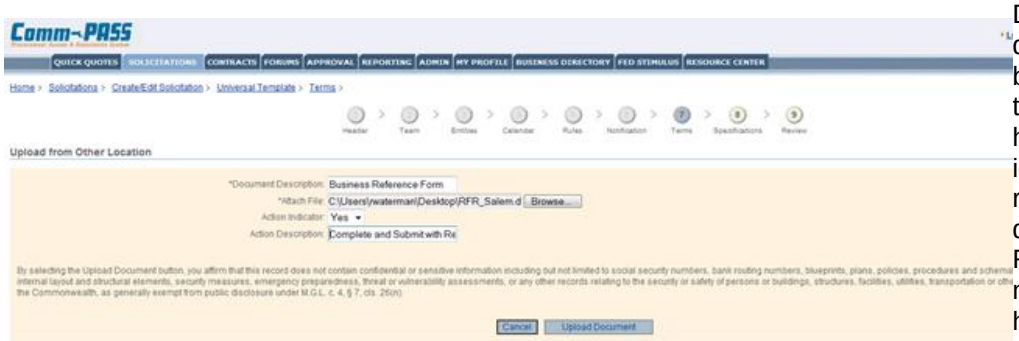
| Step | Screenshot | Directions |
|---|---|---|
| 14 | | **Terms**<br><br>At this step you will be able to view documents that are defaulted to every posting. Review to ensure that you have all required documents for this posting. If you need to upload other documents you have two options:<br>**Add Attachment for Solicitation Library** allows you to select a document for a library of documents set up by your Adminstrator.<br>**Add Attachment from Another Location** allows you to browse for the document.<br><br>If you do not need to add documents to the **Forms & Terms** tab, select **Next Step**. |
| 15 |  | When you select **Add Attachment from Another Location,** you will be able to browse for the document. You must provide a Document Description. This description provides the bidder with an idea of what the document is. You will have an opportunity to identify if the document requires action and a description of that action. Remember, the document naming convention must not have spaces/special characters or you will receive an error message.<br><br>Select the **Upload Document** button. |

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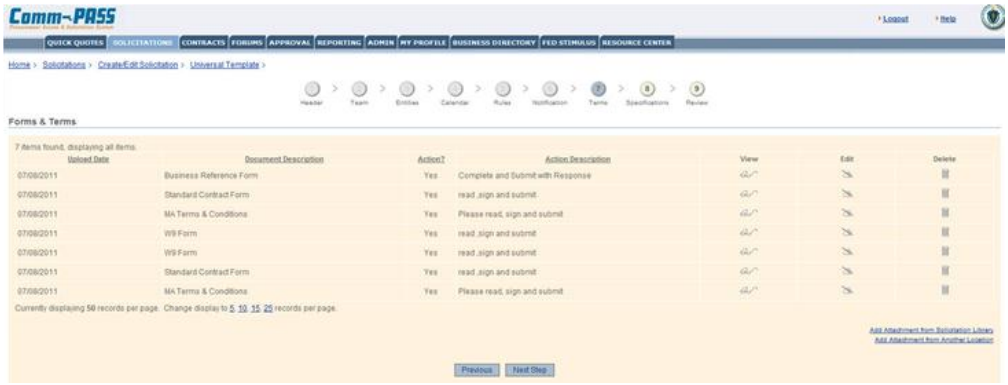
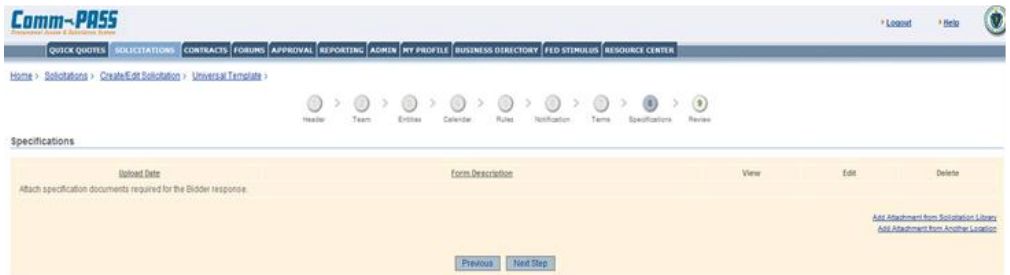
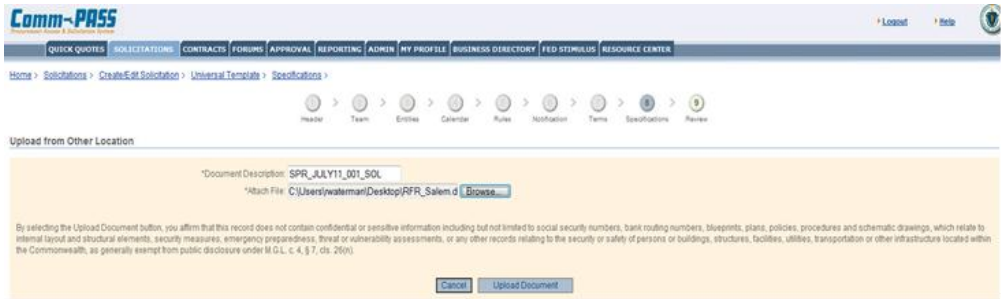
| Step | Screenshot | Directions |
|---|---|---|
| 16 |  | You will now see your document listed among the other documents.<br><br>Select **Next Step**. |
| 17 |  | **<u>Specifications</u>**<br><br>Upload your RFR or Bid Documents by selecting the appropriate link for adding an attachment. |
| 18 |  | You can name the document in the **Document Desciption** field, for example, “RFR Document,” “District Listing,” or “Attachment A.” Remember, you must use the appropriate naming convention for uploading documents.<br><br>Select **Upload Document**. |

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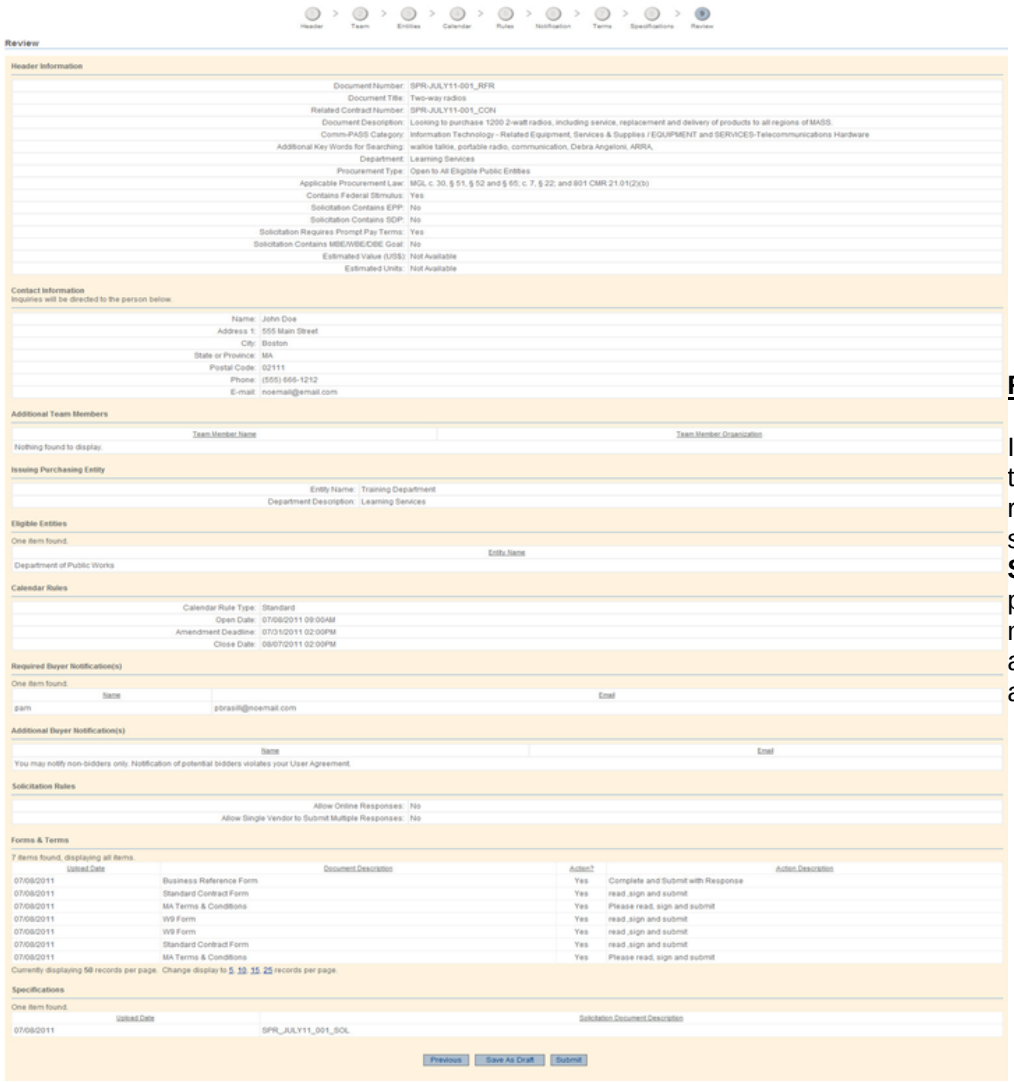
| Step | Screenshot | Directions |
|---|---|---|
| 19 | | You will see your document added and can continue to add all the necessary documents following the same steps.<br><br>Select **Next Step**. |
| 20 |  | **Review**<br><br>It is strongly recommended to **Save As Draft** and review the posting prior to submitting. One you select **Submit**, the Solicitation will post live to the site within moments unless an approval workflow is assigned to the User. |

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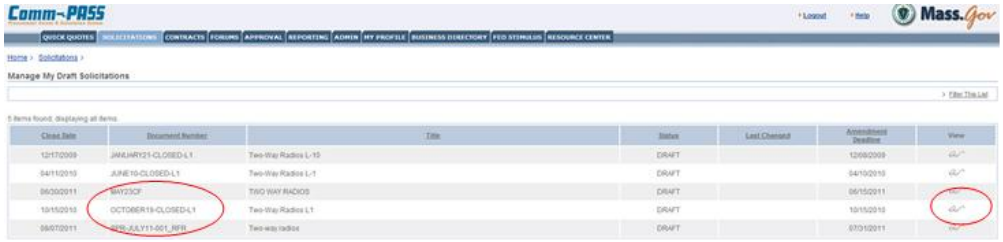
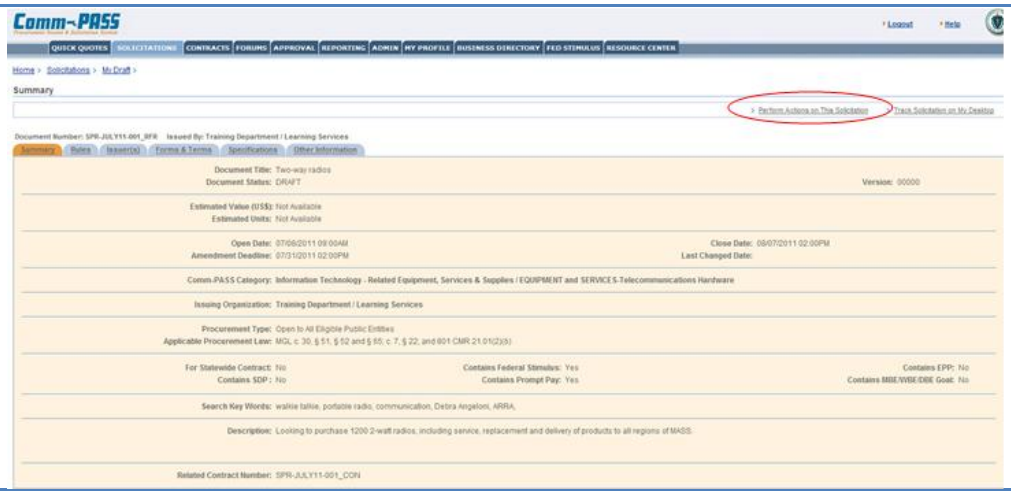
| Step | Screenshot | Directions |
|---|---|---|
| 21 | | You can access the posting by selecting the **Manage My Draft Solicitations** from the Desktop or Solicitations tab. |
| 22 |  | Select the Eyeglass icon to view the posting. |
| 23 |  | Select the **Perform Actions on This Solicitation** link when you want to view the menu options for this record. |

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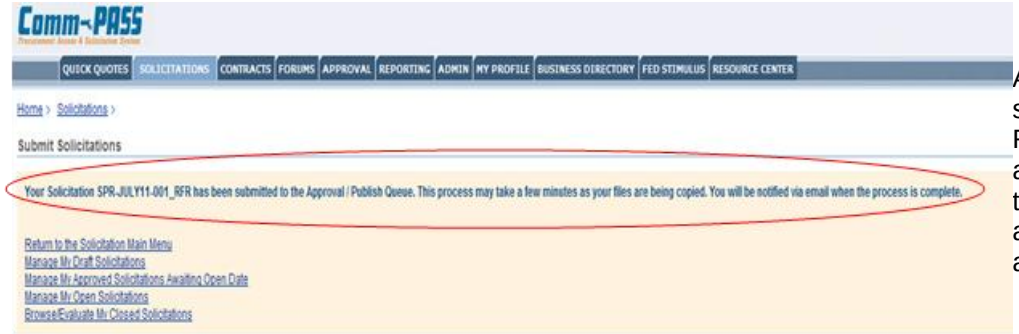
| Step | Screenshot | Directions |
|---|---|---|
| 24 | | Since the record is still a draft, there are several options available: Copy, Delete, Edit, Save or Submit.<br><br>**Copy Solicitation** – copy all of the data from the Draft solicitation to a completely new Draft solicitation<br>**Delete Solicitation** – delete the Draft Solicitation (you can not delete a submitted solicitation, you must cancel a submitted solicitation once it has been posted)<br>**Save Solicitation** –save a Draft Solicitation<br>**Submit Solicitation** – submit the Draft solicitation without viewing |
| 25 | | When you are ready to Submit from this menu or from the last step in the wizard, you will be asked to confirm the submission by selecting **Continue.** |
| 26 |  | A confirmation of the submission is displayed. Remember, if there is an approval workflow set up for the User, you will not be able to view the posting as an open solicitation. |

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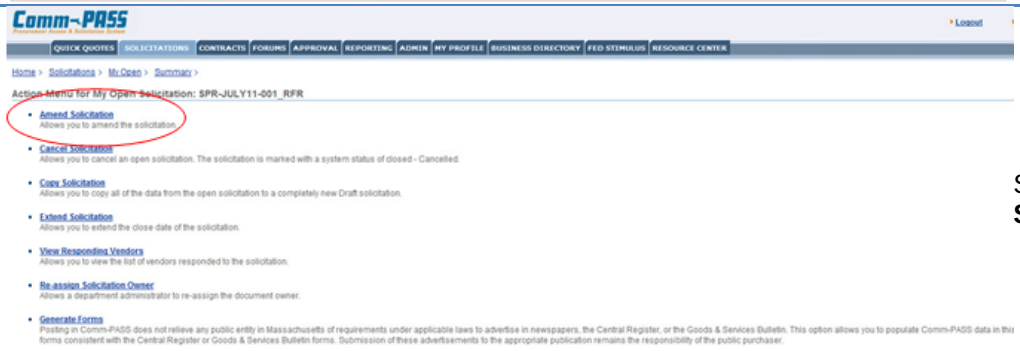
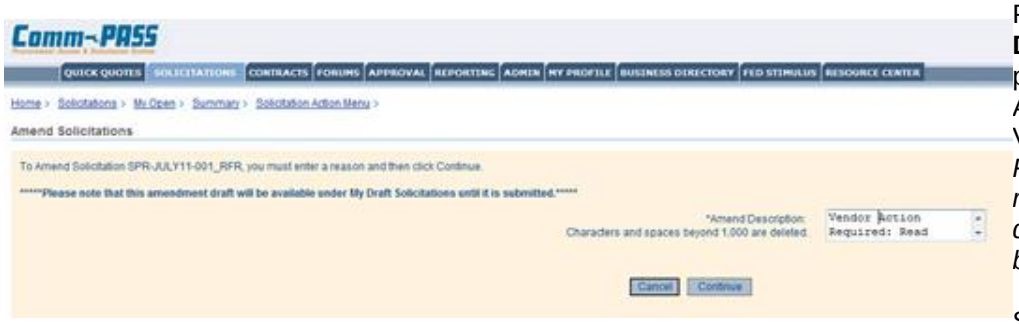
| Step | Screenshot | Directions |
|---|---|---|
| 27 | | To Amend an Open Solicitation you must locate the Open Solicitation and select the **Perform Actions on This Solicitation** link. |
| 28 |  | Select the **Amend Solicitation** link. |
| 29 |  | Provide an **Amend Description** in the field provided. Be sure to identify Action Required by the Vendor details as needed. *For example: Vendors must read section 3 of the RFR document for changes to building details…*<br><br>Select **Continue**. |

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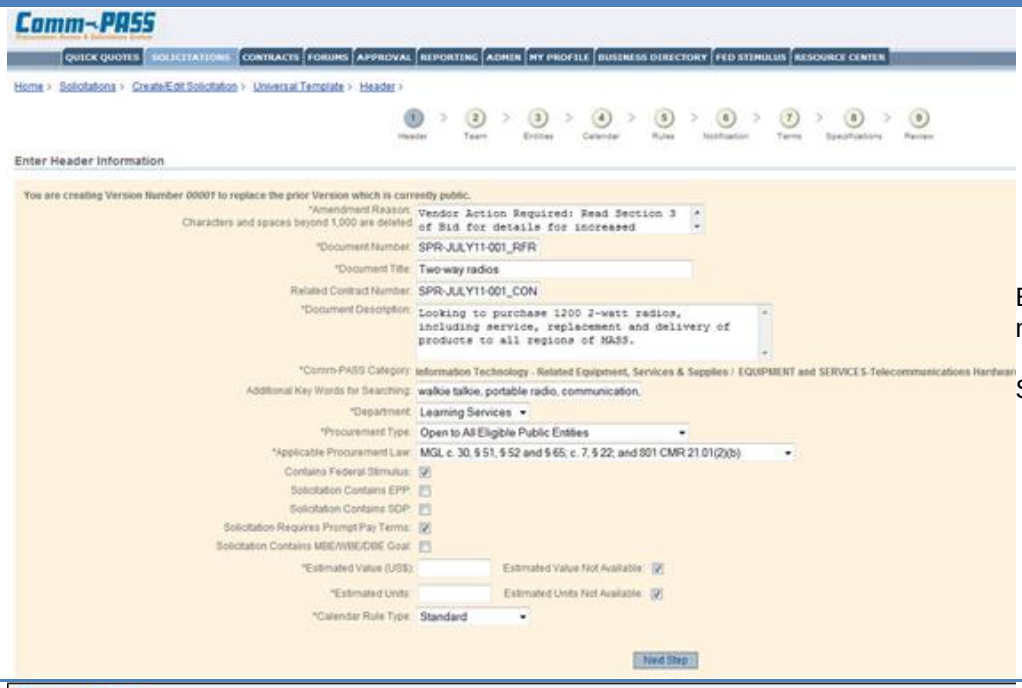
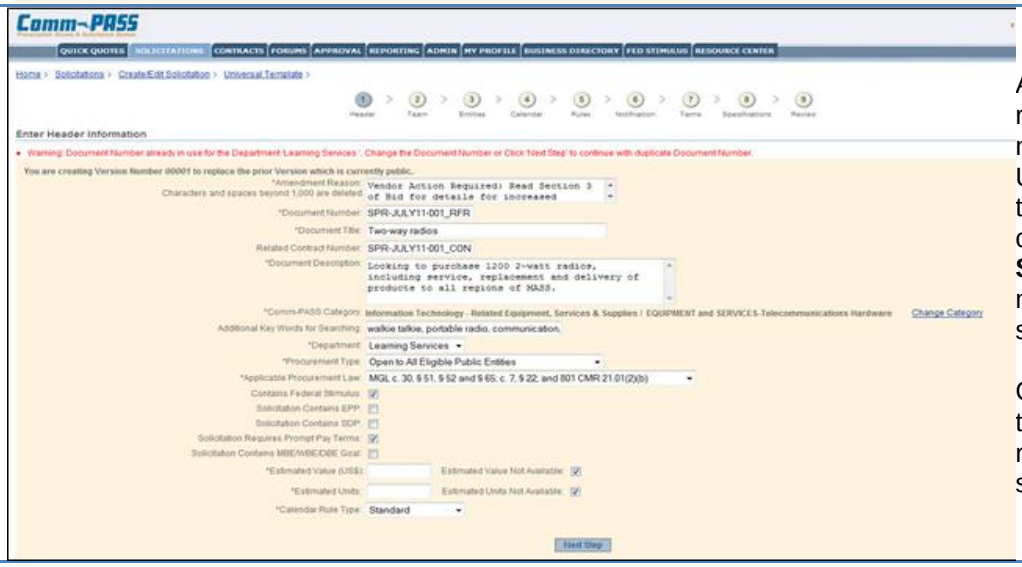
| Step | Screenshot | Directions |
|---|---|---|
| 30 |  | Edit the information as needed.<br><br>Select **Next Step**. |
| 31 |  | A **Warning** will display remind you that document number already exists. Unless you want to change the document number, continue by selecting **Next Step** and disregard the red message at the top of the screen.<br><br>Continue making your way through the wizard until you reach the Review step and select the **Submit** button. |

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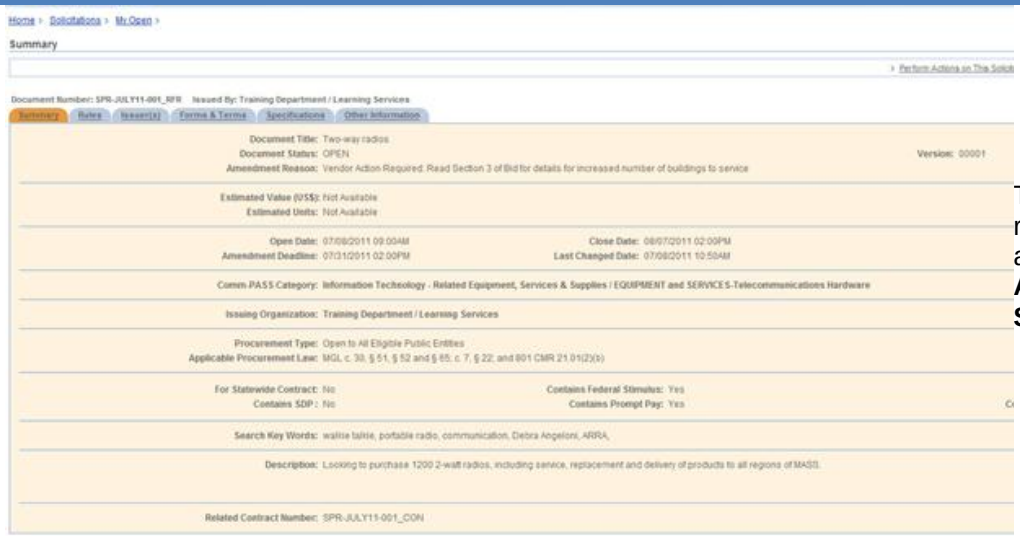
| Step | Screenshot | Directions |
|---|---|---|
| 32 |  | To Cancel a solicitation record, locate the record and select **Perform Actions on This Solicitation.** |
| 33 | | Select **Cancel Solicitation.** |
| 34 | | Choose Reason from drop down menu and Select **Continue.** |