Job Aid:
How to Create a Bid from Scratch

This Job Aid shows how to:

- Create a Bid Solicitation using the Create a Bid from Scratch option in COMMBUYS.

Of Special Note:

Bids are documents used to request price quotes and post opportunities for contracts from potential vendors (bidders) for goods or services. They are used when goods or services are not already on a statewide or departmental contract (excluding Requests for Quotation - RFQs which are part of the document). Bids can either be a one-time request for goods and services, which would turn into an open market purchase order, or they can become a Master Blanket Purchase Order (MBPO) in COMMBUYS – either a Statewide Contract (SWC) or Departmental Contract. This job aid will start at the point of creating a new bid, without a requisition. Please review the OSD Best Value Procurement Handbook for bid creation if you have any questions.

Enrollment Types:

Open Enrollment: Allows the Strategic Sourcing Services Team (SSST) to re-open the contract at any time (or at set intervals) to add new vendors. The Contract End Date should not change.

- Add vendors to an established contract
- Vendors are able to be awarded during the open enrollment period
- Bid opportunity lasts up to one year of the established contract expiration date
- Has multiple quote submission periods
- Must act as informal

Rolling Enrollment: Allows you to accept bids and review them as they come. The Contract End Date should not change.

- Has one enrollment period to award vendors to an established contract
- Bid opportunity lasts up to one year prior to the established contract expiration date
- Purchaser can award vendors anytime
- Must act as informal

- **NOTE:** You must have Basic Purchaser privileges and be logged in under the Basic Purchaser user role tab in COMMBUYS to create a bid.

<table>
<tr><th>Screenshot</th><th>Directions</th></tr>
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Step 1: Creating a New Bid

1. Click on the **Add Documents** icon to begin a new requisition.
2. Select **Bid Solicitation** from the dropdown menu.

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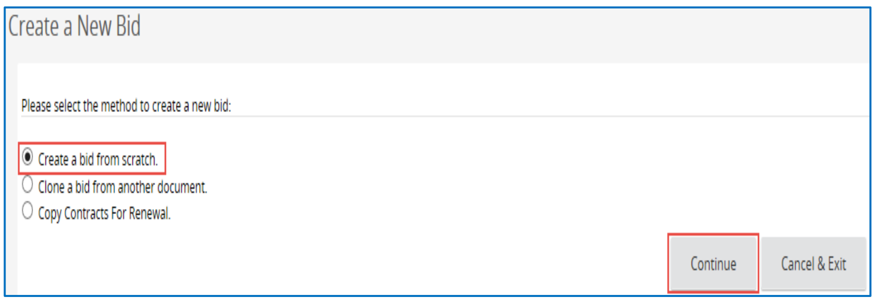

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Step 2: Creating a New Bid from Scratch

1. Ensure that the **Create a bid from scratch** radio button is pre-selected.
2. Click on the **Continue** button**.**

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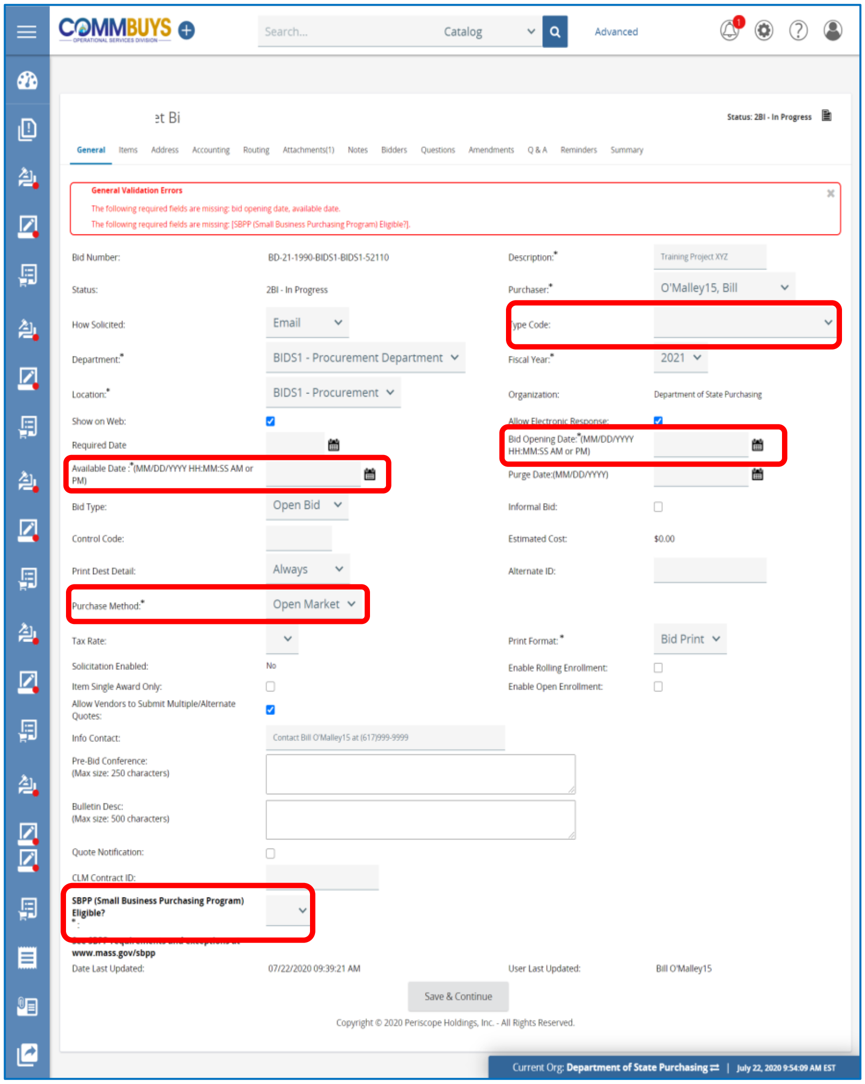


Step 3: Completing the Bid General Tab

The **General** tab displays. The fields that require completion include:

Description*: Enter a short description of the transaction. This is a searchable field.

Type Code: Using the dropdown arrow, select one of the following:

- **NS**: Bid for a non-statewide (departmental) solicitation
- **SS**: Bid for a statewide solicitation – **for OSD use only.**

Department*: Using the down arrow next to the field, select the ordering department from the dropdown menu.

Location*: Using the down arrow next to the field, select the ordering location from the dropdown menu.

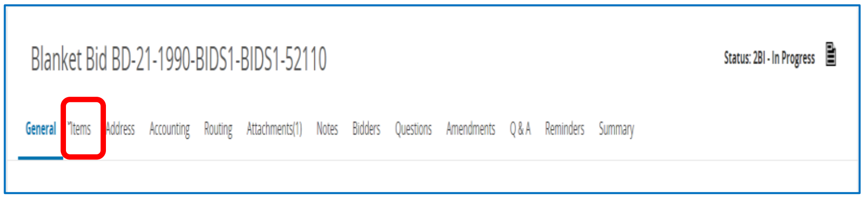
Available Date*: Enter the date the bid (solicitation) will be made available for vendors to view and submit quotes. Click on the calendar icon to set the desired month, day, and time.

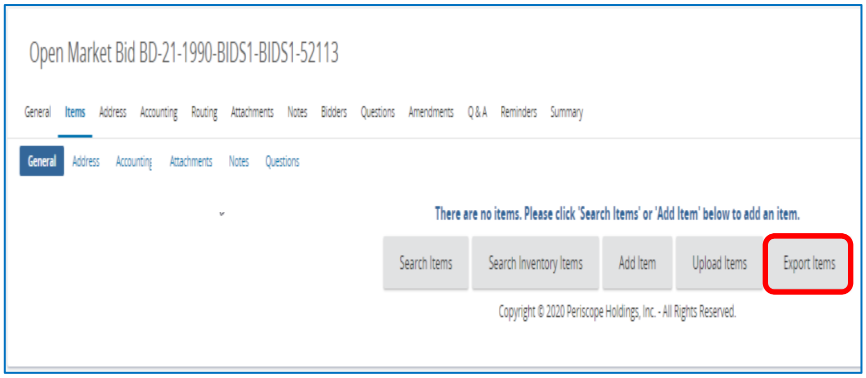
Bid Opening Date*: Enter the date that quotes will no longer be accepted and submitted quotes can be opened for viewing. Click on the calendar icon to set the desired month, day, and time (using the slide bars).

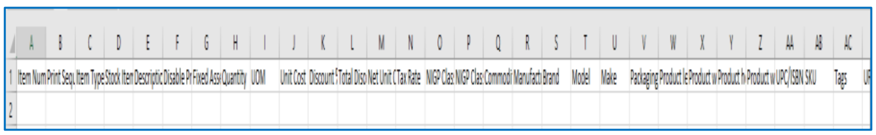
NOTE: If the year must be changed, select the desired year before selecting the month, day, and time.

Screenshot	Directions
	Purchase Method*: The following options display in the dropdown menu: • **Open Market:** Select for a one-time purchase/award • **Contract:** The Contract option should <u>NEVER</u> be selected • **Blanket:** Select if the Bid is going to result in a contract award. If selected, a pop-up message appears. Click on the **OK** button and two new fields will display and must be completed: • **Blanket Begin Date**: (the estimated contract beginning date) • **Blanket End Date**: the (estimated contract ending date) **SBPP (Small Business Purchasing Program) Eligible**?* – If displayed, select **Yes** from the dropdown menu if the transaction will likely total $150K or less. Select **No** if over $150K or if not applicable. Click on the **Save and Continue** button at the bottom of the page. An Overall Validation Errors message displays in red reminding you that items have not yet been added to the Bid Solicitation.

Screenshot	Directions







Step 4: Completing the Items Tab

1. Click on the **Items** tab.

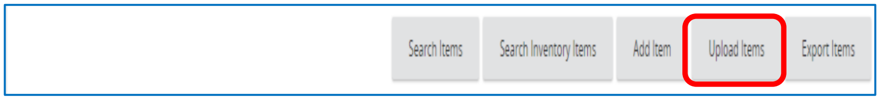
2. If you would like to include the items in an attachment or add a few items manually on a one-by-one basis, go to Step 7.

3. If you intend to add items to the COMMBUYS .csv (comma separated values) template, click on the **Export Items** button. A .csv file box displays on the bottom of your screen. Click on the .csv file to open the Items template.

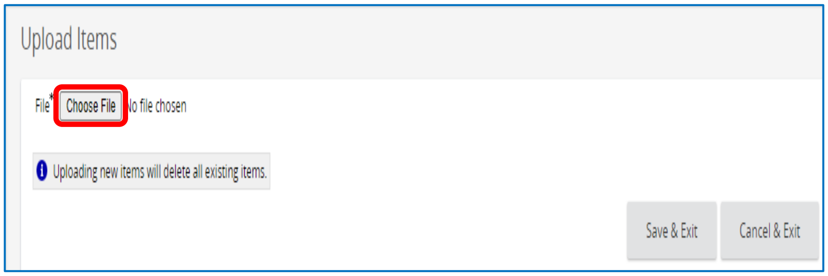
4. Complete the columns in the template, either by copying over from a saved template, a saved file (for example, another Excel .xls or .csv file), or by manually entering the items. The required fields include: Item Number, Print Sequence, Item Type, Description, Quantity, UOM (Unit of Measure), NIGP Class ID (UNSPSC Segment-Family), and NIGP Class Item (UNSPSC Class).

5. Save this file as a .csv file to your desktop, downloads, documents file or other location.

Step 5: Adding Items from the Template

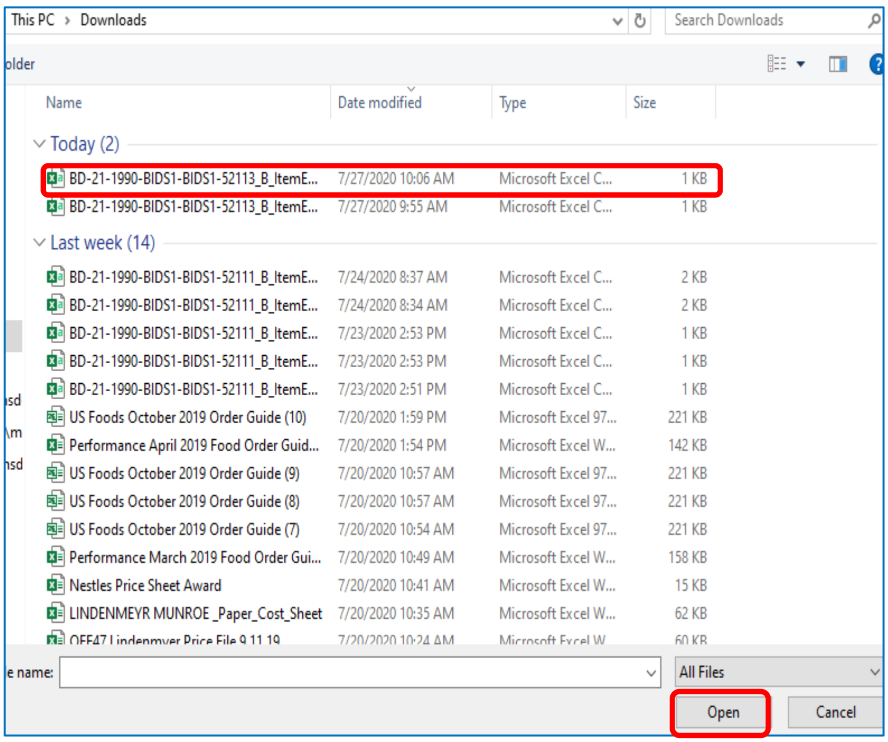


1. Return to the Items tab and click on the **Upload Items** button.

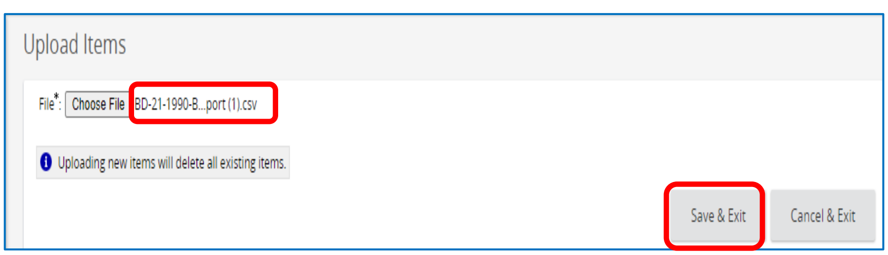


2. Click on the **Choose File** button.

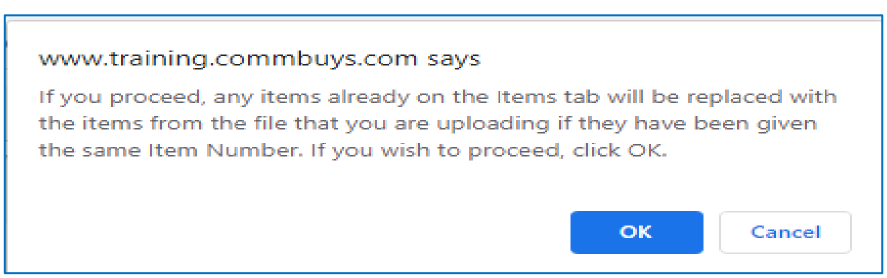
NOTE: This button may be labeled as the **Browse** button on some browsers.



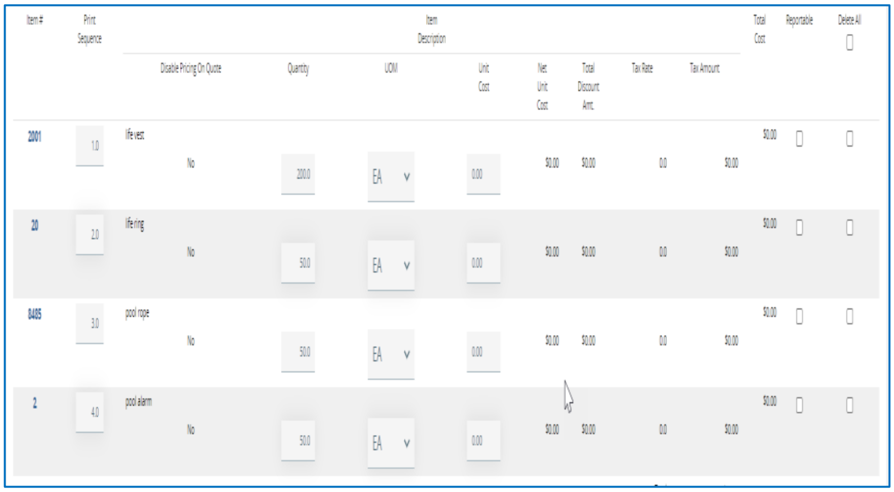
3. When the files display, select the file to upload and click on the **Open** button.

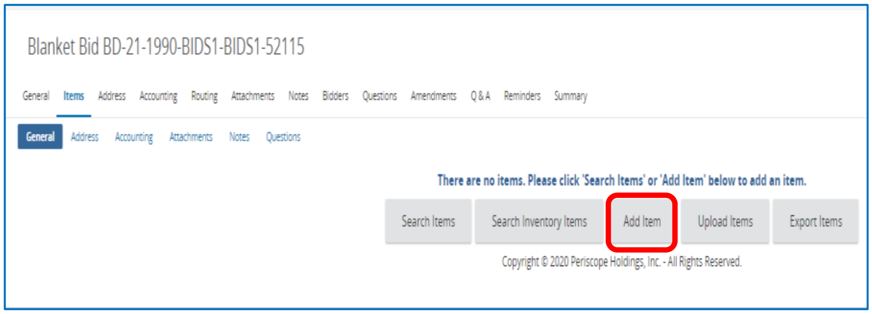


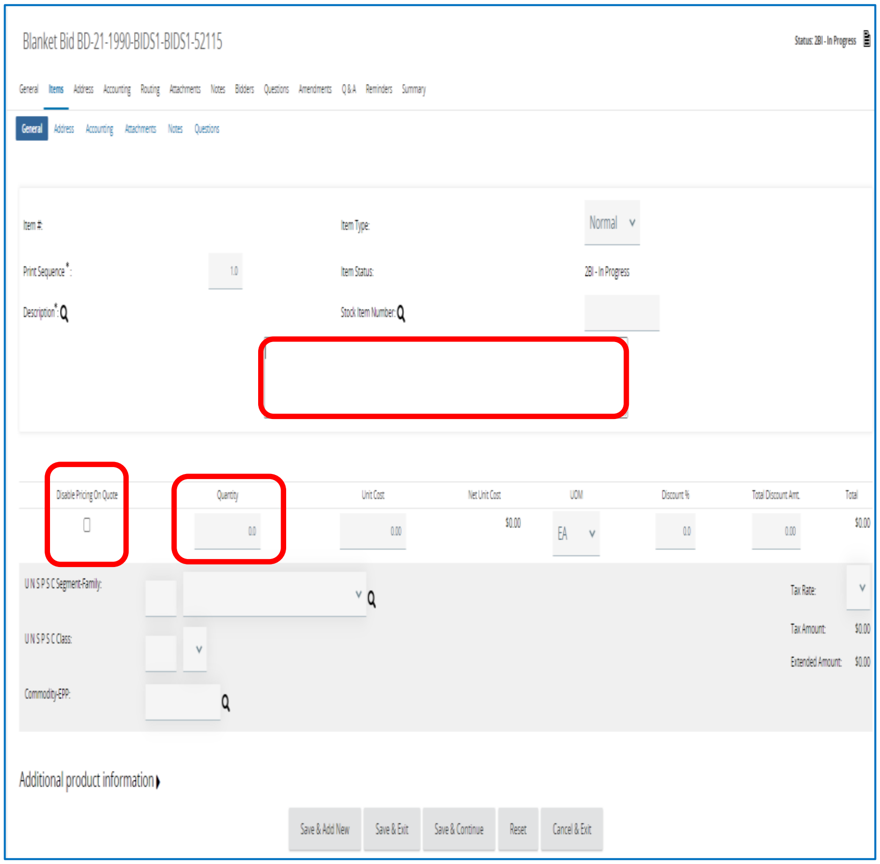
4. The uploaded filename displays on the Upload Items screen. Click on the **Save & Exit** button.



5. A popup message reminds you that this upload will replace any existing items on the bid. Click on the **OK** button.

Screenshot	Directions
	**Step 6: Verifying the Upload** 1. Review the upload for accuracy. If errors are found, the uploaded file can be corrected and then uploaded. 2. Go to Step 8.





Step 7: Adding Items as an Attachment or by Manual Entry

1. Click on the **Add Item** button.

2. Enter a description of the item in the **Description*** field (4000 character capacity). If attaching items, use a general description of the items.

3. For items to be included in an attached Bid Solicitation, select the **Disable Pricing on Quote** checkbox. This will force bidders to provide item pricing within their attached quote.

NOTE: For manual (one-by-one) entry, do not check this box.

4. Enter a desired quantity in the quantity field if known or enter **1.0** if the desired item is a service, or if the items will be described in an attachment.

5. Change the **UOM** (Unit of Measure) field if needed using the dropdown menu.

6. Enter the first four characters of the UNSPSC in the **UNSPSC Segment-Family:** field

7. Enter the next two characters of the UNSPSC in the **UNSPSC Class:** field.

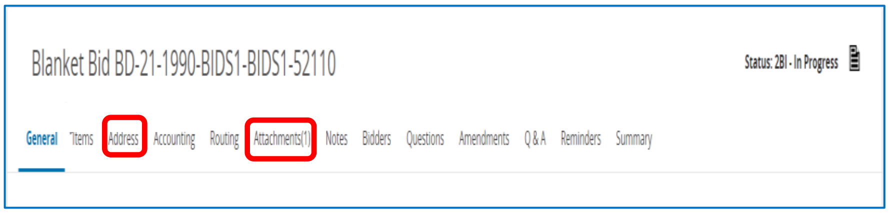
8. Enter the Commodity-EPP Code in the **Commodity-EPP field:** by clicking on the magnifying glass next to the Commodity-EPP field, selecting the code from the menu, clicking on the **Find It** button, selecting the radio button in the Select column of the desired code, and clicking on the **Select** button.

NOTE: If the UNSPSC Segment-Family and/or Class fields are known, they can be entered directly into the fields. If unknown, click on the magnifying glass icon, enter a keyword in the **UNSPSC Keyword** field and click on the **Search** button.

Screenshot	Directions

NOTE: UNSPSCs can also be found using the dropdown menus next to each field, by using the UNSPSC Lookup Tool on the COMMBUYS Landing Page, or by going to unspsc.org.

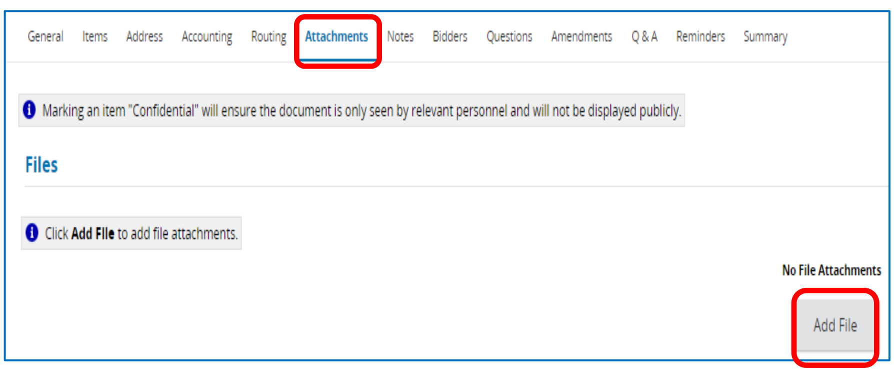
9. Repeat this Step if manually adding more items, by clicking on the **Save & Add New** button. If complete, click on the **Save & Exit** button.



Step 8: Verifying the Address Tab

1. Click on the **Address** tab. Verify that the Ship-to and Bill-to addresses are correct. If not, click on the magnifying glass icon to select an alternative.

   NOTE: The **Accounting** tab is not used in COMMBUYS. The following tab is the **Routing** tab which displays the path this document will follow towards approval. It is not activated until after you submit the document for approval.

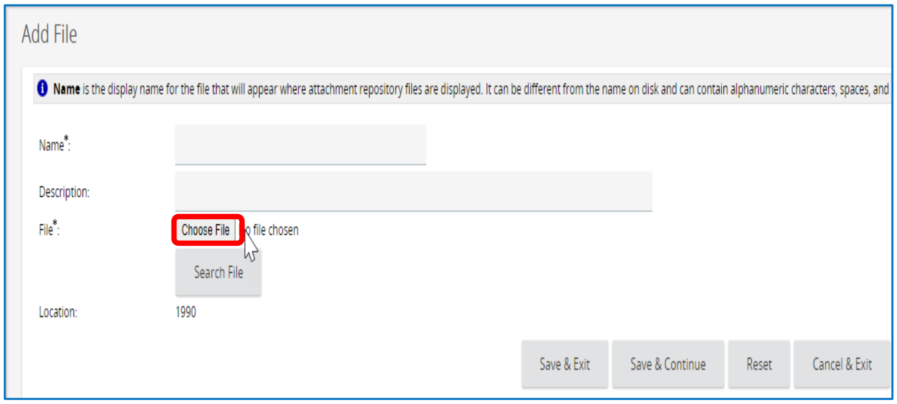


Step 9: Adding Attachments

Attachments may include all the elements of a Bid Solicitation including the solicitation (RFR, etc.), terms and conditions, a list of the items, and so on.

1. Click on the **Attachments** tab.
2. Click on the **Add File** button.

Screenshot | **Directions**



Step 10: Choosing a File to Attach

1. Click on the **Choose File** button.

NOTE: This button may be labeled **Browse** in some browsers.

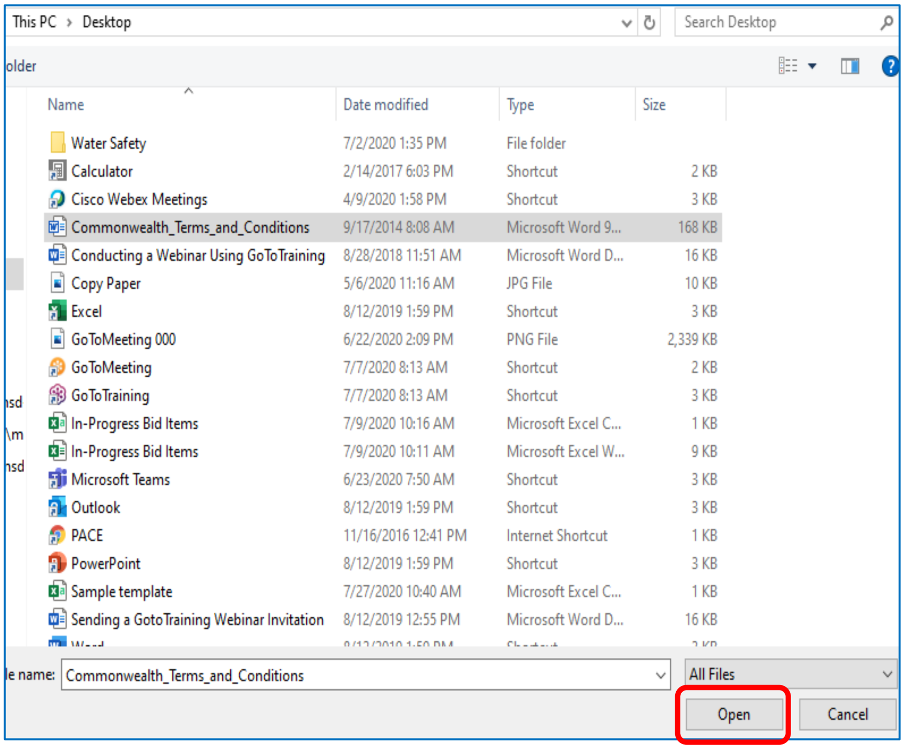
2. Select the desired file from its location (C: drive, shared drive, flash drive, documents folder, desktop, etc.).

3. Complete the following fields • Name – required; but will be populated with the selected file name if left blank • Description – optional.

4. Click on the **Save & Exit** button to add another file or when all files have been added.

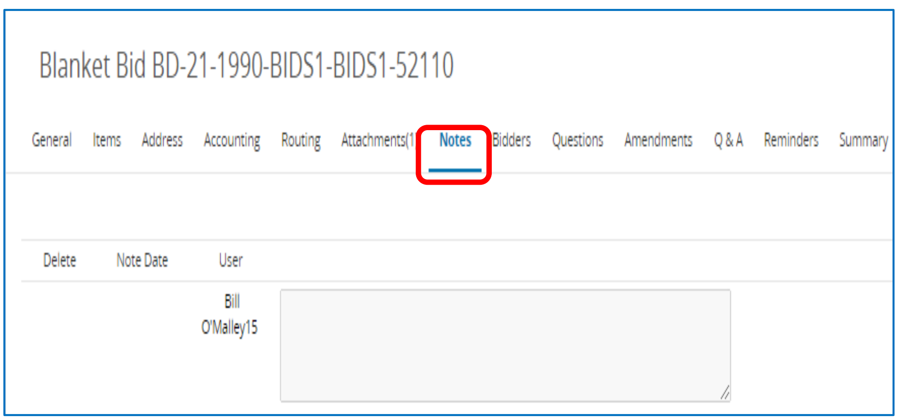
NOTE: Files previously uploaded or added to the Document Library in COMMBUYS are available in the Attachment Repository. To locate and attach from the repository, click on the **Search File** button and complete the advanced search criteria.

Screenshot	Directions



Step 11: Selecting the File to Attach

1. Click on the file to attach.
2. Click on the **Open** button.

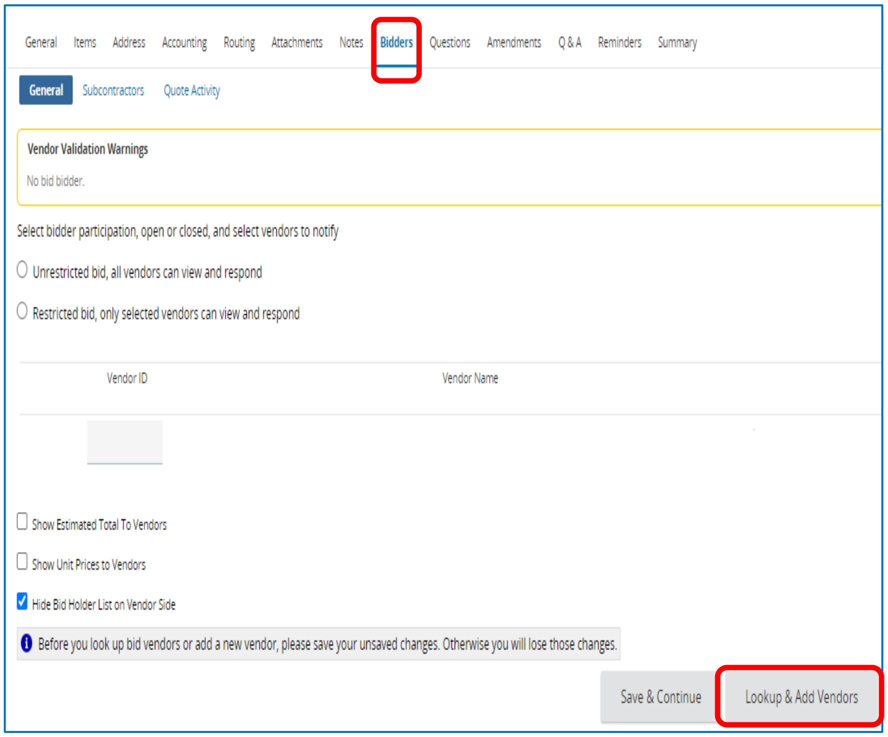


Step 12: Adding Notes

1. Click on the **Notes** tab if you would like to add an internal note. If not, go to Step 13.
2. When complete, click on the **Save & Continue** button. Additional notes may be added if needed.

   NOTE: Notes are viewable by you and others in your work group. These are not viewable by the vendor, however, keep in mind that this information may be made available externally due to Freedom of Information requests.

Screenshot	Directions

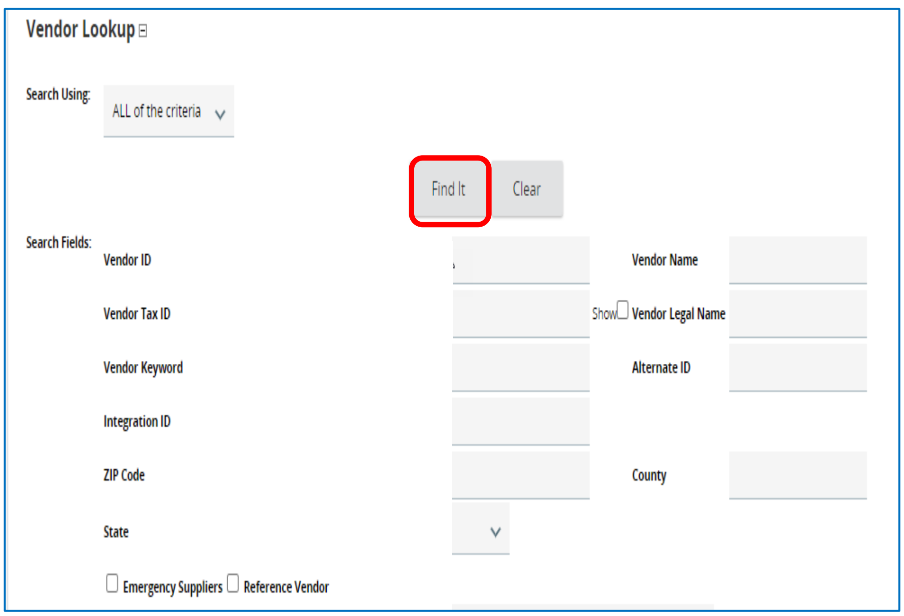


Step 13: Identifying Bidders

1. Click on the **Bidders** tab.

2. To add bidders, click on the **Lookup & Add Vendors** button at the bottom of the page.

NOTE: You have the option to not select any Bidders.



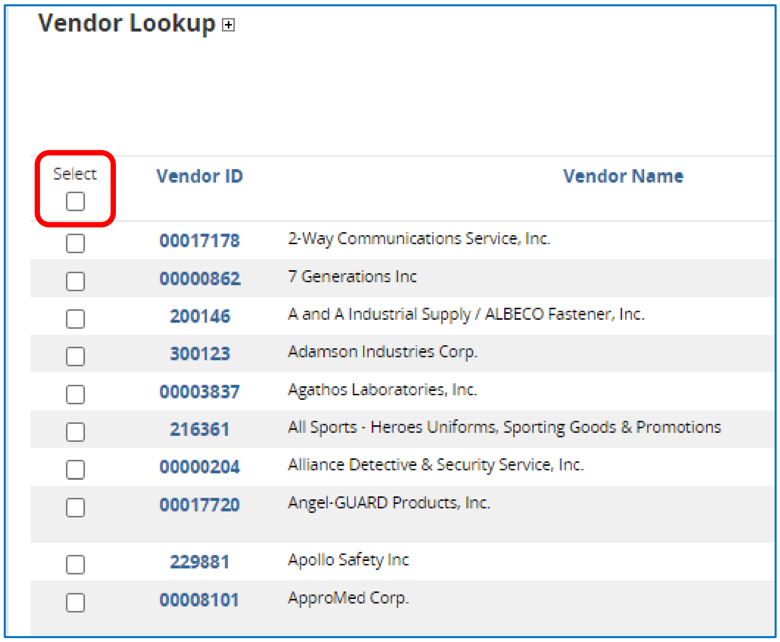
Step 14: Searching for Vendors

A Lookup & Add Reference Vendors popup window appears with a Vendor advanced search page. You can either:

- enter vendor search criteria and click on the **Find It** button (commonly used for one-time only Open Market Bids), or

- scroll to the bottom of the page and click on the **Find Vendors for All Commodity-EPP on the Req** button (commonly used for Blanket Bid Solicitations)

Screenshot	Directions



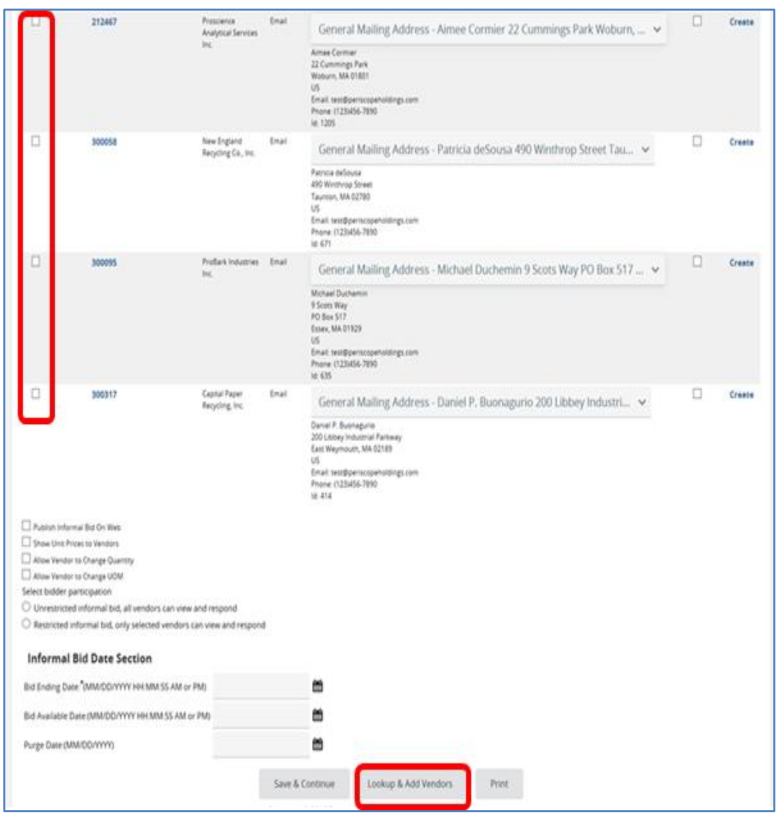
Step 15: Selecting Bidders

The results display with all bidders who registered in COMMBUYS using the same commodity code as you entered on the Items tab, or with all bidders meeting the criteria you entered using the Find It button.

1. Select the checkbox in the **Select** column next to the desired bidders (restricted bid) or select the top checkbox in the **Select** column to include all the listed bidders (best practice – unrestricted bid).

2. If selecting the top checkbox, a popup window displays reminding you that all bidders on the list will be notified. Click on the **OK** button.

3. Click on the **Save & Exit** button at the bottom of the page to return to the Bidders tab.

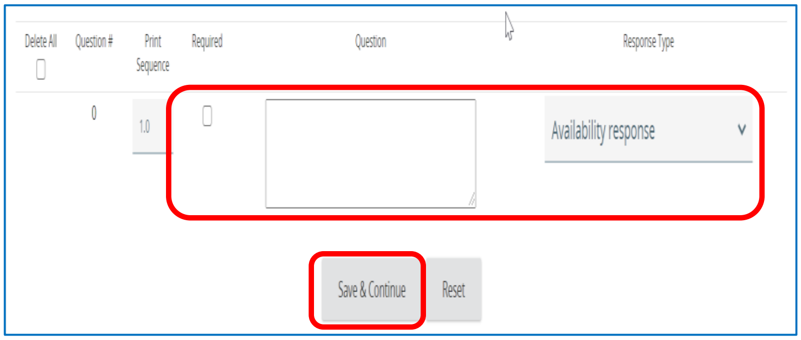


Step 16: Verifying the Bidders

The Bidders tab now displays all the bidders you selected.

You can delete bidders using the checkboxes in the **Delete** column, and/or you can continue to add bidders by clicking on the **Lookup & Add Vendors** button.

NOTE: Generally, as a best practice, bidders should not be deleted from Bid Solicitations without good cause.

Screenshot	Directions
	**Step 17: Completing the Questions Tab** If you have questions to ask of bidders: 1. Click on the **Questions** tab. 2. Select the **Required** checkbox. Doing so will require bidders to answer the question before their quote can be submitted. 3. Enter the question text in the **Question** field. 4. Select a value from the **Response Type** dropdown list to establish a format for the vendor response. 5. Click on the **Save & Continue** button to save your entries. **NOTE:** The next tab is the **Amendments** tab which has no functionality until after the bid is sent.

Screenshot	Directions

Step 18: Completing the Q&A Tab

1. Click on the **Q&A** tab.

2. To dialogue with bidders, select the **Allow vendor to submit questions** checkbox.

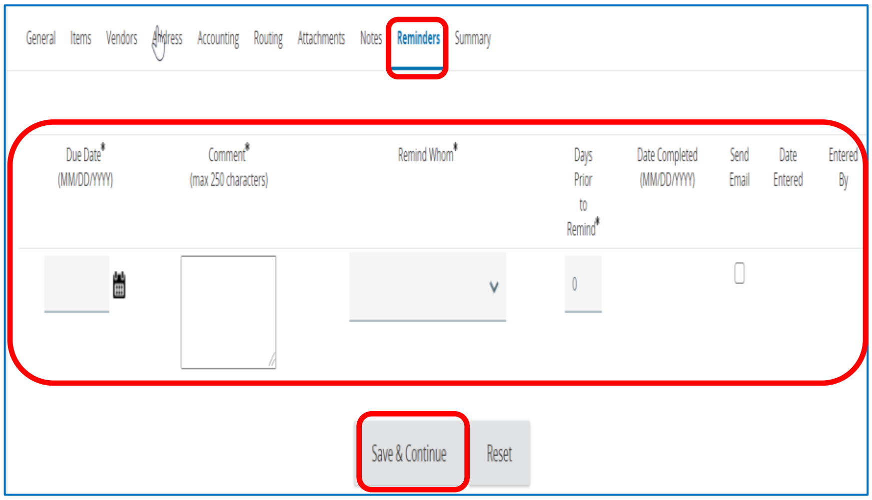
3. If you would like COMMBUYS to notify you by email when a bidder submits a question, select the **Send notification when vendor submitting question** checkbox.

NOTE: Numbers 2 & 3 above are considered a best practice.

4. Click on the **Save & Continue** button.

NOTE: When a question is received, provide an answer and ensure that the **Show All on Web** checkboxes are checked, and that the **Show Original Vendor Only** checkboxes are unchecked. This is the best practice as all questions and answers will be viewable by all bidders. All questions and answers may be subject to disclosure through Freedom of Information Act requests.

Screenshot	Directions



Step 19: Entering Reminders

1. Click on the **Reminders** tab if you want to send a reminder to yourself or another person within your organization. If not, go to Step 20.

2. Use the calendar icon in the **Due Date*** field to select the date of the reminder.

3. Enter your reminder text in the **Comment*** field.

4. Select yourself or another internal recipient from the dropdown menu next to the **Remind Whom*** field.

5. If an advanced reminder (tickler message) is desired, enter a number in the **Days Prior to Remind*** field.

6. Click on the **Send Email** checkbox to ensure that the reminder notification is emailed to the intended recipient.

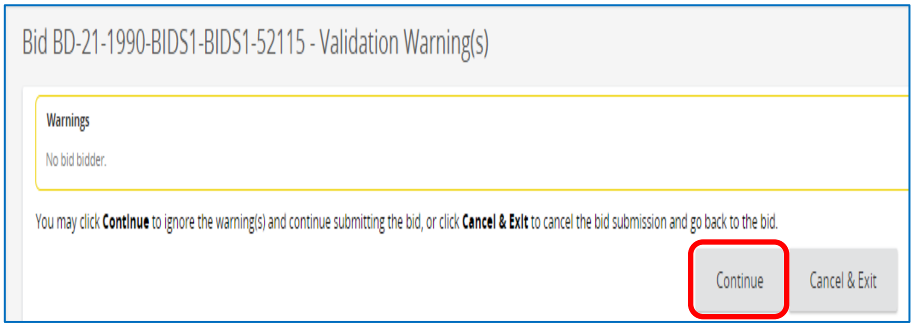
When complete, click on the **Save & Continue** button.

Screenshot	Directions

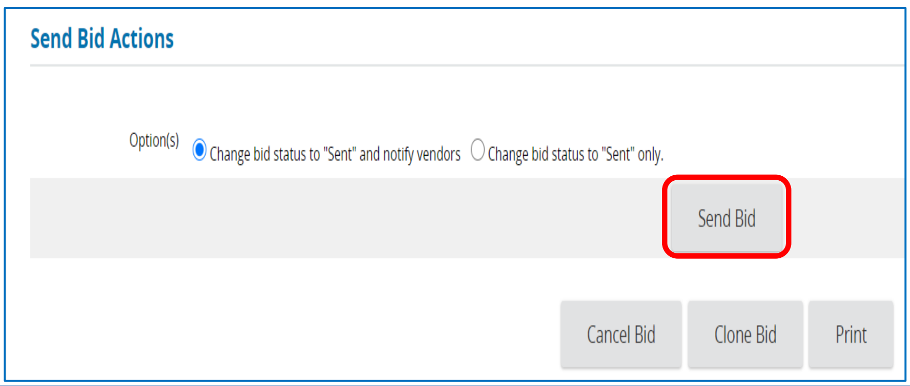
Step 20: Submitting for Approval

1. Click on the **Summary** tab to review the bid information.

2. Scroll to the bottom of the page and click on **the Submit for Approval** button.



NOTE: If you decided not to select any Bidders, a Validation Warning displays with a reminder that a bidder has not yet been selected. Click on the **Continue** button.



3. Following approval, return to the bid and click on the **Send Bid** button near the bottom of the Summary page.