

# Job Aid:

# How to Create a Rolling Enrollment Bid from Scratch

#### This Job Aid Shows How To:

• Create a Rolling Enrollment bid using the Create Bid from Scratch option.

### Of Special Note:

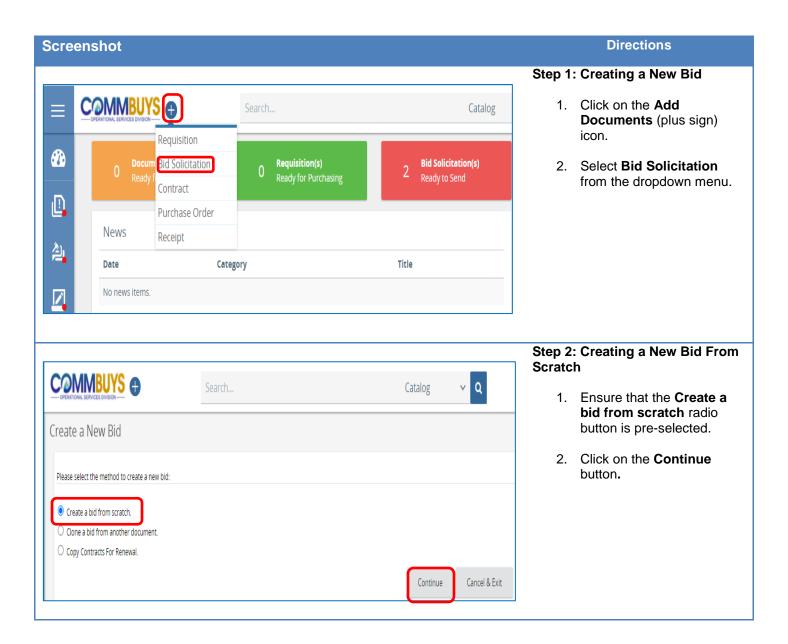
Guidance for rolling enrollment bids can be found in Section III, E, xi, c of the Best Value Procurement Handbook.

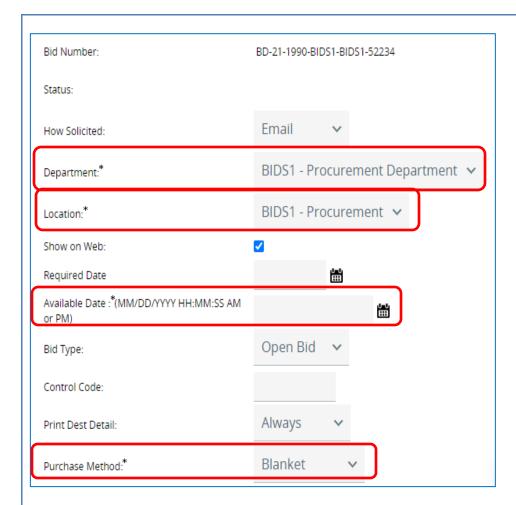
In addition to selecting a qualified pool of vendors for the duration of the procurement, RFRs for multiple contractors also may be Rolling procurements. The Rolling method allows Bidders to submit responses at any time during the procurement.

#### **Rolling Enrollment:**

- Allows you to accept bids and review them as they come.
- Has one enrollment period to award vendors to an established contract
- Allows purchaser to award vendors anytime
- Must act as informal

Under a Rolling Enrollment process the RFR never closes, allowing Bidders to respond at any point during the life of the solicitation. Managing rolling enrollments requires advanced planning by the Buyer to ensure that submissions are handled appropriately and in a timely fashion. Bids may be designated as Rolling Enrollment upon creation of the bid in COMMBUYS. In COMMBUYS, a Rolling Enrollment bid is posted as an Informal Bid with a Bid Opening Date set to be the same as (or before) the end date for the associated contract.





# Step 3: Completing the Left Side of the New Bid Screen

The New Bid screen opens to the General tab. On the left side of the screen, all fields with an asterisk are required. The required fields are:

- Department: Click on the dropdown arrow to select the desired department.
- Location: Click on the dropdown arrow to select the desired location.
- Available Date: This identifies when the bid becomes available for vendor viewing. Clicking the calendar icon next to this field displays the current date and time. Clicking the **Now** button inserts the current date and time into this field. Click the **Done** button when you have entered the desired date. You can enter a different date and/or time using the calendar and scroll bar. NOTE: If you need to change the calendar year, do so before changing the month and day.

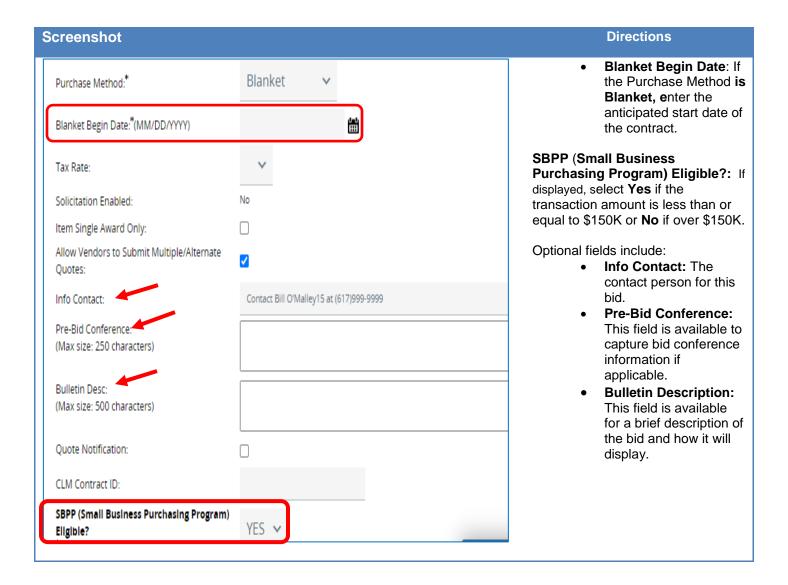
**Purchase Method**: Change the Open Market default **to Blanket** if establishing a contract.

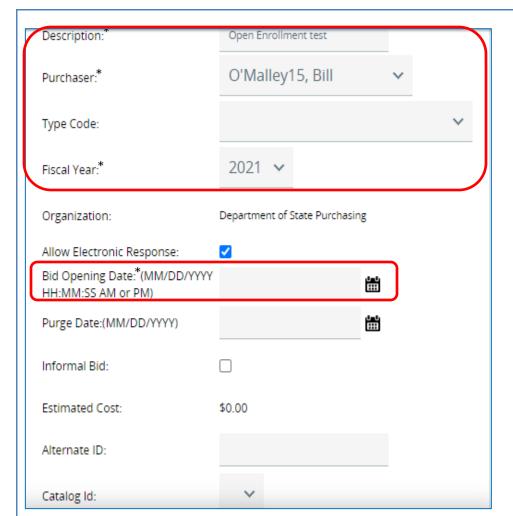
NOTE: If you change the Purchase Method field to Blanket, a pop-up screen displays. Clicking the OK button will change the display in this field to Blanket and will add two required fields – Blanket Begin Date in the left column and Blanket End Date in the right column.

# www.training.commbuys.com says

Changing the po type from Open Market to Blanket will result in the removal of all accounting and rollback of any encumbered amounts. Proceed?







# Step 4: Completing the Right Side of the New Bid Screen

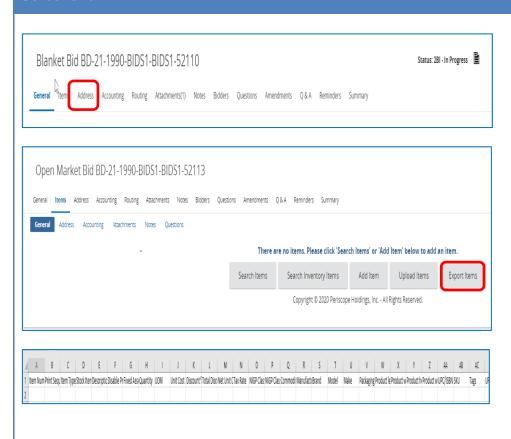
All fields with an asterisk are required. The required fields are:

- Description: Title of your bid. This field is used as search criteria to locate a bid, so be specific.
- Purchaser: This defaults to your name. Use the dropdown to select a different purchaser.
- Type Code does not have an asterisk but is required. Enter NS (non-statewide solicitation) if posted for goods or services to be included on a departmental contract. Enter SS (statewide solicitation) if posted as a requirement for goods or services to be included a statewide contract (OSD only).
- Fiscal Year: This field defaults to the current Fiscal Year. Use the dropdown to select a different year if appropriate.
- Bid Opening Date:
   This date is the date that will close the bid to the public. On this date, COMMBUYS will no longer accept quotes for that bid and the Buyer will be able to open and view the quotes. This date can be changed in the same manner as the Available Date.

**NOTE:** For Rolling Enrollments, this date should be set to be the same as (or before) the Blanket End Date for the associated contract.

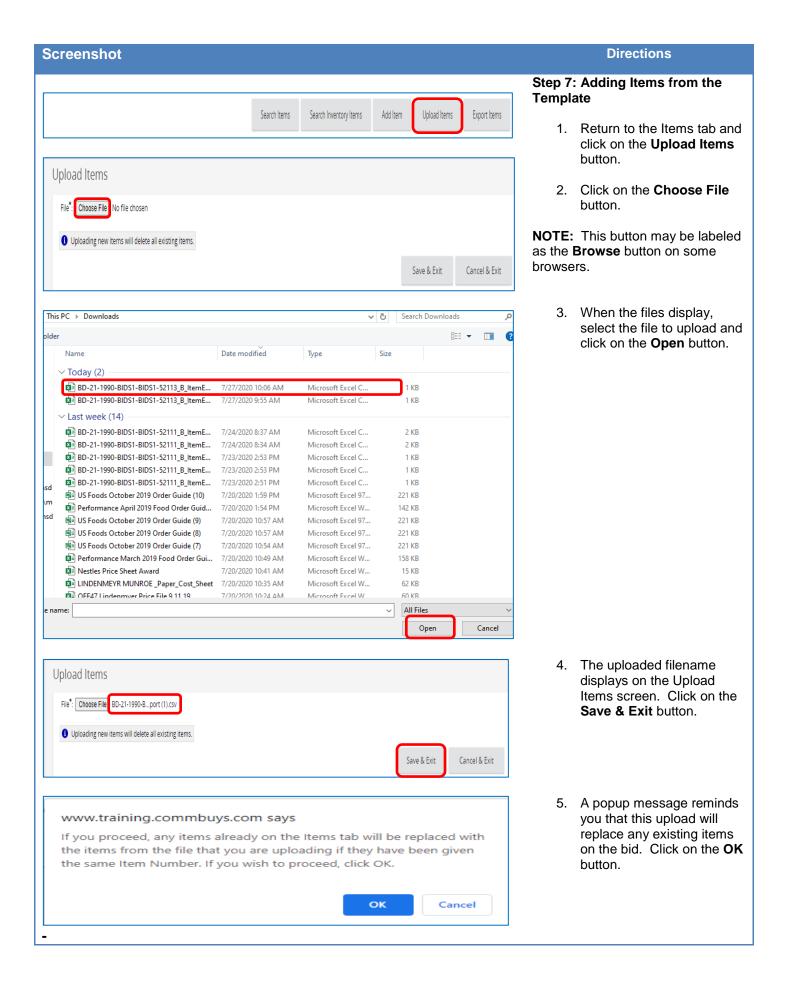
# **Screenshot Directions** Blanket End Date: Displays if the Type Blanket End Date: \*(MM/DD/YYYY) \*\*\* Code has been changed to Blanket. Enter the anticipated Print Format: \* Bid Print 🗸 end date of the contract. Enable Rolling Enrollment: Print Format: Leave Enable Open Enrollment: Bid Print as the default. NOTE: The optional fields at the bottom of the screen are available to choose either rolling or open enrollment. For some organizations, these fields may need to be configured by your **COMMBUYS Organization** Administrator. Step 5: Selecting Rolling **Enrollment** Informal Bid: 1. Select the Enable Rolling Enrollment checkbox. Estimated Cost: \$0.00 When you do so, note that the Informal Bid checkbox automatically fills in with a Alternate ID: checkmark. 2. Ensure that the Bid Opening Date has been set to be the same as (or before) the end date for the Print Format: \* Bid Print > associated contract. Enable Rolling Enrollment: 3. Click on the Save & **Continue** button at the Enable Open Enrollment: bottom of the page.

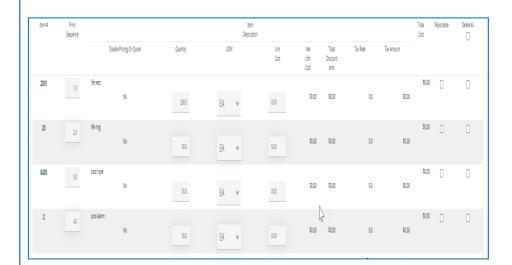
<u>Screenshot</u> <u>Directions</u>



#### Step 6: Completing the Items Tab

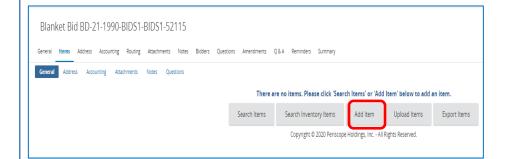
- 1. Click on the Items tab.
- 2. If you would like to include the items in an attachment or add a few items manually on a one-by-one basis, go to Step 9.
- 3. If you intend to add items to the COMMBUYS .csv (comma separated values) template, click on the **Export Items** button. A .csv file box displays 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.

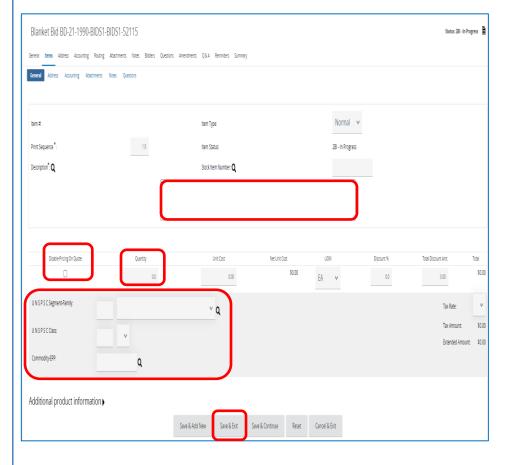




#### Step 8: Verifying the Upload

- Review the upload for accuracy. If errors are found, the uploaded file can be corrected and then uploaded.
- 2. Go to Step 10.





# Step 9: Adding Items as an Attachment or by Manual Entry

- 1. Click on the **Add Item** button.
- Enter a description of the item in the **Description\*** field (4000 character capacity). If attaching items, use a general description of the items.
- 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.

- 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.
- Change the **UOM** (Unit of Measure) field if needed using the dropdown menu.
- Enter the first four characters of the UNSPSC in the UNSPSC Segment-Family: field

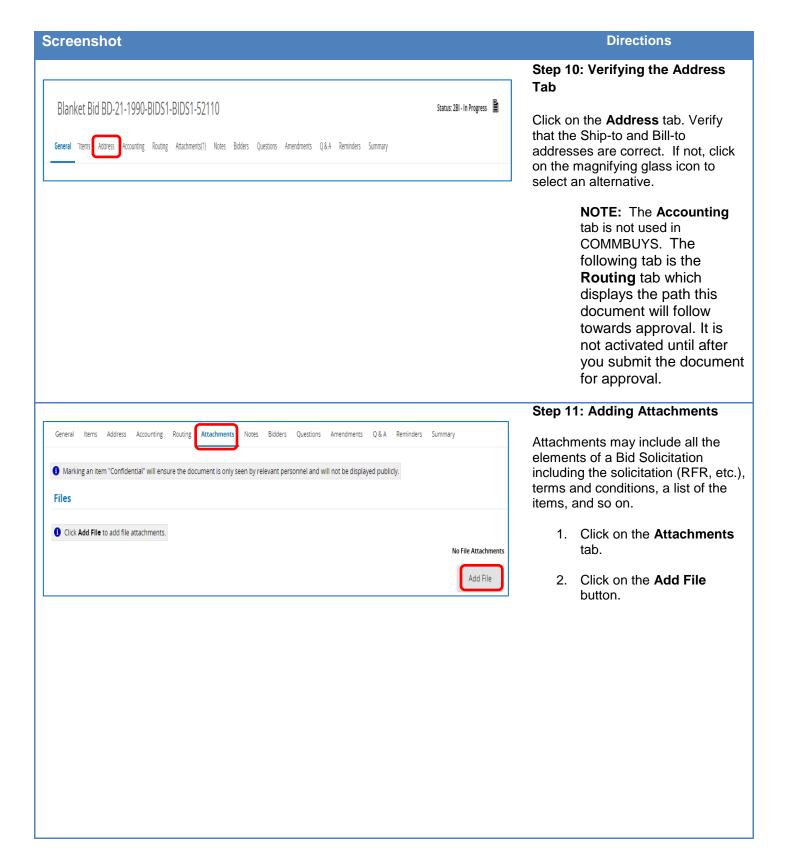
7. Enter the next two characters of the UNSPSC in the UNSPSC Class: field.

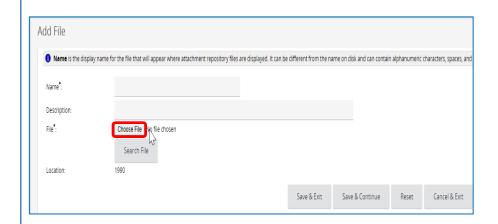
8. Enter the Commodity-EPP
Code in the CommodityEPP field: by clicking on
the magnifying glass next to
the Commodity-EPP field,
selecting the code from the
menu, clicking on the Find
It button, selecting the radio
button in the Select column
of the desired code, and
clicking on the Select
button.

**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.

**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.

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





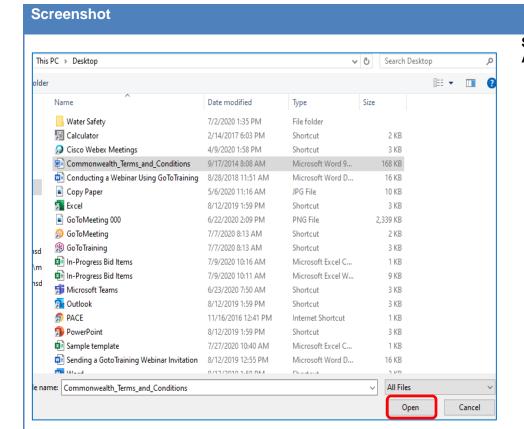
# Step 12: Choosing a File to Attach

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

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

- Select the desired file from its location (C: drive, shared drive, flash drive, documents folder, desktop, etc.).
- Complete the following fields • Name – required; but will be populated with the selected file name if left blank • Description – optional.
- 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.



# Directions

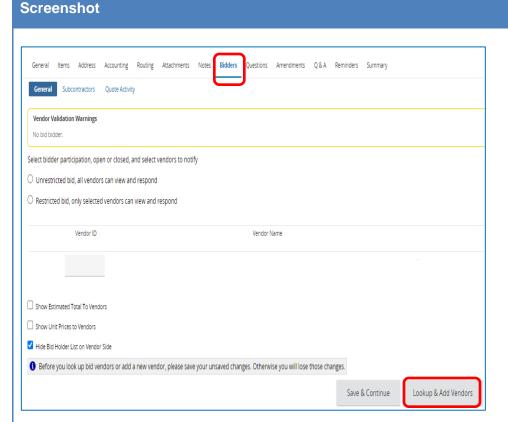
# Step 13: Selecting the File to Attach

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



- Click on the **Notes** tab if you would like to add an internal note.
- 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.



# Directions

# Step 15: Identifying Bidders

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

# Vendor Lookup **∃** Search Using: ALL of the criteria 🔍 Find It Clear Search Fields: Vendor ID 1 Vendor Name Show Vendor Legal Name Vendor Tax ID Vendor Keyword Alternate ID Integration ID ZIP Code County State ☐ Emergency Suppliers ☐ Reference Vendor

#### **Step 16: 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

Close Window Reserved.

 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)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Find It

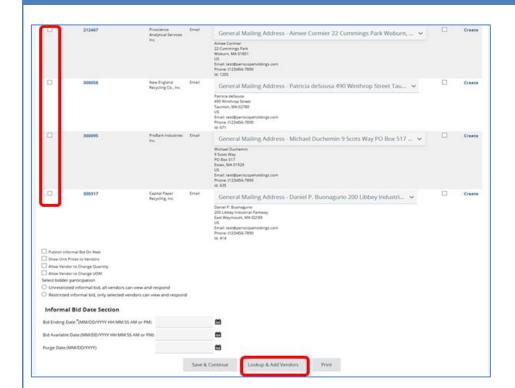
Clear

Find Vendors for All Commodity-EPPs on the Bid

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0 1 2 3 4 5 6 7 8 9 10

**Screenshot Directions** Step 17: 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 Select Vendor ID **Vendor Name** with all bidders meeting the criteria you entered using the Find It button. 00017178 2-Way Communications Service, Inc. 00000862 7 Generations Inc Select the checkbox in the A and A Industrial Supply / ALBECO Fastener, Inc. 200146 Select column next to the 300123 Adamson Industries Corp. desired bidders (restricted 00003837 Agathos Laboratories, Inc. bid) or select the top checkbox in the Select All Sports - Heroes Uniforms, Sporting Goods & Promotions 216361 column to include all the Alliance Detective & Security Service, Inc. 00000204 listed bidders (best practice Angel-GUARD Products, Inc. 00017720 - unrestricted bid). 229881 Apollo Safety Inc 00008101 ApproMed Corp. 2. If selecting the top www.training.commbuys.com says checkbox, a popup window displays reminding you that Warning: All vendors have been selected for email notification. A large all bidders on the list will be quantity of vendors may take several minutes to process. notified. Click on the OK button. OK 3. Click on the Save & Exit button at the bottom of the Save & Exit Save & Continue Find Vendors for All Commodity-EPPs on the Bid Save & Next Page page to return to the Bidders tab. Close Window

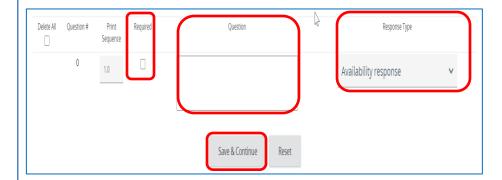


#### Step 18: Verifying the Bidders

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.



## Step 19: Completing the Questions Tab

If you have questions to ask of bidders:

- 1. Click on the **Questions** tab.
- 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.
- Select a value from the Response Type dropdown list to establish a format for the vendor response.
- 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.



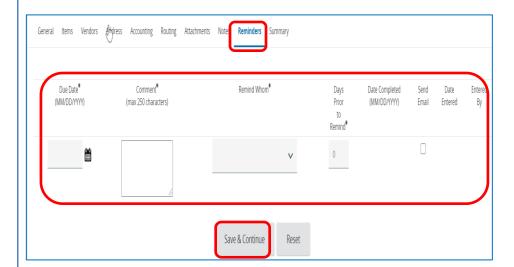
# Step 20: Completing the Q&A Tab

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



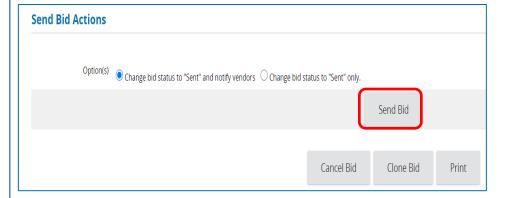
# Step 21: Entering Reminders

- Click on the Reminders tab if you want to send a reminder to yourself or another person within your organization.
- 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.
- Select yourself or another internal recipient from the dropdown menu next to the Remind Whom\* field.
- If an advanced reminder (tickler message) is desired, enter a number in the Days Prior to Remind\* field.
- 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.





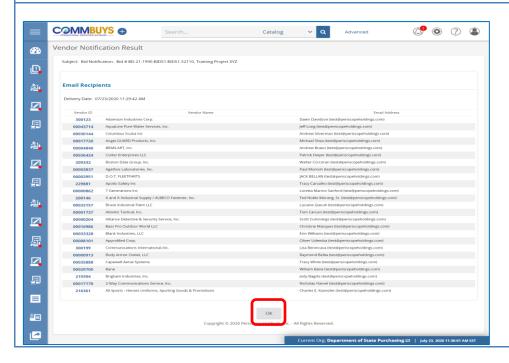


### **Step 22: Submitting for Approval**

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



#### Step 23: Verifying the Bidders

The list of bidders (vendors) to notify by email displays. Click on the **OK** button to verify.

**NOTE:** After receiving quotes from vendors, the next step is to evaluate and award the bid to a vendor or vendors. Refer to the job aid entitled: **How to Score and Award a Bid.**