

Job Aid: How to Create an Open Enrollment Bid Using a Requisition

This Job Aid Shows How To:

Create an Open Enrollment Bid from an approved Requisition.

Of Special Note:

Guidance for open enrollments can be found in Section III, E, xi, c of the Best Value Procurement Handbook.

Open Enrollment:

- Allows you to re-open the contract at any time (or at set intervals) to add new vendors.
- Allows adding vendors to an established contract
- Allows awarding to vendors during the open enrollment period
- Has multiple quote submission periods
- Must act as informal

NOTE: Information regarding the creation of a requisition can be found in the Buyer Job Aid entitled *How to Create an Open Market Requisition.*



Directions

In Progress	Ready for Approval Returned	Ready for Purchasing	Gone to PO	Gone to Bid				
			1-1 of 1 《	< <u>1</u> → »				
Requisition #	Oescription	🗘 Req Type 🛛 🗘	Requestor 🗘	Purchaser 🗘	Dep/Loc 🗘	Created Date	Total 🗘	Submitted Date

Step 2: Clicking on the Hyperlink

After clicking on the green **Requisition(s) Ready for Purchasing** box, click on the blue hyperlink in the **Requisition #** column to open the desired requisition.

Step 3: Converting the Requisition to a Bid Item Information 8 1. The requisition opens to the Summary tab. Scroll to the bottom of the page and click **Approval Paths** on the Convert to Bid button. There are no approval paths found for this requisition. **Approval Actions** Options O Disapprove Comment Save & Exit Cancel Regulation Convert to Bid Convert to PO Clone Regulation Print All Party Res 6 304 initian he www.training.commbuys.com says 2. A popup message displays asking if you are sure. Click Are you sure you want to convert this requisition to a bid? on the **OK** button to confirm. Cancel

Screenshot	Directions
	Step 4: Opening the Bid
Open Market Requisition RQ-21-1990-BIDS1-BIDS1-301187 General Items Vendors Address Accounting Routing Attachments(1) Notes Reminders Summary	The Requisition screen redisplays with a Gone to Bid status. Click on the blue hyperlink in the yellow System Warning(s) box to open the bid.
System Warning(s) X New bid is BD-21-1990-BIDS1-S2110	
Open Market Bid BD-21-1990-BIDS1-BIDS1-52110	Step 5: Viewing the Bid Summary Screen The Summary screen opens with a warning displaying Validation Errors.
General Lems Address Acc ² hting Routing Attachments(1) Notes Bidders Questions Amendments Q.&.A. Reminders Summary Overall Validation Errors The following required fields are missing bid opening date, available date.	Click on the General tab.
The following required fields are missing: [SBPP (Small Business Purchasing Program) Eligible?]. Header Information	



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?

ок	Cancel
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Step 6: Completing the Bid General Tab

The **General** tab displays. All information from the requisition (except Reminders) is automatically populated into the bid. The fields that require completion include:

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 **OSD use only.**

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.

Purchase Method*: Select Blanket

and click on the pop-up **OK** button. Two new fields 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** if the transaction amount is less than or equal to \$150K or **No** if over \$150K.

		Step 7: Selecting Open Enrollment
Informal Bid: Estimated Cost: Alternate ID:	\$0.00	 The last two fields on the lower right side of the page are for Rolling and Open Enrollment. Select the Enable Open Enrollment checkbox. When you do so, note that the Informal Bid
		checkbox does not fill in with a checkmark.
Print Format: *	Bid Print 🗸	Also note that an Enrollment Periods popup box displays – a function that will allow the
Enable Rolling Enrollment: Enable Open Enrollment:		a function that will allow the user to enter the start date and end date of the open enrollment period. It also allows you to add additional periods.
Enrollment Periods: Delete Start Date	End Date	2. Once the period(s) has been entered, click on the Add Enrollment Period button.
	#	3. Scroll to the bottom of the General tab page and click on the Save & Continue button.
Add Enrollment Period		button.
		Step 8: Verifying the Items Tab
Blanket Bid BD-21-1990-BIDS1-BIDS1-52110	Status: 281-	Click on the Items tab and verify what was entered during the Requisition stage. Edits can be

General Titems Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q.&.A Reminders Summary	

DIdTIKE	et Bid BD-2	1-1990-BIDS1	-BIDS1-5	2110	Status: 2BI - In Progress
General It	tems Add ss	Accounting Routing	Attachments(I) Notes Bidders Questions Amendments Q&A Reminders Summary	
General	Subcontractors	Quote Activity			
elect bidder	participation, ope	en or closed, and select	vendors to no	tify	
) Unrestricte	ed bid, all vendor	s can view and respond	i		
Restricted	l bid, only selected	d vendors can view and	respond		
Delete All	Vendor ID	Vendor Name		Vendor Address	Preferred Delivery Method
	Vendor ID	Vendor Name		Vendor Address	Preferred Delivery Method
All				Vendor Address	Delivery Method
All	Vendor ID 00000204	Alliance Detective &	Bid Mailing Address:	Vendor Address Add New Address	
All		Alliance			Delivery Method

Directions

Step 9: Verifying the Address and Attachments Tabs

- Click on the Address tab. Verify that the Ship-to and Bill-to addresses are correct.
- 2. Click on the **Attachments** tab. Verify and/or add files if needed.

Step 10: Verifying the Bidders Tab

- Click on the **Bidders** tab. The Vendors identified in the Requisition will display.
- 2. If you have cause to delete vendors from the original list, select the radio button next to **Restricted** bid.
- Amend the list of Bidders by deselecting the checkbox in the Delete column for those vendors you wish to eliminate. (NOTE: This is not a best practice).
- To add more Bidders, click on the Lookup & Add Vendors button at the bottom of the page.
- If any changes have been made to the Bidders tab, click on the Save & Continue button; otherwise go to the next step.

Directions



Step 11: Completing the Questions Tab

If you have questions to ask of vendors:

- 1. Click on the **Questions** tab.
- 2. Select the **Required** checkbox. Doing so will require vendors 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 posted.

Question # Cr	eated Date	User Created	Question Subject	Question	Answer	Show All on Web	Show Original Vendor Dnly	Delete A
Add New:								
Allow vendor to			ion					
)	\square				

Directions

Step 12: Completing the Q&A Tab

- 1. Click on the **Q&A** tab.
- 2. To dialogue with vendors, select the Allow vendor to submit questions checkbox.
- If you would like COMMBUYS to notify you by email when a vendor submits a question, select the Send notification when vendor submitting question checkbox.

NOTE: Numbers 2 and 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 vendors. All questions and answers may be subject to disclosure through Freedom of Information Act requests.

Step 13: Submitting for Approval

- 1. 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.

OPERATIONAL SERVICES DIVISION	S ⊕	Search		Catalog	; v	Q Adva	inced		
Document () Ready for Approval	s) 1	Requisition(s) Ready for Purchasing	Bid () Solicitation(s) Ready to Send	1	Bid Solicitati Ready to		0 PO(s) Ready to Send	0	Change Order(s) Ready To Apply
News				F	Recent Do	cuments			
Date	Categor	у	Title	D	ocument #	Туре	Description	Status	Last Viewed
No news items.				В	Q-21-1990- IDS1-BIDS1- 01187	Requisition	Training Project XYZ	Ready for Purchasing	07/21/2020



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Advanced

Catalog

Step 14: Sending the Bid

Once the bid is approved, you will receive an email notification from COMMBUYS.

- Locate the bid by selecting the Bid Solicitation(s) Ready to Send tile box or look for it in the Recent Documents box.
- 2. Click on the blue hyperlink for the bid. The Summary tab page displays with a status of Ready to Send.
- Scroll to the bottom of the page and click on the Send Bid button.

Step 15: Verifying the Bidders

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

NOTE: Your bid is now in Sent status which indicates that all selected bidders will receive the bid electronically on the available date.

L.		ication - Bid # BD-21-1990-BIDS1-BIDS1-52110, Training Project XYZ	
곌	Email Recipi	ents	
	Delivery Date: 07	7/23/2020 11:29:42 AM	
	Vendor ID	Vendor Name	Email Address
	300123	Adamson Industries Corp.	Dawn Davidson (test@periscopeholdings.com)
E I	00043714	AquaLine Pure Water Services, Inc.	Jeff Long (test@periscopeholdings.com)
	00030144	Columbus Scuba Inc	Andrew Silverman (test@periscopeholdings.com)
	00017720	Angel-GUARD Products, Inc.	Michael Shea (test@periscopeholdings.com)
à.	00004840	BRAN-ART, Inc.	Andrew Braun (test@periscopeholdings.com)
	00036424	Cutter Enterprises LLC	Patrick Dwyer (test@periscopeholdings.com)
	209332	Boston Data Group, Inc.	Walter Corcoran (test@periscopeholdings.com)
—	00003837	Agathos Laboratories, Inc.	Paul Momoh (test@periscopeholdings.com)
	00002951	D.O.T. FLEETPARTS	JACK BELLAN (test@periscopeholdings.com)
a	229881	Apollo Safety Inc	Tracy Carvalho (test@periscopeholdings.com)
n -	00000862	7 Generations Inc	Loretta Marino Sanford (test@periscopeholdings.com)
	200146	A and A Industrial Supply / ALBECO Fastener, Inc.	Ted Noble Morang, Sr. (test@periscopeholdings.com)
<u>a</u>	00032157	Brave Industrial Paint LLC	Luciane Giaculi (test@periscopeholdings.com)
	00001737	Atlantic Tactical, Inc.	Tom Caruso (test@periscopeholdings.com)
	00000204	Alliance Detective & Security Service, Inc.	Scott Cummings (test@periscopeholdings.com)
	00016986	Bass Pro Outdoor World LLC	Christine Marques (test@periscopeholdings.com)
	00033328	Blank Industries, LLC	Erin Williams (test@periscopeholdings.com)
星	00008101	ApproMed Corp.	Oliver Udemba (test@periscopeholdings.com)
	300199	Communications International.Inc.	Lisa Benincasa (test@periscopehoidings.com)
_	00000913	Body Armor Outlet, LLC	Raymond Bellia (testi@periscopeholdings.com)
	00035888	Capewell Aerial Systems	Tracy White (test@periscopeholdings.com)
	00029700	Bane	William Bane (test@periscopeholdings.com)
FR	219394	Brigham Industries, Inc.	jody Bagdis (test@periscopeholdings.com)
a l	00017178	2-Way Communications Service, Inc.	Nicholas Hamel (test@periscopeholdings.com)
	216361	All Sports - Heroes Uniforms, Sporting Goods & Promotions	Charles E. Kuenzler (test@periscopeholdings.com)
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