Solicitation Training (Part 1)

Periscope

Agenda

- Overview
- Creation
- Setup
- Items
- Attachments
- Bidders
- Internal Communication
- Questions
- Publication

Buy4Michigan

Overview

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Overview – What's a Bid?

Bid documents enable Basic Purchasing (BP) users in Buy4Michigan to conduct solicitations. BP users complete Bids by defining the solicitation process to be used, indicating the relevant dates, creating the item(s) that can be bid upon, identifying vendors to notify, and attaching the appropriate terms, conditions, instructions, etc.

Once approved, Bids can be published on the web to enable electronic response by registered vendors. After the response time has ended, Bid responses can be viewed, evaluated and awarded via the Bid Tab.

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Bid documents in Buy4Michigan allow Basic Purchasing users to conduct all types of solicitations for products and services, including Invitations for Bid (IFB), Requests for Information (RFI), Requests for Proposal (RFP), Requests for Quote (RFQ), etc. Through the system, bids can be submitted, approved and published to the web for online vendor response. Responses can be viewed and evaluated, and awards can then be made within Buy4Michigan.

Buy4Michigan

Overview – Bid Documents

Document Type	Purpose	Created By
Bid	• Conduct solicitations • Create and publish solicitation amendments • Close response period • Access a link to the **Bid Tabulation (Bid Tab)** document after a Bid is opened and ready for evaluation	• Basic Purchasing
Bid Tab	• View and evaluate solicitation responses • Request clarifications and revisions to responses • Recommend responses for award • Convert awards to purchase orders and contracts • Not the same as State Administrative Board "Bid Tab Form"	• Basic Purchasing (automatically created by closing response period)
Amendment	• Create and apply solicitation amendments	• Basic Purchasing
Quote	• Respond to a solicitation	• Seller

During the course of a solicitation, a series of documents will be created. The table displays the various Bid documents that can be created and describes who can create them and what functions they support.

Overview – Bid Types

Bid Types	Description
Open	Open Bids are those that allow any registered vendor in Buy4Michigan to submit a response. Open Bids are also viewable to users without a login ID from the Login Screen using the **Open Bids** link.
Closed	Closed Bids are visible only to those vendors originally notified of the Bid upon publication. Only these vendors will be able to submit a response through the system.
Formal	Formal Bids do not allow Basic Purchasing users to end the response period prior to the identified Opening Date/Time without a formal Bid Amendment. Therefore, vendors are able to respond electronically through the system up until the Opening Date/Time, and Basic Purchasing users are unable to view any submitted responses until this time as well. Bids are "formal" by default. No action is required to make a Bid formal. Formal Bids can be either Open or Closed.
Informal	Bids marked as Informal allow Basic Purchasing users to view vendor responses prior to the close of the response period. An Informal Bid can be either Open or Closed.

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Buy4Michigan does not differentiate between solicitation methods, meaning that the Bid document does not operate differently based on what type of solicitation you are conducting, except in the case of the Reverse Auction, which will be discussed later. Instead, you must make clear through the items you add, external documents you attach and other settings you specify what type of response you expect from bidders.

However, Buy4Michigan does allow you to configure certain behavior on each Bid by selecting a **Bid Type** and designating a Bid "formal" or "informal." The above table describes each available Bid Type.

Overview – Bid Statuses

Status Code	Status Name	Description
2BI	In Progress	The document is still being completed by the originator. It is still editable by the originator and any Basic Purchaser supervisor with rights over them.
2BRA	Ready for Approval	The document has been submitted and travelling down the approval path. The originator and approvers can edit only the Bidders and Attachments at this status.
2BRT	Returned	The document was returned to the originator by an approver prior to being published. The Bid can be "Re-Opened" to "In Progress" status, edited and re-routed for approval by the originator.
2BR	Ready to Send	The document has been approved and is awaiting the originator to send notification about the Bid to selected vendors and post on the Buy4Michigan login screen (if desired). The document can only be edited via an Amendment.
2BS	Sent	Notification regarding the Bid has been sent to selected vendors and posted on the Buy4Michigan login screen (if desired). Vendors are now able to submit electronic responses. The document can only be edited via an Amendment.
	Ready to Open	The Bid has reached its configured Opening date and time. Vendors can no longer submit electronic responses. The document can only be edited via an Amendment.
2BO	Opened	The vendor responses to the Bid can now be viewed by the originator and any BP supervisor over them. The evaluation process occurs on the Bid Tab at this status.
2BE	Evaluated	All Bid items have been recommended for award by the Basic Purchaser and are now awaiting approval.
2BA	Approved	The award recommendation of all Bid items has been approved. These items are now waiting for the Basic Purchaser to convert them into one or more Purchase Orders.
2BPO	Bid to PO	All Bid items have been awarded and transferred to a Purchase Order. Participating Vendors can now see the Bid Tab and any attachments on it.
2BC	Cancelled	The Bid has been cancelled by the originator or an approver.

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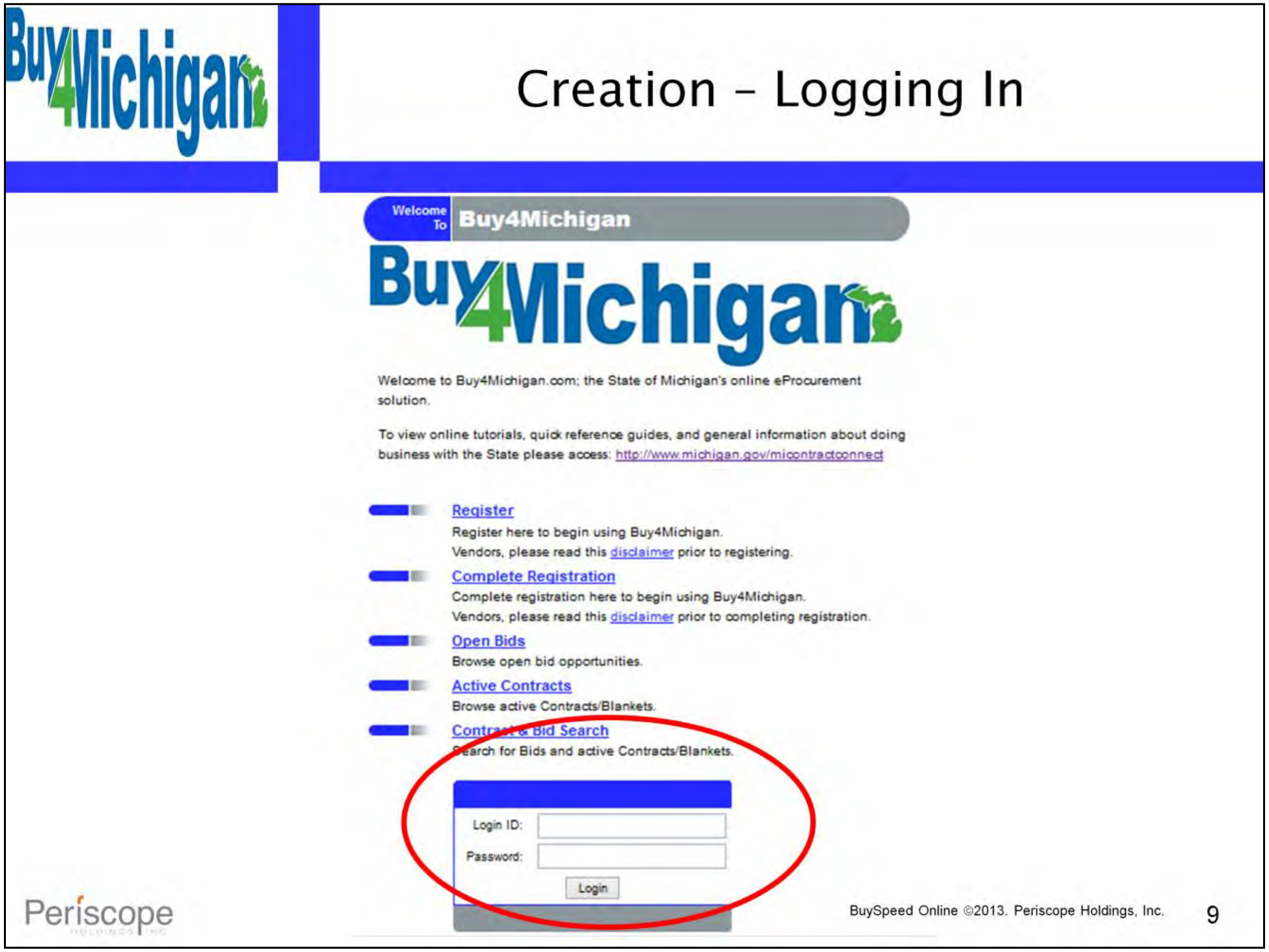
As Bids are processed, their status changes in order to allow/disallow various functions associated with the document. This table displays each possible status of a Bid and what functions each status supports.

The first status a bid document will have is **In Progress**, which means that it's being worked on. After being submitted for approval, it's marked as **Ready for Approval**. If it is disapproved, it will be marked as **Returned**, at which point the originator can resume work on it (taking it back to *In Progress*). If it is approved, it will be marked as **Ready to Send** until the originator sends it to selected vendors, after which it will be marked as **Sent.** Once the opening date is reach, it will be marked as **Ready to Open**. After it is opened it is marked as **Opened**. Similarly, bids are marked as **Evaluated** and **Approved** when those steps have been completed. After approval, when bids have been converted into one or more Purchase Orders, they are marked as **Bid to PO**. If a bid is at any point cancelled, it is marked **Cancelled**.

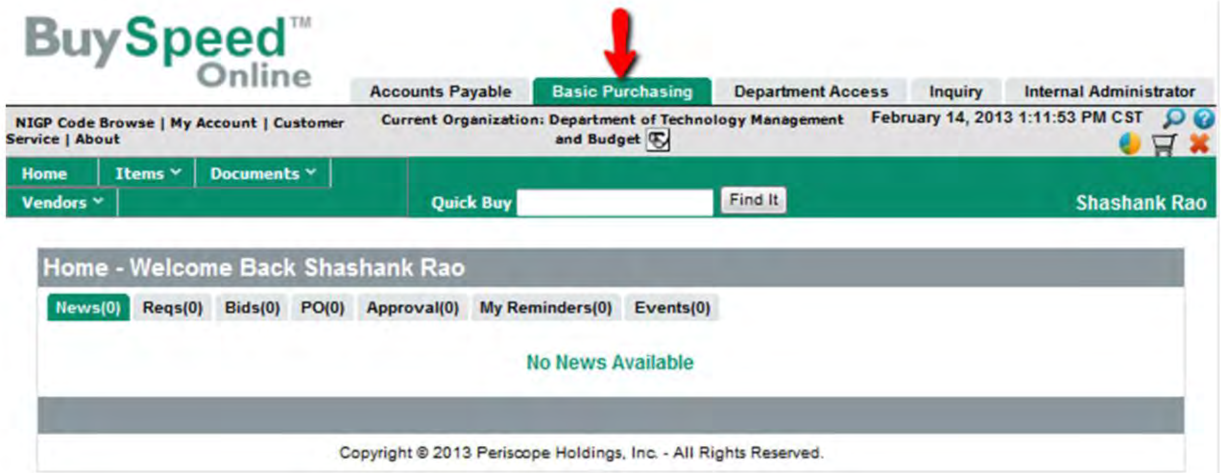
Creation



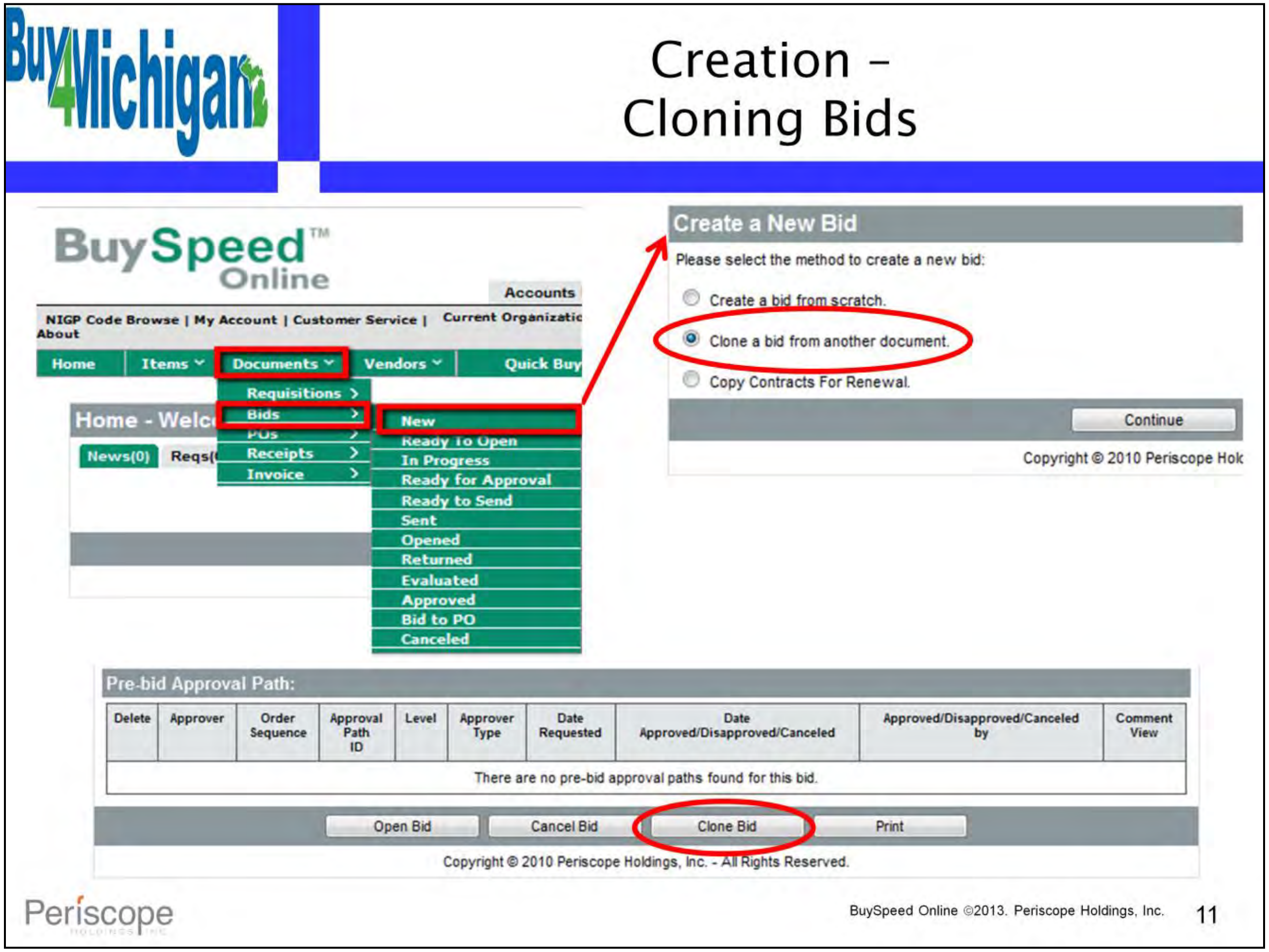
Before you can create a new document, you must login to Buy4Michigan. To login to Buy4Michigan, input your email address into the “Login ID” field and the password you were given by an administrator into the **Password** field. Next, either hit **Enter** on your keyboard or click the **Login** button. Note that your login ID is not case sensitive but your password is.

The initial password you receive is temporary. The first time you login, you’ll be asked to reset your password to something that only you know. Keep your password private, as your login ID and password constitute your electronic signature within Buy4Michigan on any actions you take in the system. Passwords must be a minimum of 8 characters and contain a combination of letters and numbers. You will be required to update your password periodically based on State security standards and may not re-use the same password each time.

Creation – Basic Purchasing Role



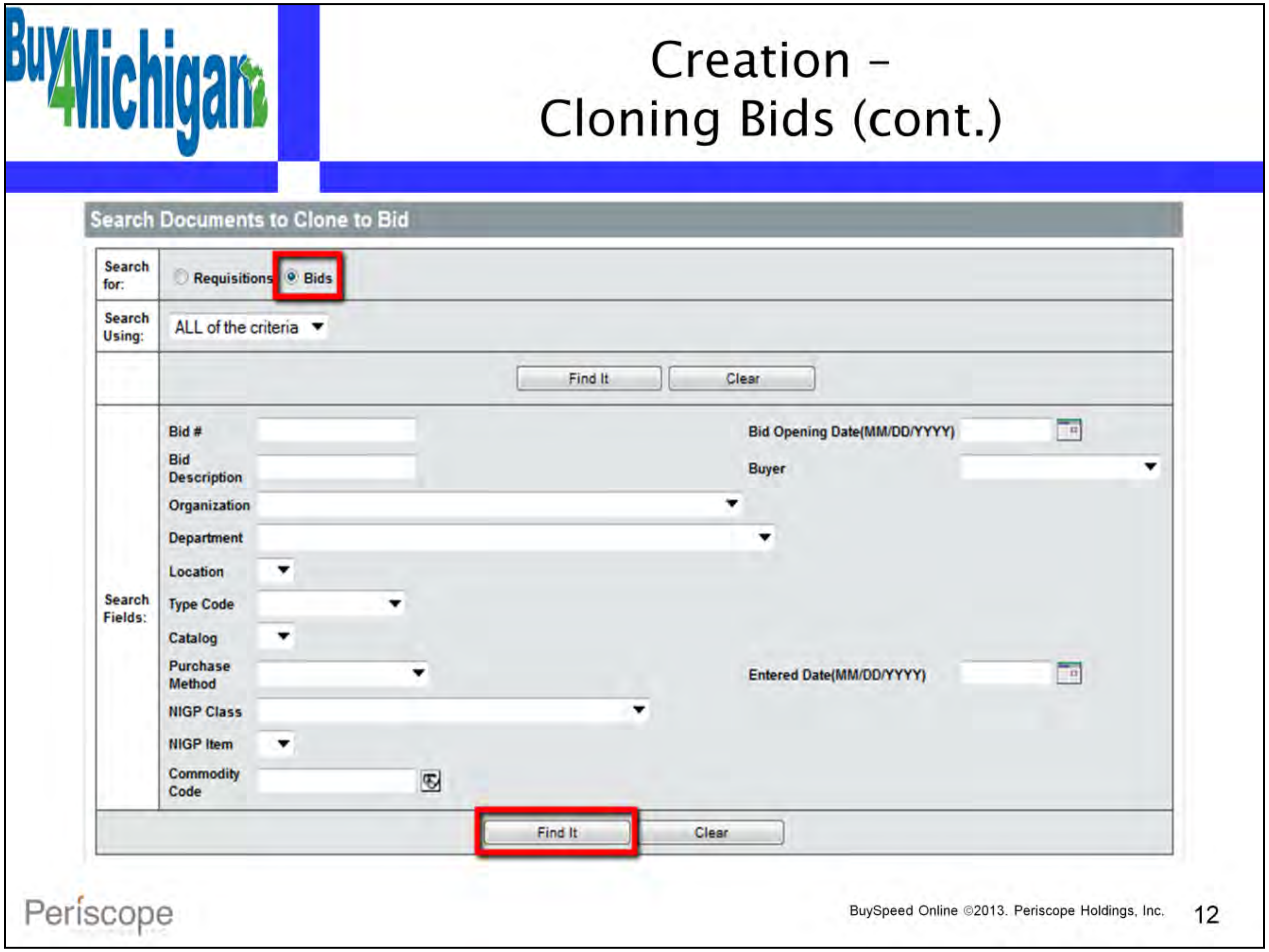
Once logged in, if you have access to multiple roles, ensure that the Basic Purchasing role is currently selected in order to enable the creation of a new Bid. If you only have access to the Basic Purchasing role, there won't be a selection of different roles to choose at the top of the screen as seen here.



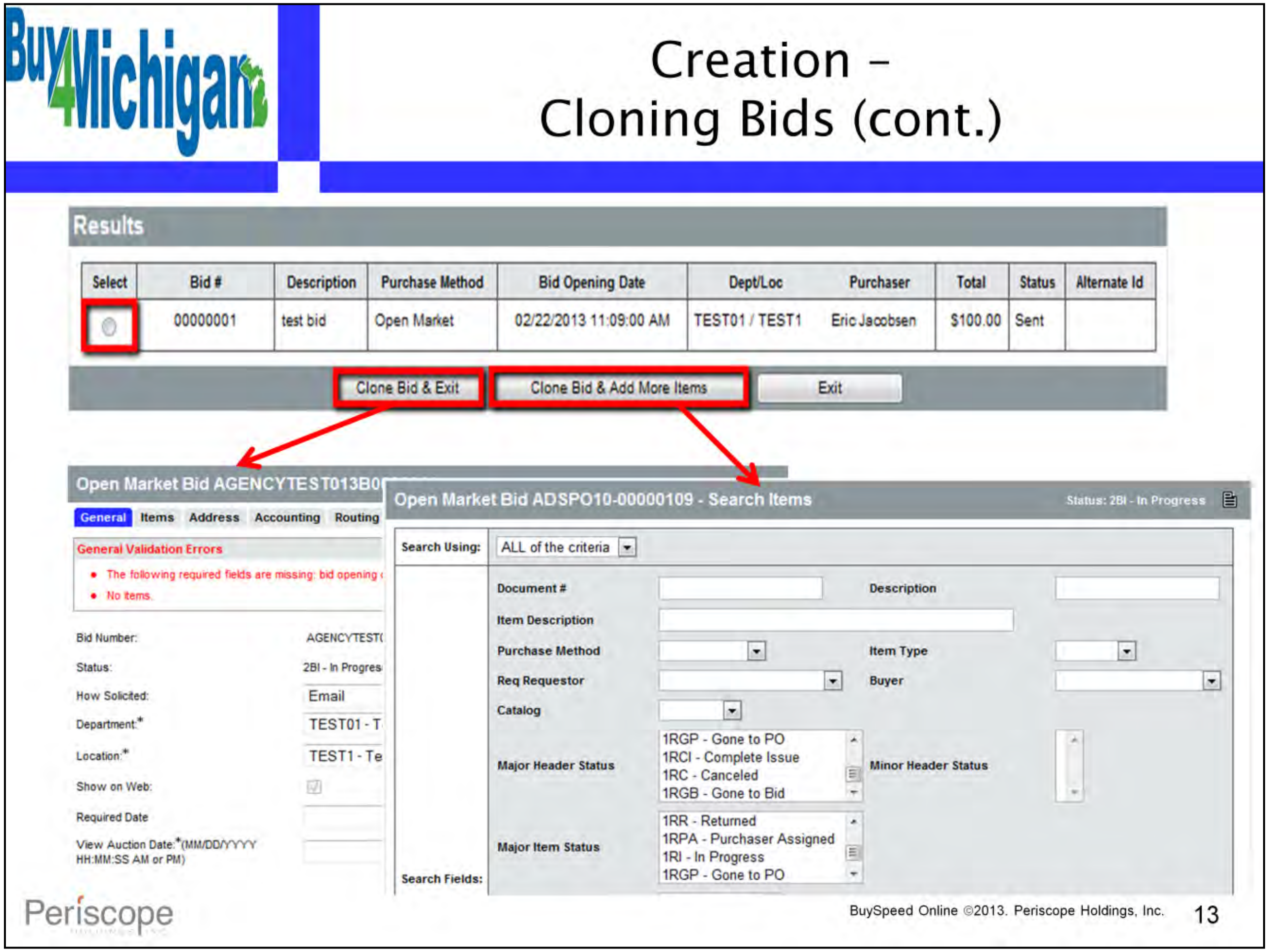
One method for creating new Bids is to clone an older Bid. Cloning a document makes a new copy of the document, enabling you to leverage the information that was already entered on the original, but giving you the ability to edit anything where necessary.

To search for a Bid to clone, use the **Documents** dropdown in the colored Navigation Bar along the top of the screen. Within the dropdown, hover your mouse over **Bids**, then select **New** to display the **Create a New Bid** screen. Select **Clone a bid from another document** and click **Continue** to proceed with searching for the Bid to clone.

Any older Bid can also be cloned by accessing it and clicking the **Clone Bid** button along the bottom of the Summary tab.

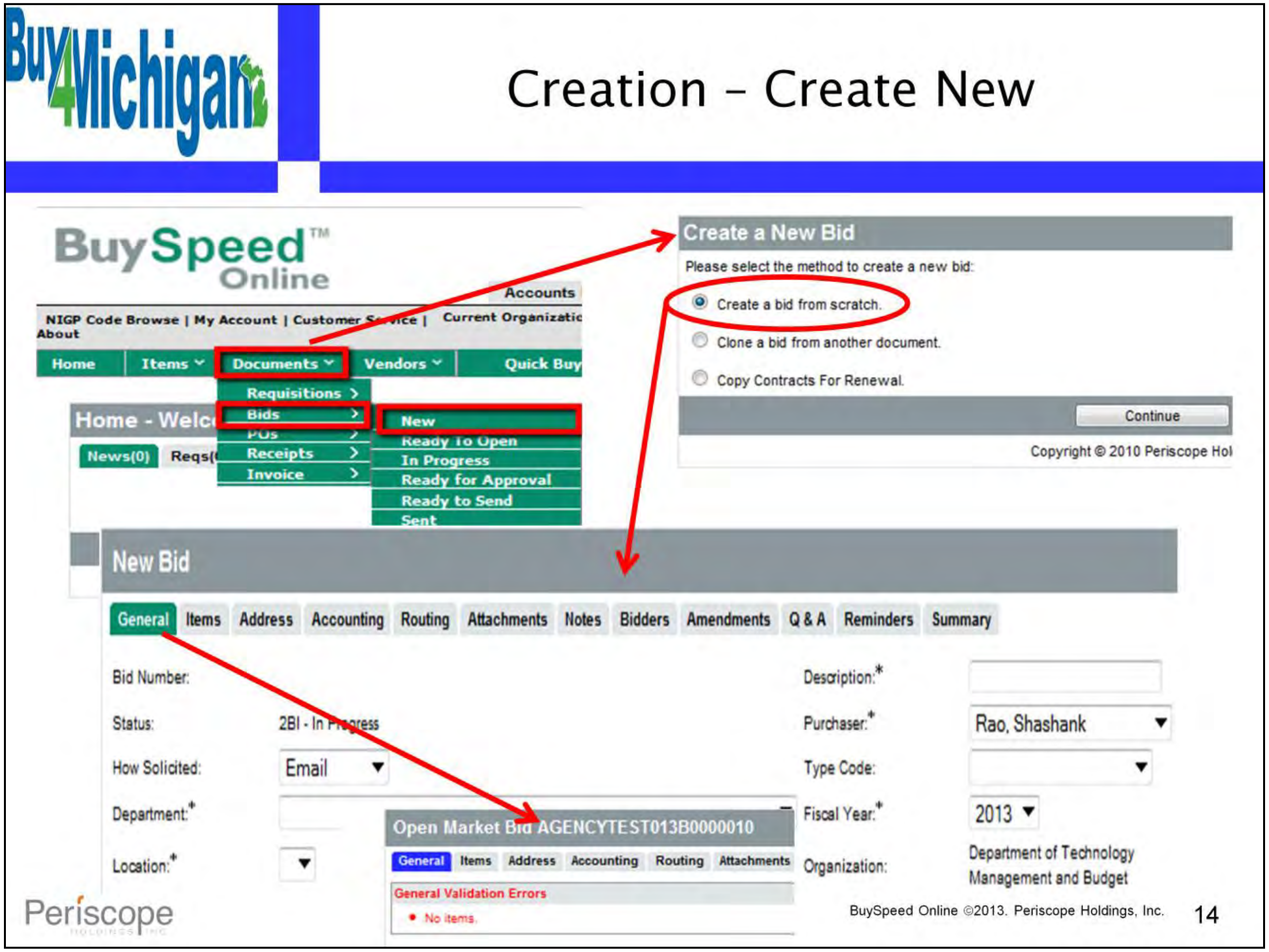


Upon selecting **Clone a bid from another document**, you will be shown the **Search Documents to Clone to Bid** screen. First, select Bids in the **Search for** field. This will determine the **Search Fields** you will have available to use to find the document to clone. The search feature here functions identically to the **Advanced Search** feature – enter your search criteria and click **Find It** to return matching results below.



Once your search results return, click the button in the **Select** column next to the document you would like to clone.

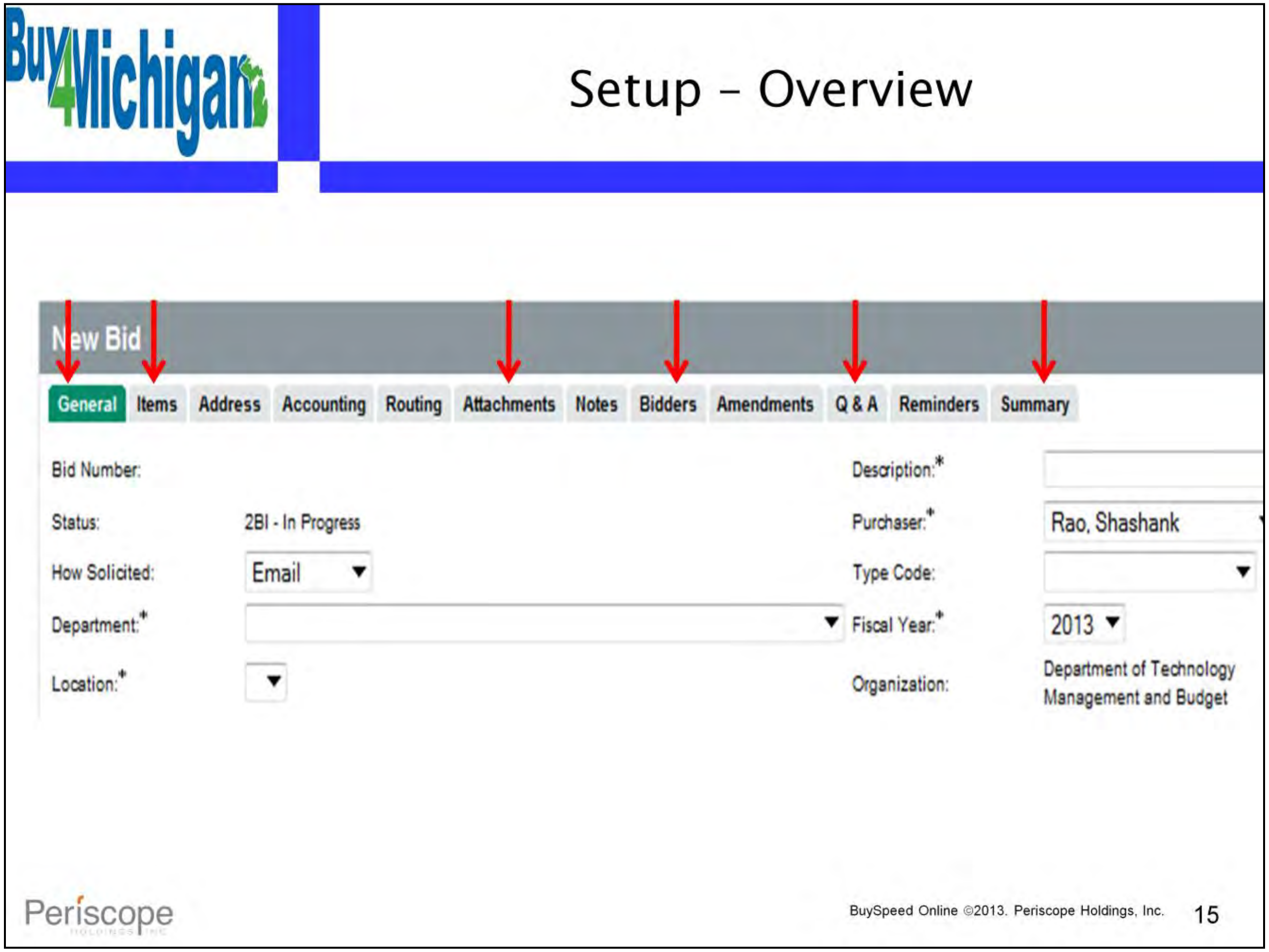
Selecting the **Clone Bid & Exit** button will immediately display the General tab of your new Bid allowing you to begin editing the document. Selecting **Clone Bid & Add More Items** creates your new Bid, but first displays another search screen enabling you to find and add any item to your Bid that has previously appeared on a Buy4Michigan Bid for your Organization. This provides you with the ability to copy previously defined items without having to build them again. You can find and select items using the same process that you used to find the document you just cloned. Once you've added the desired items, you'll be taken to the General tab of your new Bid.



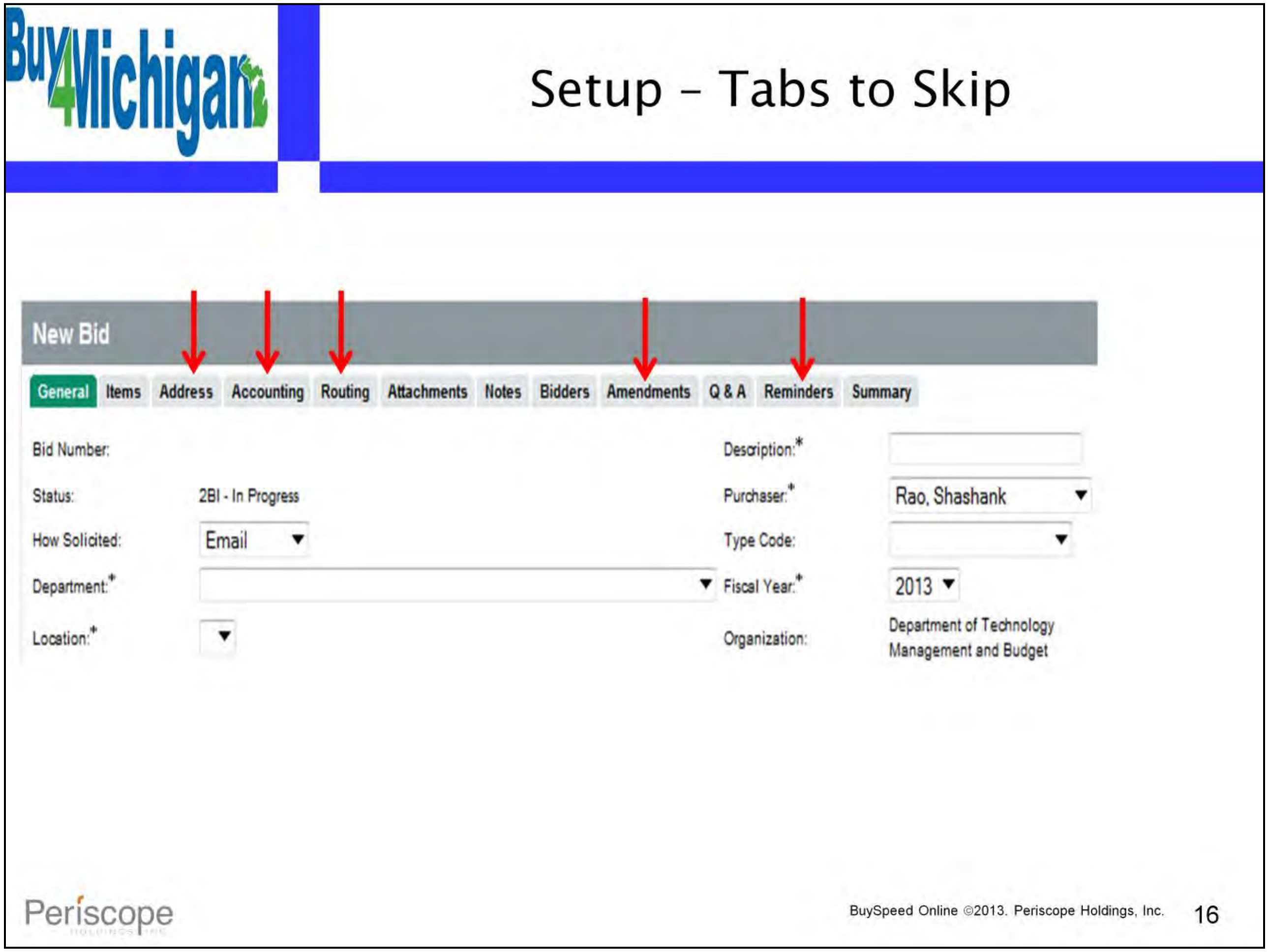
The final method for creating a Bid is to start a new Bid from scratch. To do this, you'll again use the Documents dropdown in the colored Navigation Bar, hover over Bids and select **New**, which displays the **Create a New Bid** screen. This time, click the radio button next to **Create a bid from scratch** and select **Continue**. The General tab of your blank new Bid document will display.

Unlike cloned documents, new documents are not immediately assigned a number, meaning that they are not established documents that permit you to leave and access them later. In order to have a number assigned and be able to access the document later, you must first complete the required fields on the General tab and save. Bid documents will contain your organization ID, Department ID, 2-digit Fiscal Year, the letter “B” for “Bid” and a unique system-generated number.

Note: If desired, users can copy and paste text into any blank fields in Buy4Michigan.



The process for completing any document in Buy4Michigan is to work through the tabs along the top of the document, completing all required fields (marked by the *), then reviewing and submitting the document for approval via the Summary tab on the far right. The highlighted tabs are those that you will want to ensure you have completed before submitting any Bid. This presentation will cover each of these required tabs in detail shortly.



A few of the tabs on the Bid do not need to have any information input on them during the setup process and can be skipped over.

- The Address tab shows Ship-to and Bill-to address information for the Department/Location selected on the General tab. The default Ship-to and Bill-to address information on the Address tab is determined by the user's default address settings maintained by the Internal Administrator role in BuySpeed. This information can also be maintained at the item level (see Items Address tab).
- The Address and Accounting tabs have no effect on the solicitation process. If the result of the solicitation is a one-time purchase, this information will transfer over to the awarded Purchase Order document, saving you from having to re-enter the intended ship-to and bill-to address. Accounting is typically not tracked on Bids and will not be used in Phase 1.

- The Routing tab simply displays the approval path information for the Bid, but not until the document has been submitted for approval.
- Similarly, the Amendments tab displays information about all amendments to the solicitation and allows you to create new amendments, but not until the Bid has been published.
- The Reminders tab is also optional, allowing users to create Reminders within the system for themselves or other users to perform related tasks.

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General

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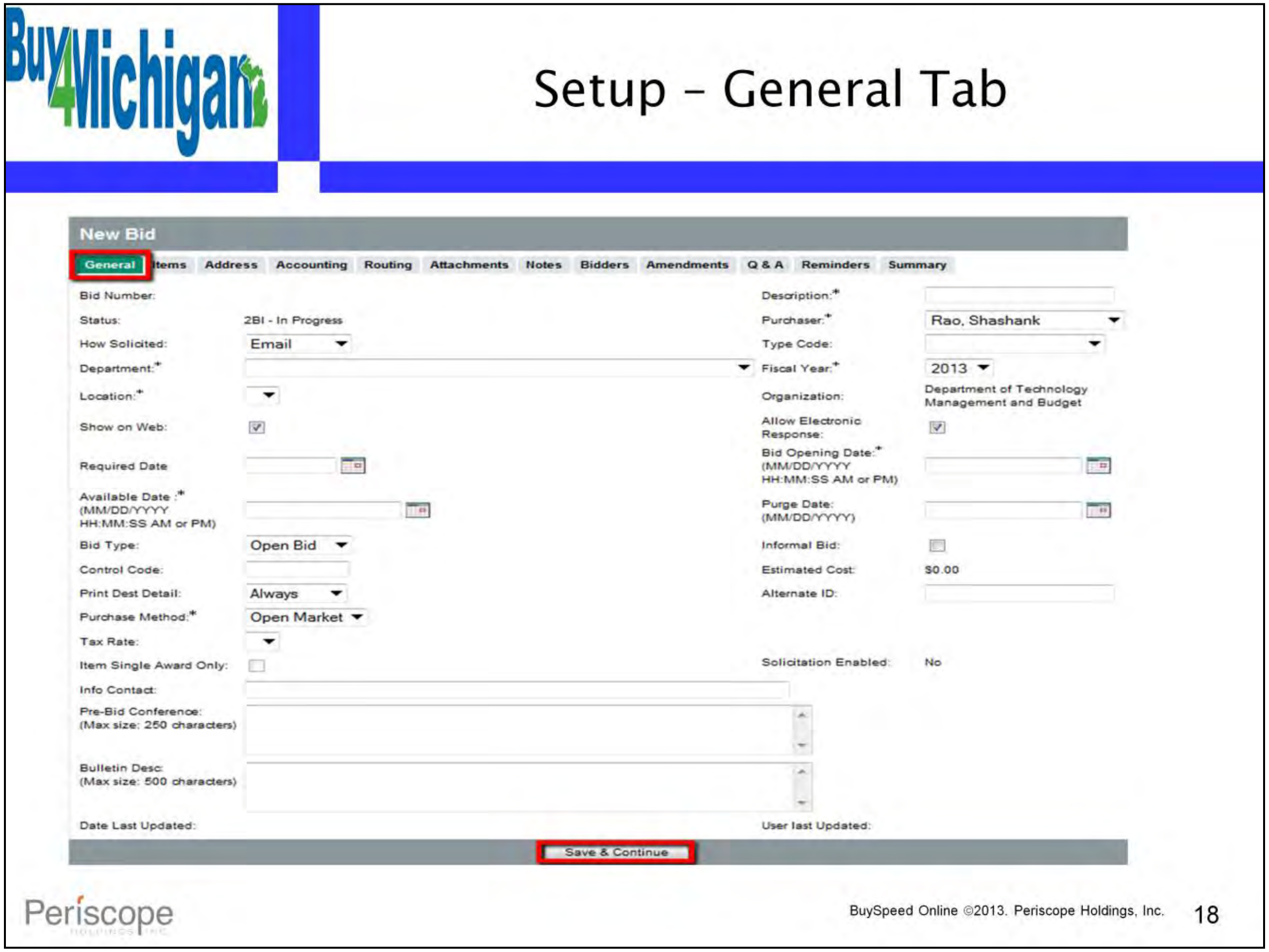

The General tab of the Bid document is where you describe the solicitation, input the important dates regarding the solicitation and determine how the solicitation will be conducted. For Bids created from scratch, you must complete this tab and click **Save & Continue** before being able to select the other tabs to complete the Bid document.

Displayed is just the top portion of the General tab for new Bids featuring the standard fields that are available, in addition to any custom columns that are added by your administrators.

Setup – General Tab Standard Fields

Field	Description
Description*	Short description of the Bid. 100 character limit.
Purchaser*	The Basic Purchasing user that owns the document.
Type Code	Select the type of Bid you will be conducting and aside from Reverse Auction, is for reporting / informational purposes only. Types include: Reverse Auction (RA) Invitation to Bid (ITB) Letter of Information (LOI) Request for Information (RFI) Request for Quote (RFQ) Request for Proposal (RFP) Pre-Qualification (PQL) Proprietary Bid (PRB)
Department / Location	The business unit for whom the solicitation is being conducted. For statewide contracts, this can be the business unit conducting the solicitation. This is filled in based on the Purchaser's default setting but can be edited.
Show on Web / Allow Electronic Response	Both fields are checked by default, and will display bids based on the **Bid Type** selected. See **Bid Type** descriptions below. If either field is unchecked you will not be able to publish / complete your solicitation online. **Note**: Buy4Michigan does not require an electronic response. If you require electronic response, you will need to include documentation to that effect later in the solicitation process.
Bid Opening Date*	The date and time that the solicitation will no longer accept electronic response from vendors and the assigned Purchaser can "Open" the Bid and review the submitted responses.
Available Date*	The date and time the solicitation will be visible, if **Show on Web** is checked..
Bid Type*	Open Bids allow any registered vendor to view and submit a response, even those not originally notified of the bid upon publication. They are also viewable to users from the Login Screen **Open Bids** link. Closed Bids allow only those vendors originally identified in the bid to receive notice to view and respond when logged in.
Informal Bid	When checked, the Purchaser can view the vendor responses as submitted.
Purchase Method*	The intended purchase method of the resulting contract. Open Market is a one-time purchase. Blanket and Contract are term contracts and will require you to enter in an estimated Begin and End Date. The Purchase Method can be changed on the resulting contract, so is usually left at "Open Market." **Do not use Contract during Phase 1.**
Info Contact	Contact information shared with vendors regarding the solicitation.
Pre-Bid Conference	Information regarding the Pre-Bid Conference, if applicable.
Bulletin Description	Longer description of the Bid.

The standard fields on the General tab govern vendor access and response to the solicitation and the schedule of the solicitation. The table describes each of the primary standard fields you're likely to use each time you create a Bid. Fields with an asterisk are required.

Note that the **Pre-Bid Conference** field displays from the **Open Bids** link on the Login screen.

Setup – General Tab Standard Fields (cont.)

Field	Description
How Solicited	Describes how you intend to notify vendors of the solicitation opportunity. If you are using Buy4Michigan to publish the Bid, you will want to keep the default setting of "Email."
Required Date	The date that the solicited goods/services must be provided by. Note that vendors may use this as grounds to increase their price quote. If it is not absolutely critical that goods/services be provided by a specific date, then it is recommended that this field be left blank.
Purge Date	This field will not be utilized by the State.
Control Code	The Control Code field enables agencies to identify the document by an alternate number used internally. Control Code is NOT a search field available when using the Advanced Search feature, so we recommend using the Alternate ID field.
Print Destination Detail	This field will not be utilized by the State.
Alternate ID	The Alternate ID field enables agencies to identify the document by an alternate number. Alternate ID is a search field available when using the Advanced Search feature.
Print Format*	**Ignore this field.**
Item Single Award Only	**Ignore this field.**

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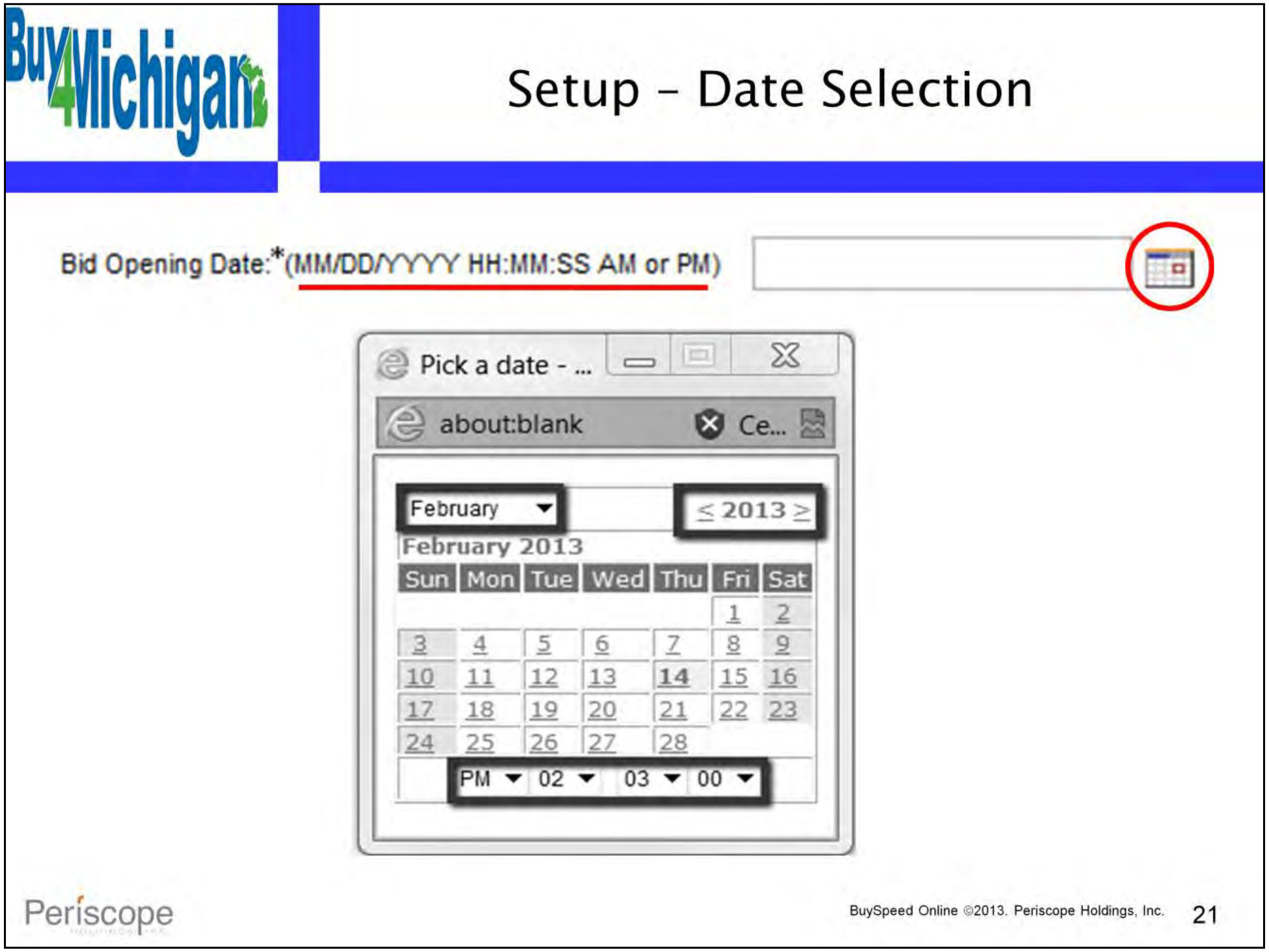
Other fields appear on the General tab which you are generally unlikely to use. The table describes each of these rarely used standard fields.

If you're completing a PreQual Bid, use the Alternate ID field to enter the Prequal program.

Suggested uses of the Alternate ID field include entry of Prequal Programs or ITRAC numbers.

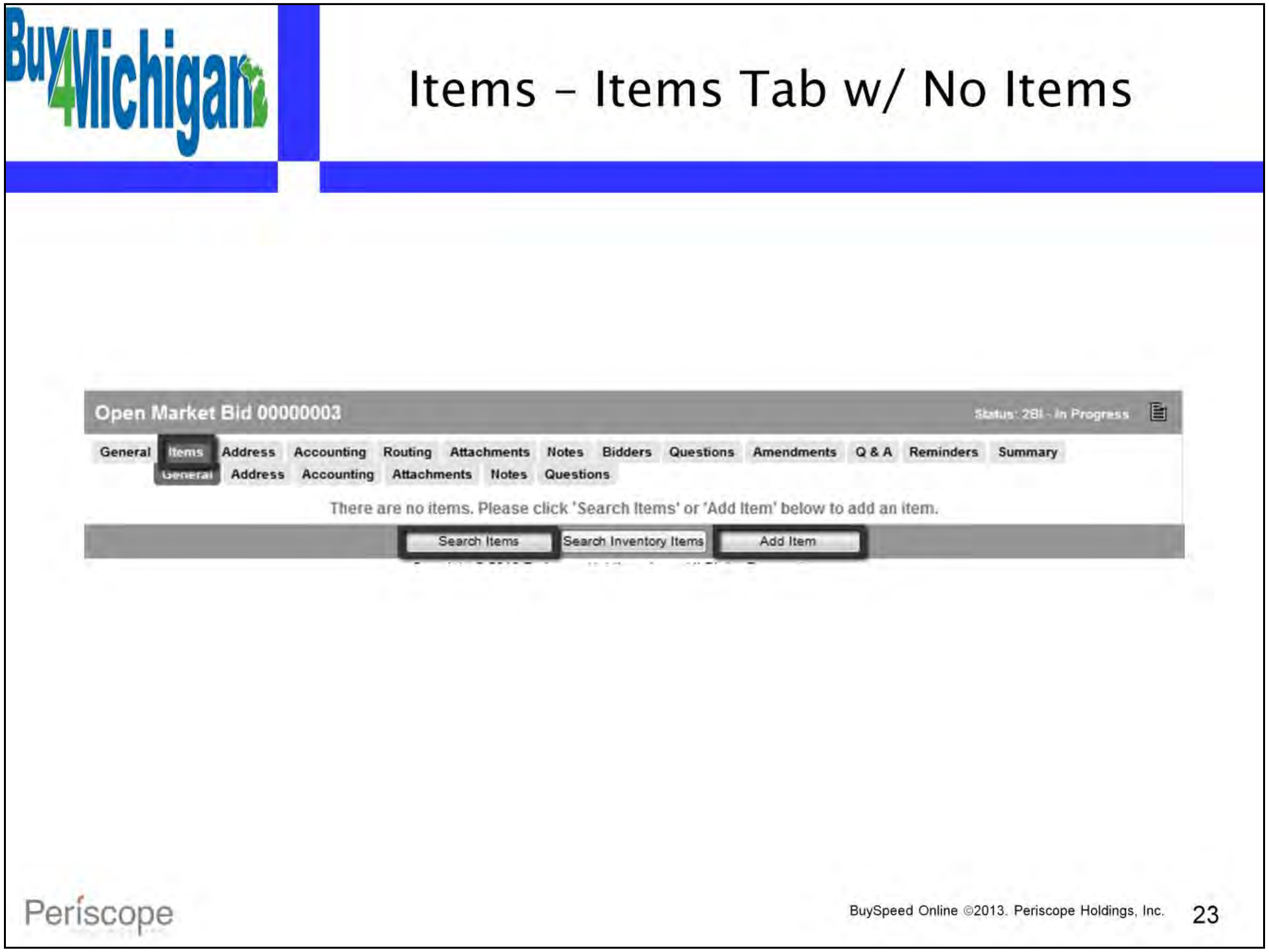


Many of the fields you must complete on the General tab of Bids require that you input a date and time. Dates can be entered in one of two ways. The first is by clicking the **calendar icon** next to the field. This will display a pop-up window featuring a calendar. First, select the correct month and year at the top. Next, select an appropriate time at the bottom. Once you select a date in the calendar, the pop-up window will close and the date selected will appear in the field, so it is advisable to select this field last. (If you select it too early, you can simply click the calendar icon again and fix any incorrect details, or use the second method described below).

The second method for entering a date and time is simply to type it into the field. In order for the system to acknowledge what you have entered however, it must match the format included in parentheses next to the name of the field - (MM/DD/YYYY HH:MM:SS AM or PM).

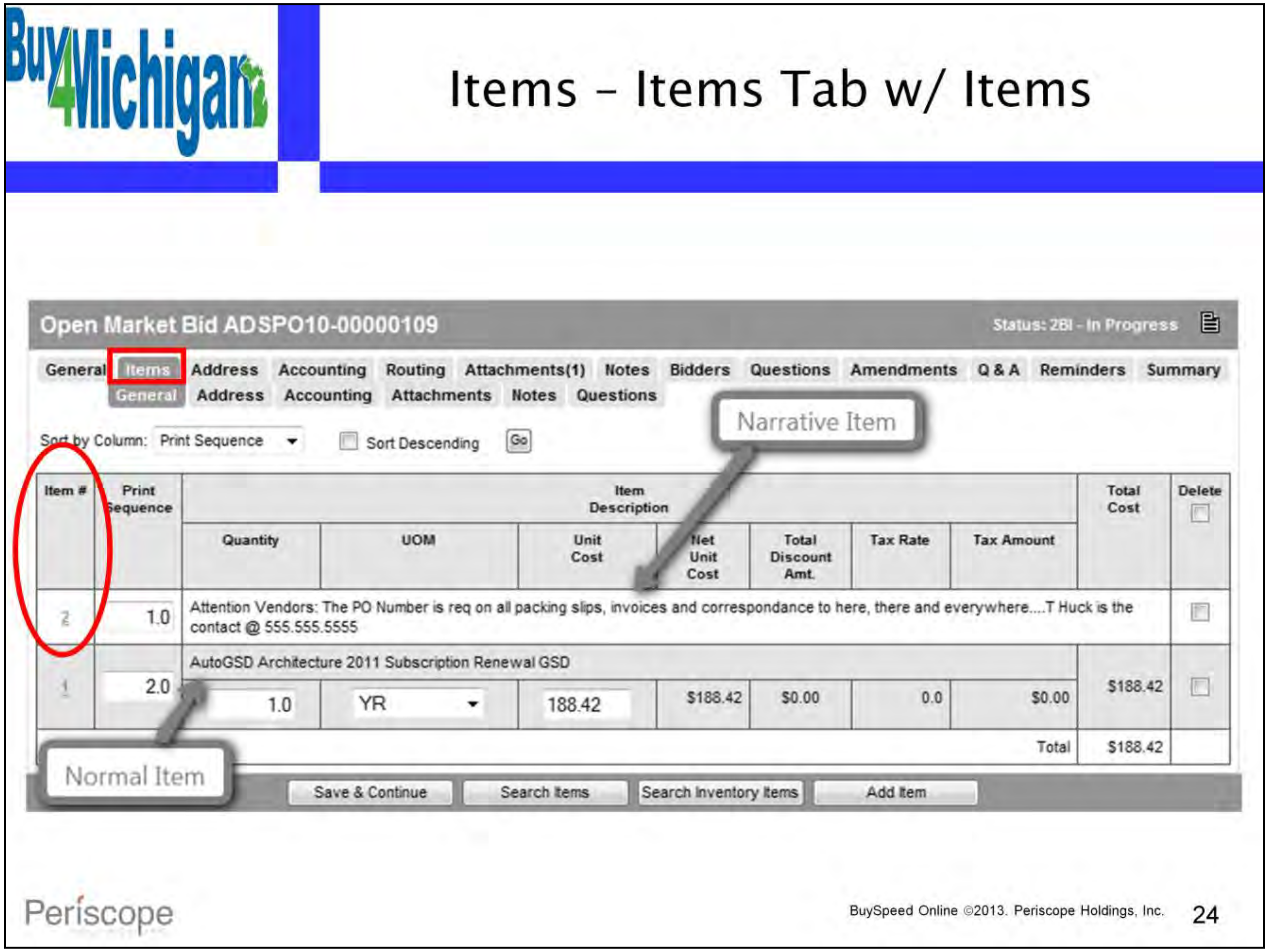
Note that when selecting the **Bid Opening Date**, the system cuts off vendors' ability to submit a Quote at the exact time selected. Therefore, in order to allow vendors to submit their Quote at 3:00pm, you must enter a time of 3:01pm.

Items



The next tab to view and complete is the Items tab. The Items tab displays the goods/services that will vendors will provide price quotes for in their responses to the solicitation.

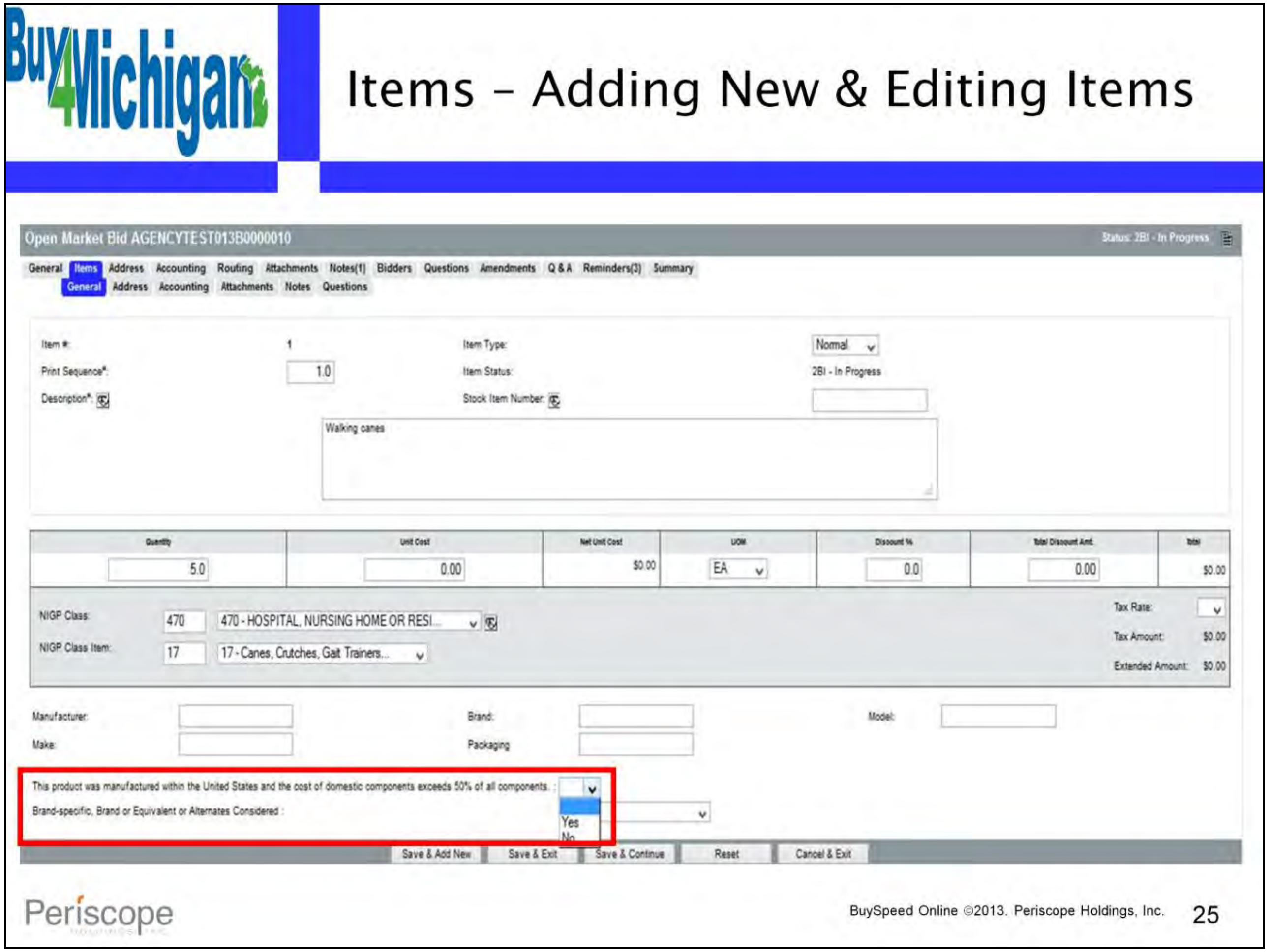
The process of defining the line items for your Bid will vary depending on whether you converted your Bid from an existing Bid, or created it from scratch. If you created the Bid from scratch, the above screen will display with the message "**There are no items. Please click 'Search Items' or 'Add Item' below to add an item.**" Note that the **Search Inventory Items** button will not be used.



If you created this Bid by cloning a previous one, the Items tab will initially display the items from the original Bid. Once you have items on your Bid, from the Items tab you can access each item's details in order to edit them, delete items, and change the sequence of items. To edit an item, click the link next to the item in the **Item #** on the far left.

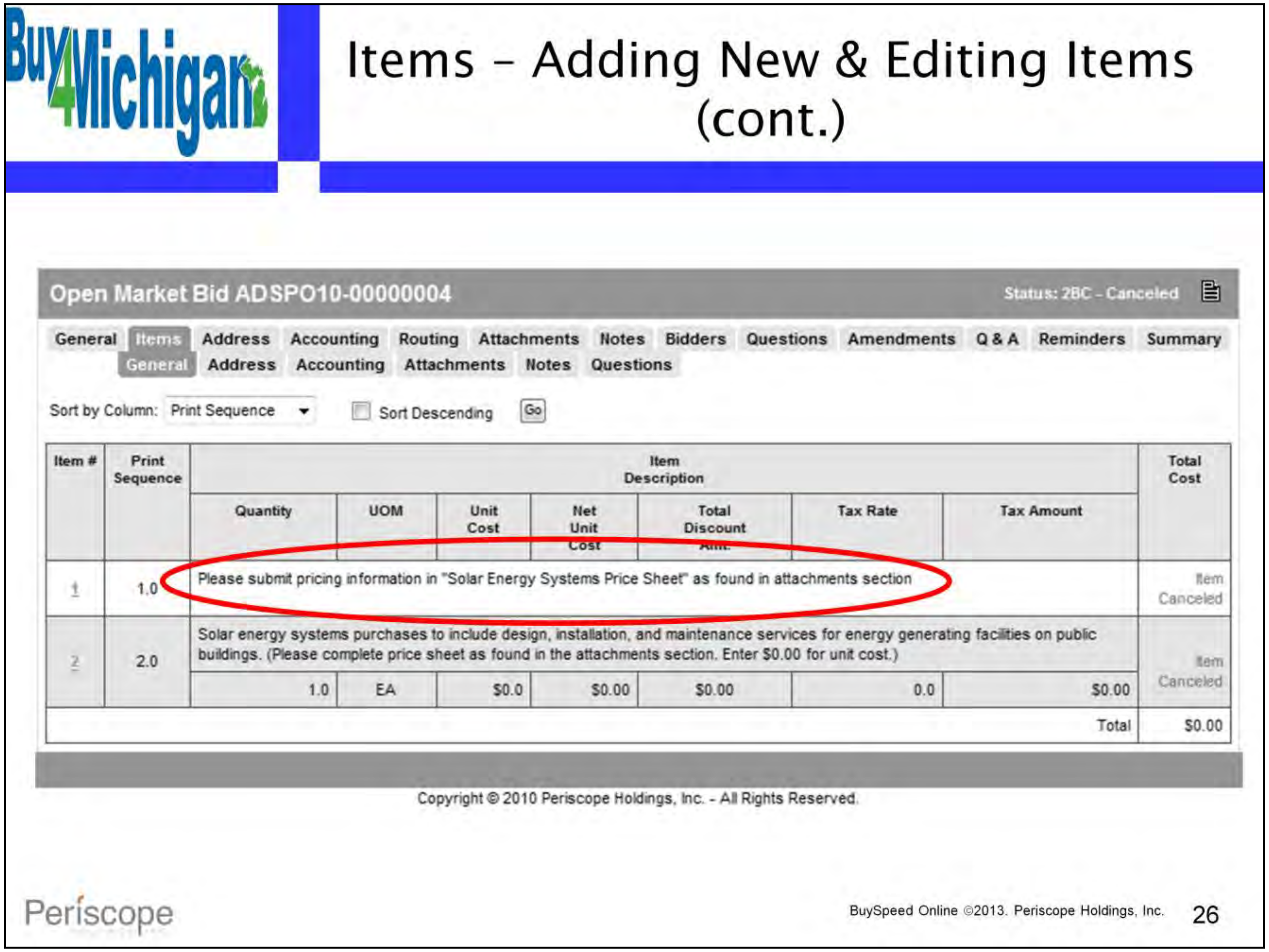
This example shows two types of items commonly used. On the bottom is the "Normal Item," or a good/service that will be bid upon (every Bid must have at least one "Normal" item). On top is a "Narrative Item," which does not represent something being ordered but is instead used to provide detail or instructions when necessary to aid in the solicitation of the Normal items.

As you build and edit items on your Bid, it is important to remember that these items will automatically transfer over to the resulting PO/contract(s), enabling customers to search for and request these items. Therefore, where possible, it is advised that items be built to help facilitate the ordering process by making item descriptions as detailed as possible including terms that customers will likely use to search for these items.



Upon selecting **Add Item** or an **Item #** on the Items tab, a screen within the Items tab that allows you to define every aspect of an item will display. The screen will appear blank if you are adding the item, allowing you to create a new item in the system. Selecting an existing item on the Items tab will display the current information for the item, allowing you to edit it.

Note the custom fields on the bottom. One field allows the specification of to what extent a product and its components are manufactured domestically. Another field allows the specification of whether this is brand specific, or whether brand or alternates will be considered. During Phase 2, if data is loaded (what is called “downloading history” in Bid4Michigan), these custom fields will have to be manually designated, as the data load does not support custom fields.



Note that Buy4Michigan does allow you to edit the items on contract(s) resulting from your Bid before they are orderable, including allowing you to load a standardized price sheet. **This means that you can setup items that do not match up with specific orderable goods/services on the Bid, but still change them on the resulting contract.**

For instance, if you are soliciting a large number of unique items, it may not be feasible to create a new item within Buy4Michigan for each of them. In this case, you may request that vendors complete a price sheet as part of their response to the solicitation, providing specific information for each item that will be orderable. If so, it is advised that you provide them with the standard Buy4Michigan price sheet to complete, which can be uploaded into your resulting contract after award, automatically creating the line items that customers are then able to search and request. The example displays how the user setup a Narrative item on their Bid to request that bidders complete a price sheet form attached to the Bid.

In Phase 2, when Requisitioning functionality is implemented in Buy4Michigan, instead of attaching price sheets, Basic Purchasing users will be able to upload these as Excel spreadsheets.

Items – Adding New & Editing Items: Standard Fields

Field	Description
Item Type*	Can be either "Normal" or "Narrative." Normal items can be bid upon while Narrative items cannot. Narrative items only permit you to enter a **Description** and a **Print Sequence**.
Print Sequence*	The order the items will appear to vendors. The default sequence is the order that the items are added to the document.
Description*	The definition of the good or service to be bid upon. For Narrative items, the Description can be instructions or other information.
Quantity*	The total number of the item you require.
Unit Cost	Your estimate for the cost of one unit of the item. This is <u>automatically hidden from vendors</u> and can be left at 0.00.
UOM*	The unit of measure for the item.
Discount %	Your estimated discount percentage for each unit of the item. This field is optional. You cannot enter both a **Discount %** and **Total Discount Amount**.
Total Discount Amount	Your estimated dollar discount for each unit of the item. This field is optional. You cannot enter both a **Discount %** and **Total Discount Amount**.
NIGP Class*	The 3-digit NIGP Class code for the item. You can either type in the code, select a code from the dropdown, or use the eyeglass icon to conduct a keyword search for the appropriate code.
NIGP Class-Item*	The 2-digit NIGP Class-item code for the item.
Commodity Code	The 11-digit NIGP Detail code for the item. Use the **Lookup Commodity Code** button to search for the appropriate code. This is an optional field. Most agencies will not use this field.
Tax Rate	**Ignore this field.**
Manufacturer / Brand / Model / Make / Pckg	The desired product details. These fields are optional.

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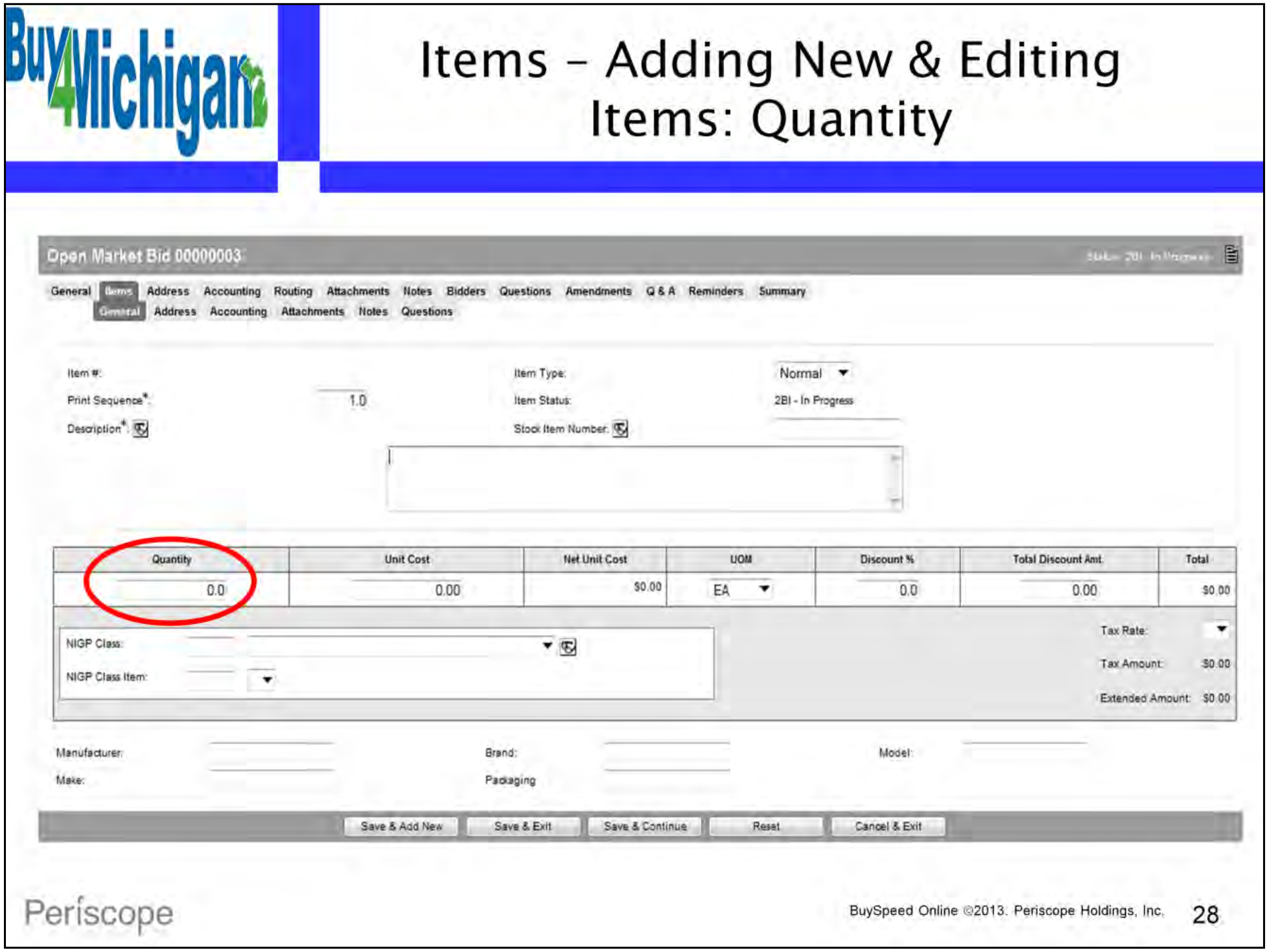
The standard fields available when adding items to every document enable you to define the product or service that you would like to source. The table describes each of these fields. Fields with an asterisk are required.



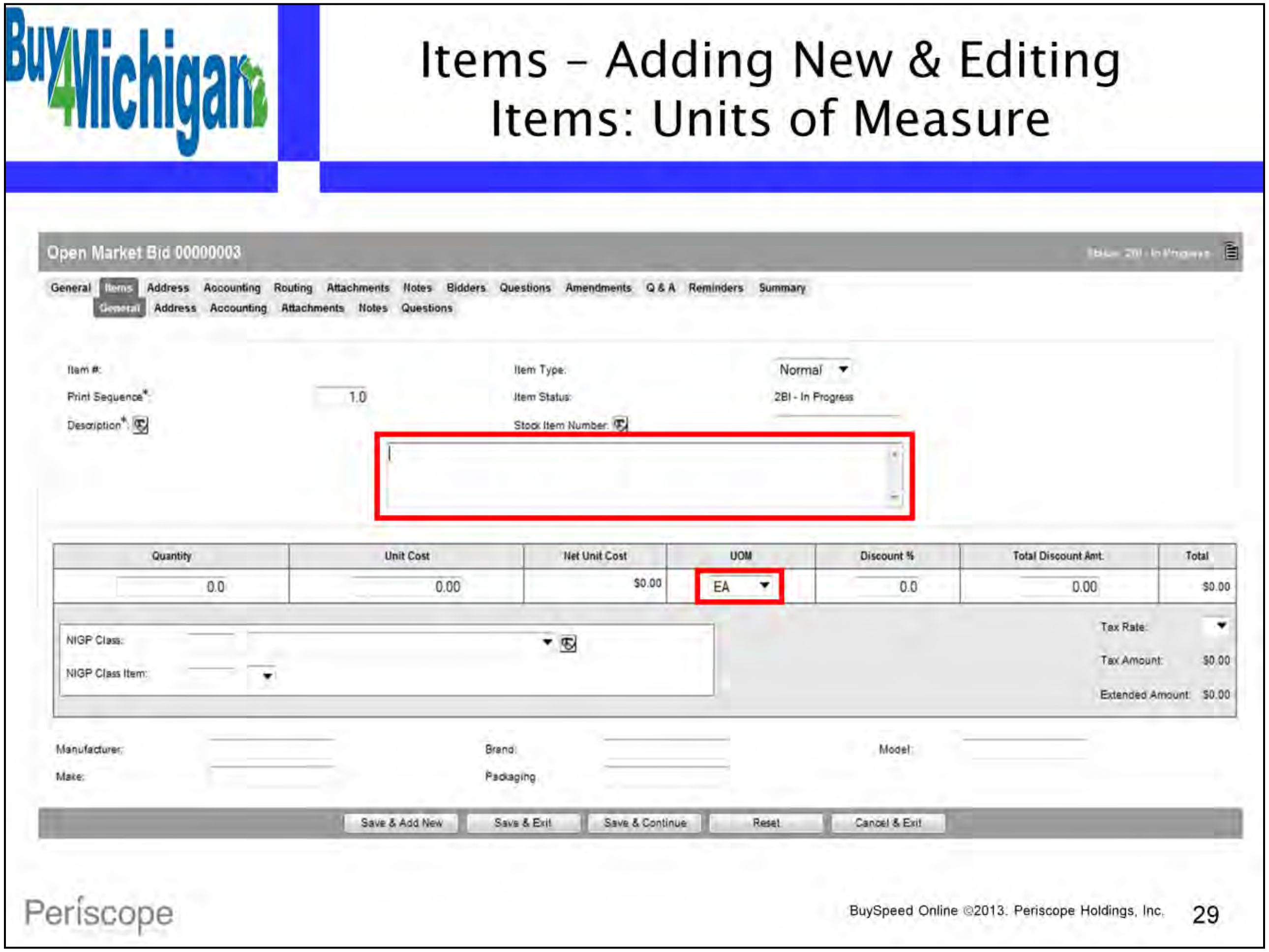
A quantity must be provided for every Normal item on your Bid. If you do not know the quantity of an item that will be needed, there are a few different methods for communicating to vendors how to respond:

• If an indefinite or unknown quantity is needed, you can input a quantity of “1,” which will allow you to compare vendors’ price for a single unit of the item. It is advised that you include in the **Item Description** field either the minimum expected quantity, or that an indefinite quantity is being requested.

• If you would like to allow vendors to provide pricing based on differing quantities (e.g. 1-99, 100-999, 1000+), then you can either create a separate line item for each quantity grouping, input a quantity of “1,” and in the **Item Description** field either provide your own quantity groupings or tell vendors to provide the quantities matching their quoted price in the **Alternate Description** field available to vendors on their Quote documents.

• If you wish to allow vendors to completely define their various price breaks by quantity, you can have them complete a Price Sheet that you attach to the Bid outlining what they charge for ordering various quantities of the item. For this method, it is advised that you setup a Narrative item to point vendors to the attached Price Sheet. **It is also important to remember that at least one “Normal” item must be included on your Bid, and**

vendors must provide a price quote for an item in order to be available for award. If necessary, you can setup one general item and direct vendors in the description of the item to provide a price quote of $0.01.

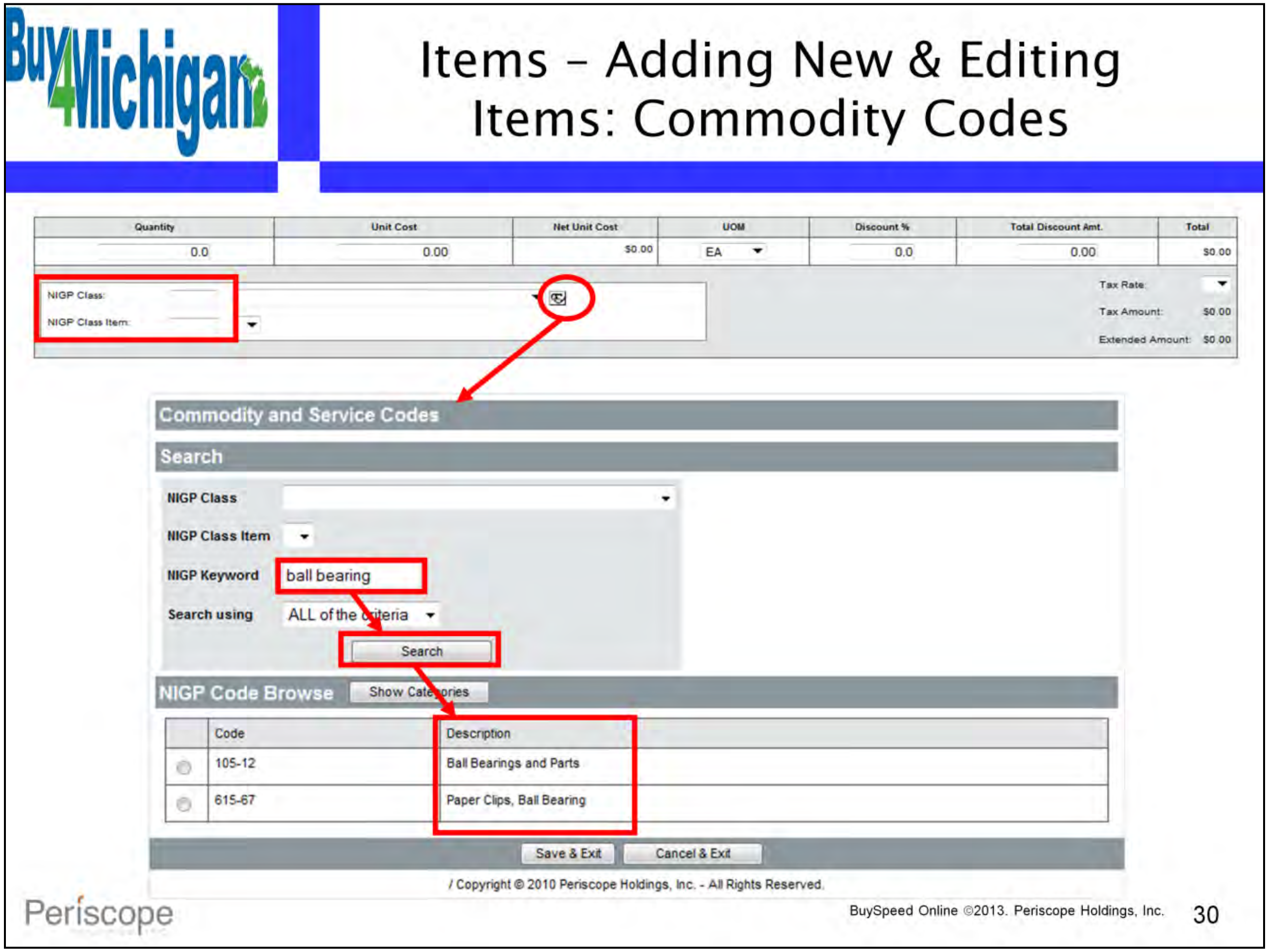


A unit of measure must be also provided for every Normal item on your Bid. If you do not know the unit of measure of an item that will be needed, or if multiple units of measure are suitable, there are a few different methods for communicating to vendors how to respond:

• If the unit of measure is unknown, you can input “EA” (each), which will allow you to compare vendors’ price for a single unit of the item. It is advised that you explain in the **Item Description** field that that vendors can express an alternate unit of measure in the **Alternate Description** field available on vendors’ Quote documents.

• If you would like to allow vendors to provide pricing based on differing units of measure (e.g. each, package, box), then you can either create a separate line item for each possible unit of measure, and in the **Item Description** field explain to vendors that they should only provide price quotes for the units of measure they are able to provide.

• If you wish to allow vendors to define the various units of measure they offer, you can also have them complete a Price Sheet that you attach to the Bid outlining what they charge for ordering various units of measure of the item. For this method, it is advised that you setup a Narrative item to point vendors to the attached Price Sheet. **It is also important to remember that at least one "Normal" item must be included on your Bid, and vendors must provide a price quote for an item in order to be available for award.** If necessary, you can setup one general item and direct vendors in the description of the item to provide a price quote of $0.01 or to select **No Charge**.

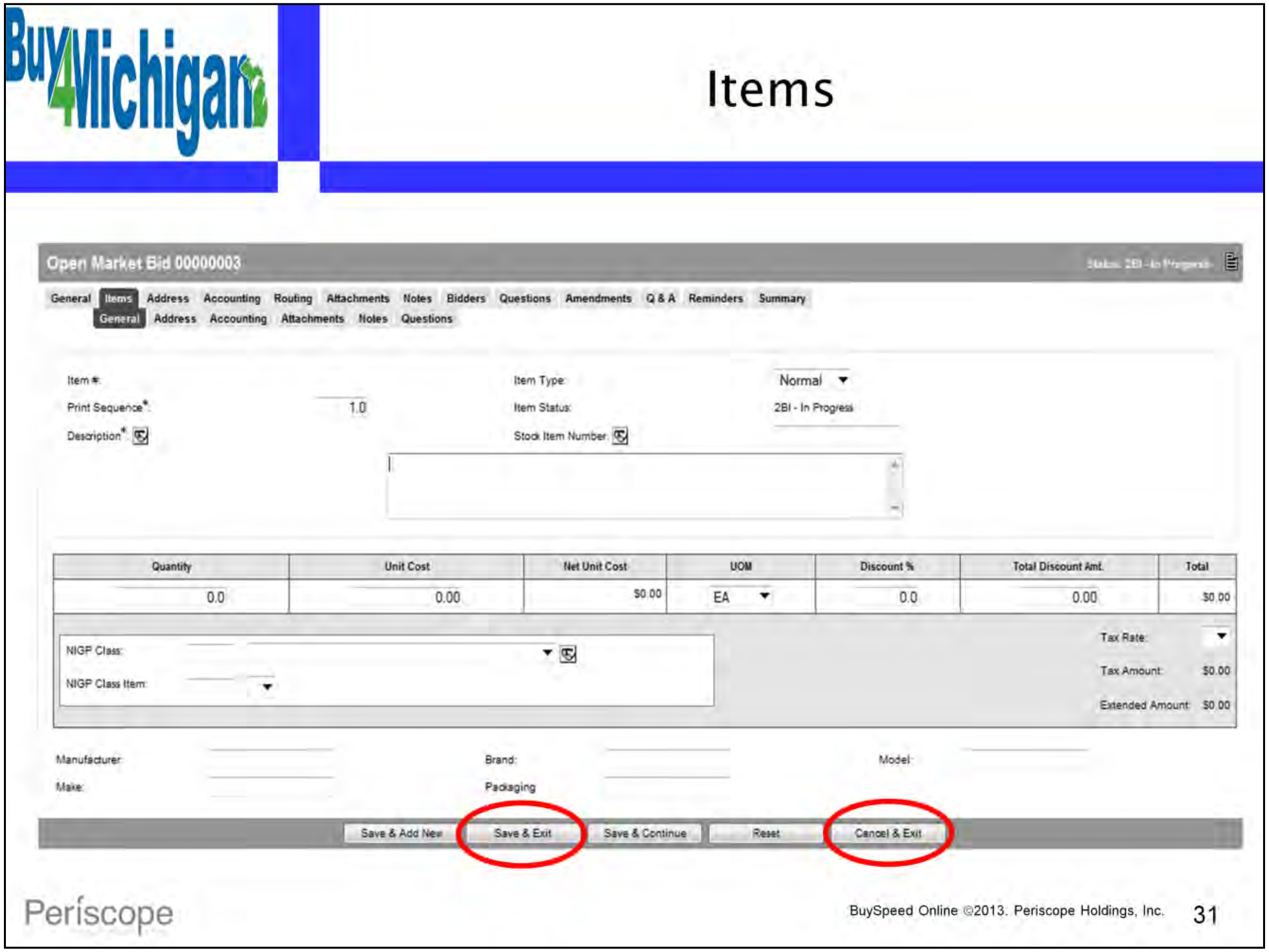


A 5-digit commodity code must be selected for each Normal item that you create. There are 2 ways to select a commodity code:

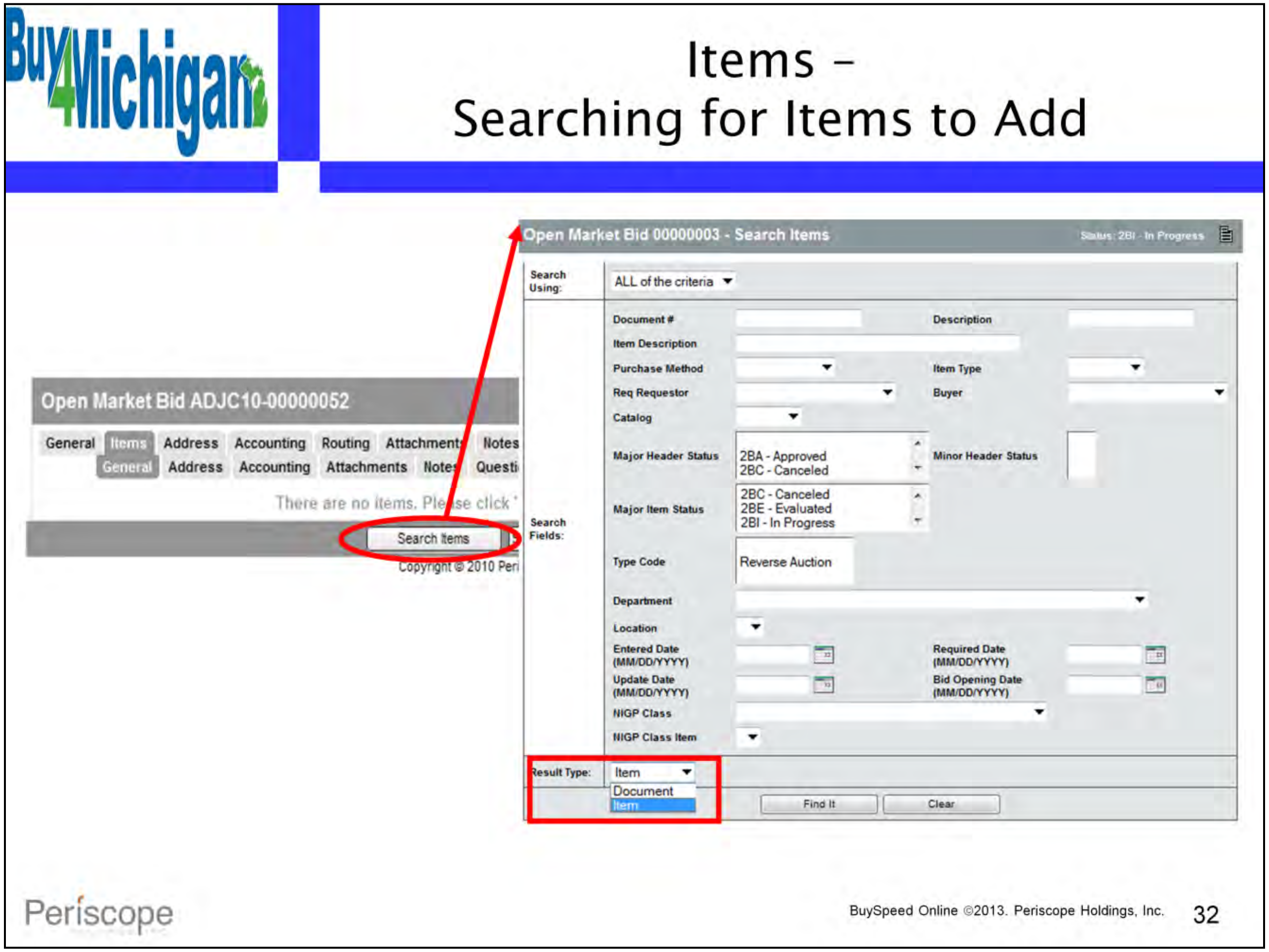
• If you already know the code you wish to use, you can simply type it into the **NIGP Class** and **NIGP Class Item** fields or you can select it from their associated dropdown boxes.

• If you do not know the appropriate code for the item, you can conduct a search by selecting the eyeglass icon next to the **NIGP Class** dropdown. Selecting this will open a pop-up window displaying the **Commodity and Service Codes** screen. You can conduct a search by typing information into the **NIGP Keyword** field and clicking **Search**. All commodity code descriptions containing the word(s) you've entered will appear. Once you select a code and click **Save & Exit**, the pop-up window will close and the selected code will automatically populate the **NIGP Class** and **Class Item** fields.

Also note that the commodity codes selected for the items on your Bid can be used to automatically produce a bidders list. Therefore, it is advised that you setup items with commodity codes that will include as many vendors as possible. However, you can also build your bidders list manually by searching for vendors registered with codes not associated with items on your Bid. This process is covered in the **Bidders** section of this training.

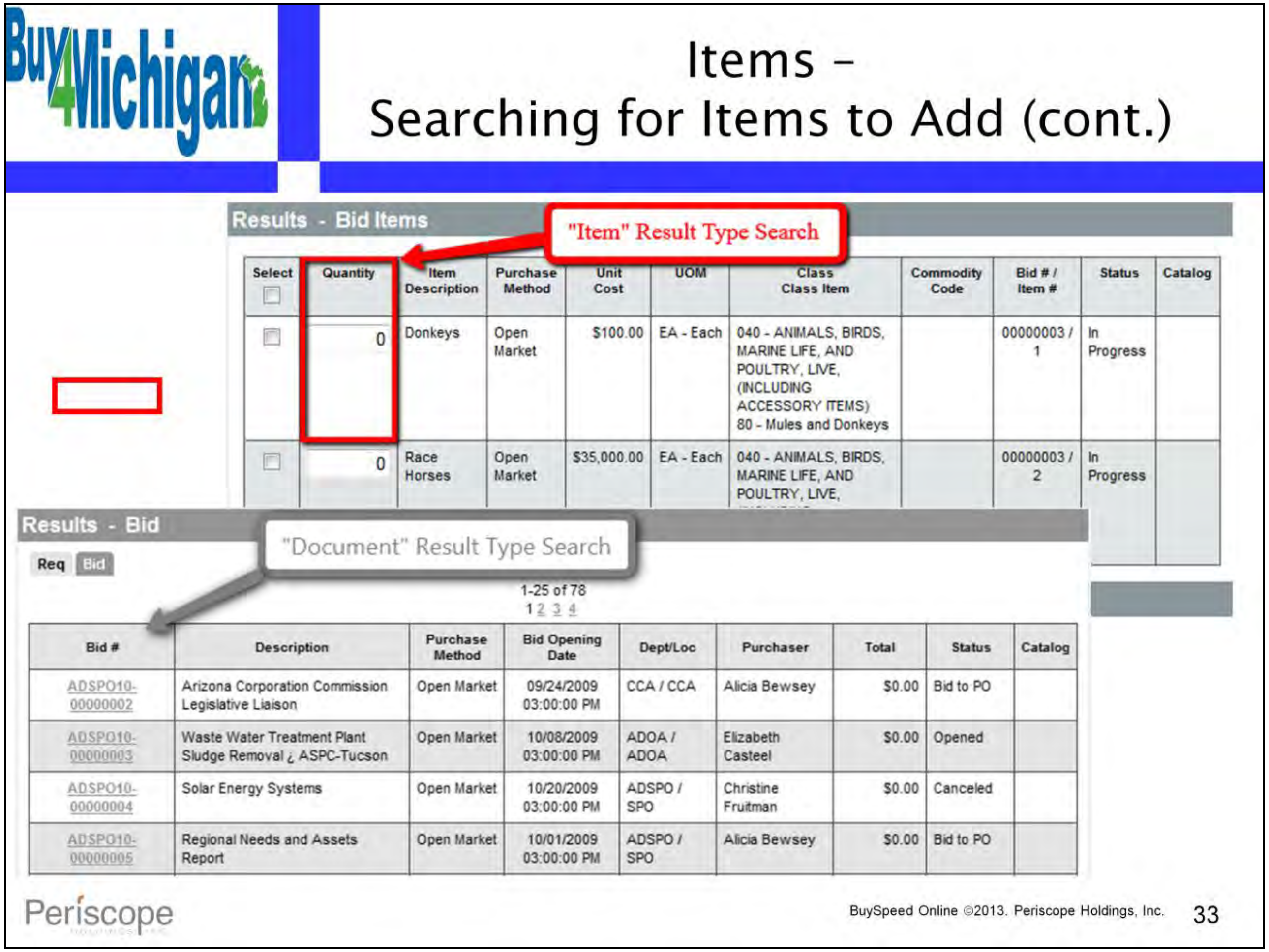


Once you've entered data in the desired fields, including all required fields, you may select from the standard button options below, as well as a **Save & Add New** button. This button allows you to save the item you've just completed, then refreshes this screen to allow you to define another new item. If there are any issues regarding the data you've entered, a pop-up window will let you know what needs to be corrected before you will be allowed to save. Once you've selected one of the **Exit** buttons, the Items tab will refresh and a list of all the items currently on your Bid will display.



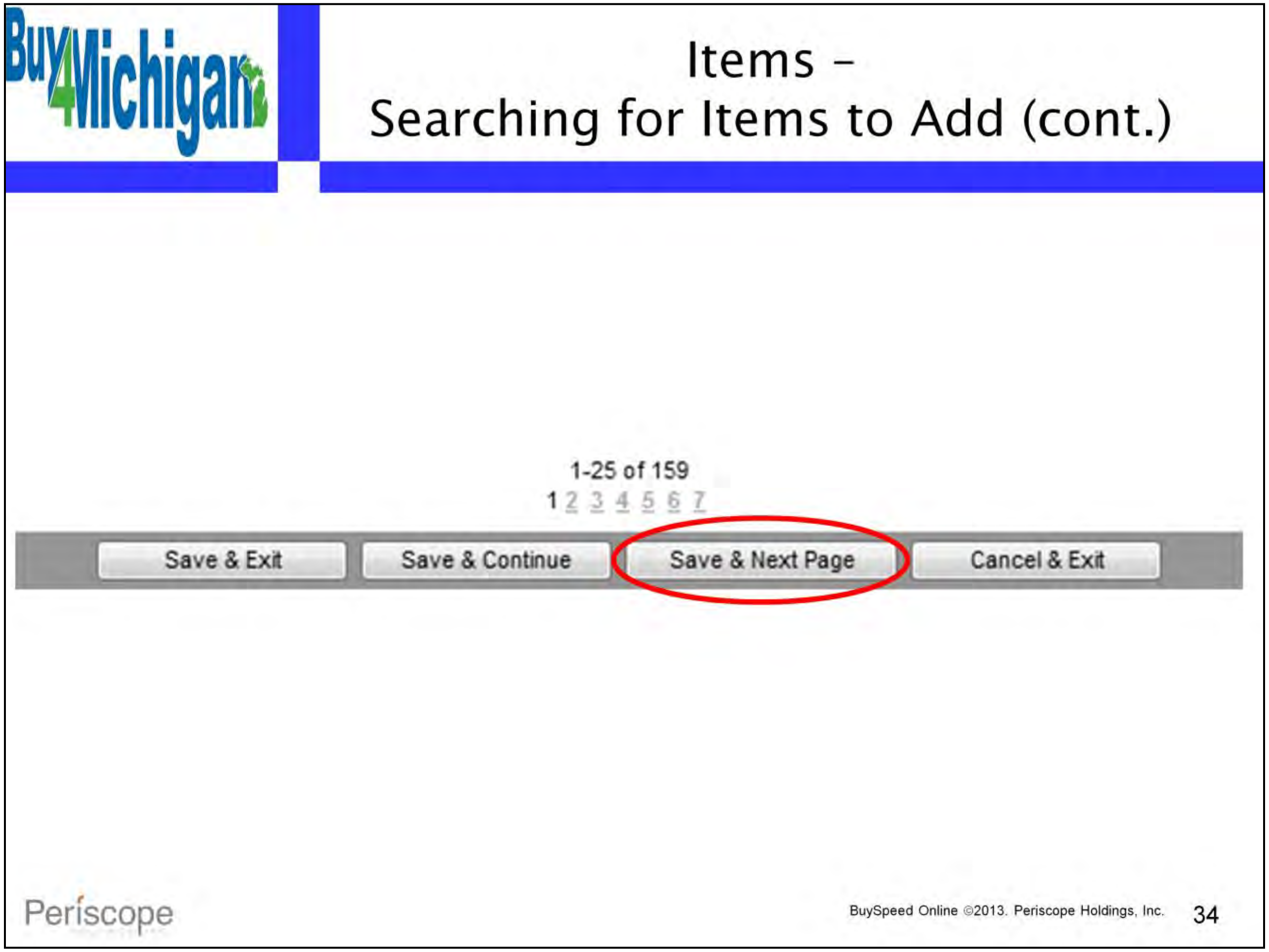
Selecting the **Search Items** button on the Items tab will display a screen that enables you to search for and add any previously defined item that has been requested or solicited before by your agency. Utilizing previously requested or solicited items saves you the time of having to define the item, but you are able to edit these items after you've added them to your Bid if desired.

Like the other search screens throughout Buy4Michigan, to conduct a search you enter your search criteria in the available **Search Fields** and click **Find It** to have the system return the matching results. Note the **Result Type** field along the bottom of screen. Selecting "Item" in this field will return a list of items that you can directly add to your Bid. Selecting "Document" in this field will display a list of Bid documents which you can select from to view and add it’s specific items.

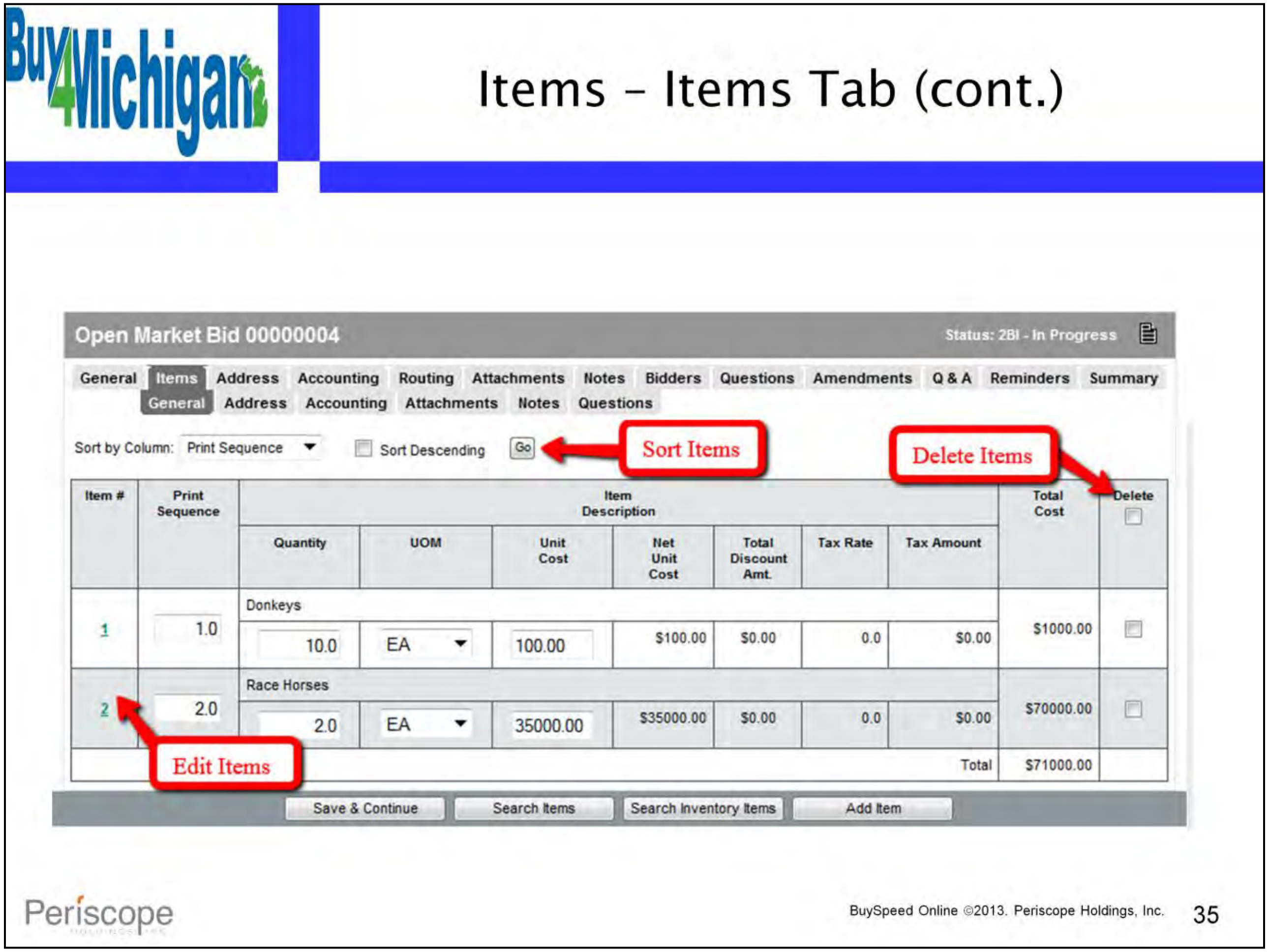


Once you've conducted your item search, your results will appear below. If your search criteria matches items on both previous Bids, a tab for each document type will appear directly below the **Results** section heading. Selecting the **Req** tab will display the Requisition results, while selecting the **Bid** tab will display the Bid results, whether your chosen **Result** Type was "Item" or "Document."

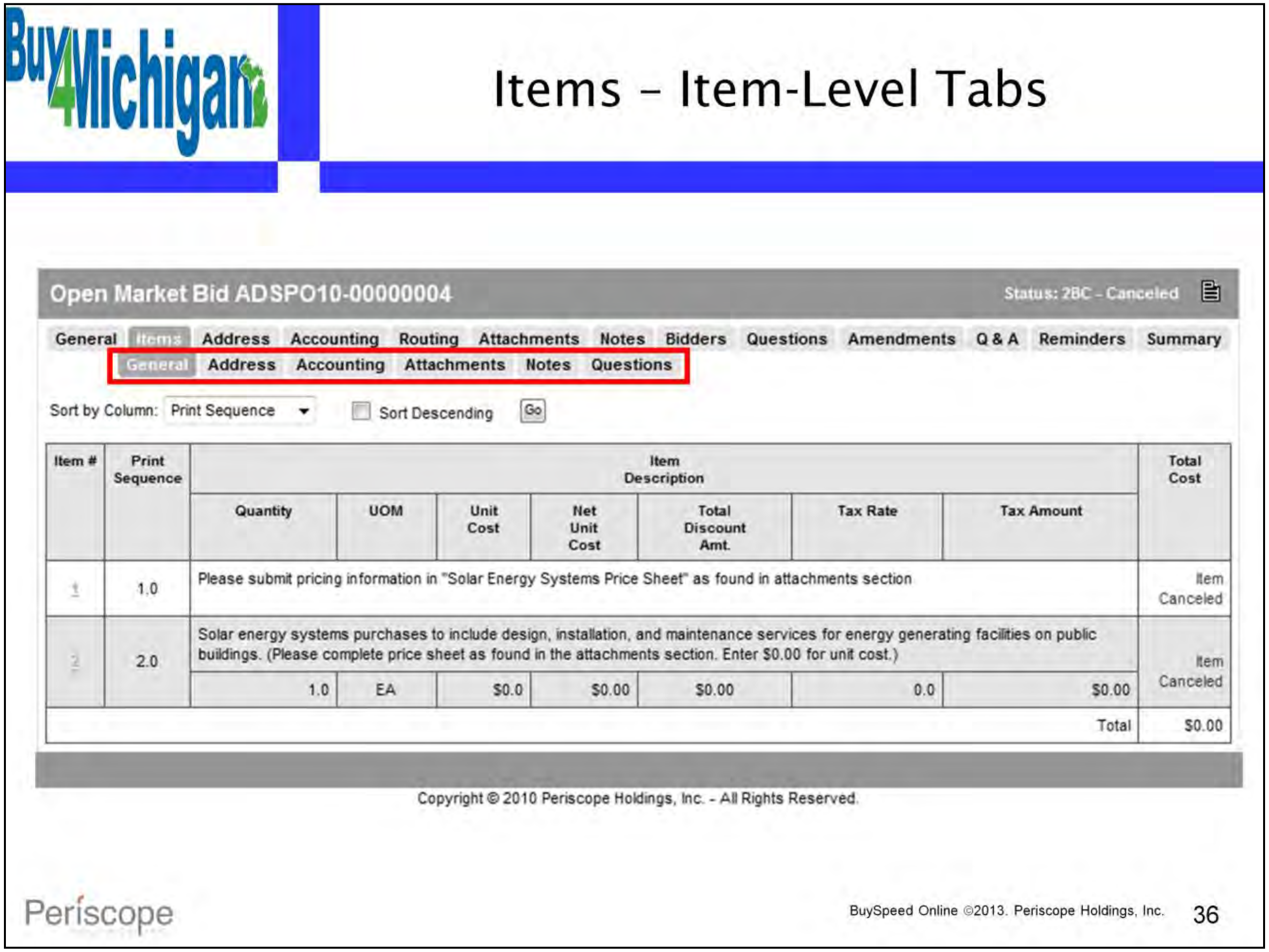
If you selected "Item" as your **Result Type**, you'll see the list of items matching your search criteria. For Normal items, you'll see a box in the **Quantity** field enabling you to type in the number of the item you'll need (this can also be edited from the Items tab). For Narrative items, you cannot select a quantity, so you'll need to check the box next to the item in the **Select** column in order to add the item to your Bid. If you selected “Document” as your **Result Type**, you’ll need to select the document you’d like to add items from before you’ll see a list of items and be able to indicate a quantity.



Once you're finished reviewing the results on a page, you can either conduct another search or select one of the button options on the bottom of the screen. If more than 25 items are listed, note that a **Save & Next Page** option appears. Clicking this option adds the items you've selected on the current screen, then displays the next 25 item results. Clicking **Save & Exit** will add your selected items and return you to the Items tab. Clicking **Cancel & Exit** will not add any of the items from the list you are currently viewing (but previously added items will remain) and will return you to the Items tab.



Upon returning to the Items tab screen, all of the items you've added will display allowing you to edit, sort and delete the items as needed. Once you're done building your items, click **Save & Continue** before proceeding to the next tab.



You may have noticed that while you are on the Items tab screen, a set of sub-tabs appears below the normal or Header-level tabs. These are referred to as Item-level tabs. They allow you to edit information on an item-by-item basis, rather than for all items.

Note that just like their corresponding Header-level tabs, the Address and Accounting tabs can be skipped when developing Bids. The other Item-level tabs are discussed in this training along with their corresponding Header-level tabs.

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Attachments

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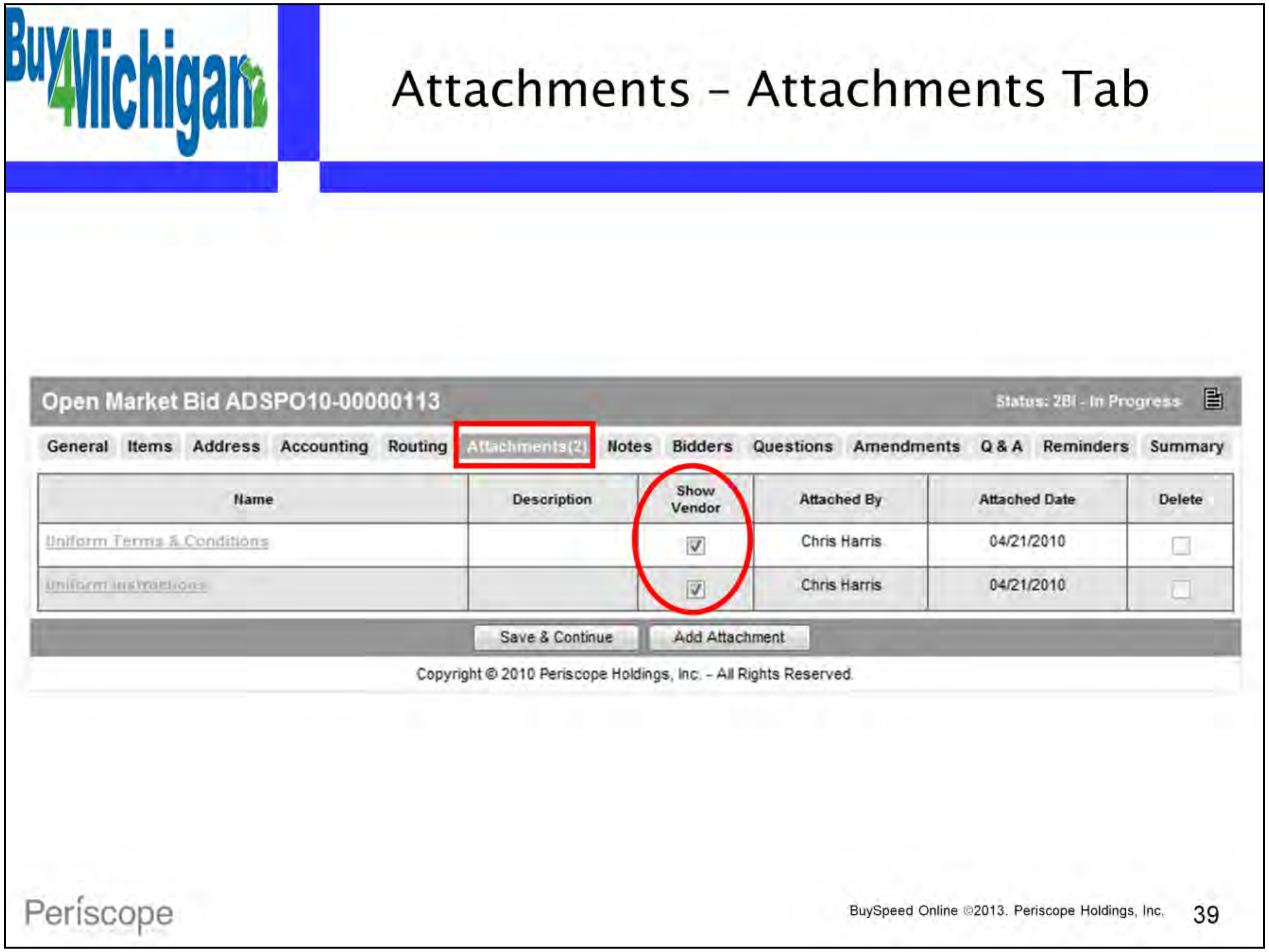
To attach a new file to your Bid, select the **Add Attachment** button on the Attachments tab. This will display the **Add File** screen. Next, click the **Browse** button, which will open a pop-up window enabling you to find the folder on your computer where the document is located. Once you've found the document you'd like to attach, you can double-click the document, or select it and then click "Open."

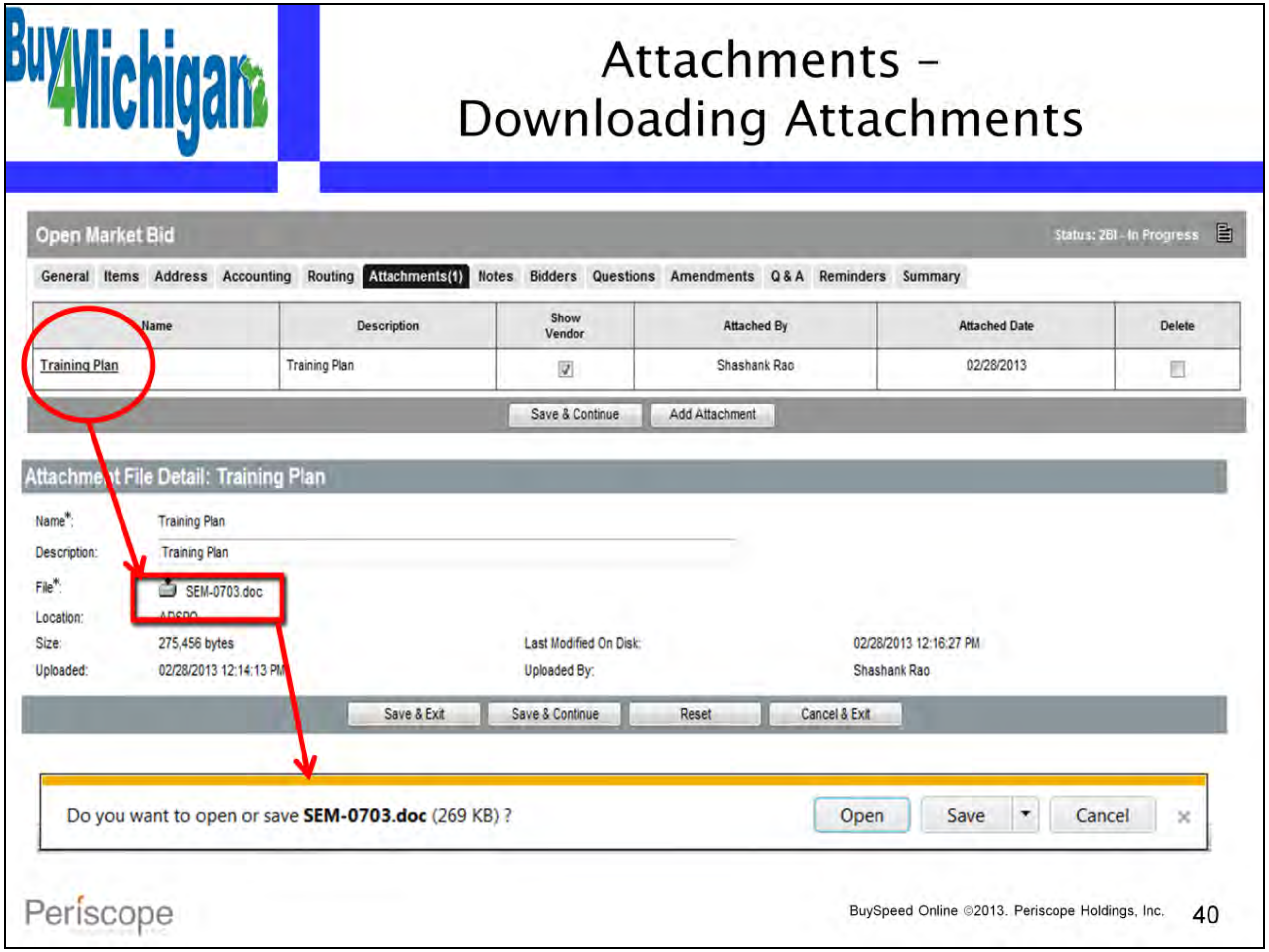
The pop-up window will now close and details about the document will display in the **Name** and **File** fields. You can edit the **Name** of the file that will appear on the Attachments tab, but do NOT attempt to edit the **File** information, as you may disable the ability to download the file. You can also provide a **Description** of the document if you choose. Once complete, click **Save**

& Exit to return to the Attachments tab. Your document is now attached to the Bid. Note that attachments will appear in the order that they are attached.



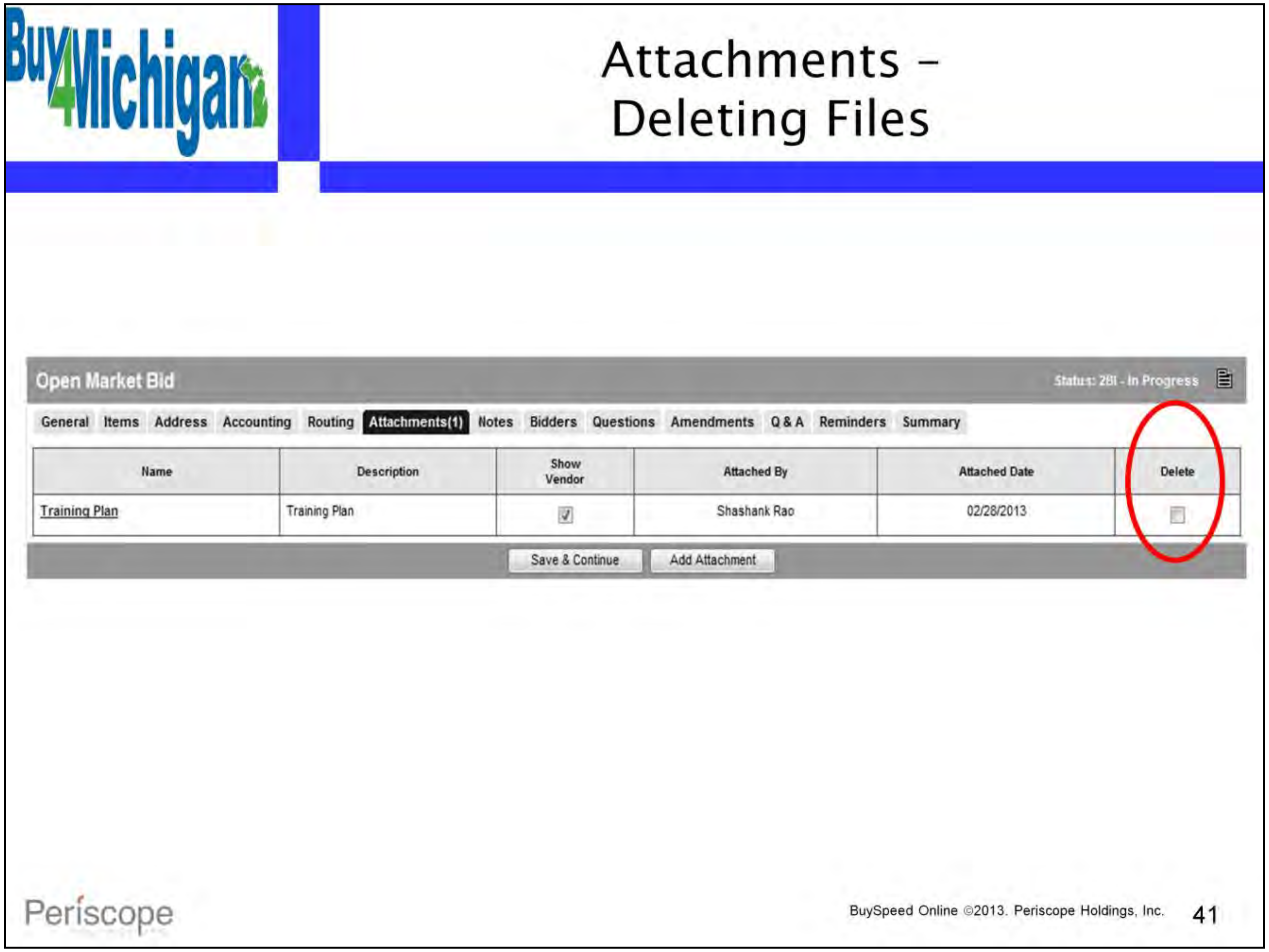
The official documentation related to your solicitation, including Terms and Conditions, Instructions, Specifications, etc. can be attached to the Bid document via the Attachments tab. You will need to complete these documents outside of Buy4Michigan and then attach them to your Bid.

From the Attachments tab, you can attach new documents, and view, download or delete any documents already attached. You can also indicate for each attachment whether it should display to vendors responding to the solicitation by selecting/de-selecting the **Show to Vendor** check box. By default, this box is checked. If you wish to use attachments for the purpose of internal communication, you will need to manually uncheck the box.



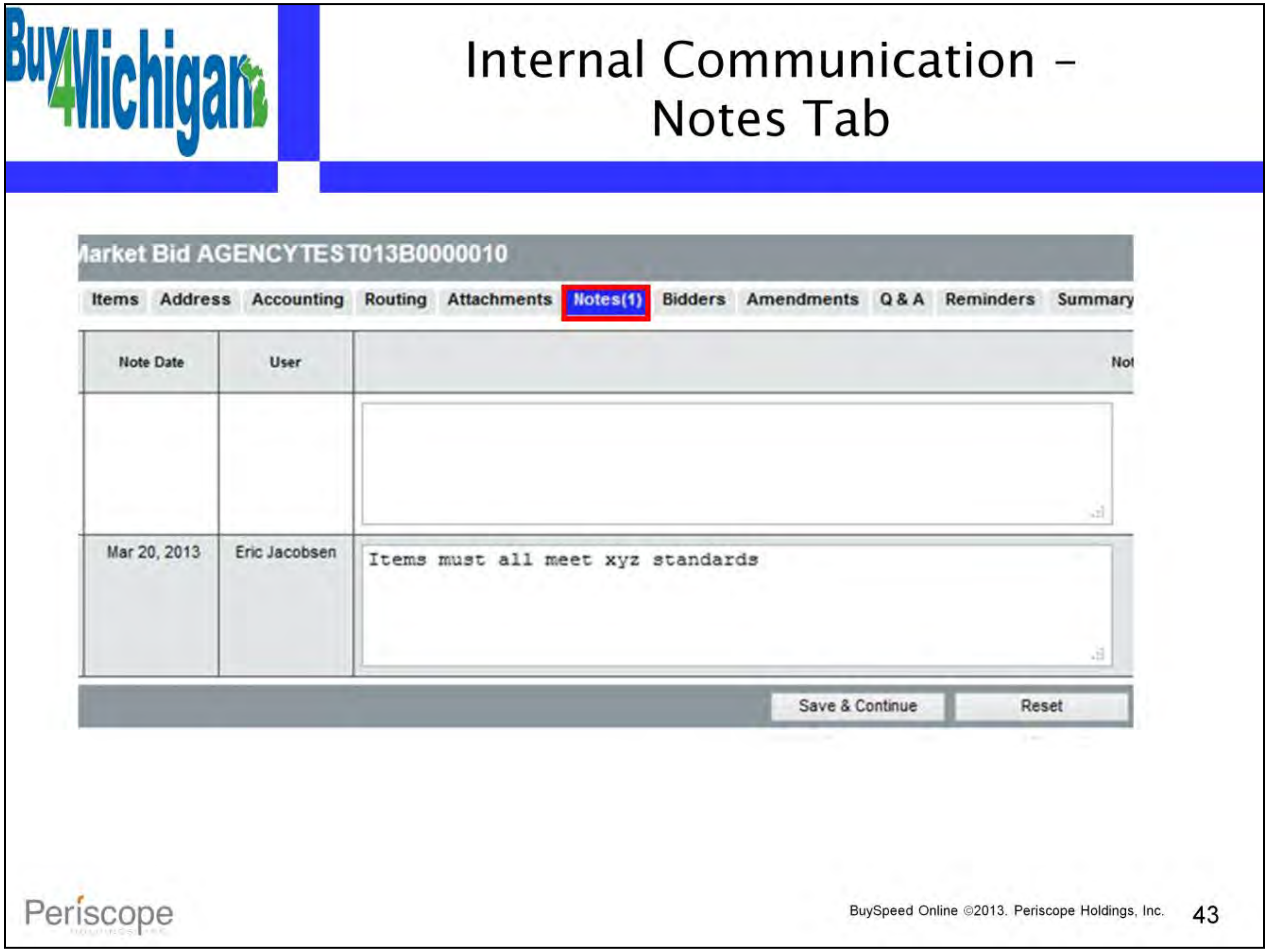
Uniform Terms and Conditions and Instructions, as well as other documentation may be automatically attached to new Bids documents by administrators from your agency. If you need to edit documents that are already attached to the Bid, you will need to download them, edit and save them outside of Buy4Michigan, attach the new document to your Bid, then delete the previous version from your Bid or enter a **Description** for the previous version indicating that it is no longer the current version.

To download files that are already attached to your Bid, click the link in the **Name** column on the Attachments tab. This will display the **Attachment File Detail** screen which provides you all the information about the attachment. Next, click the icon in the **File** field. You will then be prompted to either “Open” or “Save” the document. If you wish to make changes to the document in order to attach a new version, you will want to select “Save.” If you want to simply view the document, click “Open.”



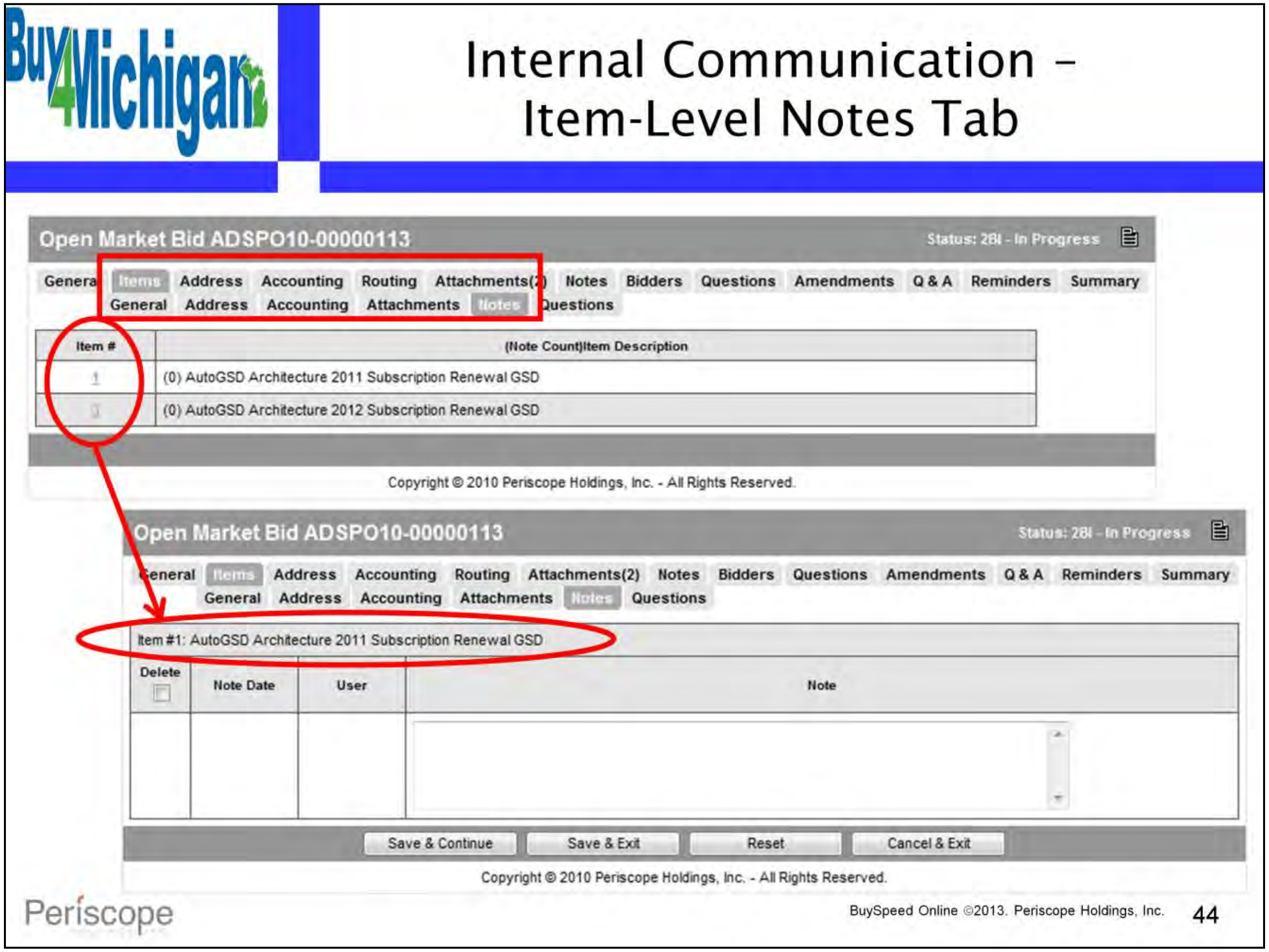
You can delete an attachment by selecting the check box in the **Delete** column next to the attachment and clicking **Save & Continue**. If an attachment has been marked by administrators as “required,” then it cannot be deleted. The check box will not allow you to select it.

Internal Communication

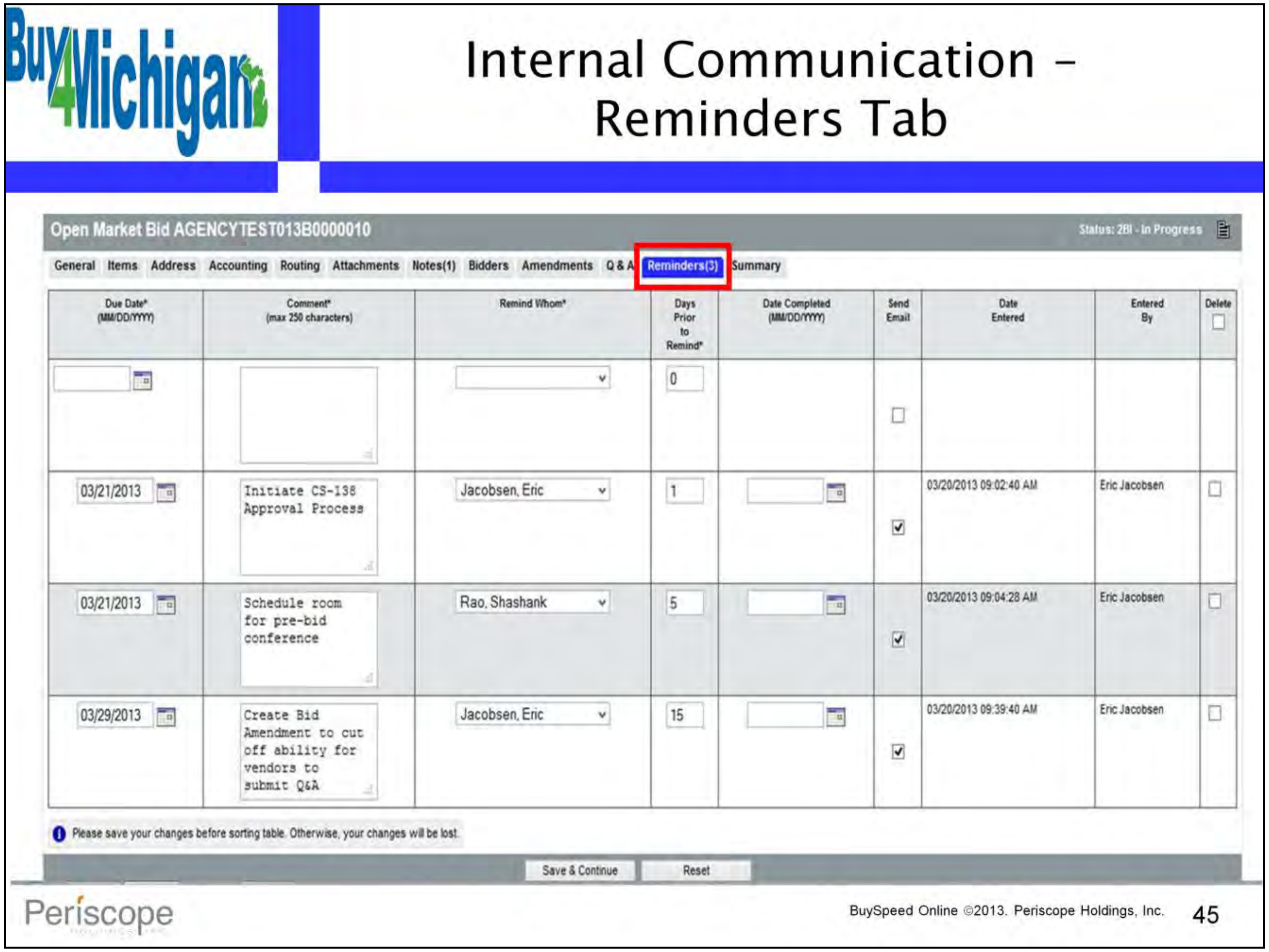


The Notes tab enables you to create notes about the document that are only visible to users from your Organization accessing the document. Notes are created by simply typing in a note in the **Note** field on the Notes tab. Once you are finished with the note, click **Save & Continue** and another text field will appear allowing you to enter in another note if desired.

Notes automatically record the date they were entered and user that entered them. After you have added a note, you can delete it by clicking the check box in the **Delete** column on the far left and selecting **Save & Continue**.



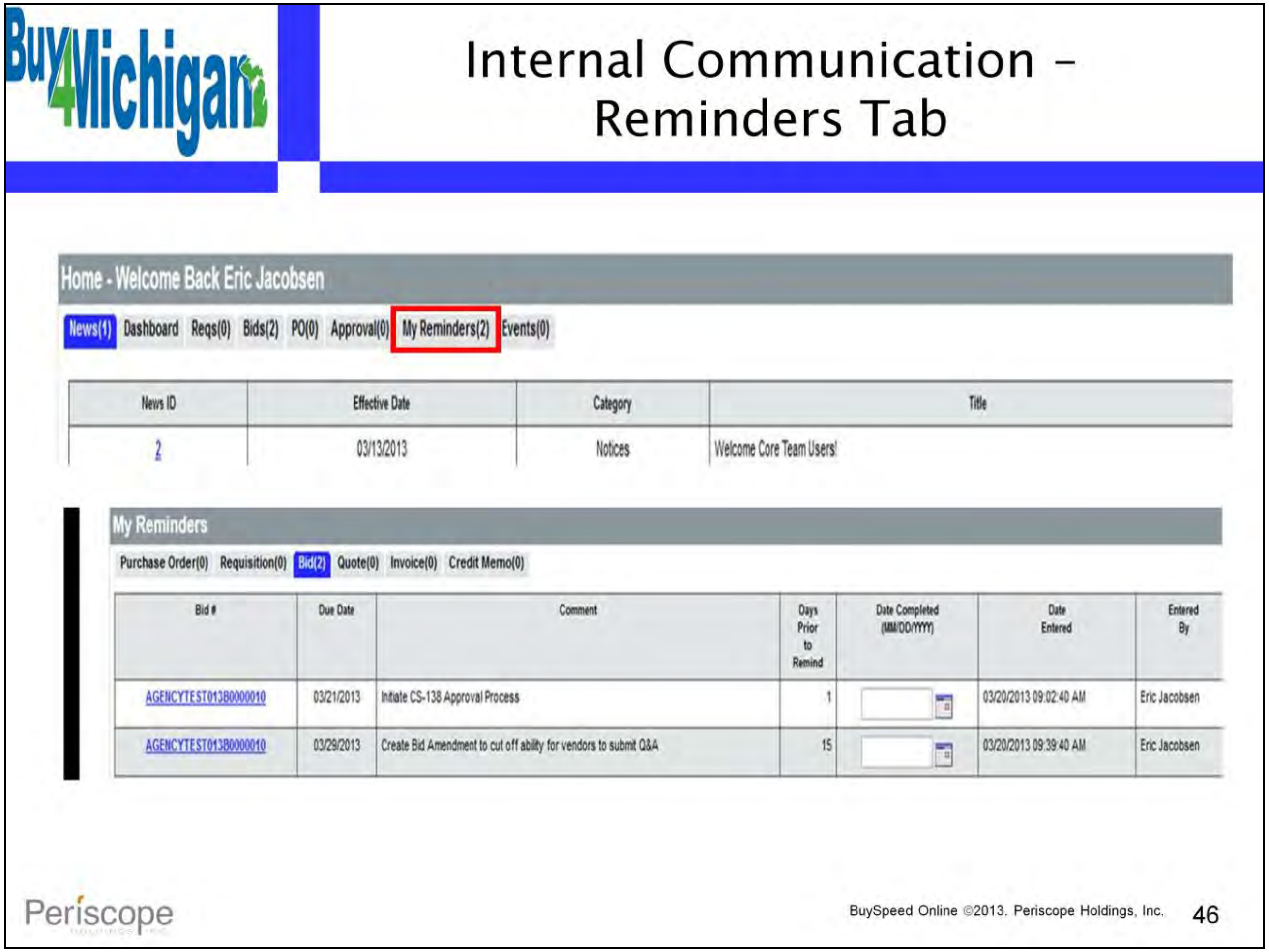
The Item-level Notes tab enables you to create notes about the a specific item that are only visible to users from your Organization accessing the document. First, select the item you wish to create the note about by clicking the link in the **Item #** field next to the item. You can then create the item-level note by typing the note in the **Note** field. Once you are finished with the note, click **Save & Continue** to add another note for this item, or **Save & Exit** to return to the list of items on the Item-level Notes tab.



The Reminders tab enables you to setup alerts related to the document for yourself or other users from your Organization. Once a reminder takes effect, it appears on the **My Reminders** tab on the Homepage of the user you set the reminder up to alert. To setup a reminder, complete the following fields:

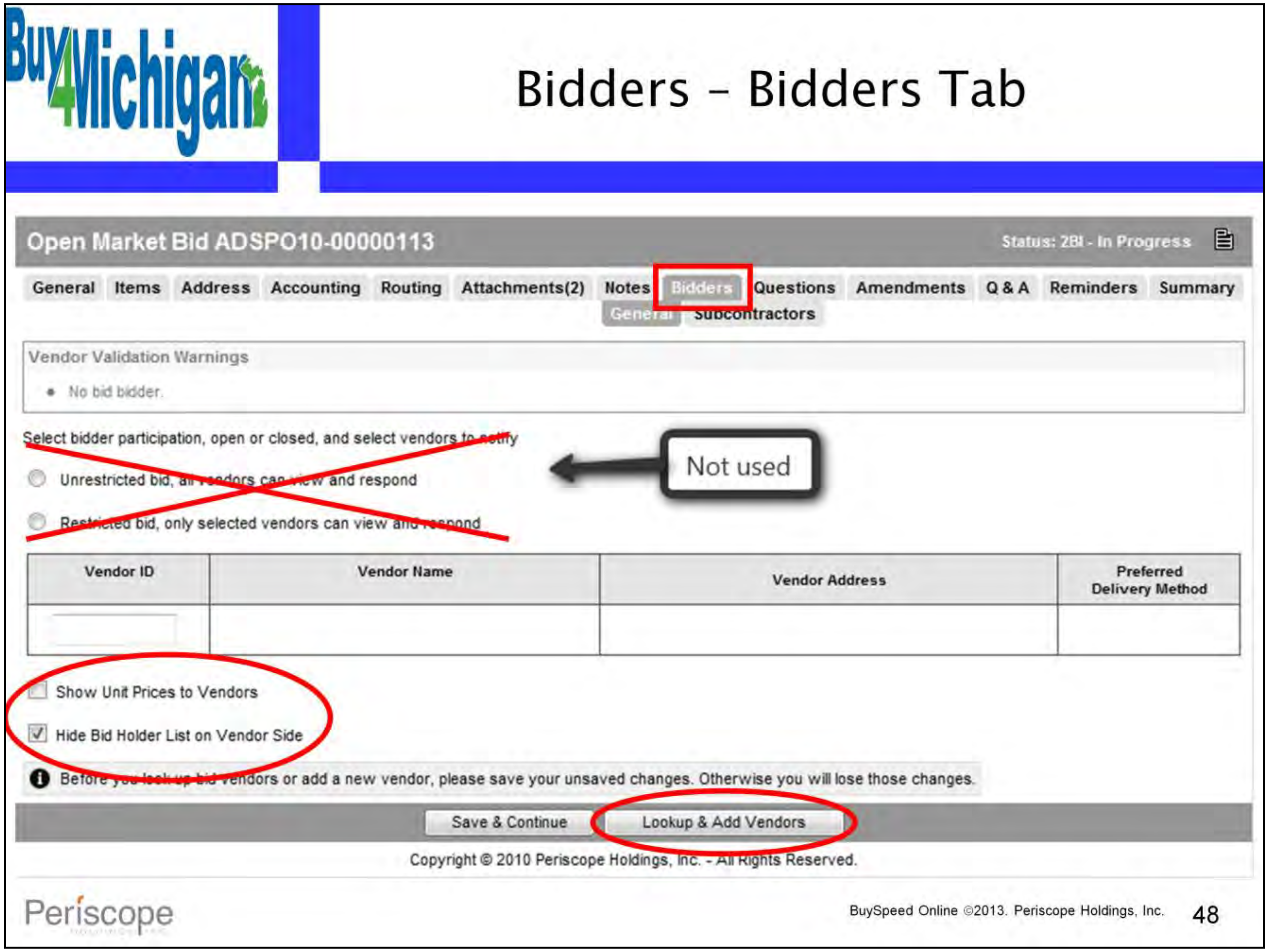
- **Due Date** is the day by which the activity you are setting up the reminder about should be completed
- **Comment** allows you to define the activity that needs to be completed
- **Remind Whom** allows you to select one user that should be reminded about the activity. You must duplicate the reminder to alert additional users.
- **Days Prior to Remind** is the number of days prior to the **Due Date** that the reminder should appear to the user you chose to remind.
- **Send Email**, when checked, will send the user you chose to remind an email at the same time the reminder appears on their Homepage. The **Comment** field will be the body of the email.

Once complete, click **Save & Continue**. This will display another blank row allowing you to setup another reminder if desired.



When a Reminder is created for a user, they will receive a notification of this reminder by personal e-mail, but the reminder will also appear on their Home screen under the **My Reminders** tab. In the image above, this user has 2 reminders. Once this tab is selected, the reminders are broken down by category. Above, we can see that the both the reminders here pertain to Bids.

Bidders

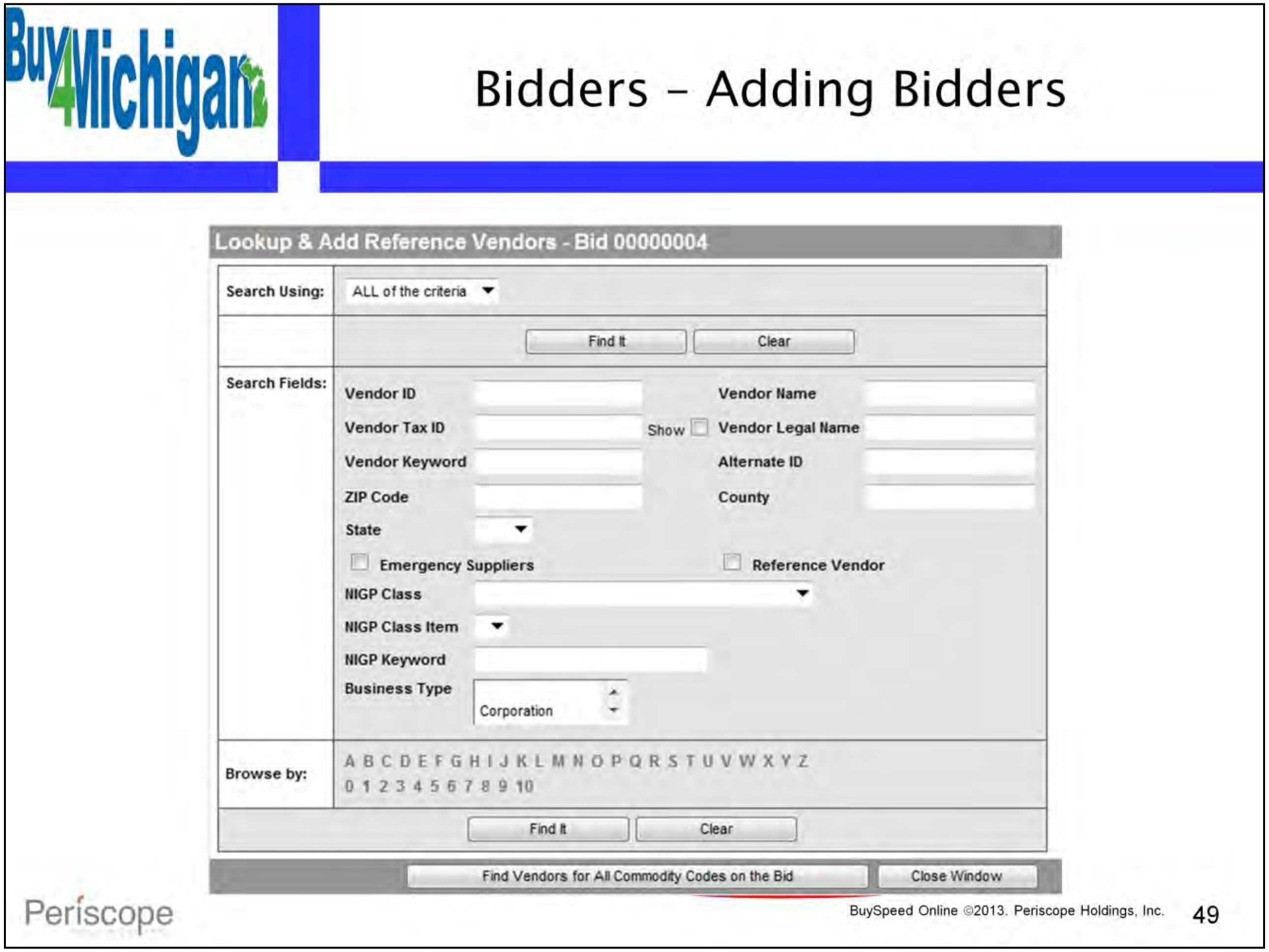


The Bidders tab is where you can select the vendors that will be notified about this solicitation. You can also set some vendor viewing privileges related to the Bid on this tab. *Note the options which are not used*. Selecting either of these options will have no effect on your Bid. <u>These settings are now controlled by the **Bid Type** field on the General tab</u>. The vendor viewing configuration options on this screen include:

• The **Show Unit Prices to Vendors** field, which when checked displays any price estimates entered on the Items tab to vendors. This option is unchecked by default so that vendors are not given an idea of how much you are expecting to spend per item.

• The **Hide Bid Holder List on Vendor Side** field, which when checked will not allow vendors to see the other vendors that may respond to the solicitation. This option is checked by default so that vendors do not know who their potential competitors are.

If you make changes to either of those fields, click **Save & Continue**. Once you are ready to add vendors that will be notified, click **Lookup & Add Vendors** on the bottom of the screen.



Selecting **Lookup & Add Vendors** will display a pop-up window that enables you to search for vendors by a variety of criteria, including vendor name, tax ID, NIGP commodity code, and Business Type. You can either enter your criteria and select **Find It** to have the matching results return, or you can simply click the **Find Vendors for All Commodity Codes on the Bid** button along the bottom of the screen to return all vendors that have registered with the commodity codes associated with the items on your Bid.

Note that Buy4Michigan does not track the search criteria that you use to develop your Bidders list. If this information is needed for historical reference, please document this using the Notes tab.

Bidders – Adding Bidders (cont.)

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
☐	000004191	The Wilkins Group LLC				8828 S. Hardy Drive Suite 105	Tempe	AZ	Tawnya Combe	(602) 909-7127	No
☐	000000525	W.T. Cox Subscriptions				201 Village Rd.	Shallotte	NC	Amanda Danford	(800) 571-9554	No

Save & Exit | Save & Continue | Find Vendors for All Commodity Codes on the Bid | Close Window

1-25 of 168
1 2 3 4 5 6 7

Save & Exit | Save & Continue | Save & Next Page | Find Vendors for All Commodity Codes on the Bid | Close Window

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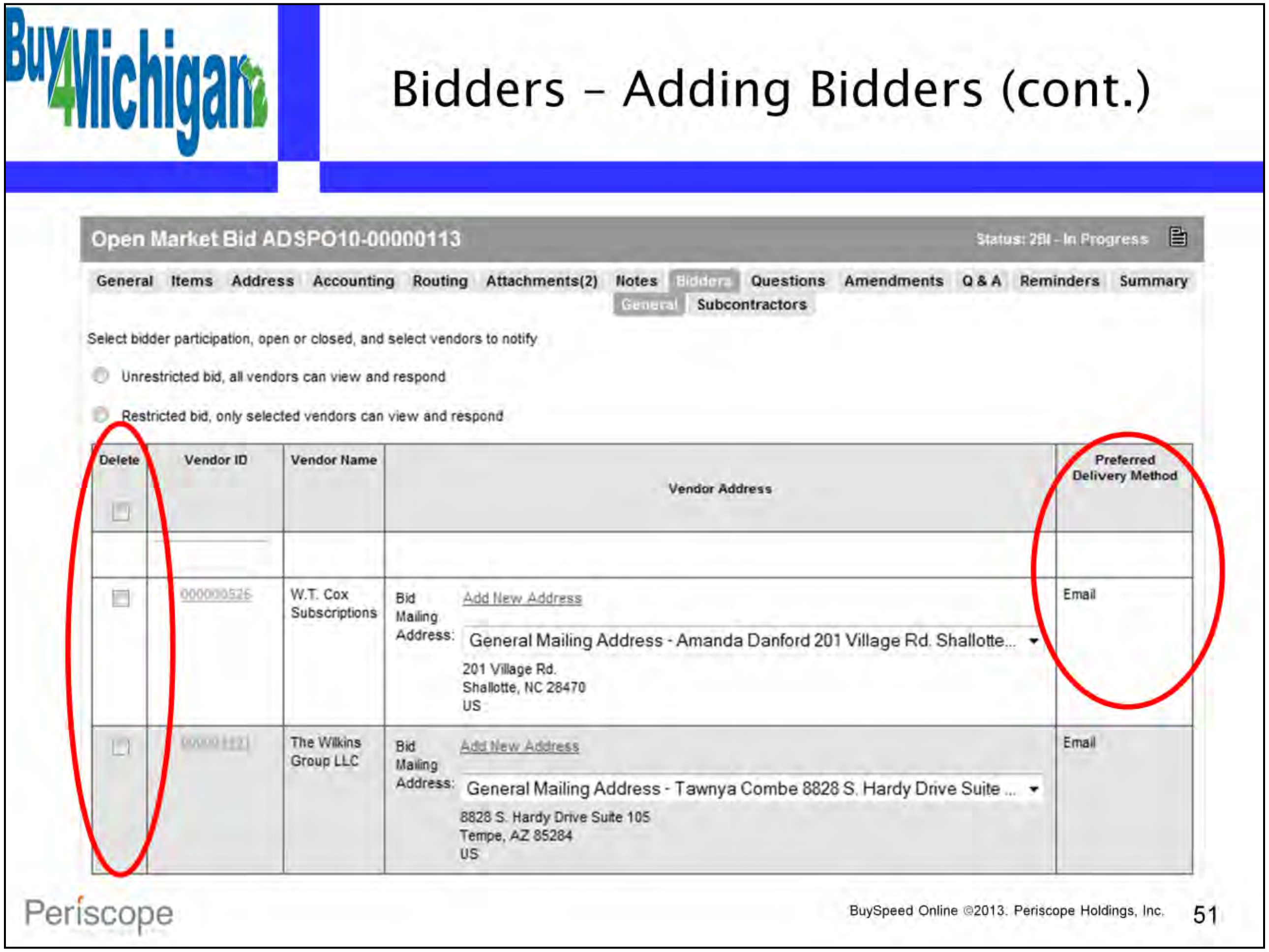
Your vendor search results will appear below the search area. To select a vendor to add to your Bidders list, select the check box next to the vendor in the **Select** column. To select all of the vendors on that screen, select the check box in top row in the **Select** column. Once you've made your selections, click one of the **Save** options below.

If more than 25 vendors were returned as a result of your search, they will appear on different screens. Directly above and below the results list, the total number of results is displayed along with links to each page of results. You can only add vendors to your Bidders list that appear on the screen you are currently viewing, so if you need to add vendors across pages of results, you will need to select the **Save & Next Page** button that appears on the bottom of the screen. This will add your vendor selections on the current screen to the Bidders list, and then take you to the next page of vendors so you can add them as well.

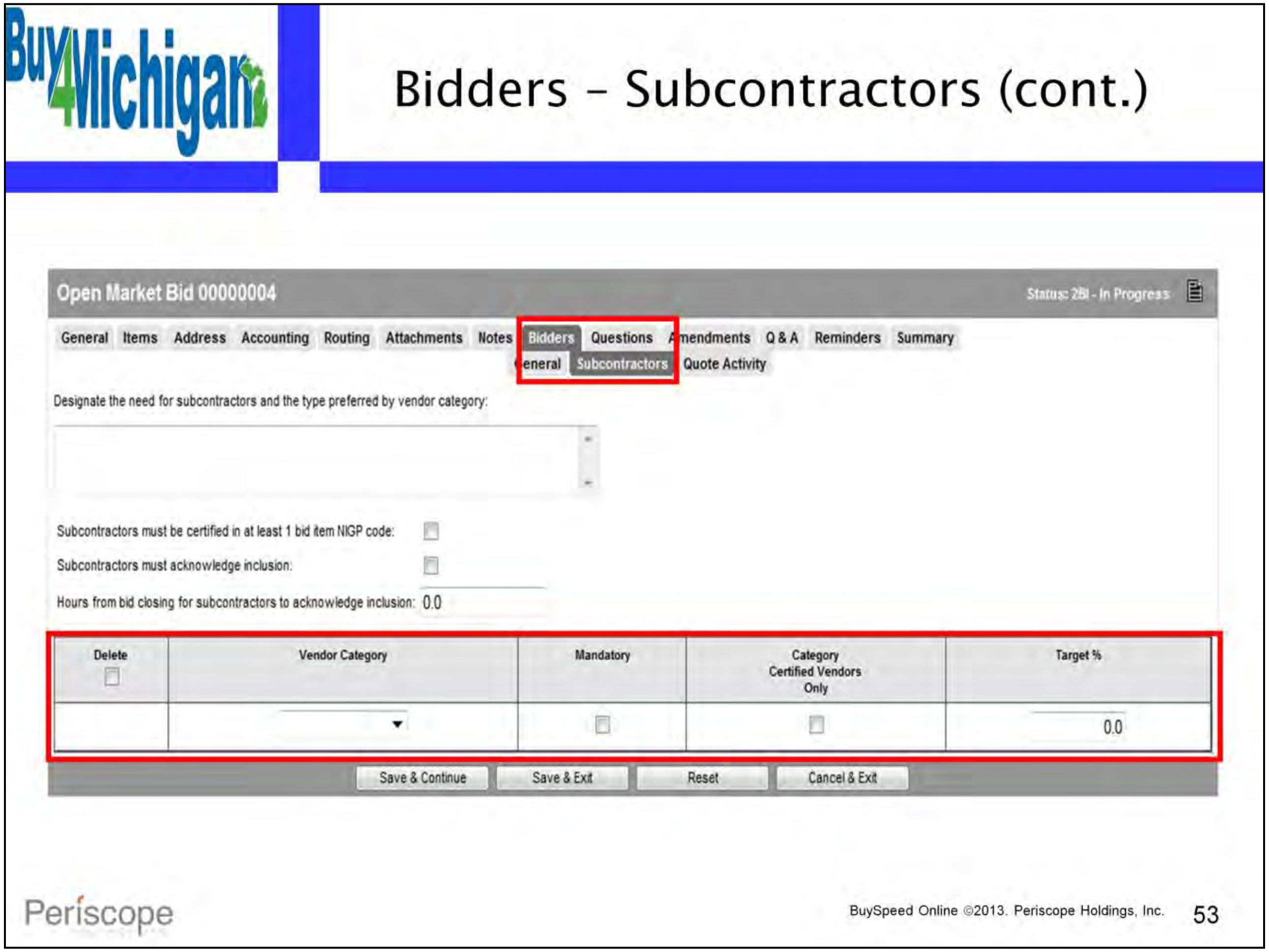


After selecting one of the **Exit** options from the vendor search screen, the pop-up window will close and the Bidders tab of your Bid will update to display a list of the vendors you added. You can view the profile of any added vendor by clicking the link in the **Vendor ID** column. Note that you can delete any vendor you've added by clicking the check box in the **Delete** column next to the vendor and selecting **Save & Continue** on the bottom of the screen.

You can also conduct another search to add additional vendors to your bidders list by selecting **Lookup & Add Vendors** again on the bottom of the screen. Note that Buy4Michigan does not support the ability to notify newspapers regarding a solicitation, therefore seek the guidance of your agency's Chief Procurement Officer in order to determine how to go about this process.

If you expect that subcontractors may be utilized by offerors, or you require specific subcontractor participation to award the solicitation to a vendor, you can set rules regarding subcontractor participation via the Subcontractor sub-tab within the Bidders tab. The text box on the top of this tab allows you to type in any requirements regarding the use of subcontractors. This information should also be included in the formal documentation attached to the Bid.

Other options on this tab allow you to mandate that the vendors identified by the offeror as subcontractors are registered with at least one of the commodity codes selected for the items on your Bid, that those subcontractors must login to Buy4Michigan to acknowledge their inclusion in the response, and that they must acknowledge that inclusion a certain time period prior to the closing of the solicitation’s response period. Note that offerors will only be able to select vendors as subcontractors that are registered within Buy4Michigan.



The final section allows you to recommend or mandate specific types of vendors be included as subcontractors by selecting **Vendor Categories** that vendors are asked to associate with upon registering with Buy4Michigan. However, since the options setup by the State within these categories allow vendors to select a “not applicable” option, selecting a **Vendor Category** here will not ensure that a subcontractor belongs in a specific category (e.g. minority-owned, small, or women-owned business). In fact, all vendors are required to provide an answer in all options when registering, so selecting a **Vendor Category** will not restrict any vendor from being chosen as a potential subcontractor by an offeror.

However, Buy4Michigan requires at least one Vendor Category be designated here in order to enable vendors to select their intended subcontractors on their Quote response, **so if you want responses to contain offeror’s intended subcontractors, then you must select at least one.** Furthermore, since the State does not certify vendor’s selection within these **Vendor Categories**, do NOT select the **Category Certified Vendors Only** check box. This will have the effect of excluding all vendors from being selected as subcontractors.

The **Target %** option allows you to recommend that subcontractors receive a certain percentage of the total dollar amount of the offeror's quoted price. Checking the **Mandatory** option will make it required that vendors receive this percentage.

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Questions

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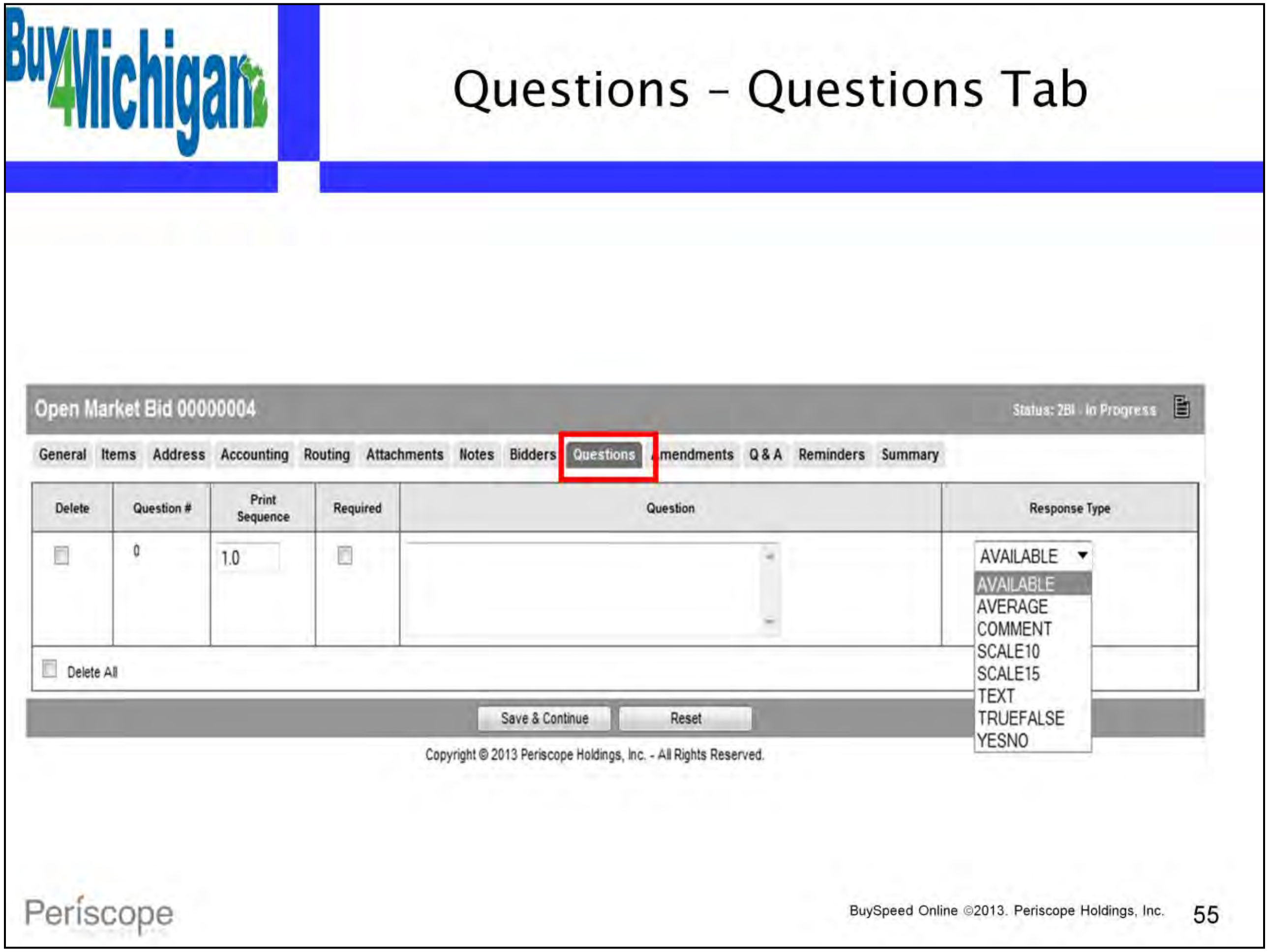

The Questions tab enables you to pose questions to vendors that they are asked to respond to within their Quote. You are able to configure the type of response they are allowed to provide, as well as whether an answer to each Question is required before they can submit their Quote. To add a Question, go to the Questions tab and type your question into the **Question** field. If you wish to make answering the Question a requirement for vendors before they can submit their Quote, select the check box in the **Required** column next to the Question.

Lastly, you will need to select what type of response vendors are allowed to provide to the questions by choosing an option in the dropdown box in the **Response Type** column. Once you are have added a Question, select **Save & Continue** and another row will appear enabling you to input another Question.

Note that the these questions and vendors' responses do not become part of the resulting contract(s), therefore it is advised that questions related to the functions of fulfilling the contract be asked in attached documents, rather than via the Questions tab. The Questions tab is better suited for questions regarding vendor's capacity, experience, and qualifications, which can be compared when evaluating the responses. Any questions asked via the Questions tab should also be referred to within the

Special Instructions attached to this Bid.

Questions – Response Types

Response Type	Description
AVAILABLE	Vendor can select one of the following: Fully provided, Not Provided, Custom Development Required, Provided With Modifications, Provided with Reporting or Development Tool
AVERAGE	Vendor can select one of the following: Poor, Below Average, Average, Above Average, Excellent
COMMENT	Vendor can provide text response of up to 250 characters.
SCALE10	Vendor can select a number from 1 to 10.
SCALE15	Vendor can select a number from 1 to 5.
TEXT	Vendor can provide text response of up to 4000 characters.
TRUEFALSE	Vendor can select either true or false.
YESNO	Vendor can select either yes or no.

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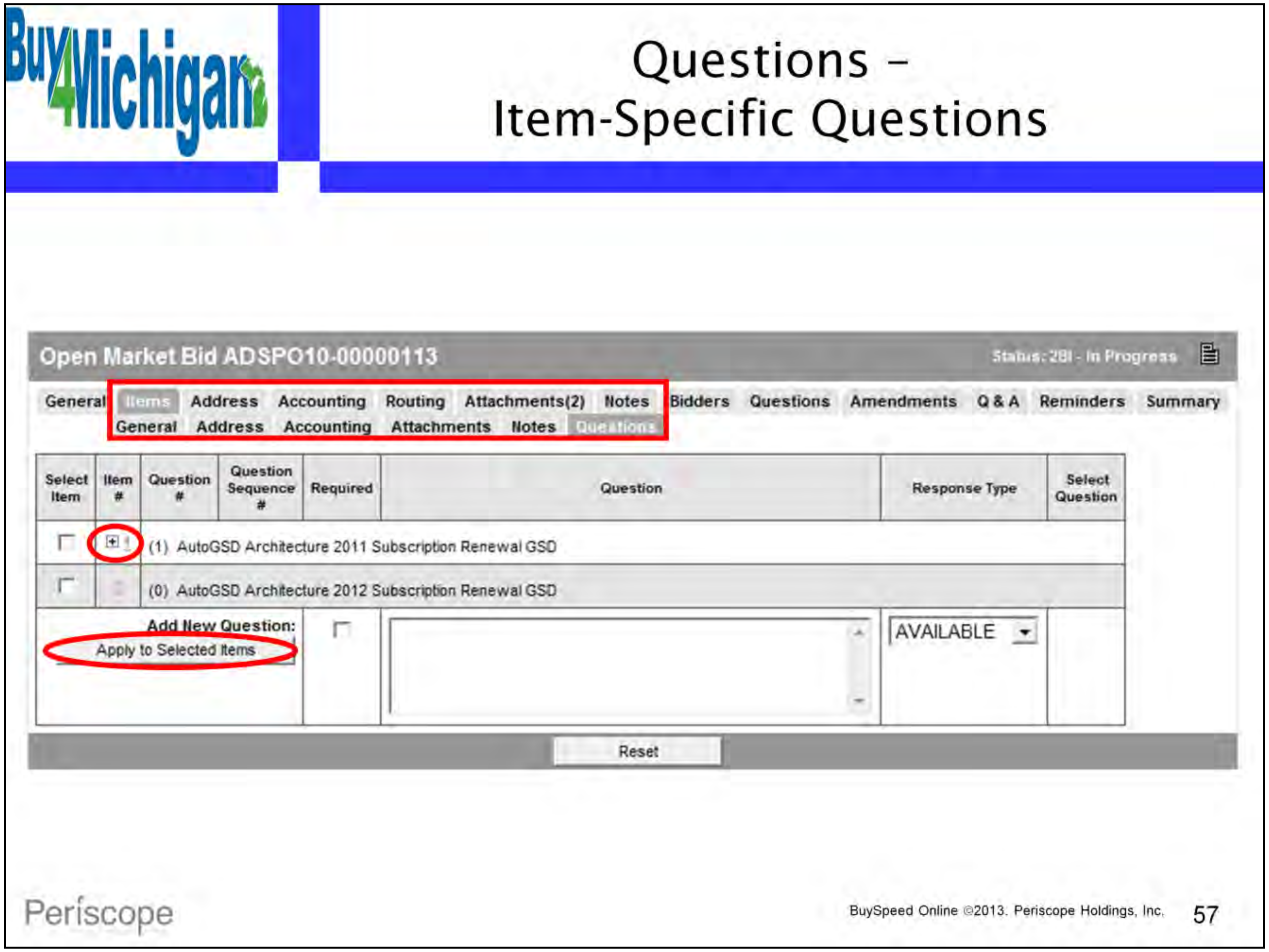
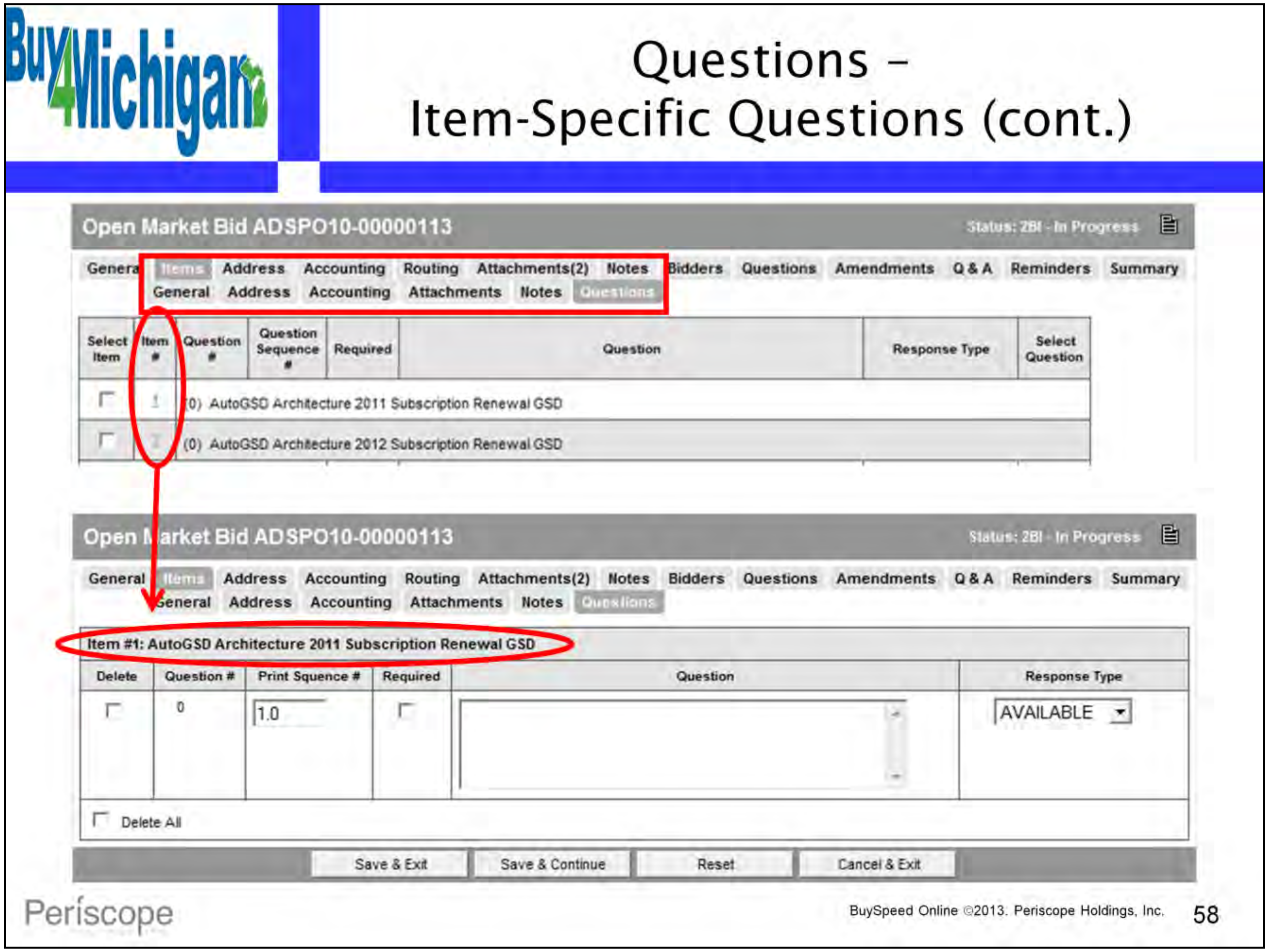
The table defines the available **Response Type** options when setting up Questions on your Bid.

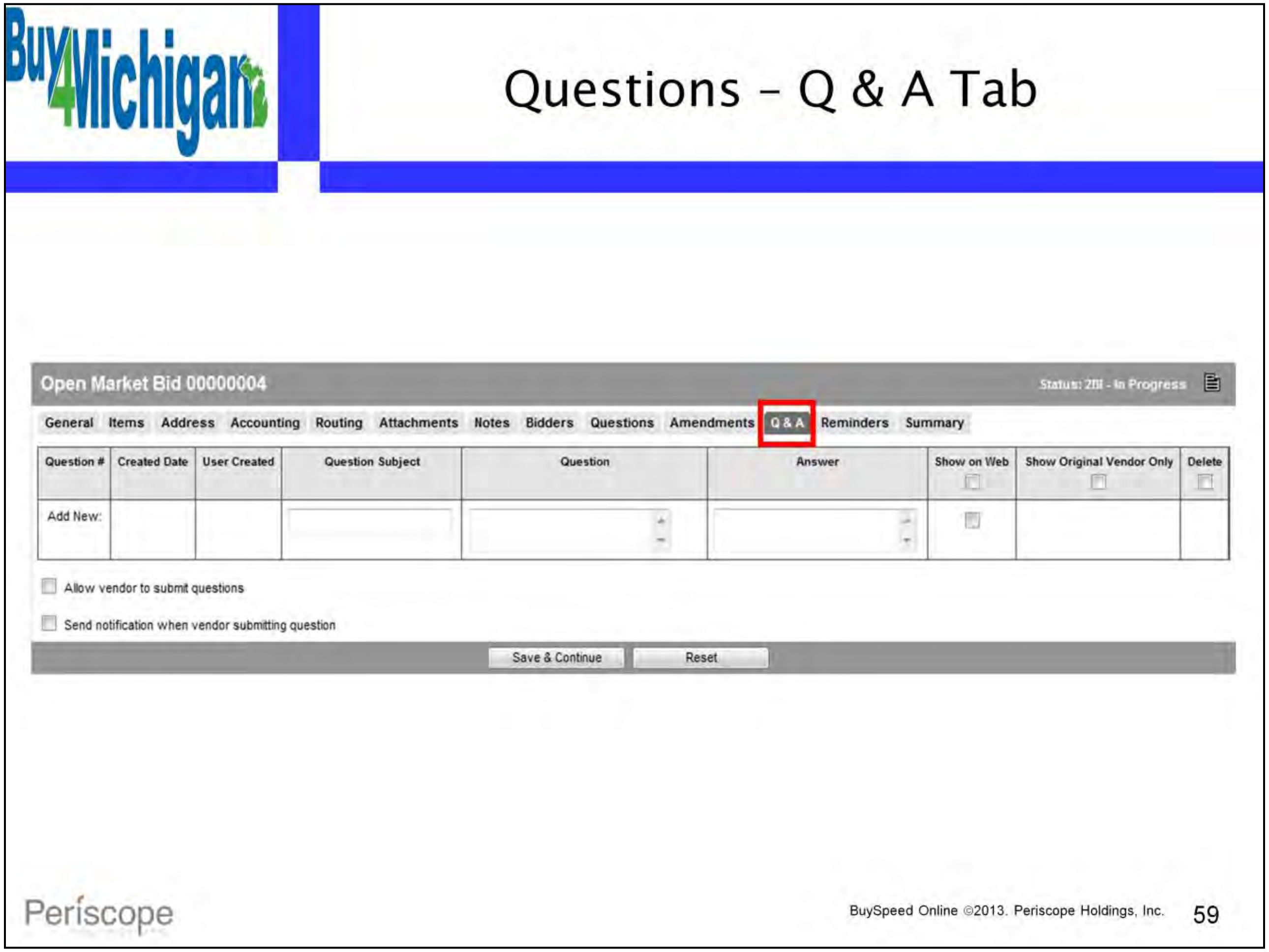


You can also setup Questions for vendors that pertain only to a specific item or items via the Item-level Questions tab. Upon selecting that tab, a list of the Normal items on the Bid will display above the field in the **Question** column. To apply your Question: Type in your question, select the required **Response Type,** check the box(es) in the **Select Item** column on the far left next to the item(s) you would like to apply the Question to, and click the **Apply to Selected Items** button.

This will refresh the screen, clearing your Question from the text field, and adding an **Expand (+)** icon next to the links in the **Item #** column for the items to which you applied the Question. You can now enter another question and apply it to items. Clicking the **Expand (+)** icon next to an item # will display the Question(s) you've applied to that item directly below the item's description.



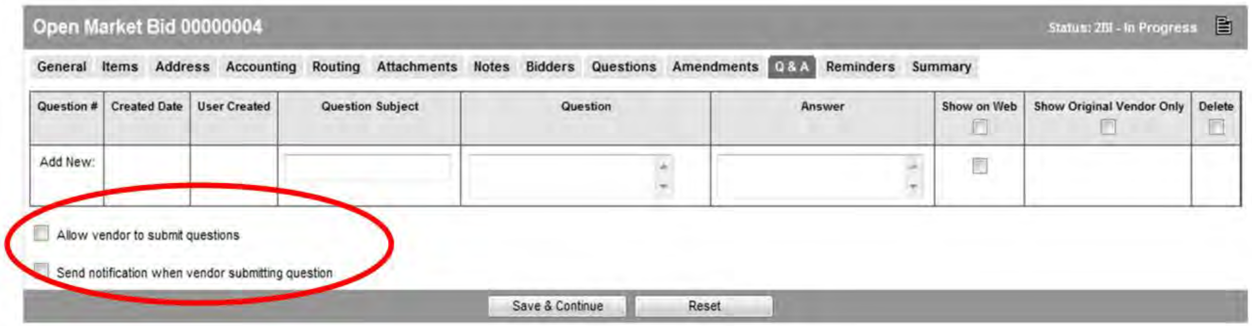
In order to view, edit, add and delete questions for one specific item, click on the link in the **Item #** column next to that item on the Item-level Questions tab. The tab will now display a screen that mimics the Header-level Questions tab, except that the Questions will apply to only the item you have selected.



Following the publishing of your Bid, you may get questions from vendors regarding the solicitation. Buy4Michigan enables you to document these questions and provide answers via the Q & A tab on the Bid. Vendors and the public can then access this Q & A by viewing the Bid document.

Prior to publishing your solicitation, you can select options to enable vendors to submit their questions through Buy4Michigan once the solicitation is published. These questions will appear on the Q & A tab and allow you to respond through Buy4Michigan.

Questions – Q & A Setup



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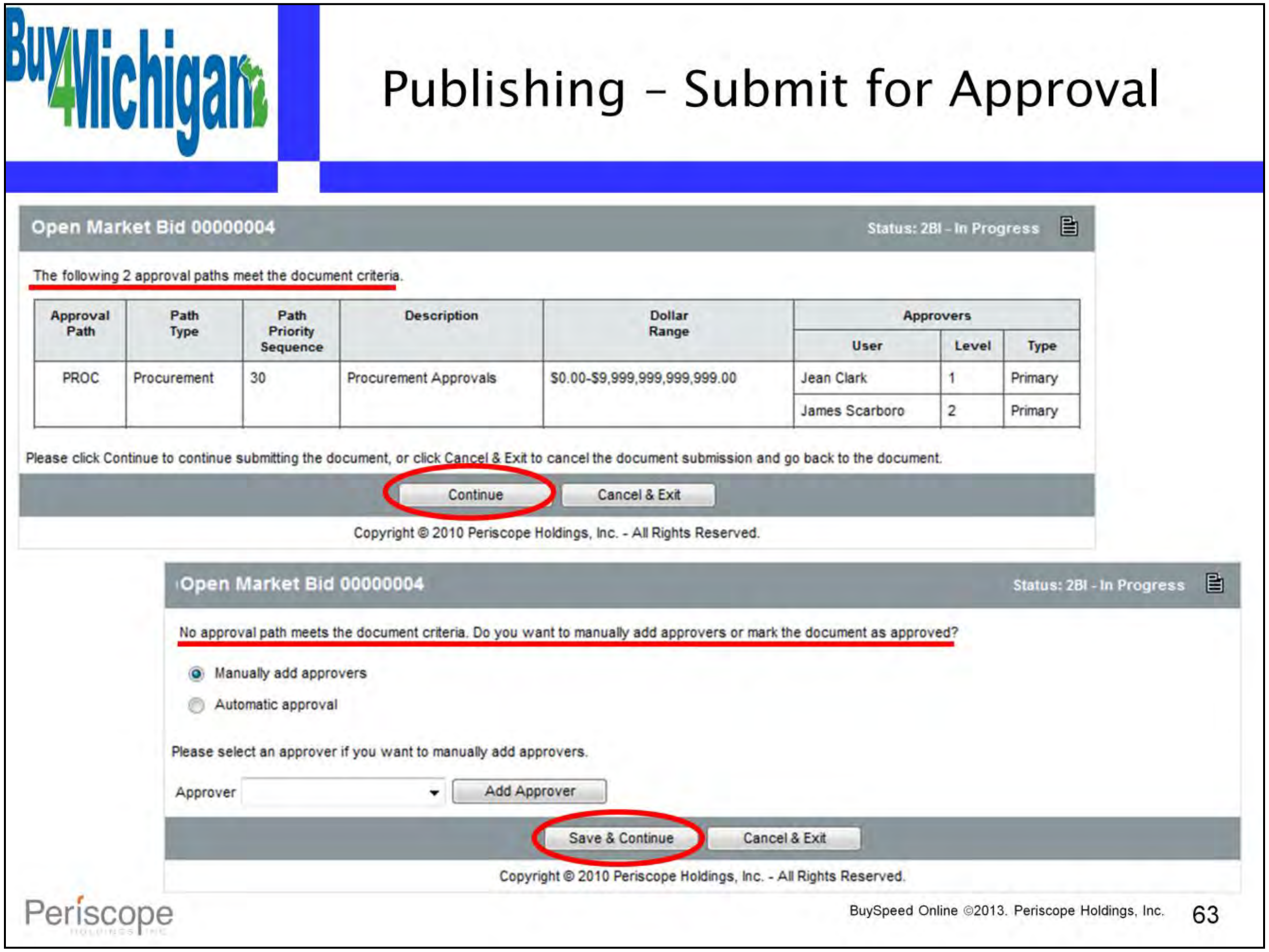
Clicking the check box **Allow vendor to submit questions** will allow vendors accessing the Bid following publication to submit questions to you electronically. These questions will automatically appear on the Q & A tab and allow you to complete the **Answer** column for them.

If you'd like to receive an email notification when vendors submit questions through Buy4Michigan, select the check box below, **Send notification when vendor submitting question**. If vendors can submit questions through Buy4Michigan, but you choose not to be notified, then you will have to return to the Q & A tab in order to view submitted questions.

Publication

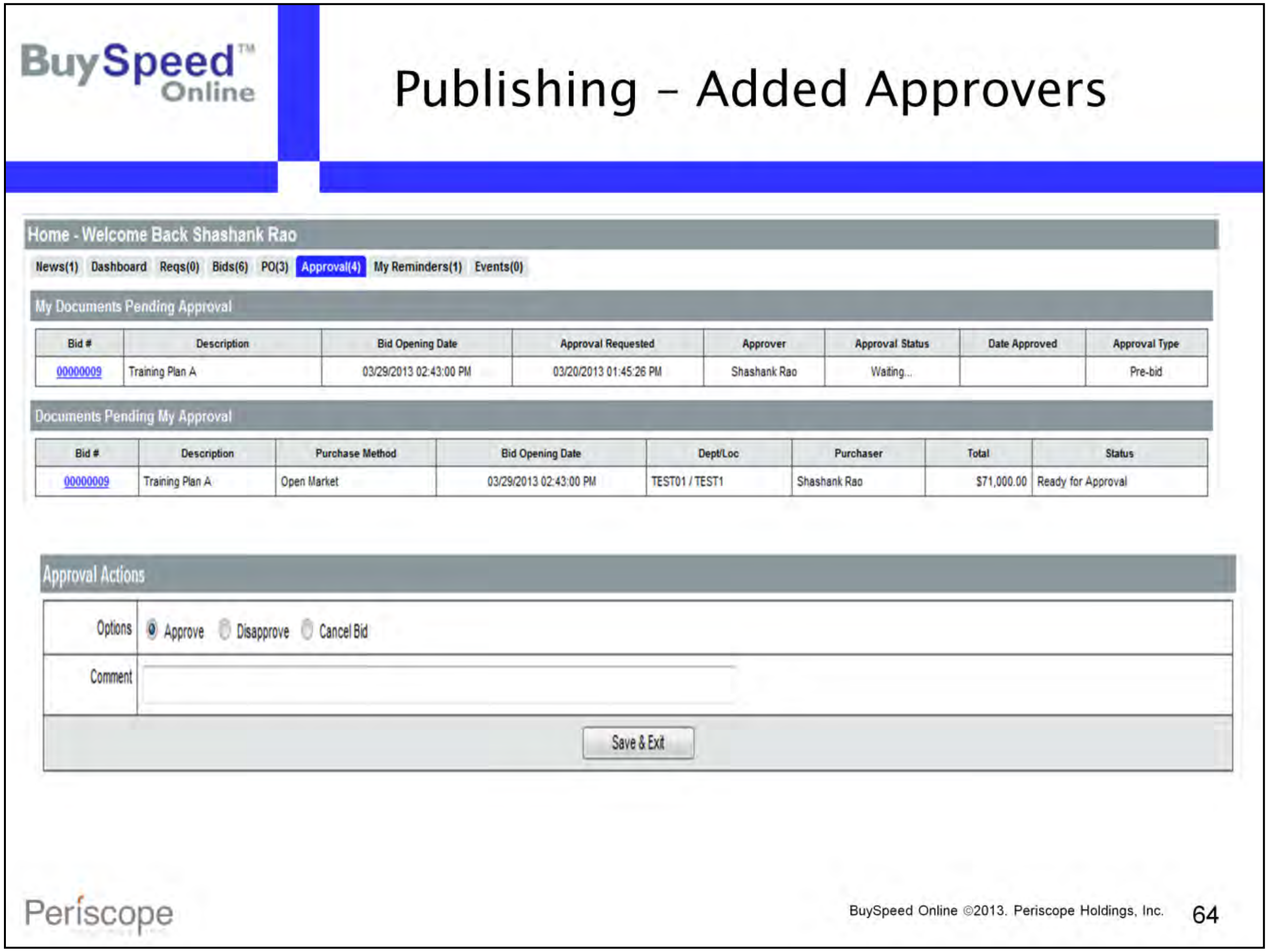
Once you have completed each of the necessary tabs, you can review all of the information you've entered on the Summary tab. If there are any issues with the information you've provided, validation warnings and/or errors will display along the top of the Summary tab. Yellow warnings do not require action on your part, but red errors require that you fix the issue before you are allowed to submit the Bid for approval.

Once you have corrected any issues and are ready to publish the solicitation, you can submit your Bid document for approval by clicking the **Submit for Approval** button on the bottom of the tab. Note that you can also print a paper copy of the Bid document by clicking the **Print** button. This will display a pop-up window with the printed version of the information you've input on your Bid. To the State, this printed document represents the cover page to the entire solicitation, the rest of which should be present in the documents you've attached to the Bid. If asked to produce all solicitation documentation, this printed document should appear on top of the documents attached to the Bid, (which must be printed separately) in their designated order of precedence.



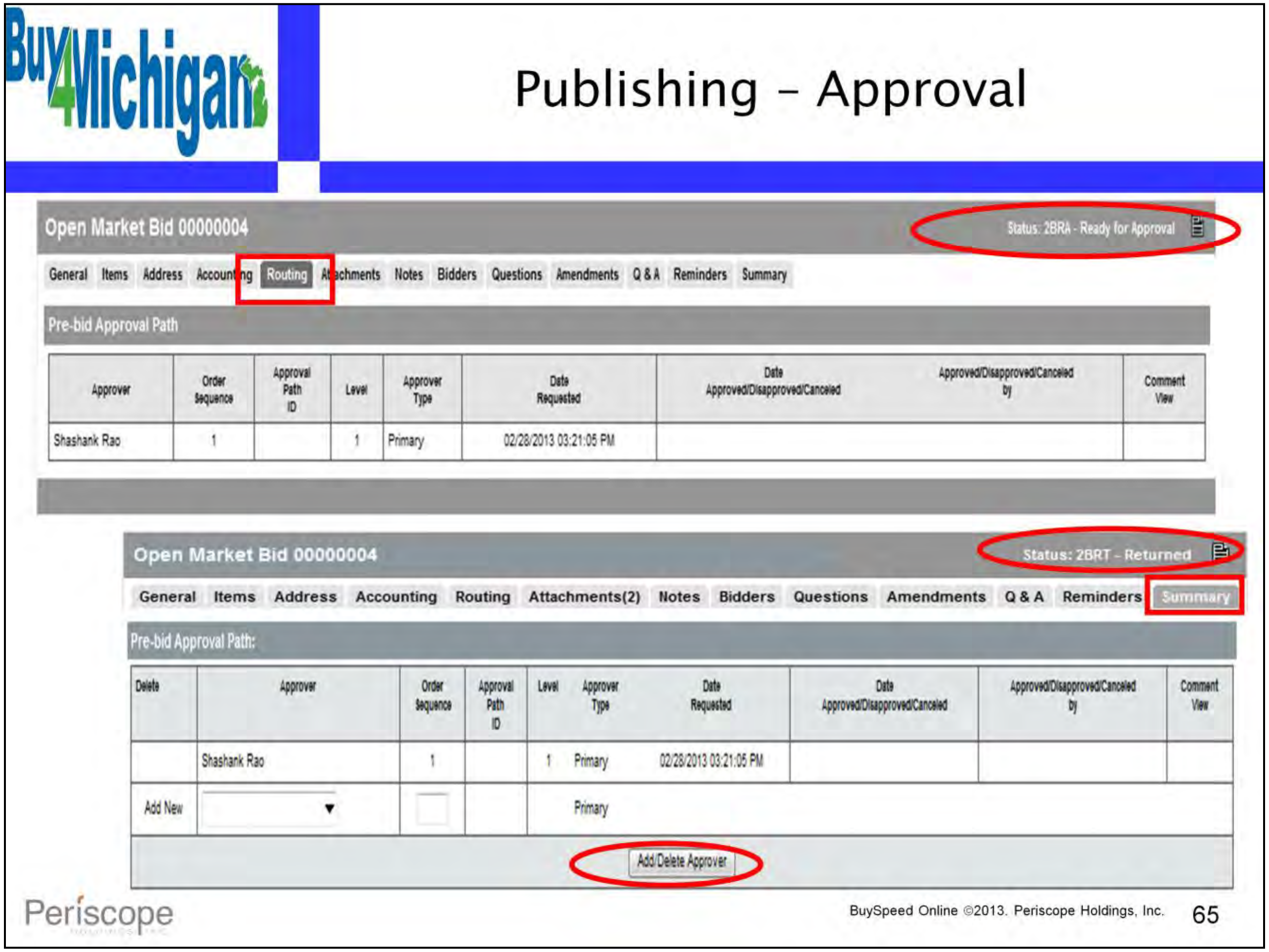
Upon clicking **Submit for Approval**, the approval path that's been triggered by the document will appear. This displays the users that must approve the document before it can be published and in what order. Upon clicking **Continue**, the approvers will be notified once it is their turn to approve. Approvers can only approve/disapprove the Bid in the order they are listed on the approval path.

If no approval path is triggered by the document, you can manually add approvers to the document by selecting a user in the **Approver** dropdown and clicking the **Add Approver** button. Once you are ready to notify the approvers, click **Save & Continue**. You will also be given the option to select **Automatic Approval**. Selecting this option automatically approves the document, allowing you to immediate publish the solicitation. Note again – only Basic Purchasing users can create or send Bids.



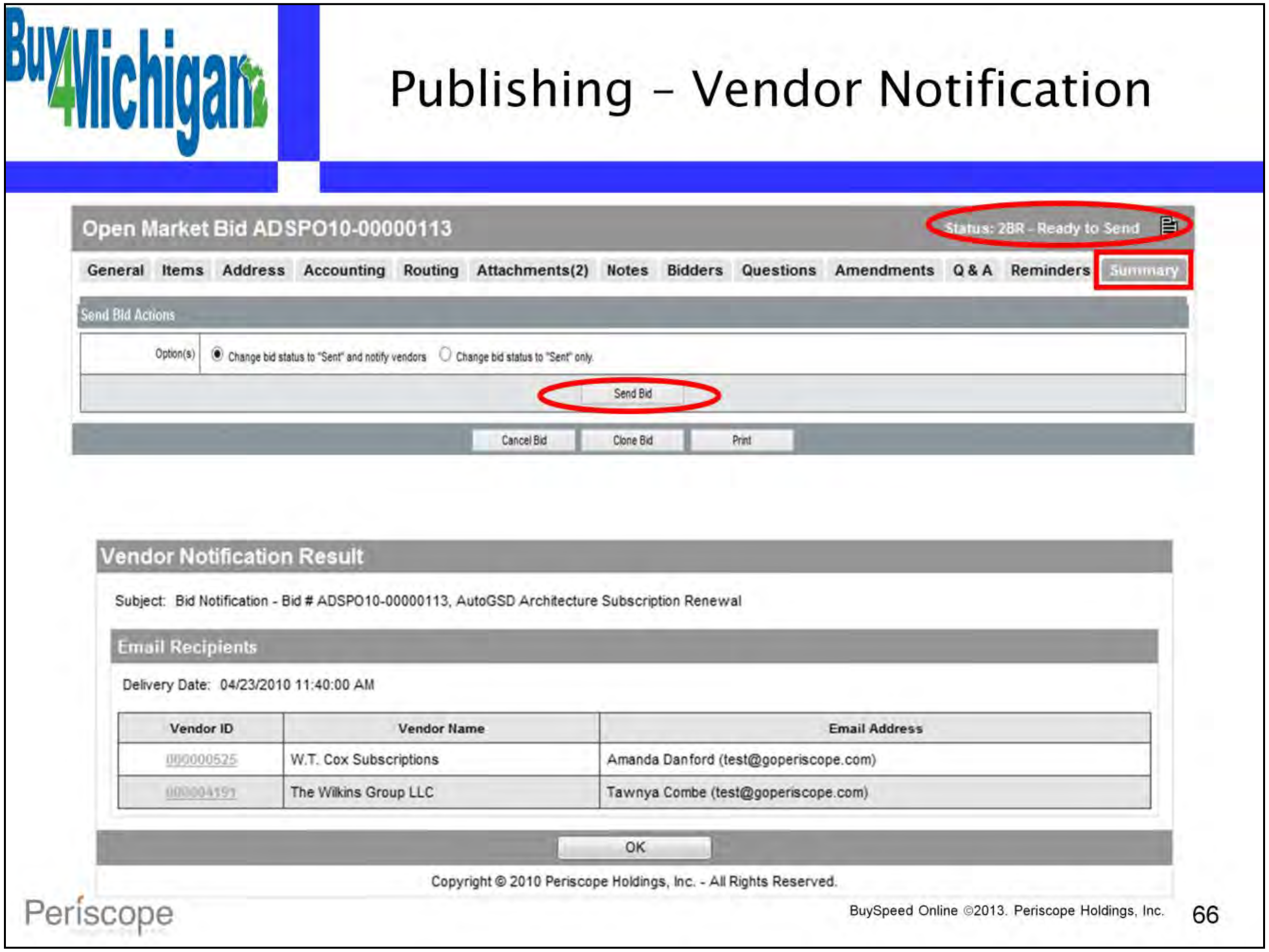
If an approver is added, on the Home screen there will be a tab for Approvals. There will be two sections, My Documents Pending Approval (documents this user has authored that are pending approval) and Documents Pending My Approval (documents that are waiting for this user to approve).

When selecting that document, at the bottom of the Summary tab, the approver will see three options: Approve, Disapprove, and Cancel Bid. Below this, will be a Comment section for approvers to enter a reason for their disapproval



During the approval process, your Bid document will be in “Ready for Approval” status. Only the Attachments, Bidders, and Reminders tabs support edits at this stage. Approvers can add additional approvers as well. You can view the status of the approval on the Routing tab, or along the bottom of the Summary tab.

If the document is disapproved, it will transition to “Returned” status and you will be notified via email. Approvers comments concerning why they disapproved the Bid will be included in the email. You can then edit the document again by clicking the **Reopen** button on the bottom of the Summary tab. This returns the document to “In Progress” status. Once you are done editing the Bid, you must submit it for approval again. If the document is approved, you will also be notified via email. The document will then be in a status of “Ready to Send,” meaning that you are now able to publish the solicitation.



To publish the solicitation, navigate to the Summary tab of the “Ready to Send” status Bid. On the bottom of the screen, you are presented with two options in the **Send Bid Actions** section. You can either select to **Change bid status to “Sent” and Notify Vendors**, which will publish the solicitation and send an email to all of the vendors added on the Bidders tab, or to **Change bid status to “Sent” only**, which will publish the solicitation, allowing vendors to access and respond, but will not send vendors an email to notify them. After you’ve made your selection, select **Send Bid**. The Bid is now in “Sent” status.

If you selected to notify the vendors, after saving, the **Vendor Notification Result** screen will display all of the vendors that were notified and the email address that the notification was sent to. This screen is not accessible again after clicking **OK**, so if it is needed for your records, you may wish to print this screen using your web browser. Note that even after sending a Bid, it will not be viewable online or allow response until the **Available Date** identified on the General tab of the Bid has been reached.

Buy4Michigan

Solicitations (Part 2) is next

Questions?

Periscope