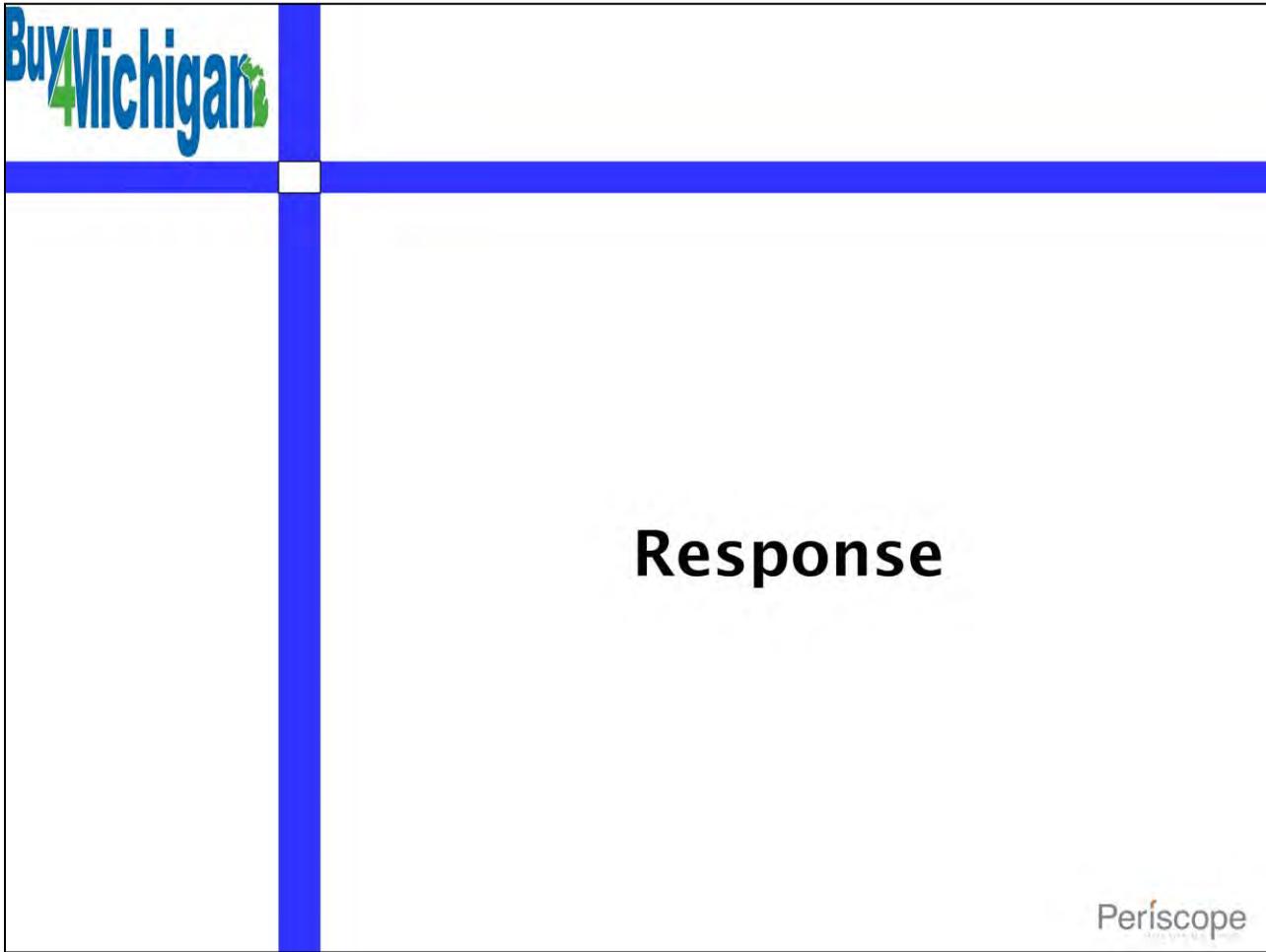


Solicitation Training (Part 2)

Agenda

- Response
- Management
 - Q & A
 - Amendments
- Opening & Review
- Proposal Revisions
- Comparing Quotes
- Evaluation
- Award Recommendation



Now that your Bid has been published, let's take a look at how vendor's are able to access and respond.

Welcome To BuySpeed Online

Buy4Michigan

- [Register](#)
Register here to begin using BuySpeed Online.
Vendors, please read this [disclaimer](#) prior to registering.
- [Complete Registration](#)
Complete registration here to begin using BuySpeed Online.
Vendors, please read this [disclaimer](#) prior to completing registration.
- [Open Bids](#)
Browse open bid opportunities.

Login ID:
Password:

[Forgot your password?](#)

© 2013 Periscope Holdings, Inc. All Rights Reserved

Periscope HOLDINGS, INC.

BuySpeed Online ©2013. Periscope Holdings, Inc. 4

Vendors are able to respond to Bids by creating and submitting a Quote document prior to the Bid Opening Date you assigned to the Bid. In order to create a Quote, vendors must be registered with Buy4Michigan and login using their own Login ID and password.

If you selected “Open Bid” as the **Bid Type** for your Bid, it can also be viewed by vendors and the public without logging in by clicking the **Open Bids** link on the Buy4Michigan login screen.

Open Bids

Show Bids for Category All

Bid(1)

Bid #	Alternate Id	Buyer	Description	Purchase Method	Bid Opening Date	Bid Holder List
00000003		Shashank Rao	Training Plan A	Open Market	03/13/2013 11:23:00 AM	

Copyright © 2013 Periscope Holdings, Inc. - All Rights Reserved.

Clicking the **Open Bids** link displays a screen on which all published Open Bids are listed by published date, starting with the most recent. Open Bids are those where the Basic Purchasing user has allowed any vendor to submit a reply, not just those notified when the Bid was published.

The list can be narrowed by selecting a commodity category in the **Show Bids for Category** dropdown and selecting **Go**. Clicking on the link in the **Bid #** column will display the Bid.

Response – Login Screen Open Bids

Acknowledge Receipt and View Solicitation

Bid # 00000003
Bid Description Training Plan A

To be added to the bidholder list and receive notifications of future amendments to this solicitation, you must login to Buy4Michigan using your username and password. If you have not registered, return to the login page and complete the Registration process. If you do not want to acknowledge and be added to the bidholder list, click Proceed and the bid will be displayed.

[Proceed](#)

Bid Solicitation: 00000003

Header information

Bid Number: 00000003	Description: Training Plan A	Bid Opening Date: 03/13/2013 11:23:00 AM
Purchaser: Shashank Rao	Organization: Department of Technology Management and Budget	Allow Electronic Quote: Yes
Department: TEST01 - Test Department For Install Do Not Establish in Production	Location: TEST1 - Test Location (Bureau, etc, under Test Department)	Available Date : 02/15/2013 08:00:00 AM
Fiscal Year: 13	Type Code:	Informal Bid Flag: No
Alternate Id:	Required Date:	
Info Contact:	Bid Type: OPEN	
Purchase Method: Open Market		
Pre Bid Conference:		

Upon selecting a Bid to view from the Login Screen, users will be displayed the **Acknowledge Receipt and View Solicitation** screen. This screen displays a message configured by state administrators to communicate that in order for vendors to be added to the Bid Holder List and respond to the Bid, they will need to login. In order to just view the Bid however, you can click **Proceed**.

Upon clicking **Proceed**, a modified version of the Bid's Summary tab will display, allowing users to view the Bid and open any attachments.

Vendor Roles	Primary Functions
Seller	<ul style="list-style-type: none"> • Respond to solicitation opportunities • Acknowledge received purchase orders
Seller Administrator	<ul style="list-style-type: none"> • Manage vendor users (Sellers)



Upon logging in, the vendor’s Homepage will display. Depending upon the role the vendor is currently in, their Homepage will appear differently. Like state users, they are also limited to their current role’s access and function privileges. Vendors have only two possible roles, Seller and Seller Administrator. The table displays the primary functions of both roles.

In order to view and respond to Bids, ensure you have the Seller role selected. If they have been given only one role, then no role tabs will appear.



For non-administrative users, the vendor Homepage consists of the area below the **Home – Welcome Back (User’s Name)** label and features a series of tabs. Each tab provides links to the most recent items and documents that may require user action. The number in parentheses within each tab is the total number of items within that tab that may require action.

Identical to state user’s view, two horizontal bars (Header & Navigation bars) above the Homepage are always present on the screen while the vendor is logged in. Selecting a link or icon from these bars will take them elsewhere in the application. Note that the Header bar contains the same official system clock that is used to timestamp documents and to regulate Bid Available and Opening times.

Home - Welcome Back S Rao

News(0) Vendor Communication(0) **Bids(3)** PO(0) Quotes(0)

Request for Revision

No records found.

Bids / Bid Amendments (Un-Acknowledged)

No records found.

Open Bids

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Q & A	Create Quote /View Auction	Bid Holder
00000003	Department of Technology Management and Budget		Shashank Rao	Training Plan A	03/13/2013 11:23:00 AM	View	Create Quote	

Closed Bids

Bid #	Organization	Buyer	Description	Bid Opening Date	Awarded Vendor(s)
00000005	Department of Technology Management and Budget	Eric Jacobsen	test bid	02/28/2013 06:41:00 AM	Not awarded yet.
00000001	Department of Technology Management and Budget	Eric Jacobsen	test bid	02/22/2013 11:09:00 AM	Not awarded yet.

Upon clicking the Bids tab, four sections of documents will appear to the vendor. Within each section, the five most recent matching documents displays, and if more than five documents match that type, a **View More** link will be available at the bottom of each section allowing vendors to view a complete list.

Displayed are the **Request for Revision** and **Bid / Bid Amendments (Un-Acknowledged)** sections. The **Request for Revision** section displays a list of the vendor's Quotes that the vendor has been asked to submit a revision for, and the **Bids / Bid Amendments (Un-Acknowledged)** section displays a list of the Bids where the vendor is on the bidders or Bid Holder List but has not yet acknowledged either the Bid itself, or an Amendment to the Bid.

Response - Homepage Bids Tab (cont.)

Home - Welcome Back S Rao

News(0) Vendor Communication(0) **Bids(3)** PO(0) Quotes(0)

Request for Revision

No records found.

Bids / Bid Amendments (Un-Acknowledged)

No records found.

Open Bids

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Q & A	Create Quote /View Auction	Bid Holder
00000003	Department of Technology Management and Budget		Shashank Rao	Training Plan A	03/13/2013 11:23:00 AM	View	Create Quote	

Closed Bids

Bid #	Organization	Buyer	Description	Bid Opening Date	Awarded Vendor(s)
00000005	Department of Technology Management and Budget	Eric Jacobsen	test bid	02/28/2013 06:41:00 AM	Not awarded yet.
00000001	Department of Technology Management and Budget	Eric Jacobsen	test bid	02/22/2013 11:09:00 AM	Not awarded yet.

The remaining two sections on the Bids tab for vendors are the **Open Bids** and **Closed Bids** sections. The **Open Bids** section displays a list of the Bids for which the vendor is able to respond, meaning that they have not yet reached their Bid Opening Date, and that either the Bid allows any vendor to respond, or that if not, this vendor was on the bidders list.

The **Closed Bids** section displays a list of the Bids that the vendor can no longer submit a response to because the response period has ended.

Open Bids

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Q & A	Create Quote /View Auction	Bid Holder
<u>00000003</u>	Department of Technology Management and Budget		Shashank Rao	Training Plan A	03/13/2013 11:23:00 AM	View	Create Quote	

Acknowledge Receipt and View Solicitation

Bid # 00000003
Bid Description Training Plan A

Click Yes to acknowledge the download of the bid. When you acknowledge a bid, you may receive any future correspondence regarding this document. If you do not want to acknowledge click No, and the bid will be displayed. Do you want to continue?

Periscope

BuySpeed Online ©2013. Periscope Holdings, Inc. 11

To begin responding to a Bid, the vendor can either click the link in the **Bid #** column or select the **Create Quote** link in the **Create Quote / View Auction** column for the Bid they wish to respond to in the **Open Bids** section. Generally, the vendor will want to view the Bid before creating a new Quote, and will select the link in the **Bid #** column.

Upon selecting a Bid to view, the vendor is displayed the **Acknowledge Receipt and View Solicitation** screen, which allows the vendor to acknowledge the Bid. By clicking **Yes** on this screen, the vendor will be placed on the Bid Holder List, receive any future correspondence regarding the Bid, and be displayed the Bid. By clicking **No**, the vendor will just be displayed the Bid.

Bid Solicitation: 00000001

Header Information

Bid Number: 00000001	Description: test bid	Bid Opening Date: 02/22/2013 11:09:00 AM
Purchaser: Eric Jacobsen	Organization: Department of Technology Management and Budget	
Department: TEST01 - Test Department For Install Do Not Establish in Production	Location: TEST1 - Test Location (Bureau, etc. under Test Department)	
Fiscal Year: 13	Type Code:	Allow Electronic Quote: Yes
Alternate Id:	Required Date:	Available Date : 02/05/2013 10:51:00 AM
Info Contact:	Bid Type: OPEN	Informal Bid Flag: No
Purchase Method: Open Market		

Pre Bid Conference:

Bulletin Desc:

Ship-to Address: Test Contact Name - Required
Test Address Line 1 - Required
Test Address Line 2 - Optional
Test Address Line 3 - Optional
Test Address Line 4 - Optional
Lansing, MI 48933
US
Email: testrequiredaddresscontactemail@periscopeholdings.com
Phone: (555)555-5555 Ext. 5555

Bill-to Address: Test Contact Name - Required
Test Address Line 1 - Required
Test Address Line 2 - Optional
Test Address Line 3 - Optional
Test Address Line 4 - Optional
Lansing, MI 48933
US
Email: testrequiredaddresscontactemail@periscopeholdings.com
Phone: (555)555-5555 Ext. 5555

Print Format:

Funding Source:

Amendments:

Amendment #	Amendment Date	Amendment Note
1	02/05/2013 10:10:07 AM	Header 1, Bid Opening Date changed from "02/15/2013 10:51:00 AM" to "02/22/2013 11:09:00 AM".

Item Information

Item # 1: (020 - 10) item for test

NIGP Code: 020 - 10

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0		EA - Each				

Manufacturer: Brand: Model:
Make: Packaging: No
This product was manufactured within the United States and the cost of domestic components exceeds 50% of all components.
Brand-specific, Brand or Equivalent or Alternates Considered:

Bid Tab Print Page Bid Q & A Exit

This image illustrates how the bid will display to the vendor.

Print Page Create Quote Bid Q & A Exit

Open Market Bid ADSP010-00000113

Current Q & A for this bid:

Question #	Created Date	User Created	Question Subject	Question	Answer
1	04/25/2010	Chris Harris	Instructions	Which takes precedence, the Uniform or Special Instructions?	The Special Instructions.

Add new questions:

Question Subject	Question (max 2000 characters)
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Save & Exit Save & Continue Reset Cancel & Exit

Copyright © 2010 Periscope Holdings, Inc. - All Rights Reserved.

BuySpeed Online ©2013. Periscope Holdings, Inc.
13

Once the vendor decides whether to acknowledge the Bid, the Bid document will display. It will appear just as it did from the **Open Bids** screen accessed from the Login screen. On the bottom of the screen, a **Bid Q & A** button will appear, enabling the vendor to view any questions that you have posted and responded to via the Q & A tab on your Bid. If you selected to allow vendors to submit questions on the Q & A tab, an **Add new questions** section will appear enabling the vendor to ask you questions that will appear on your Bid's Q & A tab to answer.

Print Page Create Quote Bid Q & A Exit

New Quote

General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary Back to Bid

Quote #: Bid #: 00000003

Organization: Department of Technology Management and Budget

Status: In progress Description*: Training Plan A

Delivery Days: 0 Discount Percent: 0.0 %

Is "No Bid":

Shipping Terms: Alternate Bid:

Ship Via Terms: Freight Terms:

Promised Date: (MM/DD/YYYY) Payment Terms:

Info Contact:

Comments:

Date Last Updated: User Last Updated:

Save & Continue

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 14

Selecting the **Create Quote** button from the bottom of the Bid opens a New Quote document for the vendor, enabling them to submit a response to the solicitation. The process for completing a Quote mimics the process for Bids and other documents in Buy4Michigan. The user must work through the tabs along the top, completing all required fields before submitting the document from the Summary tab. Before the Quote is assigned a number and can be accessed later, the vendor must first complete the General tab. All required fields on this tab come pre-completed, so all the vendor must do is click **Save & Continue**.

The other fields on the General tab allow the vendor to input their desired shipping, freight and payment terms, the expected

delivery days for any goods being solicited, including a promised date, any standard discount percentage that would apply to all items on the Bid, their contact information and any other comments regarding the Quote. Two check boxes also appear. Is **“No Bid”** denotes that the vendor’s response is that they are not bidding on the items. **Alternate Bid**, when checked, means that the vendor has submitted another Quote, and that this Quote is meant to be an alternative.

Note: If Alternate Bids will not be considered for a particular solicitation, this should be indicated to vendors on the Bid document during the solicitation.

Quote 0000001 - Rao Trading and Holding

General **Items** Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

Quote Validation Errors

- Terms & Conditions is not acknowledged

General **Items** Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

Sort by Column: Print Sequence Sort Descending

Item #	Print Sequence	Questions Exist	Description							
			Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid
1	1.0	No	Donkeys							
			10.0	EA	75.00	1.0		0.00	\$742.50	<input type="checkbox"/>
Alternate Description:										
2	2.0	No	Race Horses							
			2.0	EA	0.00	1.0		0.00	\$0.00	<input checked="" type="checkbox"/>
Alternate Description:										
Quote Response Total							\$742.50			

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 15

Upon clicking **Save & Continue** on the General tab, the screen will refresh and a validation error will appear along the top of the screen that the vendor has yet to acknowledge the Terms & Conditions. Vendors are able to do this from the Terms & Conditions tab.

The next tab over is the Items tab which enables the vendor to provide a price quote for each of the items you setup on your Bid. In addition, vendors are able to provide any standard discount percentage for each item, select a tax rate, enter applicable freight charges per item, and provide an **Alternate Description** of each item, if they don't offer what's been described. The **No Bid** check box is automatically selected until the vendor provides a price quote for an item, at which point it

is un-selected. Selecting the **No Charge** check box indicates that the vendor provides the item free of charge.

Quote 00000001 - Rao Trading and Holding

General Items **Questions** Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

Question #	Required	Question	Response
1	Yes	Have you read and agreed to all the terms and conditions attached?	<input checked="" type="radio"/> Yes <input type="radio"/> No

Save & Continue

The Questions tab is where any questions that you setup on the Bid will appear. If you made any questions required, a validation error will appear along the top of the screen on this tab until all required questions are answered. Vendors answer questions by choosing from the available options or entering data in any text fields if provided and selecting **Save & Continue**.

Question #	Required	Question	Response
1	Yes	Have you read and agreed to all the terms and conditions attached?	<input checked="" type="radio"/> Yes <input type="radio"/> No

The Subcontractors and Notes tabs will not be applicable on most Quotes for vendors. The Subcontractors tab will only display data if you specified on your Bid that certain rules for subcontractors, either regarding their business classification, or their award percentage. The Notes tab enables vendors to input internal notes, just like the Notes tab on the Bid document. Only other users for this vendor accessing this Quote will be able to see these notes.

Response – Terms & Conditions Tab

Quote 00000001 - Rao Trading and Holding

General Items Questions Subcontractors Notes **Terms & Conditions** Attachments Summary [Back to Bid](#)

Do you accept the terms & conditions of the bid? Yes Yes with exceptions No

If you do not fully accept the terms & conditions, please note the exceptions below:

Save & Continue

The Terms & Conditions tab displays a list of all the files you attached to the Bid, which can be downloaded and/or viewed by clicking the link in the **File Name** column. Before vendors are able to submit their Quote, they must select a button option indicating their acceptance of the Terms & Conditions of the Bid. Selecting either **Yes with exceptions** or **No** will require that the vendor input text in the field below explaining their exceptions to the Terms & Conditions.

Quote 00000001 - Rao Trading and Holding

General Items Questions Subcontractors Notes Terms & Conditions **Attachments(1)** Summary [Back to Bid](#)

i Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name	Description	Confidential	Attached By	Attached Date	Delete
Bid Response		<input type="checkbox"/>	S Rao	03/11/2013	<input type="checkbox"/>

Save & Continue Add Attachment

The Attachments tab on the Quote document enables the vendor to attach relevant files to the Quote document to include as part of their response. The process for attaching files to a Quote mimics the process for Bids. After attaching a document, vendors have the ability to delete any previously attached document, as well as mark any of their attached files as confidential. Clicking the check box in the **Confidential** column next to an attachment will ensure that it is only visible to authorized logged in users from your agency, and not public users from the Login screen.

Response – Submitting a Quote

Quote 00000184 - Periscope Holdings, Inc.

General Items Questions Subcontractors Notes Terms & Conditions Attachments **Summary** [Back to Bid](#)

Header Information

Quote #: 00000184 Bid #: [A05P019-0000111](#) Status: In progress

Organization: State Procurement Office

Description: AutoGSD Architecture Subscription Renewal Delivery Days: 0 Discount Percent: 0.0

Bid Flag: Alternate Bid: No Shipping Terms:

Freight Terms: Ship Via Terms: Payment Term: Net 30

Promised Date: Info Contact: Quote Total \$1,050.00

Comment:

Date Last Updated: 04/25/2010 11:03:37 PM User last Updated: Test User

Vendor accepts the terms & conditions with no exceptions.

Item Information

Print Sequence # 2.0 : (105 - 12) AutoGSD Architecture 2011 Subscription Renewal GSD

Quantity	UDM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1.0	YR	\$500.00	0.0%	0.0%	\$0.00	\$500.00	No	No

Print Sequence # 3.0 : (050 - 10) AutoGSD Architecture 2012 Subscription Renewal GSD

Quantity	UDM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1.0	EA	\$550.00	0.0%	0.0%	\$0.00	\$550.00	No	No

Print Submit Quote Cancel Quote

From the Summary tab, the vendor can view all of the information they input on their Quote document. Along the bottom of the screen, button options exist allowing the vendor to **Print**, **Submit**, and **Cancel** their Quote. Once submitted, the vendor can withdraw it at any point up until the Opening Date you chose for the Bid. In order for the Quote to be considered for award however, the vendor must re-submit the Quote prior to the Bid Opening Date/Time.

Management

Management – Finding Your Bid

The screenshot shows the 'Documents' dropdown menu with the following items: Requisitions, POs, Receipts, Invoice, Quotes, New, Ready To Open, In Progress, Ready for Approval, Ready to Send, Opened, Returned, Evaluated, Approved, Bid to PO, and Canceled. Below this is the 'Bids - Sent' table with the following data:

Bid #	Organization	Buyer	Description	Purchase Method	Bid Opening Date	Open Quotes	Quote History	Bid Holder
00000006	Department of Technology Management and Budget	Shashank Rao	Closed Bid Test	Open Market	05/01/2013 07:28:00 AM			List
00000003	Department of Technology Management and Budget	Shashank Rao	Training Plan A	Open Market	03/13/2013 11:23:00 AM			List

Buttons at the bottom of the table include 'View All' and 'Exit'.

While your Bid is available for response, it is in “Sent” status. During this status, no action regarding the document is required on your part. Therefore, the Bid document is not available via one of the tabs on your Homepage. Instead, to access the Bid, use the **Documents** dropdown from the Navigation Bar. Hovering your mouse over **Bids** will display a list to the right of all available statuses of that document. Select **Sent** from this list to view your “Sent” Bids by the most recent.

Bids in “Sent” status allow four primary actions, including viewing the vendors that have acknowledged receipt of the Bid and responded, managing Q & A regarding the solicitation, creating and applying amendments to the solicitation, and opening the Bid to view the submitted responses once the Opening Date has been reached.

Bids - Sent

Bid(2)

Bid #	Organization	Buyer	Description	Purchase Method	Bid Opening Date	Open Quotes	Quote History	Bid Holder
00000006	Department of Technology Management and Budget	Shashank Rao	Closed Bid Test	Open Market	05/01/2013 07:28:00 AM			List
00000003	Department of Technology Management and Budget	Shashank Rao	Training Plan A	Open Market	03/13/2013 11:23:00 AM			List

View All Exit

Solicitation Holder List - 00000003

Solicitation Name: Training Plan A Buyer: Shashank Rao

Solicitation #: 00000003 Opening Date: 03/13/2013 11:23:00 AM

Send Mail	Date Acknowledged	Contact Name, Company Name, Address, Phone & Fax	File Sent	File Downloaded
<input type="checkbox"/>	03/11/2013 07:28:47 AM	Contact Person: S Rao Rao Trading and Holding 58595 Northwest Highway Dallas, TX, 75000 Phone: (214)214-2114 Fax: Email address: srao@periscopeholdings.com		

Send Mail Cancel

From the list of Bids that appears from the Navigation bar, clicking **List** from the **Bid Holder** column will display a list of vendors that have viewed and acknowledged your Bid, meaning they've elected to be informed about any amendments to the document. If desired, you can send selected vendors on the Bid Holder List an email through the system by clicking the check box in the **Send Mail** column next to the vendors you'd like to contact and selecting the **Send Mail** button along the bottom of the screen.

This will display a form that allows you to build an email, including fields for Additional Emails, a Subject and Text, which is the body of the email. A list of all the attachments included on the Bid appears below. Selecting the check box next to any of them will attach the document to the email. Once finished building the email, click the **Send** button to deliver the email. Note that

you will not receive a copy of the email or have it in your email's "Sent" folder, so if you need a record of the email, include your email in the **Additional Email** field.

Open Market Bid 00000003 Status: TEE - Sent

General Items Address Accounting Routing Attachments Notes **Bidders** Questions Amendments Q & A Reminders Summary
 General Subcontractors Quote Activity

Select bidder participation, open or closed, and select vendors to notify

Unrestricted bid, all vendors can view and respond
 Restricted bid, only selected vendors can view and respond

Disable	Add To Holder List	Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method	Bid Acknowledgement Time	Notifications	Responded	Print Solicitation
<input type="checkbox"/>	<input type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>	00000005	Jacobsen Bait and Tackle	Add New Address Address: General Mailing Address - Eric Jacobsen 1815 Stanley Avenue Austin... 1815 Stanley Avenue Austin, TX 78745 US	Email		Add Manual Delivery Delivery Date: <input type="text"/> Delivery Method: <input type="text"/>	No	Print

Show Unit Prices to Vendors
 Hide Bid Holder List on Vendor Side

i Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

Save & Continue Lookup & Add Vendors Download Labels

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 24

In addition to the Bid Holder List, you can also view the list of vendors directly notified about the solicitation by accessing your Bid. This list can be viewed from either the Bidders tab, or the Summary tab in the **Bidders** field within the **Header Information** section. Next to each vendor it also displays when they were sent every notification, including of amendments, and if they've submitted a response.

From the Bidders tab, you can also add these vendors to the Bid Holder List to enable the email function described previously, and you can add new vendors and trigger a manual notification email about the Bid. Disabling a vendor removes them from the list on the **Bidders** field on the Summary tab, but not from the Bidders tab.

Open Market Bid 00000003 Status: 285 - Sent

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments **Q & A** Reminders Summary

Question #	Created Date	User Created	Question Subject	Question	Answer	Show on Web	Show Original Vendor Only	Delete
Add New:						<input type="checkbox"/>		

Allow vendor to submit questions
 Send notification when vendor submitting question

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. You may also allow vendors to submit questions through Buy4Michigan, which will appear on the Q & A tab and which allow you to respond through Buy4Michigan.

To document questions you have received from vendors regarding the solicitation, upon selecting your Bid, select the Q & A tab. The fields available on this tab allow you to enter the subject of the question, the question itself, as well as your answer to the question. Clicking the check box in the **Show on Web** tab will allow vendors accessing the Bid following publication to view the question and answer.

Open Market Bid 00000003 Status: 2B5 - Sent

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments **Q & A** Reminders Summary

Question #	Created Date	User Created	Question Subject	Question	Answer	Show on Web	Show Original Vendor Only	Delete
Add New:						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Allow vendor to submit questions
 Send notification when vendor submitting question

Save & Continue Reset

If you selected the **Allow vendor to submit questions** check box, vendors accessing the Bid following publication may have submitted questions to you electronically. These questions will automatically appear on the Q & A tab and allow you to complete the **Answer** column for them. You can then select whether to show this question and answer on the web to every vendor by selecting just the check box in the **Show on Web** column, or just to the vendor that submitted the question by selecting both the **Show on Web** and **Show Original Vendor Only** check boxes.

If you permitted vendors to 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.

BuyMichigan

Management – Creating an Amendment

Open Market Bid 00000003 Status: 2BS - Sent

General Items Address Accounting Routing Attachments Notes Bidders Question **Amendments** Q & A Reminders Summary

There are no bid amendment for this document.

Create Bid Amendment

Bid Amendment - Open Market Bid 00000003 Status: 2BS - Sent

General Attachments Summary Back to Bid

Bid Number:	00000003	Description:	Training Plan A
Status:	2BS - Sent	Purchaser:	Shashank Rao
How Solicited:	Email	Type Code:	
Department:	TEST01 - Test Department For Install Do Not Establish in Production	Fiscal Year:	2013
Location:	TEST1 - Test Location (Bureau, etc. under Test Department)	Organization:	Department of Technology Management and Budget
Show on Web:	<input checked="" type="checkbox"/>	Allow Electronic Response:	<input checked="" type="checkbox"/>
Required Date:		Bid Opening Date: (MM/DD/YYYY HH:MM:SS AM or PM)	03/13/2013 11:23:00 / <input type="text"/>
Available Date: (MM/DD/YYYY HH:MM:SS AM or PM)	02/15/2013 08:00:00 / <input type="text"/>	Purge Date:	
Bid Type:	Open Bid	Informal Bid:	<input type="checkbox"/>
Control Code:		Estimated Cost:	\$71,000.00
Print Dest Detail:		Alternate ID:	
Purchase Method:	Open Market	Solicitation Enabled:	No
Tax Rate:			
Item Single Award Only:	<input type="checkbox"/>		
Info Contact:	<input type="text"/>		
Pre-Bid Conference: (Max size: 250 characters)	<input type="text"/>		
Bulletin Desc:	<input type="text"/>		
Date Last Updated:	02/27/2013 11:24:01 AM	User last Updated:	Shashank Rao

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 27

If you determine that an amendment to the solicitation is necessary, select the Amendments tab on your Bid document. From here you'll be able to view any previously completed amendment as well as create a new amendment by clicking the **Create Bid Amendment** button. Creating a new Bid Amendment will display a copy of the Bid, but with only four tabs available to be edited.

You'll initially be shown the General tab, which only allows you to edit the **Show on Web**, **Allow Electronic Response**, **Bid Opening Date**, **Info Contact**, and **Pre-Bid Conference** fields. If any changes are made, click **Save & Exit** before proceeding through the remaining tabs.

Management – Editable Tabs

Bid Amendment - Open Market Bid 00000003 Status: 2BS - Sent

General **Items** Attachments Summary [Back to Bid](#)

Sort by Column: Print Sequence Sort Descending

Item #	Print Sequence	Item Description							Total Cost	Cancel	
		Quantity	UOM	Unit Cost	Net Unit Cost	Total Discount Amt.	Tax Rate	Tax Amount			
1	1.0	Donkeys	10.0	EA	100.00	\$100.00	\$0.00	0.0	\$0.00	\$1000.00	<input type="button" value="Cancel"/>
2	2.0	Race Horses	2.0	EA	35000.00	\$35000.00	\$0.00	0.0	\$0.00	\$70000.00	<input type="button" value="Cancel"/>
Total									\$71000.00		

Bid Amendment - Open Market Bid 00000003 Status: 2BS - Sent

General **Items** **Attachments(1)** Summary [Back to Bid](#)

Name	Description	Show Vendor	Attached By	Attached Date	Delete
Sample Attachment		<input checked="" type="checkbox"/>	Shashank Rao	03/11/2013	<input type="button" value="Delete"/>

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 28

The only other tabs on the Bid that allow amendments are the Items and Attachments tabs. On the Items tab, all information regarding every item can be edited using the same process as during the item setup process. Items can also be added and cancelled.

On the Attachments tab, attachments can be added or deleted. You can also edit whether attachments should be shown to vendors. Once done building your amendment, click on the Summary tab to review your changes, add any additional information and apply your changes.

Bid Amendment - Open Market Bid 00000003
Status: 285 - Sent

General Items Attachments(1) Summary Back to Bid

Comment for the whole bid amendment

Header/Item Changes

There are no recorded header/item changes.

Attachment Changes

Modified Field	Item #	File	Description	User Updated	Date Updated	Show to Vendor
File #	Header	Sample Attachment	File 'Sample Attachment' added	Shashank Rao	03/11/2013 08:53:13 AM	<input checked="" type="checkbox"/>

Comment:

i After you click 'Apply Bid Amendment', all the changes will be updated in the real document.

Save & Continue
Apply Bid Amendment
Delete Bid Amendment

Periscope

BuySpeed Online ©2013. Periscope Holdings, Inc. 29

On the Summary tab of your Bid Amendment, a list of each change that was made on the previous tabs displays. Within the **Description** column, an explanation of each change appears. This explanation is editable if you'd like to provide additional detail. A **Comment** field also exists along the bottom of each listed changed, enabling you to further explain any amendment. A global comment field is also available along the top of the Summary tab so that you can provide information regarding the entire amendment, if desired.

To the far right of each change a **Show to Vendor** check box allows you to decide whether to inform vendors about the change. Amendments processed to fix typographical errors are an example of changes that may not need to be sent to

vendors. By default, vendors will be informed of all changes however. If you make any changes on this screen, ensure that you select **Save & Continue** before applying the Amendment. Note that you can also select **Delete Bid Amendment** to discard the amendment and create no changes to the Bid.

Management – Applying an Amendment

After you click 'Apply Bid Amendment', all the changes will be updated in the real document and vendors will be notified if you choose to show some changes to vendor.

Save & Continue **Apply Bid Amendment** Delete Bid Amendment

Vendor Notification Result

Subject: Bid Amendment Notification - Bid # 00000003, Training Plan A

Email Recipients

Delivery Date: 03/11/2013 09:27:48 AM

Vendor ID	Vendor Name	Email Address
00000005	Jacobsen Bait and Tackle	Eric Jacobsen (ejacobsen@periscopeholdings.com)
00000011	Rao Trading and Holding	S Rao (srao@periscopeholdings.com)

OK

Periscope

BuySpeed Online ©2013. Periscope Holdings, Inc. 30

Once you are ready to apply the changes to the Bid and inform the vendors you originally informed about the Bid, and those on the Bid Holder List, select the **Apply Bid Amendment** button on the bottom of the Summary tab. Note that automated approval of amendments is not supported in Buy4Michigan. If approval of your amendment is required prior to taking effect, this must be conducted offline.

Upon applying the amendment, the changes will automatically be applied to your Bid document and the **Vendor Notification Result** screen will appear, listing the vendors that were emailed regarding the amendment, what time they were emailed and what email address was used. Note that this screen is not accessible after clicking **OK**, so if this information is needed for your records, please print this page using your internet browser.

Vendor Acknowledgement of amendments

Home - Welcome Back S Rao

News(0) Vendor Communication(0) **Bids(5)** PO(0) Quotes(1)

Request for Revision

No records found.

Bids/Bid Amendments (Un-Acknowledged)

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Holder
00000003	Department of Technology Management and Budget		Shashank Rao	Training Plan A	03/13/2013 11:23:00 AM	

Open Bids

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Q & A	Create Quote /View Auction	Bid Holder
00000006	Department of Technology Management and Budget		Shashank Rao	Closed Bid Test	05/01/2013 07:28:00 AM	View	Create Quote	
00000003	Department of Technology Management and Budget		Shashank Rao	Training Plan A	03/13/2013 11:23:00 AM	View	00000001 Create Quote	

Closed Bids

Bid #	Organization	Buyer	Description	Bid Opening Date	Awarded Vendor(s)
00000005	Department of Technology Management and Budget	Eric Jacobsen	test bid	02/28/2013 06:41:00 AM	Not awarded yet.
00000001	Department of Technology Management and Budget	Eric Jacobsen	test bid	02/22/2013 11:09:00 AM	Not awarded yet.

After a Bid Amendment has been applied, vendors will be able to acknowledge the Amendment. When the vendor logs into their screen, they will see a section listing **Bids/Bid Amendments (Un-Acknowledged)**. By clicking on the link with the Bid #, the Vendors can proceed with the acknowledgement.

Management – Vendor Acknowledgement

Bid Solicitation: 00000003

Header Information

Bid Number: 00000003 Description: Training Plan A Bid Opening Date: 03/13/2013 11:23:00 AM

Purchaser: Shashank Rao

Department: TEST01 - Test Department For Install Do Not Establish in Production

Fiscal Year: 13

Alternate Id:

Info Contact: asdfasf

Purchase Method: Open Market

Pre Bid Conference:

Bulletin Desc:

Amendments:

Amendment #	Amendment Date	
1	03/11/2013 09:27:46 AM	Attachment Changes: Header 1.
2	03/11/2013 09:29:43 AM	Header 1. Contact Info changed

Message from webpage

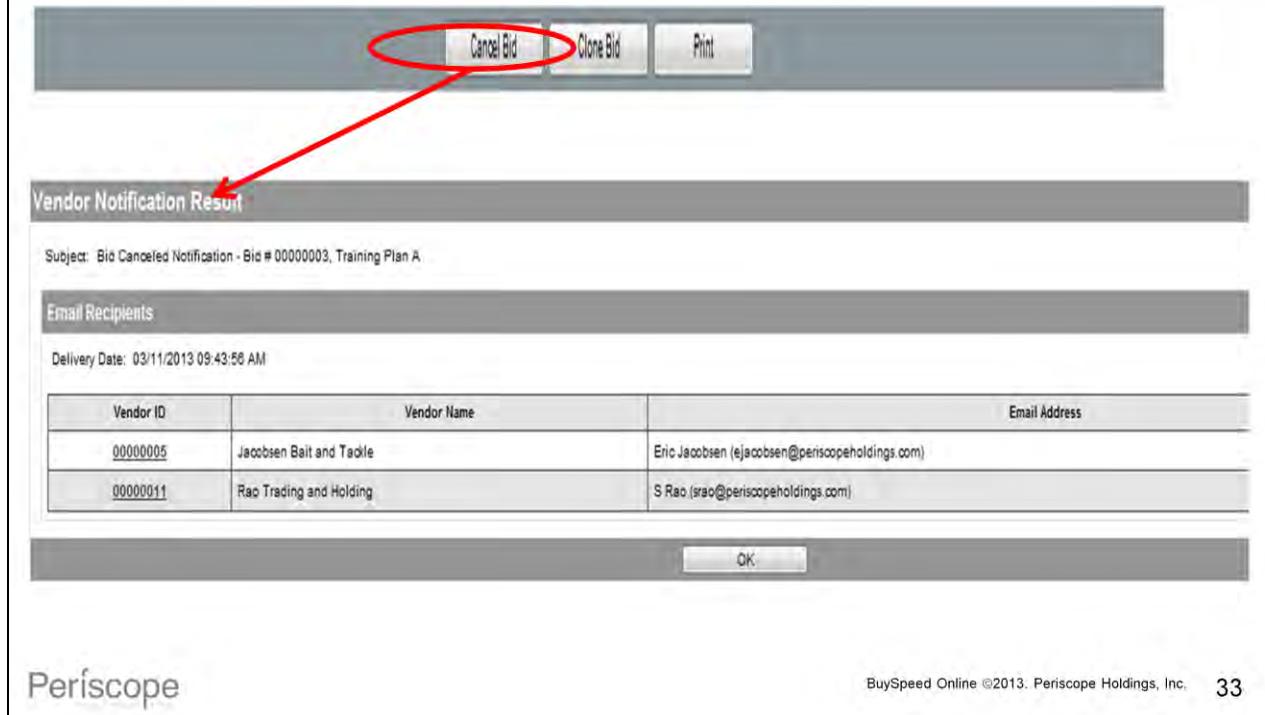
You have now acknowledged all currently available Amendments to this Bid. If you have previously submitted a Quote in response to this Bid or currently have a Quote in progress, please review it to ensure it reflects the current Bid parameters.

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 32

After a Bid Amendment has been applied, vendors will be able to acknowledge the Amendment by accessing the Bid and selecting the **Acknowledge Amendment(s)** button along the bottom of the document. Upon accessing the document, an **Amendments** field will appear within the **Header Information** section listing each Amendment that has been applied to the Bid. Clicking the **Acknowledge Amendment(s)** button will display a pop-up window informing the vendor that they have acknowledged all Amendments and reminding them to review any Quotes they have previously started or submitted.

Note that vendors will not be able to acknowledge amendments after the response period has closed. Clicking the **Acknowledge Amendment(s)** button following the Bid Opening Date will display a pop-up window that Amendments can no

longer be acknowledged because the response period has closed.



Cancel Bid Clone Bid Print

Vendor Notification Result

Subject: Bid Canceled Notification - Bid # 00000003, Training Plan A

Email Recipients

Delivery Date: 03/11/2013 09:43:58 AM

Vendor ID	Vendor Name	Email Address
00000005	Jacobsen Bait and Tackle	Eric Jacobsen (ejacobsen@periscopeholdings.com)
00000011	Rao Trading and Holding	S Rao (srao@periscopeholdings.com)

OK

Periscope

BuySpeed Online ©2013. Periscope Holdings, Inc. 33

Once your Bid has been published, if at any time you decide to terminate the solicitation by cancelling the Bid, a notification will be sent to all vendors you chose as bidders, as well as any additional vendors that have been added to the Bid Holder List.

Upon clicking **Cancel Bid** on the bottom of the Summary tab, the vendor notification screen will display a list of the vendors that have been notified regarding the Bid cancellation.

Opening & Review

Opening and Review – Verifying Responses

Home - Welcome Back Shashank Rao

News(0) Reqs(0) **Bids(5)** PO(0) Approval(0) My Reminders(0) Events(0)

In Progress(1) Ready for Approval(0) Ready to Send(1) **Ready to Open(3)** Opened(0) Approved(0)

Bid #	Buyer	Description	Bid Opening Date	Open Quotes	Quote History
00000001	Eric Jacobsen	test bid	02/22/2013 11:09:00 AM	Create new quote	No Submitted Quotes
00000005	Eric Jacobsen	test bid	02/28/2013 08:41:00 AM	Create new quote	No Submitted Quotes
00000007	Shashank Rao	Training Plan A	03/11/2013 10:10:00 AM	Open Bid	

Bids - Sent

Bids

Bid #	Organization	Buyer	Description	Purchase Method	Bid Opening Date	Open Quotes	Quote History	Bid Holder
00000007	Department of Technology Management and Budget	Shashank Rao	Training Plan A	Open Market	03/11/2013 10:10:00 AM	Open Bid		List
00000006	Department of Technology Management and Budget	Shashank Rao	Closed Bid Test	Open Market	05/01/2013 07:28:00 AM			List

[View All](#) [Exit](#)

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 35

Prior to opening your Bid, you will want to verify that responses have been received from vendors so that you will have something to review, evaluate and award. Once the Bid Opening Date/Time has been reached, your Bid will once again be accessible via the Bids tab on your Homepage within the **Ready to Open** sub-tab. It can also be accessed from the Documents dropdown menu in the Navigation bar by going to either Bids -> Sent or Bids -> Ready to Open.

If responses have been received, an **Open Bid** link will appear in the **Open Quotes** column next to the Bid. If no responses have been received a **Create Quote** link will appear in this column, allowing you enter Quotes you may have received offline. If no responses have been received, you may wish to create an amendment extending the response period by pushing back

the Bid Opening Date. Otherwise, you may wish to cancel the Bid.

Note: Purchasers cannot manually add Quotes on behalf of the vendor until the Opening Date time has been reached.

Opening and Review – Bid Opening

Home - Welcome Back Chris Harris

News(0) Reqs(27) **Bids(37)** PO(19) Approval(7) My Reminders(2) Events(0)

In Progress(3) Ready for Approval(1) Ready to Send(3) **Ready to Open(17)** Opened(11) Approved(2)

Bid #	Buyer	Description	Bid Opening Date	Open Quotes	Quote History
A05PO10-00000047	Michael Lepine	Solar Energy Systems	02/22/2010 02:23:00 PM	Open Bid	

[View More...](#)

Bids - Sent

Bid(2)

Bid #	Organization	Buyer	Description	Purchase Method	Bid Opening Date	Pre-Bid Conference	Open Quotes	Quote History	Bid Holder
A05PO10-0000113	State Procurement Office	Chris Harris	AutoGSD Architecture Subscription Renewal	Open Market	04/30/2010 11:40:00 AM				List
A05PO10-0000051	State Procurement Office	Chris Harris	Generator Maintenance for the Industrial Commission of Arizona	Open Market	02/04/2010 09:46:00 AM		Open Bid		List

[View All](#) [Exit](#)

Once you are ready to Open your Bid, clicking the **Open Bid** link will take you to the Summary tab of your now “Opened” Bid. If you navigate to the Bid without opening it, the Bid can also be opened from the Summary tab by clicking the **Open Bid** button along the bottom of the screen.

Once “Opened,” you can access the Bid Tabulation (Bid Tab) document and the Quote History for the Bid. From the Bid Tab, you can view the submitted Quotes and begin your evaluation and award process. The Quote History screen just allows you to view the submitted Quotes.

Buy4Michigan

Opening and Review – Bid Tab

Open Market Bid 00000007 Status: 280 - Opened

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

Bid Tab Cancel Bid Clone Bid **View Quote History** Print

Bid Tabulation for Bid #00000007

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Total Number of Submitted Quotes: 1

Quote #	Description	Vendor ID	Vendor Name	Submit Date	View Quote
00000002	Training Plan A	00000011	Rao Trading and Holding	03/11/2013 09:58:04 AM	View Quote

[Create/View Quote](#)

Quote History - Bid # 00000007 [Back to Bid](#)

Header Information

Bid Number: 00000007 **Description:** Training Plan A **Bid Opening Date:** 03/11/2013 10:10:00 AM

Quote History

Quote #	Vendor ID	Vendor Name	Date Submitted	Total Cost
00000002	00000011	Rao Trading and Holding	03/11/2013 09:58:04 AM	\$790.00

[Exit](#)

Periscope

BuySpeed Online ©2013. Periscope Holdings, Inc. 37

Along with the **Bid Tab** button, a **View Quote History** button will appear along the bottom of “Opened” Bids if Quotes were submitted. Clicking **View Quote History** will display a list of all submitted Quotes. You can view the Quote by clicking the link in the **Quote #** column. You can also quickly view the price quotes for each item on the Quote by clicking the **Expand** icon next to the link in the **Quote #** column.

The Bid Tab, like all documents within Buy4Michigan, is completed by working through a series of tabs, then reviewing all of the information you’ve entered on the Summary tab before submitting the document. The tabs on the Bid Tab enable you to compare Quotes, both in their entirety and specific elements, request revisions to Quotes, conduct an evaluation, attach files,

and recommend award.

Opening and Review – Quote Review

Bid Tabulation for Bid #00000007

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary Back to Bid

Total Number of Submitted Quotes: 1

Quote #	Description	Vendor ID	Vendor Name	Submit Date	View Quote
00000002	Training Plan A	00000011	Rao Trading and Holding	03/11/2013 09:58:04 AM	View Quote

Create New Quote

Quote 00000002 - Rao Trading and Holding

General Items Questions Subcontractors **Terms & Conditions** Attachments Evaluations Preference Reminders Summary

The following list constitutes all the attachments for the bid which may include supplemental terms and conditions.

File Name	Description	File Size
Sample Attachment (Test Attachment.txt)		73 bytes

Vendor accepts the terms & conditions with no exceptions.

Close Window

Bid Tabulation for Bid #00000007

Quotes Revisions Items Header Questions Subcontractors Routing **Attachments(1)** Score Summary Back to Bid

ⓘ Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name	Description	Show Vendor	Confidential	Attached By	Attached Date	Delete
Test		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Shashank Rao	03/11/2013	

Save & Continue Add Attachment

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 38

The first tab on the Bid Tab is the Quotes tab, which displays all of the Quotes that were received in response to the Bid. If you request a revision to a Quote, and one is submitted, the revised Quote will take the place of the original in this list. Click on the link in the **Quote #** column to open a pop-up window displaying that specific Quote. Selecting the **View Quote** link on the far right will open the Quote in the same screen, rather than as a pop-up. All of the tabs available to the vendor when completing the Quote are visible, except the Notes tab.

The most important information to review while viewing a vendors Quote is their attachments and their response to the Terms & Conditions. While other areas of the Bid Tab allow you to view and compare every vendor's quoted pricing by item, as well

as their answers to the questions you posed on the Bid, a vendor's attachments and Terms & Conditions response can only be viewed by looking at their Quote document.

Opening and Review – Amendment Acknowledgement

Quote 00000184 - Periscope Holdings, Inc.

General Items Questions Subcontractors Terms & Conditions Attachments(1) Evaluations Preference Reminders **Summary**

Overall Validation Warnings

- Vendor did not acknowledge all Bid Amendments

Header Information

Quote #:	00000184	Bid #:	ADSP010-00000113	Status:	Submitted
Organization:	State Procurement Office	Delivery Days:	0	Discount Percent:	0.0
Description:	AutoGSD Architecture Subscription Renewal	Alternate Bid:	No	Shipping Terms:	
Bid Flag:	Yes	Ship Via Terms:		Payment Term:	Net 30
Freight Terms:		Info Contact:		Quote Total:	\$1,050.00
Promised Date:		User last Updated:	Test User	User Created:	Test User
Date Last Updated:	04/26/2010 07:44:53 AM				

Comment:

Vendor accepts the terms & conditions with no exceptions.

Bid Acknowledgements:

Document	Amendment Note	Notifications	Acknowledged Date/Time
Amendment 1	Item 3 1. Item 3 canceled. Attachment Changes: Header 1. File 'Specifications'; File 'Specifications' added.	At bid acknowledgement	04/26/2010 12:58:25 AM

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 39

Another potentially important piece of information available only by looking at each vendor's Quote is whether they acknowledged viewing every amendment applied to the Bid. On the Summary tab of Quotes, the **Bid Acknowledgements** field displays when the vendor acknowledged each amendment. A yellow validation warning will appear on the top of the Summary tab if the vendor did not acknowledge all amendments.

This warning does not drive any system functions and is intended solely to provide you with information regarding the Quote.

Proposal Revisions

Bid Tabulation for Bid #00000007

[Quotes](#)
[Revisions](#)
[Items](#)
[Header Questions](#)
[Subcontractors](#)
[Routing](#)
[Attachments\(1\)](#)
[Score](#)
[Summary](#)
[Back to Bid](#)

[Revision](#)
[Email Communication](#)

Revision: Revision 1 ▼

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
	Rao Trading and Holding			<input type="text"/>	Create Notification

[Send Notification to Selected Vendors](#)

You can request clarifications, revisions and Best and Final Offers (BAFOs) via the proposal revision feature on the Revisions tab of the Bid Tab. Requesting a proposal revision is done by choosing a particular Quote and utilizing a system email to notify the vendor that created it that a revision is requested. A copy is then made of that Quote utilizing the same number with “-RX” appended to the end, where “X” is the number of revisions that have been requested for that Quote. This new copy of the Quote is made editable to the vendor until you close the revision process.

While the revision process remains open, you will be prohibited from recommending award and the vendor can submit and withdraw their Quote as needed. They are also able to acknowledge any amendments that were applied to the Bid prior to the

Bid Opening Date.

Proposal Revisions – Requesting Revisions

Bid Tabulation for Bid #00000007

Quotes Revisions Items Header Questions Subcontractors Routing Attachments(1) Score Summary [Back to Bid](#)

Revision Email Communication

Revision: Revision 1 ▾

Request Revision	Vendor	Quote History	Submit Date	Due Date*	Notification Actions
<input type="checkbox"/>	Rao Trading and Holding				Create Notification

Send Notification to Selected Vendors

Select month

Change year

April 2010						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

AM ▾ 11 ▾ 51 ▾ 00 ▾

Select time

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 42

To request a revision, first you'll need to decide which vendors you'd like to request a revision from and to determine if you would like to send multiple vendors the same revision request email, or if you will need to personalize the request email for individual vendors.

To send the same request to multiple vendors, pick a **Due Date** for each revision by clicking the calendar icon, then select the check box in the **Request Revision** column for each vendor to receive the request email and click the **Send Notification to Selected Vendors** button on the bottom of the screen. To send a revision request to one vendor, pick the **Due Date** for that vendor's revision, then click the **Create Notification** button in the **Notification Actions** column next to the vendor you'd like to request a revision from.

Note that the date selected in the **Due Date** column does not effect when you are able to cutoff the revision process and view a vendor's

submitted revision. At any point you can close the revision process and either start again or continue with the evaluation and award process.

Proposal Revisions – Revision Request Email

The screenshot shows the 'Send Quote Revision Email' interface. The form includes fields for 'Vendor Recipients' (Periscope Holdings, Inc.), 'Additional Email Recipients', 'From' (Chris Harris (charris@goperiscope.com)), 'Subject*', and 'Text*'. A 'Message from webpage' dialog box is overlaid, asking for confirmation: 'By clicking yes, the vendor will be notified of this request and will have the ability to revise their response. No changes may be made to the request or due date once done. Do you wish to continue?'. The dialog has 'OK' and 'Cancel' buttons. A red arrow points from the 'Send Revision Request' button (circled in red) to the dialog box. Below the form is an 'Attachments' section with 'No Attachments' and a file upload area with 'File:', 'Description:', 'Browse...', and 'Upload Attachment' buttons. At the bottom are 'Send Revision Request' and 'Cancel & Exit' buttons. The Periscope logo is in the bottom left, and 'BuySpeed Online ©2013. Periscope Holdings, Inc. 43' is in the bottom right.

Next, the **Send Quote Revision Email** screen will display enabling you to develop the email message that will be sent requesting the proposal revision(s), including adding **Additional Email Recipients**, a **Subject**, **Text** (body), and **Attachments**. Once complete, click the **Send Revision Request** button along the bottom of the screen. A pop-up message will display confirming your intent to make vendors' Quotes editable and to send the email.

Note that the **Text** field does not support standard formatting, so it is recommended that you limit the text in this field and include any instructions in attached documents. Also note that this email will not appear in your email's Sent folder, so if you need a copy for your records, include your own email in the **Additional Email Recipients** field.

Proposal Revisions – Revision Request Response

Home - Welcome Back S Rao

News(0) Vendor Communication(0) **Bids(3)** PO(0) Quotes(2)

Request for Revision

Quote #	Organization	Bid #	Bid Opening Date	Date Last Modified
00000002-R1	Department of Technology Management and Budget	00000007	03/11/2013 10:10:00 AM	03/11/2013 09:58:04 AM

Quote 00000002-R1 - Rao Trading and Holding

General Items Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

Other Quotes for this bid by the same vendor: 00000002

Quote #: 00000002-R1 Bid #: 00000007

Organization: Department of Technology Management and Budget

Status: In progress Description:

Delivery Days: Discount Percent: %

is "No Bid": Alternate Bid:

Shipping Terms: Freight Terms:

Ship Via Terms: Payment Terms:

Promised Date: (MM/DD/YYYY)

Due Date for Response: 03/12/2013 11:24:00 AM

Info Contact:

Comments:

Date Last Updated: 03/11/2013 09:58:04 AM User Last Updated: S Rao

[Save & Continue](#) BuySpeed Online ©2013. Periscope Holdings, Inc. 44

Vendors will be able to access their editable Quote from the **Request for Revision** section on the Bids tab of their Homepage. The editable Quotes that display in this section are sorted from newest to oldest. Upon selecting the link in the **Quote #** field, all fields will be open for editing, allowing the vendor to change all aspects of their Quote, including their item price quotes, question answers, Terms & Conditions response and exceptions, and attachments. After completing the editing process, the vendor can submit their revision by clicking **Submit Quote** from the Summary tab. Revisions can be submitted and withdrawn as desired by the vendor until you choose to close this revision round.

Note that if a revision round has been closed, and the vendor never submitted a response, the copy of their Quote that was

created to allow editing will continue to appear on their Homepage under the **Request for Revisions** section. However, upon selecting the Quote, a pop-up message will display alerting the vendor that the revision process for that Quote was ended. At that point, the Quote will disappear from their Homepage.

Proposal Revisions – Closing Revision Rounds

Bid Tabulation for Bid #00000007

Quotes Revisions Items Header Questions Subcontractors Routing Attachments(1) Score Summary [Back to Bid](#)

Revision Email Communication

Revision: Revision 1 ▼

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
	Rao Trading and Holding	View	03/11/2013 09:58:04 AM	03/12/2013 11:24:00 AM	Notification ready to be sent to srao@periscopeholdings.com at 03/11/2013 11:25:16 AM

Close Revision Process

Bid Tabulation for Bid #00000007

Quotes Revisions Items Header Questions Subcontractors Routing Attachments(1) Score Summary [Back to Bid](#)

Revision Email Communication

Revision: Revision 2 ▼

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
<input type="checkbox"/>	Rao Trading and Holding			<input type="text" value=""/>	<input type="button" value="Create Notification"/>

Send Notification to Selected Vendors

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 45

Once you are ready to review the revised Quotes, return to the Revision tab on the Bid Tab of your Bid and click the **Close Revision Process** button on the bottom of the screen. If a revision was submitted by a vendor, that revised Quote will replace their original on the Bid Tab. You are now able to continue with evaluation and award, or you can conduct another revision round by selecting the next round in the **Revision** dropdown and then starting the request process again.

Comparing Quotes

BuyMichigan

Comparing Quotes - Items Tab

Bid Tabulation for Bid #00000007

Quotes Revision **Items** Header Questions Subcontractors Routing Attachments(1) Score Summary Back to Bid

Bid Award Validation Warnings

- The following items are not awarded [1, 2]

of Quotes per page: 5 Sort by: Quote Total Ascending

Total Item Count: 2 Total Awardable Quote Count: 1 Bid Status: 2BO - Bid Opened (Quotes received and opened. Ready for tabulation)

i Please make sure that you save your changes before you navigate to another page.

Cancel	Item info/Quote info	(0000001)Rao Trading and Holding <Quote: 0000002>
<input type="checkbox"/>	Donkeys Item #:1 Print Sequence:1.0 Status:2BO - Opened Quantity:10.0 Uom:EA	\$79.00 **
<input type="checkbox"/>	Race Horses Item #:2 Print Sequence:2.0 Status:2BO - Opened Quantity:2.0 Uom:EA	No Bid NB

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 47

Now that you are content with the Quotes that have been received, proceed to the Items tab to begin comparing the Quotes. Each item on the Bid is listed with the price by vendor. You can sort and organize the list to enable different comparisons as needed.

Note that this is also the tab where you are able to recommend award. This process is covered in the **Award** section of this training.

Comparing Quotes - Header Questions Tab

Bid Tabulation for Bid #ADSP010-0000031

[Quotes](#)
[Revisions](#)
[Items](#)
[Header Questions](#)
[Subcontractors](#)
[Routing](#)
[Attachments](#)
[Score](#)
[Summary](#)
[Back to Bid](#)

of Quotes per page: 5 Sort by: Quote Total Ascending

Question/Answer	000000085 Periscope Holdings, Inc.	000000188 .123-Awards.com
#1: Provide years experience providing services specified in this solicitation	5	3
#2: Provide Key Personnel qualifications, experience.	very qualified	adequate qualifications

The Header Questions tab displays a list of all the header-level questions you entered via the Questions tab on the Bid and provides for a side-by-side comparison of the responding vendors' answers.

Evaluation

Bid Tabulation for Bid #00000007

Quotes Revisions Items Header Questions Subcontractors Routing Attachments(1) **Score** Summary Back to Bid

Maintain ScoreEntry Score Summary

Scorecard Creation/Maintenance

Scoring Component Description	Weight	Delete
<input type="text"/>	<input type="text" value="0.0"/>	<input type="checkbox"/>

total: 0.0 subTotal: 0.0

Hide pricing from scorers Display scoring summary to scorers Display scoring detail to scorers

Scorer Creation/Maintenance

ScorerName	Delete
<input type="text"/>	<input type="checkbox"/>

Save & Continue Save & Exit Reset Cancel & Exit

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 50

The Score tab on the Bid Tab allows you to manage the solicitation evaluation process. On the Maintain sub-tab you are able to create the scoring components and choose the scorers.

Note that it is NOT required to use the scoring tool within Buy4Michigan. Evaluations can be also be conducted offline, but they documentation related to this process should be attached to the Bid Tab.

Bid Tabulation for Bid #00000007

Quotes Revisions Items Header Questions Subcontractors Routing Attachments (1) **Maintain** Score Summary Back to Bid

ScoreEntry Score Summary

ERROR

- The total of the weight should be equal to 100
- Scorer is required.

Scorecard Creation/Maintenance

Scoring Component Description	Weight	Delete
References	30.0	<input checked="" type="checkbox"/>
	0.0	
total: 30.0	subTotal: 30.0	

Hide pricing from scorers Display scoring summary to scorers Display scoring detail to scorers

Scorer Creation/Maintenance

ScorerName Delete

Save & Continue Save & Exit Reset Cancel & Exit

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 51

To add a scoring component, type in the name of the component (e.g. References, Pricing, etc.) in the **Component** column, then provide the component a scoring weight. The weight of all your components must add up to 100. Once you are done setting up one component, click **Save & Continue** and another field will become available for adding another component.

Until your scoring components' weights add up to 100, an error message will appear along the top of this screen. An error will also appear until you have added a scorer.

Bid Tabulation for Bid #00000007

Quotes Revisions Items Header Questions Subcontractors Routing Attachments(1) **Score** Summary Back to Bid

Maintain ScoreEntry ScoreSummary

Scorecard Creation/Maintenance

Scoring Component Description	Weight	Delete
References	30.0	<input type="checkbox"/>
Price	70.0	<input type="checkbox"/>
	0.0	
total:	100.0	subTotal: 100.0

Hide pricing from scorers Display scoring summary to scorers Display scoring detail to scorers

Scorer Creation/Maintenance

ScorerName	Delete
Rao, Shashank	<input type="checkbox"/>

Save & Continue Save & Exit Reset Cancel & Exit

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 52

Only users from your Organization can be added as scorers to a solicitation in Buy4Michigan. Any others who need to act as scorers will need printouts of relevant documents or need to be included in a web conference to review them with those who have access. Select the scorers from the names in the dropdown box within the **Scorer Creation/Maintenance** section, selecting **Save & Continue** to open up new fields to select more scorers as needed. Once you save this screen, scorers will be notified automatically by the system that they can view the Bid and provide scores.

Note that directly above the **Scorer Creation/Maintenance** section there are three check boxes. These allow you to display or hide certain aspects of the Bid to your scorers. Checking **Hide pricing from scorers** hides the price quotes vendors

provided from the evaluators. Checking **Display scoring summary to scorers** allows scorers to access the ScoreSummary sub-tab which displays the total scores for each vendor. Checking **Display scoring detail to scorers** enables scorers to view the individual scores provided by every scorer for each vendor.

Bid Tabulation for Bid #00000007

Quotes Revisions Items Header Questions Subcontractors Routing Attachments(1) **Score** Summary Back to Bid

Maintain **ScoreEntry** ScoreSummary

Scorecard Entry

User:

Vendor: Rao Trading and Holding QuoteNumber: 00000002

i Please choose vendor and save your changes before you navigate to ScoreDetail.

Scoring Component Description	Raw Score	Weight	Extended Score
References	0	30.0	0.0
Price	0	70.0	0.0
Total: 0.0		SubTotal: 0.0	

Scorer Notes for Quote

Note Date	Note
<input type="text"/>	<input type="text"/>

Cancel & Exit

Periscope

BuySpeed Online ©2013. Periscope Holdings, Inc. 53

The ScoreEntry sub-tab allows scorers to enter their scores for each vendor. To enter a score, scorers will need to select the vendor they would like to evaluate from the **Vendor** dropdown box. Upon selecting a vendor, the scoring components you created will display along with their weight. Scorers are then able to provide a score from 0-100 for each of the components. Buy4Michigan will automatically tally these scores based on the weight you provide each component.

Within the **Scorer Notes for Quote** section, the scorer can provide text explanations of the scores they entered. Upon completing the evaluation for each vendor, the scorer will need to select **Save & Continue** before selecting another vendor to evaluate. Another **Note** field will appear upon saving, allowing the evaluator to enter additional notes if needed.

Bid Tabulation for Bid #00000007

[Quotes](#)
[Revisions](#)
[Items](#)
[Header Questions](#)
[Subcontractors](#)
[Routing](#)
[Attachments\(1\)](#)
[Score](#)
[Summary](#)
[Back to Bid](#)

[Maintain](#)
[ScoreEntry](#)
[ScoreSummary](#)

ScoreCard Tabulation Summary

Score_total Sort By: Ascending # of vendors per page: 5

Total ScoreCards Count: 2 Total Quotes Count: 1

Scoring Component Description/Score	Rao Trading and Holding <00000002>
References	8.7
Price	49.0
	Total 57.7
	View Score Detail

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 54

The ScoreSummary sub-tab displays the aggregated scores for all vendors, based on the scoring components and weights you provided. You can re-sort the vendors displayed in order to view different comparisons.

Clicking the **View Score Detail** link within a vendor’s column will display the score provided by each scorer.

Note that Scorers can continue to make changes to their ScoreCard until the Bid has been Awarded.

Bid Tabulation for Bid #00000007

[Quotes](#)
[Revisions](#)
[Items](#)
[Header Questions](#)
[Subcontractors](#)
[Routing](#)
[Attachments\(1\)](#)
[Score](#)
[Summary](#)
[Back to Bid](#)
[Maintain](#)
[ScoreEntry](#)
[ScoreSummary](#)

ScoreCard Tabulation Detail for Quote # 00000002

Score_total Sort By: Ascending # of scorers per page: 5

Vendor: Rao Trading and Holding

Total ScoreCards Count: 2 Total Scorers Count: 1

Scoring Component Description/Score	Weight	Rao, Shashank Raw/Extended	Average Raw/Extended
References	30.0	29.00 /8.70	29.00 /8.70
Price	70.0	70.00 /49.00	70.00 /49.00
		Weighted Total 57.7	57.7
		View Score Note	

Clicking the **View Score Detail** link within a vendor's column will display the score provided by each scorer for that vendor. For each scorer, the Raw and Extended score is provided. The Raw score is the number between 0-100 provided by the scorer for each component. The Extended score is the vendor's score for that component after the weight you setup is applied.

To view the notes provided by a scorer for that vendor, click the **View Score Note** link in the scorer's column.

Evaluation – Attachments Tab

Bid Tabulation for Bid #00000007

[Quotes](#)
[Revisions](#)
[Items](#)
[Header Questions](#)
[Subcontractors](#)
[Routing](#)
Attachments(1)
[Score](#)
[Summary](#)
[Back to Bid](#)

i Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name	Description	Show Vendor	Confidential	Attached By	Attached Date	Delete
Test		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Shashank Rao	03/11/2013	<input type="checkbox"/>

Save & Continue

Add Attachment

If you choose to conduct the evaluation process offline, you will want to attach all documentation regarding the evaluation via the Attachments tab on the Bid Tab. The Attachments tab here works identically to the Attachments tab on the Bid. Click **Add Attachments** to find the files to attach to the Bid Tab. **Information regarding the protest period for this Bid evaluation / recommendation should also be attached to the Bid tab once it is known.**

Award

BuyMichigan

Award – Items Tab

Bid Tabulation for Bid #00000007

[Quotes](#) |
 [Revisions](#) |
 [Items](#) |
 [Leader Questions](#) |
 [Subcontractors](#) |
 [Routing](#) |
 [Attachments\(1\)](#) |
 [Score](#) |
 [Summary](#) |
 [Back to Bid](#)

Bid Award Validation Warnings

- The following items are not awarded [1, 2].

of Quotes per page: 5 |
 Sort by: Quote Total |
 Ascending |
 [Go](#)

Total Item Count: 2 |
 Total Awardable Quote Count: 1 |
 Bid Status: 2BO - Bid Opened (Quotes received and opened. Ready for tabulation)

Please make sure that you save your changes before you navigate to another page.

Cancel	Item info/Quote info	
		(00000011)Rao Trading and Holding <Quote: 00000002>
<input type="checkbox"/>	Donkeys Item #:1 Print Sequence:1.0 Status:2BO - Opened Quantity:10.0 Uom:EA	<input type="checkbox"/> \$79.00 **
<input type="checkbox"/>	Race Horses Item #:2 Print Sequence:2.0 Status:2BO - Opened Quantity:2.0 Uom:EA	No Bid NB

BuySpeed Online ©2013. Periscope Holdings, Inc. 58

Once you are ready to award your solicitation, navigate to the Items tab on the Bid Tab. You can award each item to a single vendor, to multiple vendors, or you can cancel items and award them to no one. You can also do a partial award by not awarding an item or items to any vendor, which allows you to return to the Bid Tab later to create another award.

Note that the Bid document will remain in “Opened” status until all items on the Bid have been either awarded or cancelled. This means that the Bid document, and all its associated documents, including the Bid Tab, Quotes and their attachments will not be visible to the public.

Award - Indicating Award Recommendation

Cancel	Item info/Quote info	(00000195) Independent Energy Group <Quote: 000000195>	(00000193) Arizona Solar Concepts <Quote: 000000193>	(00000192) American Solar Electric, Inc. <Quote: 000000192>	(00000190) EnergyPro, Inc. <Quote: 000000190>	(00000194) Titan Power, Inc. <Quote: 000000194>
<input type="checkbox"/>	Please submit pricing information in "Solar Energy Systems Price Sheet" as found in attachments section Item #1 Print Sequence:1.0 Status:2B0 - Opened (Narrative Item)					
<input type="checkbox"/>	Solar energy systems purchases to include design, installation, and maintenance services for energy generating facilities... Item #2 Print Sequence:2.0 Status:2B0 - Opened Quantity:1.0 Uom:EA	<input type="checkbox"/> \$400,000.00	<input type="checkbox"/> \$300,000.00 Late	<input type="checkbox"/> \$210,000.00	<input type="checkbox"/> \$168,000.00	<input type="checkbox"/> \$165,000.00
Totals: \$Vendor Gross Total:		\$400,000.00	\$300,000.00	\$210,000.00	\$168,000.00	\$165,000.00
\$ Vendor Discount:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
\$ Vendor Net Total:		\$400,000.00	\$300,000.00	\$210,000.00	\$168,000.00	\$165,000.00
\$ Preference Discount:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
\$ Evaluation Total:		\$400,000.00	\$300,000.00	\$210,000.00	\$168,000.00	\$165,000.00
\$ Vendor Freight:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
\$ Awarded:		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Eval Codes:						
Pref Codes:						
Award/Unaward All:		<input type="button" value="Award All"/> <input type="button" value="Unaward All"/>				

Awarding an item is done by clicking the checkbox next to the item within the column of the vendor to be awarded. To award all items to a vendor, select the **Award All** button within that vendor's column. Clicking the **Unaward All** button will uncheck all items you previously indicated you would like to award to that vendor.

Directly below the list of items, a row provides you with a tally of each vendor's quote totals, including any quoted discounts and freight chargers. Once you are finished awarding items, click **Save & Continue**.

Award – Award Recommendation Interim Approval

Bid Tabulation for Bid #0000007

[Quotes](#)
[Revisions](#)
[Items](#)
[Header Questions](#)
[Subcontractors](#)
[Routing](#)
[Attachments\(1\)](#)
[Score](#)
[Summary](#)
[Back to Bid](#)

Bid Tabulation Information

Attachments: [Test](#)

Total Item Count: 2 Total Awarded Quote Count: 1 Bid Status: 2BO - Bid Opened (Quotes received and opened, Ready for tabulation)

Canceled	Item info/Quote info	
	(000001)Rao Trading and Holding <Quote: 0000002>	
	Donkeys Item # 1 Print Sequence: 1.0 Status: 2BO - Opened Quantity: 10.0 Uom: EA	\$79.00 **
Yes	Race Horses Item # 2 Print Sequence: 2.0 Status: 2BC - Canceled Quantity: 2.0 Uom: EA	No Bid NB
	Totals: \$ Vendor Gross Total:	\$790.00
	\$ Vendor Discount:	\$0.00
	\$ Vendor Net Total:	\$790.00
	\$ Preference Discount:	\$0.00
	\$ Evaluation Total:	** \$790.00
	\$ Vendor Freight:	\$0.00
	\$ Awarded:	\$790.00
	Eval Codes:	NI
	Pref Codes:	

Evaluation Code Descriptions:
 ** = Low Item Price
 NB = No Bid
 NI = Did Not Bid All Items

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 60

The solicitation award process is almost complete. The next step is to submit your award recommendation(s) for approval. On the Summary tab of the Bid Tab you can review your award recommendations before selecting **Submit for Approval**.

While the approvals necessary for your recommendation may be different, the approval process that follows is the same as when you submitted your Bid for approval to be published.

Award – Award Recommendation Interim Approval

NIGP Code Browse | My Account | Customer Service | About Current Organization: Department of Technology Management and Budget

Home | Items | Documents | Vendors Quick Buy Find It

Open Market Bid 00000001

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

Manually add approvers
 Automatic approval

Please select an approver if you want to manually add approvers.

Approver

Copyright © 2013 Periscope Holdings, Inc. - All Rights Reserve

BuySpeed Online ©2013. Periscope Holdings, Inc. 61

Now it is time to “approve” the award recommendation. Since protest periods and any external (Ad Board, Natural Resources, Civil Service Commission, etc.) approvals will still occur in ADPICS in Phase 1, and since only converting a Bid to PO(s) will allow vendors to see the Bid Tab and associated recommendation / protest information, typically, the Buyer submitting the evaluated Bid tab for approval will simply Automatically approve the Bid tab (recommendation). This constitutes the buyer’s recommendation based on a completed evaluation process.



Award Recommendation – Notification

Bid # 00000007 has been awarded

The following vendor(s) have been awarded all or part of the bid:

Periscope Holdings, Inc.]

Please review the Bid Tab for details and an attachment explaining the protest process.

Thank you for your participation.

Once award of the solicitation has been approved, you and all the vendors that submitted Quotes will be notified via an email listing the awarding vendors.



Award Recommendation - Convert to In-Progress PO to allow vendors to see Bid Tab / Recommendation

Bid Tabulation for Bid #00000007

Quotes Revisions Items Header Questions Subcontractors Routing Attachments(1) Score **Summary** Back to Bid

Bid Tabulation information

Attachments: [Test](#)

Total Item Count: 2 Total Awarded Quote Count: 1 Bid Status: 2BA - Bid Approved (Ready for Vendor Awarding)

Cancelled	Item Info/Quote Info	(00000011)Rao Trading and Holding <Quote: 00000002>
	Donkeys Item #1 Print Sequence:1.0 Status:2BA - Approved Quantity:10.0 Uom:EA	\$75.00 **
Yes	Race Horses Item #2 Print Sequence:2.0 Status:2BC - Canceled Quantity:2.0 Uom:EA	No Bid NB
	Totals: \$ Vendor Gross Total: \$ Vendor Discount: \$ Vendor Net Total: \$ Preference Discount: \$ Evaluation Total: \$ Vendor Freight: \$ Awarded:	\$750.00 \$0.00 \$750.00 \$0.00 ** \$750.00 \$0.00 \$750.00
	Eval Codes:	NI
	Prf Codes:	

Evaluation Code Descriptions:
** = Low Item Price
NB = No Bid
NI = Did Not Bid All Items

Create PO Print

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 63

Once your award recommendation has been approved, from the Summary tab of the Bid Tab you are able to create the resulting in-progress (draft) PO(s) by clicking the **Create PO** button on the bottom of the screen. Again, this step is necessary to facilitate the protest period because until a PO has been created from the Bid Tab for all items (except any that may have been canceled during the evaluation process), vendors cannot see the Bid tab, which is their basis for potential protests. Print and attach the Bid Tab and necessary information to a document in ADPICS and submit it for any external approvals (Ad Board, Civil Service Commission, etc.) at this time so that the protest period and their review of the award recommendation begin simultaneously.

Bid 00000007 - Purchase Order Creation Preview

1 purchase order will be created for the following quote:

Quote #	Vendor ID	Vendor Name	Total Awarded
00000002	00000011	Rao Trading and Holding	\$790.00

Purchase order creation options:

- Include Narrative Items
- Include Bid Attachments
- Include Bid Tab Attachments
- Include Bid Notes
- Include Quote Subcontractors

Click 'Continue' button to create PO or click 'Cancel & Exit' button to cancel the PO creation and return to the bid tabulation summary page.

Continue Cancel & Exit

Open Market Bid 00000007 - Purchase Order(s) Created Status: 2BPO - Bid to PO

The following Purchase Order(s) were created:

PO #	Vendor ID	Vendor Name	Total	Date Created	Status
00000005	00000011	Rao Trading and Holding	\$790.00	03/12/2013	3PI - In Progress

OK

Periscope BuySpeed Online ©2013. Periscope Holdings, Inc. 64

Upon selecting **Create PO**, the **Purchase Order Creation Preview** screen will appear for the Bid that was awarded. A list of the vendor Quotes that were awarded will appear. A different PO will be created for each different vendor that was awarded at least one Bid item. Below, a list of **Purchase order creation options** appears. These options, when checked, will bring information from either the Bid, or the vendors' Quotes to their corresponding PO. These options are all automatically checked.

Note that you will be able to edit the resulting PO, including the PO type, as needed after you've created it, including being able to delete any of this information that is brought over from the Bid. Leave the PO in "in progress" status until all award

recommendation approvals and protest period have ended, then continue to Contracts training for information on how to finalize and ultimately, send, a fully awarded, approved, negotiated contract.

Once you're ready to create the PO(s), click the **Continue** button. Doing so will display a screen listing the POs that were created. Click a link in the **PO#** field to view that PO. Clicking **OK** at the bottom of the screen will return you to your Homepage.

Questions?