Statewide **I**ntegrated **G**overnmental **M**anagement **A**pplications

Local Entities

Reference Manual

Version 2
9/14/2017
SMW

Table of Contents

Introduction

The Local Entities Reference Manual will cover SIGMA navigation as well as the features and functionality that are available to Local Entity users. We will cover how to create: Solicitations (SO); Solicitation Responses (SR); Requests for Information (RFI); Requests for Quote (RFQ); Requests for Proposals (RFP); Evaluation (EV) documents; and Negotiation (BAFO) documents. Printing Solicitation forms is also covered at the end of this document.

1. Navigation

In this lesson, users will learn how to access SIGMA Procurement and how to move through the system. This includes how to access SIGMA Procurement, view various procurement application pages that are available and how to access the Document Catalog.

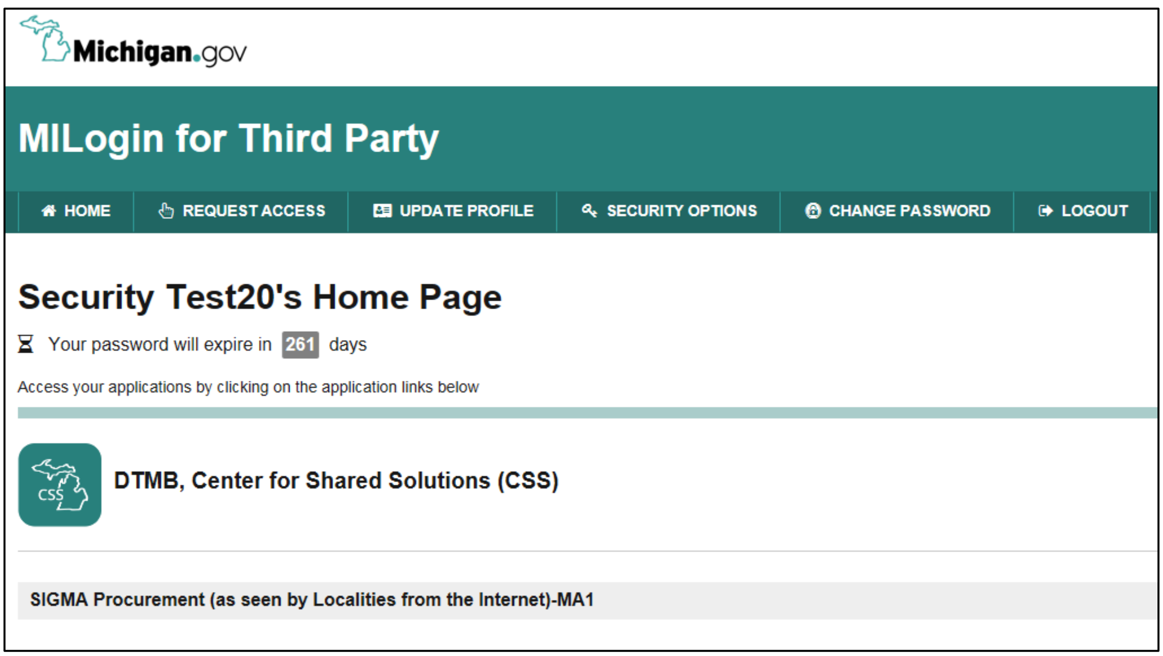
MILogin is the State of Michigan's Single Sign-on application and is used to authenticate users prior to accessing SIGMA Procurement.

To access MILogin via the internet, open a Web browser and enter https://milogintp.michigan.gov in the address field. Users will enter a User Name and Password and once they are authenticated the SIGMA Home page will display.

SIGMA Login

Figure 1 shows the MILogin Home page with a list of applications based on the user's security access.

Figure 1: MILogin – Home Page



SIGMA Procurement Home Page

To access the SIGMA Procurement application, select SIGMA Procurement in the Access your applications list. The SIGMA Procurement home page displays as shown in Figure 2.

Figure 2: SIGMA Procurement – Home Page

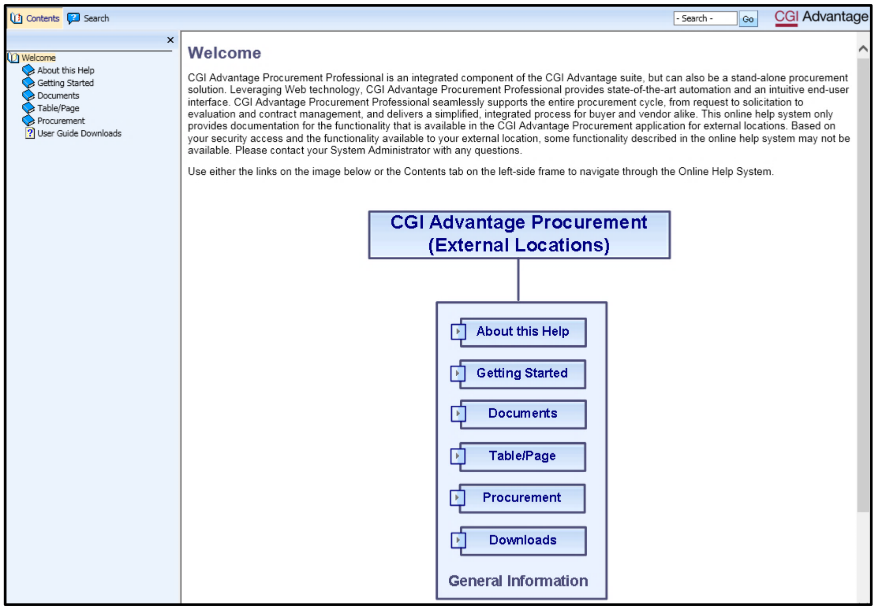
The SIGMA Procurement Home page is divided into three main parts: the Center Panel, the Primary Navigation Panel, and the Secondary Navigation Panel.

- The **Center Panel** is the large center area of the Home page. When opening a document, inquiry or reference table, it displays the fields and data that pertain to the page currently being viewed.
- The **Primary Navigation Panel** in Figure 3 is displayed along the top right of the Home page and contains icons and links for Home, Accessibility, App Help, About, and the Logout. It is static and remains the same, regardless of the page currently being viewed.
- The **Secondary Navigation Panel** in Figure 2 above is displayed along the left side of the Home page. Select all of the **expand/collapse** + icons to expand all of the menu options in this panel. Each of these sections is described later in this document.

Figure 3: Primary Navigation Panel

- The **Home** link returns users to the Home Page.
- The **Accessibility** link displays the online help system in a format that is compliant with Section 508 of the Rehabilitation Act Amendments as well as World Wide Web Consortium (w3c) guidelines making Web content accessible to people with disabilities.
- The **App Help** link displays the online Help system shown in Figure 4. The information provided in the online Help system is default information from the application and does not override SOM policies.

Figure 4: App Help



The App Help icon on the Primary Navigation Panel displays the online support documentation for SIGMA in a new window.

The Online Help window has its own navigation panel on the left, which includes a Table of Contents and a Search feature shown in Figure 5. When a topic is selected from the Table of Contents, the help page will display in the Main Content Pane. Some help pages contain links to other related articles for reference.

Figure 5: Online Help – Navigation panel TOC

Select the Contents button, and then the Welcome link, to display a list of help topics. The help contents include:

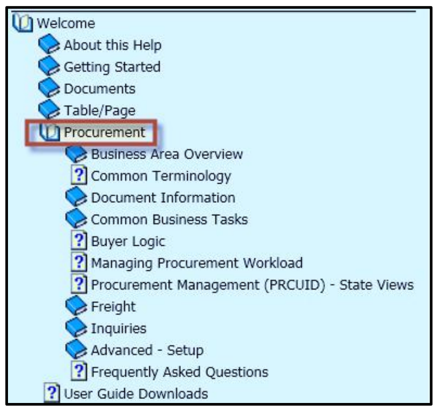
- About this Help
- Getting Started
- Documents
- Table/Page
- Procurement

- User Guide Downloads

Selecting a book topic area as pictured in Figure 6 expands and displays a list of subtopics below the topic header. The subtopic information displays in the Main Content Pane. In each topic area, the following information may be included:

- Business Area Overview
- Common Terminology
- Document Information
- Common Business Tasks

Figure 6: Online Help – Book Topic



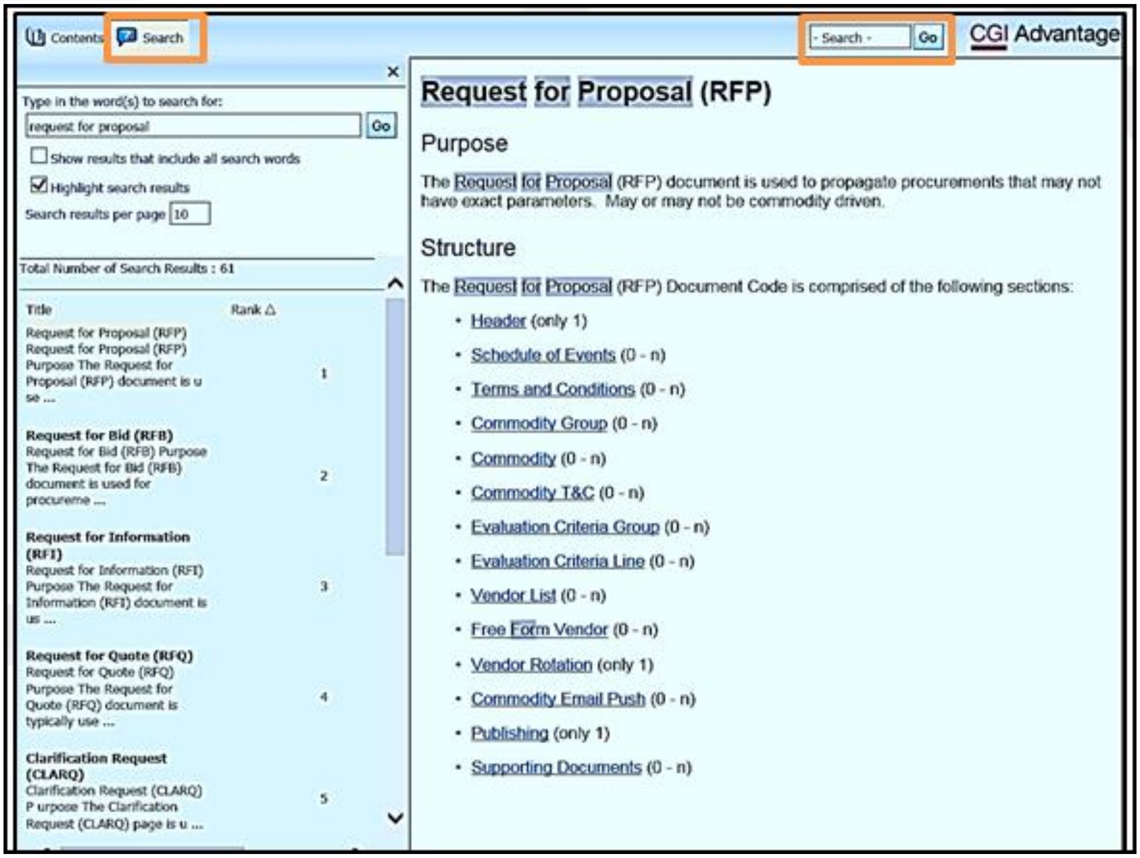
When the Search button is selected, top left of the screen, a search box displays in the left column shown in **Error! Reference source not found.**. Entering a Search term generates a list of the word(s) and heir location, in Online Help. Search options allow users to:

- Highlight the search criteria in the search results to easily identify the location of the word(s) in the text
- Specify how many search results display in the left hand column.

Selecting the result in the left column displays the corresponding page on the right Main Content Pane.

If a search term is entered in the search window at the top right of the screen and then Go button is selected, the results of the search are displayed in the left column, as in the previous method described. Selecting the result will also display the corresponding page on the right Main Content Pane.

Figure 7: Online Help - Search

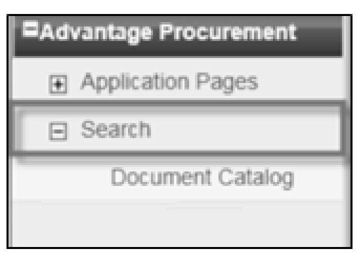


- The **About** link displays the version information of the software.
- The **Logout** icon logs the user out of the SIGMA Procurement system and securely closes the application. Always use this button to end the session.

Note: There will be some features that will not be available to Local Entities.

On the Secondary Navigation panel, select the Search link pictured in Figure 8 to expand the available functions.

Figure 8: Secondary Navigation Panel – Search Link



The Search menu provides access to the Document Catalog search function. After selecting Document Catalog this function contains fields users can enter criteria to aid in filtering the results. These search fields are optional during a search, but each field populated narrows the search results. Entering an exact value for a User ID, date, Document Code, etc. in a field limits the search results.

Search Variables such as wildcards and range characters, can be used when entering search criteria to help in locating the desired information. Commas are used to provide multiple search criteria. For example: Construction, Builders; entered in the Vendor field, will search for both construction and builders. The asterisk is a Wildcard symbol that represents one or many characters when completing a search in SIGMA Financial. For data that contains commas, enclose the search criteria with asterisks. For example, enter *Construction, Inc.* in the Vendor field.

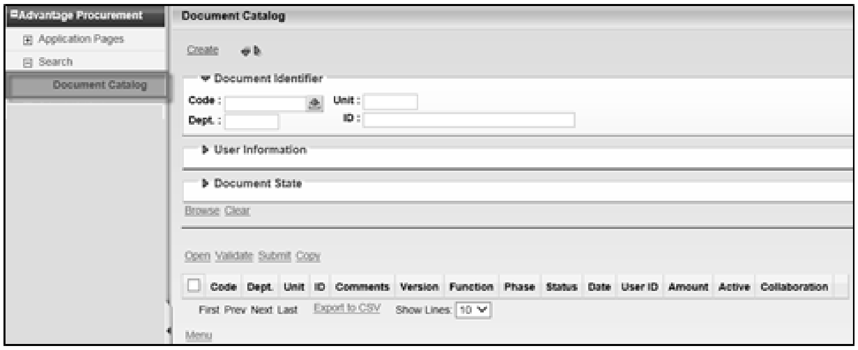
Wildcard and Range Characters can be used to narrow search results. Table 1 lists all of the Wildcard and Range Characters.

Table 1: Wildcard and Range Characters

Operand	Usage	Example
Asterisk (*)	Searches data containing a text string	If 01* is entered, returns all records that begin with 01. If *01* is entered, returns all records that contain 01 anywhere in the field. If *01 is entered, returns all records that end in 01. A search consisting of a lone asterisk and no other alphanumeric characters retrieves every record from the database. Due to the volume of data that could be returned with this feature, using a lone asterisk is not advised.
Colon (:)	Indicates a date range in search criteria related to date fields	Enter 7/1/2016: 7/15/2016 in the Create Date field in the Document Catalog to view all documents created on or after 7/1/2016 and on or before 7/15/2016.
Greater than >	Indicates greater than a numeric value or date, respectively	Enter >7/14/2016 in the Create Date field in the Document Catalog to view all documents created after 7/14/2016.
Greater than or Equal to >=	Indicates greater than or equal to a numeric value or date, respectively	Enter >=7/14/2016 in the Create Date field in the Document Catalog to view all documents created on or after 7/14/2016.
Less than <	Indicates less than a numeric value or date, respectively	Enter <12/31/2016 in the Create Date field in the Document Catalog to view all documents created before 12/31/2016.
Less than or Equal to <=	Indicates less than or equal to a numeric value or date, respectively	Enter <=12/31/2016 in the Create Date field in the Document Catalog to view all documents created before or on 12/31/2016.

Select the Document Catalog link from the Secondary Navigation Panel shown in Figure 9.

Figure 9: Secondary Navigation Panel – Document Catalog

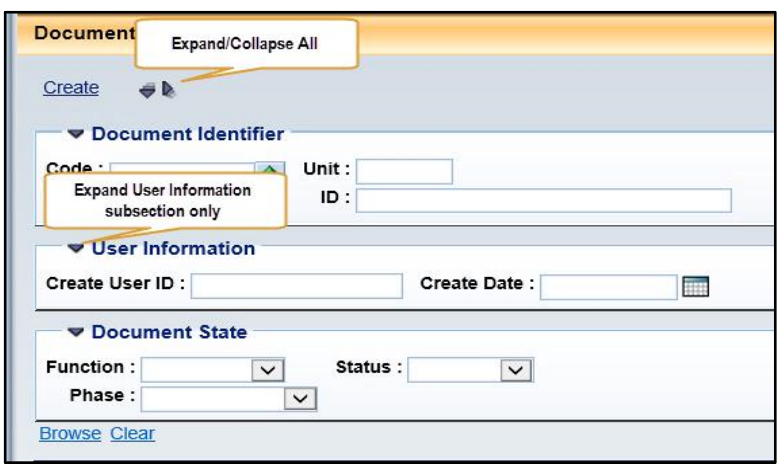


When selecting Document Catalog, subsections and field options appear in the Center Panel that allows users to search for and create new documents. Search criteria in documents can be entered in the Document Catalog from three main sub-sections:

- **Document Identifier** - specific Document Code, Dept, Unit or ID
- **User Information** - Create User ID, or Create Date
- **Document State** - Function, Phase, or Status of the document

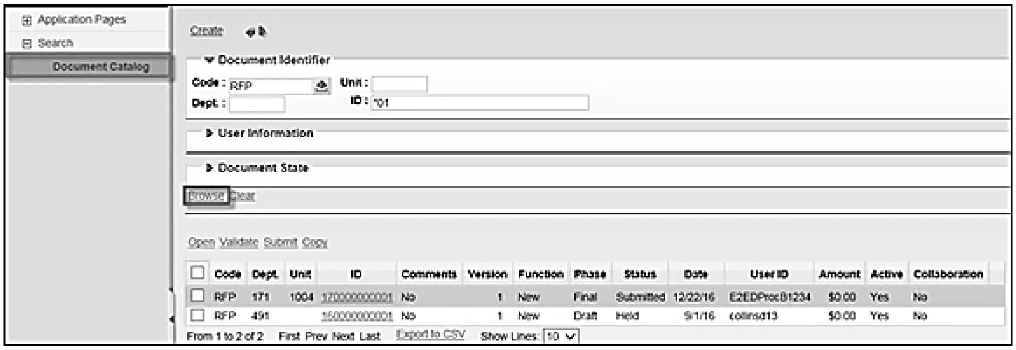
To view the search criteria fields in the subsections that are collapsed (for example User Information), Select the subsection Expand/Collapse icons next to the subsection titles, or Select the Expand All or Collapse All icons pictured in Figure 10.

Figure 10: Document Catalog – Collapse/Expand All Features



After entering search criteria, select Browse as shown in Figure 11 to display the results in the grid at the bottom of the page.

Figure 11: Document Catalog - Browse



Users can create a new document from the Document Catalog by Selecting the Create link at the top of the page. Enter information in the following areas:

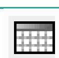
- **Document Identifier** - Enter the specific document Code, Dept, Unit, and ID (not required if using Auto Numbering)
- **Other Options** - Select the checkbox for Auto Numbering (if the document allows SIGMA to assign the document ID number) or Create Template (if the document is a template for future documents)

After the document information is entered, select the Create link to open the new document in Draft phase.

Navigation Features

SIGMA Procurement pages display in the Main Content pane. These pages contain various options, buttons, fields, and links used to interact with the system. Understanding these features assist in performing tasks efficiently and accurately. Table 2 lists commonly used navigation features.

Table 2: Navigation Features Tools

Navigation Feature	Description
Action Menu 	A menu of available actions that can be performed on that page.
Auto Complete	Automatically predicts the remaining characters in a word or phrase based on what has been entered.
Calendar Tool 	Select dates or date ranges from an interactive calendar.
Check Box 	Indicate whether the condition is on (Selected) or off (Deselected).
Close Window 	Located at the top right corner of a window and closes the window when selected.

Navigation Feature	Description
Document Menu	A menu of available commands that can be performed on the document or using the document.
Dropdown List	A list of items available for selection.
Expand All/Collapse All	Selecting the downward arrow expands all collapsed sections on the Page. Selecting the sideways arrow collapses all expanded sections on the Page.
Maximize and Restore Toggle	Located at the top right corner of a window. Selecting the Maximize button expands the window to fill the screen. The button toggles to the Restore Down button. When selecting the Restore Down button, the window returns to its original size.
Minimize	Located at the top right corner of a window. Closes the window and an icon is placed in the Task Bar on the Desktop. To re-open the minimized window, select the icon in the Task Bar.
Navigation Links/Buttons First Previous Next Last	Used to view additional lines when the maximum number of lines exceeds more than one page. When the links are underlined or the buttons are enabled. Use these navigation links to page through the additional records.
Pick List	Displays a page to provide a pick list of items to search and select.
Quick Switch	Located in the summary bar of documents with more than one commodity line. When selected, the Quick Select Row page displays, allowing the user to select another row in the document.

Right-Select Commands

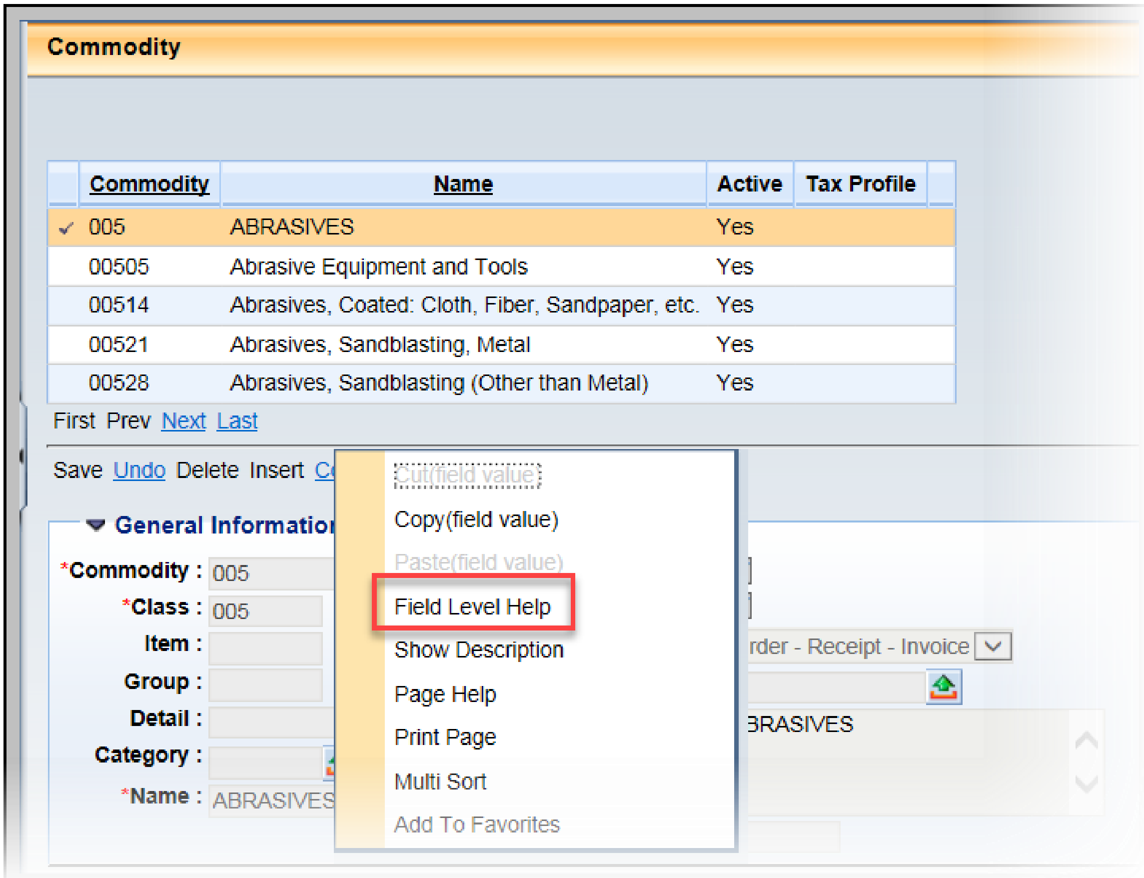
Whether users are in documents or tables, there are additional features and functionality available by right Selecting the mouse. A dropdown list displays with the commands below:

- Field Level Help
- Show Description
- Page Help
- Print Page
- Multi Sort
- Add to Favorites – this option is not available in this application

Field Level Help

Field Level Help in Figure 12 provides information about the field. Position the cursor directly over the field and right click (select) with the mouse. Select Field Level Help from the menu; the field definition displays in a new pop-up window. To close the field help, select the icon.

Figure 12: Field Level Help



Page Help

Page Help describes the SIGMA page. Position the cursor anywhere on the page and right-click (select). Select Page Help from the menu, the page description displays in a new pop-up window. To close the page help, select the close icon in the top corner of the pop-up window.

Print Page

Print Page displays a Print window to select a printer. The entire page prints, rather than what is currently visible on the screen.

Multi Sort

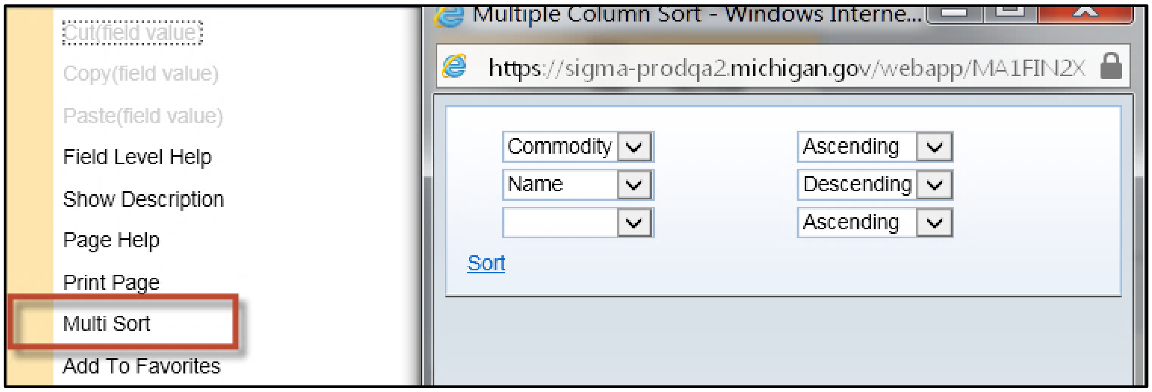
Multi Sort performs a sort on multiple columns. Multi Sort sorts all underlined column headings in the grid by the selected column. Selecting the same column header more than once, changes the sort mode between Ascending and Descending. Multi Sort functionality is only available when more than one column heading is underlined. See the sample Multi Sort in Figure 13.

To sort the table by multiple column headings follow these steps:

1. Right-click (Select) the page. A menu displays.

2. Select **Multi Sort** from the menu. The Multiple Column Sort window displays.
3. Select up to three sorting criteria from the dropdown lists.
4. Select **Ascending** or **Descending** order for each column.
5. Select **Sort**.

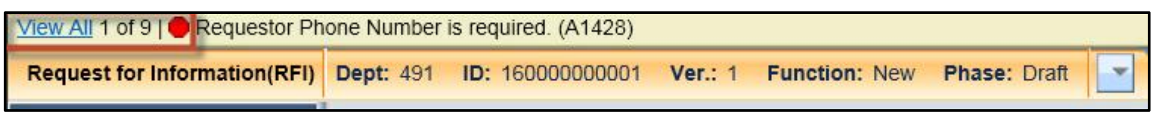
Figure 13: Multi Sort



2. Document Errors

Selecting Validate or Submit performs a series of edit checks on the document. If it encounters any errors, it displays a brief error message at the top of the page. If SIGMA finds more than one error, the first error message is displayed along with the total number of errors as shown in Figure 14. For example, a “1 of 9” indicates that there are a total of nine error messages and the first one is displayed. Select View All to view all of the error messages.

Figure 14: Error Message



Error messages with the following severity levels and meanings can be raised during document processing:

- **Informational** - Informational messages, as the name suggests, are for informational purposes only and do not affect the determination of whether a document will be accepted to the next phase. All informational messages that occur during document processing are accumulated so the user can see all of the informational messages for that document version at one time.
- **Warning** - When warning messages are encountered, they are compared with the warning message from a previous validate or submit action. If there are any new warnings since the last time, the user is given the chance to review these warnings before the document is accepted to the next phase. The next time the document is submitted, the document is accepted to the next phase if there are no new warnings. All warning messages that occur during document

processing are accumulated so the user can see all of the warning messages for that document version at one time.

- **Error** – When error messages are encountered, the document is rejected and any updates or changes made outside of the document are not committed to the database. All error messages that occur during document processing are accumulated so the user can see all of the error messages for that document version at one time. In addition, the phase of the document remains at the Draft phase until the user fixes the document and validates or submits the document again.
- **Severe** - When severe messages are encountered during the processing of a document, the processing is terminated immediately at that point and control is returned back to the user. All updates or changes made to the document and made outside of the document are not committed to the database. Only the messages that occurred before the severe message and the severe message itself are displayed to the user for review.

3. Application Pages

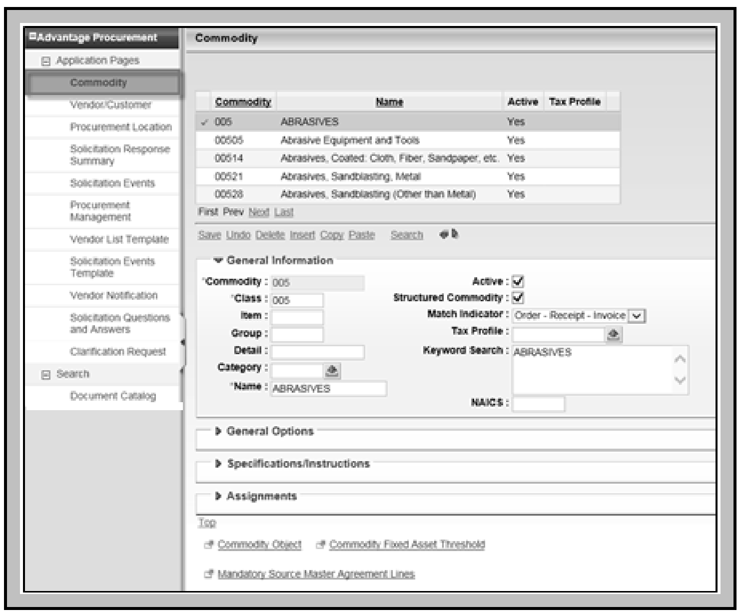
The Application Pages described in this section are available to Local Entity users from the Secondary Navigation Panel in a read only mode. Based on the security roles assigned to Local Entities, edits or changes to the content shown in these pages will not be allowed. These are provided to help users better understand the content within these pages as they create the procurement documents explained in this Reference Manual.

Commodity

The Commodity page, Figure 15, shows the current defined commodity codes. Commodity codes categorize, identify, and track purchases and consumption information.

The Commodity table includes Class, Item, Group and Detail fields that leverage the NIGP (National Institute of Government Procurement) structure. The State of Michigan has structured most commodity codes in SIGMA to be within 3-5 digits, except in cases for inventory or custom codes, which can be 7 digits long. In addition, the State of Michigan has created some custom codes that are not part of the NIGP structure.

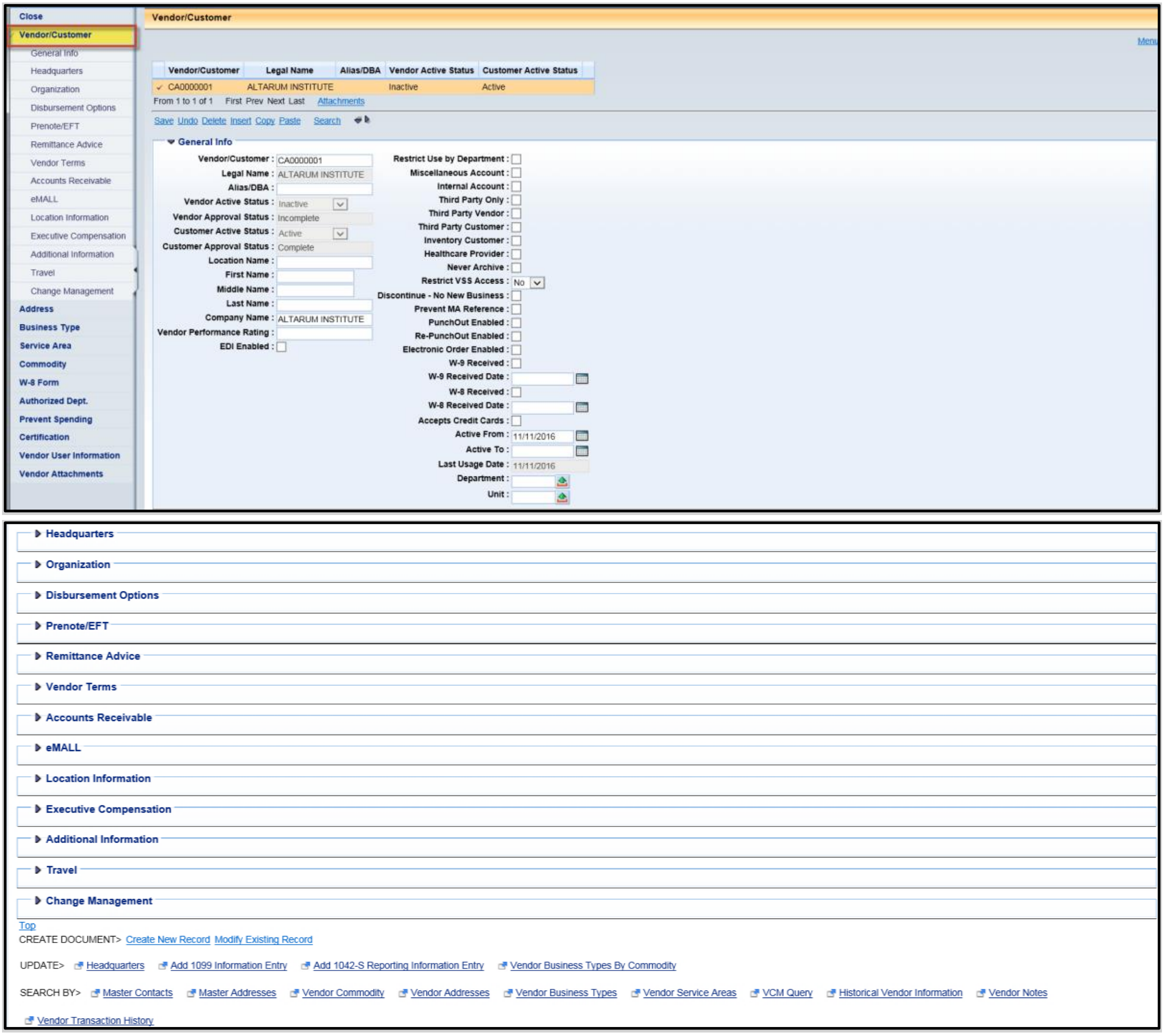
Figure 15: Application Pages – Commodity



Vendor/Customer

The Vendor/Customer table, Figure 16, displays the primary information about a Vendor/Customer like Legal Name, Vendor/Customer number, address, etc. The Active Status is also shown in this table and is important because the Active Status of a Vendor/Customer record controls the use of that Vendor/Customer on solicitations. Vendor/Customer sensitive data will be not visible to Local Entities.

Figure 16: Application Pages – Vendor/Customer



Procurement Location

Procurement Location is listed but users will not have access to this page and will receive an error message when selecting it from the panel.

Solicitation Response

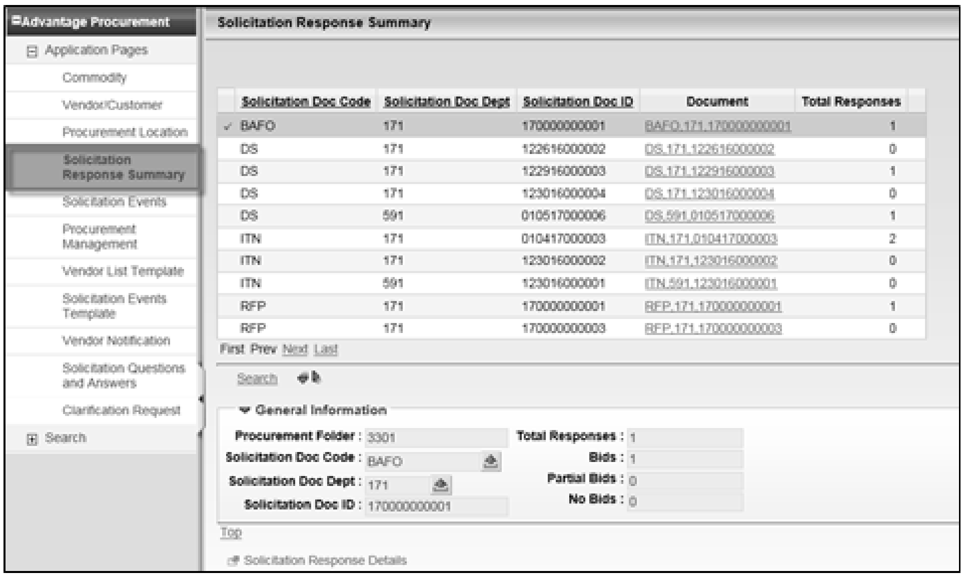
The Solicitation Response Summary page, shown in Figure 17, displays a current general summary of the Solicitation Response (SR) documents submitted for a given Solicitation (SO), even while the Solicitation is still open. This allows a Buyer or other authorized Procurement users to get an up-to-date summary of the overall SR and bidding activity for an open Solicitation.

The Solicitation Response Summary displays the number of Solicitation Responses received to date for a Solicitation and is broken down by: Total Responses, Bids, Partial Bids, and No Bids. Search this page by SO Document Code, SO Document Department, SO Document ID and Procurement Folder ID.

- The minimal search criterion is an SO Document Code.
- Total Responses is the total number of submitted SR documents for the Solicitation.
- Bids and No Bids are set to the number of SR documents that have all of the Commodity Lines set to the same Response Type value, Bid or No Bid, respectively. Partial Bids is set to the number of SR documents that have different Response Type values set for the Commodity lines.

  The Document column in the grid on the Solicitation Response Summary page contains a hyperlink that transitions the user to the Solicitation document.

Figure 17: Solicitation Response Summary



Solicitation Events

The Solicitation Events page shown in Figure 18, displays a list of events, which would take place once a Solicitation is initiated.

The records on this table are used on the Solicitation documents to schedule the events. The Solicitation Events records are also used on the Solicitation Events Template table.

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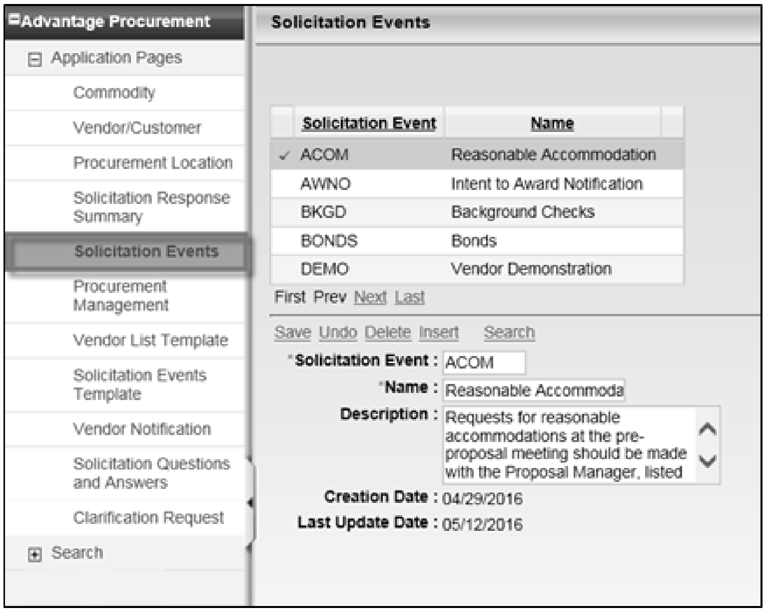
The records on this table are used on the Solicitation documents to schedule the events. The Solicitation Events records are also used on the Solicitation Events Template table.

Figure 18: Application Pages – Solicitation Events



Procurement Management

The Procurement Management page shown in Figure, allows the user to search for a Procurement Folder and is the central location for both Buyers and Managers to work with Procurement Folders. The following sections are displayed on the Procurement Management page:

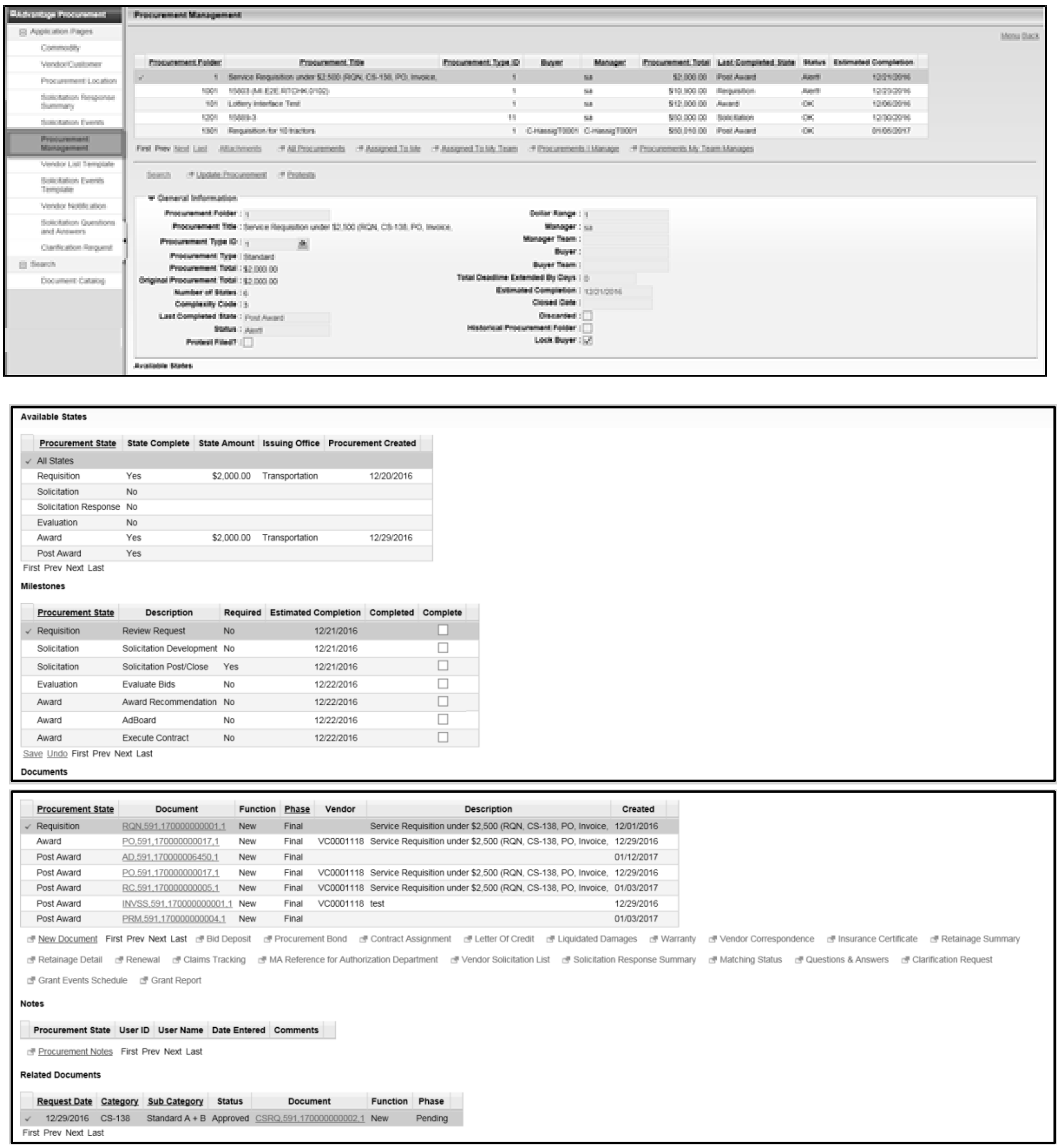
- **General Information** – displays information about the Procurement Folder such as the Procurement Folder Number, Procurement Title, Procurement Type, Procurement Amount (current amount) and Original Total Procurement Amount, Number of States, Complexity, Last Completed State, Status, and Dollar Range along with deadline extension days, Estimated Completion Date and so forth. It also displays the inferred Manager, Manager Team, Buyer, Team, and if any protest has been filed for the Procurement folder.

- **Available States** – the default Available State view when the Procurement Management page opens is the *All States view*. This allows users to see the information on the Milestones, Documents, and Notes for all the procurement states for the selected procurement. Once a Procurement Folder is selected from the upper grid on the Procurement Management page, a user can transition between State Views from the Available States section to view and update the Milestones, Documents and Notes for each Procurement State. The available states grid displays the Status, State Amount, and Issuing Office. The Procurement Created field displays the date the state was created.

- **Milestones** – This section allows a buyer to check off completed milestones or to view future milestones within a particular Available State view. The Milestones displayed are determined by the Procurement Type. An Available State is deemed completed when all required milestones have been completed and all documents within the State are Final. The Milestones do not have to be completed in order, that is, milestones in a future State can be completed before all of the Milestones in a previous state have been completed. The use of Milestones is optional.

- **Documents** – This section shows all of the documents that have been created in the Procurement Folder for the specified Available State. The user can access and review details of the documents by selecting the document information hyperlink.
- **Notes** - The Notes section displays the notes associated with the procurement folder allowing users to enter information specific to this state of the procurement. The notes section is similar to a journal of information about what happened in the Available States for the procurement.

Figure 19: Application Pages – Procurement Management

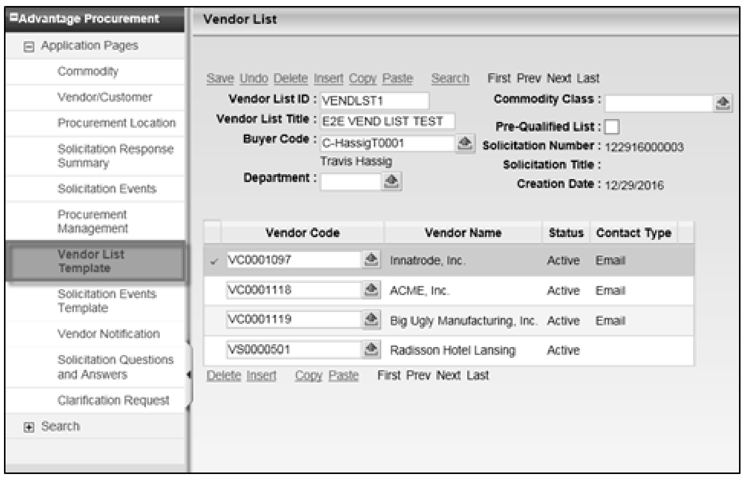


Vendor List Template

The Vendor List Template page, shown in Figure, lists the available vendor templates for use on Solicitations. Templates include a group of vendors that have something in common. Templates can be stored by Commodity Class, Buyer, and/or Department.

Templates allow procurement officials to quickly create a list of vendors to be solicited for a business opportunity.

Figure 20: Application Pages – Vendor List Template

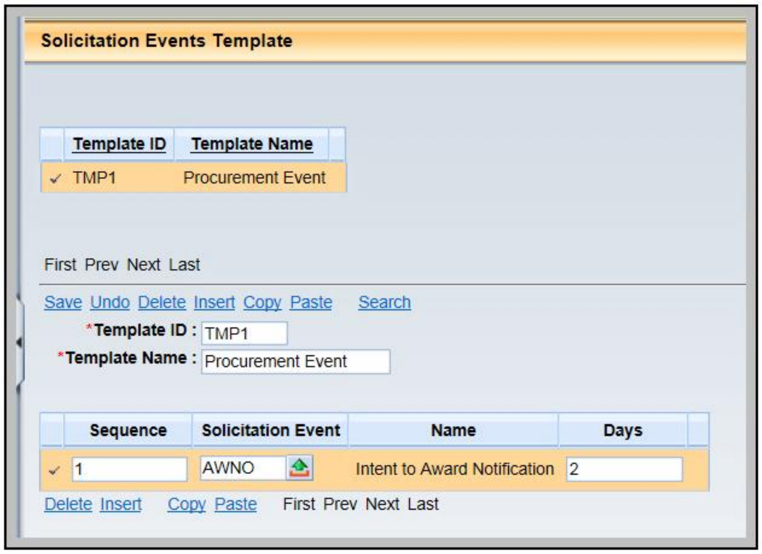


Solicitation Events Template

The Solicitation Events Template page, shown in Figure 21, lists the templates that are available for the Solicitation documents. These are groups of individual Solicitation Events to allow for ease of use on the Solicitation. Local Entity users will be able to select existing templates but will not be able to create new ones.

It is recommended that instead of using templates the Solicitation Events section of the Solicitation document is used by selecting the CUSTOM Event and modifying the name of the event as desired. Additional detail about Solicitation Events is below in the Creating Solicitations section of this document.

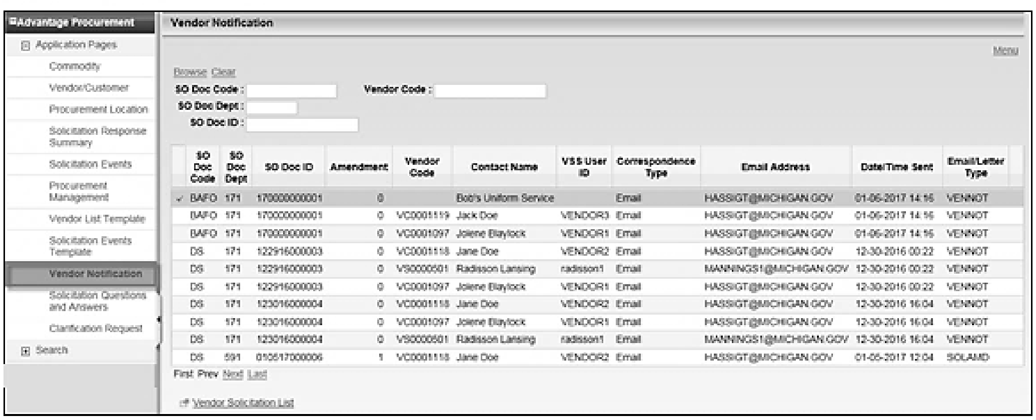
Figure 21: Application Pages – Solicitation Events Template



Vendor Notification

The Vendor Notification page shown in Figure 22, provides an audit trail view of all notifications that have been sent to vendors in reference to a solicitation. The referencing solicitation; correspondence type; and the date and time that the notification was sent, can be viewed from this page. Users can search for a specific notification by entering search criteria in the fields at the top of this page and then selecting the Browse link.

Figure 22: Application Pages – Vendor Notification



4. Creating Solicitations

Request for Quote (RFQ)

Vendor Self Service (VSS) is a web based application that allows vendors to create a Vendor/Customer (VCUST) record online, maintain their account information, view and respond to business opportunities, view their financial transactions, and enter their invoices. Vendors register in one place for State payments, Procurement, and Grant Opportunities and Grant Applications; this includes vendors from all agencies. VSS is the application where solicitations that are created by Local Entities (RFQ's, RFI's and RFP's as examples) will be posted and where vendors will bid on them. VSS is synchronized with SIGMA Procurement daily on a two hour cycle starting at 8 a.m. and ending at 4 p.m.

A Request for Quote (RFQ) document is an informal process used to determine fair and reasonable pricing for the purchase of a good or service. Users can enter additional information on the RFQ such as Schedule of Events, Terms and Conditions, and Publishing information.

Unless the Buyer flags the solicitation not to be imported to SIGMA Vendor Self Service (VSS), once the RFQ document is approved and submitted to Final, it is imported into VSS, once the next VSS Synch Cycle has completed, and an email notification is sent to vendors notifying them of the available opportunity.

If a solicitation needs to be changed or withdrawn after it has been entered and vendors have been notified, a modification or cancellation can be processed for the original RFQ.

Previously published solicitations may require modification because of changes to the solicitation, such as an extension of the due date.

To make a change to a solicitation, process a modification to the original document. The process for modifying a solicitation is the same regardless of the solicitation document. To amend a solicitation:

1. Locate and open the solicitation to be amended using the Document Catalog or the Procurement Management page.

   Click Edit. Notice that a new version of the solicitation is created in Draft phase.

2. Make any necessary changes to the solicitation.
3. Validate and submit the solicitation.

Once the modification or cancellation is approved and submitted to Final, it is imported into VSS when the next VSS Synch Cycle has completed and an email notification is sent to vendors notifying them of the change or withdrawal of the solicitation. This notification is created by a batch job that is automatically run every two hours starting at 8am and ending at 4pm.

The RFQ document has a Header and thirteen detail sections, which are described below.

Note: This manual is intended to highlight the significant fields on each section of the document, not to provide an exhaustive description of every field. The Field Help functionality can be used to view the description of fields not covered explicitly in this manual.

RFQ Document – Header Section

The Header section of the RFQ is used to record general information describing the procurement and to set options and controls related to VSS. The RFQ Header section has seven tabs.

General Information Tab

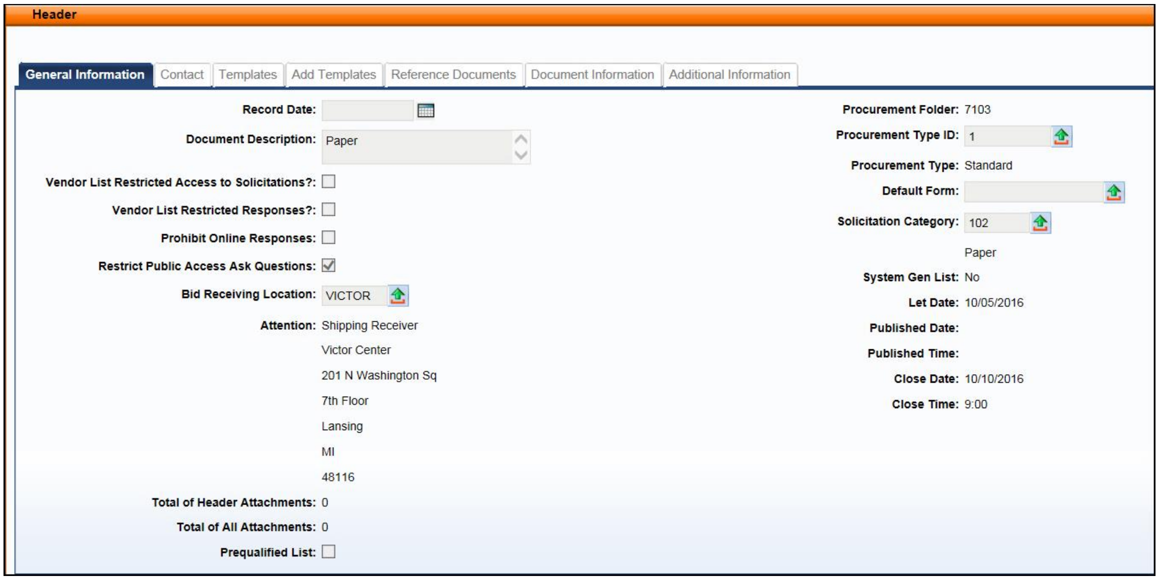
Use the General Information tab to set several options and controls for the solicitation related to VSS as shown in Figure 23:

- **Vendor List Restricted Access to Solicitations? Checkbox** – select this checkbox to indicate only the vendors on the vendor list will receive notification and be able to respond to the Solicitation (SO).
- **Vendor List Restricted Responses? Checkbox** – select this checkbox to indicate only vendors listed in this SO are allowed to respond to this solicitation. Vendors not selected will get a notification and can see the SO but they will not be able bid on it.

Note: If neither Vendor List Restricted Access to Solicitation nor Vendor List Restricted is checked, all vendors registered for the commodities on the SO AND the vendors on the vendor list will receive notification and can bid.

- **Prohibit Online Responses Checkbox** – select this checkbox to indicate online responses to the solicitation via VSS are not allowed for this solicitation.
- **Restrict Public Access Ask Questions Checkbox** – select this check box to indicate questions regarding the solicitation via VSS are restricted to registered VSS users.

Figure 23: RFQ – Header Section – General Information Tab



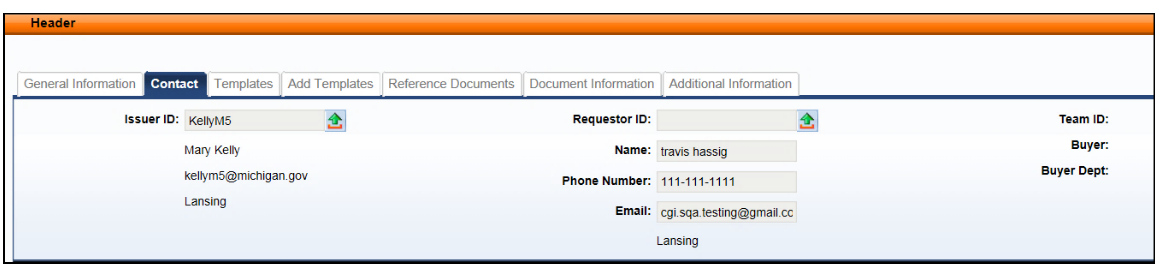
Contact Tab

Enter an Issuer ID and Requester ID for this solicitation as shown in

Figure 24. The Issuer ID defaults based on the User ID of the user who creates the solicitation but this field can be edited.

Note: The Requestor ID and the Issuer ID can be the same. The Requestor ID is also not required and the user can manually enter the Name, Phone Number and Email of the Requestor if needed.

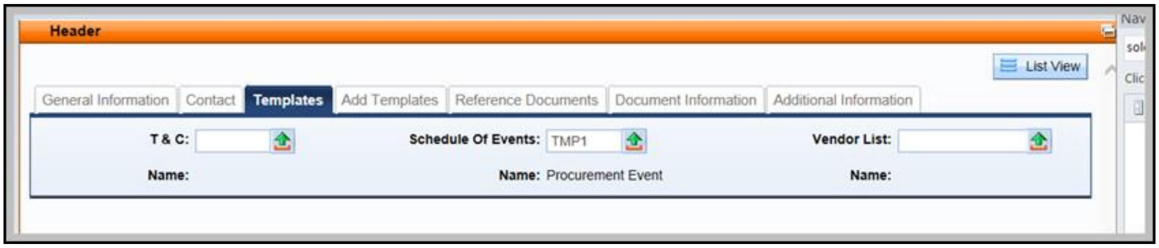
Figure 24: RFQ – Header Section – Contact Tab



Templates Tab

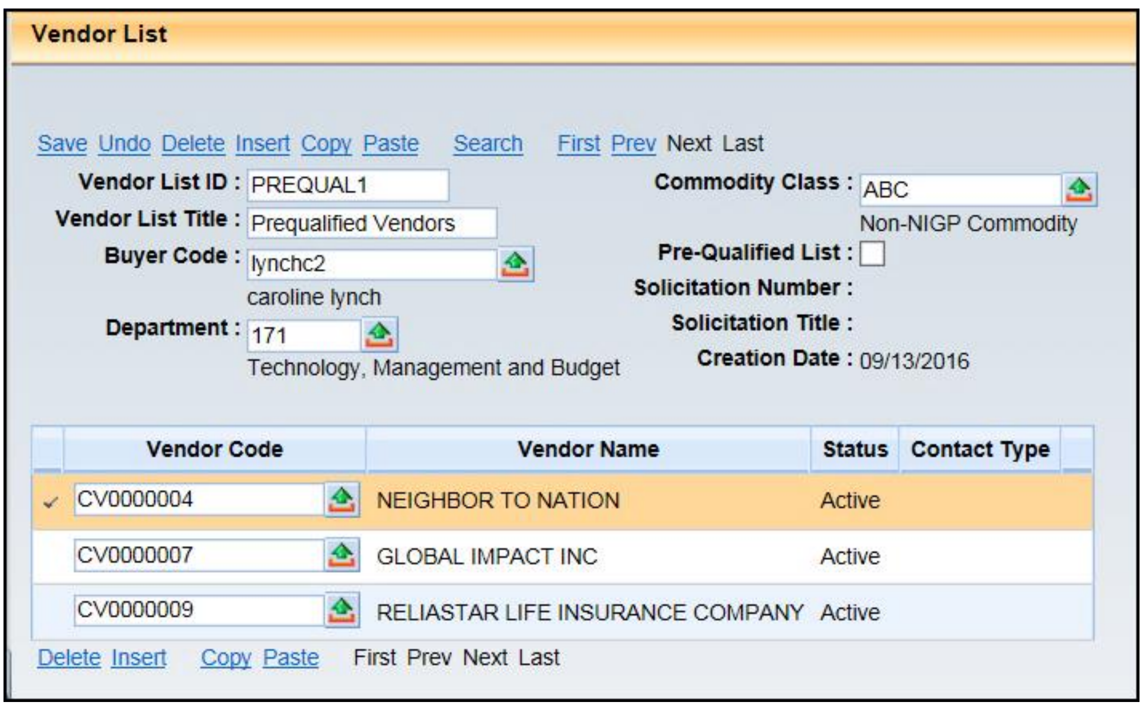
Three types of templates are used on the RFQ Header Section, Templates Tab, seen in Figure 25.

Figure 25: RFQ Header Section - Templates Tab



- **Terms and Conditions (T & C)** – These are predefined groups of individual T&C records from the Terms and Conditions page. Terms and Conditions Templates allow users to select a group of Terms and Conditions that are used frequently without having to re-enter them each time. A T&C titled ATTACH is defined in SIGMA – See Attached that will be used to attach custom T&C to the document.
- **Schedule of Events** – These are predefined groups of individual Solicitation Events from the Solicitation Events page. Schedule of Events Templates allow users to select a group of Solicitation Events that are used frequently without having to re-enter them each time. A Solicitation Event titled CUSTOM is defined for users to modify and create their own.
- **Vendor List** – Predefined group of vendors that have something in common. Templates are stored by Commodity Class, Buyer, and/or Department, which allow for a list of vendors to be solicited for a business opportunity. To view the individual vendors that make up a particular vendor list, use the Vendor List Template page shown in Figure 26.

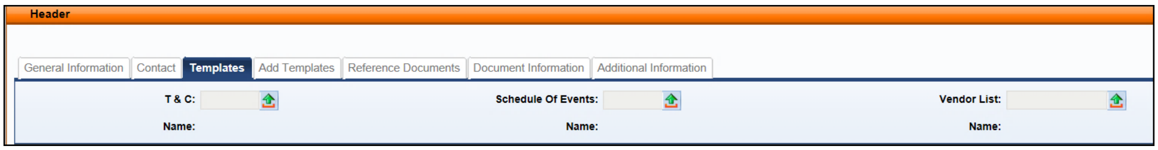
Figure 26: Vendor List Template Page



Each template is identified by a template code.   Figure 27 shows the Templates tab. Using a template allows users to populate a predefined list of the T & C, events, or vendors on the RFQ. Once the code is entered in the template field, select the Load button at the bottom of the page.

For example, to use a Schedule of Events template, users can select the correct template code from the Schedule of Events pick list and Select the Load Schedule of Events button to populate the RFQ with the events from the selected template.

Figure 27: RFQ – Header Section – Templates Tab

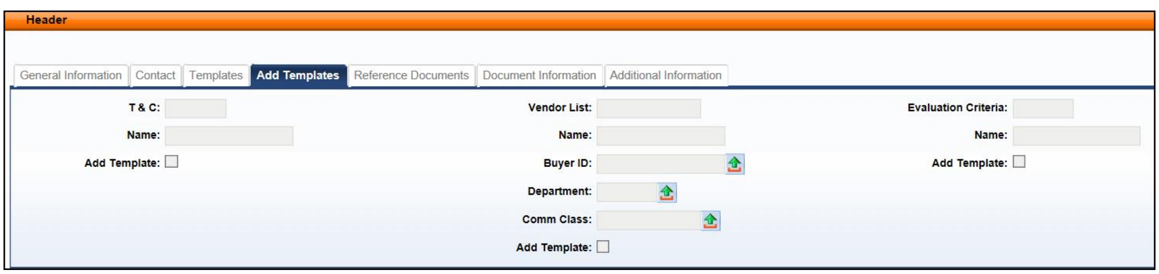


Add Templates Tab

Use the Add Templates Tab, shown in Figure 28, to view a template from the list of T & C or Vendors entered on the RFQ. This can be used, for example, in the case where the set of individual T & C entered on the RFQ will be used on subsequent solicitations. By using a defined template, this set of T & C can be populated on another solicitation by entering the template code for the T & C template rather than entering all of the T & C individually.

Note: Local Entities will not be able to create their own templates; but can utilize existing templates.

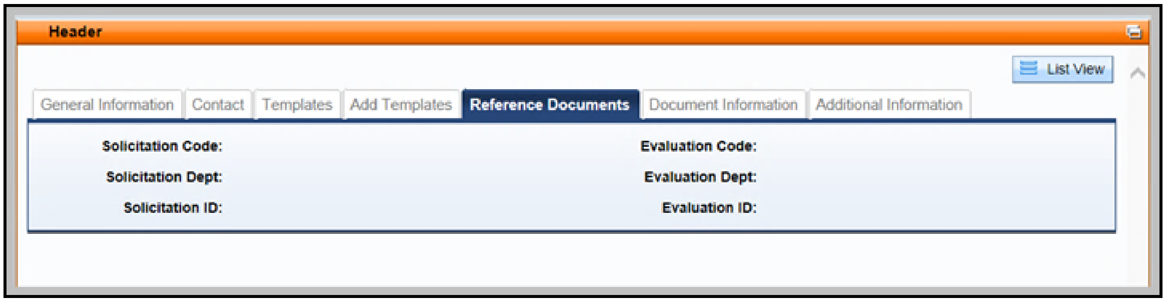
Figure 28: RFQ – Header Section – Add Templates Tab



Reference Documents Tab

The Reference Documents Tab, Figure 29, displays the Document IDs of any solicitation or Evaluation (EV) documents that reference this RFQ.

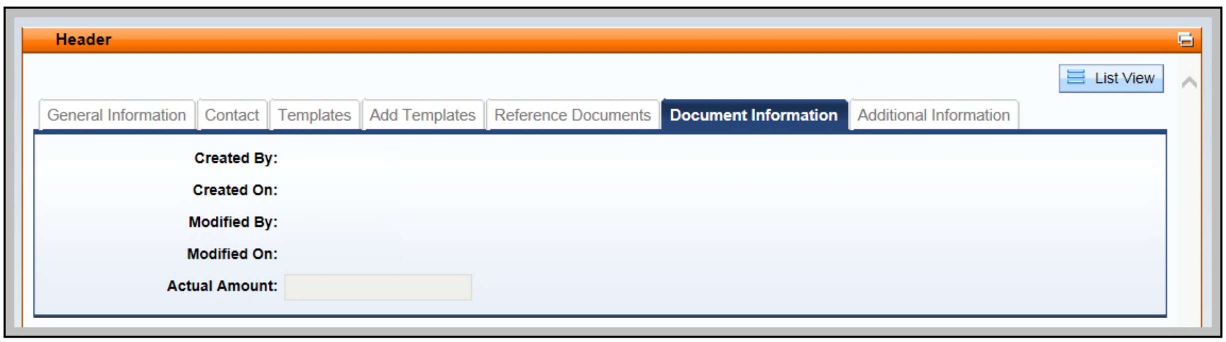
Figure 29: RFQ – Header Section – Reference Documents Tab



Document Information Tab

The Document Information Tab, Figure 30, displays the user who created and last modified the RFQ as well as the actual dollar amount of the solicitation.

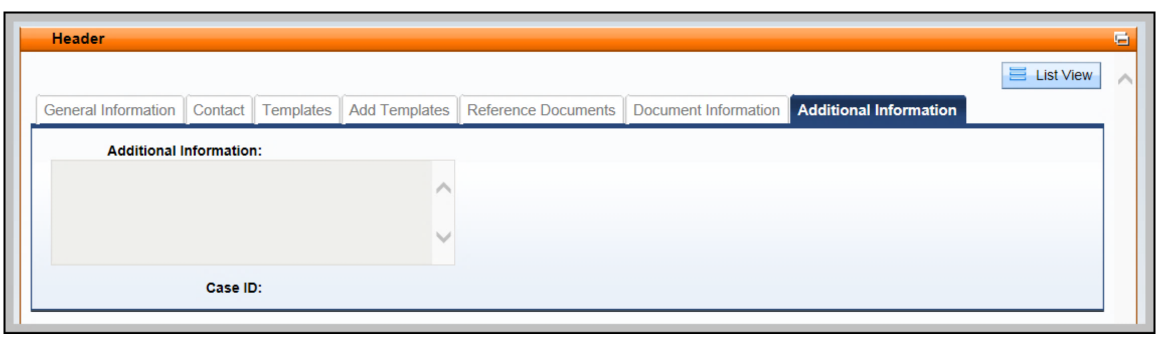
Figure 30: RFQ – Header Section – Document Information Tab



Additional Information Tab

The Additional Information Tab, Figure 31, provides an Additional Information field where users can enter any additional free form comments about the solicitation.

Figure 31: RFQ – Header Section – Additional Information Tab



RFQ Document - Schedule of Events Section

The Schedule of Events section shown in Figure 32 is used to define a schedule of relevant events published on the solicitation document and on VSS.

Figure 32: RFQ Document – Schedule of Events Section

Users can enter events individually using the Event Code pick list and by populating the relevant Sequence, Days and Event Date. Events can also be prepopulated using the Schedule of Events template entered on the Header of the RFQ. Once the events are populated, users will enter the Event Date for the first event and Select the Populate Event Dates button at the bottom of the page. This populates the Event Dates for all subsequent events based on the Sequence and Days fields.

Note: Buyers can select the CUSTOM Solicitation Event and give it a custom name.

Examples of solicitation events are detailed below in Table 3.

Table 3: Solicitation Events

Event Code	Event Title	Event Description
QDUE	Questions Due	Only written questions will be accepted and due 5 days prior to the solicitation close date.
RDUE	Responses Due	Responses to submitted questions will be posted 2 days prior to the solicitation close date.
PRMT	Pre-proposal Meeting	The purpose of the pre-proposal meeting is to discuss the RFP and the work to be performed and may include an inspection of the facility. Discussions, including answers given by the State at the pre-proposal meeting are not official. Pre-proposal meeting is scheduled for 5 days prior to the solicitation closing date.
ACOM	Reasonable Accommodation	Requests for reasonable accommodations at the pre-proposal meeting should be made with the Proposal Manager and listed in the solicitation at least 3 business days before the date of the meeting. Any requests received outside this period cannot be guaranteed.

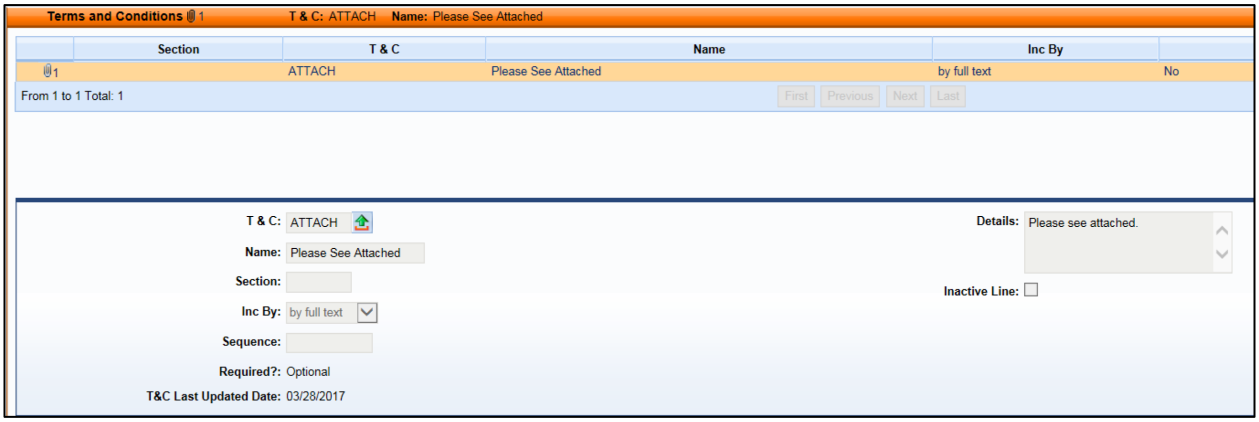
Event Code	Event Title	Event Description
SMPL	Samples	The bidder must submit samples of work that are identical to the proposed Contract Activities. Samples must be clearly labeled with the bidder's name and bid number and sent to the address listed on this solicitation. Samples not destroyed in testing will be returned at the bidder's expense, if requested. Samples must be received 5 days prior to the solicitation close date.
DEMO	Vendor Demonstration	Vendor will be expected to demonstrate/present their product to State of Michigan users. Presentations will be scheduled 10 days after the solicitation closing date.
AWNO	Intent to Award Notification	Intent to Award notification is estimated to be issued 10 days after the solicitation closing date.
BKGD	Background Checks for Contractor Personnel	The State requests that background checks be completed by all Contractors prior to a solicitation closing date. The background checks can vary, but at a minimum, typically include a review of credit history, references and criminal records in accordance with applicable laws. The State provides instructions on which background checks specifically must be completed at the sole expense of the Contractor.
TEST	Acceptance Test Demonstration	Acceptance Test demonstration will be conducted to ensure the Software Deliverable, including all Software and Documentation, conforms to the requirements of this Contract, including the applicable Specifications and, in the case of the Software, the Documentation. The Acceptance Test demonstrations will be scheduled on the date specified.

RFQ Document - Terms and Conditions Section

In the Terms and Conditions section shown in Figure 33, users can add individual predefined standard terms and conditions to the RFQ using the pick list for the T & C field. T&C’s can also be added as an attachment to the document.

Terms and conditions are posted on VSS as a part of the solicitation.

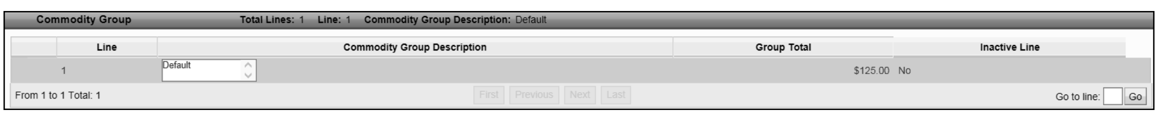
Figure 33: RFQ Document – Terms and Conditions Section



RFQ Document - Commodity Group Section

The Commodity Group section shown in Figure 34 is used to categorize commodity lines. This section may later be used to award grouped lines rather than awarding lines individually. For example, a solicitation for a construction project may contain many lines for building materials, which will be awarded to a single vendor. Putting these building materials commodity lines in a single commodity group allows the user to award the lines as a group to the vendor rather than having to award individual lines to the same vendor.

Figure 34: RFQ Document – Commodity Group Section



RFQ Document - Commodity Section

The Commodity section of RFQ has seven tabs.

General Information Tab

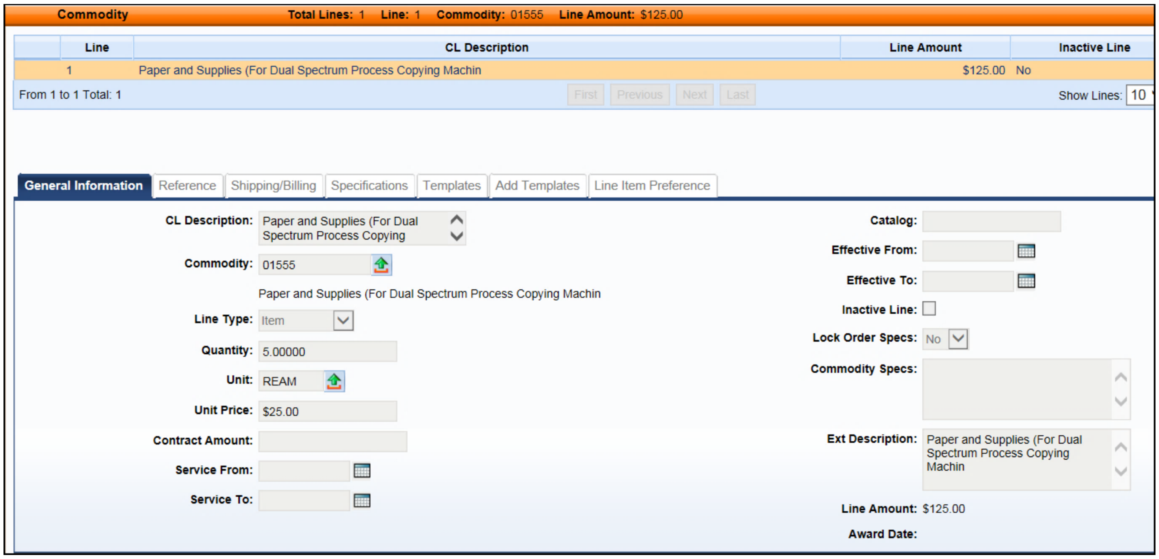
The General Information tab shown in Figure 35 is used to define individual lines included as part of the solicitation. Lines may be defined as items, service, or discount using the Line Type dropdown list.

Line Type of Discount is used to specify discounted Unit Prices if discounts need to be specified. If the Line Type = discount then the following fields will be required:

- List Price
- Discounted Unit Price

The discount line type is used when the buyer wants to define a separate discount line from the item or service being solicited.

Figure 35: RFQ Document – Commodity Section – General Information Tab



Reference

All fields on the Reference Tab will default so there will be no need for data entry on the tab.

Shipping/Billing

The Shipping and Billing Location defaults to the locations associated with the User ID of the person creating the solicitation. Users can also select a Shipping/Billing location if needed.

Specifications

Use this tab to enter optional detailed specifications about the commodity, if applicable.

Templates

If there are T & C specific to the commodity line, users can reference a predefined T & C template in this section. T & C templates entered on this section pertain only to the associated commodity line not the RFQ as a whole.

Add Templates

This tab is not being utilized.

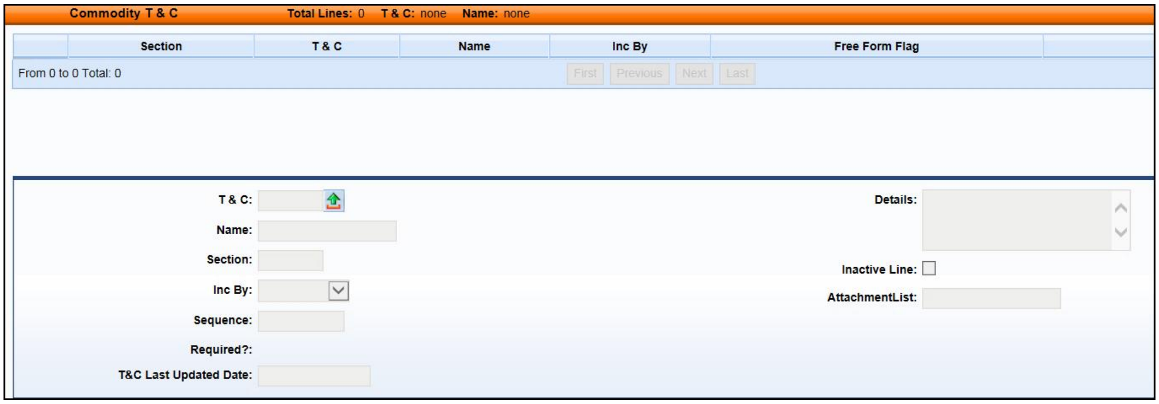
Line Item Preference

This tab is not being utilized.

RFQ Document - Commodity T & C Section

In the Commodity T & C Section, users can use the Commodity T & C section shown in Figure 36 to define individual terms and conditions that vendors must meet for a specific commodity line. Use the pick list to select individual T & C codes.

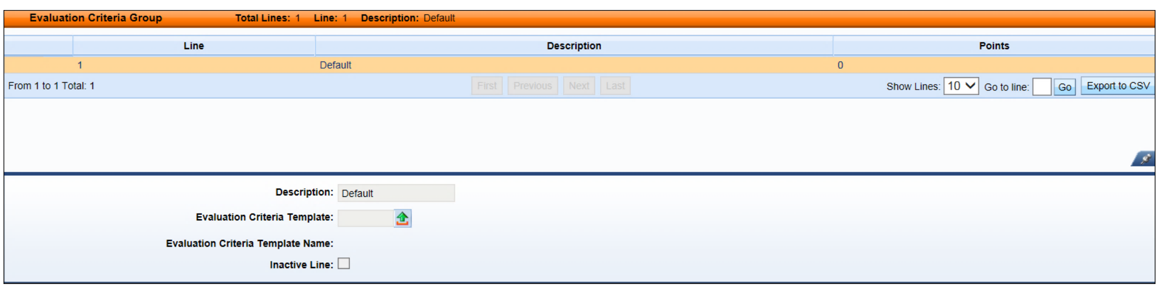
Figure 36: RFQ Document – Commodity T&C Section



RFQ Document - Evaluation Criteria Group Section

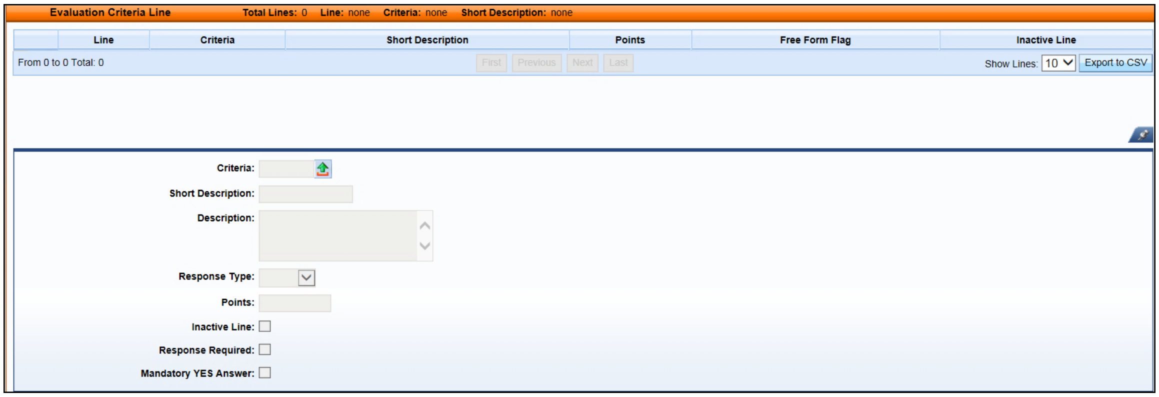
Users can use the Evaluation Criteria Group section shown in Figure 37 to categorize evaluation criteria by selecting an Evaluation Criteria Template. Once the template is entered, select the Load Evaluation Criteria button at the bottom of the page to load the associated Evaluation Criteria to the RFQ on the Evaluation Criteria Line section discussed below.

Figure 37: RFQ Document – Criteria Group Section



The Evaluation Criteria Line Section shown in Figure 38 is used to define specific criteria for evaluating responses and submittal requirements for the solicitation. This section can also be prepopulated from an Evaluation Criteria Template. If not prepopulated from a template, users can use the pick list to select the Criteria code and enter the Points associated with the criteria. If a response is required to the Evaluation Criteria in order for a vendor to submit a response, select the Response Required check box. If the vendor must answer yes to the criteria in order to be considered for award, select the Mandatory YES Answer check box.

Figure 38: RFQ Document – Evaluation Criteria Line Section



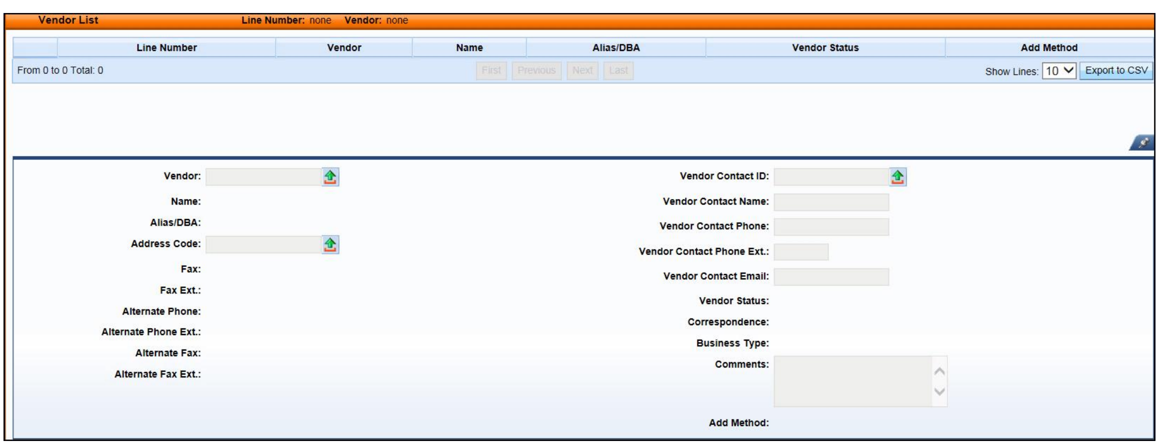
RFQ Document - Vendor List Section

Users can use the Vendor List section shown in Figure 39 to create a specific vendor notification list rather than notifying all vendors registered for the commodity. If a Vendor List code was entered on the Header of the RFQ and the Load Vendor List button at the bottom of the Header section is selected, this section prepopulates.

If the section is not prepopulated from a Vendor List, insert a new line and enter the following fields for each vendor that should receive the RFQ:

- **Vendor** – Unique identifier assigned to the vendor. Use the pick list to select the correct value.
- **Address Code** – Code ID given to a unique address for a vendor.

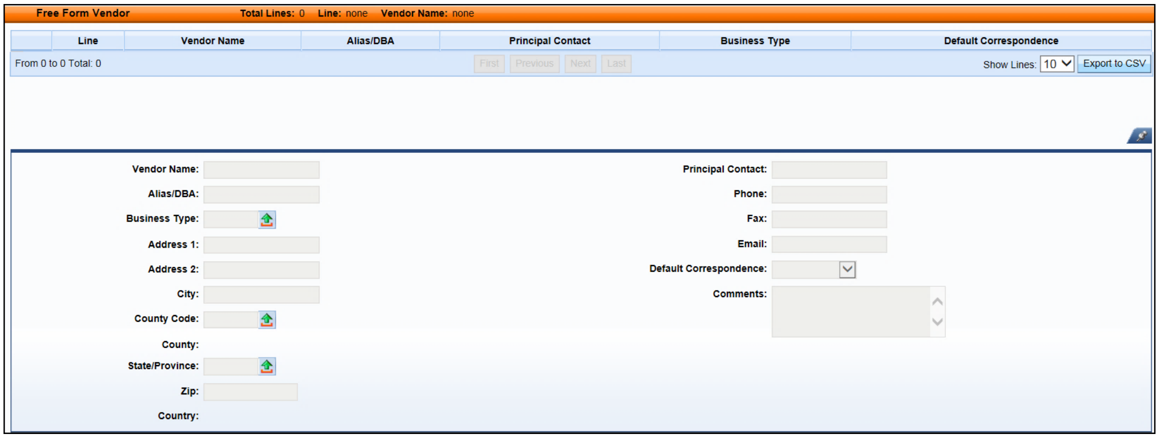
Figure 39: RFQ Document – Vendor List Section



RFQ Document - Free Form Vendor Section

Users can use the Free Form Vendor section shown in Figure 40 to list vendors to be included in the vendor list for a solicitation, using free form entry rather than a Vendor/Customer code defined in SIGMA.

Figure 40: RFQ Document – Free Form Vendor Section



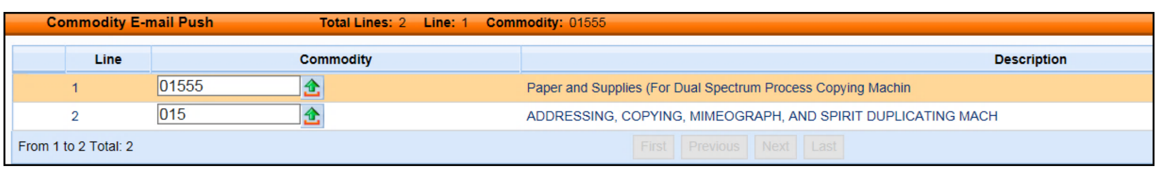
RFQ Document - Vendor Rotation Section

This section is not being utilized.

RFQ Document - Commodity Email Push Section

The Commodity Email Push section shown in Figure 41 is used for vendor notification. Records on the Commodity E-mail Push section are prepopulated based on the commodities on the commodity line. Users can add or delete a commodity from the Commodity E-mail Push section. All vendors registered for the commodities listed in this section are selected for notification.

Figure 41: RFQ Document – Commodity Email Push Section



RFQ Document – Publishing Section

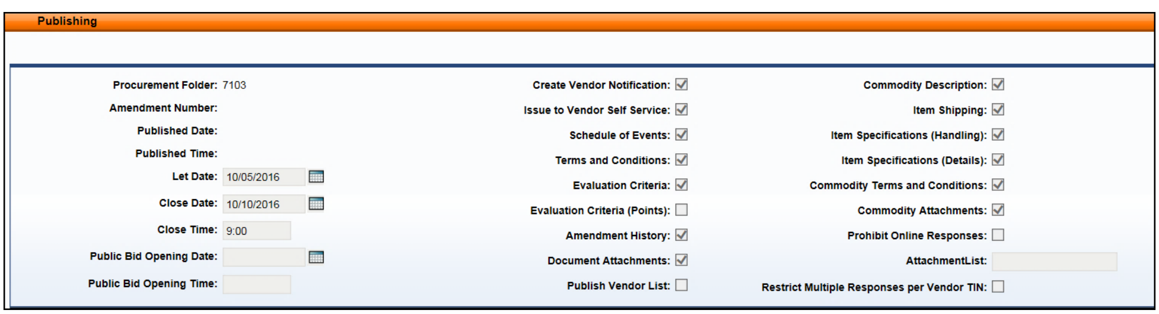
The Publishing section shown in Figure 42 contains a series of check boxes, most of which will be defaulted, users can use to indicate which sections of the solicitation are to be displayed on VSS, as well as to set the Bid Closing and Bid Opening dates and times. The Let Date, Close Date, and Close Time must be entered on this section.

> **Note:** The Let Date, Close Date and Close Time fields are formatted in military time. For example: 13:00 hours is 1:00 PM

The following check boxes are used to indicate which sections of the RFQ are to be displayed on VSS:

- **Schedule of Events** – Schedule of Events section on the RFQ
- **Terms and Conditions** – Terms and Conditions section on the RFQ
- **Evaluation Criteria** – Evaluation Criteria Lines listed on the RFQ
- **Evaluation Criteria (Points)** – points associated with the Evaluation Criteria Lines on the RFQ
- **Amendment History** – history of modifications to the solicitation
- **Document Attachments** – any documents attached to the header of the RFQ
- **Commodity Description** – description entered in the Commodity section of the RFQ
- **Item Shipping** – shipping information entered on the Shipping and Billing tab of the Commodity section of the RFQ
- **Item Specifications (Handling)** – handling information entered on the Specifications tab of the Commodity section
- **Item Specifications (Details)** – specifications information entered on the Specifications tab of the Commodity section
- **Commodity Terms and Conditions** – T & C entered on the Commodity T & C section
- **Commodity Attachments** – any documents attached to the commodity line of the RFQ

Figure 42: RFQ Document – Publishing Section



The remaining fields are optional:

- Select the Create Vendor Notification check box to notify all vendors on the defined vendor list of the solicitation. If there is no vendor list defined on the solicitation, all vendors registered for the commodity on the solicitation are notified.
- Select the Issue to Vendor Self Service check box to indicate that the solicitation should be published to VSS.
- Select the Publish Vendor List check box to indicate that the vendor list should be published to VSS.

- Select the Prohibit Online Responses check box to prevent vendors from responding to the solicitation online.

Create a Request for Quotes (RFQ)

The following steps can be followed to create an RFQ.

A. Create an RFQ.

  a. On the Secondary Navigation panel, select **Search.**
  b. Select **Document Catalog.**
  c. Select **Create.**
  d. In the Code field, enter **RFQ.**
  e. In the Dept field, enter **your Dept code.**
  f. In the Unit field, enter **your Unit code.**
  g. Select the **Auto Numbering** check box.

1. Select **Create.** The RFQ document displays. When the RFQ document is created, a new Document ID is generated. Notice that the document is shown as Ver: 1, Function: New, Phase: Draft.

B. Complete the Header section of the RFQ document

  h. In the Document Description field, enter **the item being bid.**
  i. In the Procurement Type ID field, enter **1** for Standard Procurement.
  j. Select the **Contact** tab.
  k. Select the Requestor ID picklist
  l. In the User ID field, select a User ID**.**
  m. Select **Save.**

2. Complete the Commodity section of the RFQ document

  a. In the Document Navigator, Select **Commodity.**
  b. Select **Insert New Line.**
  c. In the CL Description field, enter **description of item being bid.**
  d. Select a commodity code from the Commodity picklist.
  e. Select a value from the Line Type dropdown list.
  f. In the Quantity field, enter a value**.**
  g. Select a valid value from the Unit field**.**
  h. In the Unit Price field, enter a value.
  i. In the Effective From field, enter a date.
  j. In the Effective To field, enter a date.
  k. Select **Save.**
  l. Select the **Shipping/Billing** tab.
  m. In the Shipping Location field, select a shipping location
  n. In the Billing Location field, select a billing location**.**
  o. In the Shipping Method field, select one of the valid shipping methods.

p. Select a value from the Delivery Type dropdown list.

3. Complete the Schedule of Events section on the RFQ document

q. On the Document Navigator, select **Schedule of Events.**

r. Select the **Insert New Line** button.

s. In the Sequence field, enter **1.**

t. In the Event Code field, enter a valid Event Code.

u. In the Event Date field, enter a future date.

v. Select **Save.**

Schedule of Events Total Lines: 1 Line: 1 Line: 1

Line	Sequence	Days	Event Code	Event Name	Event Date
1	1	0	PRMT	Pre-proposal Meeting	10/11/2016

Note: Do not enter the Bid Opening or Bid Closing dates or times. These are set in the Publishing section of the RFQ.

3. Enter information in the Terms and Conditions page.

a. On the Document Navigator, Select **Terms and Conditions**.

b. Select the **Insert New Line** button.

c. Select a value from the **T & C** pick list.

4. Enter information in the Evaluation Criteria Line page.

a. On the Document Navigator, Select **Evaluation Criteria Line**.

b. Select the **Insert New Line** button.

c. Select a value from the **Criteria** pick list.

d. Enter a value in the Points field.

5. Enter information in the Publishing page.

a. On the Document Navigator, Select **Publishing**.

b. Verify that the **Create Vendor Notification** check box is selected. This must be selected in order for the email push to the vendors to function.

c. In the Let Date field enter today's date. This controls when the solicitation will be published.

d. In the Close Date field enter today's date.

e. In the Close Time field enter **1 hour from now in Military time format.** For example, enter 13:55 for 1:55pm.

Note: Once the document is submitted and becomes Final, there is a sync job that runs on the even hour starting at 08:00 through 16:00 (8:00 a.m. through 4:00 p.m.), that syncs this information with Vendor Self Service (VSS). If Buyers enter a time such as 13:55 instead of 14:00, this will ensure that the document is included in the upcoming sync cycle at 14:00 or 2:00.

6. Validate and submit the RFQ document.

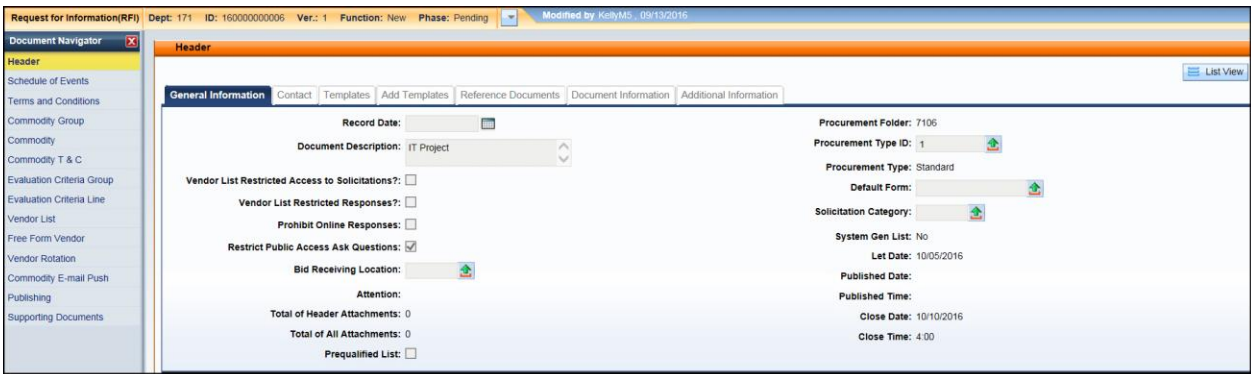
   a. Select the **Validate** button to check for errors.

   b. Select the **Submit** button to submit the document to Final, after all errors are resolved.

Request for Information (RFI)

The Request for Information (RFI) document shown in Figure is used to collect information about the capabilities of vendors and help make a decision on what steps to take next; however, the detailed requirements to achieve the goal need to be defined. The sections and fields on the RFI are the same as those described above for the RFQ.

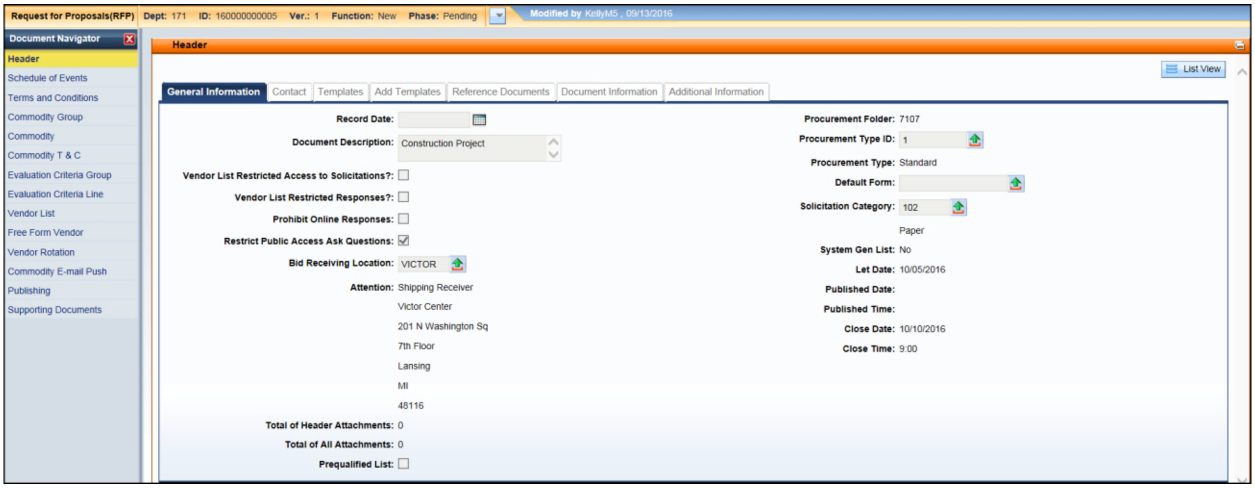
Figure 43: Request for Information (RFI) Document



Request for Proposals (RFP)

The Request for Proposal document shown in Figure 44 is a formal competitive bidding process. The Request for Proposal can be designed in a manner that provides the vendor with the specific goods or services needed, and a request is made for pricing, or designed in a manner that identifies critical business and technical requirements. A responding vendor must provide their qualifications, an approach, details about the solution, and pricing information. The sections and fields on the RFP are the same as those described above for the RFQ.

Figure 44: Request for Proposals (RFP) Document

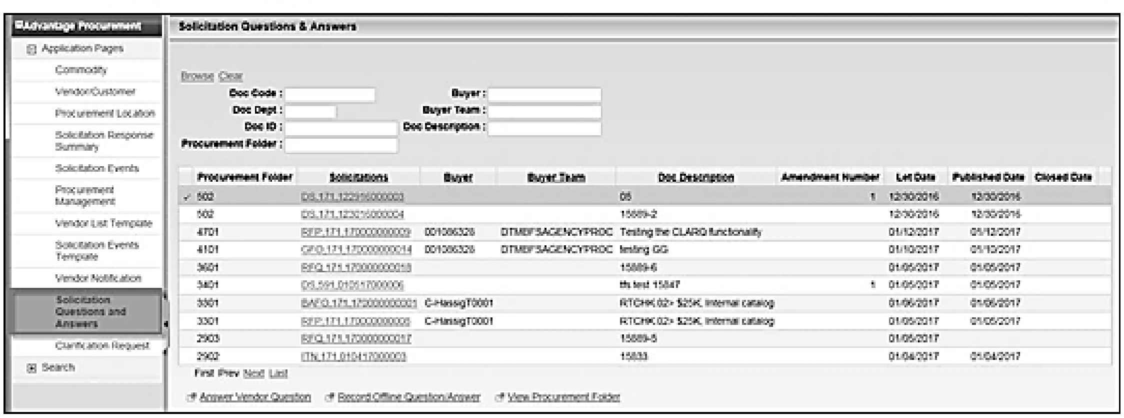


Solicitation Questions and Answers

The Solicitation Questions and Answers page, Figure 45, allows buyers to search for a solicitation and answer a vendor's question submitted online through VSS or received offline by doing one of the following:

- Highlight the solicitation line and, select the Answer Vendor Question link to access the Answer Vendor Question page. This page is for the Procurement Officer to record his/her response to the Solicitation inquiry submitted through VSS.
- Highlight the solicitation line and select the Record Offline Question/Answer link to access the Record Offline Question/Answer page. This page is for the Buyer to record the questions received offline and his/her responses to the questions received offline.

Figure 45: Application Pages – Solicitation Questions and Answers



Solicitations are added to this page once the first question has been asked in Vendor Self Service and VSS has been synchronized with SIGMA Procurement, which is normally every two hours starting at 8 am and ending at 4 pm. Buyers receive an email notification once a question has been submitted for their solicitation. A Buyer can search for a solicitation using wildcard characters. The grid allows a buyer to sort by the column headings that are underlined. The buyer can also use the First, Prev, Next, and Last links.

When a Buyer responds to a question on the Answer Vendor Question page or on the Record Offline Question/Answer page, an email notification is generated to the vendor who asked the question alerting them of the response. This notification is only generated if an email address was provided as part of the record.

Solicitation Response (SR)

Solicitation Responses can be entered manually using the Solicitation Response (SR) document.

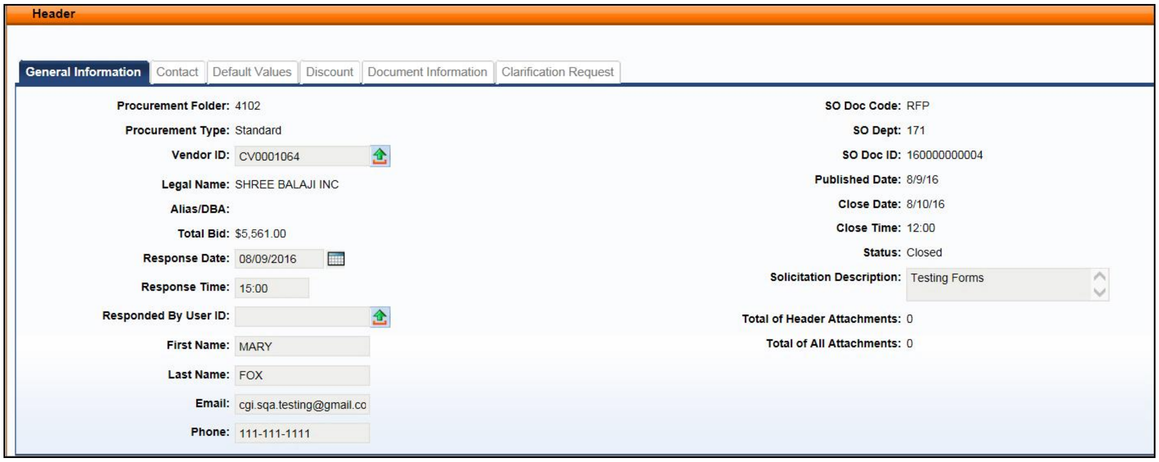
Users create an SR document by copying forward from the original solicitation document (RFQ, RFI or RFP). This action copies much of the information from the original solicitation into the SR document. The SR document has a Header and five detail sections, which are described below.

SR Document – Header Section

The Header section shown in Figure 46 is used to record general information describing the procurement and the vendor's response. The tabs are:

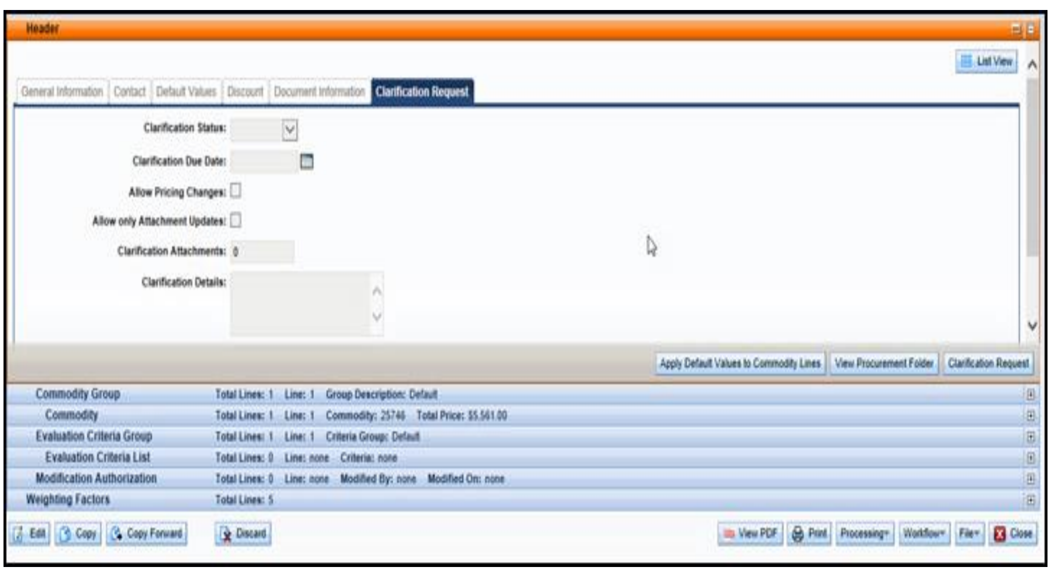
- **General Information Tab** – enter the Vendor ID of the Vendor responding as well as the Response Date and Response Time
- **Contact Tab** –will be auto populated from the referenced solicitation
- **Default Values Tab** – enter a Response Type (for example, Bid, No Bid, or Bid with Condition), Comments, and Delivery Days on the Default Values tab of the Header to default the same value to all commodity lines
- **Discount Tab** – enter discount information that applies to all commodity lines
- **Document Information Tab** – will be auto populated from the referenced solicitation
- **Clarification Request Tab** – used by the buyer to request clarification on a bid from the submitting vendor. This tab is discussed in more detail below.

Figure 46: SR Document – Header Section



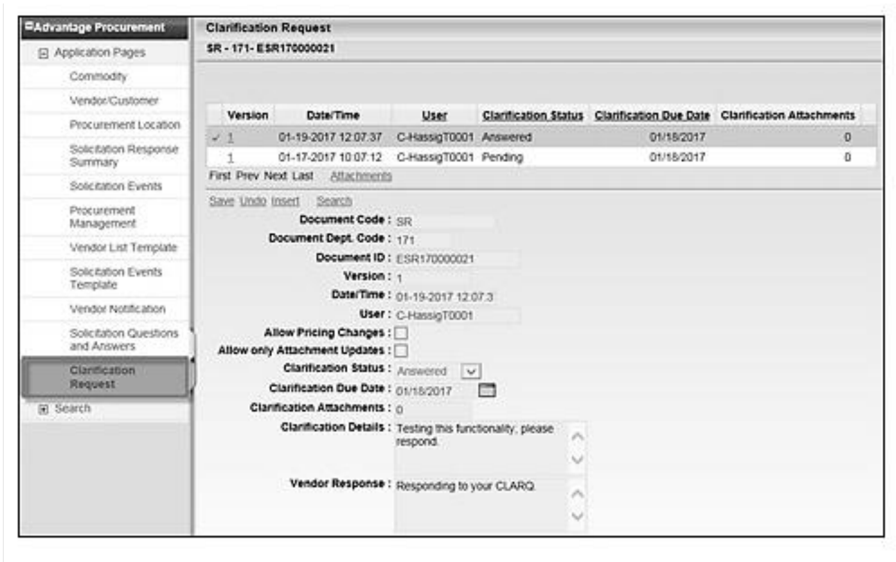
The Clarification Request tab of the Header section shown in Figure 47 is used by the buyer to request clarification on a bid from the submitting vendor. Select the Clarification Request button at the bottom of the page to open the Clarification Request page and record the clarification request. Information recorded on the Clarification Request page is visible to the vendor in VSS via the original solicitation response, and the vendor receives a notification email that a clarification request exists. The vendor can then respond to the request for clarification via VSS.

Figure 47: SR Document – Clarification Request Tab



The Clarification Request page, Figure 48, is used as a central repository for tracking all clarification requests made on Solicitation Response (SR) documents. Buyers and evaluators can use clarification requests to allow vendors to update or clarify their bids on an already submitted SR document even after the solicitation has closed or the evaluation process has begun. This page is the starting point for when an evaluator requests further clarifications on a submitted SR and tracks the status of the clarification request record all the way through completion. This page can be accessed via the Clarification Request action on the Solicitation Response document or from the Procurement Management page.

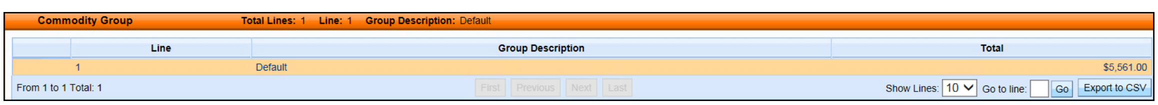
Figure 48: Application Pages – Clarification Request



SR Document – Commodity Group Section

The Commodity Group section shown in Figure 49 displays commodity categories associated with the solicitation and totals by Commodity category. This tab auto populates from the referenced solicitation and cannot be updated.

Figure 49: SR Document – Commodity Group Section

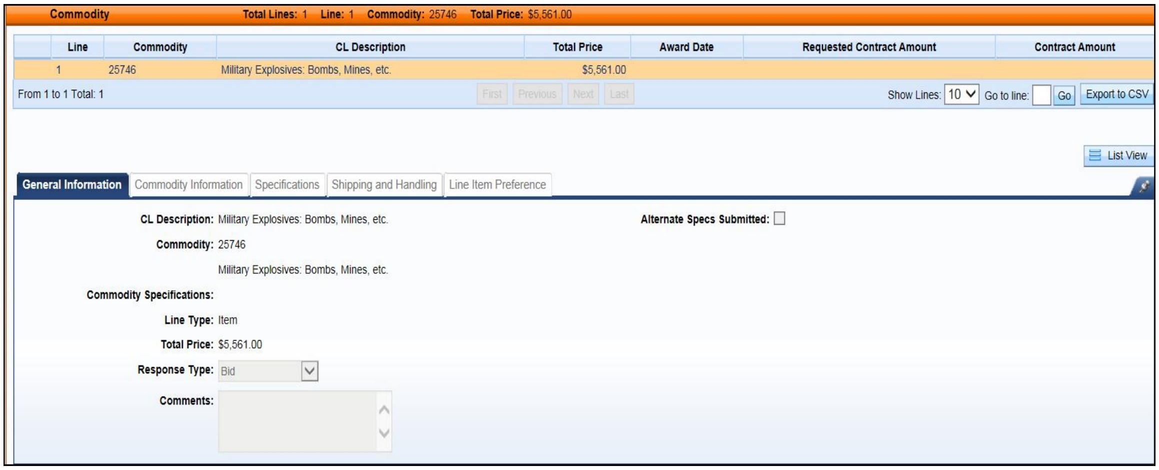


SR Document – Commodity Section

The Commodity section shown in Figure 50 is used to record the response details by Commodity. The commodity information auto populates from the referenced solicitation. The Commodity section has five tabs:

- **General Information Tab** – enter the Response Type (Bid, No Bid, No Response, Bid with Conditions) and any comments
- **Commodity Information Tab** – enter the Bid Contract Amount
- **Specifications Tab** – record alternate item specifications if permitted on this solicitation
- **Shipping and Handling Tab** – record alternate shipping and billing information if permitted on this solicitation
- **Line Item Preference Tab** – This tab is not being utilized

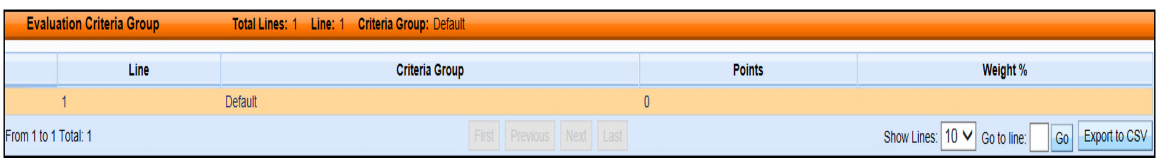
Figure 50: SR Document – Commodity Section



SR Document – Evaluation Criteria Group Section

The Evaluation Criteria Group section shown in Figure 51 is used to display evaluation criteria categories. This tab auto populates from the referenced solicitation and cannot be updated.

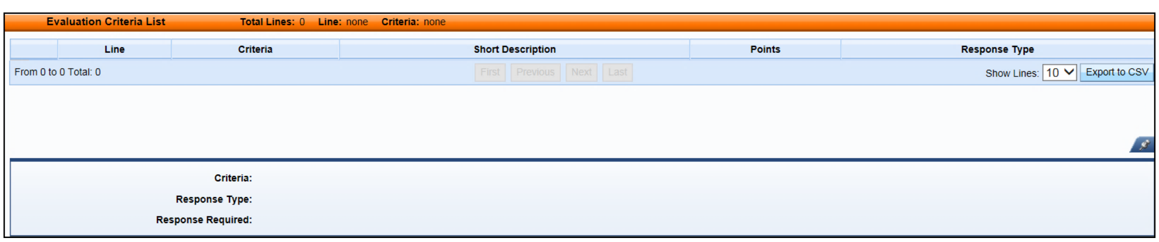
Figure 51: SR Document – Evaluation Criteria Group Section



SR Document – Evaluation Criteria Line Section

The Evaluation Criteria Line section, shown in Figure 52, auto populates from the referenced solicitation. This is where vendor responses are recorded to specific criteria for evaluating responses.

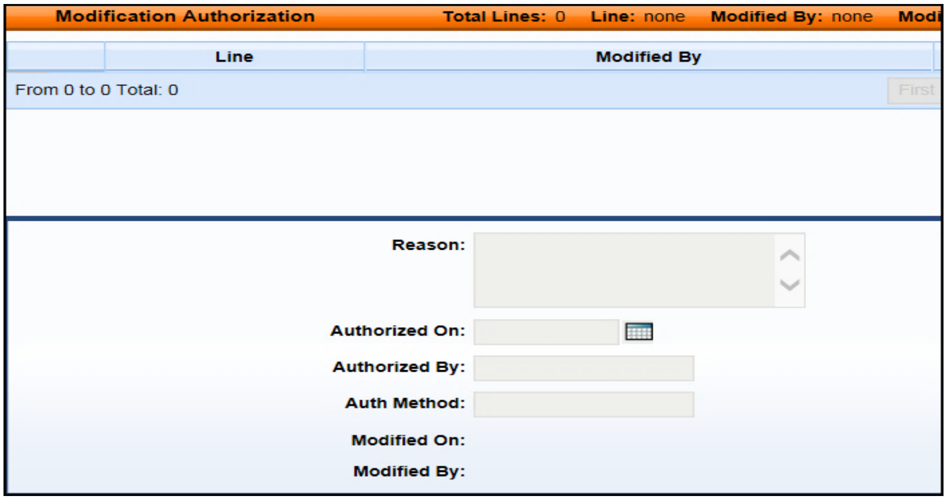
Figure 52: SR Document – Evaluation Criteria Line Section



SR Document – Modification Authorization Section

The Modification Authorization section shown in Figure 53 must be completed by the buyer when making a modification to a response on behalf of the vendor. This section is only used when modifying an existing SR.

Figure 53: SR Document – Modification Authorization Section



SR Document – Weighting Factors Section

This section is not being utilized.

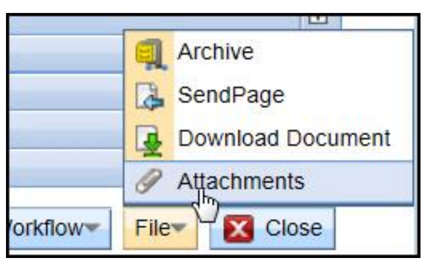
Document Attachments

Files may be attached to a solicitation response document (a single file may not exceed 6 MB; there is no limit on the number of files).

The following steps can be followed to attach documents:

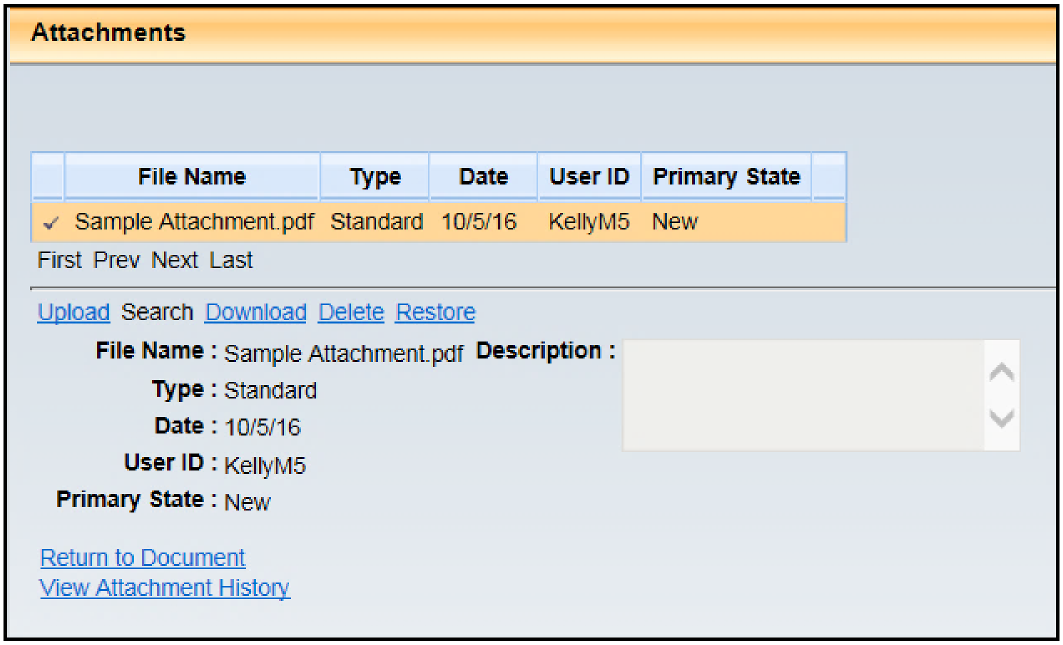
1. Selecting the Header or a Commodity Line.
2. Selecting the File button.
3. Selecting the Attachments option as shown in Figure 54.

Figure 54: Attaching a File



4. The Attachments page opens as shown in Figure 55. On this page, upload the file.

Figure 55: Attachments Page



5. Enter a Description and an Attachment Type. Three Attachment Types are available:

- **Proprietary** – attachment will not be posted to VSS in the Public Bid Reading area of the solicitation if responses are published
- **Pricing** – only available if the referenced solicitation does not contain information in the Commodity Response section. Pricing attachments will remain in the VSS lockbox until the Pricing Attachment Open Date and Pricing Attachment Open Time established by the Buyer on the Evaluation (EV) document have passed. The Pricing Attachment Open Date and Pricing Attachment Open Time are different than the Close Date and Close Time on the solicitation.
- **Catalog Picture** – use if the file is a picture of a Catalog Item. Used when the Commodity Line Type is Catalog Item.

Note: The only way to change the Attachment Type, once a file has been selected and attached, is to delete the attachment and then re-attach with the correct Attachment Type.

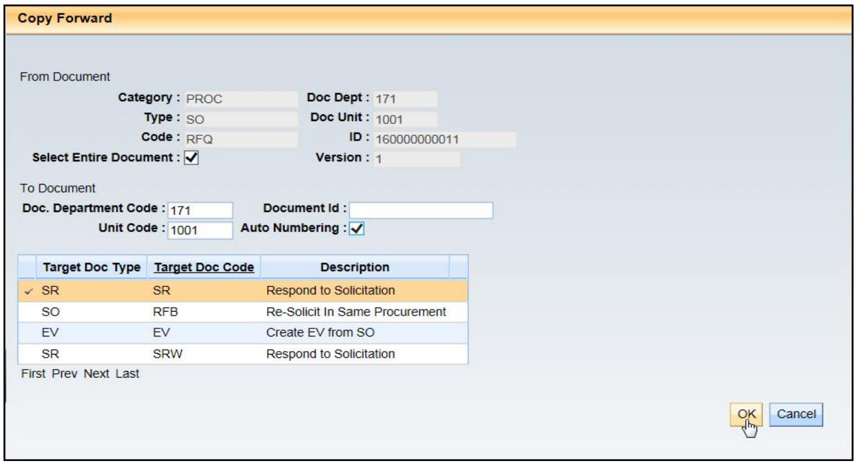
Record a Solicitation Response

The following steps can be followed to record a solicitation response:

A. Copy forward from the RFQ to create the first SR.

1. From the Secondary Navigation panel, select **Search**
2. Select **Document Catalog**
3. Enter search criteria to find the RFQ to be used to copy forward to the Solicitation Response
4. Open the **RFQ**
5. Select **Copy Forward**.

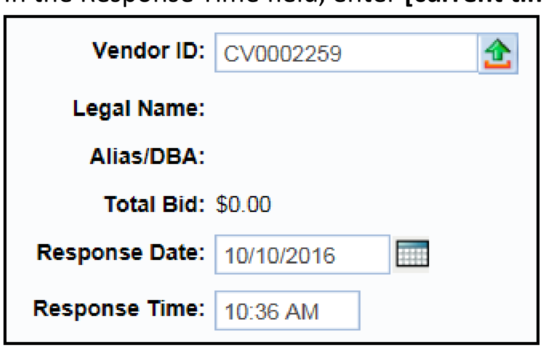
6. In the Doc. Department Code field, enter **your department code**.
7. In the Unit Code field, enter **your unit code**.
8. Select the **Auto Numbering** check box. Auto Numbering will assign a document ID to the RFQ automatically.
9. In the grid, select the line that corresponds to the Target Doc Code of SR.
10. Select **OK**.



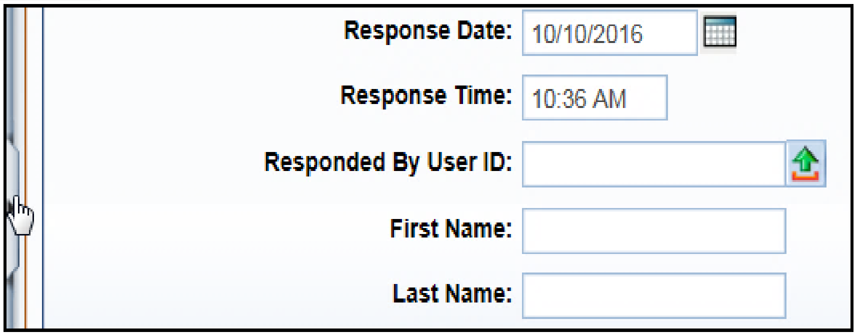
11. A new SR is created. When the SR document is created, a new Document ID is generated. The document is shown as Ver: 1, Function: New, Phase: Draft.

C. Enter information on the General Information tab of the Header page.

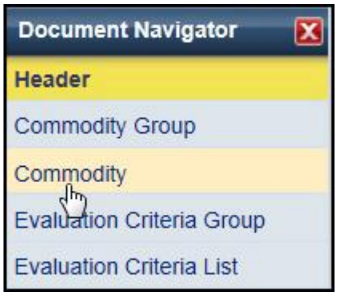
1. In the Vendor ID field, enter **a Vendor Record number.**
2. In the Response Date field, enter **[today's date]**.
3. In the Response Time field, enter **[current time in military HH:MM format]**.



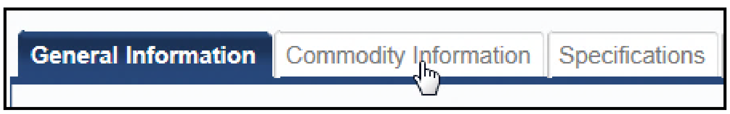
4. Select the Open Document Navigator icon (small arrow on left side) to switch to Document Navigator mode.



5. On the Document Navigator, select **Commodity**.



6. On the Commodity page, select the **Commodity Information** tab.

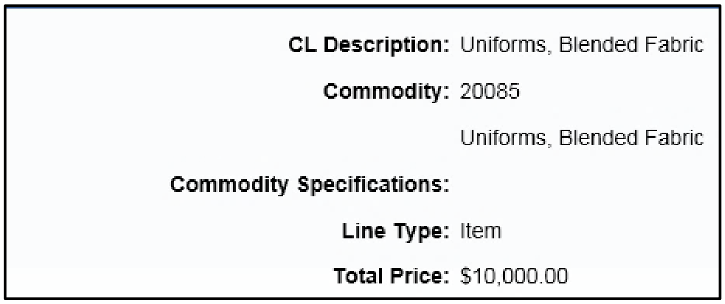


D. Enter information on the Commodity page.

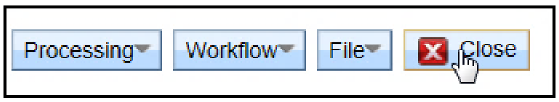
1. Review the requested commodity information. This information is auto populated from the solicitation document.
2. On Commodity Line 1 in the Unit Price field, enter **the correct price**.
3. On Commodity Line 1 in the Delivery Days from Award field, enter **whatever applies**.

E. Validate and submit the SR document.

1. Select the **Validate** button to check for errors. If any errors exist, correct the errors and select the Validate button again. If the validation is successful, the following message displays in the upper left corner of the page: Document validated successfully.
2. Select the **General Information** tab.
3. Review the Total Price auto populated on Line 1 of the Commodity page. An example is shown below:



4. Select the **Submit** button to submit the document after all errors are resolved. If the submission is successful, the following message displays in the upper left corner: Document submitted successfully.
5. Select **Close** to return to the RFQ.

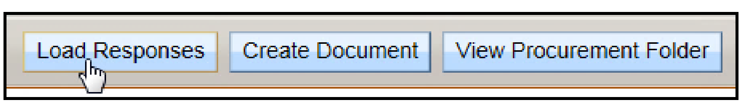


Evaluation (EV)

The Evaluation (EV) document allows the user to view responses from vendors for a specific solicitation. Much of the information on the Evaluation document defaults from the solicitation document; the remaining information comes from the solicitation responses. The Evaluation document consists of a series of sections displaying the information collected in various views, as well as totaling the scores recorded on the EV. The EV is used to record the evaluation of vendor's responses. The EV document is also used to issue awards.

Create an EV document by copying forward from the solicitation. Once the EV is created, click the Load Responses button shown in Figure 56 on the header of the document to import the associated vendor responses. This begins the solicitation response evaluation process.

Figure 56: Load Responses Button on EV



The Evaluation document has a Header and fourteen detail sections, described below.

EV Document – Header Section

The Header section of the EV, Figure 57, displays general information about the solicitation being evaluated. Click the Load Responses button to load all vendor responses to the EV. This includes the responses that are entered via VSS, and the ones that have been entered manually on Solicitation Response (SR) documents.

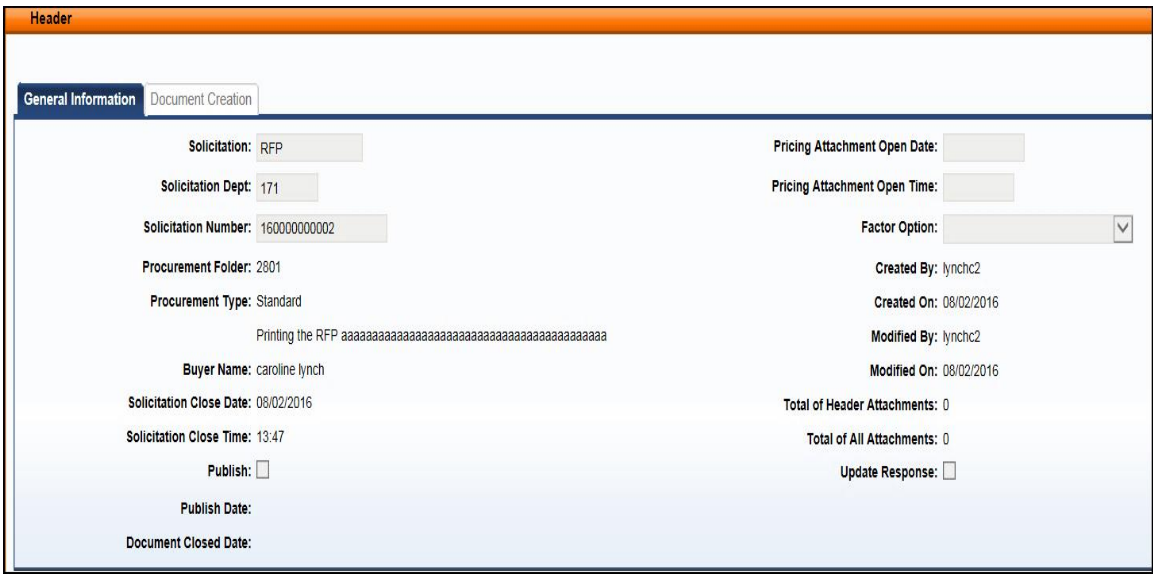
The Header section has two tabs:

- General Information Tab – described below
- Document Creation Tab – this tab will not be used by Local Entities

On the General Information tab, specify on the Header when Pricing Attachments, if included, should be loaded to the EV by entering a Pricing Attachment Open Date and Pricing Attachment Open Time. Once the Pricing Attachment Open Date and Pricing Attachment Open Time have passed, all Pricing Attachments will be loaded to the EV. This allows the buyer to first evaluate the vendors, without the influence of pricing, then afterwards with pricing information.

The remainder of the information on the General Information tab of the Header section is auto populated from the solicitation used for the copy forward and cannot be updated.

Figure 57: EV Document – Header Section



EV Document – Load Statistics Section and Load Statistics Detail Section

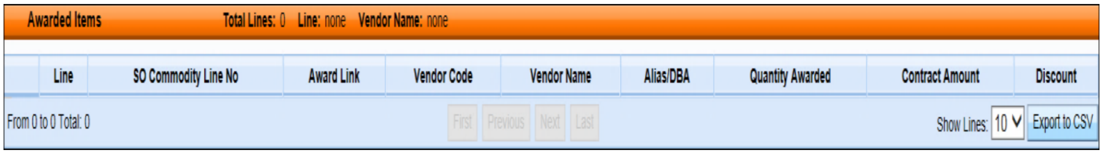
The Load Statistics section of the EV displays a count of the total number of responses, responses loaded, and responses to load. The Load Statistics Details section shown in Figure 58 displays a vendor identified list of the responses, how they were entered, when they were received, when they were loaded, and when they were published to VSS. Both of these sections are auto populated when the Load Vendor Responses button is clicked and cannot be updated.

Figure 58: EV Document – Load Statistics Detail Section

EV Document – Awarded Items Section

Local Entities will not be utilizing this section, shown in Figure 59.

Figure 59: EV Document – Awarded Items Section



EV Document – Bid Tabulation Section

The Bid Tabulation section shown in Figure 60displays all vendor responses, in grid format, by commodity group and line. The lowest bid for a commodity line, commodity group, and lowest bid overall are displayed in bold. If a vendor has submitted a No Bid for any part of their solicitation response, the words NO BID will be displayed. This section is auto populated when the EV is processed and cannot be updated.

Figure 60: EV Document – Bid Tabulation Section

Bid Tabulation

Group		**Coca Cola**
Default		
	1	$10,000.00
	2	$11,099,889.00
	3	$49,333,333,284.00
	4	$10,000.00
	5	$8.00
	6	$8.00
	7	$8.00
	8	$8.00
	9	$8.00
	10	$8.00
	11	$8.00
	12	$8.00
	13	$8.00
	14	$8.00
	15	$8.00
	16	$8.00
	17	$8.00
	18	$8.00
	19	$8.00
	20	$8.00
	21	$8.00
	22	$8.00
	23	$8.00
	24	$8.00
	25	$8.00
	26	$8.00
	27	$8.00
Total For Default		$49,344,453,357.00
Total Bid		$49,344,453,357.00

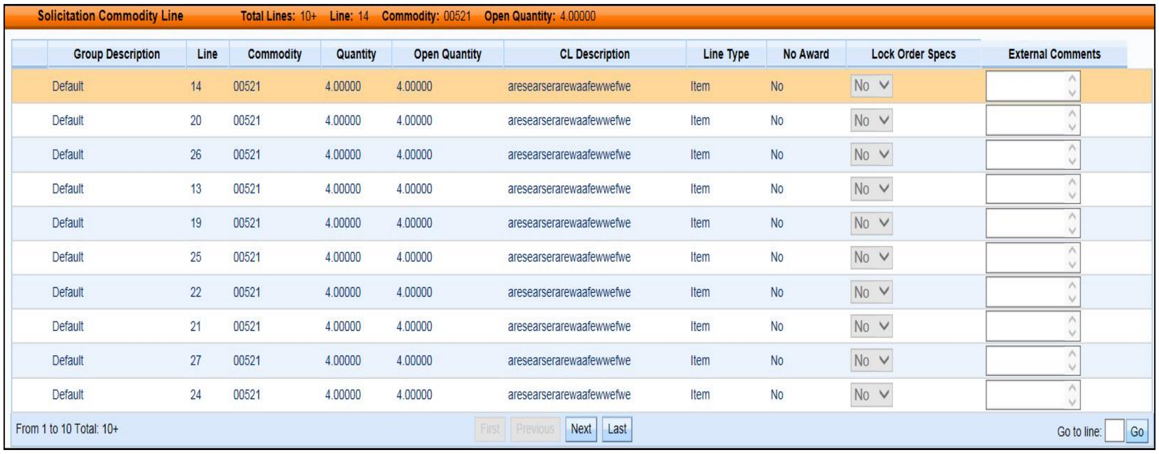
EV Document – Evaluators Section

This section is not being utilized.

EV Document – Solicitation Commodity Line Section

The Solicitation Commodity Line section, shown in Figure 61, displays commodity line information from the associated solicitation. Information is displayed in commodity group/commodity line order. This section is auto populated from the solicitation used for the copy forward and can only be modified in extreme cases.

Figure 61: EV Document – Solicitation Commodity Line Section



Group Description	Line	Commodity	Quantity	Open Quantity	CL Description	Line Type	No Award	Lock Order Specs	External Comments
Default	14	00521	4.00000	4.00000	aresearserarewaafewwefwe	Item	No	No	
Default	20	00521	4.00000	4.00000	aresearserarewaafewwefwe	Item	No	No	
Default	26	00521	4.00000	4.00000	aresearserarewaafewwefwe	Item	No	No	
Default	13	00521	4.00000	4.00000	aresearserarewaafewwefwe	Item	No	No	
Default	19	00521	4.00000	4.00000	aresearserarewaafewwefwe	Item	No	No	
Default	25	00521	4.00000	4.00000	aresearserarewaafewwefwe	Item	No	No	
Default	22	00521	4.00000	4.00000	aresearserarewaafewwefwe	Item	No	No	
Default	21	00521	4.00000	4.00000	aresearserarewaafewwefwe	Item	No	No	
Default	27	00521	4.00000	4.00000	aresearserarewaafewwefwe	Item	No	No	
Default	24	00521	4.00000	4.00000	aresearserarewaafewwefwe	Item	No	No	

EV Document – Award by Line Section

Local Entities will not be utilizing this section.

EV Document – Award by Group Section

Local Entities will not be utilizing this Section.

EV Document – Award by Total Section

Local Entities will not be utilizing this Section.

EV Document – Rank by Criteria Group Section

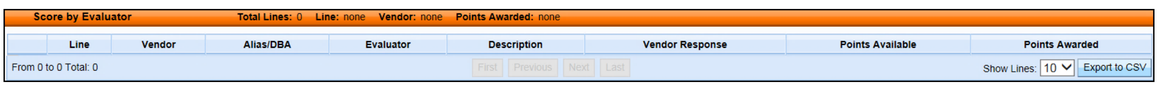
The Rank by Criteria Group section, shown in Figure 62, displays vendor points by evaluation criteria group. It displays the vendor's overall rank, based on the total points received. This section is auto populated when the EV is processed and cannot be updated.

Figure 62: EV Document – Rank by Criteria Group Section

EV Document – Score by Evaluator Section

The Score by Evaluator section shown in **Error! Reference source not found.**Figure 63 displays the scores entered by the evaluators on the Score by Criteria section on the EV. Multiple evaluators cannot enter information on the EV. The evaluation process will be done off line and the summary of the evaluation will be entered by the Buyer. This section is auto populated when the EV is processed and cannot be updated.

Figure 63: EV Document – Score by Evaluator Section



EV Document – Score by Criteria Section

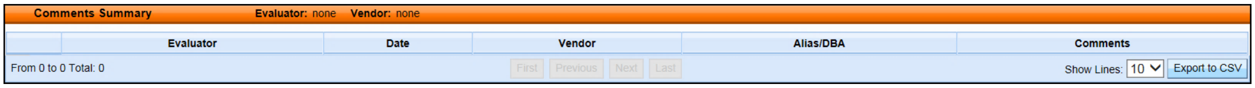
Use the Score by Criteria section shown in Figure 64to view and score the vendors' criteria responses directly on the EV document. Begin by clicking the Load Criteria Line button. This loads the criteria lines to the EV document. Use the Points Awarded field to establish a score for each vendor's Evaluation Criteria response.

Figure 64: EV Document – Score by Criteria Section

EV Document – Comments Summary Section

The Comments Summary section shown in Figure 65allows buyers to enter comments onto the EV. The comments are displayed in Evaluator order. The comment is free form but any comments are a matter of public record. If a comment does not exist, an error will be received upon creation of the award document.

Figure 65: EV Document – Comments Summary Section



EV Document – Weighting Factors Section

Local Entities will not be utilizing this section.

Create and Evaluation (EV) Document

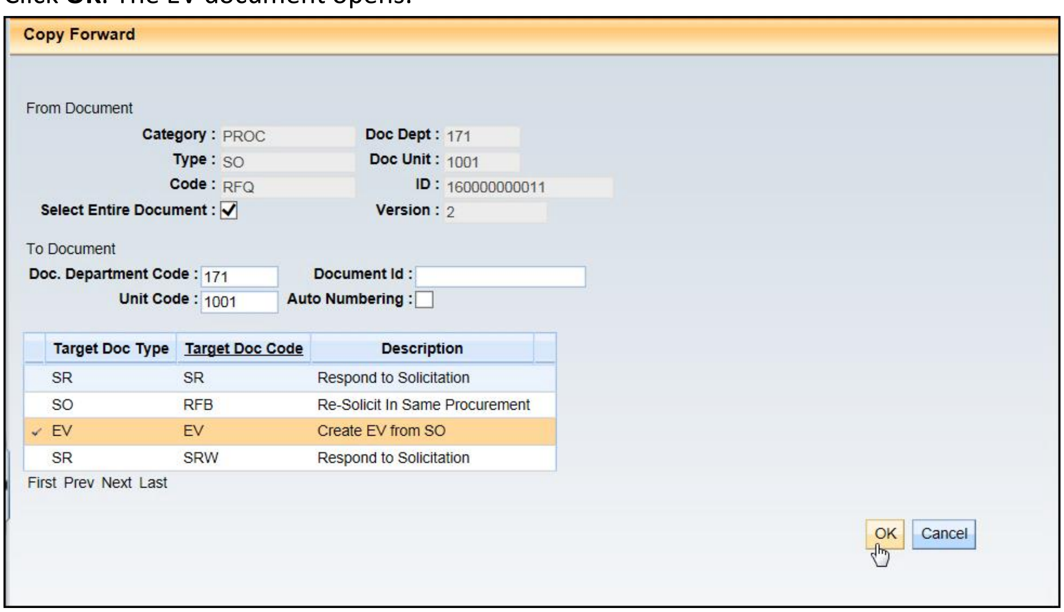
Following are the steps to follow to create an EV document:

A. Search for the RFP.

1. On the Secondary Navigation panel, select **Search**.
2. Select **Document Catalog**.
3. In the Code field, enter **RFP**.
4. In the Dept field, enter **your Dept code**.
5. In the ID field, enter **the value from your recently created RFP document.**
6. Select the **Browse** link.

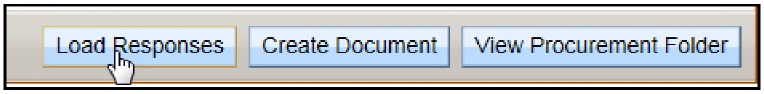
B. Copy Forward from the RFQ to create an EV.

1. Click **Copy Forward**.
2. In the Doc. Department Code field, enter **your department code**.
3. In the Unit Code field, enter **your unit code**.
4. Select the **Auto Numbering** check box.
5. In the grid, click the line that corresponds to the Target Doc Code of EV.
6. Click **OK**. The EV document opens.

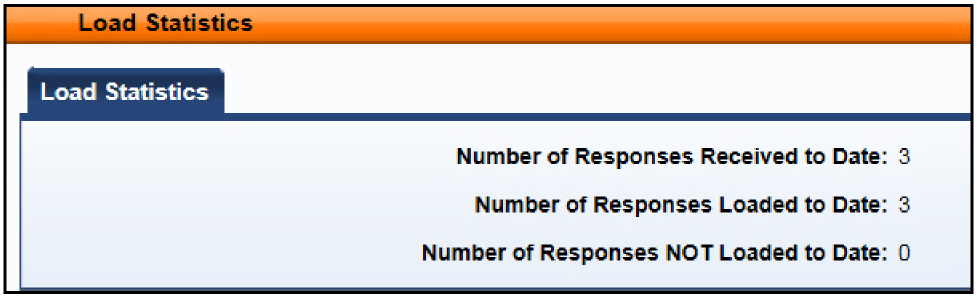


C. Load vendor responses to the EV.

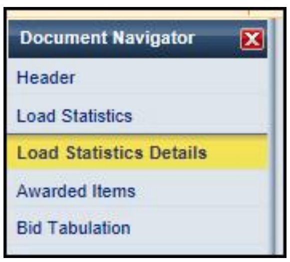
1. Click the **Load Responses** button in the lower right corner of the EV.



2. On the Document Navigator, click **Load Statistics**. Review the Number of Responses Received to Date and the Number of Responses Loaded to Date fields.



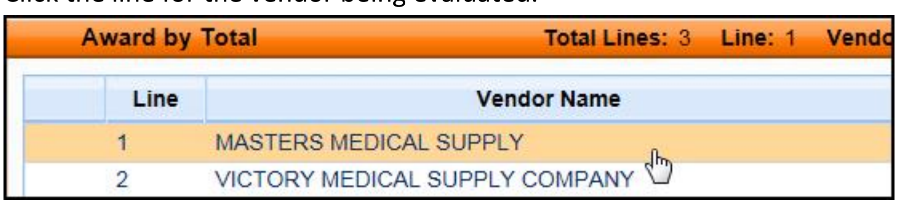
3. On the Document Navigator, click **Load Statistics Detail**. Review the details for each vendor response loaded.



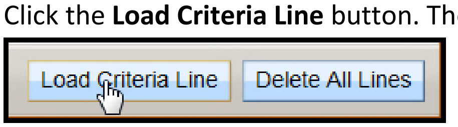
4. On the Document Navigator, click **Award by Total**.

D. Enter evaluator scores for each vendor, then close the document and return to the Home page.

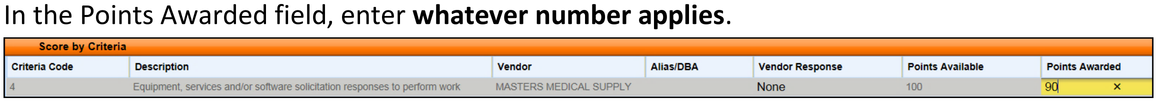
1. Click the line for the vendor being evaluated.



2. On the Document Navigator, click **Score by Criteria**.
3. Click the **Load Criteria Line** button. The evaluation criteria are loaded to the EV.



4. In the Points Awarded field, enter **whatever number applies**.



5. On the Document Navigator, click **Award by Total**.
6. Click the line for the vendor being evaluated.

7. On the Document Navigator, click **Score by Criteria**.
8. In the Points Awarded field, enter **whatever number applies**.
9. On the Document Navigator, click **Award by Total**.
10. Click the line for **the vendor being scored**. Below is an example only:

11. On the Document Navigator, click **Score by Criteria**.
12. In the Points Awarded field, enter **whatever number applies**.
13. Click **Save**.

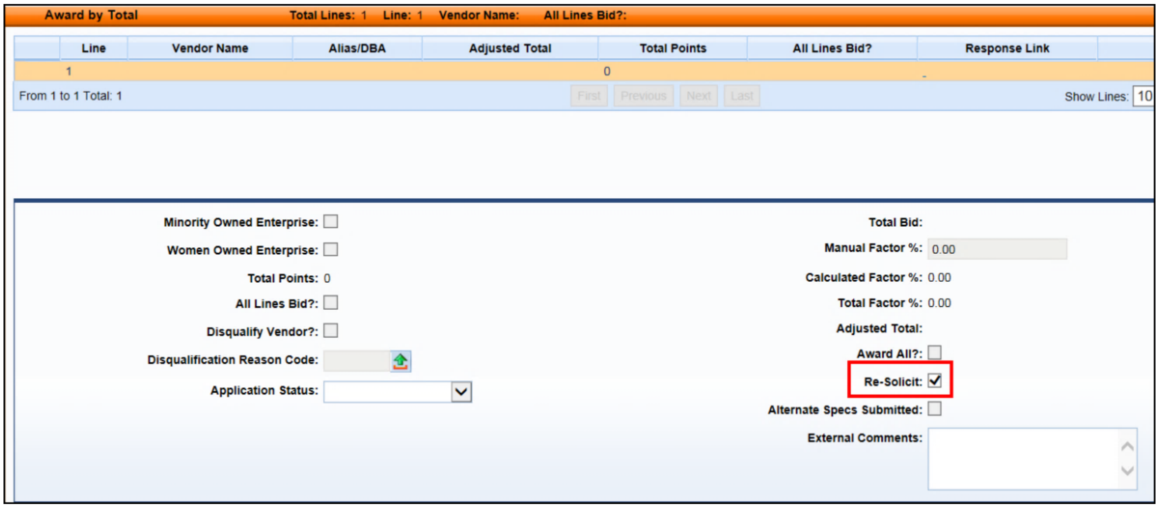
Negotiation (BAFO)

The sections and fields on the Negotiation (BAFO) document are the same as those described for the Request for Proposal (RFQ) document. The BAFO is used for additional rounds of solicitation, using the following process:

- A Request for Proposal (RFP) is issued.
- Vendors respond via Vendor Self Service (VSS) or if paper responses are received then responses are entered in SIGMA using the Solicitation Response (SR) document.

  Vendor responses are evaluated using the Evaluation (EV) document. The EV is marked as a Re-Solicit by selecting the Re-Solicit check box on the Award by Total section of the EV shown in Figure 66

Figure 66: EV Document – Award by Total Section

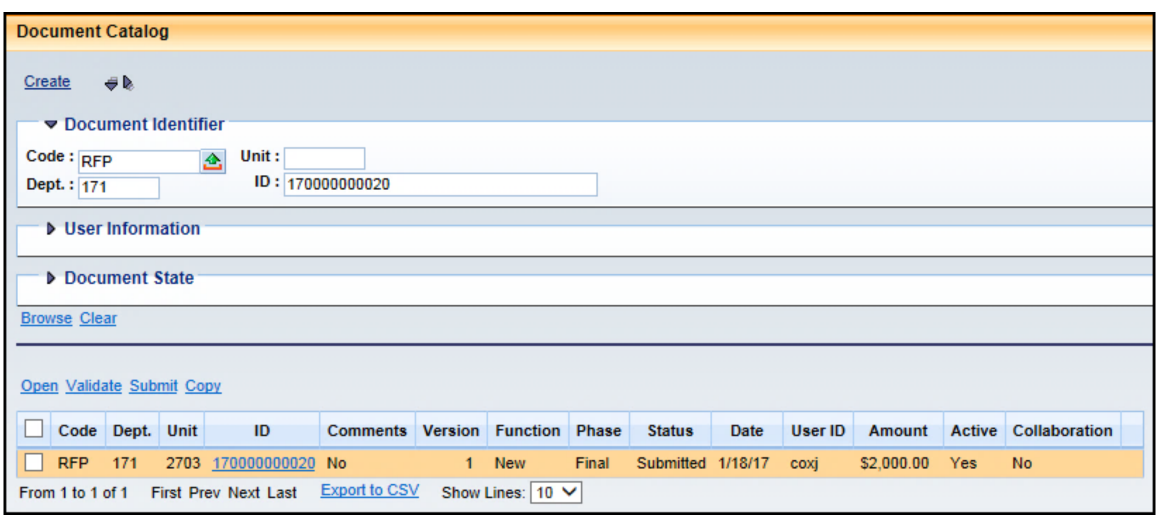


As a result of the evaluation, specific vendors are selected from the RFP to participate in an additional round of a solicitation. Vendors are provided the opportunity to alter portions of their original response to the solicitation.

Create a Negotiation (BAFO)

Following are the steps to follow to create a BAFO:

1. Search for the RFP.
   a. On the Secondary Navigation panel, Select **Search**.
   b. Select **Document Catalog**.
   c. In the Code field, enter **RFP**.
   d. In the Dept field, enter **your Dept code**.
   e. In the ID field, enter **the value from your recently created RFP document.**
   f. Select the **Browse** link.

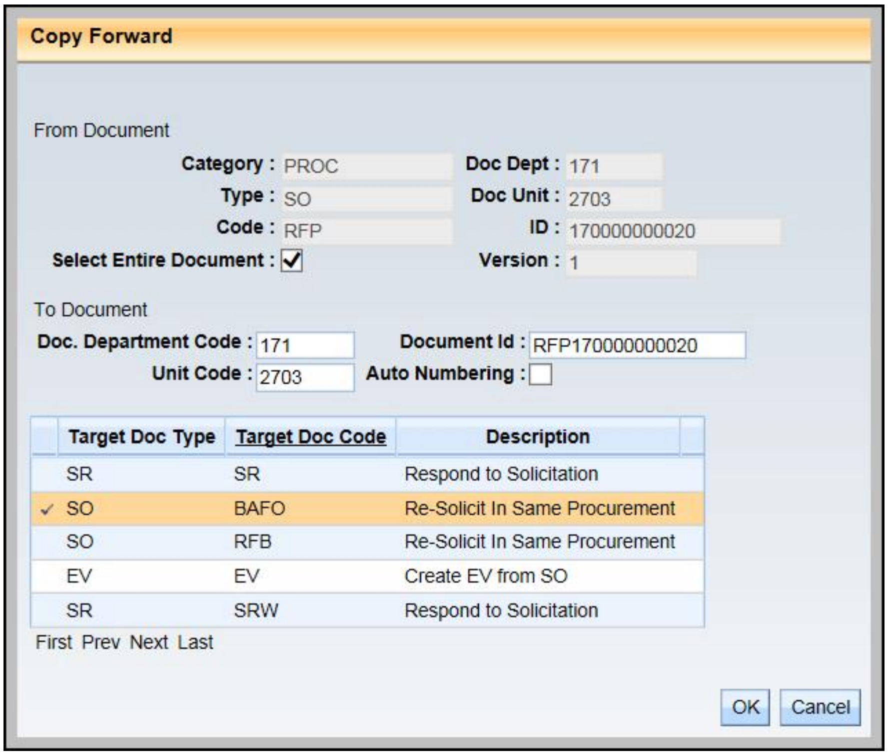


g. Select the link for the RFP Document ID.

2. Copy Forward from the RFP to create the Negotiation (BAFO).

   a. On the RFP document, select the **Copy Forward button**.

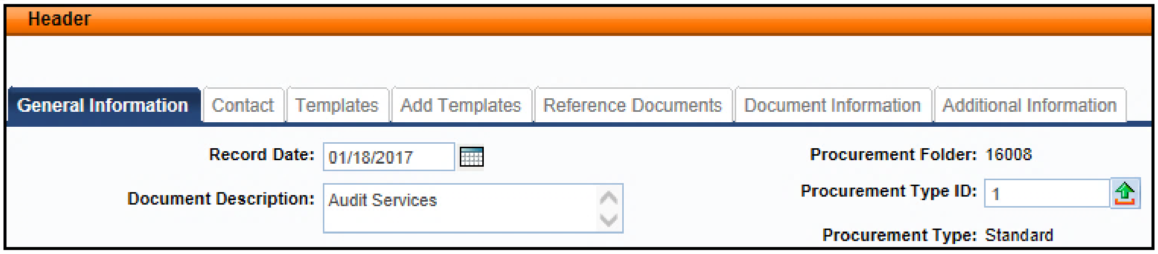
   b. On the Copy Forward page, in the Doc. Department Code field, enter **your Dept code**.
   c. In the Unit Code field, enter **your unit code**.
   d. In the Document Id field, enter a document ID to be used for the BAFO.
   e. In the grid, select the line that corresponds to the Target Doc Code of BAFO.



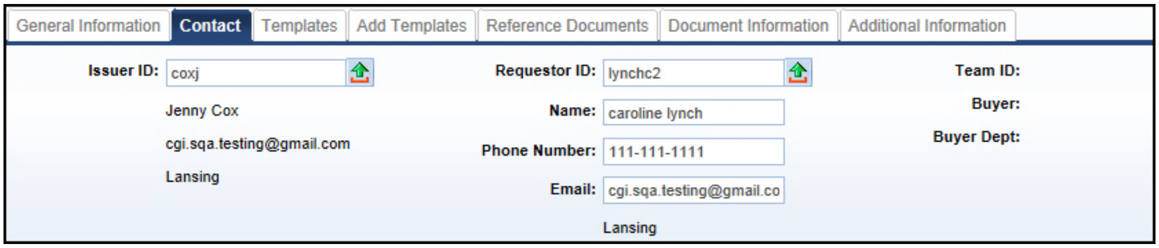
   f. Select **OK**. The Negotiation (BAFO) is created. When creating the document, a new Document ID is generated. The document is shown as Ver: 1, Function: New, Phase: Draft.

3. Verify information on the General Information tab of the Header section.

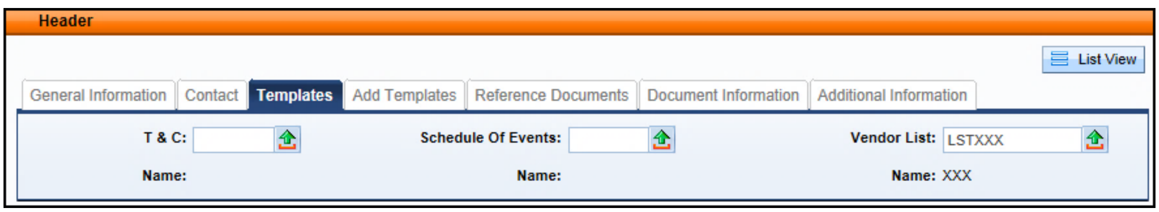
   a. Review the Document Description and the Procurement Folder fields. This information is copied forward from the RFP document.
   b. On the Header section, select the **Contact** tab.



4. Verify information on the Contact tab of the Header section.
    a. Review the Issuer and Requestor information. This information is copied forward from the RFP document.



    b. Select the **Templates** tab.
    c. In the Vendor List field, select a valid value from the list.
    d. Select **Load Vendor List**.

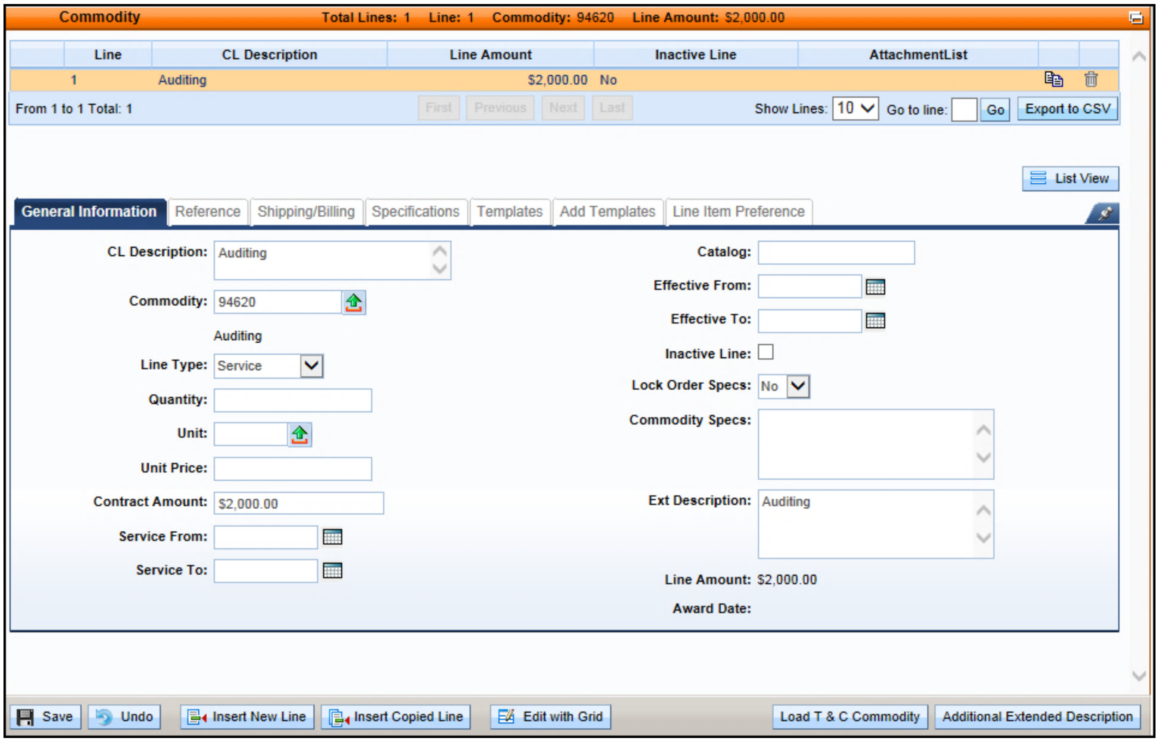


    e. On the Document Navigator, Select **Commodity**.

Another option is to manually enter vendors go to the Vendor List section of the BAFO and follow these steps:

- Select Insert New Line.
- In the Vendor field, select the picklist to select a vendor from the available vendors list, or
- Enter the **Name** of the vendor in the Vendor Contact Name field and any additional vendor information in the available freeform text fields.
- Select **Save**.
- Repeat steps above to add additional vendors.

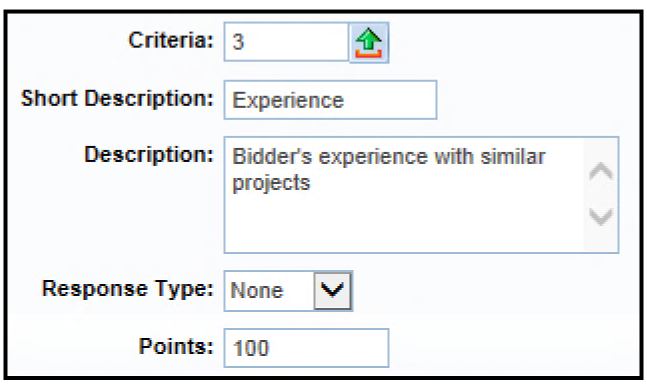
5. Verify information on the General Information tab of the Commodity section.
    a. Review the Commodity information. This information is copied forward from the RFP document.



b. On the Document Navigator, Select **Evaluation Criteria Line**.

6. Enter information in the Evaluation Criteria Line section.

   a. Select the **Insert New Line** button.
   b. Select a value from the Criteria pick list.
   c. Enter a value in the Points field.
   d. Select **Save**.



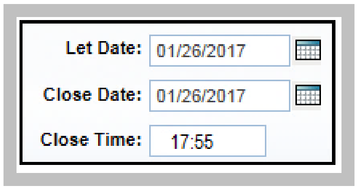
   e. On the Document Navigator, Select **Publishing**.

7. Enter information in the Publishing section.

   a. Verify that the **Create Vendor Notification** check box is selected. This must be selected in order for the email push to the vendors to function.
   b. In the Let Date field enter **today's date**. This controls when the solicitation will be published.

c. In the Close Date field enter **one week from today's date**.

d. In the Close Time field enter the time in **military time**.



8. Validate and submit the Negotiation (BAFO) document.

   a. Select the **Validate** button to check for errors. If any errors exist, correct the errors and Select the **Validate** button again. If the validation is successful, the following message displays in the upper left corner of the screen: "Document validated successfully."

   b. Select the **Submit** button to submit the document for approval after all errors are resolved. If the submission is successful, the following message displays in the upper left corner: "Document submitted successfully."

   c. Select **Close**.

   d. Select **Home**.

5. Solicitation Forms

Once users have saved their documents (RFQ, RFI, RFP, and BAFO) there are forms available that can be printed. Figure 67 shows an example of the Request for Proposal form.

Figure 67: Solicitation Form – Request for Proposals

Page 1 of 2

Request for Proposals

INTERNAL USE ONLY

Doc ID: 170000000004 Ver #: 1 Date Issued: 12/30/2016

Solicitation: RFP LOC 170000000004
Procurement Folder: 2206

Document Description: Localities RFP
Amendment:
Bids to be Accepted From: 12/30/2016
To: 01/03/2017 15:55:00

Mail Response To:	Contact Information: Name: Email:
Bill To: Localities Test Location LOCALITY LANSING MI	**Ship To:** Localities Test Location LOCALITY LANSING MI

Header Attachments:

Line #	Line Type	Commodity Code	Quantity	Unit	Description	Service From	Service To
1	Item	04030	25.00000	Each	Dogs, All Types		

Extended Description:
25 German Shepard Dogs

FOB:
Delivery Date:

Evaluation Criteria

Group 1: Default

Criteria	Description

Print Solicitation Forms

The following steps can be followed to print a form:

1. Save your document.
   a. Select the **View PDF** button at the bottom of the page.
   b. Once the Generating PDF action completes, the View Forms page will display.
   c. From the View Forms page, select the **View PDF** hyperlink for the form to be printed.
   d. The form will be displayed in PDF format to be printed to the users local or network printer.