TAMAYA
V E N T U R E S

Creating, Managing, and Awarding

Quotes, Bids and Proposals
Buyer Reference Guide


TAMAYA
V E N T U R E S
BASEC eProcurement System

Powered By: SicommNet

Quotes, Bids and Proposals can be created from an existing requisition or can be created using the process known as **Direct RFx**. In this method the buyer creates the requisition and, without pausing, turns it into a solicitation all in one step. This reference guide covers the basics of creating a **Direct RFx**, managing the solicitation while on the Internet, reviewing the vendor responses, and the award creation process.

PART 1 - Creating a Quote, Bid or Proposal (Direct RFx)

Begin by clicking on the **Create a Solicitation** icon and select the appropriate solicitation type: **Electronic (Respondable) RFQ, IFB or RFP** in the pop up window that appears. This reference guide will use an **eIFB** but the **eRFQ and eRFP** processes are essentially the same.
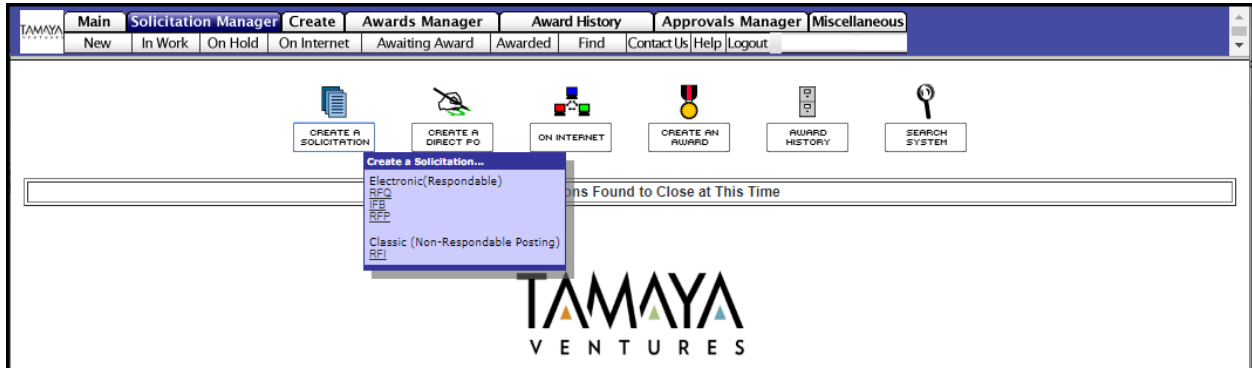
The standard **Requisition** form will appear. The upper right side will identify the type of solicitation that was chosen. Different instructions appear based on the solicitation type. The type cannot be changed later so it is important to choose the correct one in the beginning. This example shows an **eIFB Solicitation Header.**

The requisition portion of a **Direct RFx** is a 14-step process. Each step is in **RED** and linked to a short description of what information is to be placed in that area. Example:

Creating the Requisition

Step 1. Document Information. The system will assign its own internal tracking number (D number) but you may optionally enter an internal reference number or text in the space provided.

STEP 1 DOCUMENT INFORMATION

Document Date:

WED APR 22, 2020 12:16:45 PM EDT

Document No.: D2020000093

Optional Reference No.

Step 2: Contact Information and Dept Info. This shows the buyer information in the system. By default, it also lists the buyer as being the contact person for vendors. The contact information can be changed to another person. If they are system users use the Search button or just enter their information in the spaces provided. The contact person does not have to be a registered user in the system.

REQUISITIONER INFORMATION   **STEP 2 CONTACT INFORMATION**

Requested By:
DEFAULT AGENCY DEPARTMENT   Search For Agency Users:

                                             Enter a Last Name To Search By: search

Agent: Jill Cogswell   Jill Cogswell

Telephone No.: 858-222-7878   858-222-7878

Fax No.:   Contact Fax No.

Email Address: jill.cogswell@sicomm.net   jill.cogswell@sicomm.net

Step 3: Dates and Freight Information.

Step 3-1 Required Delivery Date is used for products or jobs that have a firm fixed delivery date or job completion date. Click on the **square orange box** to display a single **month** calendar. Click on the **Y** link next to it to display a **yearly** calendar. Click on the date from the calendar to insert it into the form.

Step 3-1 Length of Contract is used for a contract over a period of time for either services or goods. A **start date** and **end date** must both be selected from the calendars.

Step 3-2 Freight (Handling and Shipping charges and FOB) is applicable where the Required Delivery Date or Contract for delivery of goods is used. The standard defaults are already chosen, but additional options are available on a dropdown selection.

Step 4. Delivery Point Information.

Choose a delivery location or location where the services will be performed from the pre-built selection on the dropdown list. These selections are based on your choice of dept and buyer back in Step 2.

If the correct delivery location is not available on the list, one may be created one by selecting **Alternate Delivery Point** on the dropdown. This will open a new section where information is entered. Only the left side of this form is required (* asterisk areas) and will be used one-time for this solicitation only. Optionally filling out the right side of the form will create a permanent record in the system which will then be available for future solicitations.

Step 5. Billing Information. Choose a billing location in the same manner as in Step 4 above. Options include Create a New Billing Point, Bill to Delivery Point (the one already selected above) or Accounts Payable (the default location).

The **Manage pCard Information** button on the right is not used at this time. Its purpose is for a requisitioner to give the buyer their pCard number for use when creating an award and passing to the vendor.

Step 6. Optional Document Notes. Click on the Open button on the right to open a section where internal notes on this solicitation may be entered and saved in the system for future reference.

Step 7. SAVE ALL and GET ITEMS. Click on this button to save all information entered in previous steps. The system will check for errors or missing information and prompt you to fix the problem areas.

If there are no errors on the page this message will appear. Clicking on **OK** will complete the header information. The next step will be the selection of line items (goods or services).

<u>Step 8. Choose Commodity.</u> Enter the item (good or service) you are looking for and click GO. If a customized commodity code was previously saved it will be available for selection in My Favorites Search button. In addition, if the commodity code number is known it may be entered in the word search area.

A list of potential items will be displayed. Select the appropriate item by clicking on the **Select** button on the left. The item will be placed back into the requisition for customization. NOTE: Commodity Codes from 001 to 899 are always products and codes 900 and higher are always services. If the appropriate codes are not listed, start a new search by entering a new item and clicking **GO** again.

<u>Step 9. Quantity, Unit of Measure, Estimated Price, Document Information.</u> Enter the quantity in the field provided. The Unit of Measure is selected from a dropdown. The Estimated Price should be for the line item total. Estimated costs are not shown to the vendors. Do use commas or decimals points in this field. An additional internal reference number field is provided for the line item.

Where there are multiple quantities (2 or more), additional delivery addresses can be selected by clicking on the **Alternate Line Item Delivery Point** button. This example shows where 2 each have been split to two different locations:

Step 10. Commodity Information. The generic commodity code description is shown. Customize the item description. The description area can hold a total of 6,800 characters. A text counter displays have used as they are entered in the system.

After customizing the description, it can be saved for future solicitations. Clicking on **Yes – But Save to My Favorites ONLY** will add the description to a personal library area. Clicking on other selections will make the custom description available to all other users in the system.
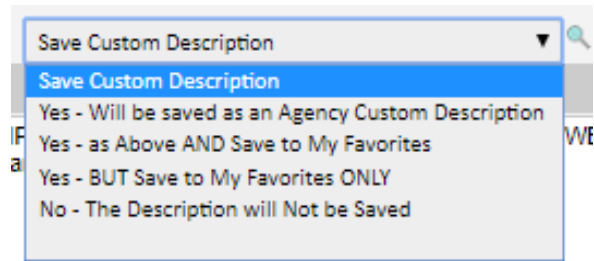
To add a **Graphic Image** to the line item, select an option from the dropdown.
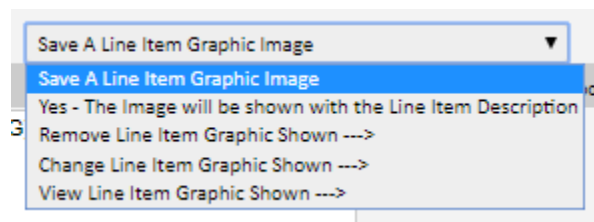
Find the image and click **Upload File**.

The image can be re-sized before saving it to the line item.

The final version of **Step 10** using all options will look like this:

Step 11: File Attachments.

File attachments at this point are generally specifications or scope of work type files. To add a file, click on the "here" link Click here to attach files.

Select the file and click on **Upload File**. A description for the file may be entered. Only one file at a time can be uploaded but there are no limits to number of files that may be uploaded and no limits to the type of file (word, excel, pdf, txt, odf, etc.) with the exception of executable files. There is no size limitation on the files, but it is recommended that files do not exceed 10 MB.

Uploaded files are shown and can be opened by clicking on the file name link. To remove a file that was uploaded in error, **uncheck the box** on the right labeled **Add to Solicitation**. Removing the check mark will remove the file when the system saves this portion of the requisition.

Step 12. Funding Information. This section is for entering accounting codes. It is currently not being used. Leave this step blank for now.

Step 13. Notes (Internal). This display the system notes and any notes previously entered in Step 6.

Step 14. Select an Action. The requisition portion is now complete unless additional line items are added. To add more line items, click on **Save Item 001 / Select Item 002**. This will save what has been completed so far and return to **Step 8** to select another commodity code and start Steps 8-14 over again for the new item. Multiple line items may be added. Each is done by creating the line item, saving it, and then starting again.

When you are finished creating the line item(s) click on **Create eIFB** (or eRFQ or eRFP if you are creating a quote or proposal). The system will check your entries and display any errors that need to be corrected.

If there are no errors the following popup will appear. Click on **OK** to continue to the creation of the solicitation.
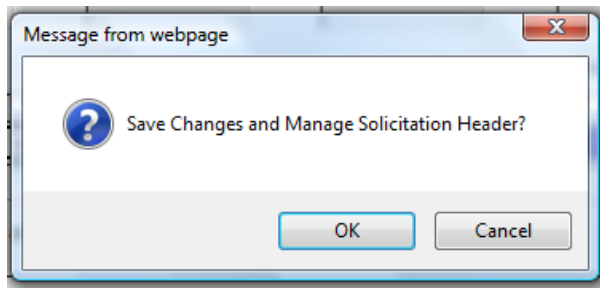
The system will check for any requisition approvals. If none are found the completed requisition is ready to be turned into a solicitation.

Results and document status are shown on the **On Internet** page.

No approval route found.
Requisition R2008001406 Created for Document D2008001657.
Assigned for Direct Solicitation creation.

Detail Item Updated
Document: D2008001657 Item: 001 Qty: 1 UOM: EA NIGP: 76004
Total Est Amnt: $75000 Item Est Amnt: $75000 Created by: abqbuyer1

Creating the Solicitation

The entire requisition is shown again to the buyer and all parts of it may be edited. The header information appears in the top of the screen and the line item information is shown in the bottom part of the screen. The line item area has its own separate view and edit buttons. Editing the line item will display the line item information in a new window. Please reference **Step 9** above. To complete the solicitation there are 3 mandatory steps and 6 optional steps.

Step 1. Solicitation Release Information. This step contains 8 parts as follows:

Item Response – this tells the vendors how they must respond. Select either **All or None Items Response** or **Individual Items Response**.

Select Solicitation Recipients – The system defaults to **All Registered Vendors** but you may choose to limit competition using the other selections.

The dropdown selection shows these options:

Agency Domiciled Vendors – this will limit email notification and access to those vendors located in Bernalillo County.

Targeted Vendors – this will open a function to choose specific vendors to receive notification and have access to the solicitation. No other vendors can participate in the solicitation.

POPULATE BY:			
Vendor Name:			
OR			
Select from a Certified List:	CERTIFIED VENDOR LISTS ▼		
OR			
Select from a Targeted Vendor List:	TARGETED VENDOR LISTS ▼		
OR			
Business Type: Toggle All: ☐		☐	Small Disadvantaged Business
		☐	8(a) Program Participant Firm
		☐	Emerging Business
		☐	Tribal Government
		☐	Foreign Supplier
Diversity Categories 51% or more Ownership Toggle All: ☐		☐	Minority Owned
		☐	Woman Owned
		☐	Veteran Owned
And/Or sub type of: Diversity Category Toggle All: ☐		☐	Hispanic
		☐	Asian American
		☐	Asian Pacific Islander
		☐	African American
		☐	Native American

Create Targeted Vendor List for Solicitation D2008001657 Commodity: 76004

City of Albuquerque A00000000051
1 Civic Plaza
Albuquerque NM, 87102

Toggle All: ☐		☐	Service Disabled Veteran
		☐	Vietnam Veteran
AND / OR			
City State, Zip:		Please select a State ▼	
County:		Click for Counties / Cities review: ○	

Check to search all Vendors: ☐
(Leave unchecked to search City of Albuquerque Registered Vendors)

[Get Selected Vendors]   [Close]

Targeted Email Notification - Click on the **Review Above Recipients** button to open a view of the vendors who were selected to get email notification based on the commodity code selected at the requisition stage.

Suppliers of Commodities:
76004,
760, 76000

[Add 76004 to Vendor]   [Print]   [Close]

Vendor Name	Vendor ID
HAWAII VENDOR	P00000000002
HAWAII VENDOR 1	P00000000003
HAWAII VENDOR 3	P00000000005
HAWAII VENDOR 3	P00000000004

To add additional vendors, click on the **Add (commodity code nbr) to Vendor**. Search and select the vendor to add them to the email notification list. A vendor must be registered in the system.

Solicitation Email Date – this is automatically defaulted to today's date but is dependent upon approvals. Changing this date is a way to schedule a future release of the solicitation.

Solicitation Responses Due – Using the calendar, select a date for the solicitation close. All solicitations automatically close at 5:00pm but can be changed by choosing another time from the dropdown selection.

Solicitation Header File Attachments – this is another area where more files can be attached. The first files that were attached were in the line item area (specifications, scope of work). These display in the header and are more commonly used for terms and conditions or documents that apply to all line items in general.

Review Standard Files for Inclusion – Standard files are pre-loaded by the administrator. By default, Standard files are not attached to the solicitation as indicated by the "No" status under the On RFQ column header. To attach the file to the solicitation, click "No" to toggle the status to "Yes".

Required Delivery Date, **Length of Contract**, and **Freight** are copied over from the requisition stage and are presented here for review and edit if necessary.

Step 2. Billing and Shipping Locations. This information is copied from the requisition stage and is displayed for review and edit if necessary.

Step 3. Solicitation Vendor Instructions. Mandatory and Optional instructions are shown. To add a optional instruction **check the box** on right side. A space is available to enter in any additional instructions not already in the pre-built instructions.

Review / Edit Solicitation Vendor Instructions 🔍 STEP 3

Solicitation Instructions
Mandatory Instructions are automatically included on the Solicitation

Mandatory	Instruction(s)
*	CITY OF ALBUQUERQUE GENERAL INSTRUCTIONS, TERMS AND CONDITIONS: The City of Albuquerque General Instructions, Terms and Conditions are hereby incorporated by reference into this solicitation as if set forth herein in their entirety. Click here to view: [Link] If you do not have internet access, you may contact the Purchasing Office at (505) 768-3320 to obtain a copy. The General Instructions, Terms and Conditions apply to this solicitation and to any contract resulting from this solicitation. Failure by an offeror to review these instructions/provisions shall in no way constitute or be deemed a waiver by the City of its contents, or any part of them. No liability will be assumed by the City for an offeror's failure to consider the General Instructions, Terms and Conditions in its response to the solicitation.
*	Additional instructions/provisions are attached which apply to this solicitation. The Specifications attached shall control over any instructions/provisions on this page and the General Instructions, Terms and Conditions referenced above
*	ELECTRONIC RESPONSE: Unless otherwise specified, this solicitation must be responded to electronically by submitting the required information and uploading any required documents as instructed below or in the attached documents. No other method of delivery will be permitted unless an exception has been approved in writing by the City Purchasing Officer at least five business days prior to the deadline for receipt of offers. The individual submitting the offer certifies that he/she is authorized to submit the electronic response for the offeror. The offeror understands that it has an obligation to, and accepts responsibility for, safeguarding the vendor user ID and password against unauthorized use and that the City has the right to rely on the authenticity of any offers submitted through the vendor user identification ("ID") and password. The offeror understands that an offer submitted electronically has the same force and effect as an originally signed document and that it is bound by any offer submitted electronically through the vendor user ID and password.
*	Explanations: Any questions regarding this solicitation must be directed, via email or phone, to the Buyer listed above at least 10 consecutive days prior to the deadline for receipt of offers, unless otherwise provided in the solicitation documents. Oral explanations or instructions given prior to the opening of offers shall not be binding. Any official explanations must be issued, in writing, by the Purchasing Division.
*	Pricing: Total price must include all applicable taxes, licenses, registration, insurance, bonds, permits, freight and fees.
*	Shipping: Prices must be stated as FOB-Destination, unless otherwise indicated in the Specifications. eRFB
*	Gross Receipts Taxes: An offeror shall include any applicable gross receipts taxes in its offered price, unless otherwise specified in the solicitation documents, and such offer will be construed in that manner. If requested, the City will furnish a non-taxable transaction certificate. Determination of whether the tax is due and payment of the tax is the responsibility of the Offeror. Applicable taxes are to be included in each invoice due and may not be billed more than sixty (60) days after providing the goods or services to which the taxes apply.

Optional	Instruction(s)
☐	This solicitation is issued on behalf of the Albuquerque/Bernalillo County Water Utility Authority by the City of Albuquerque. All references to the City of Albuquerque in this solicitation and related documents shall be construed to apply to the Authority only.
☐	Contract Term: A contract resulting from this solicitation shall be for a term of twenty-four (24) months from the date of issue of the purchase order unless otherwise specified in the solicitation documents.
☐	Contract Term: A contract resulting from this solicitation shall be for a term of twelve (12) months from the date of issue of the purchase order unless otherwise specified in the solicitation documents.
☐	Contract Term: A contract resulting from this solicitation shall be for a term of eighteen (18) months from the date of issue of the purchase order unless otherwise specified in the solicitation documents.
☐	Any contract resulting from this solicitation may be extended for an additional twelve-month period, or any part of a twelve-month period by mutual written agreement between the City and the contractor.
☐	Any contract resulting from this solicitation may be extended for an additional 24-month period, or any part of a 24-month period by mutual written agreement between the City and the contractor.
☐	Line items must be bid as specified, including container size, packaging, quantity, and units as noted in the bid schedule. Any line item deviating from the Specification will not be considered for purchase.
☐	Estimated Quantities Not an Order: The estimated quantities listed do not constitute an order and are not necessarily comprehensive; they are a representative sample of what is likely to be purchased during the course of a contract resulting from this solicitation. These quantities should not be perceived to be a commitment to purchase any quantities or amounts and will be used only to evaluate offers and award a contract. These quantities as stated may increase or decrease depending on the actual needs of the City. Actual orders will be placed by the City departments.
☐	Award will be ALL-OR-NONE based on the grand total of extended unit prices bid. If not all items are bid by any offeror, those bids for the most items may be considered.
☐	Award will be based on extended unit prices bid by groups of line items.
☐	Award will be based on extended unit prices bid by line item.
☐	Award will be based on extended unit prices bid, and may be awarded by line item, groups of line items or total of line items, whichever is determined to be in the best interest of the City.
☐	The City reserves the right to make multiple awards as a result of this solicitation if doing so may be advantageous to the City.
☐	The City intends to make multiple awards as a result of this solicitation.

Additional Instruction (if entered will be displayed)

Optional Solicitation Sections

The following 6 optional functions are available:

OPTIONAL SOLICITATION SECTIONS

Review / Edit **Contact and Buyer Information**

Review / Edit **Header Notes**

Establish / Review / Edit **Solicit Responses From Other Commodity Suppliers** 🔍

Establish / Review / Edit **Optional Solicitation Title and Description** 🔍

Establish / Review / Edit **Pre-Bid Conference** 🔍

Establish / Review / Edit **Questions / Answer Section** 🔍

Option 1. Contact and Buyer Information. This information is copied from the requisition stage and is displayed for review and edit if necessary.

Review / Edit Contact and Buyer Information

Contact Person: ABQ BUYER1	Email Address: jberan@sicomm.net
Phone Nbr: 800-555-1212	Fax Nbr: 800-555-1213
Enter a Last Name To Search By: [search]	
Buyer: ABQ BUYER1	Email Address: jberan@sicomm.net
Phone Nbr: 505-555-1212	Fax Nbr: 505-555-1213

Option 2. Header Notes. A view of system generated notes and buyer entered internal notes is shown. Additional internal notes can be added.

Review / Edit Header Notes

NOTES ARE FOR INTERNAL USE ONLY

Mon Nov 08 12:40:11 GMT-0800 (PST) 2010
No approval route found.
Requisition R2008001406 Created for Document D2008001657.
Assigned for Direct Solicitation creation.

Detail Item Updated
Document: D2008001657 Item: 001 Qty: 1 UOM: EA NIGP: 76004
Total Est Amnt: $75000 Item Est Amnt: $75000 Created by: abqbuyer1

Mon Nov 08 10:22:34 GMT-0800 (PST) 2010
Direct eRFB Solicitation Document: (D2008001657) created by: abqbuyer1
Optional internal notes used by staff - notes are not seen by vendors
Document Created for Department PRD
User: osdcja:CHRIS ARCHULETA:jberan@sicomm.net
View Full On-Disk Notepad

Document Header Notes

Option 3. Solicit Responses From Other Commodity Suppliers. Additional vendors from different commodity codes related or similar to the previously chosen at the requisition stage can be added to the email notification.

Establish / Review / Edit Solicit Responses From Other Commodity Suppliers 🔍

| Commodity Codes: | | <--- Clear Commodities | **Approximate** Batch Emails: **4** |
| Search: ☐ | Use the Search Button and select up to 5 Commodity Suppliers(other than the Line Item Commodities) from whom to solicit responses | | |

Click on **Search** to open the commodity code search area. Enter a word search and then **Select** the commodity codes to add to the solicitation. Up to a maximum of 5 additional codes can be selected.

| Find Commodity: Backhoe | (press Enter to continue)   Find: Ctrl F |

Select	Class	Item	Description
○	760	03	BACKHOE (ROAD BUILDING)
○	929	33	BACKHOE CRANE MAINTENANCE AND REPAIR SERVICES
○	765	09	BACKHOE CRANES
○	975	08	BACKHOE RENTAL OR LEASE, FARM
○	975	66	BACKHOE RENTAL OR LEASE, ROAD AND HIGHWAY
○	929	04	BACKHOE, FARM TYPE, MAINTENANCE AND REPAIR
○	760	04	BACKHOE/LOADER COMBINATION
○	020	02	BACKHOES, FOR FARM TRACTOR

After finishing the selections, close the window and the page will display the selections and list how many additional vendors were added to the email notification system.

Establish / Review / Edit Solicit Responses From Other Commodity Suppliers 🔍

| Commodity Codes: | 02002:76509:76003 | <--- Clear Commodities | 3 of 5 Alternate Commodities Entered   **Approximate** Batch Emails: **4** |
| Search: ☐ | Use the Search Button and select up to 5 Commodity Suppliers(other than the Line Item Commodities) from whom to solicit responses | | |

Option 4. Optional Solicitation Title and Description. The Custom Title and Custom Description fields are optional. This information is used in emails to vendors and on various summary views in the system.

Establish / Review / Edit Custom Solicitation Title and Description 🔍 STEP 4

| Custom Title: | Backhoe |
| Custom Description: | |

Option 5. Pre-Bid Conference. This function will add a section on the solicitation announcing a pre-bid conference date, location, and instructions. Vendors may pre-register to attend the conference. Options are available to add vendors manually, mark whether they attended or not, and enter notes.

Choose at **Date** from the calendar. Pick a **time** from the dropdown selection. Enter a **location** or choose a pre-existing one from the library. Enter **notes** for the vendors or choose pre-existing ones from the library.

 Option 6. Questions / Answers Section. Using of this function will place a section on the solicitation where a vendor may enter questions. An email will be sent when a question is submitted by a vendor. Answers are not made available to vendors until the selected "**Answers Published**" date arrives. More explanation and functionality is provided in *PART 2 - Managing a Solicitation on the Internet.*

Click **Yes** to include the Q&A area on the solicitation.
Choose whether the name of the vendors who asked the question will be displayed to the other vendors. (**Yes or No**)
Choose the date for the **Questions Deadline** using the calendar.
Choose the date that the answers will be published using the calendar. (**Answers Published**)
Enter any **Notes** to vendors or choose them from the pre-existing library.

The creation of the solicitation is nearly complete. The final step is to release it to the internet or to approval routing. The following options are available:

Preview Vendor Selection – will show a preview of the solicitation. Since the options have not been saved yet the preview is incomplete.

Release Solicitation (number) – this will either release the solicitation to the internet or send it to approval routing. The solicitation becomes available immediately (or after approval) even though email notifications are not sent until later in the day.

File Solicitation (number) for later action – this will save the solicitation and all the options chosen and move it to On Hold status. To access the solicitation again for further editing or release go to **Solicitations Manager** tab – **On Hold** sub-tab. Click on **Manage** to open the solicitation.

Close Solicitation (number) – no action – this will cancel all actions on this solicitation. Nothing will be saved except the original requisition information and it will be necessary to start over to create the solicitation.

After clicking on **Release Solicitation**, this popup confirmation will appear. Click on **OK** to continue.

Approval Routes Checked: No Approval Route Found

Are you ready to Release Solicitation B2008000043?

Solicitation Release Date: 11/09/2010 After approvals

Press 'OK' to Release Solicitation B2008000043 to All Registered Vendors

Press 'Cancel' to make any changes.

Vendor Audience for Email Notification is: All Registered Vendors

After pressing the "OK" button below, the Vendor View of the Solicitation will be presented.
After reviewing the Solicitation, Press the "Close" Button (Top or Bottom of screen).

The system takes a snapshot of the page for historical purposes.

OK   Cancel

PART 2 – Managing a Solicitation on the Internet

This section will cover the management of the solicitation while it is on the Internet. After release, the system will display a summary of the solicitation with links to open sections of it for viewing.

Features found on the On Internet Summary page:

View RFx – Shows the buyer's internal view of the solicitation with the separate header and line item areas.

Click on **Toggle Respondees View** to see information about the vendor responses such as response date and time, IP address, and amendment acknowledgement. **Review Email Recipients** will show a list of vendors who were sent email notification. **Review Vendors who Viewed Solicitation Detail** will show a list of those that have accessed and viewed the solicitation.

Thu Nov 11 10:24:27 MST 2010			Toggle Respondees(4) View	Open All Areas	Assign/Manage pCard	Scroll Down

<div align="center">Vendors who have responded to this Solicitation</div>

Respondees to Solicitation B2008000043 current as of: Thu Nov 11 09:26:20 GMT-0800 (PST) 2010 Print Close

Vendor Name	Vendor ID	Recipient	Date Emailed	Date Accessed	Version / Acknowledged	Download IP Address
HAWAII VENDOR	P00000000002	Aloha Taylor		THU NOV 11, 2010 08:41:58 AM MST	00	70.56.150.48
HAWAII VENDOR 1	P00000000003	John Doe		THU NOV 11, 2010 08:41:58 AM MST	00	70.56.150.48
HAWAII VENDOR 3	P00000000004	John Smith		THU NOV 11, 2010 08:41:58 AM MST	00	70.56.150.48
HAWAII VENDOR 3	P00000000005	Alice Wonderland		THU NOV 11, 2010 08:41:58 AM MST	00	70.56.150.48

<div align="center">**4 Vendors** responded to this Solicitation</div>

Review 0 Email Recipients	Review 0 Vendors Who Viewed Solicitation Detail

© 1996-2010 SicommNet, Inc. All Rights Reserved.
- rfBPQIsAmendmentsList Machine: trainingv1a IP: 70.56.150.48 –   Thu, 11 Nov 2010
Agency ID: A00000000051 Dept ID: AGENCY User: abqbuyer1

Vendor View – shows the actual view of the solicitation as seen from the vendor side

City of Albuquerque
1 Civic Plaza
Albuquerque NM, 87102
Request for Bid

Thu Nov 11, 10:27:47 A.M. MST 2010
HH:MM:SS adjusted to system server hh:mm:ss

Solicitation Title: **Backhoe**

Solicitation Nbr: B2008000043	Requistion Nbr: R2008001406
Reference Number:	Document Nbr: D2008001657

IMPORTANT NOTIFICATION: You have not yet responded to this Solicitation

Solicitation Date of Issue:	Solicitation CLOSING (Due) Date:
TUE NOV 09, 2010	MON JAN 17, 2011 02:00:00 PM MST
	IN: 67 Days 3 Hours 32 minutes 47 seconds
	THIS SOLICITATION REQUIRES A RESPONSE TO ALL ITEMS

Required Delivery Date: 02/28/2011

Freight: Freight / Handling Included in Price	FOB: Destination

Delivery Address:
Name 1: Dept. of Finance & Admin Services	Address 1: Pino Yards, Bldg H
Name 2: Fleet Management	Address 2: 5501 Pino Avenue NE

Responses/Participants – displays the number of vendors who have responded to the solicitation. Clicking on the round button next to it will open an area to see vendor comments. Their names are not displayed but can be seen by going to the **View RFx** link or when doing an amendment.

RFX Nbr	Line Item	Quantity	UOM	NIGP	Short Description
	001	1	EA	76004	Backhoe/Loader Combination as per attached specifications

RESPONSES to Request for Solicitation B2008000043

Back

Response #	Response Date	Vendor Comments
1 v.00	Thu Nov 11 2010 08:41:58	
2 v.00	Thu Nov 11 2010 08:41:58	
3 v.00	Thu Nov 11 2010 08:41:58	

Response #	Response Date	Vendor Comments
4 v.00	Thu Nov 11 2010 08:41:58	

RESPONSES to Solicitation Line Item: 001   Class Members - Email/Review: ○   Class-Item Members - Email/Review: ○

Print

Creating an Amendment/Addendums

Amend – click to open the amendment process and create an addendum to the solicitation. A copy of the original solicitation is displayed that can be edited and saved. The saved solicitation will become **Version 01**. The original is always saved and preserved as it was and can be viewed by the buyer and vendors.

The system will display the solicitation as it looked when it was being created in the Solicitation Creation Steps 1-4 and Optional Steps 1-6 above. The amendment process will create an Addendum. There is a **New Step 1** in this process.

Addendum Information/Reason Text. Enter the *reason* for the addendum, not the actual addendum. This text is used in the email notification to vendors and serves to explain to the vendors where to look to see changes. After entering the reason, navigate to the appropriate place in the solicitation and make the changes.

Creating Addendum 01
On NET Request for Bid
Current Version 00 loaded

Thu Nov 11 10:39:21 MST 2010 | Toggle Respondees(4) View | Open All Areas | Assign/Manage pCard | Scroll Down

Solicitation Nbr: B2008000043 - 01
Reference Number: [   ]

Requisition Nbr: R2008001406
Document Nbr: D2008001657

MANDATORY ADDENDUM REASON SECTION

Review / Edit **Addendum Information**   🔍 STEP 1

Solicitation Addendum 01 / CHANGE REASON TEXT (displayed on solicitation)

```
Adding revised specifications - Addendum A in the line item area.
Extending closing date for this solicitation an additional 2 days.
```

View Past Addendums
Current Ver.00
Addendum Reason:

To make changes in the line item area, go to the bottom of the screen. The line item has its own amend section. Click on **Amend** button to open this area. The process will be the same and when the line item was originally created in Requisition Steps 9-14 above.

To release the amended solicitation, click on the **Release Amended Solicitation** (Number) button. If the **Save for Future Release** button is selected the solicitation will move to **Solicitation Manager** tab – **On Hold** sub-tab and vendors trying to access it will get a message that it is offline for editing and that they will be notified by email when it is available again.

The amended solicitation does not go through approval routing again at this time.

After release, the **On Internet** page will reappear and a summary of the actions is displayed.

Remove Solicitation from the Internet

Remove – is where the solicitation can be deleted/canceled, restaged for editing and re-release, or closed for award. Clicking on the **Remove** link will start the process. A popup window confirmation will appear. Click on **OK** to continue.
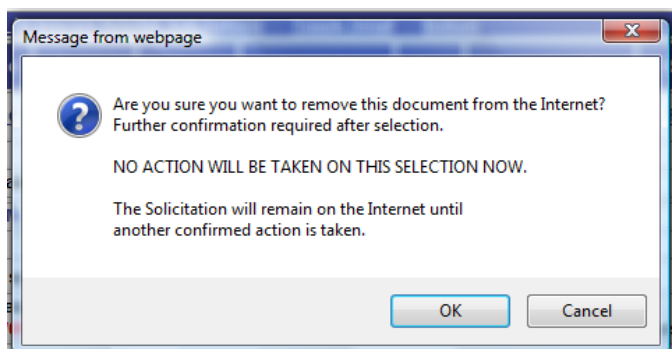
To notify vendors of this action fill out the email portion first, then click on the appropriate button on the bottom. Leaving the email blank will make the changes but not notify vendors. The buttons initiate the following actions:

Permanently Delete This Solicitation – the solicitation will be removed form the internet and deleted. It can be found again in deleted history area.

Stage this Solicitation for re-release to On Hold – the solicitation will be removed from the internet and placed in **Solicitation Manager** tab – **On Hold** sub-tab. *All vendor responses will be permanently deleted*. The solicitation can be edited and re-released.

Cancel Remove Action – will stop this process and return to the On Internet page.

Temporarily take this Solicitation offline – the solicitation will be removed from the internet and placed **On Hold**, but the vendor *responses will not be lost*. It can be edited and re-released. Vendors attempting to access the solicitation will get a message that it is offline and will be available later.

Close for Award – the solicitation can be closed immediately and moved to **Awards Manager** without regard to the published closing date.

Type (RFQ/IFB/RFP) link – will replicate the solicitation and place it **On Hold** for editing and release. The following messages will appear:
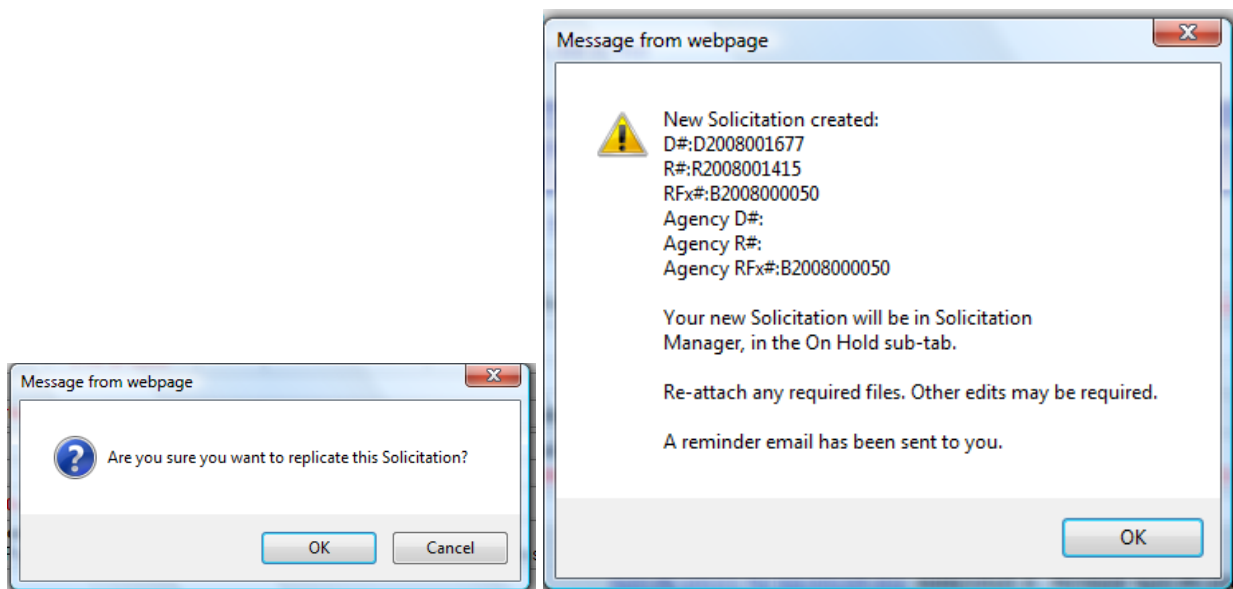
Solicitation Number – will open a process to re-email vendors the solicitation notification.

Email Information for Solicitation: Q2011000406		
Vendors registered for commodities: 1516		
Email Audience:	HI domiciled vendors only, same on BidBoard	
	Last Date	Total All Sent
Emails sent:	Fri Nov 05, 2010	940
	Re-email solicitation in tonights Batch	
	Discrepancies in number registered and number sent represents constraints of limited competition if applicable, test/invalid accounts, multiple vendor employees registered for like commodities, vendor status with the Agency and vendors who have already responded.	
Commodities Solicited:	91006,910,91000	
	Review by vendor minority business class	

Requisition Number – displays the requisition information.

City of Albuquerque
1 Civic Plaza
Albuquerque, NM 87102

Requisition Header (For Purchase)

This Requisition was forwarded from Department: PRD.

Document Date: Mon Nov 08 2010 | Approval Routes | Past Version Reasons | Assign/Manage pCard | Scroll Down | Duplicate Document

OPTIONAL SOLICITATION TITLE: Backhoe
OPTIONAL SOLICITATION DESC:

Solicitation Nbr: B2008000043 - 01   Item Number: 000
Requisition Nbr: R2008001406   Item Number: 000
Document Nbr: D2008001657   Confirming Nbr :
Reference Nbr: Assigned By:

View Past Addendums
Current Ver. - 01   Adding revised specifications - Addendum A in the line item area.
Addendum Reason: Extending closing date for this solicitation an additional 2 days.

Required Response Date: 01/19/2011   Required Delivery Date: 02/28/2011

Freight: Freight / Handling Included in Price   FOB: Destination

Billing Address: AccountsPayable [View]   Delivery Point: FLEETPINO [View]

Document Number – opens the Document Status Review area showing a history of the document and current status information.

Items link – opens a review of the line item description.

Current Version – 00 means it is the original solicitation. When amendments are released this will change to 01, 02, etc. The version number will be a link that will open previous versions of the solicitation.

NIGP/Description – shows the NIGP code used and the Title of the solicitation.

NIGP / Description:	76004: Backhoe

For Dept – shows the department and buyer you are procuring on behalf of.

For Department:	This Solicitation was created for Department: Parks & Recreation Department	Buyer: CHRIS ARCHULETA

Solicitation Closes – shows the closing date and time.

Solicitation Closes:	Wed Jan 19 2011 2:00 PM

View Invitation List – this opens a window that displays all the vendors who received the email notification for this solicitation. As amendments are released, the list adds those names as well as any new vendors who had registered recently and are now getting this email notification.

View Invitation List:	Click here to view Vendor Recipients of this Solicitation and all of its Addendums

Thu Apr 23 12:56:33 GMT-0700 (PDT) 2020
Invitation List for Solicitation Q2020000004

RELIABLE OFFICE SOLUTION	jeff ESHELMAN	RIVERSIDE, CA
Corporate Express	Bill Clarkson	San Diego, CA
SYSCO Food Services of Idaho (3)	Melody Morton	Boise, ID
Grainger	Kristen Leone	Dallas, TX
Dennis paper and foodservice (5)	Tom Gagne	Bangor, ME
C&H DISTRIBUTORS, LLC	STEVE MAKOVEC	MILWAUKEE, WI
O REILLY AUTO PARTS (7)	DOUG BENNETT	SPRINGFIELD, MO
DXP-SEPCO INDUSTRIES	Keith Smith	CONROE, TX
Butler Bros. (9)	Patrick Butler	Lewiston, ME
Gray Automotive Products	Sissy Wilson	Saint Joseph, MO
Performance Foodservice-NorthCenter (11)	Ray Albert	Augusta, ME
Paris Farmers Union	Herky Card	South Paris, ME
CPI International (13)	Donna Wells	Santa Rosa, CA
Supelco - Division of Sigma-Aldrich	Vicki Dillman	Bellefonte, PA
Thomas Scientific (15)	John Hughes	Swedesboro, NJ
data essentials,inc.	DAVID HILL	kansas city, MO
Budget Document Technology (17)	Tom Ouellette	Lewiston, ME

Pre-bid Conference

Click on the View Registered Attendees box to open a window that displays the vendors who have signed up to attend. You may also enter vendors or yourself/ staff as attendees. After the conference is over you may open this area again and mark whether or not the vendors attended, add additional attendees, and save notes about the attendees.

Questions and Answers

Click on the link **Click here to review or respond to Vendor Questions.** The questions from vendors are displayed in a field and followed by another field for answers. Agency questions may be entered. Click on the **Save Answers.**   Answers may be entered up to closing time on the day of the scheduled answers published date. Email notification that answers are available will go out late in the evening of the publish day. If all questions are not answered by the publish date vendors will get an email that the Answers have been delayed. The buyer will get a reminder email that all answers were not completed. The publish date for answers will be extended for one day.

The questions may be passed to another person for answering by using the **Assistance** feature. Put a **check mark** next to the question being passed and then click on the **Email Requests For Assistance** button below the last question.

A confirmation will appear. Click **OK**.
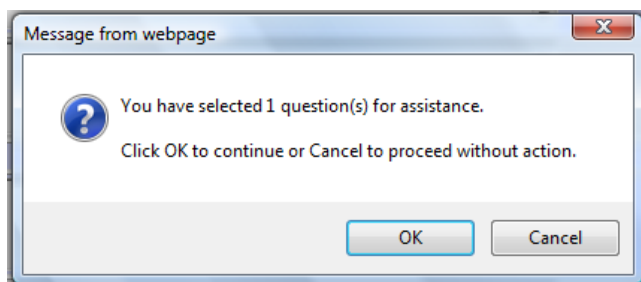
Enter the email of the person receiving the questions. Click **Send Request For Assistance.** The system will send an email to this person with a link to open the system and enter the answer(s). A confirmation email will be received when the answers are completed.

Buyer Question Manager for Solicitation B2008000043		
Questions received from City of Albuquerque		
Nbr	Question	Entered
1	Why is the sky blue?	11/10/2010
1 total questions found		
Email Request For Assistance to:		

Send Request For Assistance   Cancel

Solicitation Files (header and Line Items files) – has a link to open any files uploaded to this solicitation.

Solicitation Files Attached:	Header: instructions.doc	
Item 001:	Specifications for backhoe5.doc	Specifications for Backhoe
	Specifications for backhoe6.doc	Addendum A - Revised Specifications

Other Solicited Commodities – if used this section shows the additional commodity codes chosen.

Other Solicited Commodities:	In Addition to the Line Item Commodities: Vendors providing Commodities 02002;76509;76003 are solicited for response.

PART 3 - Viewing Vendor Responses

The solicitation results may be viewed right after the closing date and time. If it is not opened the same day a reminder email that the solicitation has closed is sent in the evening.

Open the closed solicitation by clicking on **Awards Manager** tab – **Abstracts (RFx Type)** sub-tab or by clicking on the **Create an Award** icon and choosing the **solicitation type**.
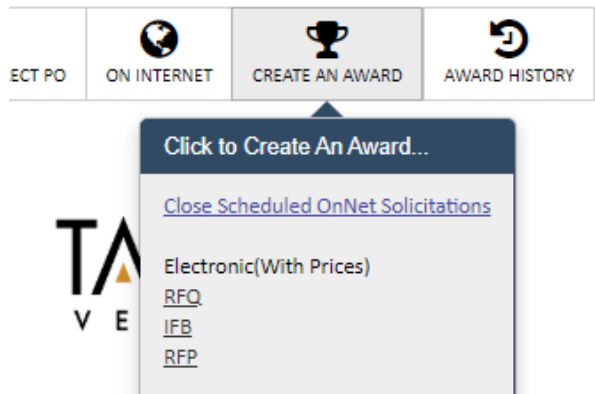
The available Abstracts (vendor responses) for that type of solicitation will be displayed in a list.

The bottom of the screen is a list of abstracts. It shows:
- Solicitation number
- Delivery date
- Options to view the responses: lump sum, line item, targeted vendor list (TVL) – Close for Award
- Number of responses
- Line items (available and already awarded)
- Close Date
- Commodity Code
- Short Description

Abstract:

34

Move to On Hold/Delete/Hidden

Next to the Number of Responses are 3 **check boxes**. The first one is for moving the solicitation to **On Hold** for re-bidding. *If chosen, all vendor responses will be lost.* The second box will **Delete** this solicitation. If chosen an area to enter a reason will appear and will be tracked in the deleted history area. The upper portion of the screen is an optional email to notify vendors of actions in deleting or re-bidding this solicitation. If either of these two options is chosen, the email needs to be filled out first. The third box allows solicitations to be hidden from view.

To use the **On Hold** or **Delete boxes**, check the ones to be moved and then click on the button **Move Selected Solicitations to On Hold/Delete.** Confirmation popup messages will appear. Click on **OK** to proceed.

To use the **Hidden box,** check the button that says **Hide and click on the solicitation type located in the menu frame**. This will automatically hide solicitation from view. This function can be reversed by selecting **Show Hidden** from drop down.

Below is a screen of view once document has been hidden.

To display hidden document, select Show Hidden from the drop down.

To restore hidden solicitation simply uncheck selection box and your solicitation will be restored.

View Vendor Responses

To continue with viewing the vendor responses, click on **Lump Sum (LS)** button to display the vendor responses. **Line Item (LI)** button is only available if there are multiple line items on the solicitation. **TVL (targeted vendor list)** is only available if a targeted list was created when releasing the solicitation to the Internet.

Vendor responses are listed from lowest cost to highest cost. Preference calculations have been prebuilt into the system and also show on the abstract where applicable.

The following buttons are located in the header area of the abstract:

Agency Attachments – shows a list of all the attachments used on the solicitations and shows whether or not the vendor opened and viewed the attachments.

Header Level Attachments For Solicitation B2008000043 Addenda 01		Detail
Header Level Attachments	**Description**	
instructions.doc	General informations	

Links To Specific Vendors for Header Attachment Status:
HAWAII VENDOR
HAWAII VENDOR 1
HAWAII VENDOR 3
HAWAII VENDOR 3

Header Level Attachments For Vendor HAWAII VENDOR Header Top	
Filename	**Last Viewed Attachment Status**
instructions.doc	VENDOR DID NOT VIEW ATTACHMENT

Header Level Attachments For Vendor HAWAII VENDOR 1 Header Top	
Filename	**Last Viewed Attachment Status**
instructions.doc	VENDOR DID NOT VIEW ATTACHMENT

Header Level Attachments For Vendor HAWAII VENDOR 3 Header Top	
Filename	**Last Viewed Attachment Status**
instructions.doc	VENDOR DID NOT VIEW ATTACHMENT

Header Level Attachments For Vendor HAWAII VENDOR 3 Header Top	
Filename	**Last Viewed Attachment Status**
instructions.doc	VENDOR DID NOT VIEW ATTACHMENT

Detail Level Attachments For Solicitation B2008000043 Addenda 01 Line Item 001		Header
Detail Level Attachments	**Description**	

Links To Specific Vendors for Detail Attachment Status:
HAWAII VENDOR
HAWAII VENDOR 1
HAWAII VENDOR 3
HAWAII VENDOR 3

Specifications for backhoe5.doc	Specifications for Backhoe

Line Item View – sorts the responses in a table format

ITM	Qty/UOM	NIGP/Descr	Vendor Prices				
			HAWAII VENDOR P00000000002	HAWAII VENDOR 1 P00000000003	HAWAII VENDOR 3 P00000000004	HAWAII VENDOR 3 P00000000005	
1	1 EA	76004 Backhoe/Loader Combinatio	$18.92 ($18.92)	$52.30 ($52.30)	$66.19 ($66.19)	$93.15 ($93.15)	

Document Status Report   Sorted by Line Item Amount View   Print   Back

Pre-Bid Conference – displays the list of pre-bid conference attendees

City of Albuquerque Solicitation B2008000043 Pre-Bid Conference Registered Attendees					
Company Name	**Attendee Name**	**Attendee Title**	**Attendee Phone**	**Attendee Email**	**Attended**
123 Company	Michael Anderson	President	800-555-2222	email@email.com	Yes
ABC Company	Andrea Johnson	Sales Manager	800-555-1111	email@email.com	Yes
Attendee Notes: Will attend					
XYZ Company	John Smith	Regional Manager	800-555-1222	email@email.com	Yes

<center>[Close]   [Print]</center>

Assign/Manage pCard – not used at this time

Vendor Response Tracking – shows information about the vendors response (date, time, IP address, addendum acknowledgement)

Vendors who have responded to this Solicitation

Respondees to Solicitation B2008000043 current as of: Thu Nov 11 15:39:48 GMT-0800 (PST) 2010 [Print] [Close]

Vendor Name	Vendor ID	Recipient	Date Emailed	Date Accessed	Version / Acknowledged	Download IP Address
HAWAII VENDOR	P00000000002	Aloha Taylor	THU NOV 11, 2010 10:09:01 AM MST	THU NOV 11, 2010 08:41:58 AM MST	00	70.56.150.48
HAWAII VENDOR 1	P00000000003	John Doe	THU NOV 11, 2010 10:09:01 AM MST	THU NOV 11, 2010 08:41:58 AM MST	00	70.56.150.48
HAWAII VENDOR 3	P00000000004	John Smith	THU NOV 11, 2010 10:09:01 AM MST	THU NOV 11, 2010 08:41:58 AM MST	00	70.56.150.48
HAWAII VENDOR 3	P00000000005	Alice Wonderland	THU NOV 11, 2010 10:09:01 AM MST	THU NOV 11, 2010 08:41:58 AM MST	00	70.56.150.48

4 Vendors responded to this Solicitation

<center>[Review 4 Email Recipients]   [Review 0 Vendors Who Viewed Solicitation Detail]</center>

© 1996-2010 SicommNet, Inc. All Rights Reserved.
- rfBPQlsAmendmentsList Machine: trainingv1a IP: 70.56.150.48 –   Thu, 11 Nov 2010

Question/Answer Section – display the questions and answers from the solicitation.

Buyer Question Manager for Solicitation B2008000043 - Close Date/Time: WED JAN 19, 2011 02:00:00 PM MST		
[Help] [Show Current Settings]		
Questions received from City of Albuquerque		
Nbr	**Question**	**Entered**
1	Will you extend the closing date for bid submittal?	11/10/2010
Agency Modification	Will you extend the closing date for bid submittal?	
Answer 1	No	11/10/2010
2	Do you want to buy a trailer also?	11/10/2010
Agency Modification	Do you want to buy a trailer also?	
Answer 2	Not at this time	11/10/2010
3	Why is the sky blue?	11/10/2010
Agency Modification	Why is the sky blue?	
Answer 3	Don't know	11/10/2010

<center>[Print]   [Close]</center>

Each individual **vendor name** on the abstract is a link that displays information about the vendor.

Vendor Information	Bigger Smaller
Award History:	○
Commodities:	○
Vendor Notepad:	○
Self-certified profile entries:	○

Enterprise Information

Enterprise ID:	P00000000002
Enterprise Name 1:	HAWAII VENDOR
Name 2:	
Name 3:	
Enterprise Address 1:	123 Aloha Street
Address 2:	
City:	ALBUQUERQUE
State:	NM
County / Parish:	BERNALILLO
Zip Code:	87102
Country:	USA
SSN or Fed ID:	xx-xxx4433

Vendor certifications, if available, can be viewed by clicking on the link **Vendor Certifications**.

Vendor uploaded **attachments** will be shown as links that can be opened and saved.

The bottom of the abstract has a link that captures all of the vendor response information on the page and displays/saves it in an Excel format (csv).

A temporary Excel format document has been written. Click here to access it.

A **Document Status Report** button is also available on the bottom of the abstract and show the status of the documents for this solicitation.

		P-Days	NP-Days	To/Start Date	From/End Date	Processing Phase
Agency:	AGENCY					
Document Number:	D2008001657(1)	1	0	11/08/2010 11:22:34	11/08/2010 11:22:34	Document Created
	R2008001406					NO REQUISITION APPROVALS
	B2008000043(1)	1	0	11/11/2010 11:09:01	11/11/2010 11:09:01	Solicitation Created
				11/11/2010 11:09:01		RELEASED TO INTERNET
Status:	Awaiting Award				01/19/2011 02:00:00	CLOSED - AVAILABLE FOR AWARD
Description:	Backhoe					AWAITING AWARD
Notepad:	View					
File Attachments:	View					
Vendor:	Pending					
Type:	Requisition > Solicitation					
Buyer:	ABQ BUYER1					
Value:	Estimated: $75,000.00					
Responses:	View Vendor Responses					
Snapshots:	View Vendor Snapshots					
Invitation List:	Pending - In Run Queue					
Req Recvd:						
PO Mailed:	Pending					
Closed Date:	01/19/2011 02:00:00	On Internet Dates:	11/11/2010 11:09:01 - 01/19/2011 02:00:00			

Document Status Report

Full view of Abstract:

City of Albuquerque
1 Civic Plaza
Albuquerque, NM 87102

0

LUMP SUM Abstract of Responses for Solicitation #B2008000043 - 01

Click here to attach a post award file to this solicitations header.
This file will be viewable by vendors from the abstract solicitation view after award.

| Solicitation Optional Title: | Backhoe |
| NIGP Nbr: 76004 | Abbreviated Desc: Backhoe/Loader Combination as per attached specifications |

Delivery Date	Email Date	Due Date	Solicitation Line Items	Requisition Nbr
Mon Feb 28 2011 00:00:00	Thu Nov 11 2010 11:09:01	Wed Jan 19 2011 14:00:00	1 TOTAL	R2008001406

Estimated Price: $75000

| Agency Attachments | Line Item View | Pre-Bid Conference | Assign/Manage pCard | Federal Excluded Parties List |
| | | Vendor Response Tracking | Bottom Of Page | |

| Question/Answer section: | Click here to review Vendor Questions Questions Deadline: 12/01/2010   Answers Due Date: 12/07/2010 |

Toggle All Switches

Award /	Price	Pymt Terms	Pymt Text	Discount Price ○	LABP Price LAB: -0.05	Bernalillo Not Small Business	Trans Date	Trans Time
Award: ○	$18.92	0		18.92	17.97	18.92	Thu Nov 11 2010	08:41:58
Vendor: HAWAII VENDOR P00000000002 Vendor Certifications							FedID: XX-XXXX433 IP Addr: 70.56.150.48	

Response Version: 001: 00
Line Item Prices: 001: 18.92 (18.92)
Recycle Status: 001: Recycled
Vendor Comments:
Attached Files:
Buyer Comments:

Solicitation: B2008000043

Award /	Price	Pymt Terms	Pymt Text	Discount Price ○	LABP Price LAB: -0.05	Not Bernalillo Not Small Business	Trans Date	Trans Time
Award: ○	$52.30	0		52.30	52.30	52.30	Thu Nov 11 2010	08:41:58
Vendor: HAWAII VENDOR 1 P00000000003 Vendor Certifications							FedID: XX-XXXX467 IP Addr: 70.56.150.48	

Response Version: 001: 00
Line Item Prices: 001: 52.3 (52.30)
Recycle Status: 001: Recycled
Vendor Comments:
Attached Files:
Buyer Comments:

Solicitation: B2008000043

Award /	Price	Pymt Terms	Pymt Text	Discount Price ○	LABP Price LAB: -0.05	Not Bernalillo Not Small Business	Trans Date	Trans Time
Award: ○	$66.19	0		66.19	66.19	66.19	Thu Nov 11 2010	08:41:58
Vendor: HAWAII VENDOR 3 P00000000004 Vendor Certifications							FedID: XX-XXXX788 IP Addr: 70.56.150.48	

Response Version: 001: 00
Line Item Prices: 001: 66.19 (66.19)
Recycle Status: 001: Recycled
Vendor Comments:
Attached Files:
Buyer Comments:

Solicitation: B2008000043

Award /	Price	Pymt Terms	Pymt Text	Discount Price ○	LABP Price LAB: -0.05	Not Bernalillo Not Small Business	Trans Date	Trans Time
Award: ○	$93.15	0		93.15	93.15	93.15	Thu Nov 11 2010	08:41:58
Vendor: HAWAII VENDOR 3 P00000000005 Vendor Certifications							FedID: XX-XXXX644 IP Addr: 70.56.150.48	

Response Version: 001: 00
Line Item Prices: 001: 93.15 (93.15)
Recycle Status: 001: Recycled
Vendor Comments:
Attached Files:
Buyer Comments:

Solicitation: B2008000043

An temporary Excel format document has been written. Click here to access it.

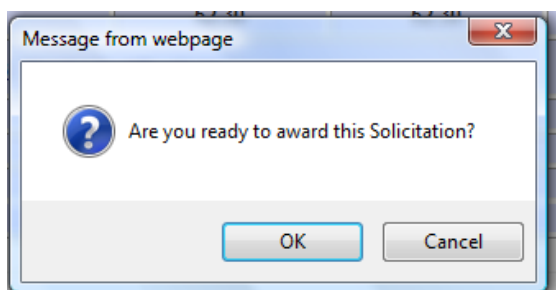| Document Status Report | Line Item View | Print | Back | Top Of Page |

PART 4 - Creating an Award

Awards can be done by lump sum (all line items to the same vendor) or by individual line item of groups of line items to different vendors. This reference guide describes the lump sum process only. For instructions on split awards or multiple awards see the supplemental guides: *How to Create a Line Item Award, How to Create a Split Award,* and *How to Create an Award to Multiple Vendors.*

After a vendor has been selected for award, click on the **Award** button on the abstract.

Toggle All Switches								
Award /	Price	Pymt Terms	Pymt Text	Discount Price ○	LABP Price LAB: -0.05	Bernalillo Not Small Business	Trans Date	Trans Time
Award: ○	$18.92	0		18.92	17.97	18.92	Thu Nov 11 2010	08:41:58
	Vendor: HAWAII VENDOR P00000000002 Vendor Certifications						FedID: IP Addr:	XX-XXXX433 70.56.150.48
Response Version: 001: 00								
Line Item Prices: 001: 18.92 (18.92)								
Recycle Status: 001: Recycled								
Vendor Comments:								
Attached Files:								
Buyer Comments:								
								Solicitation: B2008000043

Click on **OK** on the confirmation message:

The Award Input page will appear next.

To complete the award, follow these steps:
The upper left of the screen displays Agency information. The upper right is the selected vendor.

MANDATORY AWARD SECTION

Step 1. Award Type – Award Basis – Competition Type – there are 3 sub-steps in this area to complete.

Step 1-1. Award Type – choose an award type from the dropdown selections.

DEFINITE DELIVERY TYPES:
  Purchase Order (PO)
  Emergency Purchase Order (DO)

INDEFINITE DELIVERY TYPES:
  Indefinite Delivery Contract Award (IP)

Choosing a type will open the **Award Solicitations Instructions** area for review.

The **Award Instruction** area has mandatory instructions, optional instructions, and an area to add additional instructions.

Assign/Manage pCard button is not used at this time.

Step 1-2. Basis of Award. Select either Adequate Price Competition or Price Analysis from the dropdown selection.

Step 1-3. Competition Type. Choose a type form the dropdown selections: Open Competition, Limited Competition (targeted vendors list), or Sole Source.

Competition Comments: After the type is selected an area will open for explaining or entering comments on the competition. If the low bidder was not selected or limited competition was selected the system will automatically enter in some pre-built text and require that more text be entered to finish the statement.

This completes the mandatory section of the Award Input page and the award could be released for approval at this point. There are five (5) optional areas available as follows:

Option 1. Lag Days/Release Dates - Estimated Total Price - Shipping Info - Award Header Attachments

Award Release/Award Notification Release. Lag Days are a way to delay the award release until a future time.

Award pricing shows the **estimate** of the award from the solicitation compared to the **actual** award amount and can be adjusted if necessary.

Award Header Attachments – files may be uploaded to the award that will appear to the vendor. To add a file, click on **Add Award <u>Header</u> Attachment** link and follow the process the same as other file upload processes in the system.

Option 2. General Comments Area – comments can external (shown on the award to the vendors or internal (not displayed on the award).

Option 3. Line Item File Attachments. Line item attachments that existed in the solicitation can be added to the award as well as uploading new line item attachments.

Option 4.   Line Item Award Instructions / Internal Comments Area. Comments can be added to a line item, both external (seem by vendors) and internal comments (not seen by vendors).

Option 5.   Award Email Distribution. This function will send a copy of the award (email link) to a number of people already listed on the solicitation or to anyone by entering their email address in the space provided.

Review/ Edit Award

As a final step before releasing the award to the approval route click on the button to **Review/Edit Award**. The award is displayed in edit mode and many areas can be edited.

45

Attn: Sales Manager
Quoted By: John Doe
[dropdown]

End of Service Date: MM/DD/YYYY [calendar] Y
RFQ#: B2008000043
DOC#: D2008001657

Contact: **ABQ BUYER1**   800-555-1212

Buyer: **ABQ BUYER1**   505-555-1212

	On Save - Header Attachments
	contractpkg1.pdf
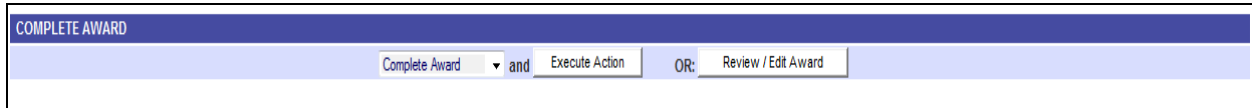
Item No	Description	Quantity UOM	Unit Price
Item **1** **Other Edits** Del: ☐	Line Item <u>Description</u> (displayed on PO): Resize Text Box: (+) (–) Characters Remaining: 7143 Backhoe/Loader Combination as per attached specifications (760-04) (NT) Not Taxable ▼ Estimated Price: **$75,000.00**	**1 EA** 1 EA	**$52.3** 52.3
	Account:		Extd Amnt: **$52.30** 52.30
999	Freight Current: **Included in Price** Change to: [dropdown] Tax status: [dropdown]	1	**0** 0
Add	Add item 2 to this PO: ○		
	Subtotal:	$52.30 52.30

State and Local Taxes (0): 0.00 / 0.00

Total: $52.30 / 52.30

General <u>Comments</u>: Resize Text Box: (+) (–)   Characters Remaining: 2000
[text box]

Header Item Public <u>Buyer</u> Entered Comment to Vendor Response(Displayed on PO):   Resize Text Box: (+) (–)   Characters Remaining: **1800**
[text box]

Header Item Internal <u>Buyer</u> Entered Comment to Vendor Response(Not Displayed on PO):   Resize Text Box: (+) (–)   Characters Remaining: **1800**
[text box]

Instructions:
Freight / Handling Included in Price
1: Notice of Intent to Award: This document is generated to create historical data for the electronic solicitation. Do not take any action. This Intent to Award notification is for informational purposes only.

This is Intent to Award notification ONLY. Do not ship against this document.
Additional <u>Instruction</u> (displayed on PO):   Resize Text Box: (+) (–)   Characters Remaining: **3800**
[text box]

Instructions:
Freight / Handling Included in Price
1: Notice of Intent to Award: This document is generated to create historical data for the electronic solicitation. Do not take any action. This Intent to Award notification is for informational purposes only.

This is Intent to Award notification ONLY. Do not ship against this document.
Additional <u>Instruction</u> (displayed on PO):   Resize Text Box: (+) (–)   Characters Remaining: **3800**
[text box]

Signed By: John J. Vigil

This PO has no approval route.

Award Changes and Award Adds **may not** be done in the same transaction. **Changes** will **not be applied** if an **Add** is done **at the same time**, and will need to be re-entered.

| Close No Action | Apply Changes | Move Deletes to: [dropdown] | Go Deletes | Print Page | Help | Reset |

<u>Review</u> New Solicitation Mandatory Inputs - Vendor<u>Notification</u> of Changes 🔍

After reviewing and editing the award click on either **Close No Action** (no changes) or **Apply Changes** (save changes). The system will return to you the previous page for final release.

To release the award, choose **Complete Award** from the dropdown and click the **Execute Action** button.

An award confirmation window will appear. Click **OK**.
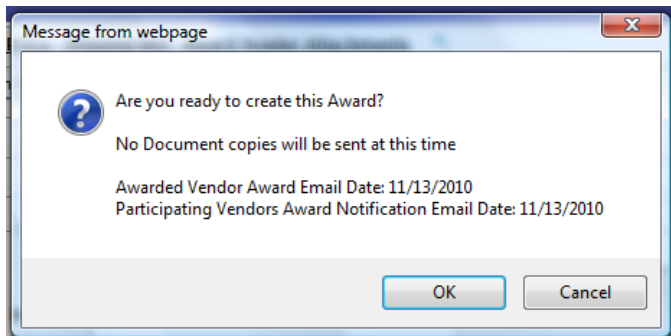
The completed award will be displayed. **Approval Route** information is found at the bottom of the award. After all approvals are completed the award notice will be sent to the vendors. An email confirmation that the approvals have been completed is sent to the buyer.

PART 5 – Approvals Manager

To track and review awards in approval routing go to the **Approvals Manager** tab. Click on the **MY PO's> In Approval** sub-tab. A list of all solicitations in approval routing will display. To see the details of the approval route click on the **Approvals** link. This will display the route and show you which approver currently has the document.

PART 6 - Accessing History

Award history is found either on the **Awards History** tab or by clicking on the **Awards History** icon. Deleted history is found under **Miscellaneous** tab – **History** sub-tab.

Clicking on **Awards Manager** tab and then **All>RFB** will display a list of awards issued from a bid.

System RFB Awards Current as of: Fri Nov 12 14:30:44 GMT-0800 (PST) 2010 Find							
Awarded To	**RFB Nbr**	**Requisition/ Document Nbrs**	**Award Nbr**	**Award Date**	**Cmdty Code**	**Short Description**	**Agency**
HAWAII VENDOR 1	B2008003907 - 01	R2008006416 D2008008295	ID2008002503 - 00	Wed Sep 15 2010	94893	Medical Waste Disposal Services as per attached scope of wor	State of Hawaii
HAWAII VENDOR 1	B2008003677 - 00	R2008005590 D2008007140	DO2008002373 - 01	Thu Sep 02 2010	null		State of Hawaii
HAWAII VENDOR 3	B2008003820 - 01	R2008006136 D2008007887	DO2008002274 - 01	Thu Sep 02 2010	07180	SUV Type Vehicles, crossover hybrid type as per attached spe	State of Hawaii
HAWAII VENDOR 3	B2008003879 - 01	R2008006361 D2008008221	DO2008002366 - 00	Wed Sep 01 2010	73042	Generators, Pulse, as per attached specifications	State of Hawaii
HAWAII VENDOR 3	B2008003787 - 00	R2008006041 D2008007764	DO2008002358 - 00	Thu Aug 19 2010	92975	EQUIPMENT MAINTENANCE AND REPAIR SERVICES FOR AGRICULTURAL,	State of Hawaii
HAWAII VENDOR	B2008003845 - 01	R2008006232 D2008008038	DO2008002317 - 00	Tue Apr 06 2010	46518	Clinical Centrifuges for use in State Laboratories. As per	State of Hawaii
Test Vendor xx	B2008003806 - 01	R2008006117 D2008007862	DO2008002262 - 00	Wed Nov 04 2009	72090	Well Pumps for commercial irrigation systems as per attached	State of Hawaii
HAWAII VENDOR	B2008003782 - 01	R2008006023 D2008007744	DO2008002229 - 00	Thu Sep 03 2009	07003	Emergency Rescue Vehicles as per attached specifications.	State of Hawaii
HAWAII VENDOR 3	B2008003684 - 01	R2008005598 D2008007151	DO2008002148 - 00	Mon May 18 2009	94620	FINANCIAL SERVICES Auditing	State of Hawaii
HAWAII VENDOR	B2008003748 - 01	R2008005817 D2008007486	DO2008002134 - 00	Thu May 07 2009	76003	Backhoe, Cat Model as pewr attached	State of Hawaii
HAWAII VENDOR 3	B2008003726 - 01	R2008005741 D2008007392	DO2008002086 - 00	Thu Apr 09 2009	82008	Boilers, High Pressure as per attached specification	State of Hawaii

Solicitations, Amendment Versions, Awards and **Award Versions** are all linked and can be opened for view. The award also has an **Award Summary Report** that summarizes all activity on the procurement process from requisition to solicitation to final award.

To find the **Awards Summary Report** go to the history list above and click on an **Award Number**. When the award opens, scroll down to the bottom and open the dropdown selection. Near the bottom of the selections you will find the **Award Summary Report**. Highlight it and click on **Execute.**

Award Summary Report

The **Award Summary Report** contains the following information:

Document/Requisition information – document numbers, creation date, buyer, dept, approvals

Document Notes – internal notes detailing all the activity of the procurement from creation to final award – this section may be closed by clicking on the **Document Notes** link.

Solicitation information - document number, buyer, agency, email notification sent, date issued, closing date, title, approvals, addendums dates, addendum reason

Responses – vendor responses, name, address, prices

Line Item information – quantity, unit of measure, description

Award – document number, release date, price, awarded vendor info, delivery date, competition information, approvals

Savings report – comparison of estimated cost versus actual award

Summary Report for Document: D2008001657	Requisition: R2008001406	Solicitation: B2008000043

<table>
<tr><td colspan="4" align="center">Notice of Intent to Award DO2008001197</td></tr>
<tr><td rowspan="2">Document/
Requisition</td><td align="center">Number</td><td align="center">Requisitioner</td><td align="center">Date of Requisition</td></tr>
<tr><td align="center">D2008001657
R2008001406</td><td align="center">CHRIS ARCHULETA
Dept: PRD
ABQ BUYER1
Dept: AGENCY</td><td align="center">Nov 08, 2010</td></tr>
</table>

Approvals	
Name	Date
No Requisition Approval Routes	

Document Notes

Fri Nov 12 14:07:37 GMT-0800 (PST) 2010
Award DO2008001197 has been created.
It has been scheduled for release on: Sat Nov 13 00:00:00 GMT-0800 (PST) 2010.
Award Notifications are scheduled for release on: Sat Nov 13 00:00:00 GMT-0800 (PST) 2010.

Fri Nov 12 11:56:00 GMT-0800 (PST) 2010
Successful Lump Sum Primary Award of Solicitation B2008000043 to P00000000003 in Award Input

Fri Nov 12 11:23:38 GMT-0800 (PST) 2010
Award of B2008000043 Items: 001, To: P00000000003 Canceled from Award Creation.
No Awarded items left on this Award, B2008000043 returned to Awards Manager > Abstract

Fri Nov 12 11:22:41 GMT-0800 (PST) 2010
Successful Lump Sum Primary Award of Solicitation B2008000043 to P00000000003 in Award Input

Fri Nov 12 11:21:16 GMT-0800 (PST) 2010
Award of B2008000043 Items: 001, To: P00000000003 Canceled from Award Creation.
No Awarded items left on this Award, B2008000043 returned to Awards Manager > Abstract

Fri Nov 12 11:19:09 GMT-0800 (PST) 2010
Successful Lump Sum Primary Award of Solicitation B2008000043 to P00000000003 in Award Input

Solicitation	Number		Buyer		Notifications Sent
	B2008000043		ABQ BUYER1 Dept: AGENCY		4

	Date Issued	Close Date
	Nov 09, 2010	Jan 19, 2011 2:00 PM

Optional Title
Backhoe

Approvals	
Name	Date
No Solicitaion Approval Routes	

Addendums	
Number	Date
01	Nov 11, 2010

Addendum Reasons

Addendum Reason: 01
Adding revised specifications - Addendum A in the line item area.
Extending closing date for this solicitation an additional 2 days.

Responses	Name	Address	City	State	Total Price (Disc Price)
	HAWAII VENDOR	123 Aloha Street	ALBUQUERQUE	NM	$18.92 (18.92)
	HAWAII VENDOR 1	123 Main Street	Honolulu	HI	$52.30 (52.30)
	HAWAII VENDOR 3	213 Iao Needle	Lahaina	HI	$66.19 (66.19)
	HAWAII VENDOR 3	567 Honolulu Blvd	Honolulu	HI	$93.15 (93.15)

Line Items	Item	Qty	UOM	Cmdty	Partial Description
	001	1	EA	76004	Backhoe/Loader Combination as per attached specifications

Award Signed By: undefined

Number	Release Date	Total Price
DO2008001197	Nov 13, 2010	$52.30

Name	Address
HAWAII VENDOR 1	123 Main Street Honolulu, HI 96801

Delivery Award:	Required Delivery Date: Feb 28, 2011
Award Basis:	Adequate Price Competition
Competition Type:	Open Competition
Competition Comments:	The low bid was not selected because: low bidder did not meet specifications

Approvals	
Name	Date
No Award Approval Routes	

Savings	Estimated Amount	Actual Amount
	75000	52.3
	Dollars Difference	Percent Difference
	$-74947.70	$99.93

Search for Awards

To find an Award using the **Award History** icon. Click on the icon and choose **Search Awards**.
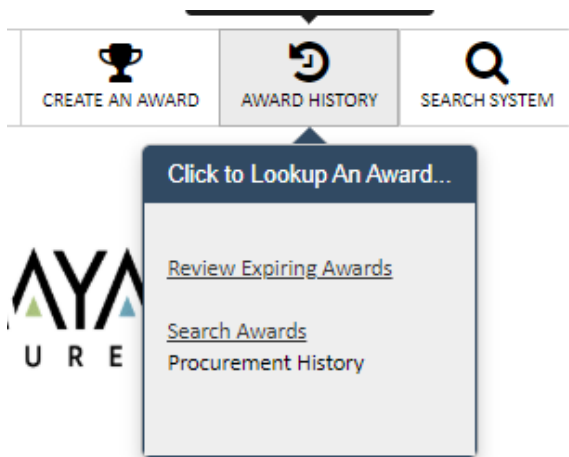
Three (3) searches are available:

Search Within Date Range – enter in the **number of days** you want to search (default is 31 days, maximum is 9999). Choose between **My Awards** (yours only) or **Agency Awards** (all departments, all buyers). Click on **Go**. Results will be in the dropdown selection listed by descending document number. Click on a number to open the award for viewing.

Search By Award Number – **enter the award number** or **reference number** and click on **Get Award**.

Search By Text Within Date Range - enter in the **number of days** you want to search (default is 31 days, maximum is 9999). Choose between **My Awards** (yours only) or **Agency Awards** (all departments, all buyers). **Enter the text** (must be part of the line item description). Click on **Find by Text**. This will display a list of awards that contain that text.