

Formal Solicitation Creation

WebProcure User Activities



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WebProcure Product

Table of Contents

Activity 1	Create Formal Solicitation.....	3
Activity 1.1	Enter Header Information	3
Activity 1.2	Requirements	5
Activity 1.3	Questionnaire (optional)	6
Activity 1.4	Document Selection.....	6
Activity 1.5	Item Specification	8
Activity 1.6	Adding Suppliers.....	20
Activity 1.7	Solicitation Summary	22
Activity 2	Editing Current Solicitations.....	23

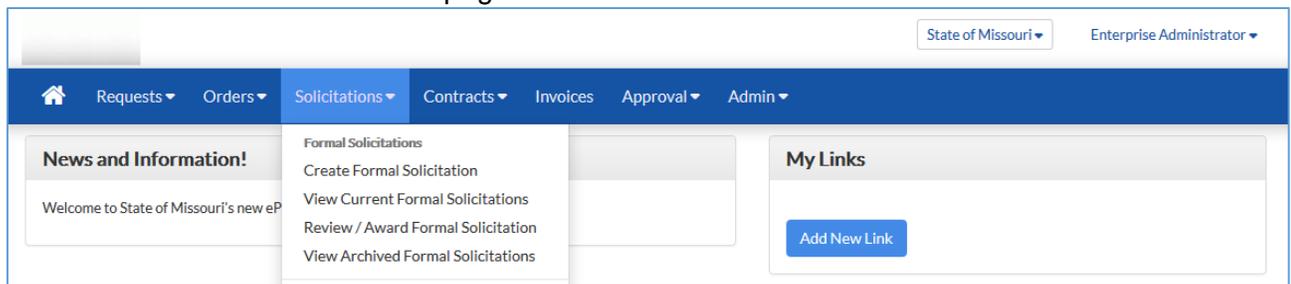
Note: The State of Missouri is initially rolling out the Formal Solicitation module, which has the lock-box technology to enforce the Sealed Bid requirement (meaning a solicitation cannot be awarded or supplier responses viewed prior to the End date and time for the solicitation being reached).

1. Enter your **Username** and **Password** assigned to you for the training session (the password field is case sensitive).
2. Click 

Formal Solicitation Creation

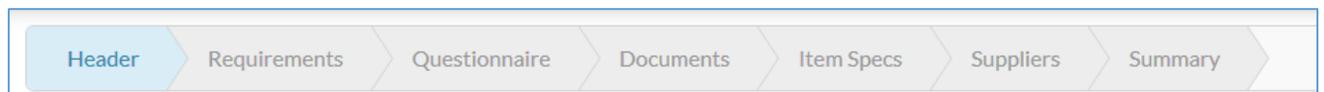
Activity 1 Create Formal Solicitation

1. Click Solicitations from the **Home** page



2. Click the Create Formal Solicitation option from the dropdown listing
3. The **Create** page will open

Note: There are seven possible steps to creating a solicitation. The highlighted step on the sub-navigation bar will indicate the current step in the process.



Activity 1.1 Enter Header Information

Enter the following **General Header Information**:

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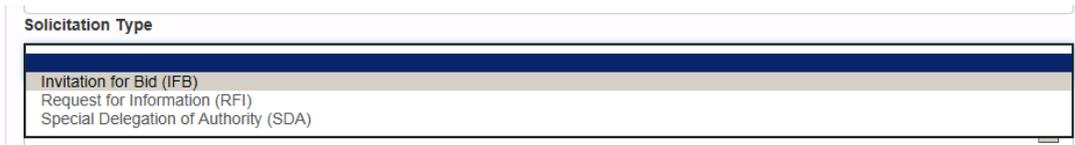
3/31/16

1.1.1. Update the Solicitation **Number**:

Note: Solicitation numbers can include letters and characters. Solicitation Numbers can be editable or non-editable based on admin controls . currently set at editable for your review (Solicitation Numbering will default to Solicitation Type (3-4 digits), FY, Next Sequential Number . Users please insert your Agency Number and Org Number before the fiscal year)

1.1.2 Enter the Solicitation **Title** . i.e. *Training _your initials* (details in title are searchable to suppliers when looking for bids . make it relevant)

1.1.3 Select the **Solicitation Type** from the Dropdown (this list can vary by Agency) . this will default to the first 3-4 digits of the Assigned number, followed by the next available number



1.1.4 Select **Invitation** Type-Defaults to Public

Note: There are 2 available Invitation Types: Public and Private. If Public is selected, the entire supplier community will be able to view and respond to the solicitation. If Private is selected, only the suppliers invited to participate can view or respond to the solicitation.

1.1.5 Enter the **Estimated Total Value of the Solicitation** (this value will not be visible to Vendors . it will be used for Workflow and Reporting) . enter numbers only . no dollar sign

1.1.6 Enter a **Description** . The **Description** field is used to give an overview of what products and services are being requested by your organization. This **Description** will allow suppliers to review the products and services at a quick glance. Enough information should be included to catch the supplier's interest in viewing and participating in the solicitation. Common practice is to enter the contract period as well.

1.1.7 **Solicitation Contact** will default to user creating the document. You can search and update to add additional contacts, or delete what is there and replace with a different person. Type their name in the Find A Contact box and select from offered choices

1.1.8 All bids will have at least 1 line item. Do not check box shown below.

This Solicitation will not contain any line items (Solicitation Categories are required)

1.1.9 **Solicitation Categories** . Use this feature to add categories (general or more expansive) than you will be adding at the line item level. These categories will be visible to the vendor on the front page/header of the Bid/Solicitation . Add note about using Chrome.

1.1.10 **Delivery Terms** . Click the arrow for the drop down box to view all the Delivery Terms available.

- 1.1.11 **Payment Terms** . Click the arrow for the drop down box to view all the Payment Terms available.
- 1.1.12 **Delivery Notes**-current practice is to enter delivery address
- 1.1.13 **Payment Notes**-optional
- 1.1.14 **Solicitation Custom Header Fields** . optional section (The State of Missouri is currently using the custom field for pointing out Pre-Proposals, Tours, and Addendums.)
- 1.1.15 **Solicitation Duration** . Select the start and end dates and times from the drop down boxes.

2 Click  .

Activity 1.2 Requirements

- 1.2.1 This section is optional and can be used by administrator to insert Requirements Fields from the Field Library. You may need to insert your agency name in the requirements text shown below.

- 1.2.2 If text is greyed out, indicates not editable. If there is a checkbox, needs to be checked to be included in solicitation.

Click  .

Activity 1.3 Questionnaire (optional)

1.3.1 Buyer can add questions by clicking button Add New Section.

Questionnaire : IFB16000376 - agency test 12.1 (Formal)

Enter one or more questions. Each supplier will have an opportunity to respond to each question when they enter their Solicitation response.

Enable Scoring

Add New Section

Save Exit

1.3.2 Then Add Question to section and select response type from menu

ATTACHMENT DROP DOWN

TEXT

YES/NO

Attachment

Required

Buyer - Only

Attachment

Add Question to This Section

1.3.3 Check options if required, buyer only or attachment.

Question	Type	Options	Actions
Percentage discount for other desks (enter as 0.0%)	TEXT	<input checked="" type="checkbox"/> Required <input type="checkbox"/> Buyer - Only <input type="checkbox"/> Attachment	
Identify the catalog or price list that discount pricing shall be applied to (give name and	TEXT	<input type="checkbox"/> Required <input type="checkbox"/> Buyer - Only <input type="checkbox"/> Attachment	
Until when is the pricing in this catalog valid?	TEXT	<input type="checkbox"/> Required <input type="checkbox"/> Buyer - Only <input type="checkbox"/> Attachment	

Add Question to This Section

1.3.4. To remove question, click trash can symbol.

Click

Activity 1.4 Document Selection

Header Requirements Questionnaire Documents Item Specs Suppliers Summary

This is currently being used to attach the hard copy of your IFB. Character limit of 79 for title. (Will not upload if title character length is greater than 79)

1. Click .
2. Click which will open the file upload window

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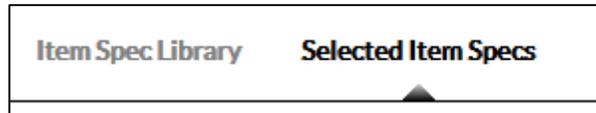
3. Select a document from your computer and click .
4. Click .
5. Click .

Note: All the documents are editable or can be deleted from your list of available documents at any time prior to the solicitation Start date and time, with appropriate permissions. Once a Solicitation is Active a document cannot be deleted from a solicitation. New documents can be added to an Active solicitation through the Solicitation Addendum process. Document library is not currently in use.

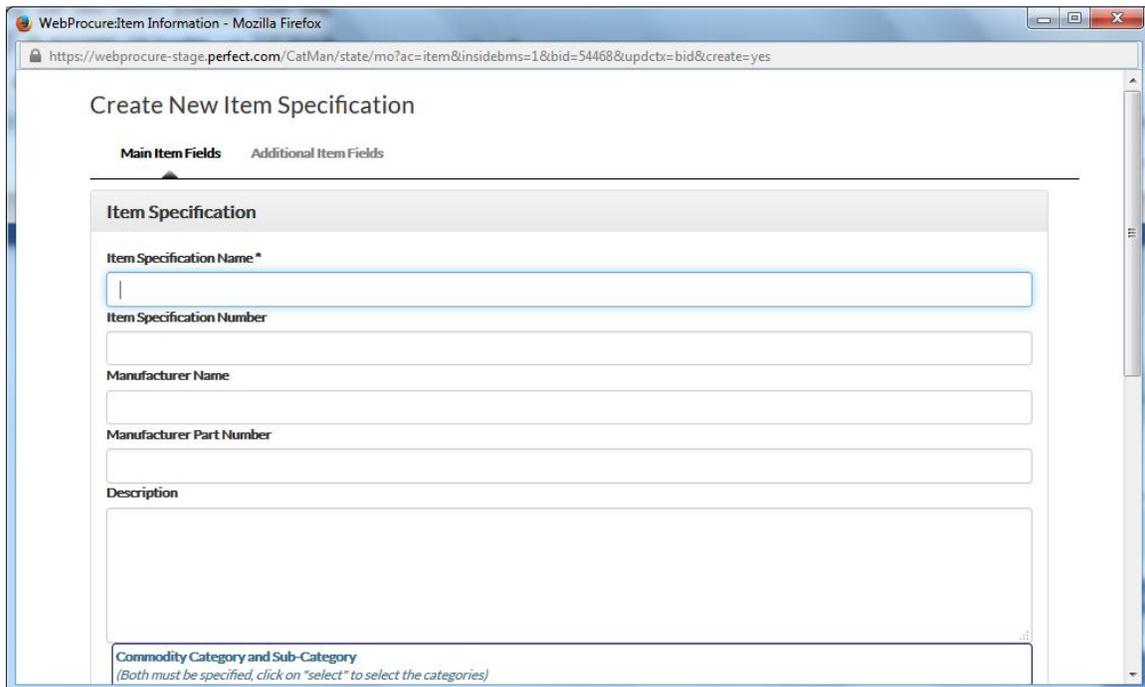
Activity 1.5 Item Specification

When creating a new Solicitation, the **Item Spec** page defaults to the **Item Spec Library** view. In order to create new items to be associated with a new solicitation and also to be associated as an item within the Item Specification Library for future use, follow the below steps for creating a new Item:

1. Click the **Selected Item Specs** tab within the **Item Specifications** section



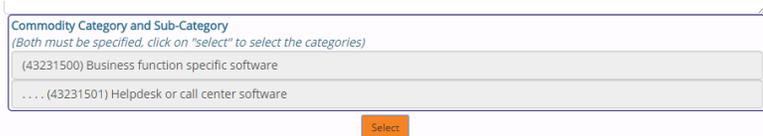
2. Click the Create New Item button **Create New Item** from the header section of the page



3. Enter information into the following fields
 - a. Item Specification Name: (Required)
 - b. Item Specification Number
 - c. Description (enter specifications for item)
 - d. Manufacturer Name
 - e. Manufacturer Part Number
 - f. Commodity Category and Sub Category (Required)
 - i. Click 

Note: The **Commodity Category and Sub Category** step in this Create New Item process is to categorize the item within the UNSPSC code and find a location in the **Item Specification Library** for future use and reference in the **Solicitation** module

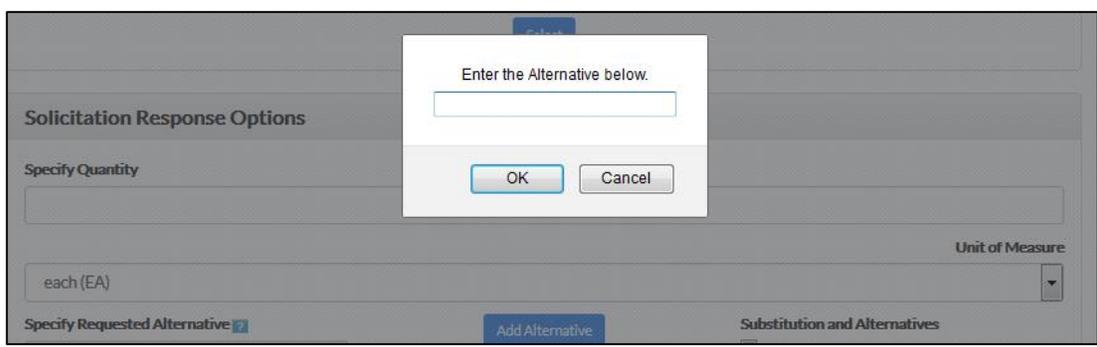
- ii. Type the word %software+in the **Keyword Search** field.
- iii. Click 
- iv. Click the Sub Category 43-231501 Software
- v. Click 
- vi. Now visible on page:



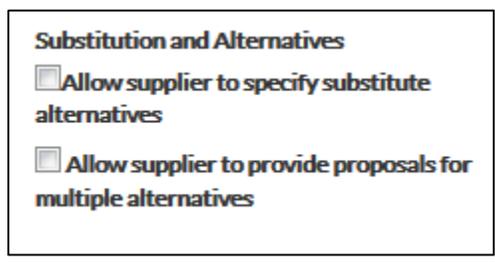
- g. Specify Quantity: Type in a numeric value
- h. Update Unit of Measure if not Each
- i. Specify Requested Alternative:

Note: Any Option entered into the **Specify Requested Alternative** section will be available to the suppliers in a drop down manner during their response period for the solicitation.

- j. Click the Add Alternative button 



- i. Type in the name % year warranty+in the Text box
- ii. Click 
- k. **Substitution and Alternatives** section. (must be selected for an alternate bid to be entered)

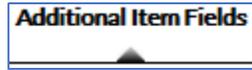


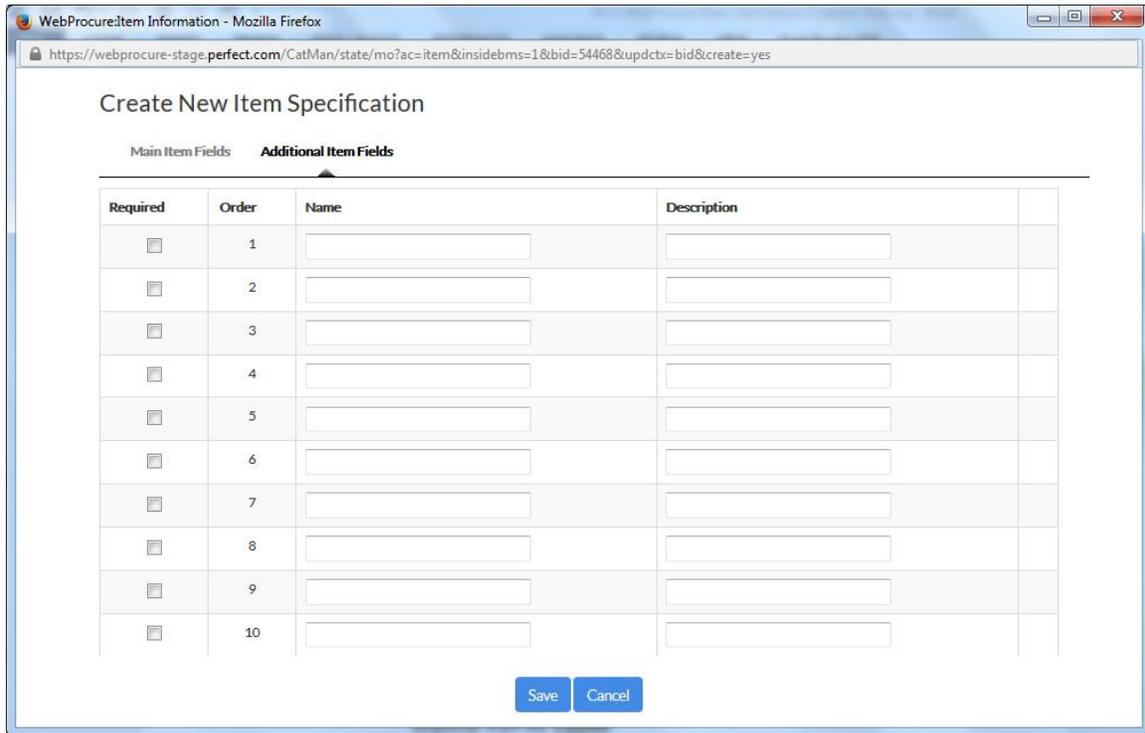
- i. **Allow supplier to specify Substitute Alternatives** option will allow the suppliers to enter in alternate Manufacturer Name and alternate Part Number criteria during their item response
- ii. **Allow supplier to provide proposal for multiple Alternatives** option will allow the suppliers to enter a response for the Item being requested by your organization and also allow the supplier to enter in

an additional response for an alternative item (alternate Brand) for the same item during their response.

I. **Additional Item Fields**

Additional Item Fields

- i. Click the Additional Item Fields tab  to enter in any required information for this item



Required	Order	Name	Description
<input type="checkbox"/>	1	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	2	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	3	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	4	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	5	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	6	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	7	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	8	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	9	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	10	<input type="text"/>	<input type="text"/>

Note: The **Additional Items Fields** allows the Buying Organization to capture additional item information from the Supplier community during the response period.

- ii. Type in the Item requirement in the **Name** field (i.e. Maintenance Years Included; Renewal period)
- iii. Type in the answer for the item requirement in the **Description** field (i.e. annual, 2 year, 3 year, etc.).

Note: The **Description** field is where the Buying organization can help set boundaries around the responses that the Supplier Community will enter. Any direction you can give the Supplier Community to set limits to their answers will be helpful when the **Award/Evaluation** of the supplier responses occur.

- iv. Select the **Required** check box beside each item that you require a response from the supplier.

Note: If an **Additional Item Field** has the **Required** check box selected, the Suppliers will be required to enter a response before their response will be accepted by the system during the response process. If a supplier tries to continue with the response of items without having

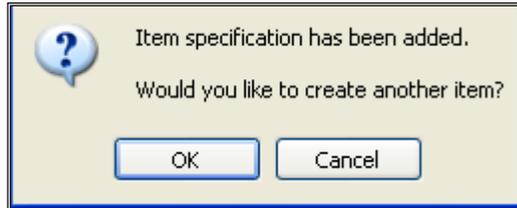
provided an answer for the **Required Item Field** a message box will display to the supplier stating that a response is required prior to the Save action. The supplier will have to enter a response before continuing to another item.

- v. Once you have completed all the **Additional Line Item** fields for the item you can either return to the **Main Item Fields** view by clicking the



Main Items Fields tab, or you can click the Save button  at the bottom of the page to return to the **Selected Item Spec** page of the solicitation.

- vi. The following System message will appear:



- vii. Click the OK button  to create a new item or click the Cancel button  to return to the **Selected Item Spec** page.

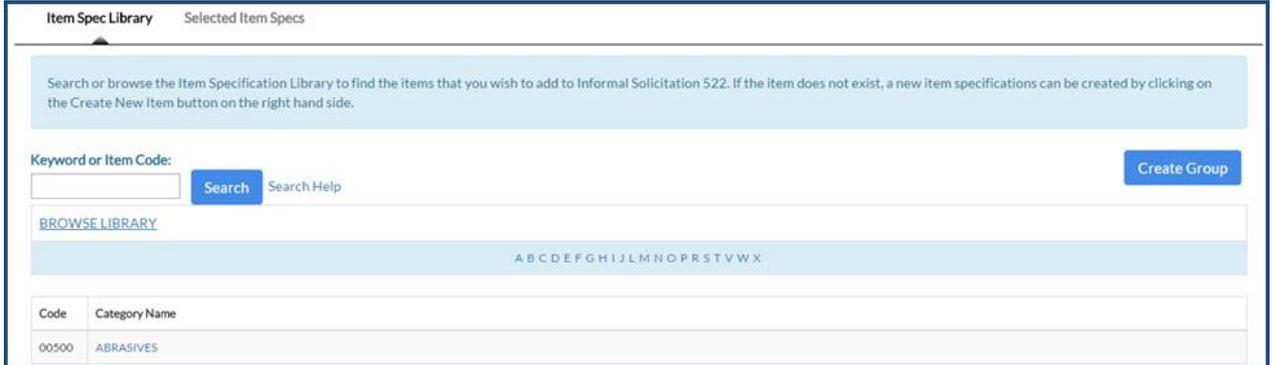
Item Spec Library		Selected Item Specs			
View, edit, delete and specify delivery information for items specifications.					
Reset Numbering	Sequence	Sequencing may take a while for solicitations with a large number of items.			<input type="button" value="Create Group"/> <input type="button" value="Create New Item"/>
No.	Quantity ?	Units	Specification Number	Item Specification Name	Actions
1	1.0	each	N/A	Software	

- viii. Repeat the above steps to create New Items to be added to the current solicitation being created.
 1. Create additional items for the training activity if you wish for practice

4. Click 

- 5. Informational: There are additional features for using line items from the Spec Library
 - a. The **Item Spec Library** view displays a list of available commodity categories that contain items or services that may be attached to the solicitation.

The following is a description and instruction for each element available on the **Item Spec Library** view.

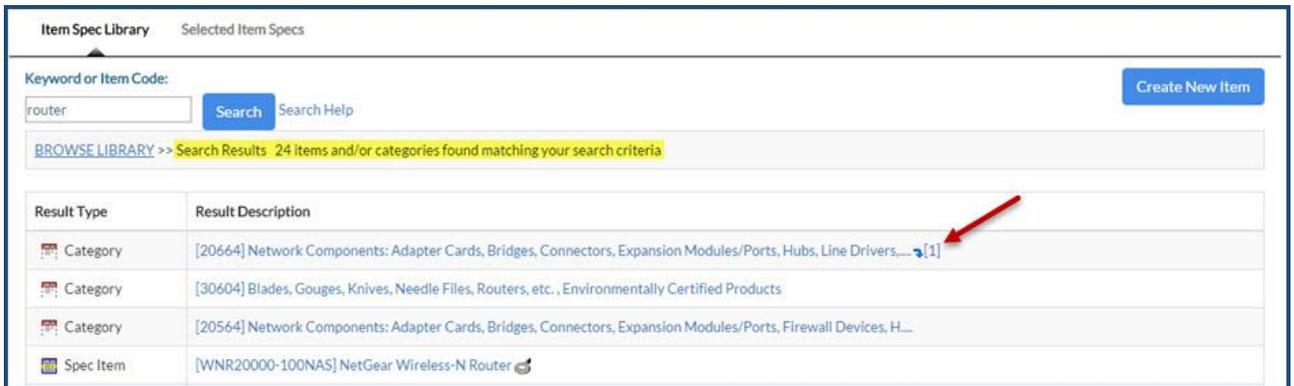


b. Search

Keyword or Item Code - Enter a keyword or UNSPSC item code to search the item specification library for a specific product or commodity code. Click **Search** to launch. The application will display Searching... to the right of the entered term or code.



c. Results



If more than 100 matching items and/or categories are found, only the first 100 will be displayed.

The number next to the **Items Below**  icon identifies how many items or sub-categories are located in that category. Click the hyper linked number to drill down and view.

BROWSE CATALOG >> [20600] COMPUTER HARDWARE AND PERIPHERA... >> [20664] Network Components: Adapter Car...					
Quantity to Add	Selected Quantity	Units	Specification Number	Item Specification Name	Actions
<input type="text"/>	5.0	each	WNR20000-100NAS	NetGear Wireless-N Router	    

c. Actions

Initially, there are 3 icons available in the **Actions** column:

Icon	Meaning
 See Item Details	Select to view Item Specification Details . See sample image here .
 Edit	Select to open the Edit Catalog Item Specifications page. Click here for more information.
 Copy	Select to create a New Item Specification by copying this item. Click here for more information.

Once an item is added to the solicitation, other icons will be visible next to the item that was added:

Icon	Meaning
 Attachment	Select to upload a document, such as diagrams or blueprints, as an attachment for this item. Click here for more information.
 Item Delivery Address / Date	Select to edit delivery information. Click here for more information.

d. Add Items to Solicitation

Once the desired item is located or created, enter a quantity into the **Quantity to Add** text box.

Click **Add Items**.

The item count located in the upper right corner will update to reflect the number of items not the quantity of each item that has been added to the solicitation. See image below:



Repeat these steps to add additional items to the count.

Once your items have been added to your solicitation, access **Selected Item Specs** to view, edit, delete or specify delivery information.

Additional item fields can be added by clicking that tab, entering the details. If desired, you can apply to all items in the solicitation.

Edit *Solicitation* Item Specification
(To edit catalog item go to Item Spec Library)

Main Item Fields Additional Item Fields

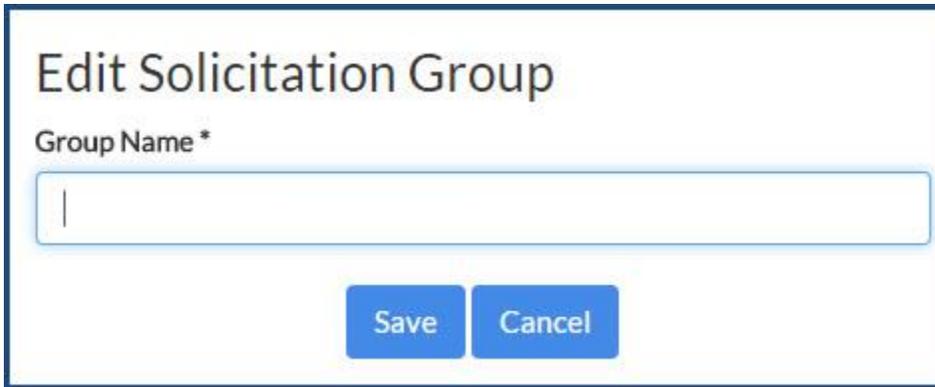
Required	Order	Name	Description	Apply to all items
<input type="checkbox"/>	1	Color choice	Neutral	<input checked="" type="checkbox"/>
<input type="checkbox"/>	2			<input type="checkbox"/>
<input type="checkbox"/>	3			<input type="checkbox"/>
<input type="checkbox"/>	4			<input type="checkbox"/>
<input type="checkbox"/>	5			<input type="checkbox"/>
<input type="checkbox"/>	6			<input type="checkbox"/>
<input type="checkbox"/>	7			<input type="checkbox"/>
<input type="checkbox"/>	8			<input type="checkbox"/>
<input type="checkbox"/>	9			<input type="checkbox"/>
<input type="checkbox"/>	10			<input type="checkbox"/>

Save Cancel Delete Item

6. Informational: There are additional features for using line items by Creating Group

- a. Users may create groups such as *Accounting, Information Technology*, etc. and associate items with those groups. When awarding the items to suppliers, you may choose to award these user-specified groups of items.

Select **Create Group** from the **Item Spec Library** or **Selected Item Specs** pages. The **Edit Solicitation Group** window opens:



As indicated by the asterisk *, the **Group Name** is required. Enter in a descriptive name.

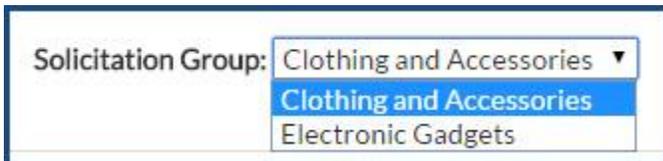
Click **Save** to create the new group.

Cancel closes the window without creating a group and returns to the **Item Spec Library** or **Selected Item Specs** page.

Once a group is created, it is visible at the top of both the **Item Spec Library** and **Selected Item Specs** pages.

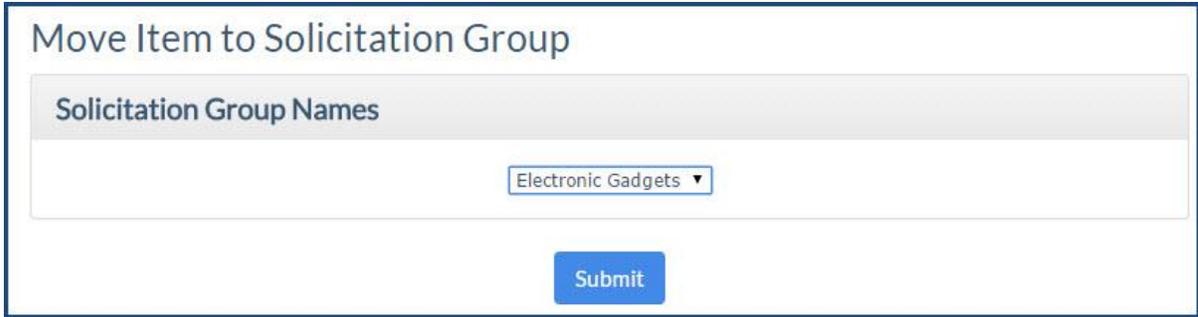
Once groups have been established, you should choose the group you want to place the item into *before* searching and selecting an item or creating a new item specification.

Groups are listed alphabetically:

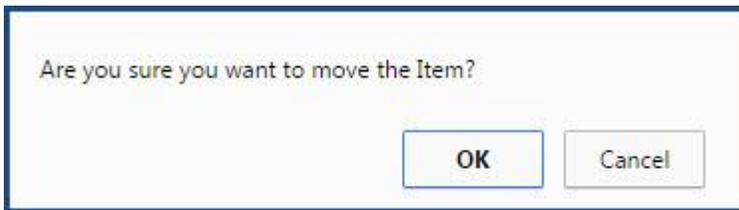


b. Move Item to Group

If necessary, an item may easily be moved to a new group. Select the **Move**  from the **Actions** column of the item to be moved.



Use the drop down menu to select the correct group to move the item to. A confirmation message displays:



Click **OK** to proceed with moving the item.

Cancel ends the moving process; item remains in its current group.

c. Manage Groups

The following sample image shows two groups: *Clothing and Accessories* and *Electronic Gadgets*.

Reset Numbering	Sequence	Sequencing may take a while for solicitations		
Clothing and Accessories   Group				
No.	Quantity ?	Units	Specification Number	Item Specifici
<input type="text" value="1"/>	<input type="text" value="50.0"/>	each	88042	Men's Micro Plus
<input type="text" value="2"/>	<input type="text" value="50.0"/>	each	78011	Ladies Micro Plus
<input type="text" value="3"/>	<input type="text" value="50.0"/>	each	0011055	Totes Umbrella
Electronic Gadgets   Group				
No.	Quantity ?	Units	Specification Number	Item Specifici
<input type="text" value="4"/>	<input type="text" value="10.0"/>	each	310362	Apple iPad Mini
<input type="button" value="Save"/>				

d. Edit Group Name

Choose the **Edit**  link to the right of the group name to perform a name change on the group.

Edit Solicitation Group

Group Name *

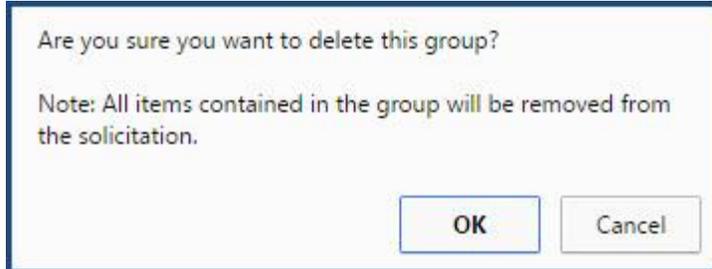
Click **Save**.

Cancel closes the **Edit Solicitation Group** window without saving.

e. Delete Group

To remove a group and **all** of the items in that group from a solicitation, select the **Delete**  icon located to the right of the group name to be deleted.

The following message displays:



NOTE: All items contained in the group will be removed from the solicitation. If this is not your desired result, you must first move items out of the group that is being deleted and into a new group. Follow the instructions above on how to [move](#) items.

Activity 1.6 Adding Suppliers

Note: The system will perform an automatic search for all **Approved** Suppliers that have matching commodity categories associated to their organization's profile as the items contained on the solicitation that is being created. The system by default will **Add** all supplier profiles to the Supplier Invitation List

1. The following System Confirmation message will appear:

The screenshot shows the 'Supplier Selection' dialog box in the WebProcure system. The dialog box contains a 'Searching...' message and a confirmation message: 'All Suppliers have been added to this Formal Solicitation'. Below the confirmation message is an 'OK' button. The dialog box is titled 'Supplier Selection' and is part of a larger system interface with a navigation bar at the top.

Then:

Or:

The screenshot shows the 'Supplier Search Results' dialog box. The dialog box contains a message: 'No Suppliers were found matching the commodity categories of the selected solicitation items.' Below the message is a 'Search Again' button and an 'Exit' button. The dialog box is titled 'Supplier Search Results' and is part of a larger system interface with a navigation bar at the top.

2. Click to close the system message if suppliers were added
3. Or Click to find additional suppliers to add. This will take you to the Add Suppliers tab. Fill in supplier name (or * wildcard to search all, and hit the button on the Categories to search for suppliers outside of your selected categories (or just search by name)

Organization Supplier Search

Supplier Name Advanced ?

Region

Minority Status

Minority Business Enterprise

Woman Owned Veteran Owned Small Business

Categories

Scroll to the bottom and hit

4. Select Suppliers to add or hit Check All to select all listed :

Supplier Search Results

[Check All] [Uncheck All] 2 matching suppliers found Page 1 of 1

Select	Supplier	DBA	Relevance	Location	HQ	MBE	WBE	SB	VOB	Actions
<input type="checkbox"/>	MO Test Supplier 1	--	71%	Paradise, FL, 33707 United States	✓		✓			
<input type="checkbox"/>	MO Test Supplier 2	--	71%	Jefferson City, MO, 65101 United States	✓					

1

Note: If there are supplier profiles associated with Missouri State that are not associated to the commodity categories that match the solicitation items categorization- then the supplier organization will not be produced in the automatic search for invitation to participate in the solicitation being created.

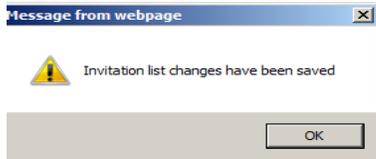
To perform additional supplier searches, click . Utilize the available search criteria to locate and add additional suppliers to the Solicitation Invitation list.

5. Click the Next Step button

- Click Save Selections button.



Message from webpage will confirm that invitations have been sent to selected suppliers.



Activity 1.7 Solicitation Summary

- Review the Solicitation document

- Scroll to the bottom and click 

Note: If you find a mistake or missing information after reviewing the Solicitation document, click



until you reach the step that requires modification.

Click  at the bottom of each page to apply any modifications made.

- You will be returned to Un-issued Solicitations.

Un-issued Solicitations Active Solicitations

Solicitation #	Title	Buyer	Start Date	End Date	Status	Actions
RFPT6	Field mapping test 3-dtl	D Lines	Nov 30, 2015 11:00 AM CST	Feb 29, 2016 2:00 PM CST	Approved	
RFPT9	DTL test 8.18	D Lines	Sep 30, 2015 11:00 AM CDT	Dec 31, 2015 3:00 PM CST	Not Submitted	

Displaying: 1-2 / 2 << < 1 > >>

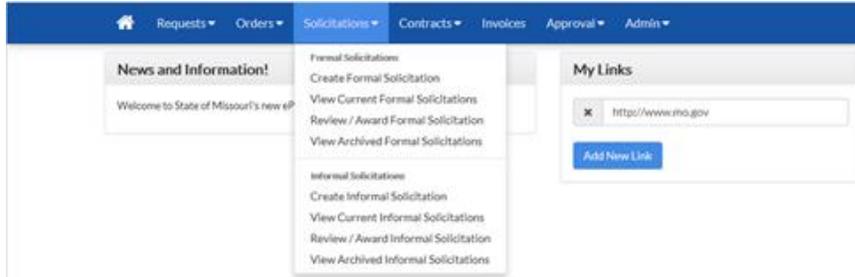
- Click Submit for approval icon. 
- Once Approval process has completed the Solicitation will sit in Approved, until the Start Date and Time
- Once the Start Date and Time are reached, and the Solicitation was approved, the Solicitation will start.

NOTE: If the Start Date and Time are reached and the Solicitation was not approved, the Start Date and End Date will move out 24 hours (1 day) each day until approved

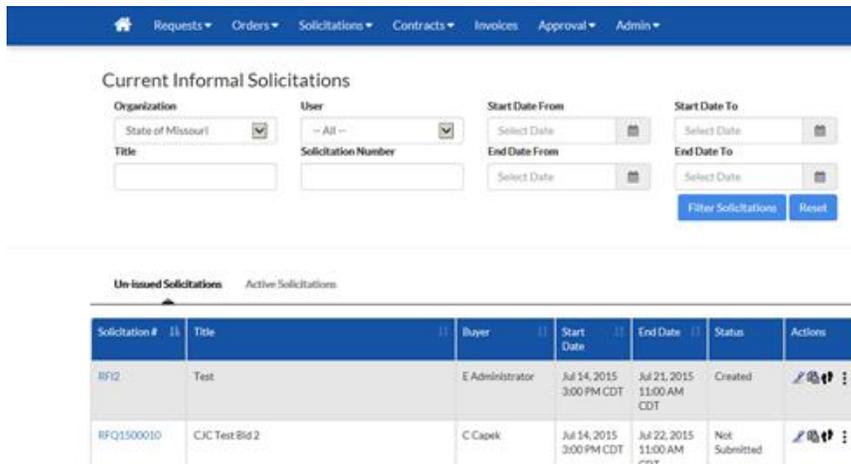
****Solicitation Creation Process is now complete. ****

Activity 2 Editing Current Solicitations

To find your current solicitation, choose from the menu under the Solicitations tab, either View Current Formal Solicitations.

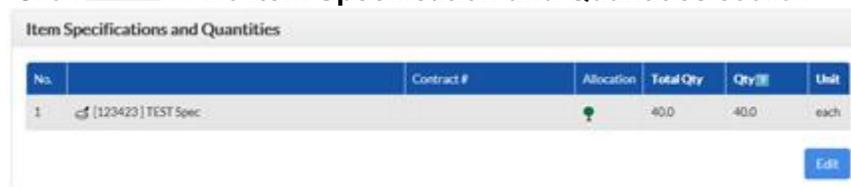


1. Defaults to Un-issued Solicitations tab.



2. Click the Edit icon  under the Action column next to the Solicitation you created (clicking the Solicitation # displays the **Solicitation Report Summary** page).

3. Click **Edit** in the **Item Specification and Quantities** section



or click the Edit Item Specs option from the sub-navigation bar



4. Click the Selected Item Specs tab within the **Item Specifications** section

Item Spec Library Selected Item Specs

5. Change the Quantity of a Solicitation item
6. Click SAVE
7. Click RETURN to display the **Summary** page
8. Click CLOSE to return to the **Current Formal Solicitations** page.