Sourcing Supplier Bidding Guide

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Welcome to Enterprise Sourcing!

This guide is intended to provide instructions to suppliers on how to interact with the system in order to find and respond to bid requests. The pictures and screenshots used in this guide were all taken from an IBM PC Compatible running Windows 2000 using Microsoft Internet Explorer 6. The appearance of the system may be slightly different on another operating system or Internet browser.

System Requirements

- A standard web browser that **must have JavaScript enabled**.
  - IWT recommends Internet Explorer 7.x or greater for the best system performance.
  - Mozilla Firefox – current version recommended
  - Safari – current version recommended
- The browser must also allow pop-up windows when accessing the system.
- Establish <thissite> as a Trusted Site in your browser's Internet Options, Security settings. (https://customer.ionwave.net/<thissite> or https://sciquest.ionwave.net/<site>
- Configure your screen resolution to a minimum of 1280 x 768 pixels (Display Properties).

Responding to Bid Requests – Quick Tutorial

Login to the Bids tab. Under **"My Recent Invitations"** Click on the desired bid number to View the bid request.

Figure 1. Supplier Home Page

Bid Detail – View

View the bid request information to determine level of interest in submitting a bid response. The bid detail screen is broken into sections that are self-explanatory. Be sure to read and understand every section and bid detail prior to moving forward.

Respond

Select the **'Respond'** icon near the top of the screen to create a bid response.
Select the **'No Bid'** icon near the top of the screen if you choose not to respond to a bid request.

Edit Bid Response

Enter desired bid response information in the fields provided and choose **'Save'** to retain the bid response information.
Select **'Submit'** to formally send a bid response to the buying organization. Pay attention to the following sections/fields:
- **Ship to Information** – The winning bidder will be required to ship to the listed location.
- **Supplier Note to Buyer** – Enter comments for buyer review. (Field is available at the buyer's discretion)
- **Event Activities** – Lists events related to the bid request. Some events may require bidder's response and participation such as Intentions to Bid, Pre-Bid/Proposal Conferences, Planholder Displays, and Job Walks.
- **Bid Attachments** – Select **'View'** to access the buyer's bid attachments.

- **Bid Attributes** – Answer questions, complete checklists, and review additional terms and notes.

> **REMINDER: Select 'Save' to record and store current bid response progress.**

- **Bid Messages** – View messages specific to the bid request.

- **Response Attachments** – Allows you to upload files at the buyer's request.
  - o **'New'** – Add a new Bid Response attachment.
  - o **Title** – Enter attachment name.
  - o **Description** – Explain attachment
  - o **File Path - 'Browse'** to locate and select the desired file. *<Maximum 25MB per file>*.
  - o **'Save'** to attach the file
  - o '**Edit'** – Edit an existing attachment file or description.
  - o **'Delete'** – Delete an attachment.

> **REMINDER: Select 'Save' to record and store current bid response progress.**

- **Bid Line Items** – Enter unit pricing (or requested values) in the fields provided under **Unit Price, Price, or Percentage**.
  - o **Extended Pricing** (= Quantity X Unit Price) – will display after clicking '**Save'**.
  - o **'New Alt' link** – Click link to enter an Alternate and/or equivalent item for buyer's consideration. (link may not be present)
  - o **'No Bid' link** – Indicates that the bidder is not submitting a response to a line.
  - o **Supplier Notes** - Enter comments for buyer review. (Field is available at the buyer's discretion).
  - o **Item Attributes -** Answer questions, complete checklists, and review additional terms and notes specific to the line item.
  - o **Item Attachments** - Select **'View'** to access the buyer's attachments related to a line item.
  - o **Multiple Pages of Bid Line Items – Pagination** – If displayed, click to the next page to continue responding to bid line items.

Figure 2. Pagination bar example

> **REMINDER: Select 'Save' to record and store current bid response progress.**

Submit the Bid Response

Select the **'Submit'** icon at the top of the screen to submit the bid response to the buying organization.
- o The Sealed/Informal Status screen will display when the bid is successfully received by the system. The bidder's time stamp is displayed next to the **"Response Submitted"** field.
- o **'Retract'** to make changes to the submitted bid response. NOTE: A retracted bid response is no longer considered "submitted". The user MUST RE-**'Submit'** a retracted bid response to ensure participation. The retraction function is available at the buyer's discretion.

The following pages contain detailed system documentation provided for the bidding user's benefit. Review each section to educate and understand the features and functions available to assist suppliers in submitting bid responses electronically.

Working with the System

Required Information

A red asterisk (*) is used to denote required information.

System Time

Displayed on every page of the system (top right). Some browsers and browser settings do not correctly display the system time. The user's operating system may incorrectly display the system time due to other software monopolizing system resources. The system time is displayed according to the user's selected time zone.

Log Off | Help
Welcome Bill Bigly!
Server Time (Central): 12:59:30 pm

Figure 3. System Time

'Save' icon

Displays on menu bars and screens throughout Sourcing and is used to record data entered by the bidder. IWT strongly recommends that users 'Save' their work on a consistent basis.

'Return' icon

Displays on menu bars and screens throughout Sourcing and is used to take the user to the previous screen. IWT strongly recommends that users abstain from using the browser's 'Back' button.

User Accounts

Suppliers are strongly encouraged to establish multiple user accounts under the company profile. To **add** a user, select the Admin tab, Company Profile sub-tab, Users tab-strip, then choose **'New'**. Enter the required information including user id and password and choose **'Save'**.

Inactivity

For security purposes, Sourcing will automatically logout after sixty minutes of inactivity. Unsaved work will be lost.

Menu Bars

Throughout the system, lists and pages make use of menu bars that will display available actions. To take an action on an item in a list, place a checkmark beside the item and select the menu bar icon for the action you desire. Within a page select the action you would like to take.

Pagination Bars

The system splits long lists of items into multiple pages. Displayed at the bottom of every list, the pagination bar will give the current item range displayed and the total number of lines on the right. The pagination bar includes a link to each page number, links to advance forward or go backward a single page, and links to move to the beginning or end of the list.

Items 1-15 shown of 31 • Page 1 of 3 shown   1 2 3 ▷ ▷▷

Figure 4. Pagination Bar

Documents

Throughout the system, you may access documents associated with bid requests and responses. To access the documents, Select the 'Documents' from the menu bar in a listing, a bid request, or while viewing a bid response.

The displayed list of documents will be divided into two or three sections; one lists documents that are automatically pre-generated by the system at specific times, the second lists documents that you prompt the system to generate. (Ad-hoc). The third section, if it exists, contains any documents attached to the bid request by the buyer.

Document availability is set by the buyer for each bid event.

Documents listed may be in the following formats:

- **Adobe Acrobat (PDF)** – PDF is a read-only format that can be viewed using the Adobe Acrobat Viewer, which is available for free from www.adobe.com.
- **Microsoft Excel (XLS)** – Excel is a common spreadsheet format. The system generates spreadsheets in Excel 95 format. An Excel viewer is available for free from www.microsoft.com/office/downloads/.
- **Tab Delimited Text (TXT)** – A tab delimited text file. This format will typically be used by the system for exporting raw data. This file can be viewed with any standard text editor or manipulated using any standard spreadsheet program.
- **Extensible Markup Language (XML)** – XML files are commonly used for the process of integration. The system has the capability to extract data in XML format for specific purposes.

Documents Available for B-5/2006-7 (Electrical supplies)

⇦Return

Pre-Generated Documents

Document	Format	Description
Invitation Document	Adobe (PDF)	PDF Invitation to Bid

Ad-hoc Documents

Document	Format	Description
Supplier Individual Response Document	Adobe (PDF)	PDF Supplier Response
Award Summary Document	Spreadsheet (XLS)	Award Summary Spreadsheet

Attachments

Line	Filename	Description
Header	Terms and Conditions.doc	Terms and conditions
Header	Project plan.doc	Project plan and roadmap for completion

Figure 5. Documents Listing

Finding a Bid Request/Response

There are two ways to find a bid request or response. You may use the lists and "Bidding Shortcuts" on the "Welcome" page which opens when you select the main "Bids" tab at the top of the page. You may also select "Bid Requests" on the strip below the "Bids' tab.

Welcome Page

There are two lists on the "Welcome" page.
1. My Recent Invitations
2. My Recent Draft Responses

Bidding Shortcuts

Bidding shortcuts are located in the shaded text box at the left of the screen. The links provided are:
1. View Available Bids
2. View My Draft/Submitted Responses
3. View My Closed Responses

Viewing a Bid Request

- Login.
- Go to the desired bid listing
- Select the desired Bid Number to view the bid request. (or check the box next to the bid and select "view").
- Each section of the Bid in "view" is explained below.

Bid Detail

- **'Return'** – Navigates the user back to the previous page.
- **'Respond'** – Select to start a bid response. See *Responding to a Bid Request* section.
- **'History'** – Displays the bid request's audit history including addendum information if applicable.

Bid Information

The Bid Header consists of the following information:
- **Organization** – Company, Agency, Entity, or Department responsible for the bid request.
- **Buyer Name, Email, Phone, Fax** – displays contact information for the buyer responsible for the bid request.
- **Bid Number** – Bid number assigned by the buyer/organization.
- **Bid Title** – Descriptive title for the bid request.
- **Bid Type** – Defines the procurement method.
- **Bid Security** – The three bid security settings are:
  o **Informal** –Buyers can see all information about supplier responses before and after the event due date/time.
  o **Sealed** –The Bid Response data is encrypted by the system and locked in an electronic lock-box until the bid is Closed and a bid 'opening' or unsealing event is initiated.
  o **Open**– Suppliers can see the current "best" pricing for requested items. Buyers can see all information about supplier responses. Sometimes referred to as a Reverse Auction.
- **Bid Issue Date** – The date the bid request was issued and available for supplier responses.
- **Bid Close Date** – The date the bid request will close and bid responses will no longer be accepted.
- **Bid Notes** – Additional notes from the buyer about the bid request.
- **Bid Status** – The current status of the bid request.
  o **Issued** – The buyer has issued the bid, but you have taken no action.
  o **Edited** – The supplier has viewed and edited the response.
  o **Submitted –** The completed response has been submitted to the buying organization.
- **Status Reason** – If applicable, additional information about the bid request's current status.
- **Attachments Allowed** – Indicates that the buyer is permitting the supplier to include required or optional attachments.
- **Response Status** – The system will display your current response status:
  o **No Response/Viewed** – Indicates that you have not begun a bid response.
  o **Edited** – Indicates that a response has been created and edited but not submitted
  o **Submitted** – Indicates that a bid response has been successfully submitted.
  o **Retracted** – Indicates that a bid was submitted, but retracted. After retraction, a bid <u>must</u> be submitted again if the bid response is to be considered.
  o **Disqualified** – Indicates the buyer has disqualified a submitted response. Disqualified suppliers are not permitted to submit another bid response.
- **Contact Information –** Contact information for a bid request.
- **Ship-To Information** – Shipping address information for the commodities. This information may be blank if the bid request is for a term contract or if shipping information is specified in another section of the request.
- **Bill To Information** – The address to direct your invoices and other billing inquiries.
- **Event Activities** – A list of activities associated with the bid. In the case of an Intent activity, you may be required to respond with your intent before responding to the bid request itself.
- **Bid Attachments** – Documents attached to the bid request. Access the document by selecting the [View] hyperlink. **It is your responsibility to view all attachments associated with bid requests.**

Bid Attributes – Additional questions or information the buyer has added to the bid. Buyers may request an attribute response by setting a response value. The possible response value settings are:

  o **Display**– A display attribute is used by the buyer to convey additional information to the supplier. No response is permitted.
  o **Optional Response** – A question to which the buyer is giving you the option to respond.
  o **Required Response** – A question to which the buyer requires a response.

- **Bid Messages** – Information messages added to the bid request by the buyer. These may consist of clarifications or changes to the requested information. The buyer may also choose to send these messages to you via e-mail in addition to posting them on the site.
- **Response Attachments** – Allows you to attach pertinent or required documents to your bid response.

Bid Line Information

Bid Line Items

Line	Specification

1 Commodity Line

Qty	UOM	Description
10	Sets	9 Pcs 3/4" Dr. Deep Impact Socket Set. Sae Sizes 9 Pcs: 1, 1-1/16, 1-1/8, 1-1/4, 1-5/16, 1-3/8, 1-7/16 & 1-1/2 Inch in a metal or heavy duty plastic case.

Commodity: General Supplies
Item Notes: Only bids that include sockets in a case will be considered. Sockets must be deep impact style

Item Attributes

#	Name	Note	Response	Type
1	Manufacturer	Enter the name of the Manufacturer of the item you ares submitting for bid.	Required	Short Text
2	Warrenty	Enter the details of the exchange or warrenty policy.	Required	Short Text

2 Commodity Line

Qty	UOM	Description
7	Sets	9 Pcs 3/4" Dr. Deep Impact Socket Set - Drop Forged. Metric Sizes 9 Pcs: 26, 27, 29, 30, 32, 35, 36 & 38 mm. Must come in a metal or heavy duty plastic case.

Commodity: General Supplies
Item Notes: Bids will only be accepted for items that include a metal or heavy duty plastic case for the sockets.

Item Attributes

#	Name	Note	Response	Type
1	Manufacturer	Enter the name of the manufacturer of the item you ares submitting for consideration.	Required	Short Text
2	Warremty	Enter the return and exchange policy for this item, and what, if any, manufacturer warrenty exists for the item.	Required	Short Text

Figure 6. View Line Items

Bid Line Items may include the following information. The actual information displayed depends on the type of line item type you are viewing:

- **Line Number** – The line number.
- **Quantity** – The quantity requested by the buyer.
- **Unit of Measure** – The unit of measure requested.
- **Description** – The description of the goods or services requested.
- **Commodity** – The buyer assigned commodity code.
- **Manufacturer** – the name of the item manufacturer
- **Manufacturer Number** – the number assigned to the item by the manufacturer
- **Item Notes** – Additional notes from the buyer on a specific line item.

- **Supplier Notes –** Information specific to the line item that you want the buyer to consider when evaluating your response.
- **Item Attributes –** Questions or information specific to a line item. Item attributes can be presented as text fields, checkboxes, and value lists.
- **Item Attachments** – Information attached to a specific line item. You can access the information by clicking on the [View] hyperlink. **It is your responsibility to view all attachments associated with line items.**

Responding to a Bid request

Intent to Bid

A buyer may enter an Intent to Bid activity in a bid request. This must be responded to before the date specified

Date	Activity Name	Description
☐ 11/25/2006 9:00:00 AM CST	Intent to Bid	Enter intent to bid by the 25th

Items 1-1 shown of 1

Figure 7. Activities Listing

To respond, click on the 'Respond' button at the top of the screen. Select your answer from the drop box and click 'Save'. The buyer will be able to access your response.

Figure 8. Response to Intent Activity

Bid Response

After viewing a Bid request and clicking 'Respond', the system will allow you to begin working on your bid response. Menu Bar actions on this page include:

- **Return –** Navigates back to the listing page.
- **Save –** Saves your progress. The system provides you the ability to build your bid response over the course of multiple login sessions.
- **Submit** – Submits your bid response to the buyer. In some cases, you will have the ability to retract a submitted bid as long as the bid request is still open for bidding. This is useful if you have made an error, but it is only possible if the buyer has elected to allow supplier bid retraction.
- **No Bid –** Select if you have chosen NOT to submit a response.
- **View Response** – Allows you to view your bid response.
- **Status** - Will allow you to view the status of a bid request and your response. If the bid request has the Open security setting and the buyer set-up allows it, you can view competitive pricing on the status page.

- **Documents -** Will allow you to view documents associated with this bid request.
- **Response History** – Details the history of your bid response. If you retracted or updated a bid response, all the details of that change will be documented here.
- **Bid History** – Lists the history of the bid request. Any changes that were made to the bid request will be documented here.

Supplier Information

Supplier Name	School Supplies Inc
Contact Name	
Address	4515 N. South St
	Suite 201
	Springfield, MO 65805
Phone	65805
Fax	
Email	

Supplier Note to Buyer

Supplier Notes

Event Activities

🔍 View

	Date	Activity Name	Description
☐	5/26/2006 1:00:00 PM CST	Job walk	Job walk for the planned site.
☐	5/31/2006 5:00:00 PM CST	Intent to bid	Respond with your intent to bid. If you do not intend to bid, give your reason in the Notes to Buyer field and submit the response.

Items 1-2 shown of 2   1

Bid Attachments

#	Name	Description
1	Terms and Conditions.doc [View]	Terms and conditions
2	Project plan.doc [View]	Project plan and roadmap for completion

Items 1-2 shown of 2   1

Bid Attributes

#	Name	Note	Type	Response
1	Acceptance of Terms and Conditions	Check to indicate you accept the terms and conditions as laid out in the attached document. Only responses that include this acceptance will be considered for award.	Checkbox	☐ **Accept Terms and Conditions** *

Figure 9. Responding to a Bid – Header Elements

- **Supplier Information** – Billing address information for the bid request. This information may be blank if the bid request is for a term contract.
- **Supplier Note to Buyer** – If applicable. The buyer controls whether supplier notes are allowed on a bid request.
- **Required Fields** – are noted with a red asterisk. Buyers may require suppliers to provide Manufacturer and Manufacturer Number information in relation to a specific line item specification.
- **Bid Attribute Fields** – If optional response or required response attributes are present on the bid header, a response field will be displayed. A red asterisk to the right of the field indicates a required response attribute. Your bid response will not be accepted if you fail to respond to Required Response attributes.
- **Bid Messages** – Messages from the buyer organization to suppliers.
- **Response Attachments** – On certain bids, the buyer may allow or require you to attach documents to your bid response. If this is the case, a section titled 'Response Attachments' will be displayed. To attach a document, click the 'New' icon, browse and select the file you wish to attach, enter a short description of the file you are attaching, and click 'Save'.

The Bid Line Items section displays all the line items available on the bid.

Figure 10. Responding to Line Items

- **Price/Percentage Field** – This system allows you to provide your price or percentage response for each of the line items. This field only supports numeric responses. Do not enter '$', '%', or other symbols into this field.
- **Extended Value** – Once you have entered a price or percentage response and have clicked 'Save', the system will confirm your entries by displaying the calculated extended value. For lines with a quantity this will multiply your unit price by the quantity for your total extended response.
- **Supplier Notes** – If present, this field allows you to provide additional notes to the buyer regarding a specific line item.
- **Item Attributes** - If optional response or required response attributes are present on a line item, response fields will be displayed.

Buyers can also group line items into packages. Packages are clearly identified in the Response view and edit screen and differ from individual line items in the following ways:
- **Package Lines** – Displayed as #.#. The first # denotes the package line number. The second # (after the decimal point) denotes the Package Line number within the given package.
- **Alternates** – Packages do not support providing alternates.
- **Required response** – The system may require you to respond to all items in a package.
- **Package Response Calculation** – Once you have entered a response for each packaged item, the system will automatically calculate the total package response value for lines with prices. This package pricing will be displayed on the package header line, along with an extended package pricing for the quantity of packages requested. Any percentage response lines within a package will not be included in the calculation.

Specifying Alternate or Equivalent Items

The system gives you the ability to add multiple alternate bid responses for each line item if allowed by the buyer. To add an alternate bid response, click the 'New Alt' link to the left of a line item when you are editing your response. If the 'New Alt' link is not present, the buyer has instructed the system to not allow alternate bid responses for this item.

Once you click 'New Alt', the system will duplicate the line item, specifying 'Alt 1' to the left of the line item. The fields available and required in the alternate item may differ from those in the specification line. You can then enter an alternate quantity, alternate unit of measure, alternate specification, alternate manufacturer, alternate manufacturer number, unit pricing, supplier notes, and attribute responses. **Be sure to provide the alternate specification in the provided fields!** The buyer has the ability to make fields and attributes on the alternate item required. Those fields will be marked with a red asterisk and must be responded to before your response can be submitted.

Figure 11. Specifying an Alternate

If you create an alternate line response and later wish to remove it, clear all the fields in the alternate specification and the alternate will be automatically deleted when you submit your response.

Submitting Your Bid Response

To submit your bid response, click the 'Submit' icon. **NOTE,** the server time displayed by the system is controlled by the time zone selected in your user profile. The automatic updating clock in the top-right of the screen is controlled by your browser and may be off by a few seconds.

Once you submit your bid, the system will automatically take you to the Status screen, which shows a streamlined display of your bid response.

Printing a Copy of your Response

By utilizing the Documents menu option, you can save or print an Adobe Acrobat (PDF) version of your bid response. Open the "Supplier Individual Response Document" by clicking on the link. Please note for additional security Adobe Acrobat (PDF) response documents for sealed bids may not be available until after the bid request has closed.

Once you click on the Documents icon, the system will display a list of available documents. Tabulation and award documents may not be available until after the bid has been awarded.

Bid Request Addendums

If a buyer needs to make revisions or corrections to an issued bid request, the system offers the ability to create and issue addendums. When this happens, the system will send addendum notifications to you via email. The buyer may elect to "unsubmit" or "return" your bid response to you. If the buyer does this, you will be required to login to the system in order to review the addendum changes, edit your response if necessary, and re-submit your response. The e-mail notification will clarify what actions are required from you in response to the addendum.

Once you have logged into the system, you will be able to view the addended bid. The system will clearly flag the areas of the bid request that were changed as a result of the bid addendum. Please note that the system will always display the most current version of the bid request, incorporating all changes made. This eliminates the traditional confusion of reconciling initial bid request versions with multiple addendums. The detailed audit history of all addendum changes can

be viewed by selecting the 'Bid History' menu bar icon. **It is your responsibility to review the addendum changes and make any necessary revisions to your response!**

Figure 12. Bid History Including Addendum Auditing.

Retracting a Submitted Bid Response

If the buyer allows response retractions, you will have the ability to retract a bid response that you have submitted before the bid closing date & time. Retracting the bid response places the bid response back into the draft status, which will allow you to make changes and then re-submit the bid response.

Select "Retract" from the menu bar
Choose "Edit"
Edit the Bid

A retracted response is no longer valid, so if you are making changes, be sure to resubmit it before the closing time!

Select "Submit" – when you are ready to submit your revised response.

Navigating the System

After login, the Supplier's home page starts in the Bids Tab.

Bid Lists

Includes a listing of Recent Invitations and Draft Responses.

Sub Tabs include: Bid Requests, Bid Responses, and Bid Awards. Each Sub-Tab.

Bidding Shortcuts
- **View Available Bids** – Click to view a listing of all bid requests. See *Bid Requests Sub-Tab* section.
- **View My Draft / Submitted Responses** – Click to view this listing. See *Bid Responses Sub-Tab* section.
- **View My Closed Responses** – Click to view listing. See *Bid Awards Sub-Tab* section.

Account Information
- **Company Profile** – Click to edit bidder's company profile data. *See Maintaining Your Company Profile.*
- **Commodity Registration** – Click to edit bidder's commodity associations. *See Maintaining Your Company Profile.*

- **Manage My Account** – Click to edit bidder's user profile. *See Maintaining Your Company Profile.*

Bid Lists - Core Details

The following core details are present in the following lists:

1. **My Invitations**
2. **Other Bid Opportunities**

- **Bid Number** – Assigned by the buyer.
- **Organization** – Company, Agency, Entity, or Department responsible for the bid request.
- **Bid Title** – Descriptive title for the bid request.
- **Bid Type** – Defines the procurement method.
- **Bid Issue Date** – Date the bid request was issued and available for supplier responses.
- **Bid Close Date** – Date the bid request will close and bid responses will no longer be accepted.
- **Time Left** – Amount of time left before the bid will close.
- **Response Status** – Displays bidders current response status:
  - **No Response** – Bidder has not viewed or acted upon this bid request.
  - **Viewed** – Indicates bidder has looked at the bid request.
  - **Edited** – Indicates bidder has created and saved a bid response. This bid response has **not** been submitted or confirmed by the system.
  - **Submitted** – Indicates bidder has successfully submitted a bid response.
  - **Retracted** – Indicates bidder's bid response has been withdrawn. Bid Response <u>must</u> be Submitted again if bidder desires to participate in this bid request with a confirmed bid response.
  - **Disqualified** – Bid Response has been disqualified. Bidder may no longer participate in this bid request.

Click on desired **Bid Number** to view and/or respond to the bid request.

My Recent Draft Responses

Displays a listing of Bidder's Draft (Edited) Bid Responses. Designed to show Bidders a listing of "in progress" responses. See *My Recent Invitations listing* section for a complete explanation of each column heading.

<u>Bid Requests</u>

Available Bids

Displays a listing of all available bid requests in the system.

Figure 13. Available Bids Tab

The Available Bids listing is divided into two sections:

- **My Invitations** – This list will display to you all the invitations you have received manually from a buyer or automatically based on your selected commodity codes.
- **Other Bid Opportunities** – This list displays all other bid requests that are available in the system that did not match your commodity profile.

On the Available Bids listing, you have the following menu bar actions:

- **View** – Will display the bid request, allowing you to review and respond.
- **Documents** – Will allow you to view documents associated with this bid request. These documents can include an Adobe Acrobat (PDF) version of the bid request or a printable version of your submitted bid response.
- **Status** – Will allow you to view the status of a bid.

Closed Bid Requests

The Closed Bids tab takes you to a listing of all bid requests in the system that have closed.

Figure 14. Closed Bids Tab

The Closed listing will display core details of the bid request, including:
- **Bid Number** – This is the bid number assigned by the buyer.
- **Organization** – The organization that issued the bid request.
- **Bid Title** – This is a descriptive title, optionally entered by the buyer.
- **Bid Type** – The bid type is defined by the issuing organization.
- **Bid Issue Date** – The date the bid was issued.
- **Bid Close Date** – The date and time the bid closed.
- **Bid Status** – The current status of the bid request.
- **Response Status** – The system will display your current response status:
  - **No Response** – Indicates that you did not submit a bid response.
  - **Edited** – Indicates that you created a bid response, but did not submit it.
  - **Submitted** – Indicates that you submitted a bid response.
  - **Retracted** – Indicates that you had submitted a bid response, but you retracted and did not re-submit a bid response. After retraction, a bid <u>must</u> be submitted again in order to be considered.
  - **Disqualified** – The buyer disqualified your bid response.

On the Closed Bids listing, you have the following menu bar actions:
- **View** – Will display the bid request, allowing you to review and respond.
- **Documents** – Will allow you to view documents associated with this bid request. These documents can include an Adobe Acrobat (PDF) version of the bid request or Excel bid tabulations.

Bid Responses

Accessing Your Active Responses

This section of the guide will cover the process of accessing all your draft, submitted, and historical bid responses.

Once you have logged into the system, you can access this listing by clicking on the Bid Responses sub-tab, which is located under the Bids tab. There you will see a tab strip containing 2 tabs, Active Responses and Closed Responses. The active response screen displays responses to bid requests that are still open and is divided into two sections - draft bid responses and submitted bid responses.

Draft and Submitted Responses

Figure 15. Active Responses Tab

Draft bid responses can be selected from this listing and be edited or submitted to the buyer. Once a draft bid response has been submitted, it will move to the Submitted Responses.

Closed Responses

The Closed Responses tab under the Bid Responses area offers you the ability to view all your responses to bid requests that are no longer open for bidding.

Figure 16. Closed Responses Tab

On the Closed Responses listing, you have the following menu bar actions:
- **View** – Will display your bid response.
- **Status** – Will allow you to view the status of a bid.
- **Documents** – Will allow you to view documents associated with this bid request.

Viewing Awarded Bids

The system offers a consolidated listing of bid requests where you have been awarded business. This is accessed by clicking on the Bid Awards sub-tab under the Bids main tab.

Bid Awards

Status   View

	Bid Number	Bid Title	Bid Type	Award Date ⁊	Lines Awarded	Award Total
☐	10/2005-02	Library supplies	Open Bid Request	05/23/2006	2	$1,569.00
☐	BLD-5/2006-3	Landscaping Materials	Blind Bid Request	05/23/2006	1	$659.00
☐	120205-01	Paper	Blind Bid Request	05/22/2006	1	$489.75
☐	RFP-02/2006-10	General Tool Replacement	Sealed Bid Request	05/18/2006	1	$632.28
☐	RFP-04/2006-14	Pottery Equipment	Sealed Bid Request	05/17/2006	1	$.00
☐	BLD-1/2006-15	Chemistry Lab	Open Bid Request	05/17/2006	1	$1,050.00
☐	B-1/2006-3 Addendum 1	Library supplies	Open Bid Request	05/17/2006	2	$387.00
☐	RFP-1/2006-11	Micro-biology lab supplies	Sealed Bid Request	05/02/2006	2	$3,739.50
☐	BLD-1/2006-16 Addendum 1	Office Supplies	Blind Bid Request	03/23/2006	4	$24,947.72
☐	BLD-1/2006-23	Horticulture Club	Blind Bid Request	03/23/2006	1	$150.00

Figure 17. Award Summery Display

The listing offers the following information.
- **Bid Number –** The buyer-assigned number.
- **Bid Title** – The buyer-assigned title.
- **Bid Type** – The buyer-assigned bid type.
- **Award Date –** The date the actual award was completed.
- **Lines Awarded –** The number of line items that were awarded to you.
- **Award Total –** The total dollar amount of the item you were awarded.

The following actions can be taken by using the icons on the menu bar
- **Status –** Navigates to the awarded bid request. The display will contain the header information and the items you were awarded.
- **View** –Displays the original bid request.

Please note that the awarded bid request displayed to you in the system should NOT be used in lieu of a traditional purchase order and/or contract unless specifically instructed by the buyer. If your provide goods or services to the buyer without a purchase order and/or contract, you do so at your own risk.

Maintaining Your Company Profile

Once you have logged into the system, you can maintain your Company Profile by choosing the Admin tab, followed by the Company Profile sub-tab. A tab strip will open, which offers access to the various sections of your company profile. The tabs include:

- **Profile –** A snapshot of your corporate profile which allows editing.
- **Commodities** – Lists the commodities currently assigned to an organization. You may also add or delete commodities from your profile. Commodity codes are added and deleted by choosing "edit". When the screen changes, choose "select". The commodity code list screen allows the user to add or delete codes from the organization profile.
- **Special Classifications –** Suppliers can "register" for a special classification. Once the registration request is submitted, the buyer approves or rejects the request. The request and classification status displays in the last column of the listing.
- **Address Book –** Create, edit or delete supplier addresses in the address book. Company and billing address default options are available for suppliers who require it.
- **Users –** Create, edit and activate/deactivate users within your organization.

Figure 18. Company Admin Tab-Strip

Company Profile

The Profile tab allows you to view and edit your company's details. To make changes to your company's profile, click the 'Edit' button. Click 'Save' once you have completed your profile edits.

Figure 19. Edit Company Profile.

The Company Profile contains all of the information about your company that you entered during the registration process. This information may vary depending on what information the buyer wishes to collect.

Commodity Codes

The Commodities tab provides access to edit your commodity registration profile. This information is provided to the buyer and is also used for automated bid request notifications from the system.

To add or delete a commodity, choose "Edit" under the commodities tab.

Figure 20. Edit Commodity Classification

Choose "Select" to continue the editing process

Figure 21. Select a Commodity Classification

Choose "select" next to your chosen commodity from the table on the left if you want to add a commodity.
Choose "delete" next to your chosen commodity from the table on the right if you want to delete a commodity.
Choose "save selections" after adding or deleting a commodity.
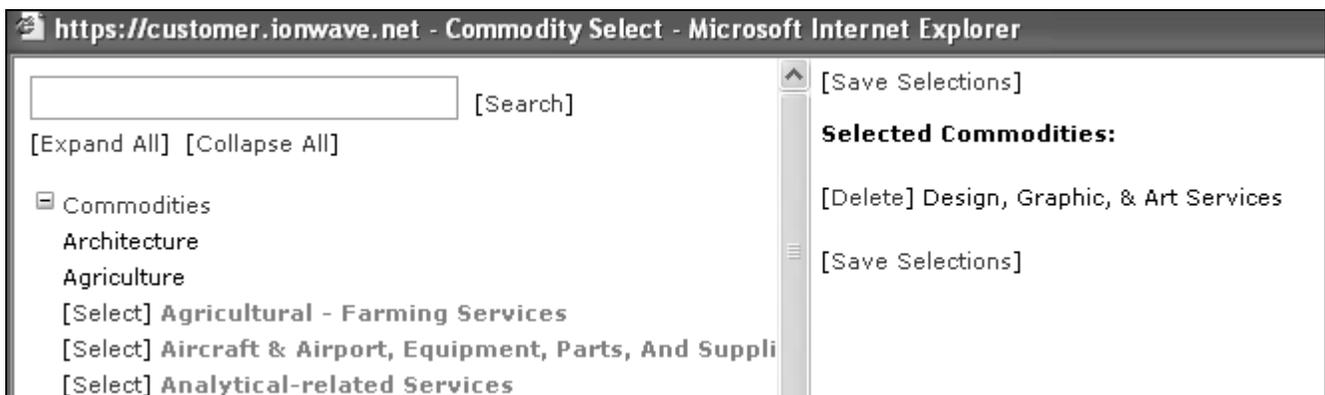
Figure 22. Adding or Deleting a Commodity Classification

Special Classifications

Special classifications are commonly utilized to track diversity classifications such as Women Owned Business, Small Business Enterprise, or Minority Owned Business. The Special Classification tab will display what classes you have registered for, what classes you are approved for, and provide you the ability to apply for additional classes.
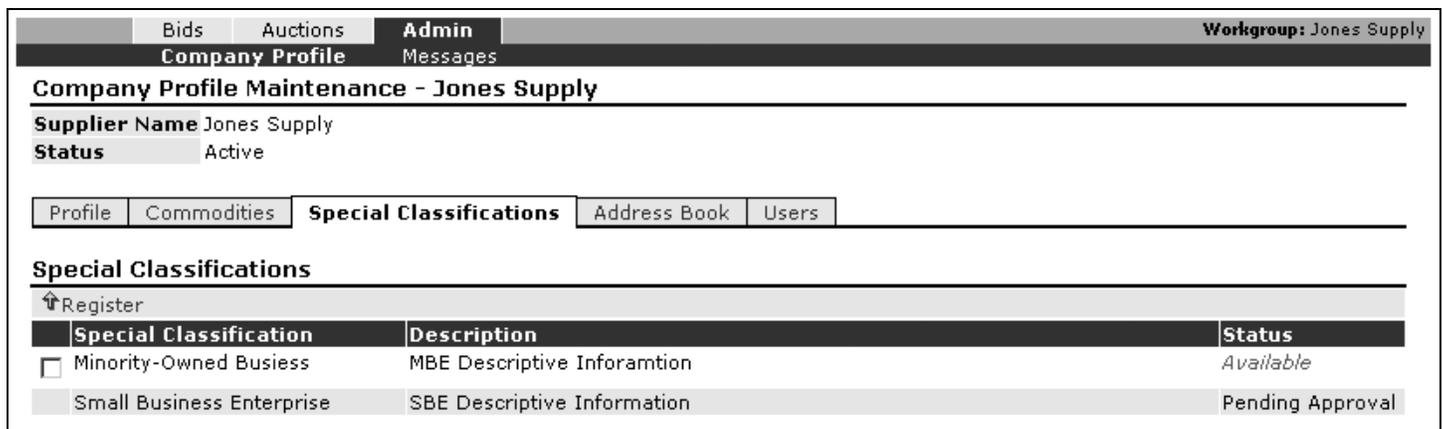
Figure 23. Special Classifications Tab

If you wish to apply for an additional classification, checkmark the classification and click the Register icon. The system will provide you an opportunity to enter notes about your application. Once you have clicked the Save icon, the administrator responsible will be notified of your pending registration.

Please note that the system only tracks and reports on the buyer's decisions regarding special classifications. The system does not automate any diversity or special classification membership.

Company Addresses

Manage your company addresses in your system profile. These addresses are displayed on your bid responses.

Figure 24. Address Book

In the address book listing, you can take the following actions:
- **New –** Enter a new Address to your address book
- **Edit –** This will allow you to edit an existing address.
- **Delete –** Remove an address from your address book.

When editing an address, the system will allow you to specify a default company address and a default company billing/remittance address.

User Accounts

The Users tab will allow you to maintain your company's user accounts, edit/delete existing users, and/or add additional users for your company.

User accounts include the following information:
- **User Name** – This is the user name you use to login to the system. You can change your user name as long as the new user name is not already in use.
- **First Name –** Your first name. This is a required field.
- **Last Name** – Your last name. This is a required field.
- **Title** – Your title.
- **Email** – Your e-mail address. This is the e-mail address the system will use to notify you of bid requests and award decisions. This is a required field.
- **Phone** – Your phone number.
- **Fax** – Your fax number.
- **Time Zone** – Your time zone. This will control how the system displays dates and times to you.
- **Roles** – You can assign roles to user accounts by clicking the Roles icon. Typically, the system will offer you the ability to make someone an administrator who can perform all actions for your company, or allow you to limit an

account to only the bidding or auction sections of the system. It is important to note that you must checkmark one of the roles assigned to the user as their default role or they will be unable to login to the system.

Figure 25. User Account Profile

Forgotten Password

In the event that you forget your password, please use the 'Forgot Password?' link on the log in page.

Figure 26. Forgot Your Password Link

You will be directed to a new screen where you will enter your user name and email address.

Figure 27. Password Reset Page

The system will generate a new password and send it to the email listed in your account profile. If you require the password to be sent to an alternate email address or you have forgotten your user name, contact the system administrator for additional assistance.

Messages

The system provides you with an online copy of all e-mails sent by the system to your company. To access this online archive, click on the Admin main tab, and then click on the Messages sub-tab. You will then be presented with a listing of all the e-mail messages sent by the system to your account.

From this screen the supplier can:
- **View** – displays the message online.
- **Acknowledge** – Select and click to Acknowledge messages that require a response.
- **Delete** – deletes a message.

Figure 28. Messages

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