Now it is your turn to practice this task. Reference the steps below to follow the S2C process.

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Exercise 1: Creation and Setup of a Sourcing Project

Steps

A. Create a new Sourcing project

1. From the main menu click **Sourcing**.
2. From the drop down menu click **Create Sourcing Project**.

B. Complete Required Data to Begin a Sourcing Project

1. Enter a description in the **Label** field. – Refer to DATA CARD
2. Select the **Sourcing Project Type** (from drop down menu options).
3. Select **Agency** (If agency didn't auto populate) . – Refer to DATA CARD
4. Enter data in the **Commodity field** – Refer to DATA CARD
5. Non mandatory fields where data should be entered:
   1. Enter name in the **Procurement Officer** field
   2. Enter email address in the **Procurement Officer Email** field
   3. Enter phone number in the **Procurement Officer Phone** field
6. Confirm the box for **'Is a template'** is **not** checked.
7. Confirm the Status field reads **'In Progress'.**
8. Confirm the **Creation date** reads today's date.
9. (Optional) Select Fiscal Year.
10. Click the **Save** button.

C. Set up a Project Team

1. Navigate to the **Setup Team** tab.
2. Enter the name of the individual you wish to add to your project team in the **Select user(s)** field.
3. Select the **Profiles** that the individual should have.
4. Click the **Save** button.

D. Define the Project Schedule

* + 1. Navigate to the **Project Schedule** tab.
    2. Click the **Add a Task** button.
    3. Enter data in the required fields – Refer to DATA CARD
  1. Additional information such as a **Description**, **Parent** **Task**, or **Previous** **Task** can also be entered
     1. Click the **Save & Close** button.

E. Upload Project Documents

1. Navigate to the **Setup Documents** tab.
2. Click the **Create a document** **for this project** button.
   1. Enter data in the required fields – Refer to DATA CARD
   2. Attach the project document using the **Click or Drag** to add files button
3. Click **Save & Close**.

F. Identify Suppliers

1. Navigate to the **Identify Suppliers** tab.
2. Click on the **Select Suppliers** dropdown arrowto gather the appropriate suppliers.
3. Select see all to search for more options.
4. Refer to Data Card for Commodities
5. After Selecting all desired suppliers (by checking the box next to their name), Click the **X** in the pop up window.
6. Click **Save.**

G. Prepare RFx

1) Navigate to the **Prepare RFx** > **Setup** Header tab. Use information from the Data Sheet to complete the following fields:

2)Click **Save**.

H. Prepare RFx Exhibits

1. Navigate to the **Prepare RFx** Tab, **RFx Exhibits** Header tab.
2. Click **Create a Document**.
3. Under **Select a Documents Type** select **Solicitation Documents.**
4. Upload documents and fill in the required sections
5. Based on document complete the required fields:
   1. **Title**
   2. **Document (‘en’)**
   3. **Status**
6. Click **Save & Close.**
   1. Repeat for remaining documents.

I. Prepare RFx Suppliers

1. Navigate to the **Prepare RFx** > **Suppliers** Header.
2. Confirm suppliers selected on the **Identify Supplier** Tab have populated page with a number count.

J. Prepare RFx/Technical Questionnaire, Technical Evaluation Questionnaire (As required by manager)

1) Skip the **Technical Evaluation Questionnaire, Technical Questionnaire**.

K. Prepare RFx Financial Questionnaire & Financial Evaluation Questionnaire

1. Navigate to the the **Prepare RFx** > **Financial Questions** Header tab.
2. Click the **+ Add a line** icon to add a question.
3. Complete the required fields:
   1. Under **Row/Answer** **Type** column, Select **Section**
      1. Enter Section Name from Data Sheet
   2. Enter Section/Question
4. Click the **+ Add a line** icon to add a question.
5. Complete the required fields:
   1. Under **Type** column, Select **Text** 
      1. Enter Question from Data Sheet
      2. Check box for **Required**
      3. Check box for **Question scored**
   2. Enter Section/Question
6. Click **Save**.
7. Click the **Financial Evaluation Questions** Tab
8. Under the Default Evaluators Rules Assign yourself as an Evaluator
   1. Find yourself under the Assign Dropdown
   2. Click the **+Add the Rule** button

L. Prepare RFx Items (F)

1. Navigate to the **Prepare RFx** > **Items (F)** Header Tab.
2. Complete the following fields:
   1. **Code (V):** Is a unique indenter for an item
   2. **Type (V):** Indicate if the item is required, optional, additional fees, etc.
   3. **Label (V):** Description of the Item
3. Click **Save**.
4. Repeat as needed.
5. Click **Action**
6. Click **Grid Settings**
7. Change Grid Label
8. Click **Save & Close**

M. Send Solicitation for Approval

1) Click the **Send Solicitation for Approval** button.

N. Publish RFx

1. Click **Send** buttonon the top of the page.
2. Confirm there is a User contact listed for each of the selected suppliers.
   1. If one is not listed, use the drop down menu in the **User** field to select.
3. Review the email communication at the bottom of the supplier list:
   1. Modify the subject line to include Solicitation title.
4. Click **Send & Close**.
5. Click **OK** on prompts to release the solicitation.

Now it is your turn to practice this task. Reference the steps below to edit a Sourcing Event.

Exercise 1.5: Changes to the Bid

Options:

Prepare RFx- New Round

If creating a New Round (Solicitation Amendment) ensure to complete the following steps:

1) Under **Prepare RFx** Tab

* 1. Click **Other Actions**
  2. Then, select **Create a new round**

2) Copy and add all tabs to be duplicated, select **Save and Close.**

* 1. **Make applicable edits.**

1. Select **Send Solicitation for Approval**.
2. After approval, Procurement Officer clicks **Send.**
3. Click **Send & Close**.
4. Click **OK** on prompts to release the solicitation.
5. Repeat steps for any new round/solicitation amendment.

Prepare RFX- New Lot – (Not required for training - optional)

If creating a New Lot ensure to complete the following steps:

1. Under **Prepare RFx** Tab,
   1. Click **Other Actions**
   2. Then, select **Create a new lot**
2. Add all tabs to be duplicated, select **Create.**
3. Complete the following required fields:
   1. **RFX Type**
   2. **Label**
   3. **Bid Due Date**
   4. **Publication Begin Date**
4. Select **Send Solicitation for Approval.**
5. After approval, Procurement Officer clicks **Send.**
6. Then, make sure the suppliers you want to send the lot to are selected.
   1. Verify the personalized message when you scroll down
7. Click **Send & Close**.
8. Click **OK** on prompts to release the solicitation.
9. Click **Send and Close.**

Now it is your turn to practice this task. Reference the steps below to evaluate a Sourcing Project’s responses.

Exercise 2: Evaluations of a Sourcing project

Steps

A. View RFx activity

1) Under the **View RFx Activity** Tab, you will be able to view who has **Acknowledged** the RFx, who is interested in submitting an offer, and who has already submitted an offer.

B. Discussion Forum/ Q&A Tab

1) When responding to a question, forward the communication and send to **All Not Blocked Bidders**.

1. All the questions received to date should be uploaded in the **Discussion Forum** as an attachment.

C. Prepare RFx

1. Click theLock under the **Prepare RFx Tab**/**Setup** header or click the **Open Sealed Bids** button.
2. Then click **OK.**

D. Opening Technical/ Financial Envelope

1. To view the suppliers’ proposals, go to the **Open Technical Envelope** Tab
   1. Suppliers response must be marked as accepted to view the **Financial Envelope**.
   2. After clicking **Accept Proposal**, **click Close Envelope.**
   3. Click OK.
2. Now go to the **Open Financial Envelope** Tab.
   1. Under the **List of Proposal** Header, click the **proposal #** link to view the supplier(s) offer.
   2. Download attachments and review.
   3. Once done, select Accept proposal.
   4. Navigate to the **RFx Evaluations** tab
   5. Click the **Penci**l icon to evaluate the supplier’s responses.
   6. Click **Validate** *if no BAFO will be conducted*

E. Prepare RFx BAFO (if applicable)

1. Under the **Prepare RFx** Tab, click **Other Actions** and select **Create a new round**.
   1. Copy over all desired fields from the previous round.
   2. Uncheck the “Post to the Public Portal” box. This will make the BAFO private to the suppliers you select.
      1. In the setup tab open the **Advanced Options** menu
      2. Checkbox for Post to the Public Portal should be unchecked.
   3. Complete required fields, RFx type, label, bid due date.
   4. Select save
2. Under the **Prepare RFx** Tab, **Supplier** Header. Confirm that only the suppliers invited to the BAFO round are invited.
3. Attachment Line should read: BAFO - Submit Offeror Response to include the requirements stated in the Special Instructions of Offerors.
4. After approval, click **Send.**

F. After bid opening date has been reached

1) Open submitted responses.

2) Navigate to **Open Financial Envelope**.

3) Click the **RFx Evaluation** tab.

4) Click the **Checkbox** of the response you would like to review.

5) Click the **View and Score Evaluations** button.

6) Evaluate Responses

7) Click the **Submit Evaluations** button.

8) Click the **X** to close the popup

9) Click **Validate.**

Now it is your turn to practice this task. Reference the steps below to award a Sourcing Project.

Exercise 3: Awarding a Sourcing Project

Steps

A. Set up documents (optional)

1. Skip for now. You must create the *procurement file* outside of APP. You will upload this file in APP under **Exhibits** once the contract is created.

B. Analyze & Award

If one supplier is awarded:

1. Under the **Analyze & Award** Tab --> **Proposals** Header
   1. Select the Awardee and Non-Awardee(s) by clicking on the Decision icons displayed

If multiple suppliers are awarded:

1. Under the **Analyze & Award** Tab --> **Awarding** tab --> **Manually Award** Field.
   1. If you choose **Percentage**, ensure there is an even number of suppliers being awarded.
2. Then, **click Save** andthen **Confirm Award.**

C. Synthesis/ Create a Contract

1. Click **Select to be notified** next to each applicable supplier under the **Synthesis** tab.
2. Then, click **Create/Update a Contract** next to the supplier.
3. Complete the following fields:
   1. Confirm **New Contract** is selected
   2. **Label** (Contract Name)
   3. **Type** (Type of Contract)
   4. **Contracting Agency**
4. Once finished completing and reviewing the required fields, click **Save & Close.**
5. Do this step for every supplier being awarded.

Now it is your turn to practice this task. Reference the steps below to complete the contract after awarding the Sourcing Project.

Exercise 4: Completing the contract

Steps

A. Completing the contract fields

1. Navigate to the CTR number that was created in the previous activity under the **Synthesis** tab.
2. Complete and/or review the following fields in the *Header, Contacts,* and *Dates and Renewals* Tabs in order to make the contract valid:
   1. **HEADER:**
      * Label
      * Contract Description *(if applicable)*
      * Contracting Agency
      * Agency Project ID *(if applicable)*
      * Federal Project ID *(if applicable)*
      * Alternate Contract ID *(if applicable)*
      * Agencies
      * Commodities
      * Co-Op Contract Designation
        + *Yes or No*
          - If yes, add Co-op Percentage *(in decimal format)*
      * Statewide Contract Checkbox *(if applicable)*
      * Effective Date
      * Initial End Date
      * Notification Date
        + Notification Duration
      * Evergreen?
      * Click **Save**.
   2. **CONTACTS:**
      * Select Team Members to Add *(If applicable)*
      * **Select Existing Contact** under Supplier Contacts *(if not already populated)*
      * Click **Save.**
3. Next, you have the option to upload/modify line items in the **Price List** tab.
4. Completing the Contract Exhibits
5. Navigate to the **Documents** tab.
6. **Select RFP Documents To Add.** You must include the following at a minimum:
   * 1. Procurement File
     2. Contract Document
     3. Certificate of Insurance
7. Then, click **Save and Close**.
8. Completing the contract/Notifying the suppliers
9. Select **Send to Draft** when the contract is complete.
10. Then, click **Send Contract for Approval**.
11. Now, click **Signed.**
12. Once the contract is valid, go back into the **Header** to confirm the **Public** checkbox is marked.
13. Select **Save and Close.**