Sourcing & Contracting

User Guide

July 2018, Version 3

Revisions to this Document

NOTE: This Revision History section is used to document changes made to this Design document after the testing phase has started.

Revision	Revision Date	Revised By	Area of Revision	Description
3	July 2018	Tracy Robinson	N/A	Version 3

Introduction

The Commonwealth has implemented a VBO solicitation/award posting system called Sourcing & Contracting. Solicitations created using Sourcing & Contracting will automatically be posted to the eVA public posting page, VBO. Buyers utilize VBO to post advertisements for business opportunities. To view vendor notifications, amend, cancel, or change the status of a solicitations created using the Advanced VBO/Full Advantage, users will need to use Advanced VBO/Full Advantage. VBO is the official state web site for posting solicitation, addenda, and award actions. It is also the official site for posting solicited and unsolicited proposals under the Public-Private Education Facilities and Infrastructure Act of 2002 (PPEA) and meets the public posting requirements of the Public-Private Transportation Act (PPTA).

This user guide is for Sourcing & Contracting. To use this application, users must have an eVA login and be granted access to the Sourcing & Contracting tool. The setup required for a user can be requested either from the Agency eVA Team Lead or the DPS Account Executive.

If you are with a Local Government or a Public Body, you can request access on-line at https://dgs.virginia.gov/procurement/eva---virginias-eprocurement-portal/eva-customer-care-forms/eva-buyers-local-government-and-public-bodies-registration/.

Public Posting Requirements

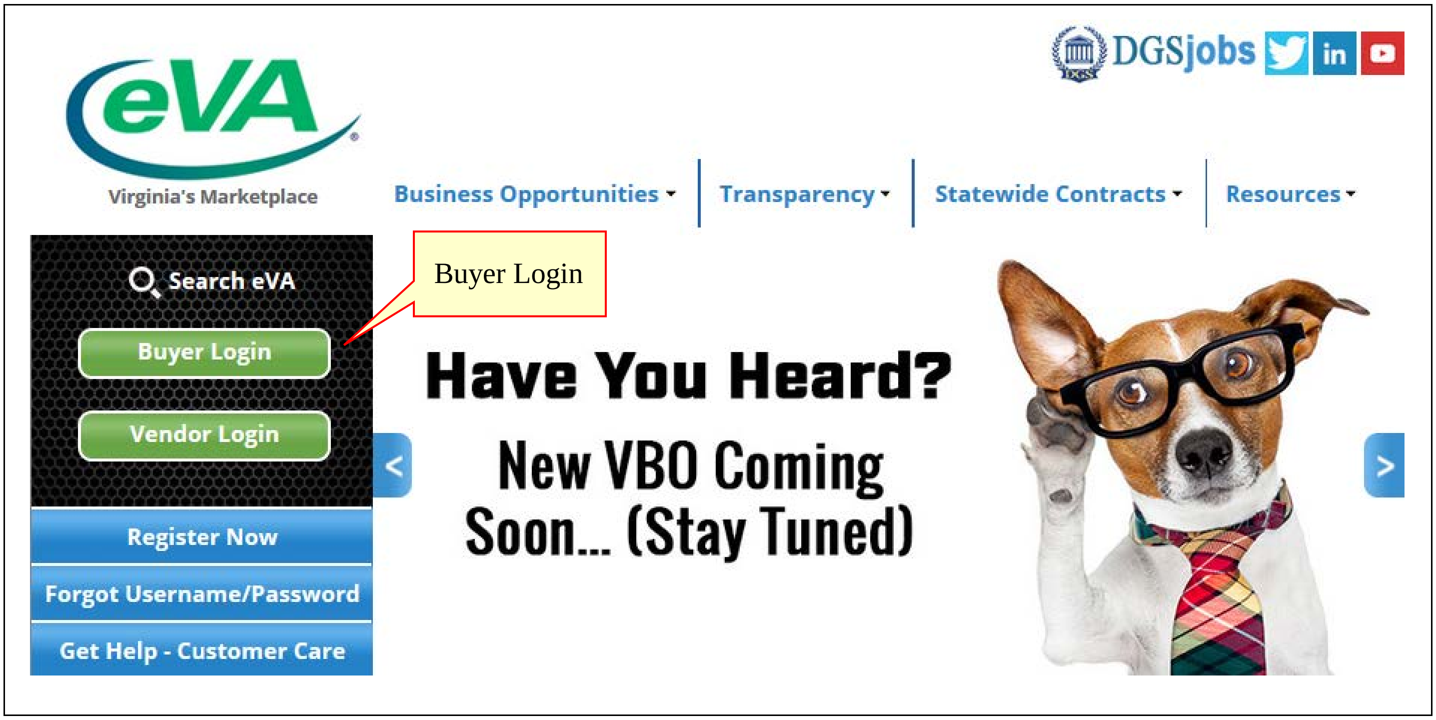
Users should be familiar with the public posting requirements that govern their organization. For most State Agencies and Institutions, the following references apply:

Document	Chapter/Section	Topic
Agency Procurement Surplus Property Manual (APSPM)	3.18	Publicly Posted Notices
	8.5	Sole Source
	9.3b	Emergency
Code of Virginia	2.2-4301	Award Notice Posting
Public-Private Education Facilities and Infrastructure Act of 2002, as amended	Section III.	Solicited Proposals
	Section IV. A. 3. a. and Section IV. B.	Unsolicited Proposals
Public-Private Transportation Act of 1995, (as Amended) Implementation Guidelines	Sections 2.3 & 3.2	Unsolicited Proposals

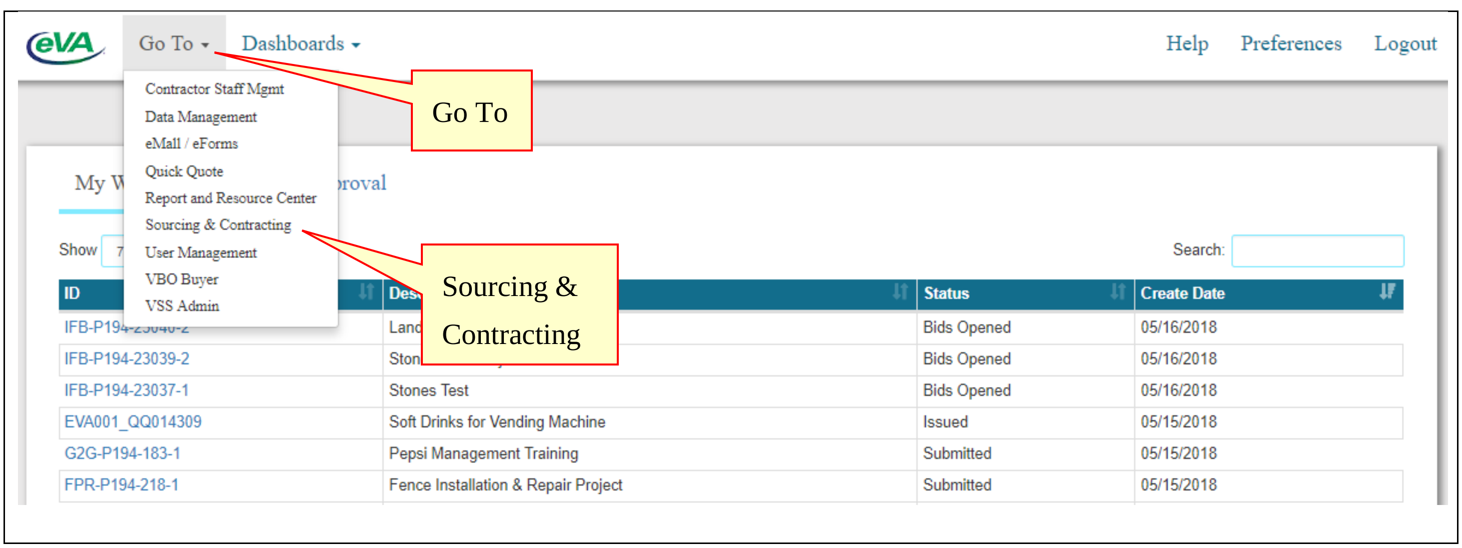
Sourcing & Contracting Navigation

Accessing Sourcing & Contracting

From the eVA Home Page, www.eva.virginia.gov, log in at the Buyer Login with your user name and password.



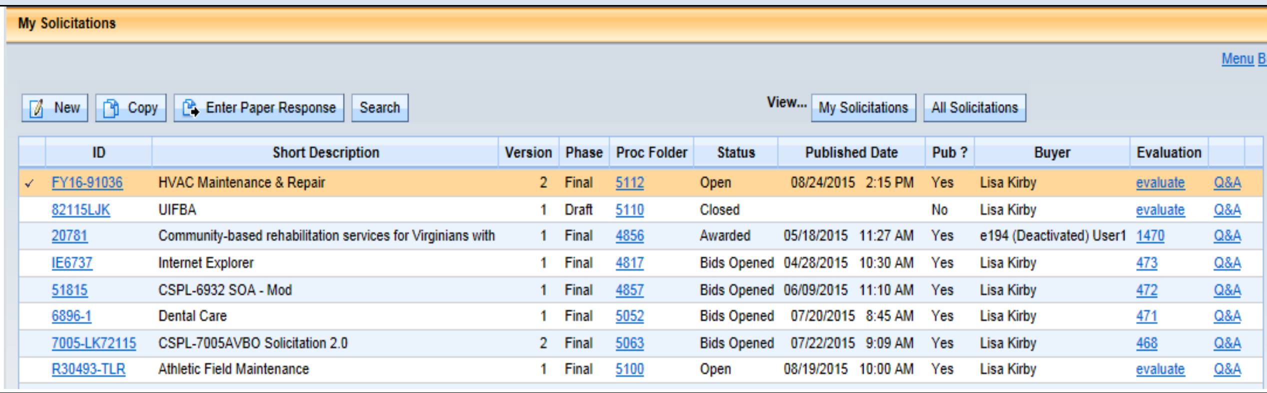
From the portal navigation panel, click on the **Go To** drop-down and select **Sourcing & Contracting**.



Sourcing & Contracting Home Page

The first page you see in Sourcing & Contracting is the home page you select and will vary between users.

Which home page is best for me?
My Solicitations – Basic search page for VBO public postings; it displays existing solicitations you created in the grid (table). All Solicitations button filters your entities solicitations and is filtered by security, such that users can see all advertisements for their purchasing organizations (department/unit) they are authorized for. Additionally, there is quick access the procurement folder and to completing the next action (view, amend, or cancel a solicitation; enter paper responses; post Notice of Intent to Award or Notice of Award; and access Question & Answers). Recommended: Users posting solicitations within Sourcing & Contracting. Page Code: **BUYRHM**



My Solicitations

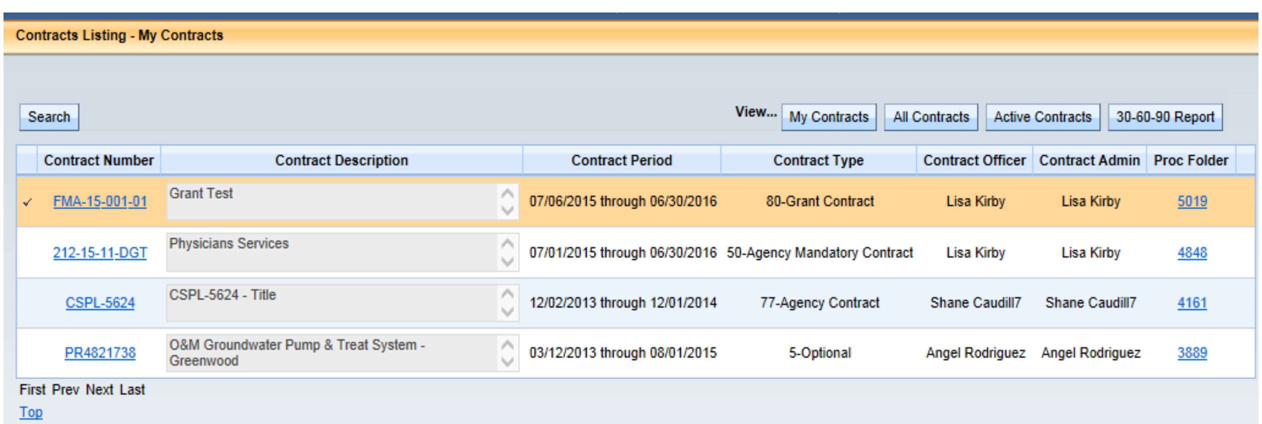
Menu Ba

New | Copy | Enter Paper Response | Search

View... My Solicitations | All Solicitations

	ID	Short Description	Version	Phase	Proc Folder	Status	Published Date	Pub ?	Buyer	Evaluation	
✓	FY16-91036	HVAC Maintenance & Repair	2	Final	5112	Open	08/24/2015 2:15 PM	Yes	Lisa Kirby	evaluate	Q&A
	82115LJK	UIFBA	1	Draft	5110	Closed		No	Lisa Kirby	evaluate	Q&A
	20781	Community-based rehabilitation services for Virginians with	1	Final	4856	Awarded	05/18/2015 11:27 AM	Yes	e194 (Deactivated) User1	1470	Q&A
	IE6737	Internet Explorer	1	Final	4817	Bids Opened	04/28/2015 10:30 AM	Yes	Lisa Kirby	473	Q&A
	51815	CSPL-6932 SOA - Mod	1	Final	4857	Bids Opened	06/09/2015 11:10 AM	Yes	Lisa Kirby	472	Q&A
	6896-1	Dental Care	1	Final	5052	Bids Opened	07/20/2015 8:45 AM	Yes	Lisa Kirby	471	Q&A
	7005-LK72115	CSPL-7005AVBO Solicitation 2.0	2	Final	5063	Bids Opened	07/22/2015 9:09 AM	Yes	Lisa Kirby	468	Q&A
	R30493-TLR	Athletic Field Maintenance	1	Final	5100	Open	08/19/2015 10:00 AM	Yes	Lisa Kirby	evaluate	Q&A

Contract Listing – Displays all contracts where the user is either the Contract Administrator or Contract Officer. Provides quick access to the Procurement Folder, Contract Management, 30-60-90 Report, and additional lists/searches to your entities contracts. Recommended: Users needing information to contracts. Page Code: **CNTRCLST**



Contracts Listing - My Contracts

Search

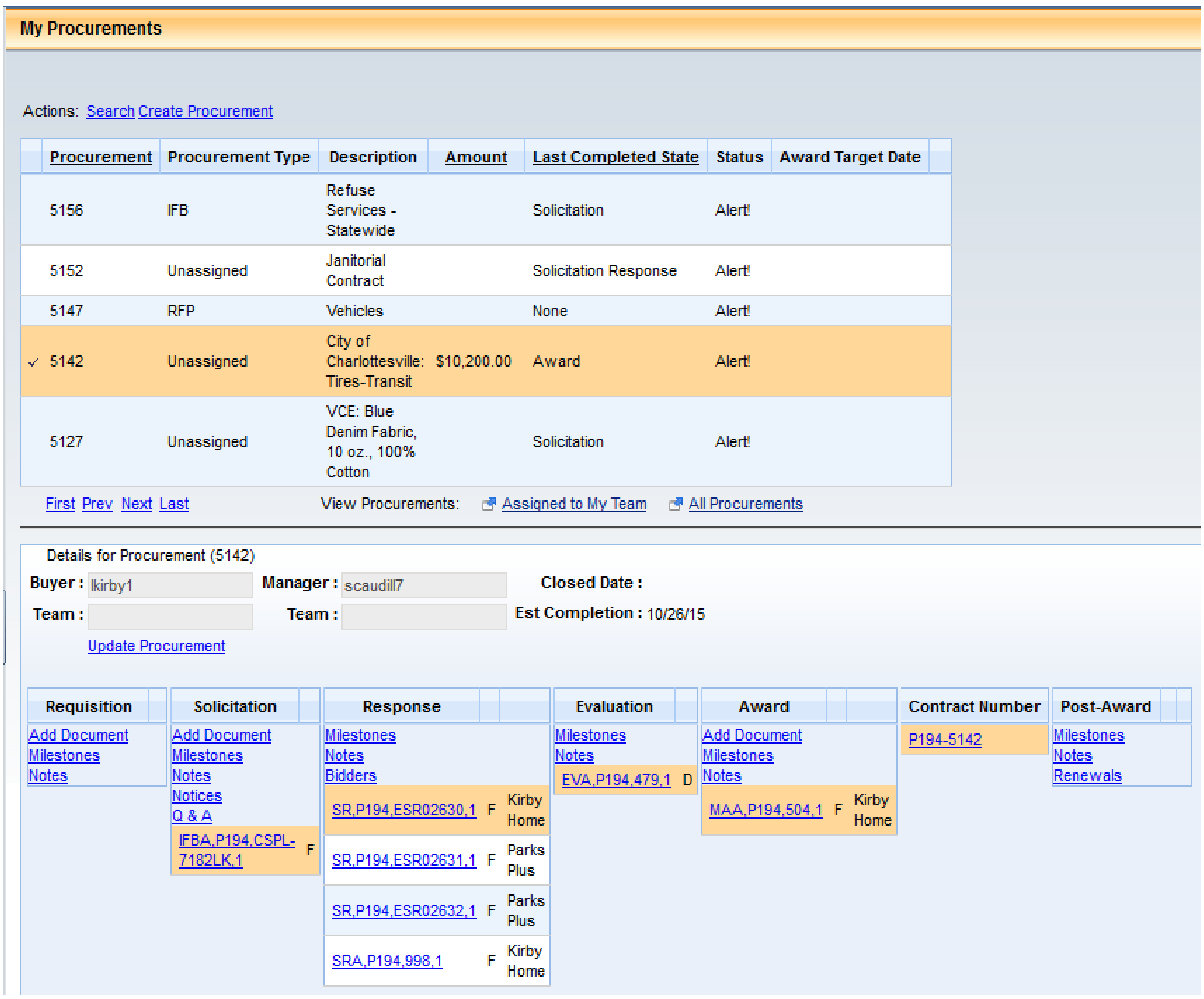
View... My Contracts | All Contracts | Active Contracts | 30-60-90 Report

	Contract Number	Contract Description	Contract Period	Contract Type	Contract Officer	Contract Admin	Proc Folder
✓	FMA-15-001-01	Grant Test	07/06/2015 through 06/30/2016	80-Grant Contract	Lisa Kirby	Lisa Kirby	5019
	212-15-11-DGT	Physicians Services	07/01/2015 through 06/30/2016	50-Agency Mandatory Contract	Lisa Kirby	Lisa Kirby	4848
	CSPL-5624	CSPL-5624 - Title	12/02/2013 through 12/01/2014	77-Agency Contract	Shane Caudill7	Shane Caudill7	4161
	PR4821738	O&M Groundwater Pump & Treat System - Greenwood	03/12/2013 through 08/01/2015	5-Optional	Angel Rodriguez	Angel Rodriguez	3889

First Prev Next Last
Top

<u>All Procurements</u> – Provides table of all procurements with the procurement folder view below. Provides quick access to the documents within the Procurement Folder.
Recommended: Entities issuing solicitations in Sourcing & Contracting.
Page Code: **ALLPROCS**

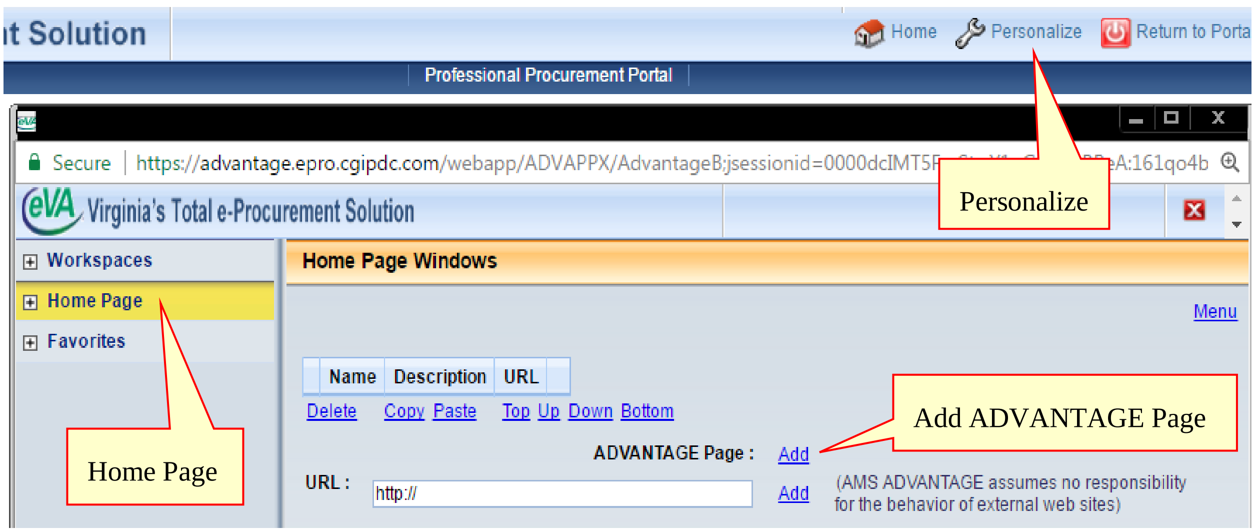
<u>My Procurements</u> – Similar to All Procurements, however, only displays procurement folders that have been assigned to the user.
Recommended: Entities beginning solicitation in Sourcing & Contracting.
Page Code: **MYPROCS**

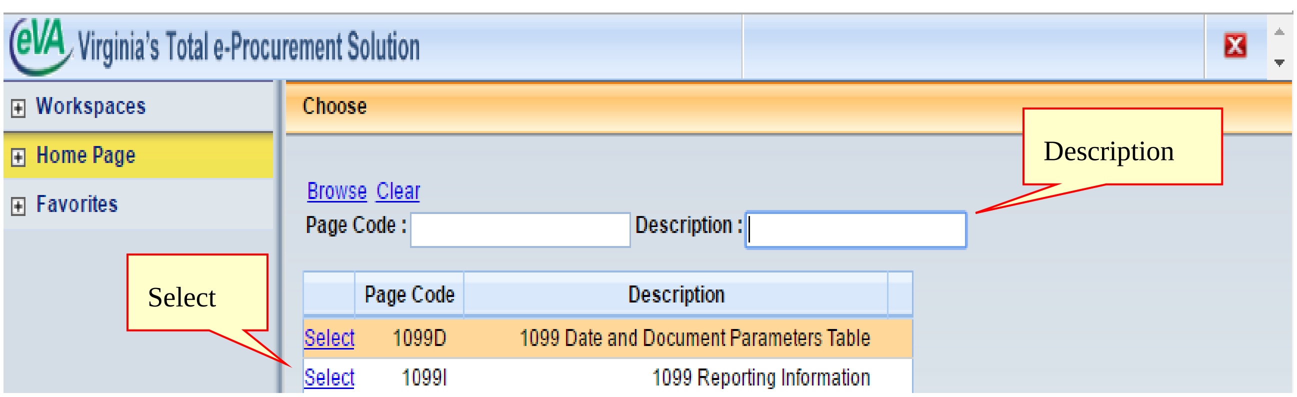


Setup Sourcing & Contracting Homepage

SETUP YOUR HOMEPAGE

1. Click Personalize button (top right) and a new window will launch.
2. Click Homepage (left navigation menu).
3. Click Add link next to ADVANTAGE page.
4. Click to search and Select a page (see page suggestions below).
5. Close window.



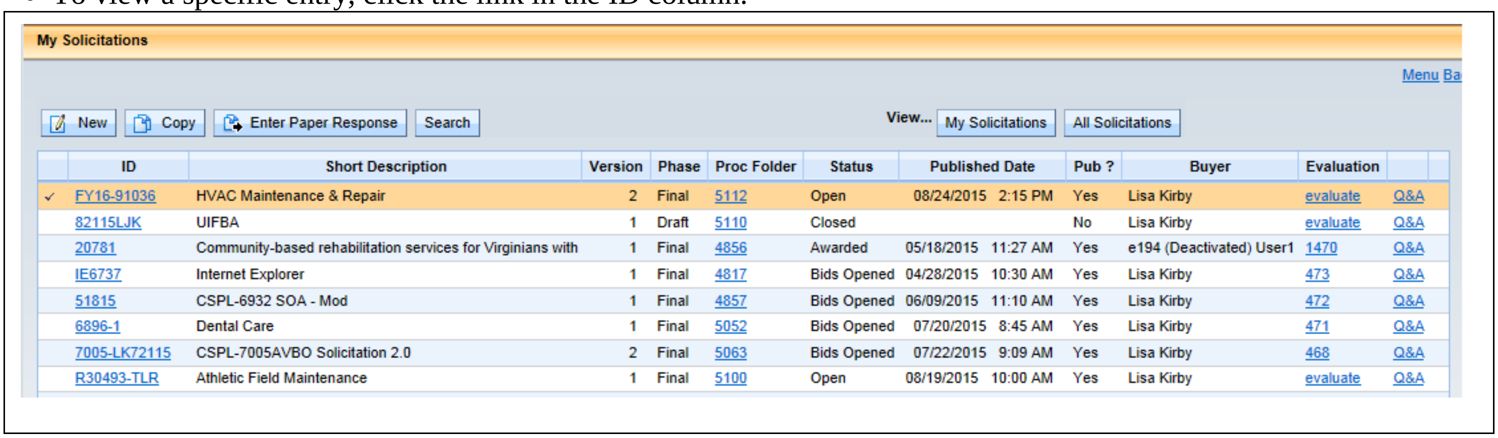


Create, Update, and View Documents

From the left hand navigation menu, users can access dashboards setup for Solicitations, Contract Records, and Procurement Folder views.

Viewing the List of VBO Public Postings

- Click View under the left hand navigation tab and My Solicitations.
- The most recently entered public postings you created will be displayed.
- Page through list with the **First, Prev, Next, and Last** buttons.
- To view a specific entry, click the link in the ID column.



	ID	Short Description	Version	Phase	Proc Folder	Status	Published Date	Pub ?	Buyer	Evaluation	
✓	FY16-91036	HVAC Maintenance & Repair	2	Final	5112	Open	08/24/2015 2:15 PM	Yes	Lisa Kirby	evaluate	Q&A
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	7005-LK72115	CSPL-7005AVBO Solicitation 2.0	2	Final	5063	Bids Opened	07/22/2015 9:09 AM	Yes	Lisa Kirby	468	Q&A
	R30493-TLR	Athletic Field Maintenance	1	Final	5100	Open	08/19/2015 10:00 AM	Yes	Lisa Kirby	evaluate	Q&A

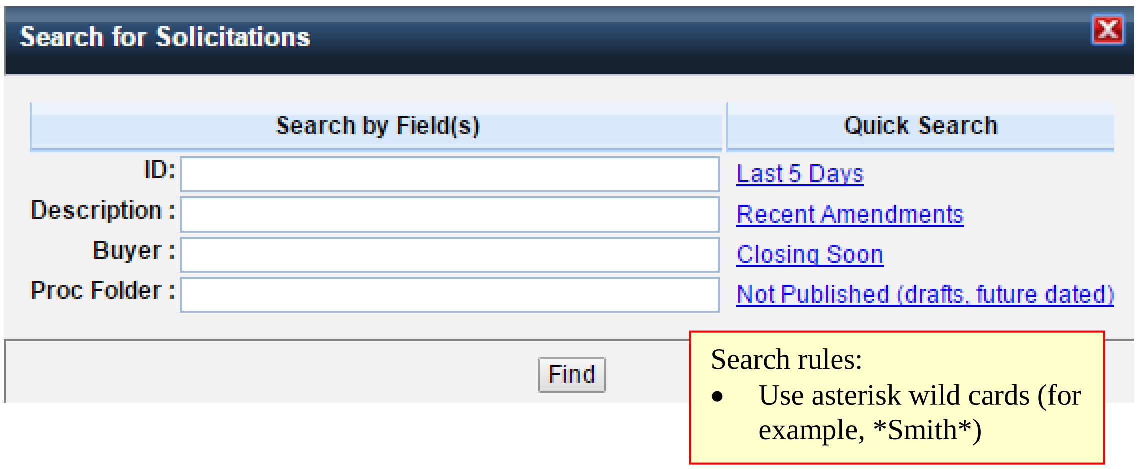
What You Can Do Next

At this point you can:

- Search for and access an existing VBO public posting created by you or others in your department or unit.
- Create a new VBO advertisement.
- Edit/change unpublished postings.
- Delete an unpublished posting (prior to Publish Date & Time).
- Post Amendments/Addenda to a Published posting.
- Cancel a Published posting (prior to Closing Date & Time).
- Access and view the Vendor Notifications that lists the vendors that have been “pushed” (sent notices).
- Post Bid Opening, Notice of Intent to Award, Notice of Award and No Award information and attachments for a closed advertisement.

Using the Search Feature

Search the list of advertisements by clicking the **Search** button and entering your criteria.



Use the asterisk (*) as a wild card before and after the search term if you are searching on the Buyer Name. To return to the full list, select the **Search** link again and select **Clear** to remove your prior search terms and click on **Ok**.

Note: *Seaches are case sensitive.*

Post a Solicitation

The following steps will guide you through creating a solicitation document that will simultaneously (1) publish to the eVA public posting page; (2) notify vendors; and (3) create an electronic procurement folder with the solicitation record and notification list.

The solicitation document describes the goods or services being requested or offered for sale. A solicitation document can reference all Requisition (RQN) documents if using Copy Forward and can also reference the evaluation documents created in the next step.

Solicitation documents contain much of the same information; however, the lots and line items section and the evaluation group criteria section are available based on the procurement method of the solicitation document.

- If creating a solicitation document with lots and line items, one lot and line item is required.
- If creating a solicitation with evaluation group criteria, the section is optional.

Solicitation Documents:

Public Posting/ Document Type	Solicitation Document	Document Code	Lockbox Responses
Solicitation	**Solicitation documents with Evaluation Groups & Criteria**		
The solicitation will follow routine procurement rules. **<u>Notification</u>** will be sent automatically to vendors by email or fax based on their preferred notification method. Vendors will be notified based on their selected commodity codes as compared to the commodity codes on this public posting.	2 Step IFB	2STP	X
	Best & Final Offer	BAFO	X
	Construction Management	CMR	X
	Design-Build	DB	X
	Design-Bid-Build	DBB	X
	Private Ed. Facilities & Infrastructure	PPEA	X
	Public-Private Transportation Act	PPTA	X
	Request for Information	RFI	X
	Request for Proposals	RFP	X
	Solicitation documents with Lots & Line Items		
	Emergency (Solicitation)	EMG	X
	Invitation for Bids	IFB	X
	Invitation for Qualified Contractors	IFQC	X
	Reverse Auction	RA	
	Request for Quotes	RFQ	X
	Surplus Auction (Sale of goods)	SPL	
	Sole Source (Solicitation)	SS	X
	Unsealed Invitation for Bids	UIFB	
	Unsealed Request for Proposals	URFP	

Create a solicitation document

1. Click **Create** (left navigation menu) and select **Solicitation**.
2. Click **New** (above *My Solicitations* list).
3. Select the Procurement Method from **Document Code** drop down menu.
4. Select your entity from **Department** drop down menu if not already defaulted.
5. If applicable, select assigned **Unit** from Unit drop down menu (not all users will be assigned a Unit).
6. Click **Create Document**.

What's a Document ID? Each new document requires a unique number. **The Document ID is the solicitation number that is displayed on the public posting (similar to a PR number).** Documents associated with one procurement are stored together in a Procurement Folder. The contract number is established on the Master Agreement that creates the contract record. The solicitation document id is on the yellow procurement folder tab at the top of your solicitation document and visible once the document is created.

The Document ID is auto-generated when the document is created and must be unique to similar document types created by your entity. If your agency has a numbering system you want to continue to utilize, we recommend including that number in the short description or description field so it appears on the public posting page and is also searchable by you and the public.

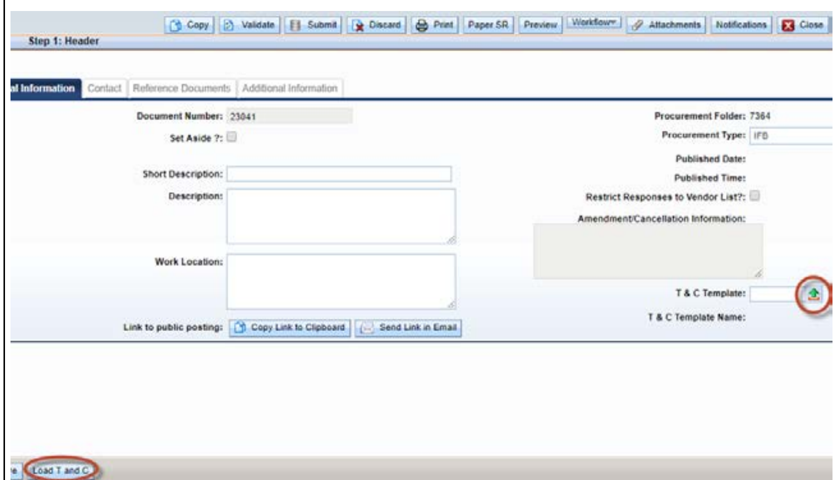
Solicitation Steps

Not all sections will be available for each document type. Sections with dark blue headers below will be available on each document. Required fields have a red asterisk in the guide (*). As you move through each step your solicitation document is automatically saved.

HEADER

GENERAL INFORMATION

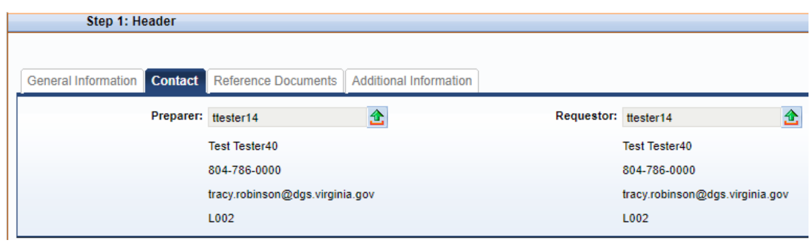
1. **Set-Aside?:** If applicable, click to fill checkbox and select award priority from drop down.
2. ***Short Description:** Enter title of procurement. (60 characters)
3. ***Description:** Enter a brief summary of procurement. (1500 characters).
4. * **Work Location:** Enter location where work will be performed or delivered.
5. Select a template group of **T&C's** using the pick list and click **Load T and C** button.



CONTACT

Preparer and Requestor will default to your user id. To update, click **Contact Info** tab and either type in the eVA user id or search using the pick list .

NOTE: You can select users from other entities. Search by and verify the eVA Dept Code.



LOTS AND LINE ITEMS (will be listed on the IFB Style document)

At least one lot and line item to identify the goods, services, or discount is required on a solicitation containing this section/step. The **Line Type** field controls which fields the buyer is required to complete and also control how the vendor will respond to your solicitation electronically. Select the **Line Type** based on the information you would like the vendor to provide, not the type of commodity.

Goods: Buyer must enter quantity and unit. Vendor responds with unit price.

Services: Buyer must enter service from and to date. Vendor responds with service amount.

NOTE: Vendors can enter up to 12 digits prior to the decimal and up to 2 digits after the decimal (e.g. $25.99) for the Contract Amount on service line items.

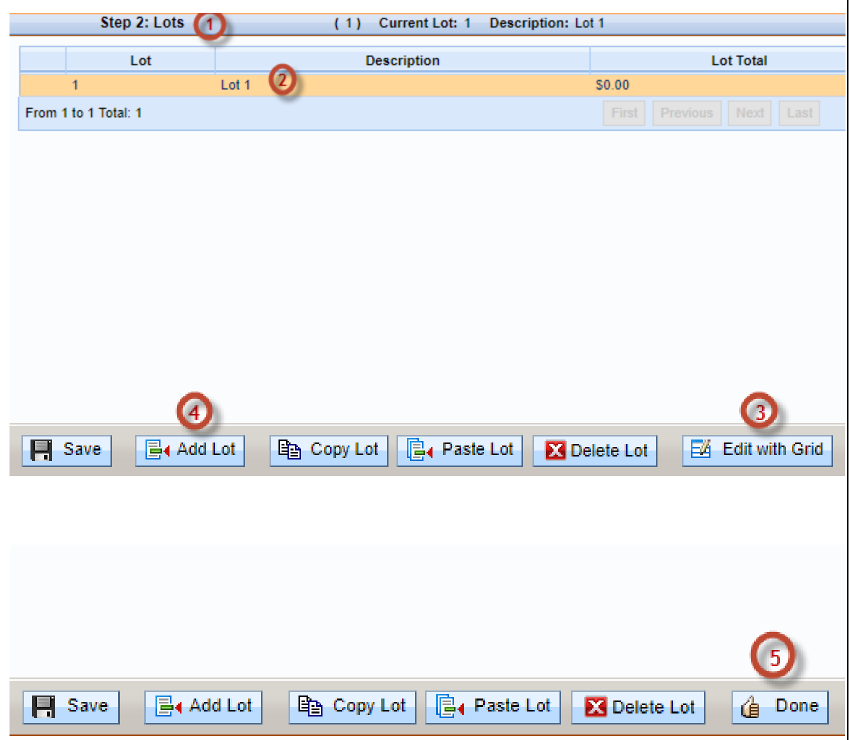
Discount: Buyer must enter Discount Info Catalog and Effective To and Effective from dates. Vendor responds with a percentage.

LOTS

1. Click on the **Lots** bar to enter lot information.
2. To update the **Lot Description** if not already highlighted, click the row description to highlight the lot row yellow.
3. Click **Edit with Grid**. Update the Description.

   NOTE: Lot Total and **Number of Lines** will update as lines are created.
4. To create additional lots, click on the **Add Lot** button and update description or click **Done**.

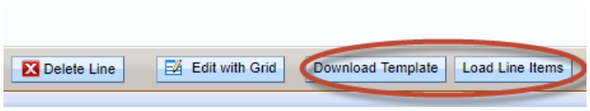
   NOTE: It is recommended to create a lot and enter all line items with the associated lot before creating additional lots.
5. Click **Done** to return to Lot Summary.



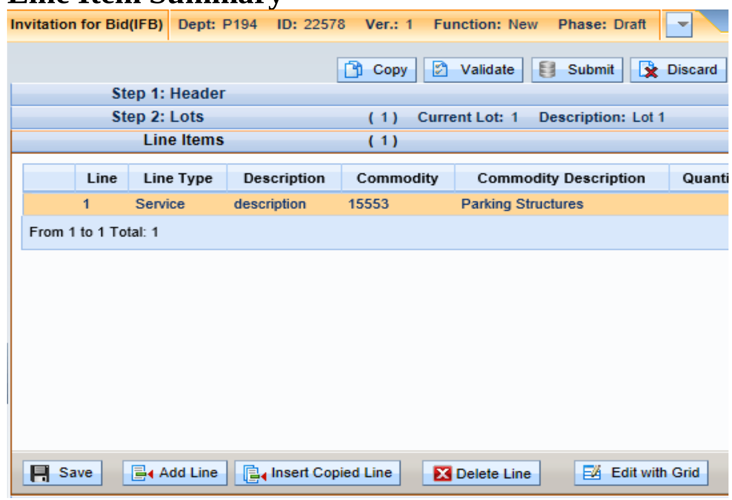
*NOTE: *Please review this section before adding Line Item information.*

LINE ITEMS

Line Item Summary displays all line items that have been entered and provides you options to Add (individual or multiple line items at once via Template), Insert Copied, and Delete Items.



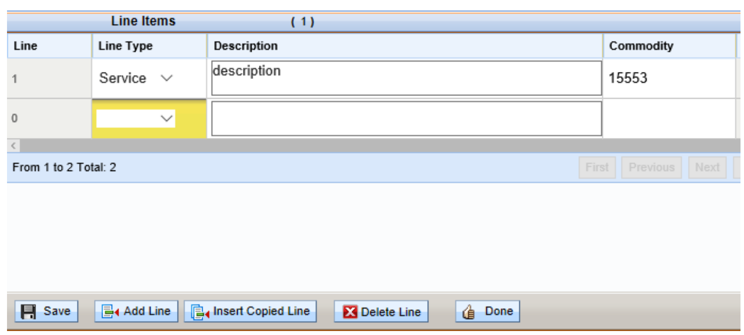
Line Item Summary



LINE ITEMS (cont'd)

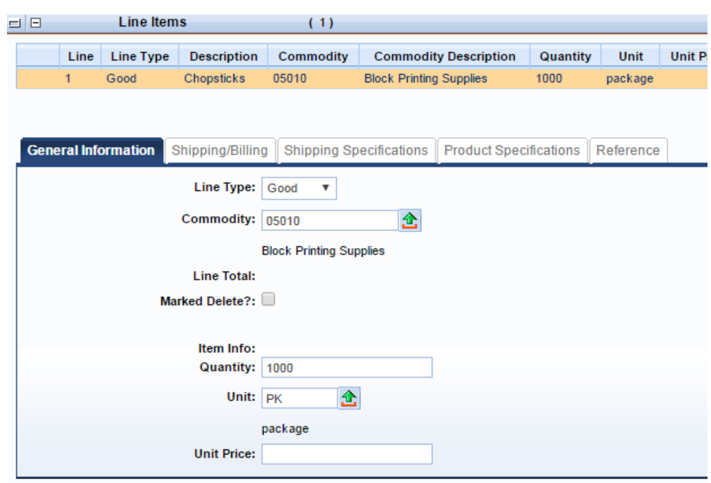
Edit with Grid allows you to update basic line item information. When you click **Add Line** you are taken to **Edit with Grid**. To edit basic information on a line item previously entered from the **Line Item Summary** click **Edit with Grid**.

Edit with Grid



Additional Details such as shipping, billing, or product specifications can be viewed and entered by clicking Show Details  on the **Line Item Summary** page. Click **Show Lines** button to return to **Line Item Summary**.

Additional Details

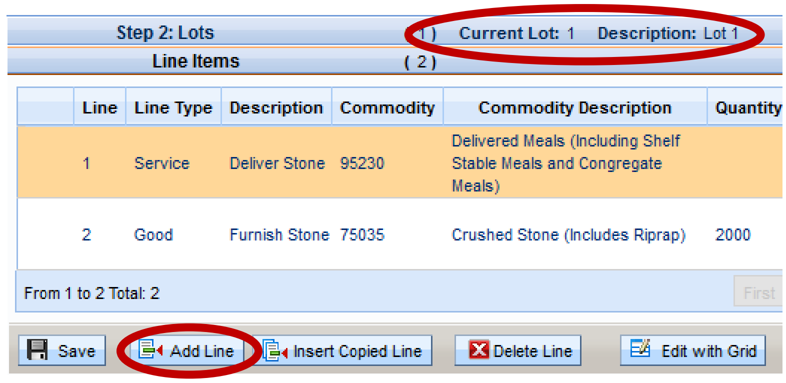


ADD LINE ITEMS

1. Click Line Items bar to enter line item information.
2. *Click the Add Line button to enter basic line information.

   NOTE: Check the description on the Lots bar to make sure you are adding the line to the correct lot.
3. *Select Line Type.

   NOTE: Refer to the beginning of the lots and lines instructions for more information.
4. *Enter Description
5. *Enter Commodity or select from pick list



ADD LINE ITEMS (cont'd)

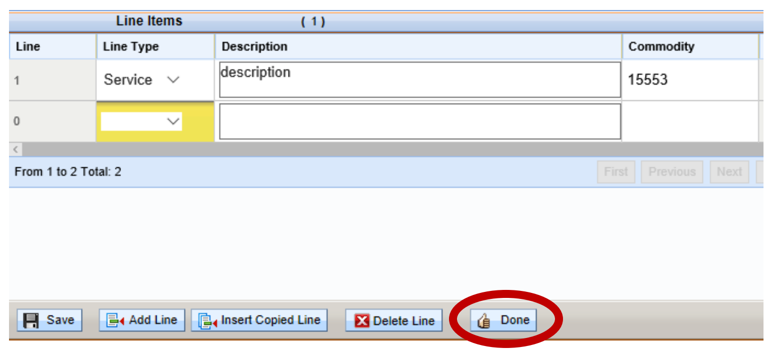
6. *Scroll to the right and enter fields required according to **Line Type**
   a. **Goods**: Quantity and unit
   b. **Services**: Service from and Service to dates
   c. **Discount**: Discount Info Catalog, Effective To and Effective from dates

Repeat steps 1-6 to add additional line items for the lot or load multiple line items at once using the Line Items Template.

Click the **Download Template** button, complete template and save.

Load Line Items button and click **Done** to return to Line Item Summary.

To enter additional information about your line item, click Show Details . To return to the Line Item Summary click **Show Lines** button.



BUILD COMMODITY LIST

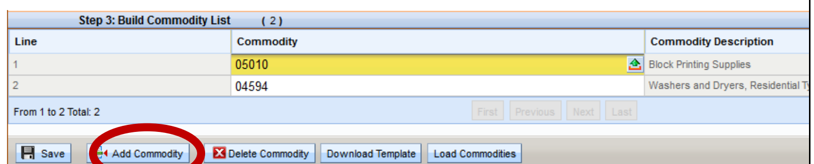
Vendors registered with corresponding codes will receive an email invitation when the solicitation is published, amended, or cancelled. To review the list of vendors, click **Notifications** (top of page).

- For solicitations with line items (reference page 11) commodity codes entered on line items will be listed in this step. You may add additional commodity codes for those solicitations if necessary.
- For solicitations with evaluation criteria and points, enter commodity codes following the steps below.

1. Click **Build Commodity List** bar to view commodity codes.
2. *Click the **Add Commodity** button to add additional commodity codes.
3. Enter **Commodity** code or use the pick-list icon to search and select.

   Add multiple lines via Template using the **Download Template** and **Load Commodities** button.

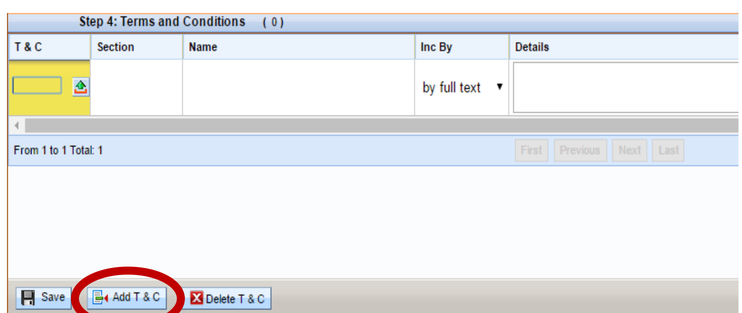
   NOTE: Parent commodity codes cannot be selected.



TERMS & CONDITIONS (optional)

Terms and Conditions loaded from the **Header** will be listed individually.

1. Click **Terms and Conditions** bar to review or add terms and conditions.
2. Click **Add T&C** button to enter additional terms and conditions.
   - **Add Custom T&C** by entering T&C information and leaving the T & C field blank.
   - **Add T&C From Library Individually** by clicking the pick-list icon to search and select.
   - **Update T&C Loaded From Library** by deleting the id in the T&C column and updating as needed.
   - **Delete T&C** by selecting the id in the T&C column and clicking the **Delete T & C** button.



EVALUATION CRITERIA GROUP & CRITERIA FOR GROUP (will be listed on the RFP Style document)

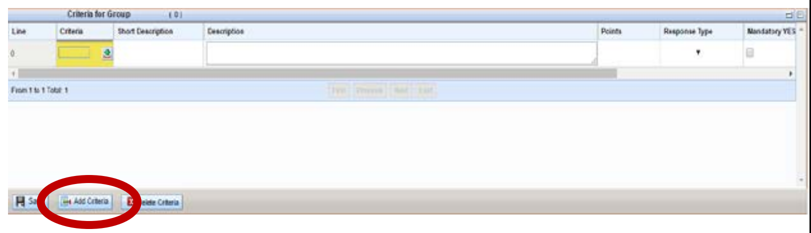
Use this section to identify evaluation criteria and point values.

EVALUATION CRITERIA GROUPS

1. Click **Evaluation Criteria Group** bar
2. Update **Description**
3. If necessary, click **Add Criteria Group** button and update description.

CRITERIA OF GROUPS

1. Click **Criteria of Groups** bar
2. Add from library by clicking **Add Criteria** button and entering details or select using the pick-list icon.
3. Enter points, select the **Response Type** and select if the response will require a **Mandatory Yes Answer**.

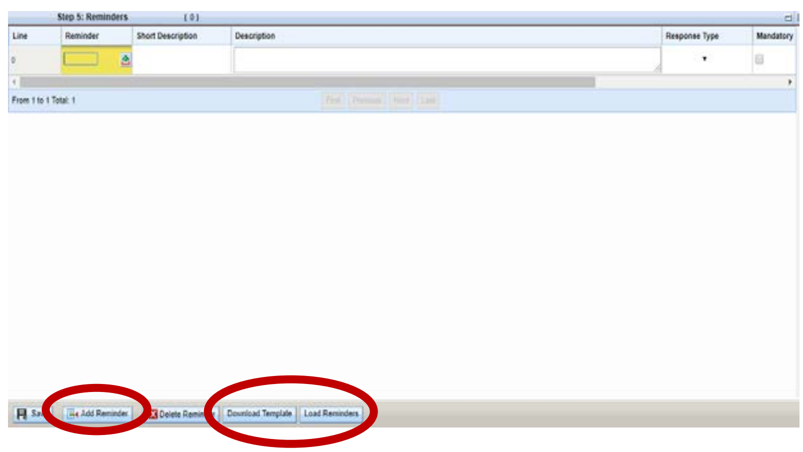


REMINDERS (optional)

The reminder section can be used as a form to gather information from responding businesses or a list of items you want to point out to businesses you are soliciting.

1. Click **Reminders** bar to add reminders.
   - Add individually by clicking **Add Reminder** button and entering details or select using the pick-list icon.
   - Add multiple from Template using the **Download Template** and **Load Reminders** button.

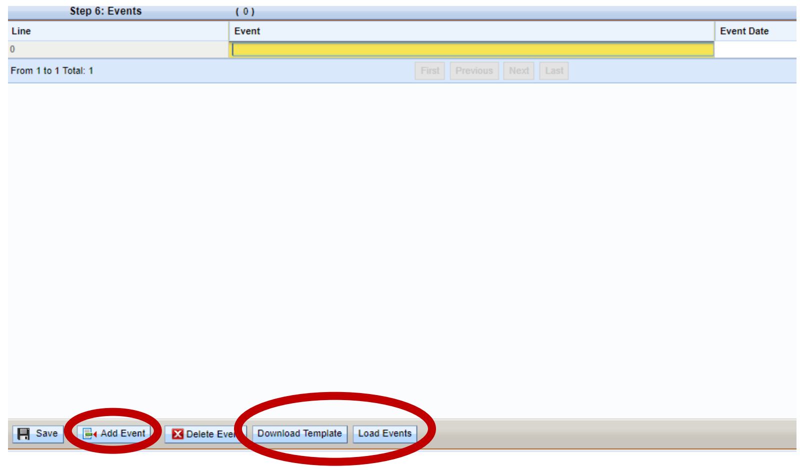
2. Select the **Response Type** and select if the response will require a **Mandatory Yes Answer**.



EVENTS (optional)

The events section is optional and can be used to identify specific dates for your procurement.

1. Click **Events** bar to add events.
   - Add individually by clicking **Add Event** button and entering details or select using the pick-list icon.
   - Add multiple from Template using the **Download Template** and **Load Events** buttons.



VENDOR LIST (optional)

To restrict the businesses that receive notifications of the solicitation, click the **Restrict Responses to Vendors List?** Checkbox on the Header and add vendors to the **Vendor List** step.

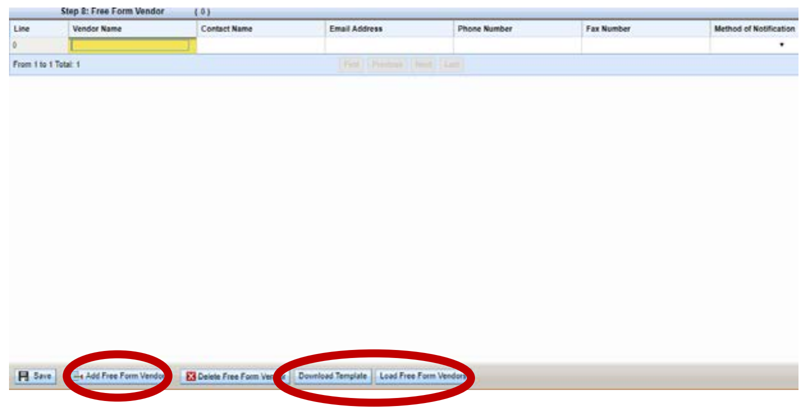
1. Click **Vendor List** bar
2. Click **Add Vendor** button to enter vendors.
3. Select vendor by clicking the pick-list icon to search and select.

   NOTE: Vendor list can only be restricted to eVA registered vendors.

FREE FORM VENDORS (optional)

Buyers can add vendors to the notification list here (for example, add the vendor who has the current contract).

1. Click **Free Form Vendors** bar
   - Add individually by clicking **Add Free Form Vendor** button and entering contact information.
   - Add multiple from Template using the **Download Template** and **Load Free Form Vendors** button.



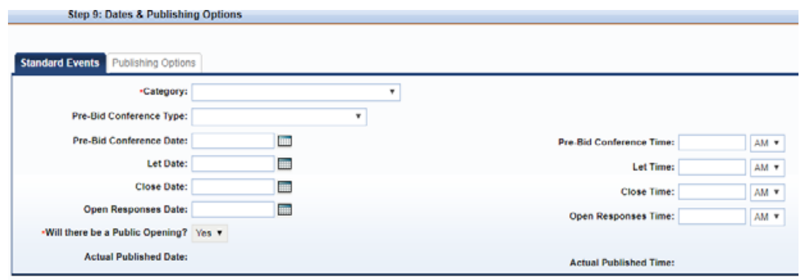
DATES & PUBLISHING OPTIONS

<u>STANDARD EVENTS</u>

1. *Select **Category**
2. Select **Pre-Bid Conference Type**
3. Enter **Pre-Bid Conference Date** & **Time**
4. *Enter **Let Date** & **Time**
5. *Enter **Close Date** & **Time**
6. *Enter **Open Responses Date** & **Time**
7. *If applicable, Select if you will have a **Public Opening**.

<u>PUBLISHING OPTIONS</u>

8. Click **Publishing Options** tab and fill checkboxes for tabs to be populated on the public posting page or other necessary actions.

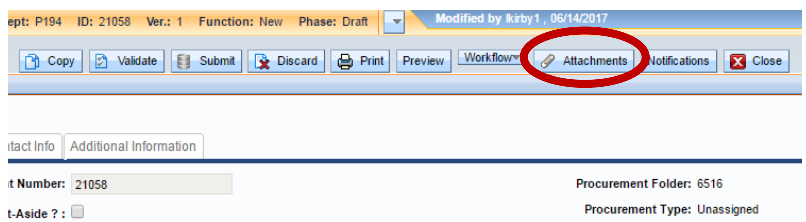


ADD ATTACHMENTS

There are no restrictions on the type of document (PDF, Word, Excel, etc.) that can be attached.

Each document should be less than 60MB and not have special characters in the file name.

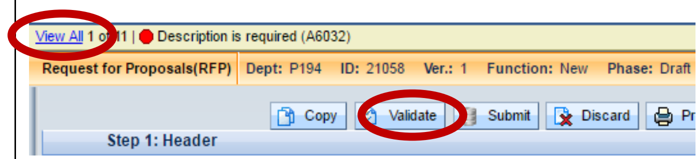
1. Click **Add Attachment** button (top of page).
2. Click **Browse**, locate and select file on your computer, and click **Open**.
3. Enter **Description** of attachment, select **Type** (Standard appears on public posting. Proprietary is not publicly posted.), and click **Attach File**.
4. Click **Return to Solicitation** button.



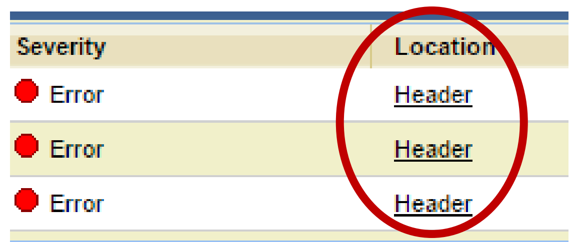
VALIDATE, PREVIEW & SUBMIT

VALIDATE

Click **Validate** button (top of page). If there are any errors, you will see the yellow message bar along the top of the page. You must resolve all with a severity of "Error" before you can proceed.



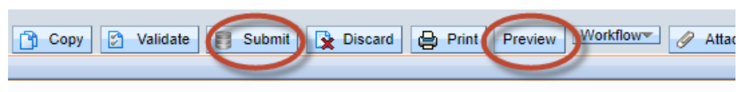
Click **View All** in the yellow bar to open the expand the error messages.



Click the **Location** to be taken to the step where the error is that needs to be resolved.

PREVIEW

Click **Preview** (top of page) to review how solicitation will appear on public posting.



SUBMIT

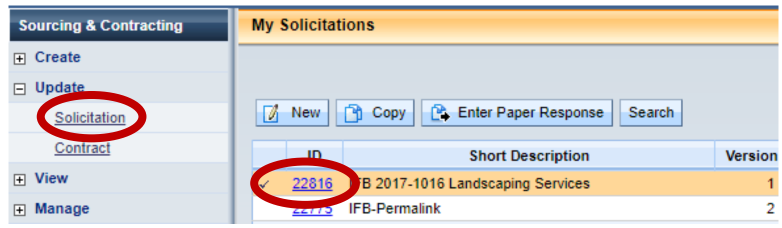
After you have reviewed the preview of the public posting and are satisfied with the list of vendors to be notified, you are ready to publish your ad by clicking the **Submit** button (top of page) to post solicitation on the **Publish Date** and **Time**.

Amend a Solicitation

Solicitations can only be amended while the public posting status is *Open* (prior to closing date and time). Notifications are sent to vendors for amendments.

FIND THE SOLICITATION

1. On left navigation menu click **Update** and then select **Solicitation.**
2. Find the solicitation in the list and click the solicitation **ID** number.

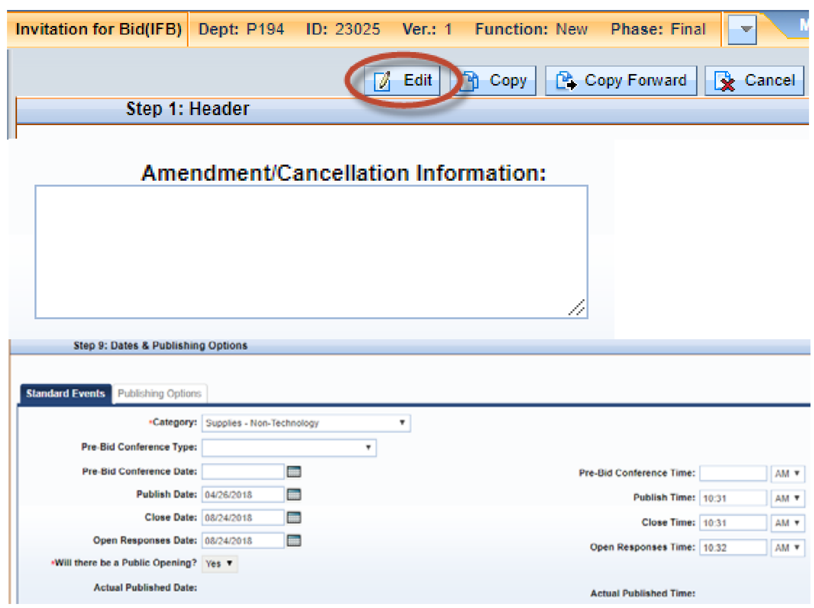


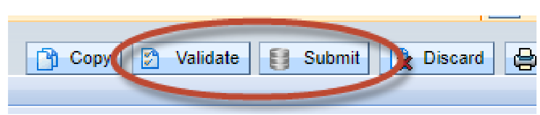
AMEND THE SOLICITATION

1. Click the **Edit** button at the top of the page. A new version of the solicitation will open with the next version number.
2. Enter information in the **Amendment/Cancellation Information** box.
3. Update any additional information.
4. Click the **Dates & Publishing Options** bar.
5. Update the **Publish Date & Time** and make any other needed changes.

NOTE: Sourcing & Contracting will make the new version visible to vendors on the public posting page and send notifications.

6. Click **Validate** and resolve “Errors” and review “Warnings.”
7. Click **Submit** to publish the cancellation or amendment at the published date/time.





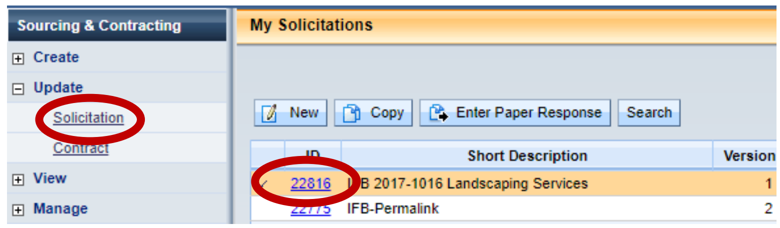
Cancel a Solicitation

Solicitations can only be cancelled while the public posting status is *Open* (prior to closing date and time). Notifications are sent to vendors for cancellations.

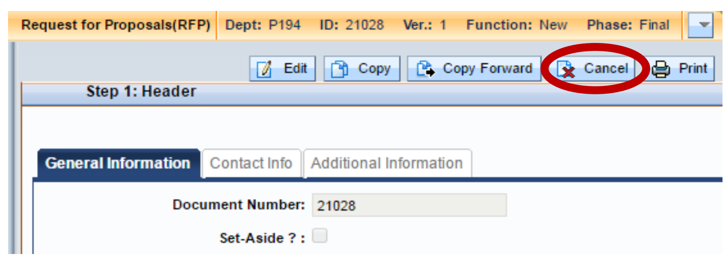
CANCEL THE SOLICITATION

NOTE: To cancel a solicitation that has already closed, the Buyer should post a notice of No Award.

1. On left navigation menu click **Update** and then select Solicitation.

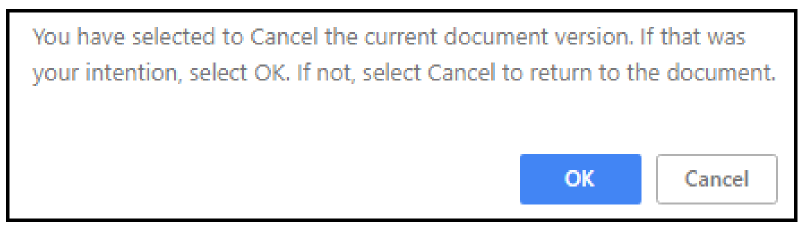


2. Find the solicitation in the list and click the solicitation **ID** number.

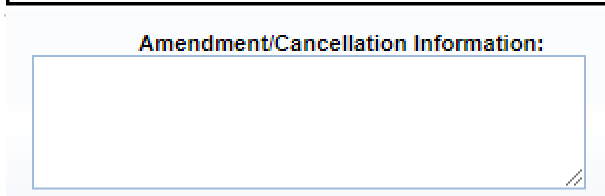


3. Click the **Cancel** button at top of page. A confirmation message will appear, select **OK** to proceed with Cancellation request or **Cancel** to return back to the finalized version of the document.

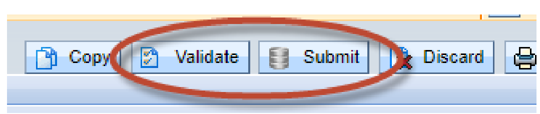
   A new version of the solicitation will open with the next version number. The publishing date will default to today (time remains unchanged from original post).



4. Enter information in the **Amendment/Cancellation Information** box.



5. Click **Validate** and resolve "Errors" and review "Warnings."



6. Click **Submit** to publish the cancellation or amendment at the published date/time.

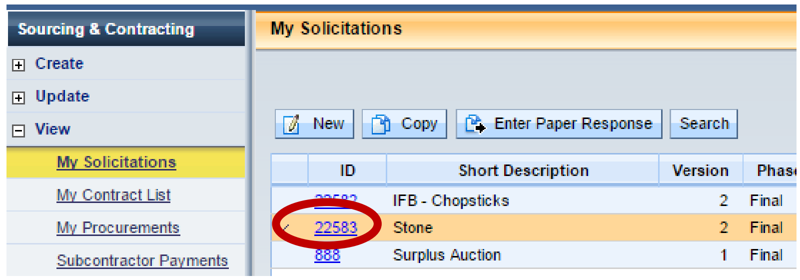
Delete a Draft Solicitation

Solicitation versions can only be deleted when the document phase is Draft. Draft solicitations can be deleted at any time.

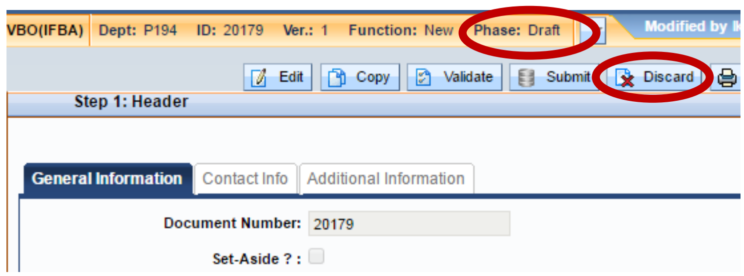
FIND THE SOLICITATION

1. On left navigation menu click **Update** and then select **Solicitation.**

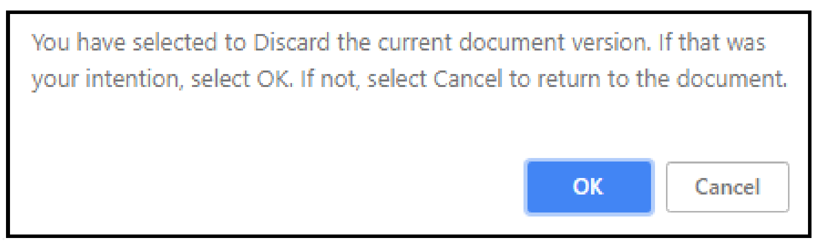
2. Find the solicitation in the list and click the solicitation **ID** number.



3. When the solicitation document opens, verify the Phase is **Draft** and click **Discard** button at top of page.



4. A confirmation message will appear, select **OK** to proceed with the Discard or **Cancel** to return back to the draft version of the document.

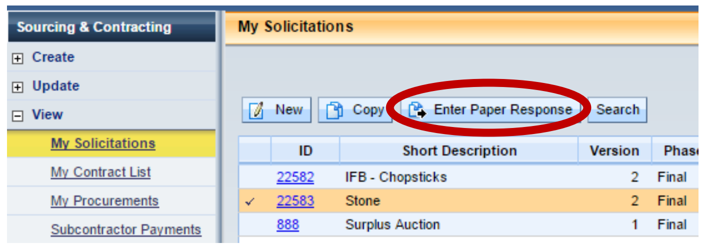


Enter a Paper Solicitation Response

Once the solicitation event has closed, you may enter paper responses in Sourcing & Contracting. Vendors must have an active eVA account and it is recommended buyers have the vendor's eVA VCUST ID when entering paper solicitation responses. To award the solicitation, the awarded vendor's response must be received electronically or the Buyer must enter the paper response.

FIND THE SOLICITATION

1. On left navigation menu click **Update** and then select **Solicitation.**
2. Find the solicitation in the list and click the solicitations **Short Description** to highlight the row yellow.
3. Click **Enter Paper Response** button (top of page).



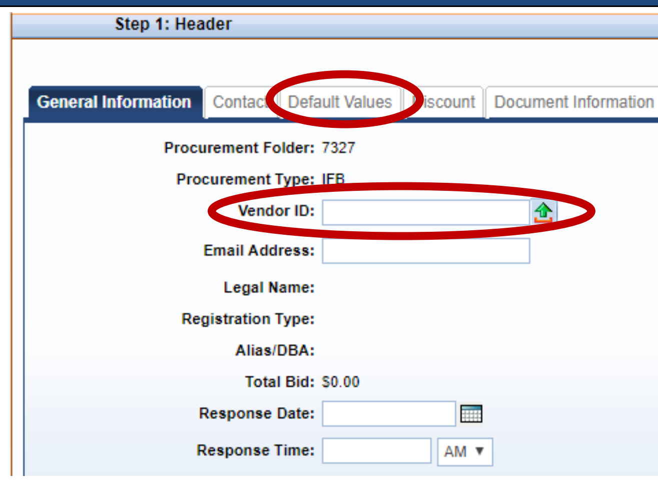
ENTER SOLICITATION RESPONSE

HEADER

General Information Tab:

1. Enter *__eVA Vendor ID__ or select using pick list .
2. If applicable, enter **Total Price.**

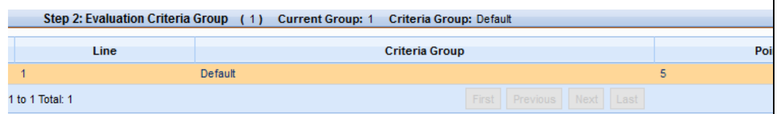
   NOTE: Will be listed on RFP Style document
3. Enter **Response Date** and **Time**
4. Click the **Default Value Tab** and enter **Delivery Days** if solicitation was for goods (items).



EVALUATION CRITERIA GROUP & CRITERIA FOR GROUP (will be listed on RFP Style document)

Evaluation Criteria Group

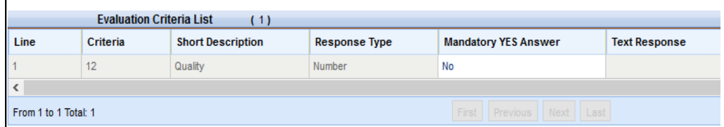
1. Click **Evaluation Criteria Group** bar to view.
2. Click the description of the Criteria Group to enter information. The row will highlight yellow.



Evaluation Criteria List

3. Click **Evaluation Criteria List** bar to view list associated with the Evaluation Criteria Group selected.
4. Update information as provided by vendors.

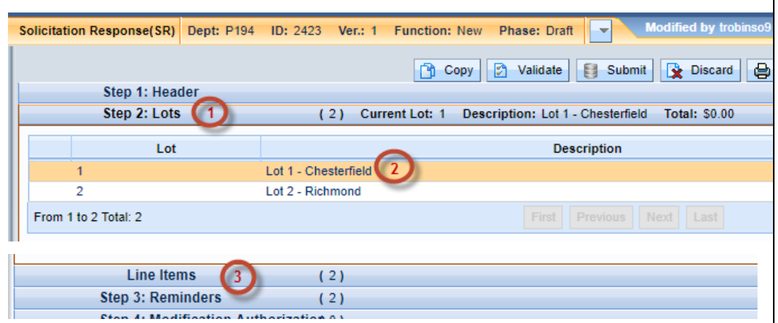
Repeat steps 2-4 to enter all line Information



LOTS AND LINE ITEMS (will be listed on IFB Style document)

LOTS

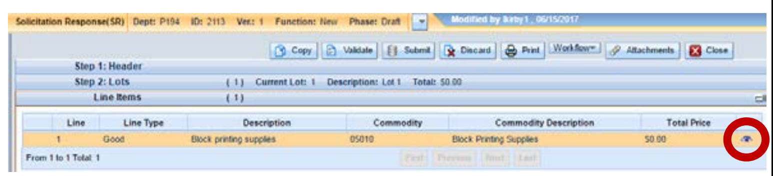
1. Click **Lots** bar to view list of lots.
2. Click the description of the lot. The row will highlight yellow. You will enter the info on **Step 7**.

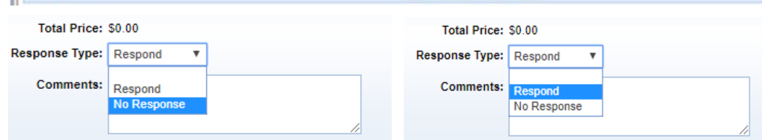


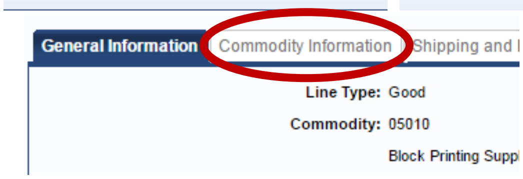
LINES

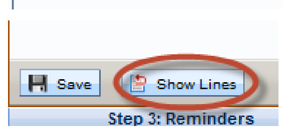
3. Click **Lines** bar to view list of lines associated with the lot selected.
4. Click the **View More** icon next to the line you would like to enter information.
5. Select the appropriate **Response Type** dropdown. If No Response, skip to **Step 8**.
6. Click the **Commodity Information** tab.
7. Enter vendor's response in fields provided:
   a. **Goods**: Unit Price and Delivery Days from Award
   b. **Services**: Bid Contract Amount
   c. **Discount**: Bid Catalog, Effective From and Effective To date, and Discount %.
8. Click the **Show Lines** button to return to list of lines.

Repeat steps 1-8 to enter additional Responses









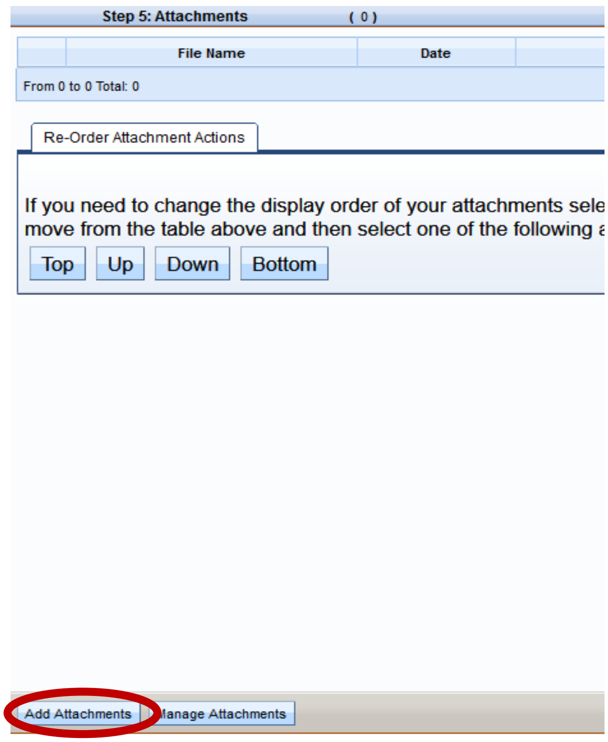
REMINDERS
If (0) appears skip to the next step. Update information as provided by vendors.

MODIFICATION AUTHORIZATION
If (0) appears skip to the next step.

ADD ATTACHMENTS, VALIDATE & SUBMIT

NOTE: Documents attached to the solicitation response will not be displayed on your Contract List.

1. Click **Add Attachment** button on action bar.
2. Click **Browse**, locate and select file on your computer, and click **Open**.
3. Enter **Description** of attachment, select **Type**, and click **Attach File**.
4. Click **Validate** button (top of page) and resolve "Errors" and review "Warnings" in gold bar.
5. Click **Submit** button (top of page).



Update a Solicitation Public Posting Status

(Publish Bid Tab, No Award, Resolicit, Post Notice of Intent to Award)

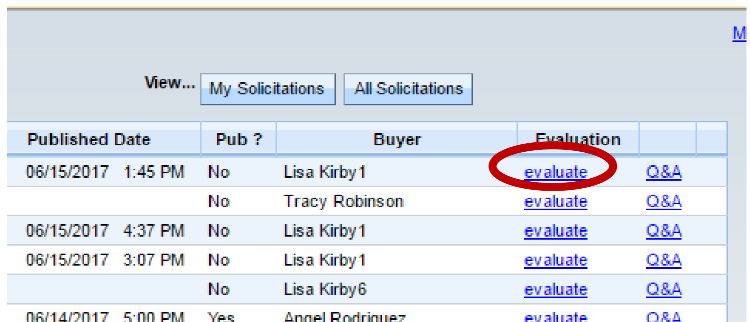
The following steps will guide you through updating your publicly posted solicitation status and generating an award document. After a solicitation closes and as you make decisions about your procurement, record the information in Sourcing & Contracting to update the public posting status. Determine the status you would like displayed on the public posting page and follow the steps.

NOTE: Instructions differ for solicitations with Evaluation Criteria or Line Items. Be sure to refer to the appropriate instructions.

Solicitation with Evaluation Criteria

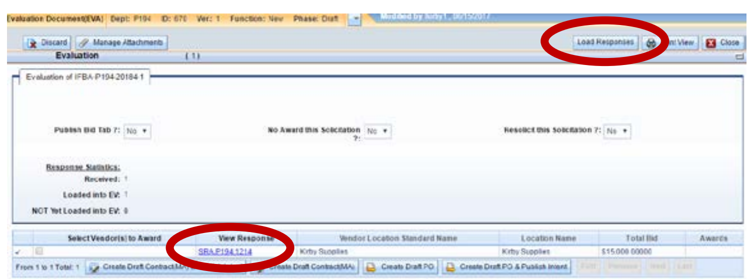
FIND THE SOLICITATION

1. On left navigation menu click **Update** and then select **Solicitation.**
2. Find the solicitation in the list and click the **evaluate** or **number link** in the Evaluation column for the solicitation.



REVIEW SOLICITATION RESPONSES

1. If all responses are not loaded, click **Load Responses** button at top right. If Load Responses button is greyed out, click **Edit** button first.
2. To look at the responses, click the link under **View Response** for each vendor and click **Attachments** to view the submitted attachments.
3. Click **Close** to return to Evaluation document



HOW TO POST NOTICE OF INTENT TO AWARD

1. Fill checkbox(es) to **Select Vendor(s) to Award**
2. Determine appropriate award document:
   a. One-time Purchase Order being issued? Click **Create Draft PO & Publish Intent**. Intent will be instantly published.
   b. Issuing multiple Purchase Orders or does the contract have renewal options? Click **Create Draft Contract (MA) & Publish Intent**. Intent will be instantly published.

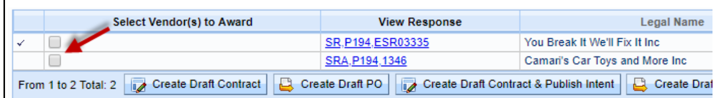
NOTE: Create **Draft Contract(MA) or Draft PO** if you need to attach documents to the NOIA **Step 3**. (If not applicable, continue to **Step 4**).

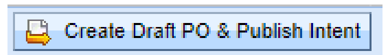
3. To attach documents to Notice of Intent to Award
   a. Click link below **Awards** column.
   b. Click **Edit** & **Attachments** button (top of page).
   c. Click Browse, locate and select file on your computer, and click Open.
   d. Enter Description of attachment, select Type.
   e. Click **Upload** link above Attachment File.
   e. Click **Return to Document** link below table.
4. Click **Close**.

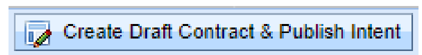
When you are ready to change the status to Awarded:

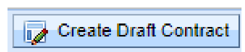
1. Follow steps to Find the Solicitation and click the number link under the Evaluation column.
2. Click the Award ID link below **Awards** column.
3. Click **Edit, c**omplete award document and click **Submit** (Reference Awarding Term Contract via a Master Agreement or Awarding a Spot Buy via A Purchase Order).
4. Repeat for each vendor being awarded.

NOTE: Status will not change to Awarded until one POB/MA has been submitted in Final status.

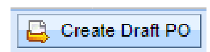


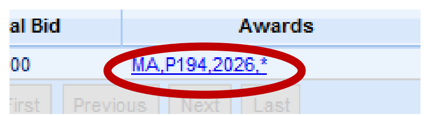


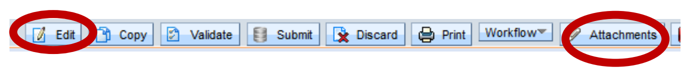


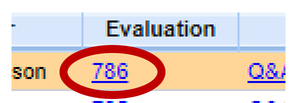


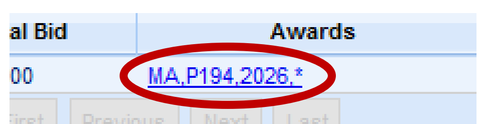
OR

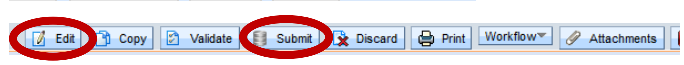












What will happen?

- eVA public posting status will change to **Intent Posted**.
- Intent Info tab added on public posting to include list of vendors selected.
- Notice of Intent attachment types are available on Attachments tab.

HOW TO POST NOTICE OF AWARD (NO INTENT PREVIOUSLY POSTING)

1. Fill checkbox(es) to **Select Vendor(s) to Award**
2. Determine appropriate award document:
3. One-time Purchase Order being issued? Click **Create Draft PO**
4. Issuing multiple Purchase Orders or does the contract have renewal options? Click **Create Draft Contract (MA)**
5. Click link below **Awards** column
6. Click **Edit, c**omplete award document and add any attchments if need**.**

NOTE: To attach documents to Notice of Award

a. Click **Add Awards Attachments** button

b. Click **Browse**, locate and select file on your computer, and click **Open**.

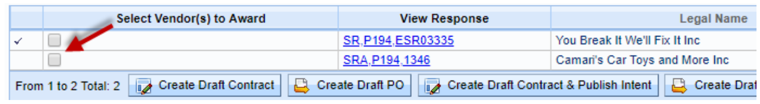
c. Enter Description of attachment, select Type

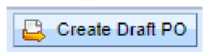
d. Click **Upload** link above Attachment File

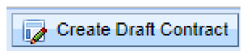
e. Click **Return to Document** link below table.

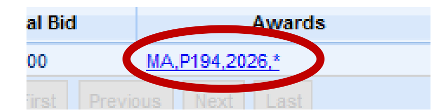
7. Click **Submit** (Reference Awarding Term Contract via a Master Agreement or Awarding a Spot Buy via A Purchase Order).
8. Repeat for each vendor being awarded.

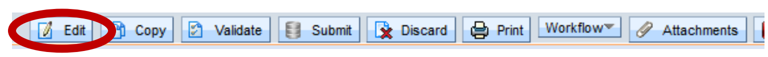
NOTE: Status will not change to Awarded until one POB/MA has been submitted in Final phase.

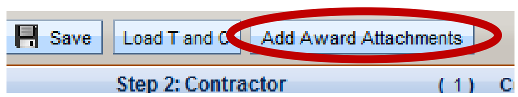












<u>What will happen?</u>

- eVA public posting status will change to **Awarded**.
- Award Info tab added on eVA public posting page to include list of vendors selected on evaluation tab.
- Notice of Award attachment types are available on
- Attachments tab.

HOW TO PUBLISH BID TABULATION, POST NO AWARD, OR RESOLICIT A SOLICITATION	
PUBLISH BID TABULATION (SKIP IF NOT APPLICABLE)	
1. Answer **YES** to **Publish Bid Tab**? 2. Add description and attachments 3. Click **Publish to VBO**	What will happen? - **No email notifications are sent.** - Bid Reading tab added on public posting to include comment and list of vendors responding vendors. - Public Bid attachment types are available on Attachments tab.
POST NO AWARD (SKIP IF NOT APPLICABLE)	
1. Answer **YES** to **No Award this Solicitation**? 2. Add description and attachments Click **Publish to VBO**	What will happen? - **No email notifications are sent.** - eVA public posting solicitation will change to **No Award** - No Award & Resolicit Info tab added on public posting to include No Award description. No Award attachments types are available on Attachments tab.
POST RESOLICIT (SKIP IF NOT APPLICABLE)	
1. Answer **YES** to **Resolicit this Solicitation**? 2. Add description and attachments 3. Click **Publish Resolicit**	What will happen? - **No email notifications are sent.** - eVA public posting solicitation will change to **No Award** - No Award & Resolicit Info tab added on public posting to include Resolicit description. Resolicit attachments types are available on Attachments tab.

Update a Solicitation Public Posting Status

(Publish Bid Tab, No Award, Resolicit, Post Notice of Intent to Award)

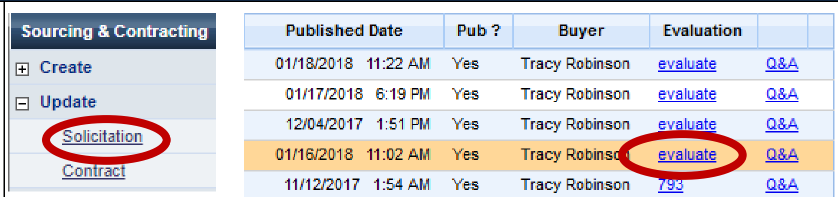
The following steps will guide you through updating your publicly posted solicitation status and generating an award document. After a solicitation closes and as you make decisions about your procurement, record the information in Sourcing & Contracting to update the public posting status. Determine the status you would like displayed on the public posting page and follow the steps.

NOTE: Instructions differ for solicitations with Evaluation Criteria or Line Items. Be sure to refer to the appropriate instructions.

Solicitation with Line Items

FIND THE SOLICITATION

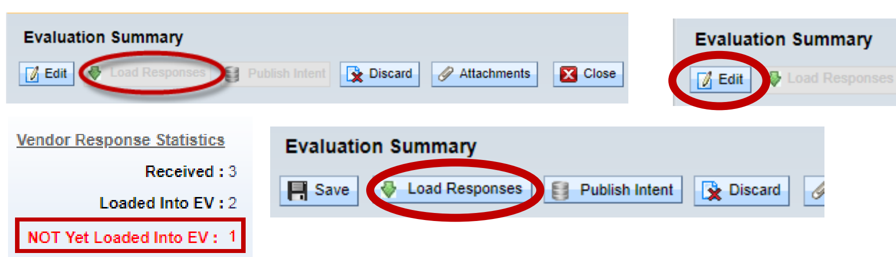
1. On the left-hand navigation menu click **Update** and select **Solicitation.**
2. Locate the solicitation in the list and click the **evaluate** or **number link** in the Evaluation column.



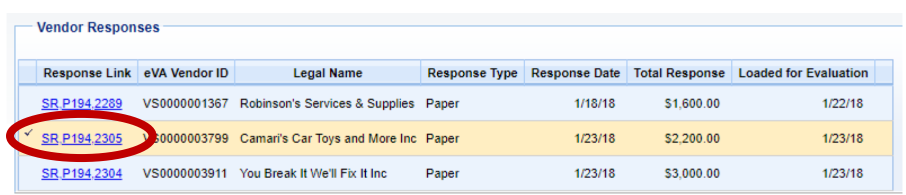
REVIEW SOLICITATION RESPONSES

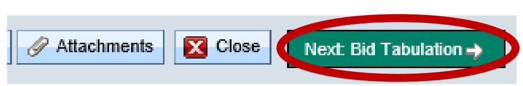
3. If the **Load Responses** button is greyed out, click the **Edit** button.

   Verify that all responses have been loaded and if not, click the **Load Responses** button at top left.
4. To review the responses, click on the appropriate response under the Responses Link column and click on the **Attachments** button to view any attachments.
5. Click on the **Close** button to return to Evaluation document.
6. Click **Next: Bid Tabulation** to continue to the **Bid Tabulation** page.



(example of a response needing to be loaded)





SELECT VENDOR(S) TO AWARD BY (LINE, LOT or TOTAL), NO AWARD or RE-SOLICIT.

See (7a). To Select Vendor(s) To Award by (Total, Line or Lot).

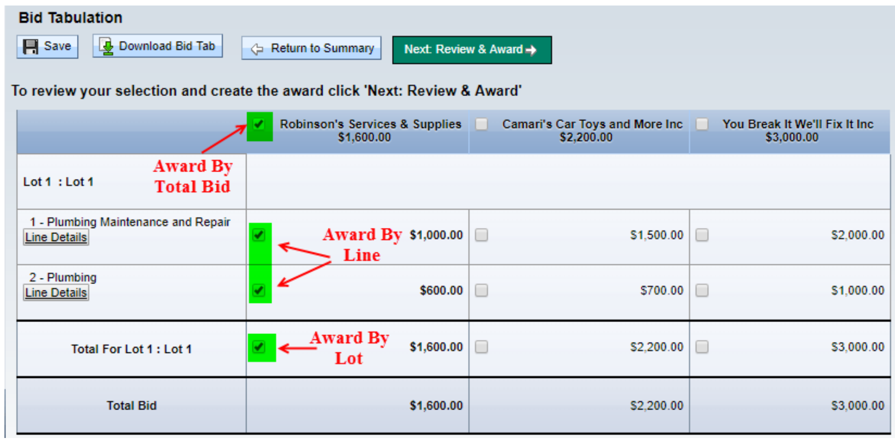
See (7b). To No Award or Resolicit the *entire* Solicitation (*skip if not applicable).*

See (7c). To Select Vendor(s) to Award and No Award and/or Resolicit the Solicitation *per line* (*skip if not applicable*).

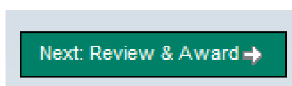
See (PUBLISH BID TABULATION) section below for instructions to Publish Bid Tab (*skip if not applicable).*

7a. Award by Total, Line, Lot.

- To award by **LINE**, check the box next to each line item.
- To award by **LOT**, check the box on the lot line summary.
- To award by **TOTAL**, check the box next to each vendor name (column header).



8. Click **Next: Review & Award** and Continue to **Step 9**.

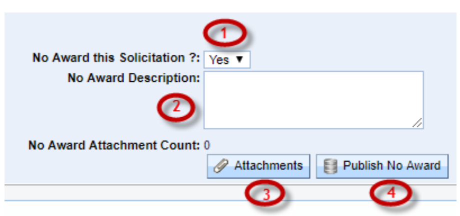


7b. To No Award or Resolicit the *entire* Solicitation:

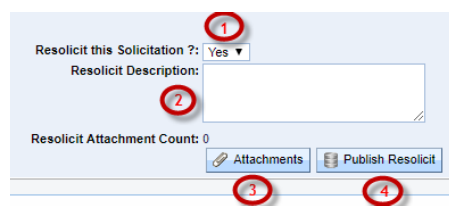
From the Evaluation Summary screen:

1. Select **Yes** from the drop-down box next to the appropriate selection.
2. Add **Description** (optional).
3. Add **Attachment(s)** (optional) and verify **Attachment Count**.
4. Click on the appropriate selection to publish the **No Award** or **Resolicit** document.
5. Click **Close**

No Award



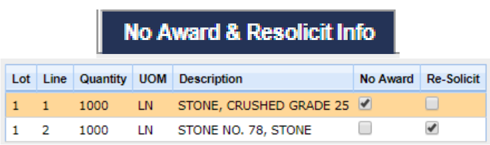
Resolicit



7c. To Select Vendor(s) to Award, No Award and/or Resolicit the Solicitation *per line*:

1. Click the **Show** link to display the **No Award** and **Resolicit** fields.
2. Check the box next to the appropriate **No Award** and **Resolicit** selection.

   Note: You may change your selection by unchecking the No Award or Resolicit boxes and clicking the **Save** button. The public posting is updated immediately (see below).



No Award & Resolicit Info

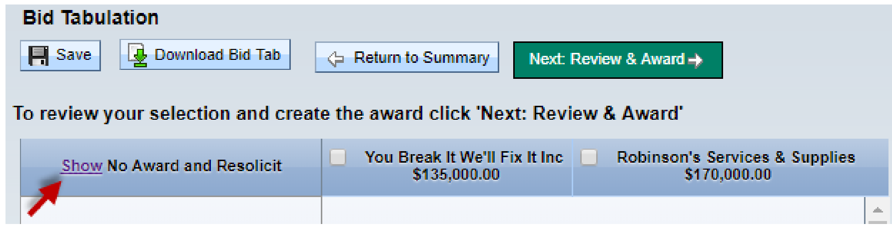
Lot	Line	Quantity	UOM	Description	No Award	Re-Solicit
1	1	1000	LN	STONE, CRUSHED GRADE 25	☑	☐
1	2	1000	LN	STONE NO. 78, STONE	☐	☑

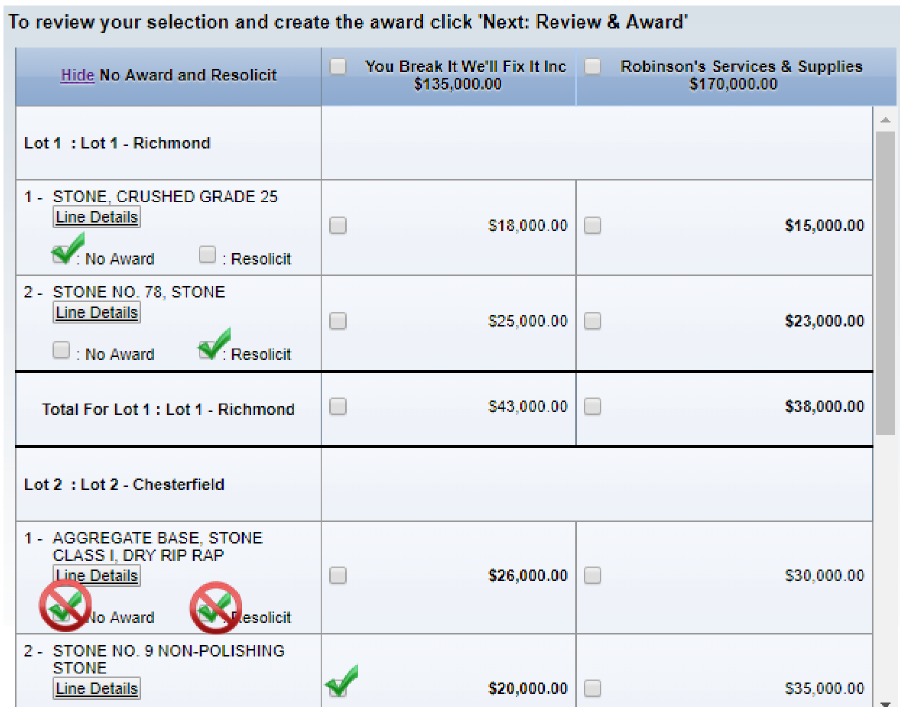
   You cannot select both No Award and Resolicit on the same line.

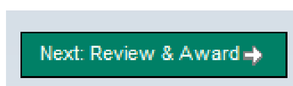
3. If you are making an award to a vendor, continue with award selection(s).
4. Click on **Next: Review & Award**.

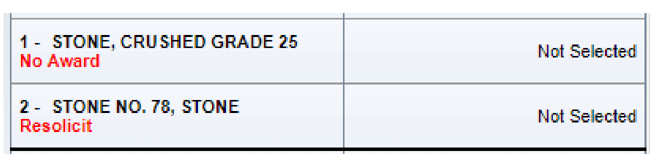
   Note: Lines No Awarded or Resolicited will now be update with the corresponding status.

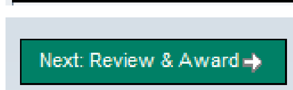
5. Repeat **Step 4.** again.
6. Navigate below to **Step 9.** of the **(DETERMINE AWARD DOCUMENT)** to proceed with the evaluation process.











DETERMINE AWARD DOCUMENT

9. Determine appropriate award document and follow those specific steps below:

a. Click **Create Draft Contract, Create Draft PO, Create Draft Contract & Publish Intent, or Create Draft PO & Publish Intent.**

- Issuing multiple Purchase Orders or does the contract have renewal options? Create a **MA** (see **Award Solicitation via a Master Agreement** Step 2b after you have created the award below in step c.)

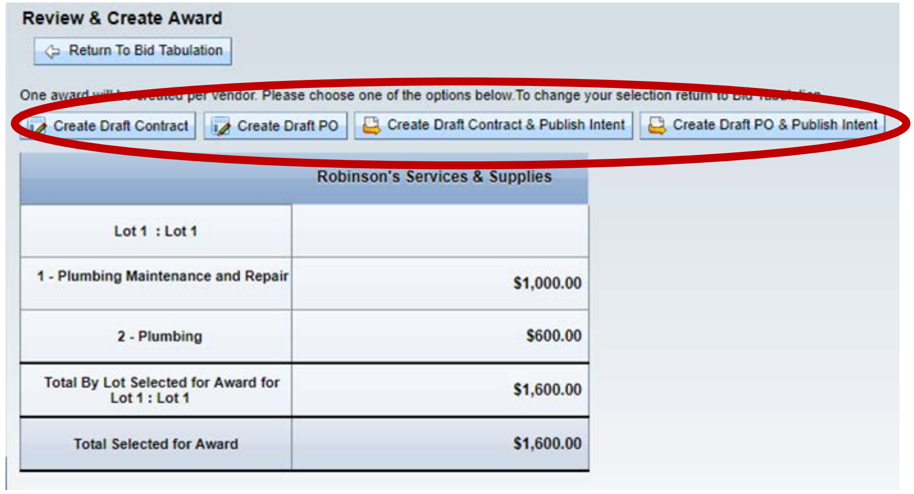
- One-time Purchase Order being issued? Create a **POB** (see **Award Solicitation via a Purchase Order** Step 2b after you have created the award below in step c.)

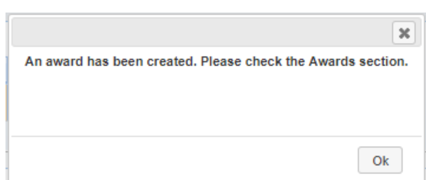
Note: If a Discount line type is being awarded you must use an MA award document.

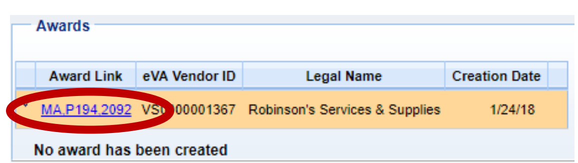
Note: Finalizing the Award document will update the Public Posting to Awarded status.

b. Confirmation message: An award has been created. Please check the Awards section." will appear, click **Ok**.

c. A award will now be listed in the **Award** section.







REVIEW, DOWNLOAD, OR PUBLISH BID TABULATION

Sourcing & Contracting will create a bid tab based off all responses for the solicitation. To review or publish the bid tab from the **Evaluation Summary**, or download the it from the **Next: Review & Award** page follow the steps below:

To Review or Download:

1. Click on the **Edit button** if the tab is greyed out.
2. Click on the **Next: Bid Tabulation** button**.**
3. Review the bid tabulation.
4. Once finished revewing the Bid Tab, click on the **Return to Summary** button to navigate back to the Evaluation Summary screen.

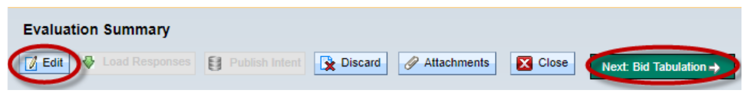
To Publish:

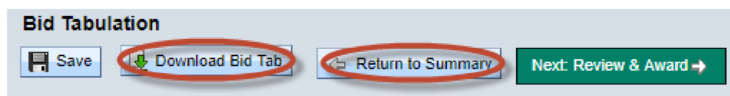
1. From the Evaluation Summary screen, select **Yes** from the drop-down box next to **Publish Bid Tab?**
2. Add **Bid Tab Description** (optional).
3. Add **Bid Tab Attachment** (optional) and verify **Count** (if applicable).
4. Click on the **Publish Bid Tab** button to publish the Bid tabulation**.**

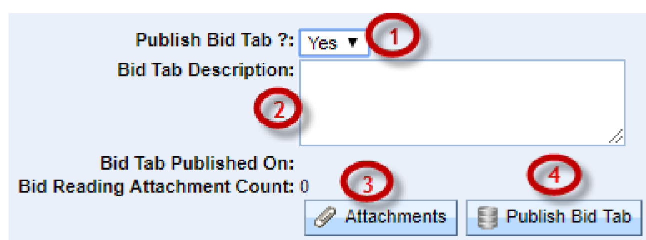
Note: The public posting is updated immediately and the **Bid Tab Published On** date will be popluted.

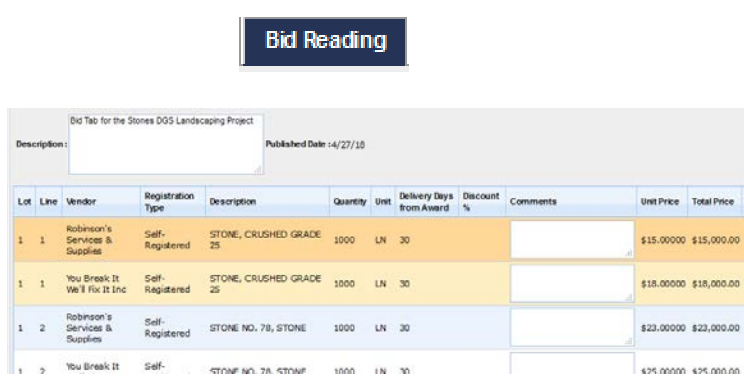
What will happen?

- **No email notifications are sent.**
- Bid Reading tab added on public posting to include comment and list of vendors responding vendors.
- Public Bid attachment types are available on Attachments tab.









Award Solicitation via a Master Agreement (MA)

The following steps will guide you through posting a Notice of Award and finalizing a Master Agreement (MA) to establish a contract record in Sourcing & Contracting. Master Agreements are recommended for term contracts or when you will be issuing multiple purchase orders.

FIND THE DRAFT MASTER AGREEMENT

Follow this step if you have posted a Notice of Intent to Award. Skip to **Complete the Master Agreement** if a Notice of Intent is not being published.

1. On left navigation menu click **Update** and then select **Solicitation.**
2. Find the solicitation in the list and click the **evaluate** or **number** link in the Evaluation column for the solicitation.
   a. Solicitations with Evaluation Criteria: Click the MA link under the Awards column (far right).
   b. Solicitations with Line Items: Click the MA link in the Generated Awards section on the Header.

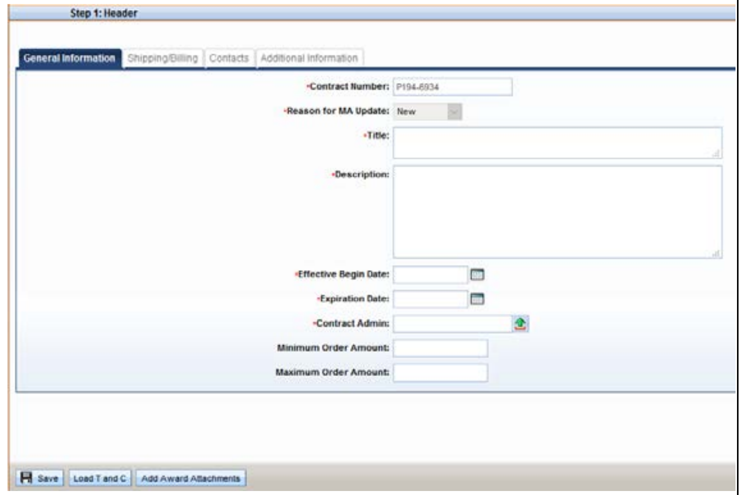
COMPLETE THE MASTER AGREEMENT

1. Click **Edit** button (top of page)
2. Update **Contract Number** (if applicable)

NOTE: Contract number cannot be updated after MA has been submitted and is in Final status.

3. Enter **Title**, **Description**, **Effective Begin Date**, **Expiration Date**, **Contract Admin** and select **Category** and **Contract Type**

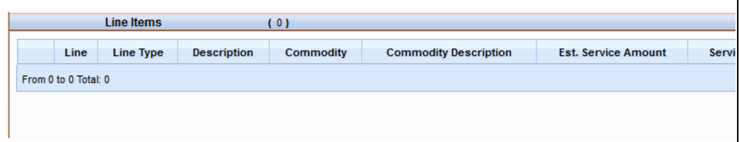
NOTE: **Total Amount** will be populated after items have been added



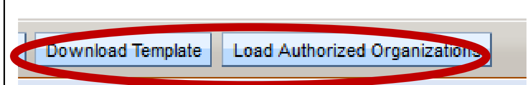
4. Enter **Award Description** and click **Add Award Attachments** to upload documents to share on the public posting page.
5. Review and update **Shipping/Billing** and **Contact** tabs
6. Click **Contractor** and verify Vendor info

NOTE: Separate MA’s are created for each vendor awarded. The only time more than one vendor should be included on a MA is if it’s a multi-party agreement.

7. Click **Line Items to** verify or update
   a. To update, click **Edit with Grid**, update information, and click **Done**
   b. To add, click **Add Commodity** button (grey bar), select **Commodity Code** and enter required fields. (repeat as needed; 1 line required).



8. Click **Authorized Organizations** or **Download Template** to add additional entities that have access to procure from the contract



9. Click **Renewal Options**
   a. Click **Add Renewal Period**
   b. Select **Unit** and enter **Period Length** and **Notification Days.**

ADD ATTACHMENTS, VALIDATE & SUBMIT	
NOTE: Documents attached to the Master Agreement will not be displayed on your Contract List and will only be available for buyers using Sourcing & Contracting. 1. Click **Add Attachment** button on action bar. 2. Click **Browse**, locate and select file on your computer, and click **Open**. 3. Enter **Description** of attachment, select **Type**, and click **Attach File**. 4. Click **Validate** button (top of page) and resolve "Errors" and review "Warnings" in gold bar. 5. Click **Submit** button (top of page). NOTE: Status will not change to Awarded until one MA has been submitted in Final status.	What will happen? - **Email notification that Award has been posted is sent to vendors.** - Public posting status will change to **Awarded**. - Award Info tab added on public posting to include list of vendors with MA's in Final phase. - Notice of Award attachment types are available on Attachments tab. - Contract record is available in Contract Management. Best Practice: Complete and submit all MA the same day to prevent vendors from receiving multiple notifications.

Award a Solicitation via a Purchase Order (POB)

The following steps will guide you through awarding a solicitation by finalizing a Purchase Order (POB) award. Awarding by a POB is recommended for solicitations where a single purchase order will be issued. Once the POB is in Final phase, the public posting status will be updated to Awarded and a draft Purchase Requisition will be created in eMall for the individual identified as the Preparer to submit and send to the vendor. The POB will not be included in your Contract List nor will you receive notifications prior to the end of the contract.

FIND THE DRAFT PURCHASE ORDER IN SOURCING & CONTRACTING

Follow this step if you have posted a Notice of Intent to Award. Skip to **Complete the Purchase Order** if you did not publish a Notice of Intent to Award.

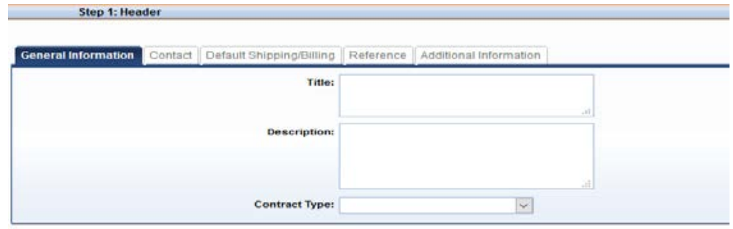
1. On left navigation menu click **Update** and then select **Solicitation.**
2. Find the solicitation in the list and click the **evaluate** or **number** link in the Evaluation column for the solicitation.
   a. Solicitations with Evaluation Criteria: Click the POB link under the Awards column (far right).
   b. Solicitations with Line Items: Click the POB link in the Generated Awards section on the Header.

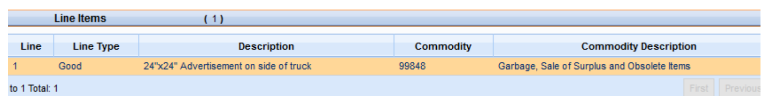
COMPLETE THE PURCHASE ORDER

1. Click **Edit** button (top of page)
2. Enter **Title**, **Description**, **Award Description** and select **Category**
3. Click **Add Award Attachments** to upload documents to share on the public posting page.
4. Review and update **Ship To/Bill To** and **Contact** tabs
5. Click **Vendor** section and verify Vendor

NOTE: Separate POB's are created for each vendor awarded.

6. Click **Line Items**
    a. Click **Add Commodity** button (grey bar)
    b. Enter **Line Item Description**; select **Commodity Code**; and update **Quantity**, **Unit**, and **Unit Price** as needed. (repeat as needed; 1 line required)





ADD ATTACHMENTS, POST AWARD, & GENERATE eMALL PR

NOTE: Documents attached to the POB will be sent to eMall Purchase Requisition.

1. Click **Add Attachment** button on action bar.
2. Click **Browse**, locate and select file on your computer, and click **Open**.
3. Enter **Description** of attachment, select **Type**, and click **Attach File**.
4. Click **Validate** button (top of page) and resolve "Errors" and review "Warnings" in gold bar.
5. Click **Submit** button (top of page).

NOTE: Status will not change to Awarded until one POB has been submitted in Final status.

What will happen?

- **Email notification of Award is sent to vendors.**
- Public posting status will change to **Awarded**.
- Award Info tab added on public posting to include list of vendors with POB's in Final phase.
- Notice of Award attachment types are available on Attachments tab.

Best Practice: Complete and submit all POB the same day to prevent vendors from receiving multiple notifications.

Post a Sole Source or Emergency Award

The following steps will guide you through posting a Sole Source and Emergency Award to the public posting page that will simultaneously: (1) create a Master Agreement record, (2) create an electronic procurement folder, and (3) feed eVA Contract Management.

General Requirements:

- User has submitted DPS Sole Source Approval eForm prior to creating post (as applicable).
- Vendor must be eVA registered and active.
- Best Practice: If contract is a Purchase Order, issue Purchase Order before posting award.

1	Access Sourcing & Contracting	i. Login with your eVA account user name and password ii. Click ***Sourcing & Contracting*** (left navigation menu)
2	Create a contract record (Master Agreement)	i. Click **Create** (left navigation) and select **Sole Source Award** or **Emergency Award.** ***Department** field is defaulted to the user's entity code. If not already defaulted, select the applicable Department Code. ii. **Unit:** Select (if applicable). iii. Click **Create** Best Practice: Use your eVA PO or agency contract number. Document ID is the number associated with the public posting.
3	Complete Emergency / Sole Source document	**Step 1 – Header** i. Enter **Title, Description**, **Effective Begin Date**, **Expiration Date**, **Contract Admin**, **Category**, **Award Date**, **Award Description**, and **Work Location**. Best Practices **Contract Number:** Use your Auto Number ID # (eVA PO or agency contract number.) **Award Description:** Key in vendor name in Award Description in lieu of creating and attaching Notice of Award document (optional). **T & C Template:** Select a template group of **T&C's** using the pick list and click **Load T and C** button. **Step 2 – Contractor** i. Click **Add Contractor** button located above **SWaM Information** bar. **SWaM Information** will be populate once document has been validated. Click to search and **Select** an active vendor or begin typing the vendor's name in the **eVA Vendor ID** box to utilize type ahead feature. ii. Click **Line Items** and the **Add Line Item** button located on the far left above **Sub Contractor** bar. Select **Commodity Code**; and add **Quantity**, **Unit**, and **Unit Price** as needed and click **Done**. (Repeat adding line items as needed; *1 line items is required).

	Complete Emergency / Sole Source document (cont'd)	**Step 3 – Sub Contractor *(optional)*** Click **Add Sub Contractor** button located above **Step 4** bar. Click to search and **Select** an active vendor. **Step 4 – Terms and Conditions *(optional)*** i. Click **Terms and Conditions** button located above **Step 5** bar. ii. Click **Add T & C** button to enter additional terms and conditions. • **ADD CUSTOM T&C** by entering T&C information and leaving the T & C field blank. • **ADD T&C from Library Individually** by clicking the pick-list icon to search and select. • **UPDATE T&C Loaded from Library** by deleting the ID in the T&C column and updating as needed. **Step 5 – Authorized Organizations** Defaults to user's entity code. Add or remove additional entities authorized to purchase off the contract. Note – When adding additional entities, always a new line and never type over previous entered information. If you need to add a list of entities, you may do so via **Authorized Organizations** template. i. Click **Download Template**. ii. List additional entities and save file. iii. Click **Load Authorized Organizations**. **iv.** Click **Browse**, locate and select file on your computer, and click **Open**. **v.** Click **Load Your File**. **Step 6 – Renewal Options** i. Click **Renewal Options** button located on **Step 6** bar**.** ii. Click **Add Renewal Period** button. Enter **Renewal Period Unit**, **Renewal Period Length** and **Notification Days (Prior to Expiration).**

4	Attachments	Note – **Adding Attachments *(optional)*** i. Click on the section (**Step#**) for where you would like to add your attachment. ii. Click **Attachments** link located at top of screen. iii. Click **Add Attachment** and **Browse**, locate and select file on your computer. iv. Enter **Description**, select **Attachment Type,** click **Upload**, click **Return to Document**. **Attachment Type:** Standard, SCC Number, Proprietary, Pricing, Notice of Intent, Notice of Award, No Award, and W9 are shown on public posting page.
5	Validate	i. Click Validate button (top of page) and resolve any errors that may appear in gold bar at top of page.
6	Submit	i. Click Submit button. *Sole Source or Emergency Award will immediately post to the public posting page in Awarded Status. *Follow Contract Management Guide to add and share to your entities custom contract list.

Post, Amend or Cancel a Future Procurement (FPR)

The following steps will guide you through the process of creating a Future Procurement post on the public posting page.

TIP! Clicking step headers to move between sections will automatically save your record.

1	Open Sourcing & Contracting	i. Login with your eVA account **User Name** and **Password** ii. Click ***Sourcing & Contracting*** (left navigation menu).
2	Create a Future Procurement post	i. Click **Create** (left navigation) and select **Future Procurement**. ***Department** field is defaulted to user's entity code. ii. Click **Create**.
3	Complete a Future Procurement post	**<u>STEP 1: GENERAL INFORMATION</u>** **Document Number** is the public posting number. It is auto-populated and the **Procurement Folder** is auto assigned when document is created. i. ***Short Description:** Enter title of future procurement. (60 characters). ii. ***Description:** Enter a brief summary of future procurement. (1500 characters). iii. **Estimated Price Range:** Select the estimated price of your future procurement from the drop down. iv. **Estimated Issue Date:** Enter the anticipated posting date of the solicitation. v. **Current Contract Reference Info:** Enter any current contract reference information, if there is a contract currently in place. vi. **Current Contract Expiration Date:** Enter the current contract expiration date, if there is a contract currently in place. vii. **Procurement Type:** Select the anticipated procurement method from the drop down. **<u>STEP 2: BUILD COMMODITY LIST</u>** (repeat as necessary) i. Click ***Add Commodity** (located above Step 3 bar). ii. Enter **Commodity** code or use the pick-list icon to search and select. If you have multiple Commodity Codes, you can add them by clicking Download Template and then the Load Commodities button. NOTE: Email notifications will not be sent out to the vendors. Vendors with matching commodity codes are notified in the eVA 4Business App.

		STEP 3: PUBLISHING INFORMATION i. *__Publish Date__ and *__Publish Time:__ Enter when the procurement should be posted to the public posting page. i. *__Expiration Date__ and *__Expiration Time:__ Enter when the procurement should be removed from public posting page. ii. Select the *__Category__ from the drop down. NOTE: **Published Date** and **Publish Time** (will populate once the selected **Publish Date** and **Publish Time** has been reached).
4	Validate & Submit Future Procurement post	i. Click **Validate** button (top of page) and resolve any errors that appear in gold bar at top of page. ii. Click **Submit** button (top of page). Once the posting has reached the **Publish Date** and **Time**, it will be publicly posted. NOTE: The posting will be removed on the **Expiration Date** and **Time**.
Amending a Future Procurement (*FPR)*		
1	Locate the Future Procurement post	i. Click **Update** (left navigation) and select **Solicitation**. ii. Find the Future Procurement in the list and click the Future Procurement **ID** number. NOTE: Document Phase must be in Final status. If a pre-existing draft exists, the draft in the procurement folder must be modified or discarded.
2	Amend a Future Procurement post	i. Click **Edit**. ii. Update necessary information. iii. On **Step 3: Publishing Information**, update the **Publish Date** and **Time**. iv. Click **Submit** to submit Amended posting.
Canceling a Future Procurement (*FPR*)		
1	Locate the Future Procurement post	i. Click **Update** (left navigation) and select **Solicitation**. ii. Find the Future Procurement in the list and click the Future Procurement **ID** number. NOTE: Document Phase must be in Final status. If a pre-existing draft exists, the draft in the procurement folder must be modified or discarded.

2	Cancel a Future Procurement post	i. Click the **Cancel** button (top of page) and click O**k.** *Display should now reflect: **Function:** Cancellation and **Phase:** Draft ii. Click **Validate** to check for any errors. iii. Click **Submit**. *Display should now reflect: **Function:** Cancellation and **Phase:** Final NOTE: Future Procurement Posting will immediately be removed from the public posting page and you will not be able to copy forward to a solicitation.
Creating a Solicitation from a Future Procurement (FPR)		
1	Locate the Future Procurement	i. Click **Update** (left navigation) and select **Solicitation**. ii. Find the Future Procurement in the list and click the Future Procurement **ID** number. NOTE: Document Phase must be in Final status. If a pre-existing draft exists, the draft in the procurement folder must be modified or discarded.
2	Copy Forward to the Solicitation document	i. Click the **Copy Forward** button (top of page). ii. Enter **Doc. Department Code:** (i.e P194) iii. Enter **Unit Code:** (if applicable) iv. Click on the **Target Doc Type** to highlight that row. v. Click the **OK** button. You will now be navigated to the Version 1 Draft of the solicitation document. NOTE: For instructions on how to Post a Solicitation **(see pg. 11)**.

Post, Amend or Cancel a Government to Government Services (G2G)

The following steps will guide you through the process of creating a Government to Government Services post on the public posting page.

TIP! Clicking step headers to move between sections will automatically save your record.

1	Open Sourcing & Contracting	iii. Login with your eVA account **User Name** and **Password** iv. Click ***Sourcing & Contracting*** (left navigation menu).
2	Create a Gov 2 Gov Services post	7. Click **Create** (left navigation) and select **Gov 2 Gov Services**. ***Department** field is defaulted to user's entity code. 8. Click **Create**.
3	Complete a Gov 2 Gov Services post Complete a Gov 2	**STEP 1: GENERAL INFORMATION** **Document Number** is the public posting number and is auto-populated and the **Procurement Folder** is auto assigned when document is created. viii. Enter **Tracking/PO #** if know or applicable, (will default to Document ID if left blank*)*. ix. Enter title of service in ***Short Description** (60 characters). x. Enter a brief summary in the ***Description** field (1500 characters). xi. Select the organization that is providing the services from the ***Procured From Department/Agency** from the drop down. xii. Enter total amount/cost in the ***Price** field. xiii. Enter date services were provided/started in the ***Services Provided On/Start Date** field. **STEP 2: BUILD COMMODITY LIST** (repeat as necessary) iii. Click ***Add Commodity** (located above Step 3 bar). iv. Enter **Commodity** code or use the pick-list icon to search and select. If you have multiple Commodity Codes, you can add them by clicking Download Template and then the Load Commodities button. NOTE: Email notifications will not be sent out to the vendors. Vendors with matching commodity codes are notified in the eVA 4Business App. **STEP 3: PUBLISHING INFORMATION** iii. Enter ***Publish Date** and ***Publish Time**.

	Gov Services post (cont'd)	iv. v.	Enter when the post should be removed from public posting page in the ***Expiration Date** and ***Expiration Time** fields. Select the ***Category** from the drop down. NOTE: **Published Date** and **Publish Time** (will populate once selected **Publish Date** and **Publish Time** has been reached).
4	Validate & Submit Gov 2 Gov Services post	iii. iv.	Click **Validate** button (top of page) and resolve any errors that appear in gold bar at top of page. Click **Submit** button (top of page). Once the posting has reached the **Publish Date** and **Publish Time**, it will be publicly posted. NOTE: The posting will be removed on the **Expiration Date** and **Time**.
Amending a Gov 2 Gov Service (*G2G*) Posting			
1	Locate a Gov 2 Gov post	iii. iv.	Click **Update** (left navigation) and select **Solicitation**. Find the Gov2Gov Service in the list and click the Gov2Gov Service **ID** number. NOTE: Document Phase must be in Final status. If a pre-existing draft exists, the draft in the procurement folder must be modified or discarded.
2	Amend Gov 2 Gov post	v. vi. vii. viii.	Click **Edit**. Update necessary information. **Step 3: Publishing Information**, update the ***Publish Date** and ***Publish Time**. Click **Submit** to submit Amended posting.
Canceling a Gov 2 Gov Service (*G2G*) Posting			
1	Locate a Gov 2 Gov post	iii. iv.	Click **Update** (left navigation) and select **Solicitation**. Find the Future Procurement in the list and click the Future Procurement **ID** number. NOTE: Document Phase must be in Final status. If a pre-existing draft exists, the draft in the procurement folder must be modified or discarded.
2	Cancel Gov 2 Gov post	i. ii. iii.	Click **Cancel** button (top of page) and click O**k** to confirm. ***Display should now reflect: **Function**: Cancellation and **Phase:** Draft Click **Validate** to check for any errors. Click **Submit.** *Display should now reflect: **Function:** Cancellation and **Phase:** Final NOTE: Future Procurement Posting will immediately be removed from the public posting page.

Create a Standalone Contract Record (MA) without a Solicitation

The following steps will guide you through creating a standalone Master Agreement (MA). Standalone MA's are created when the contract is not solicited in the Sourcing & Contracting module.

General Requirements
- Vendor must be eVA registered and active.
- Contract Administrator must have an eVA ID.

1	Access Sourcing & Contracting	i. Login with your eVA account user name and password ii. Select '**Go To**' drop down and select ***Sourcing & Contracting*** (left navigation menu)
2	Create a contract record (Master Agreement)	i. Click **Create** (left navigation) and select **Contract.** ii. Click **Create Contract** (above Contract Listing table). iii. **Master Agreement (MA) is** already the defaulted Document Code. iv. Select your entity from the **Department** drop down. v. Select a **Unit** if necessary. vi. Click **Create Document.**
3	Complete a contract record (Master Agreement)	**Step 1 – Header** ***Contract Number** will default to entity code-procurement folder. ***Contract Number** can update on version 1 only. i. Enter **Title, Description, Effective Begin Date, Expiration Date, Contract Admin, Procurement Type, Category, and Contract Type.** ii. Select a **T&C Template** if loading terms from a template and click **Load T and C**. Update Shipping/Billing information and Contract Officer, if necessary, on Contacts tab. **Step 2 – Contractor** Click **Add Contractor** button located above SWaM Information tab. Click to search and **Select** an active vendor. **Step 3 – Sub Contractor *(optional)*** Click **Add Sub Contractor** button located above **Step 4** bar. Click to search and **Select** an active vendor. **Step 4 – Terms and Conditions** *(optional)* i. Click **Terms and Conditions** button located above **Step 5** bar. ii. Click **Add T & C** button to enter additional terms and conditions.

3	Complete a contract record (MA) (cont'd)	• **ADD CUSTOM T&C** by entering T&C information and leaving the T & C field blank. • **ADD T&C from Library Individually** by clicking the pick-list icon to search and select. • **UPDATE T&C Loaded from Library** by deleting the ID in the T&C column and updating as needed. **Step 5 – Authorized Organizations** Defaults to user's entity code. Add or remove additional entities authorized to purchase off the contract. Note – When adding additional entities, always a new line and never type over previous entered information. If you need to add a list of entities, you may do so via **Authorized Organizations** template. vi. Click **Download Template**. vii. List additional entities and save file. viii. Click **Load Authorized Organizations**. Click **Choose File**, locate and select file on your computer, and click **Open**. Click **Load Your File**. **Step 6 – Renewal Options** i. Click **Renewal Options** button located on **Step 6** bar**.** ii. Click **Add Renewal Period** button. iii. Enter **Renewal Period Unit**, **Renewal Period Length** and **Notification Days (Prior to Expiration).**
4	Attachments	Note – **Adding Attachments *(optional)*** Click on the section (**Step#**) for where you would like to add your attachment. Click **Attachments** link located at top of screen. Click **Add Attachment**, **Choose File**, locate and select the file on your computer. Enter **Description**, select **Attachment Type,** click **Upload**, and click **Return to Document**. Attachment Types: Standard, SCC Number, Proprietary, Pricing, Notice of Intent, Notice of Award, No Award, and W9 are shown on public posting page.
5	Validate	Click **Validate** button (top of page) and resolve any errors that appear in yellow bar at top of page.
6	Submit	Click **Submit**. *Follow the Contract Management Guide to add and share to your entities custom contract list.

Modify or Correct a Contract Record (MA)

1	Access Sourcing & Contracting	i. Login with your eVA user name and password. ii. Select '**Go To**' drop down and select ***Sourcing & Contracting.***
2	Find the Contract	i. Click **Update** (left navigation) and select **Contract.** ii. Find the contract and click the **Proc Folder** number. TIP! Can't find the contract you are looking for? Use the search features or change to View All Contracts using the buttons at the top. iii. Click the link for the latest version of the MA (under the Award section of the Procurement Folder). TIP! The number following the last comma in the MA link identifies the version. The final version is identified by an "F" between the MA link and the vendor name and is also the first MA under Award.
3	Update the MA	i. Click **Edit** button (above Step 1). ii. Select **Reason for MA Update** from drop down. iii. Update additional fields as needed.
4	Check for Errors & Submit	i. Click **Validate** and resolve any errors displayed in yellow across the top. ii. Click **Submit.**

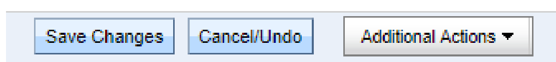
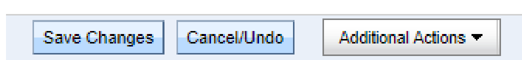
Renew a Contract Record (MA)

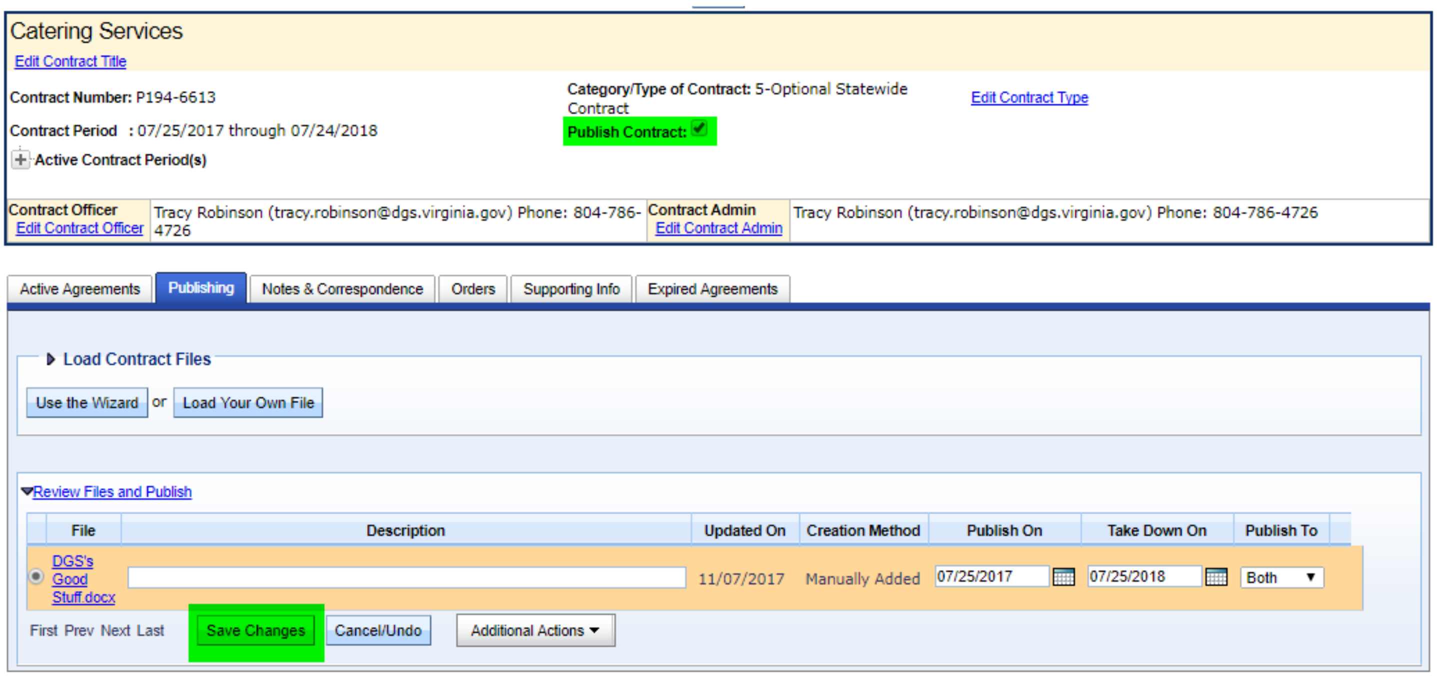
1	Access Sourcing & Contracting	i. Login with your eVA user name and password. ii. Select '**Go To**' drop down and select ***Sourcing & Contracting*** (left navigation menu)
2	Find the Contract	iv. Click **Update** (left navigation) and select **Contract.** v. Find the contract and click the **Proc Folder** number. TIP! Can't find the contract you are looking for? Use the search features or change to View All Contracts using the buttons at the top. vi. Click the link for the latest version of the MA (under the Award section of the Procurement Folder). TIP! The number following the last comma in the MA link identifies the version. The final version is identified by an "F" between the MA link and the vendor name and is also the first MA under Award.
3	Update the MA	iv. Click **Renew** button (above Step 1) v. Verify **Reason for MA Update** is set to **Renewal**. vi. Verify **Effective Begin Date** and **Expiration Date** are updated to the next renewal period. Note! Line Item – If "Service" **Service Start** & **Service End** dates must be updated. TIP! If there are no Renewal Periods left, discard this renewal document, **Edit** the **MA** document, add the renewal period, and submit. Then begin the **Renew** process. vii. Update additional fields as needed.
4	Check for Errors & Submit	iii. Click **Validate** button (top of page) and resolve any errors that appear in yellow bar at top of page. iv. Click **Submit** when all errors are resolved.

Cancel a Contract

1	Access Sourcing & Contracting	i. Login with your eVA user name and password. ii. Select Go To drop down and select ***Sourcing & Contracting*** (left navigation menu).
2	Open the Contract	i. Click **Update** (left navigation) and select **Contract.** ii. Find the contract and click the **Proc Folder** number. TIP! Can't find the contract you are looking for? Use the search features or change to View All Contracts using the buttons at the top. iii. Click the link for the latest version of the MA (under the Award section of the Procurement Folder). TIP! The number following the last comma in the MA link identifies the version. The final version is identified by an "F" between the MA link and the vendor name and is also the first MA under Award.
3	Update the MA	i. Click **Cancel** button (above Step 1) ii. Verify **Reason for MA Update** is set to **Cancellation**. iii. Verify or update contract Expiration Date on Step 1. iv. Verify or update line items Service End Date on Step 4.
4	Check for Errors & Submit	i. Click **Validate** button (top of page) and resolve any errors that appear in yellow bar at top of page. ii. Click **Submit** when all errors are resolved.

Publish Contracts to Your Contract List

1	Access Sourcing & Contracting	i. Login with your eVA account user name and password ii. Click '**Go To**' ***Sourcing & Contracting*** (left navigation menu)
2	Open the corresponding MA in Final Status	i. Click **View** (left navigation) and select **Contract Listing** ii. Find the contract and click the **Contract** number. TIP! Can't find the contract you are looking for? Use the search features or change to View All Contracts using the buttons at the top.
4	Upload Documents	i. Click **Publishing** tab (below contract header) ii. Click **Load Your Own File** iii. Click **Choose File** and locate your file iv. Click **Attach File(s)** v. Click the **Contract Number** for the contract
5	Share Documents on your Contract Report	From the **Publishing** tab, after document(s) have been uploaded... i. Enter **Publish On** date ii. *(Optional)* Enter **Take Down On** date iii. Select which report you would like the document to **Publish To** iv. Click **Save Changes** button 
6	Add/Remove Contract from Contract List	With the Publishing and Review Files and Publish tabs still open… 1. Click the **Publish Contract** checkbox (center of contract header). Reference image #1. 2. Click **Save Changes** button  If you have customized report setup; when the checkbox is filled, a new line with the contract information will appear on your report. To remove the contract from your report uncheck **Publish Contract** checkbox and click **Save Changes** button. ** **Note**: **Publish Contract** information is updated real-time


Catering Services
Edit Contract Title
Contract Number: P194-6613
Category/Type of Contract: 5-Optional Statewide Contract
Edit Contract Type
Contract Period : 07/25/2017 through 07/24/2018
Publish Contract:
Active Contract Period(s)
Contract Officer
Edit Contract Officer
Tracy Robinson (tracy.robinson@dgs.virginia.gov) Phone: 804-786-4726
Contract Admin
Edit Contract Admin
Tracy Robinson (tracy.robinson@dgs.virginia.gov) Phone: 804-786-4726
Active Agreements
Publishing
Notes & Correspondence
Orders
Supporting Info
Expired Agreements
Load Contract Files
Use the Wizard
or
Load Your Own File
Review Files and Publish
File
Description
Updated On
Creation Method
Publish On
Take Down On
Publish To
DGS's Good Stuff.docx
11/07/2017
Manually Added
07/25/2017
07/25/2018
Both
First Prev Next Last
Save Changes
Cancel/Undo
Additional Actions

How a Business Responds Online

General Requirements

- Your business must be eVA registered and in active status.
- **AVOID waiting until the day the solicitation closes to submit your response. Delaying submission could put your response at risk of not being accepted on time.**

1	Login to eVA	Login with your eVA account *user name* and *password* @ https://vendor.epro.cgipdc.com/loginEngine/index.jsp ** If you have not registered, click the *Register* button
2	Find the Solicitation	i. You will now be on the **All Opportunities** homepage ii. Enter solicitation number/description in **Keyword Search** iii. Click the **Search** **icon** or the **Enter** button iv. Click the **View Opportunity** button for the solicitation you wish to view Didn't find it? Use the **Refine Search** feature located to the left of page.
3	Review the Solicitation	Review the solicitation posting and attachments
4	Enter Your Response	i. Click the **Respond Online** button ii. If field is available, enter **Total Response Information** iii. Attach your files. *The maximum size allowed for each file is 60.0MB. a. Click **Attach Files** button b. Click **Browse**, locate the file you want to attach, and click **Open**, repeat as necessary c. Click **Attach File(s)** button NOTE: If you need to attach more than five files, repeat a-c. iv. Respond to **Evaluation Criteria, Reminders, Discounts,** and enter any **Overall Response Comments** as applicable. *For solicitations not requesting line item information, click **Next: Review & Submit** your response.* v. Click **Next: Line Items** button and click **Continue** to Warning vi. For lines you would like to respond to, enter your response in **Unit Price** and **Delivery Days** or **Contract Amount**. NOTE: Additional information per line item can be provided by expanding the **Comments**, **Product Specs**, and **Shipping/Handling Details** links. vii. For lines you do not want to respond to, select **No Response**.

5	Review & Submit Your Response	i. Click **Next: Review & Submit** button ii. Review response and click **Submit** iii. Click **Submit** on pop to confirm submission of response You will receive a **THANK YOU** confirmation screen once your response has successfully been submit and you may either print your response or return to the home page.
6	Verify Acceptance / Review Response	i. Click **Go to Home Page** button or click **Home** link (top of page) ii. Under the **My Buiness** tab, click **Response** iii. Find the solicitation number and corresponding Response ID, if labeled "Accepted" your response has been accepted iv. Click the response number to review the response
AMEND RESPONSE		
7	Amend response	i. From the **Home** page, under **My Buiness** tab click **Responses** ii. Find the latest version of your solicitation response and click the response number iii. Click **View/Edit Response** button (top of page) iv. Update information as necessary v. Click **Next: Review & Submit** button NOTE: You will receive a warning message for incomplete fields that required. vi. Review response and click **Submit** vii. Confirm submission of response by clicking **Submit** button on pop up. NOTE: You will receive a **THANK YOU** confirmation screen once your response has successfully been submit.
WITHDRAW RESPONSE		
8	Withdraw Response	i. From the **Home** page, under **My Buiness** tab click **Responses** ii. Find the latest version of your solicitation response and click the response number iii. Click **Withdraw** button (top of page) iv. Confirm and click **Withdraw** button on pop up v. Status under **My Online Response** will be **Withdrawn**

Additional Information

How Renewal Notifications Work

Sourcing & Contracting sends email notifications 90 days prior to the end of the original contract term for all Master Agreements. On the Master Agreement, Contract Officers are able to identify the number of days prior to the end of each additional term notifications are to be sent.

Line Number	Renewal Period Unit	Renewal Period Length	Notification Days (Prior to Expiration)	Effective Date	Expiration Date	Renewed	Disposition
1	1	Years	90	08/01/2016	07/31/2017	No	
2	1	Years	90	08/01/2017	07/31/2018	No	
3	1	Years	90	08/01/2018	07/31/2019	No	
4	1	Years	120	08/01/2019	07/31/2020	No	

From 1 to 4 Total: 4 First Previous Next Last Go to line: Go

Note: Line Number is the renewal term *(i.e.: 1 is the first renewal, 2 is the second renewal, etc.)*

The Contract Officer identified the first renewal term as one year (08/01/2016 to 07/31/2017) and requested notification 90 days prior to the expiration date of the first term. The email notification will be sent on 05/02/2017.

Who is notified?

Notifications are sent to the following individuals:

- **Contract Officer** identified on the Contract Summary Header in Contract Management,
- **Contract Administrator** identified on the Contract Summary Header in Contract Management, and
- **Contract Administrator** on the last version of the MA/MA,
- **Contract Officer** on the last version of the Master Agreement (MA/MA), and
- **Buyer** OR **Buyer Team** on the MA/MA.
  NOTE: The Buyer/Buyer Team is populated by the Procurement Folder assignment.

Only one email is sent per user ID in the event of the Buyer, Contract Admin, and/or Contract Officer is the same user ID.

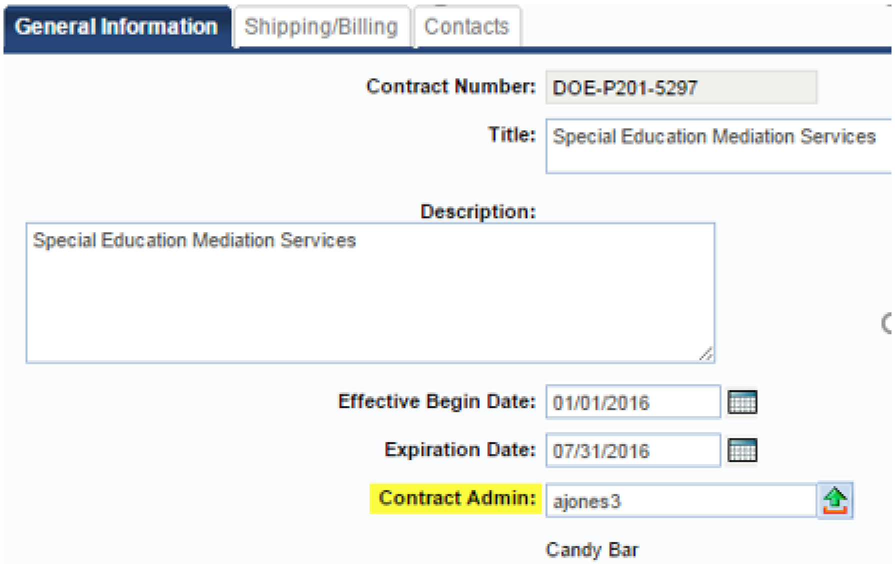
Contract Officer and Contract Administrator on the Contract Summary Header in Contract Management:

Special Education Mediation Services
Edit Contract Title

Contract Number: DOE-P201-5297
Category/Type of Contract: 50-Agency Mandatory Contract
Edit Contract Type
Contract Period : 01/01/2016 through 07/31/2016
Publish Contract:
Active Contract Period(s)

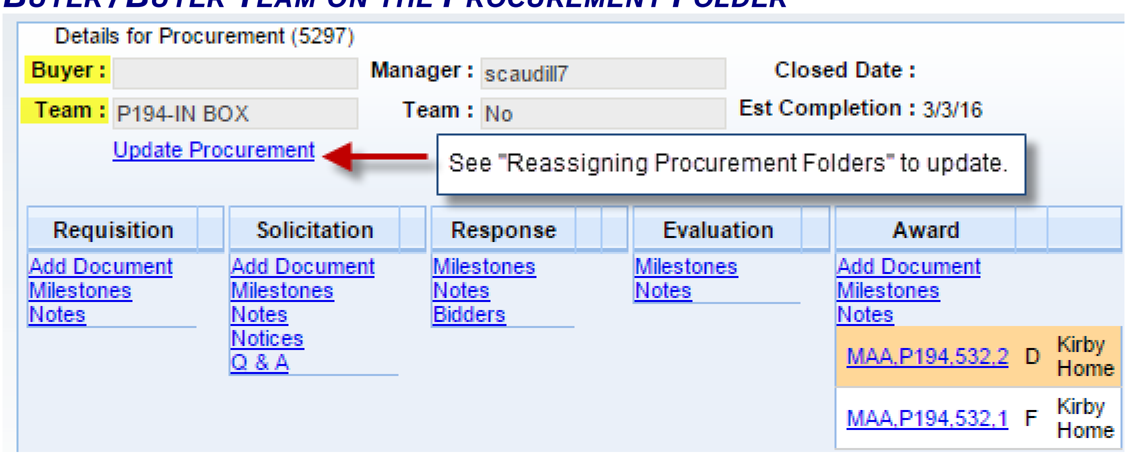
Contract Officer Edit Contract Officer	Lisa Kirby (Lisa.Kirby@dgs.virginia.gov) Phone: 804-786-8976	Contract Admin Edit Contract Admin	Dave Foster (victoria.beasley@dgs.virginia.gov) Phone: 804-225-4628

CONTRACT ADMINISTRATOR ON THE MA / MA:



Contract Officer and Buyer / Buyer Team on the MA / MA:

BUYER / BUYER TEAM ON THE PROCUREMENT FOLDER



How to Reassign a Procurement Folder

This document is a reference to use when reassigning Procurement Folders in Sourcing & Contracting.

General Requirements:

- You must have an active eVA buyer login and be listed as a manager of a team with the ***Sourcing & Contracting*** application enabled on your account.

Reassign a Procurement Folder		
Open Sourcing & Contracting		
1	Login to www.eva.virginia.gov	Enter your eVA User Name and Password
2	Click on the **Sourcing & Contracting** link	Located in the left menu of the **Knowledge Center** page under Applications.
Navigate to Procurement My Team Manages		
3	Click **Search > Page Search**	Quick links located on the left menu.
4	In the **Page Code** field, type **WKLDMT** and click **Browse**	TIP! When page loads, right click and select **Add to Favorites** to quickly access from your Favorites list in the left navigation.
5	Click **Procurement My Team Manages** link	
Find the Procurement Folder		
6	Click **Search** link	Located below the table of Procurement Folders.
7	Type the **Procurement Folder** number in the Procurement field and click **OK**	You may also search for a procurement folder using the fields available.
8	Click the row of the Procurement Folder	Row will highlight yellow.
Update Procurement Folder Assignment		
9	Click **Procurement My Team Manages Update** link	Located at bottom of field.
10	Update the **Buyer** and **Manager** as needed and click **OK**.	Lookup using pick list or enter eVA user id.