SUPPLIER GUIDE

LOCATING AND RESPONDING TO
A SOLICITATION

pennsylvania
DEPARTMENT OF GENERAL SERVICES

The Commonwealth of Pennsylvania
Department of General Services
Bureau of Procurement

www.dgs.state.pa.us/procurement
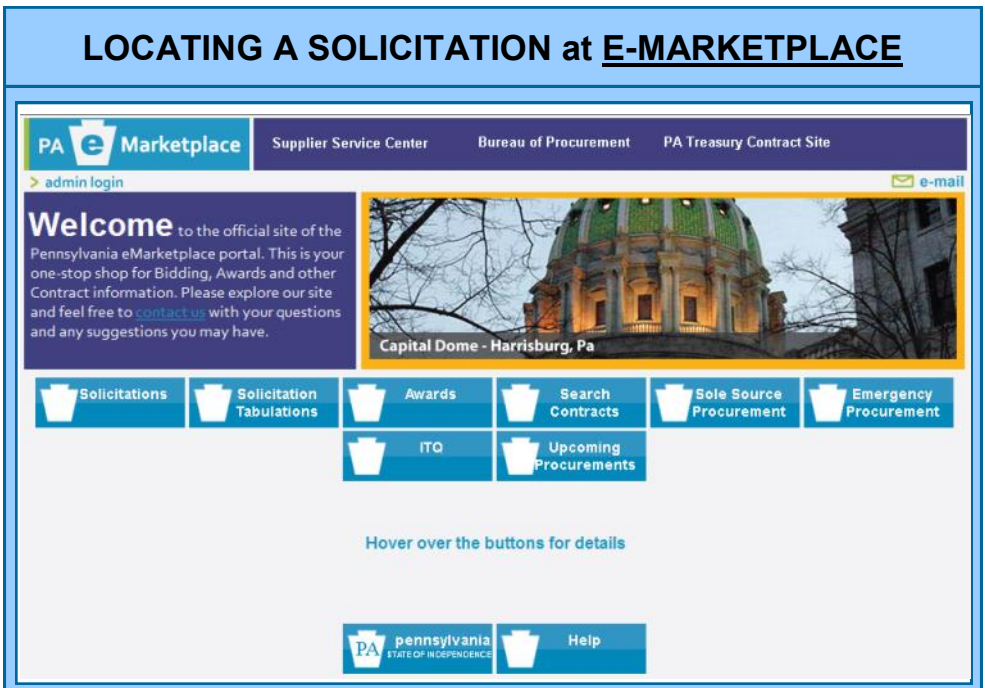
LOCATING AND RESPONDING TO A SOLICITATION

This guide is intended to provide you with instructions on locating current bidding opportunities and responding to solicitations.

There are two different ways to **Locate a Solicitation**. The most common is through E-Marketplace; navigation instructions are included below. The second is through the PA Supplier Portal; navigation instructions are included in the section following "Locating a Solicitation at E-Marketplace".

Also included later in this guide are detailed instructions on how to **Respond to**, **Change** or **Delete a Solicitation Response**.

All bidding opportunities (with an estimated cost in excess of $10,000) for materials and services for Commonwealth agencies are published at the Department of General Services' E-Marketplace website. However, to view the entire solicitation, you may need to login to the PA Supplier Portal. Your login and password are provided when supplier registration is completed.

LOCATING A SOLICITATION at E-MARKETPLACE

To locate current bidding opportunities, go to E-Marketplace, your one-stop shop for all bidding and contract information. The main page includes the following menu options:

- **Solicitations** – Search and view current solicitations.

- **Solicitation Tabulations** – An summary of the suppliers and responses to previous solicitations. *These tabulations are for information only and do not constitute an official award.*

- **Awards** – A list of all recent awards in response to Solicitations.

- **Search Contracts** – Search the Commonwealth database for state contracts awarded by DGS and other agency-selected contracts.

- **Sole Source Procurements** – Includes all agency requests for sole source purchases of supplies and services.

All current advertised solicitations can be found on E-Marketplace under the **Solicitations** tab. To locate a solicitation, follow these steps:

A. Select the **Solicitations** tab.

B. Start bidding search by entering or selecting specific search criteria in one or more of the available fields, then click on "Search".

C. Below are search results that provide a listing of current solicitations, based on the criteria selected. From here, specific solicitations can be viewed.

Search Result - Hover your mouse over the Description or Title text to get more details. (Internet Explorer Only)

No. of records per page: 10

Export Search Results

1 2 3

Solicitation#	Types	Solicitation Title	Description	Agency	County	Amended Date	Solicitation Start Date	Solicitation End Date	Bid Opening Date	Status	Contact Person
6100013977	IFB	HVAC Serivces for Si...	HVAC services consis...	Transportation	Monroe	12/1/2009	12/2/2009	12/18/2009	12/21/2009 11:00:00 AM	Open	Angelika DeFrancesco
6100014003	IFB	ELEVATOR MAINTENANCE	ELEVATOR & ESCALATOR...	Agriculture	Statewide	12/1/2009	12/2/2009	12/16/2009	12/16/2009 10:15:00 AM	Open	PEGGY LUCAS
CN00031664	R3-RFQ	Beef for Jan - Mar 2...	Beef for menu compli...	Corrections	Cumberland	12/1/2009	12/2/2009	12/16/2009	12/16/2009 1:00:00 PM	Open	Charmaine Linch
CN00031670	R3-RFQ	Eggs for Jan - Mar 2...	Eggs for menu compli...	Corrections	Statewide	12/1/2009	12/2/2009	12/16/2009	12/16/2009 11:00:00 AM	Open	Charmaine Linch
CN00031672	R3-RFQ	Drinks for Meals at ...	Drinks for SCI Camp ...	Corrections	Statewide	12/1/2009	12/2/2009	12/17/2009	12/17/2009 1:00:00 PM	Open	Charmaine Linch
05U030	IFB	Schuylkill Co./SR 61...	Requesting services ...	Transportation	Lehigh	12/1/2009	12/1/2009	12/30/2009	12/30/2009 2:00:00 PM	Open	Robert Herbein
227120109	RFP	HUMAC Norm Software ...	- REBID - Humac Norm...	State System of Higher Education	Chester	12/1/2009	12/1/2009	12/8/2009	12/8/2009 2:00:00 PM	Closed	Linda Brunner

D. After locating the solicitation, click on the underlined **Solicitation Number** to open the **Advertisement Information** page.

YOUR ADVERTISEMENT INFORMATION

General Information   Help

Department for this solicitation:	Procurement		
Date Prepared:	12/01/09	Types:	IFB
Advertisement Type:	Service		
Solicitation #:	6100013977	Solicitation Title:	HVAC Serivces for Site F & 41 in Monroe County

Description:

HVAC services consisting of routine preventative maintenance, repairing all heating, ventalation, and air-conditioning systems at the Roadside Rest and Welcome Center locations: I-80 Eastbound (exit 310), Monroe County, Delaware Water Gap, Site F and I-80 Eastbound (mike marker 293), Cresent lake, Site 41.

Department Information

Department/Agency:	Transportation	Delivery Location (limit of 300 characters):	I-80 Eastbound (exit 310), Monroe County, Delaware Water Gap Site F & I-80 Eastbound (mile marker 293), Cresent Lake, Site 41.
County (if applicable):	Monroe	Duration:	12 months, until Janurary 31, 2011, with four year renewal options

Contact Information

First Name:	Angelika	Last Name:	DeFrancesco
Phone Number:	610-871-4138 Ext:	Email:	adefrances@state.pa.us

Solicitation Information

Solicitation Start Date:	12/02/09	Solicitation End Date:	12/18/09
Opening Date:	12/21/09	Opening Time:	11:00 AM
Opening Location:	Department of Transportation District 5-0 1002 Hamilton Street Allentown, PA 18101		
		No. of Addendums: (# of versions)	

You must go to www.pasupplierportal.state.pa.us to complete this bid.

Amended Date:	12/01/09		

The **Advertisement Information** page (seen above) provides a general overview of the bid, which will specify if responses will only be accepted electronically. You must go to PA Supplier Portal to complete.

LOCATING A SOLICITATION at PA SUPPLIER PORTAL
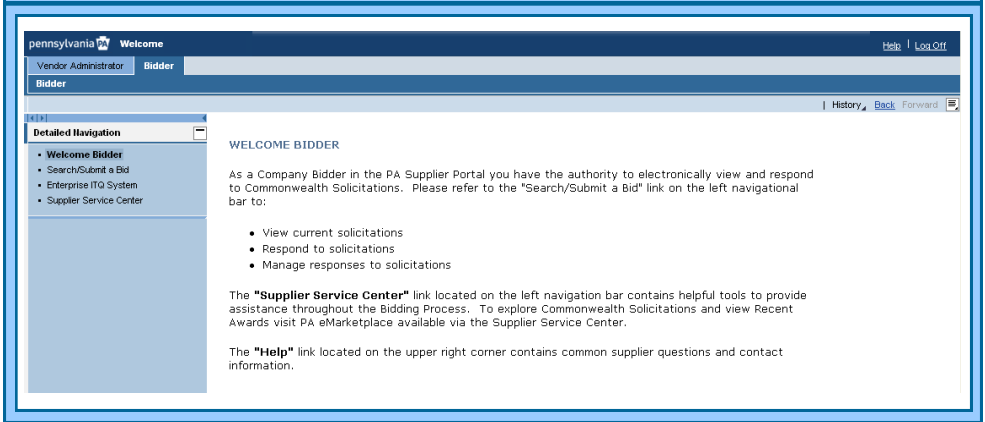
A. **Open your web browser and go to PA Supplier Portal. Browser compatibility is provided on the home page.**

B. **Select the Logon button.**
   - Enter the **Logon ID** and **Password** created during registration.
   - When the data entry is complete, select the **Log In** button.
   - The PA Supplier Portal Welcome Screen will display *(pictured above).*

C. **If you have been assigned both the Administrator and Bidder roles, the Vendor Administrator tab will be selected by default. Select the Bidder tab to proceed.**
   - A box will appear asking if you want to view secure content. Select "No".

D. **To begin your search for bidding opportunities, select the Search/ Submit a Bid link in the left navigation panel.**

E. **The Process Bid screen will display, and contains search fields to assist you in location solicitations.**
   - When the Bid Document number is known, enter it into the **Number of Document** field and select the **Start** button to initiate the search.
   - When the Bid Document number is *not* known, select the drop-down list in the **Status** field and choose one of the available options. Then select the **Start** button to initiate the search.

F. **A list of search results will display by using any search method.**
   - The **Display** icon (a magnifying glass) displays basic data and detailed information of the selected bid solicitation, as well as the Bidder's bid response after it is created.

- The **Bid Document** number is a link and, when selected, will open the bid solicitation for viewing.
- The **Change** or **Edit** icon (pencils) will allow information on a previously *held* or *submitted* bid to be changed by the bidder.
- The **Create** icon allows the bidder to create a bid response on behalf of their company on any open solicitation.
- The **Trash** or **Delete** icon is used by the bidder to delete a bid response.

G. Select one of the icons for a particular bid.

H. The <u>Display Invitation for Bid</u> screen opens for viewing.
- To exit this screen, select the **Back to Initial Screen** link. You will be returned to the search results list where you may continue to look for additional bidding opportunities.

---

*If you require assistance with the bidding process, please contact the **Customer Service Center** at **(877) 435-7363 or (717) 346-2676** and select **Option 2**.*

RESPONDING TO A SOLICITATION

Before responding to a solicitation, be sure that you have carefully reviewed the entire bid solicitation document and understand both the specifications and (if applicable) any special conditions. Additionally, take careful note of the solicitation's **End Date & Time** and **Opening Date & Time**.

The **End Date & Time** is when the solicitation officially expires. You may make changes to your submitted bid response until this time. The **Opening Date & Time** is when the solicitation responses will be opened and evaluated. To begin the **Bid Response** process, follow these directions:

A.   **Locate the bid solicitation that you wish to respond to.**

B.   **Select the Create icon to begin creating your response.**

C.   **The Process Bid screen will display.**

D.   **On the General Data tab, complete the Attributes sub-tab.**

E.   **Attributes are a series of questions to which responses are required. Read each question carefully. Select the drop-down button in the Reply field and choose your response from the list.**
    - Where directed, enter any additional information associated with the question into the comment field. If you do not reply to every **Mandatory Attribute Question**, you will receive an error message when submitting your Bid Response.

F.   **Complete the Information from Purchaser sub-tab.**
    - Within the **Information from Purchaser** sub-tab, you will find information from the Commonwealth which describes the specifications and conditions of the solicitation. The information may be entered as text in the **Tendering Text** or **Purchaser's Remarks** fields, or as a document attached to the solicitation.
    - Open all attachments by selecting the document name link and carefully review them before submitting your response. Many solicitations require that an **attachment** (such as a form, for example) be completed and returned with your bid response. In these cases, you must first open the document and save it to your computer desktop or another electronic file. Then complete the document as required and re-save the document with your updated information. To re-attach this document to the bid, you will need to go to the **My Notes** sub-tab.

G.   **Complete the My Notes sub-tab. My Notes contains two areas: Texts and Attachments.**
    - Within **Texts** is **Bidder's Remarks**, where you would type any

comments or information associated with your response. When entering comments in this field, be careful not to include any statements that would conflict with the specifications or terms and conditions of the solicitation. *If this occurs, your bid response could be rejected.*

- The **Attachments** area provides the ability to attach any documents to your bid response. Be careful not to attach anything that would indicate a change or conflict with the specifications or terms and conditions of the solicitation. *If this occurs, your bid response could be rejected.*

H. Review the <u>Partner/Delivery Address</u> sub-tab for any delivery address information for the materials or services being requested for the solicitation. Do not change anything under "Partner/Delivery Address" unless instructed by the Commonwealth.

I. Review the <u>Conditions</u> sub-tab for any conditions such as discounts off of gross prices or surcharges, which are associated with a specific line item. Do not change anything under "Conditions" unless instructed by the Commonwealth.

J. Upon selection of the <u>Item Data</u> tab, you will be defaulted to the <u>Item Overview</u> screen. This screen displays basic information about each of the line items in the bid solicitation. The solicitation may specify pricing (worksheet, catalog, price list) to be added as an attachment under <u>My Notes</u> or pricing may be entered under <u>Item Data</u> tab. To begin entering information into the line item, select the line item number and the **Display** icon. You will automatically be on the line item's **Basic Data** screen. As required, complete these fields.

- **Vendor's Product Number:** If applicable, enter your company's product number in this field.
- **Manufacturer:** If your product is produced by a manufacturer, you may enter it in this field. You may also perform a search for the manufacturer by selecting the **Find** icon.
- **Manufacturer Part Number:** If the manufacturer's part number is different than your company's part number, enter it in this field.
- **Price:** Enter your company's price in this field.
- **Per** and **Target Value Bid:** These two fields should remain blank. **The "Per" field defaults as per the solicitation.**
- **Delivery Time (Duration):** Enter your estimated lead time for delivery in this field. Notice that the Duration (days, weeks) defaults into the bid response based upon what was entered in the solicitation.
- **Incoterm:** Review this field to ensure that it displays **FOB Destination** as the delivery term. If it does not, select the **Find** icon and correct it by

selecting the FOB from the results page.
- **Origin Acceptance:** This field is to remain blank.
If the solicitation contains more than one line item, repeat the steps
described to complete each line item.

K. The remaining sub-tabs on the Item Data tab are very similar to those on the General Data tab, and should be completed accordingly for the applicable line item.
  - **Schedule Line:** This sub-tab relates to delivery schedules, and should only be addressed if applicable.
  - **Information from Purchaser:** This sub-tab should contain details and attachments specific to that particular line item. Review and address any instructions, as necessary.
  - **My Notes:** Enter any notes back to the Commonwealth, as necessary.
  - **Conditions:** If applicable, enter the percent discount off of a manufacturer's price list or catalog for the associated line item.
  - **Partner/Delivery Address:** Review for any delivery address information for the requested materials or services specific to the line item.

L. Select the Check button to review any resulting errors and/or messages.
  - Fix any resulting errors as needed, which are marked with orange squares. Any messages marked with a yellow triangle are informational only.

M. Select the Submit button to submit your solicitation response. If you're not ready to submit, select the Hold button.
  - A message confirming your actions will display.

N. After your have submitted your solicitation response, you will have the option to print a copy by selecting the Output Preview button.

O.   If you don't want to prepare any responses to additional solicitations at this time, select the Log Off button to end your session in the Supplier Portal.

An e-mail confirmation will be sent to the e-mail address specified at the
time of your registration, and it will verify that your bid response has been

*If you require assistance with the bidding process, please contact the **Customer Service Center** at **(877) 435-7363 or (717) 346-2676** and select **Option 2**.*

CHANGING A SOLICITATION RESPONSE

A. **Log on and select the Bidder tab.**

B. **Locate and select the solicitation response that you wish to change. A change can be initiated in either of these two ways:**
- Select the **Change** icon. Your solicitation response will open in **Change Mode** and you will be able to make any changes as necessary.
- Select the number of the applicable bid to open it in **Display Mode**, then select the **Change** button (located at the top of the screen) to switch the document over to **Change Mode.** Make any changes as necessary.

C. **When the changes to your response are complete, select the Check button. Review any errors or messages as described previously.**

D. **Select the Submit button to re-submit your solicitation response. If you're not ready to re-submit, select the Hold button again.**

E. **After you have re-submitted your solicitation response, you will have another option to print a copy for your records. Select the Output Preview button (located at the top of the screen) to do so.**

F. **Select the Log Off button to end your session in the Supplier Portal.**

NOTE: If you place a solicitation response on "Hold", you can submit it by following the **Changing A Solicitation Response** instructions.

DELETING A SOLICITATION RESPONSE
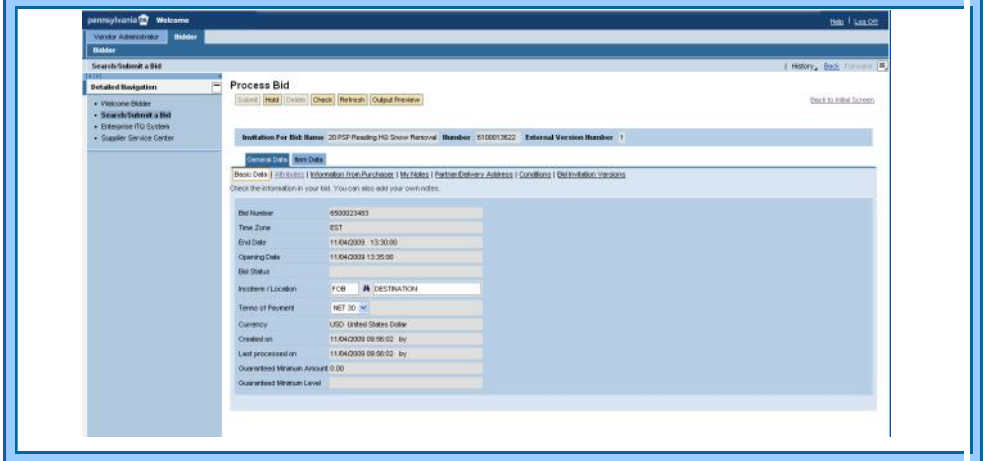
You may delete a solicitation response at any time <u>prior</u> to the solicitation's end date. To do this, the response must be in **Held** or **Submitted** status.

A. Log on and select the <u>Bidder</u> tab.

B. Locate and select the solicitation response that you wish to delete.
   - Select the number of the applicable bid to open it in **Display Mode**.
   - Select the **Change** button to switch the document to **Change Mode**.
   - If the **Delete** button is active, select it to delete the solicitation response.
   *Please note that it may be necessary to select a tab or field (and possibly make a change in that field) to activate the **Delete** button.*

C. The Supplier Portal will prompt you to verify that you really want to delete the bid. Select the <u>OK</u> button to confirm the deletion.

D. Select the <u>Log Off</u> button to end your session in the Supplier Portal.

If you require assistance with the bidding process, please contact the **Customer Service Center** at **(877) 435-7363** and select **Option 2**.

For more information about Supplier Response to a Solicitation, please contact:

Customer Support Center
(877) 435-7363, Option #2

Department of General Services
Bureau of Procurement
555 Walnut Street, 6th Floor
Harrisburg, PA 17101

www.dgs.state.pa.us/procurement

Elizabeth Lenhart, Program Manager
Phone: (717) 346-4298

Kenneth A. Rapp
Deputy Secretary, Procurement

Sheri Phillips
Secretary, Department of General Services

Tom Corbett
Governor

REVISED JANUARY 2013