Locating and Responding to a Solicitation

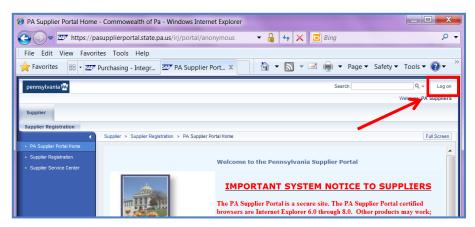
<u>Locating a Solicitation</u> | <u>Viewing the Solicitation</u> | <u>Header Tab</u> | <u>Items Tab</u> |

Responding to the Solicitation | Edit a RFx Response | Withdraw/Re-Submit a RFx Response

Locating a Solicitation

Log into the **PA Supplier Portal** to search for and locate a specific Solicitation in SRM.

- 1. Open your web browser and enter www.pasupplierportal.state.pa.us.
- 2. Select the **Log on** button.



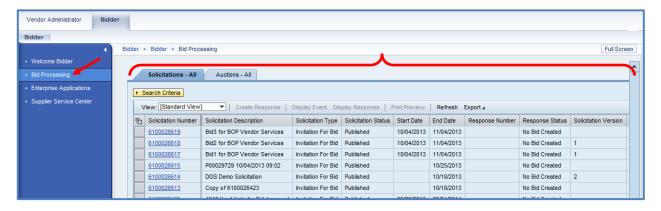
3. Enter the User ID and Password you created when you registered as a supplier, and select the **Log On button**.



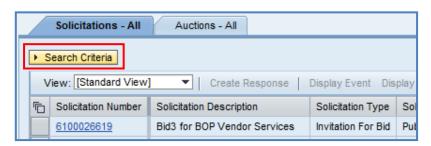
4. Choose the **Bidder** role to begin. (Note – If you have been assigned only the Bidder role by your company, you will not need to perform this step because it will already be chosen by default.)



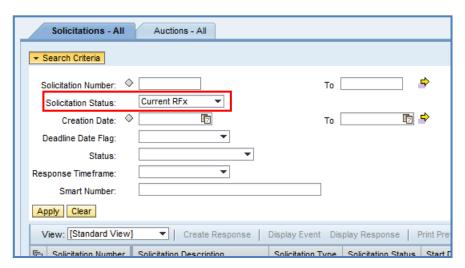
The resulting *Bid Processing* screen opens and will display your Personal Object Worklist (POWL). By default, the POWL will display all Solicitations (or RFx's) which are currently open for responses.



5. If the search window for *Solicitation Number*, etc. is not visible, select the **Search Criteria** button to display the available search fields.



By default, the **Solicitation Status** field will display <u>Current RFx</u> because those are open for your Bid Response. (It is not recommended that you adjust the search criteria in your POWL with the status <u>Ended RFx</u> or <u>Completed RFx</u>.)





There are numerous ways to search for and locate a specific Solicitation using the POWL Search Criteria.

Solicitation Number: The number assigned to the Solicitation document.

Solicitation Status: Used to display one of three (3) available statuses for the Solicitation document.

- Current RFx (system default)
- Ended RFx
- Completed RFx

Creation Date: The data that the Solicitation was created.

Deadline Date Flag: Used to display one of five (5) available timeframes for Solicitation submission deadlines.

- Today
- Next 7 Days
- Next 30 Days
- Next 90 Days
- Next 12 Months

Status: Used to display one of seven (7) available statuses for the supplier's bid Response document.

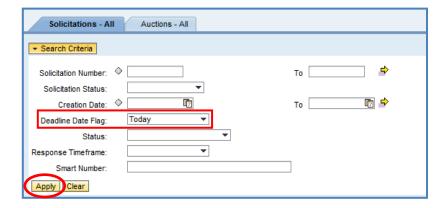
- Saved
- Bid submitted
- Bid Rejected
- Bid Accepted
- Transaction Completed
- Deleted
- Bid returned

Response Timeframe: Used to display one of five (5) available timeframes during which the supplier submitted their bid Response document.

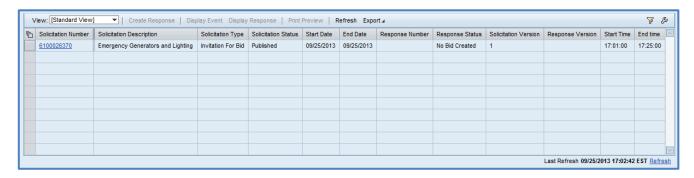
- Today
- Last 7 Days
- Last 30 Days
- Last 90 Days
- Last 12 Months

Smart Number: The name and/or other information used to identify the Solicitation document.

6. Change the search criteria if desired, and select the **Apply** button to save and execute the new query.



Your search result(s) will display in a table format, as shown in the example below:





In the search result, note the information under each column heading:

Solicitation Number: The number assigned to the Solicitation document.

Solicitation Description: The name or other identification associated with the Solicitation document.

Solicitation Type: The [transaction] profile type of the Solicitation.

Solicitation Status: The status of the Solicitation.

Start Date: The date that the Solicitation will be available for supplier Responses. (If you attempt to view or respond to the Solicitation before the Start Date, it will not be available.)

End Date: The deadline date for submission of bid Responses.

Response Number: The number assigned to your company's Response to the Solicitation.

Response Status: The status of your company's Response to the Solicitation.

Solicitation Version: The most current version of the Solicitation.

Response Version: The most current version of your company's Response to the Solicitation.

Start Time: The time that the Solicitation will be available for Responses.

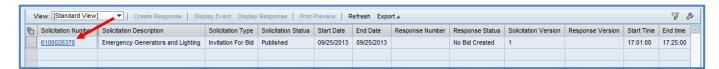
End Time: The deadline time for submission of bid Responses.

View/Respond to a Solicitation

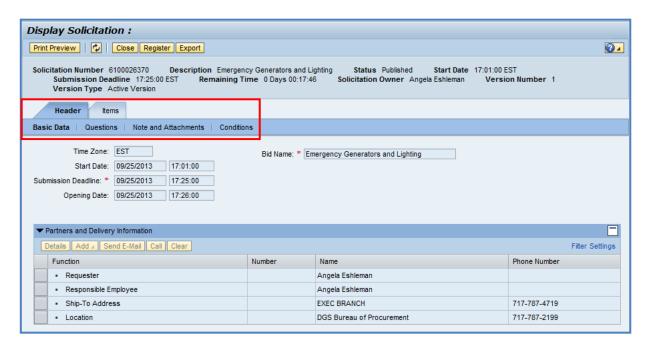
After locating a Solicitation, it is very important that you carefully review the entire document prior to creating and submitting your response. Ensure that you understand all requirements of the Solicitation. If you do not, and need clarification, contact the Commonwealth Purchasing Professional Agent who is responsible for the Solicitation.

Viewing the Solicitation

1. Select the Solicitation number to display the document.



The *Display* function allows you to see the solicitation data on two tabs: <u>Header</u> and <u>Items</u>. These two tabs are each broken down into sub-tabs.





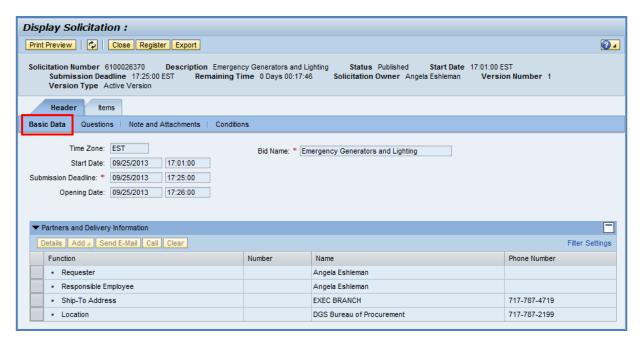
You may also view, download, and/or print an Adobe PDF copy of the Solicitation document by selecting the **Print Preview** button.



Header Tab

The *Header* tab provides information that is pertinent to the Solicitation as a whole (as opposed to line item-specific). By default, you are on the *Header* tab, *Basic Data* sub-tab.

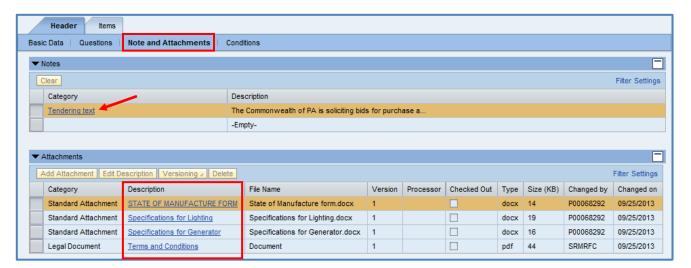
The *Basic Data* sub-tab contains details such as the **Start/Submission Deadline Dates** and times, and the **Opening Date** and time. It also contains information pertaining to the Commonwealth Purchasing Professional who is responsible for the Solicitation.



2. Select the Notes and Attachments sub-tab.

The *Notes and Attachments* sub-tab contains information provided by the Commonwealth to further describe the specifications and conditions of the Solicitation. Information can be displayed as text and/or document attachment(s).

- 3. Select the **Tendering Text** link to display text.
- 4. Select the document link in the **Description** column to display an attachment.





Important Note: The attachments provided by the Commonwealth can be accessed at this time only.

After selecting Create Response as described on Page 4-* of this Guide, the new *Notes and Attachments* section is reserved for the supplier to add their own comments along with uploading completed documents.

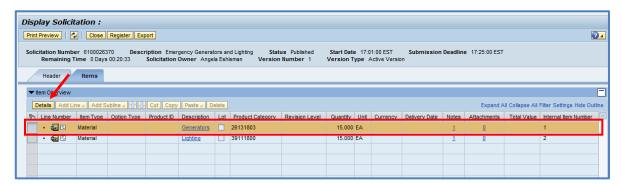
Be sure to open and save any required files to your computer before creating a response.

Items Tab

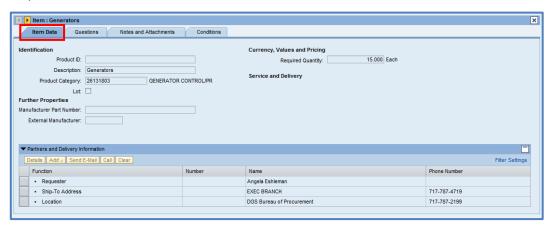
The *Items* tab provides information associated with specific line items, including Quantities and Units of Measure.

In the *Item Overview* area, you will find a listing of all line items in the Solicitation.

5. To view additional line item detail, first choose (highlight) the applicable line item, and then select the **Details** button.

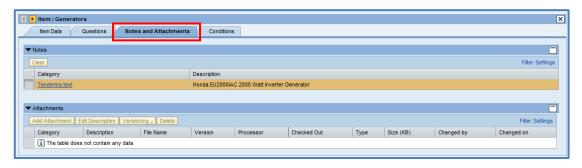


Depending on the type of procurement, the *Item Data* sub-tab may contain additional detailed requirements such as **Manufacturer Part Number** and **External Manufacturer**, etc.



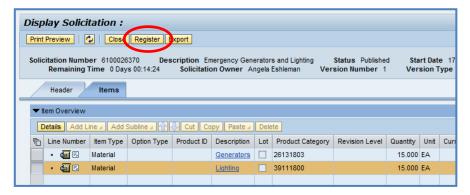
6. Select the Notes and Attachments sub-tab.

Here the *Notes and Attachments* sub-tab contains information which is specific to the line item. Again, information can be displayed as text and/or document attachment(s).



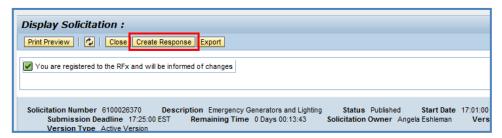
Responding to the Solicitation

1. Select the **Register** button.



The message "You are registered to the RFx and will be informed of changes" is returned.

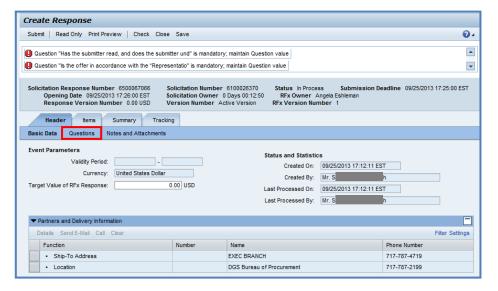
2. Select the **Create Response** button.



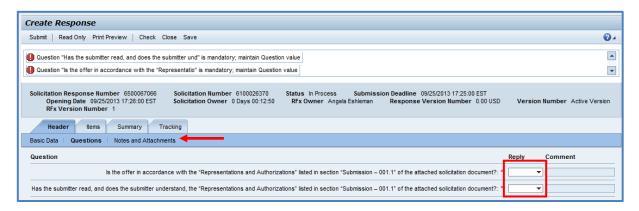
The *Create Response* screen is displayed. (For the moment, disregard the error messages at the top of the page. They will be resolved while processing the Response.)

By default, you are on the **Header** tab, *Basic Data* sub-tab.

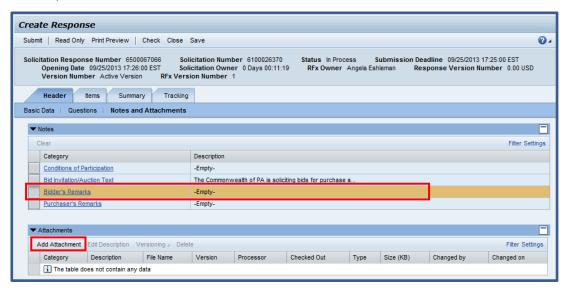
3. Select the Questions sub-tab.



- 4. Respond to each of the questions by selecting the dropdown in the **Reply** column.
- 5. Select the Notes and Attachments sub-tab.



6. Enter any applicable notes under *Bidder's Remarks*, and/or *Add Attachments* into your bid Response.

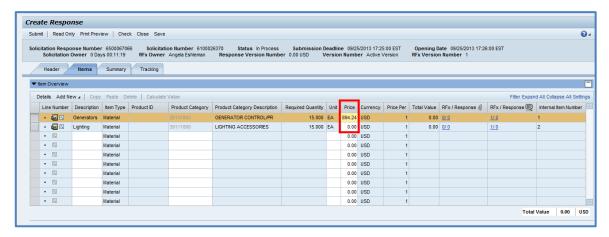




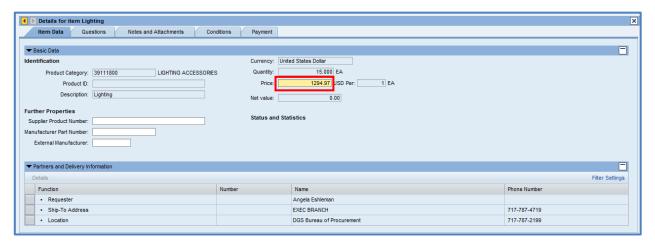
Important Note: If the solicitation requires that a price list be completed and attached, it should be done at this time.

In this instance, you would not perform Steps 7-9 below to enter line item prices.

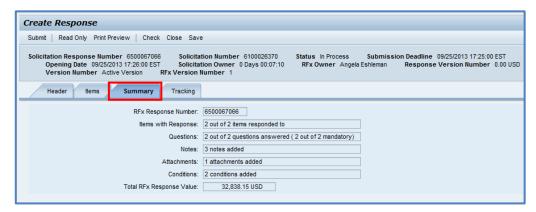
- 7. Select the Items tab.
- 8. In the *Item Overview* area, enter your pricing data in the **Price** field for each line item.



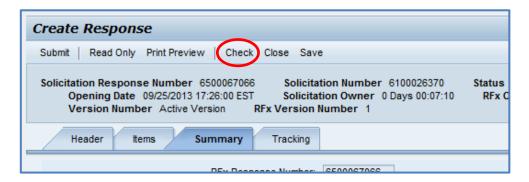
9. Alternately, select the **Details** button to enter pricing data at the item detail level.



- 10. Select the Summary tab.
- 11. Carefully review all of the information displayed. If necessary, make any corrections to the bid Response entries. (Note that **Conditions** means pricing; in the example below, *2 conditions* added means that prices were submitted for 2 line items.)



12. Select the Check button.



13. Review all resulting messages and resolve any errors, if applicable.

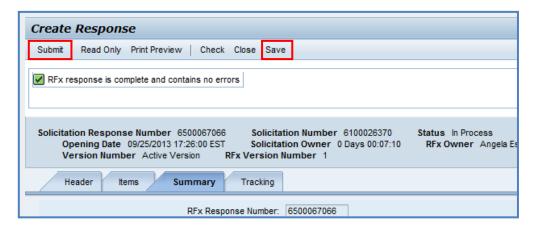


Note: If the solicitation requires that a price list be completed and attached, it should be done at this time.

In this instance, you would not perform Steps 7-9 below to enter line item prices.

Errors that must be resolved in order for you to submit your bid response are indicated by ①. Messages with △are provided for informational purposes only and can be disregarded.

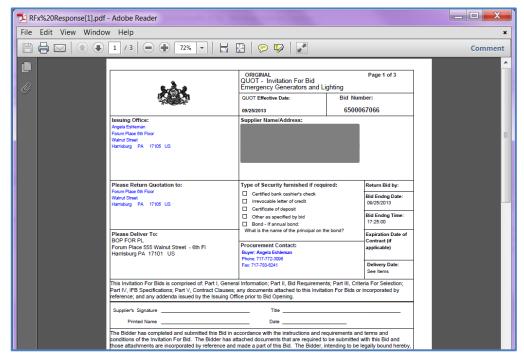
14. Select the **Submit** button if your bid response is complete, or **Save** if you are not yet ready to submit.



A corresponding message will display that your bid has been Held or Submitted.

15. If you wish, select the **Print Preview** button to see your entire Response in PDF format.



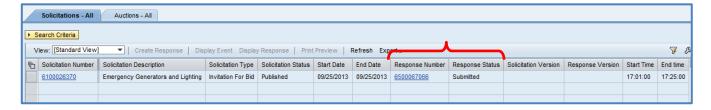


16. Select the **Close** button to exit your bid Response.

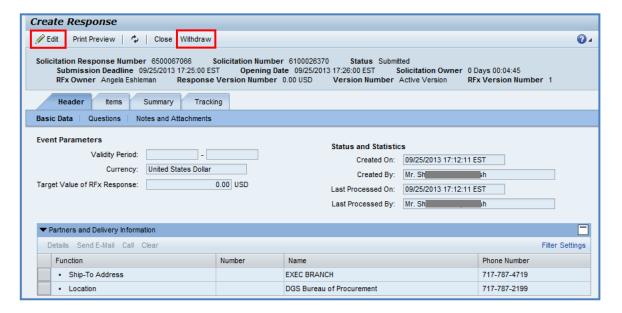


The POWL refreshes to display the submitted Response Number and Response Status.

17. If you wish to make any edits and/or withdraw your Response prior to the Submission Deadline, select the *Response Number* link.



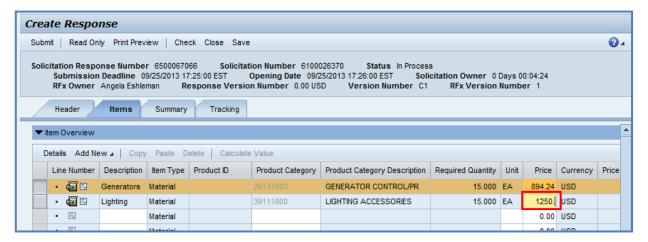
- 18. Select the **Edit** button to begin making changes.
- 19. Alternately, select the Withdraw button to withdraw your Response.



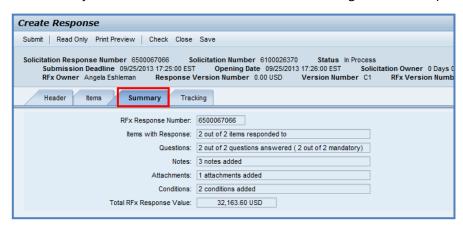
Edit a RFx Response

- 1. Select the **Edit** button to begin making changes.
- 2. Navigate through the document and make any necessary changes.

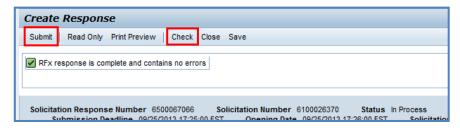
In the below example, we have revised the price for Line Item 2.



- 3. Select the Summary tab.
- 4. Carefully review the revised information, including the new Response Value.

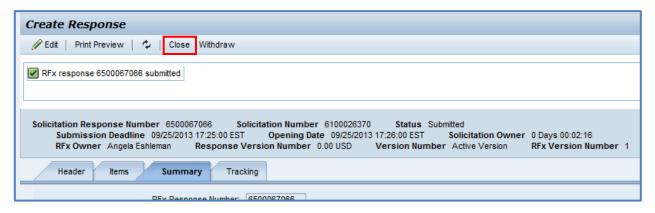


- 5. Select the **Check** button, and address any resulting error messages.
- 6. Select the **Submit** button.



A message displays confirming submission of the updated Response.

7. Select the **Close** button to exit your bid Response.



Withdraw/Re-Submit a RFx Response

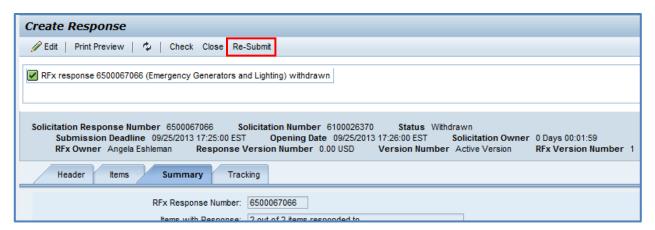
1. Select the **Withdraw** button prior to the Submission Deadline to withdraw your bid Response.



A message displays confirming that the Response was withdrawn.

Note that the option to *Re-Submit* becomes available.

2. Select the **Re-Submit** button to resubmit the Response.



A message displays confirming resubmission of the Response.

3. Select the **Close** button to exit your bid Response.





If you need assistance with viewing and/or responding to a solicitation in the **PA Supplier Portal**, please contact the *Customer Service Center* by dialing toll-free (877) 435-7363 and select Option 2, or send an e-mail to **srmhelp@pa.gov**.

END