

Locating and Responding to a Solicitation

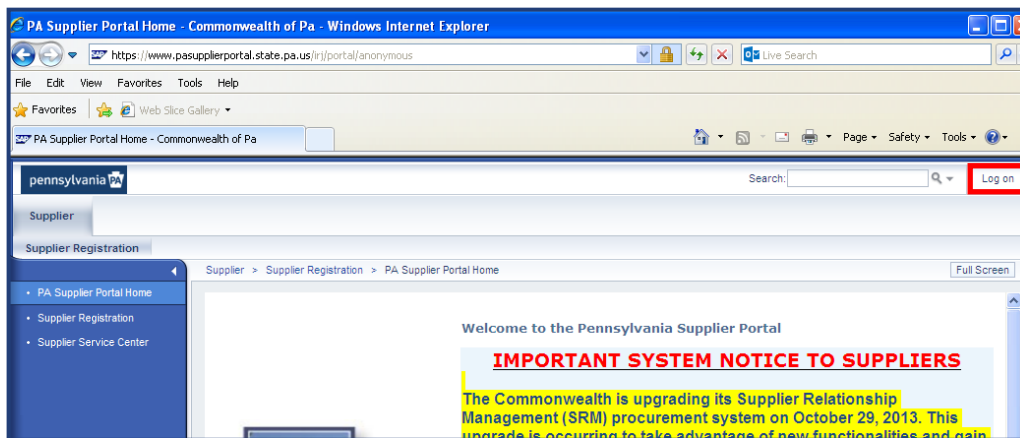
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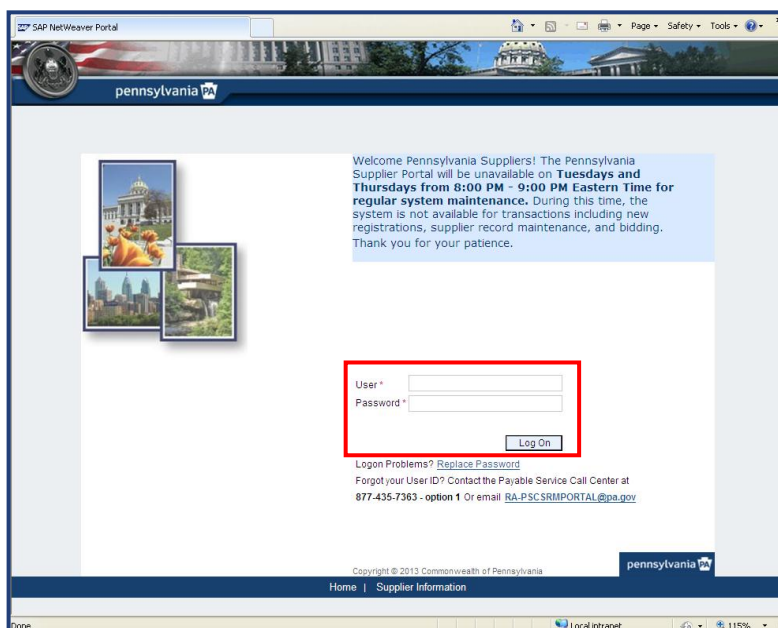
Locating a Solicitation

Log into the [PA Supplier Portal](#) to search for and locate a specific Solicitation in SRM.

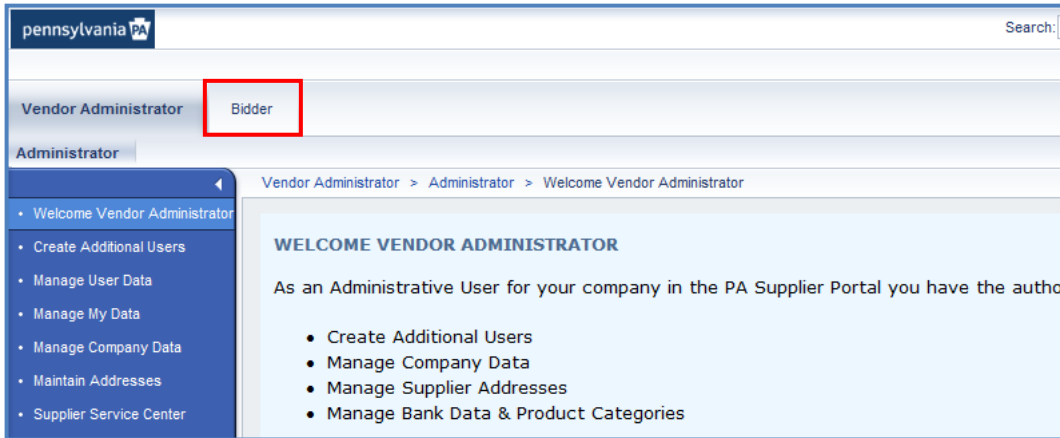
1. Open your web browser and enter www.pasupplierportal.state.pa.us.
2. Select the **Log on** button.



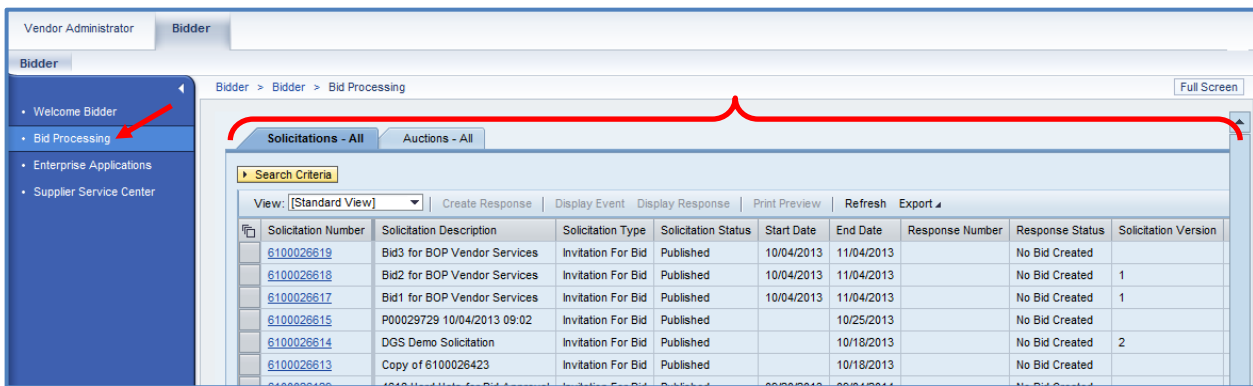
3. Enter the User ID and Password you created when you registered as a supplier, and select the **Log On** button.



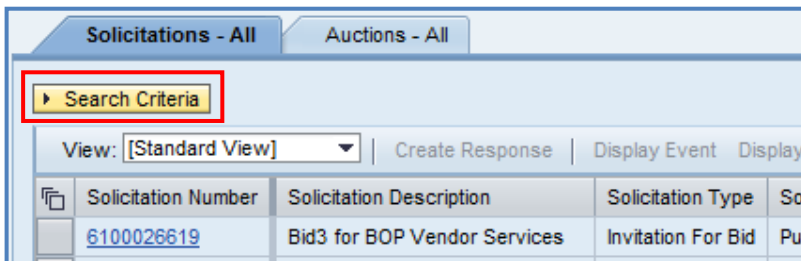
- Choose the **Bidder** role to begin. (Note – If you have been assigned only the Bidder role by your company, you will not need to perform this step because it will already be chosen by default.)



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.



- Select the **Search Criteria** button to display the available search fields.



By default, the **Solicitation Status** field will display Current RFX. However, you may adjust the search criteria in your POWL at any time to customize your queries.

The screenshot shows the 'Solicitations - All' tab in the POWL interface. The 'Search Criteria' section is expanded, showing various search filters. The 'Solicitation Status' dropdown is highlighted with a red box, indicating it is the current selection. Below the search criteria are 'Apply' and 'Clear' buttons. At the bottom of the interface, there is a 'View' dropdown set to 'Standard View' and several action buttons: 'Create Response', 'Display Event', 'Display Response', and 'Print Pre'.



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.

The screenshot shows a search criteria form with the following fields:

- Solicitation Number: To
- Solicitation Status:
- Creation Date: To
- Deadline Date Flag:**
- Status:
- Response Timeframe:
- Smart Number:

Buttons: **Apply** (circled in red), Clear

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

Solicitation Number	Solicitation Description	Solicitation Type	Solicitation Status	Start Date	End Date	Response Number	Response Status	Solicitation Version	Response Version	Start Time	End time
6100026370	Emergency Generators and Lighting	Invitation For Bid	Published	09/25/2013	09/25/2013		No Bid Created	1		17:01:00	17:25:00

Last Refresh 09/25/2013 17:02:42 EST [Refresh](#)



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 Responses.

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.

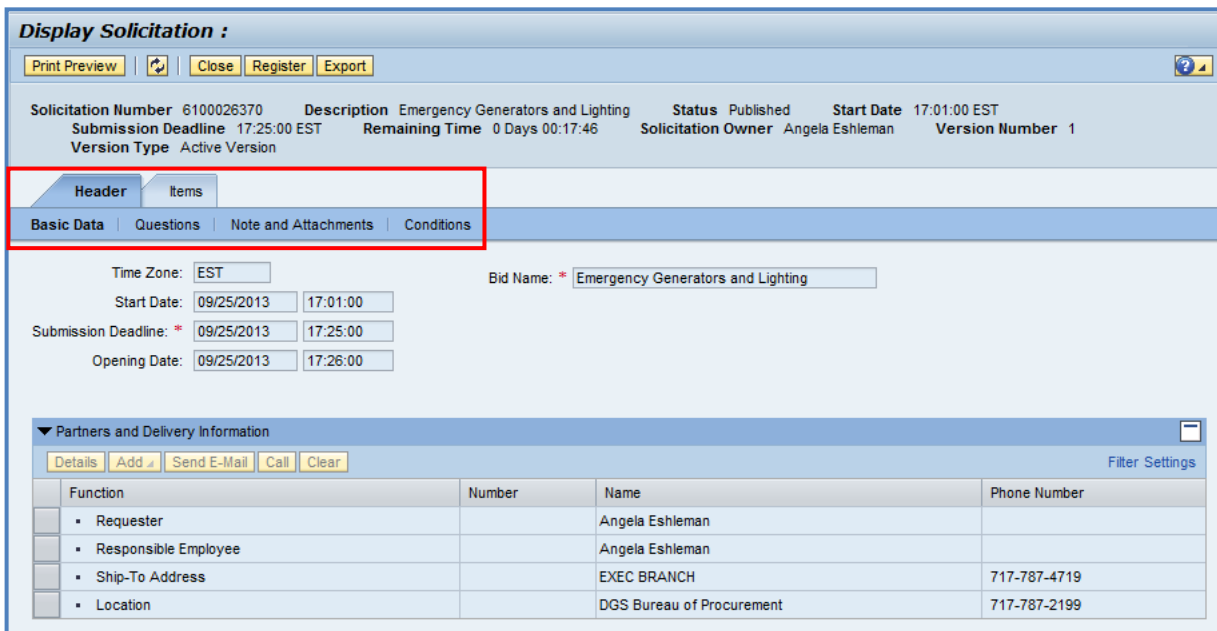
Viewing the Solicitation

1. Select the Solicitation number to display the document.



Solicitation Number	Solicitation Description	Solicitation Type	Solicitation Status	Start Date	End Date	Response Number	Response Status	Solicitation Version	Response Version	Start Time	End time
6100026370	Emergency Generators and Lighting	Invitation For Bid	Published	09/25/2013	09/25/2013		No Bid Created	1		17:01:00	17:25:00

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



Display Solicitation :

Print Preview | Close | Register | Export

Solicitation Number: 6100026370 Description: Emergency Generators and Lighting Status: Published Start Date: 17:01:00 EST
Submission Deadline: 17:25:00 EST Remaining Time: 0 Days 00:17:46 Solicitation Owner: Angela Eshleman Version Number: 1
Version Type: Active Version

Header | Items

Basic Data | Questions | Note and Attachments | Conditions

Time Zone: EST Bid Name: * Emergency Generators and Lighting

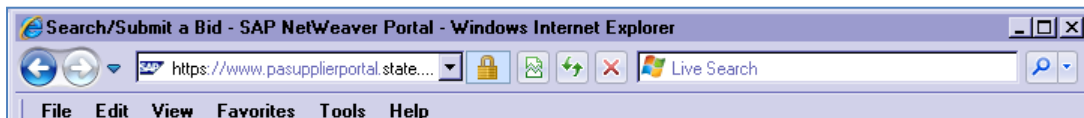
Start Date: 09/25/2013 17:01:00
Submission Deadline: * 09/25/2013 17:25:00
Opening Date: 09/25/2013 17:26:00

Partners and Delivery Information

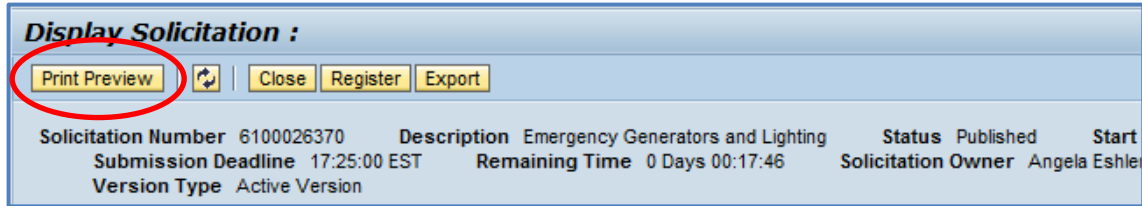
Function	Number	Name	Phone Number
Requester		Angela Eshleman	
Responsible Employee		Angela Eshleman	
Ship-To Address		EXEC BRANCH	717-787-4719
Location		DGS Bureau of Procurement	717-787-2199



Caution – do not use Internet Explorer’s navigation controls:



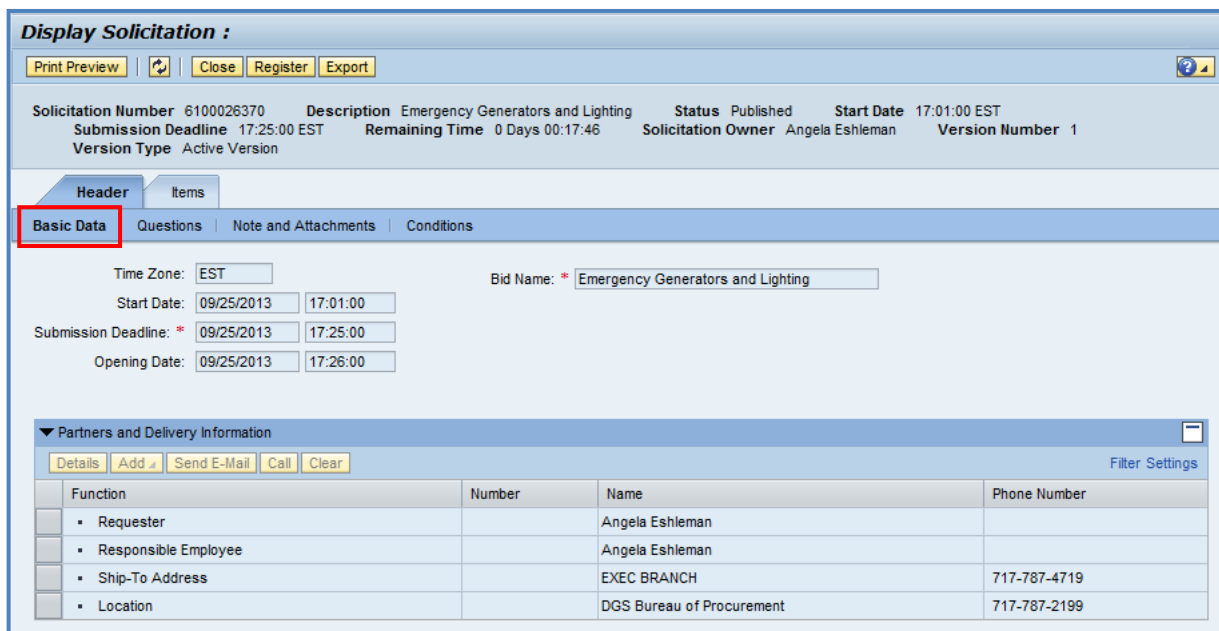
You may also view, download, and/or print an Adobe PDF copy of the Solicitation document by selecting the **Print Preview** button.



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.

The screenshot shows the 'Note and Attachments' sub-tab. Under the 'Notes' section, there is a table with two columns: 'Category' and 'Description'. The 'Category' column has a link 'Tendering text' highlighted with a red arrow. The 'Description' column has the text 'The Commonwealth of PA is soliciting bids for purchase a...'. Below this, there is an 'Attachments' section with a table. The table has columns: 'Category', 'Description', 'File Name', 'Version', 'Processor', 'Checked Out', 'Type', 'Size (KB)', 'Changed by', and 'Changed on'. The 'Description' column is highlighted with a red box, and the first row contains the text 'STATE OF MANUFACTURE FORM'.

Category	Description	File Name	Version	Processor	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	STATE OF MANUFACTURE FORM	State of Manufacture form.docx	1		<input type="checkbox"/>	docx	14	P00068292	09/25/2013
Standard Attachment	Specifications for Lighting	Specifications for Lighting.docx	1		<input type="checkbox"/>	docx	19	P00068292	09/25/2013
Standard Attachment	Specifications for Generator	Specifications for Generator.docx	1		<input type="checkbox"/>	docx	16	P00068292	09/25/2013
Legal Document	Terms and Conditions	Document	1		<input type="checkbox"/>	pdf	44	SRMRFC	09/25/2013

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.

The screenshot shows the 'Display Solicitation' window. At the top, there are buttons for 'Print Preview', 'Close', 'Register', and 'Export'. Below that, there is a header section with fields for 'Solicitation Number', 'Description', 'Status', 'Start Date', and 'Submission Deadline'. The 'Items' tab is selected, and the 'Item Overview' section is visible. The 'Details' button is highlighted with a red arrow. Below the 'Details' button is a table with columns: 'Line Number', 'Item Type', 'Option Type', 'Product ID', 'Description', 'Lot', 'Product Category', 'Revision Level', 'Quantity', 'Unit', 'Currency', 'Delivery Date', 'Notes', 'Attachments', 'Total Value', and 'Internal Item Number'. The first row is highlighted with a red box.

Line Number	Item Type	Option Type	Product ID	Description	Lot	Product Category	Revision Level	Quantity	Unit	Currency	Delivery Date	Notes	Attachments	Total Value	Internal Item Number
1	Material			Generators		26131803		15.000	EA			1	0		1
2	Material			Lighting		39111800		15.000	EA			1	0		2

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.

Item : Generators

Item Data | Questions | Notes and Attachments | Conditions

Identification
 Product ID:
 Description:
 Product Category: GENERATOR CONTROL/PR
 Lot:

Currency, Values and Pricing
 Required Quantity: Each

Service and Delivery

Further Properties
 Manufacturer Part Number:
 External Manufacturer:

Partners and Delivery Information

Details | Add | Send E-Mail | Call | Clear | Filter Settings

Function	Number	Name	Phone Number
Requester		Angela Eshleman	
Ship-To Address		EXEC BRANCH	717-787-4719
Location		DGS Bureau of Procurement	717-787-2199

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).

Item : Generators

Item Data | Questions | **Notes and Attachments** | Conditions

Notes

Clear | Filter Settings

Category	Description
Tendering text	Honda EU2000iAC 2000 Watt Inverter Generator

Attachments

Add Attachment | Edit Description | Versioning | Delete | Filter Settings

Category	Description	File Name	Version	Processor	Checked Out	Type	Size (KB)	Changed by	Changed on
The table does not contain any data									

Responding to the Solicitation

1. Select the **Register** button.

Display Solicitation :

Print Preview | Refresh | Close | **Register** | Export

Solicitation Number 6100026370 Description Emergency Generators and Lighting Status Published Start Date 17
 Remaining Time 0 Days 00:14:24 Solicitation Owner Angela Eshleman Version Number 1 Version Type

Header | **Items**

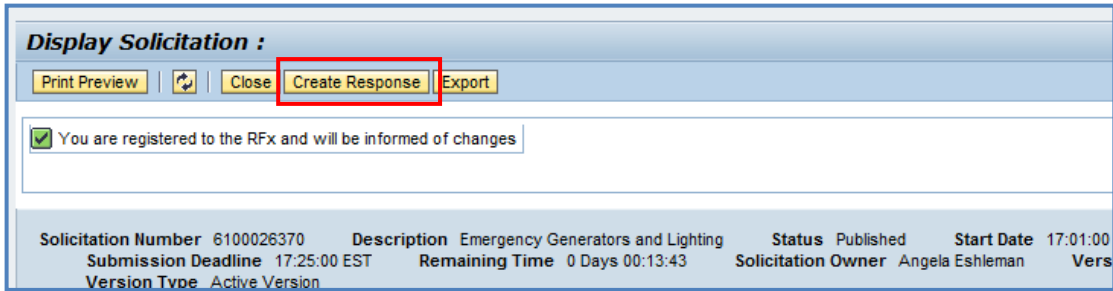
Item Overview

Details | Add Line | Add Subline | Up | Down | Cut | Copy | Paste | Delete

Line Number	Item Type	Option Type	Product ID	Description	Lot	Product Category	Revision Level	Quantity	Unit	Curr
1	Material			Generators	<input type="checkbox"/>	26131803		15.000	EA	
2	Material			Lighting	<input type="checkbox"/>	39111800		15.000	EA	

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

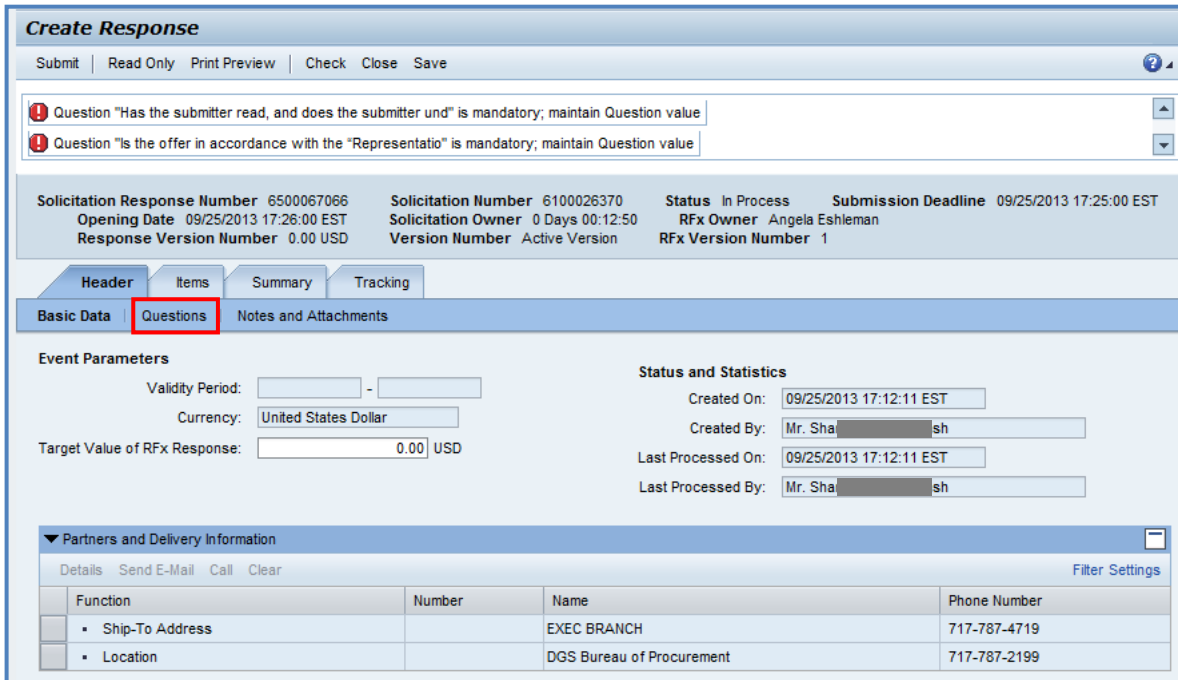
2. Select the **Create Response** button.



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.



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

The screenshot shows a window titled "Details for item Lighting" with tabs for Item Data, Questions, Notes and Attachments, Conditions, and Payment. The "Item Data" tab is active, showing a form with the following fields:

- Basic Data:** Identification (Product Category: 39111800 LIGHTING ACCESSORIES, Product ID, Description: Lighting), Currency: United States Dollar, Quantity: 15.000 EA, Price: 1294.97 (highlighted in a red box), SD Per: 1 EA, Net value: 0.00.
- Further Properties:** Supplier Product Number, Manufacturer Part Number, External Manufacturer.
- Status and Statistics:** (Empty)
- Partners and Delivery Information:** A table with columns: Function, Number, Name, Phone Number.

Function	Number	Name	Phone Number
Requester		Angela Eshleman	
Ship-To Address		EXEC BRANCH	717-787-4719
Location		DGS Bureau of Procurement	717-787-2199

10. Select the *Summary* tab.

11. Carefully review all of the information displayed. If necessary, make any corrections to the bid Response entries.

The screenshot shows the "Create Response" window with a toolbar (Submit, Read Only, Print Preview, Check, Close, Save) and a summary of response data. The "Summary" tab is selected and highlighted with a red box. The data includes:

- Solicitation Response Number: 6500067066
- Solicitation Number: 6100026370
- Status: In Process
- Submission Deadline: 09/25/2013 17:25:00 EST
- Opening Date: 09/25/2013 17:26:00 EST
- Solicitation Owner: 0 Days 00:07:10
- RFX Owner: Angela Eshleman
- Response Version Number: 0.00 USD
- Version Number: Active Version
- RFX Version Number: 1

Summary statistics:

- RFX Response Number: 6500067066
- Items with Response: 2 out of 2 items responded to
- Questions: 2 out of 2 questions answered (2 out of 2 mandatory)
- Notes: 3 notes added
- Attachments: 1 attachments added
- Conditions: 2 conditions added
- Total RFX Response Value: 32,838.15 USD

12. Select the **Check** button.

The screenshot shows the "Create Response" window with the "Check" button in the toolbar highlighted with a red circle. The summary statistics from the previous screenshot are visible below the toolbar.

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

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

Create Response

Submit Read Only Print Preview | Check Close Save

RFX response is complete and contains no errors

Solicitation Response Number 6500067066 Solicitation Number 6100026370 Status In Process
Opening Date 09/25/2013 17:26:00 EST Solicitation Owner 0 Days 00:07:10 RFX Owner Angela Es
Version Number Active Version RFX Version Number 1

Header Items Summary Tracking

RFX Response Number: 6500067066

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.

Create Response

Edit Print Preview Close Withdraw

RFX response 6500067066 submitted

Solicitation Response Number 6500067066 Solicitation Number 6100026370 Status Submitted
Opening Date 09/25/2013 17:26:00 EST Solicitation Owner 0 Days 00:05:41 RFX Owner Angela Esh
Version Number Active Version RFX Version Number 1

RFX%20Response[1].pdf - Adobe Reader

File Edit View Window Help

1 / 3 72%

Page 1 of 3

ORIGINAL QUOT - Invitation For Bid Emergency Generators and Lighting

QUOT Effective Date: 09/25/2013 Bid Number: 6500067066

Issuing Office:
Angela Eshleman
Forum Place 6th Floor
Walnut Street
Harrisburg PA 17105 US

Supplier Name/Address:

Please Return Quotation to:
Forum Place 6th Floor
Walnut Street
Harrisburg PA 17105 US

Type of Security furnished if required:
 Certified bank cashier's check
 Irrevocable letter of credit
 Certificate of deposit
 Other as specified by bid
 Bond - If annual bond:
What is the name of the principal on the bond?

Return Bid by:
Bid Ending Date:
09/25/2013
Bid Ending Time:
17:25:00

Please Deliver to:
BOP FOR PL
Forum Place 555 Walnut Street - 6th Fl
Harrisburg PA 17101 US

Procurement Contact:
Buyer: Angela Eshleman
Phone: 717-772-3098
Fax: 717-783-4241

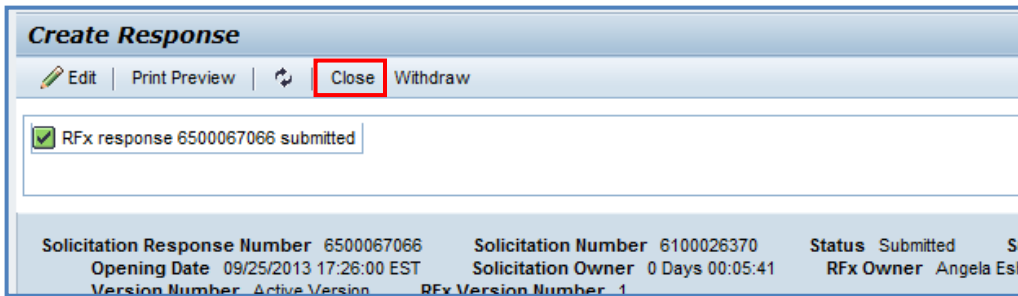
Expiration Date of Contract (if applicable)
Delivery Date:
See Items

This Invitation For Bids is comprised of: Part I, General Information; Part II, Bid Requirements; Part III, Criteria For Selection; Part IV, IFB Specifications; Part V, Contract Clauses; any documents attached to this Invitation For Bids or incorporated by reference; and any addenda issued by the Issuing Office prior to Bid Opening.

Supplier's Signature _____ Title _____
Printed Name _____ Date _____

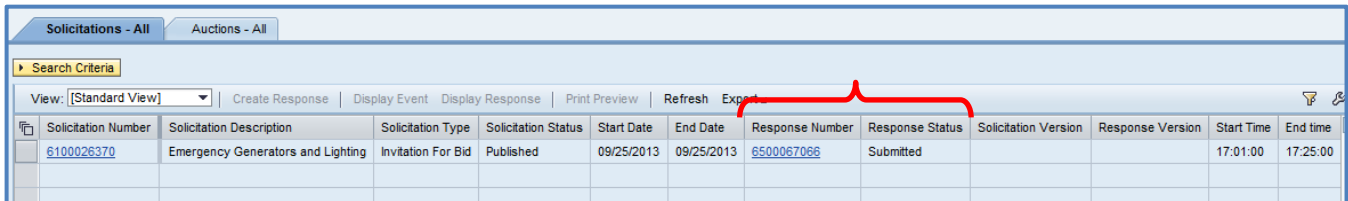
The Bidder has completed and submitted this Bid in accordance with the instructions and requirements and terms and conditions of the Invitation For Bid. The Bidder has attached documents that are required to be submitted with this Bid and those attachments are incorporated by reference and made a part of this Bid. The Bidder, intending to be legally bound hereby,

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



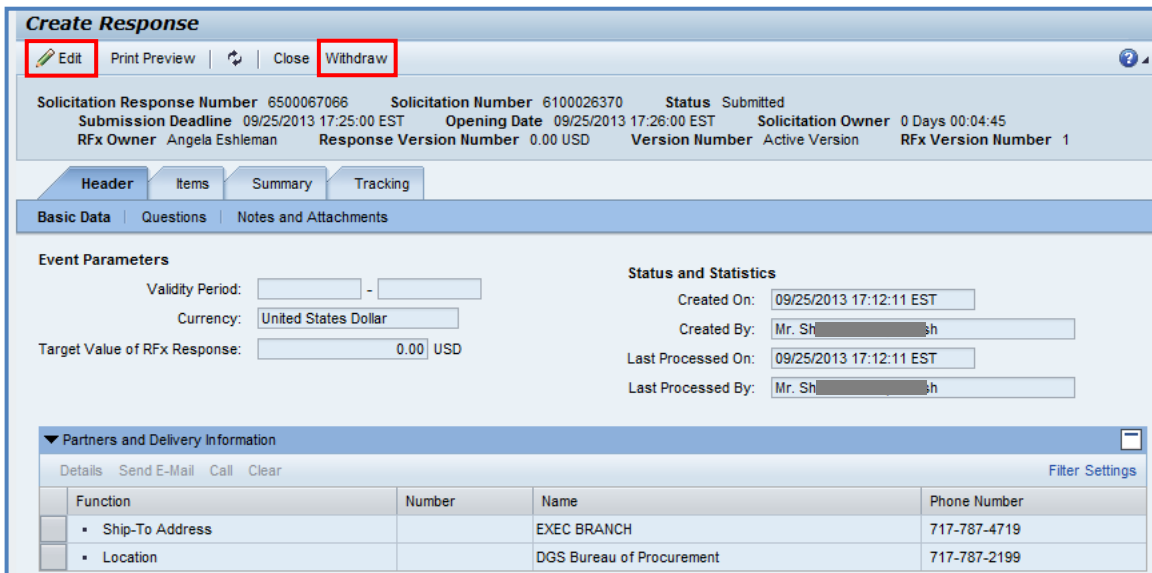
The POWL refreshes to display the submitted *Response Number* and *Response Status*.

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.

Line Number	Description	Item Type	Product ID	Product Category	Product Category Description	Required Quantity	Unit	Price	Currency	Price
1	Generators	Material	26131803	GENERATOR CONTROL/PR	15.0000	EA	894.24	USD		
2	Lighting	Material	39111800	LIGHTING ACCESSORIES	15.0000	EA	1250.00	USD		
3		Material					0.00	USD		

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

RFX Response Number: 6500067066
Items with Response: 2 out of 2 items responded to
Questions: 2 out of 2 questions answered (2 out of 2 mandatory)
Notes: 3 notes added
Attachments: 1 attachments added
Conditions: 2 conditions added
Total RFX Response Value: 32,163.60 USD

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

Submit | Read Only | Print Preview | **Check** | Close | Save

RFX response is complete and contains no errors

Solicitation Response Number 6500067066 Solicitation Number 6100026370 Status In Process
Submission Deadline 09/25/2013 17:25:00 EST Opening Date 09/25/2013 17:26:00 EST Solicitation

A message displays confirming submission of the updated Response.

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

The screenshot shows the 'Create Response' interface. At the top, there are buttons for 'Edit', 'Print Preview', 'Close' (highlighted with a red box), and 'Withdraw'. Below the buttons, a message box contains a green checkmark and the text 'RFX response 6500067066 submitted'. The main content area displays the following information:

Solicitation Response Number	6500067066	Solicitation Number	6100026370	Status	Submitted
Submission Deadline	09/25/2013 17:25:00 EST	Opening Date	09/25/2013 17:26:00 EST	Solicitation Owner	0 Days 00:02:16
RFX Owner	Angela Eshleman	Response Version Number	0.00 USD	Version Number	Active Version
				RFX Version Number	1

Below the information, there are tabs for 'Header', 'Items', 'Summary' (selected), and 'Tracking'. At the bottom, there is a text input field for 'RFX Response Number' with the value '6500067066'.

Withdraw/Re-Submit a RFX Response

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

The screenshot shows the 'Create Response' interface. At the top, there are buttons for 'Edit', 'Print Preview', 'Close', and 'Withdraw' (highlighted with a red box). Below the buttons, the main content area displays the following information:

Solicitation Response Number	6500067066	Solicitation Number	6100026370	Status	Submitted
Submission Deadline	09/25/2013 17:25:00 EST	Opening Date	09/25/2013 17:26:00 EST	Solicitation Owner	0 Days 00:02:16
RFX Owner	Angela Eshleman	Response Version Number	0.00 USD	Version Number	Active Version
				RFX Version Number	1

Below the information, there are tabs for 'Header', 'Items', 'Summary' (selected), and 'Tracking'. At the bottom, there is a text input field for 'RFX Response Number' with the value '6500067066' and a message box that says 'Items with Response: 2 out of 2 items responded to'.

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.

The screenshot shows the 'Create Response' interface. At the top, there are buttons for 'Edit', 'Print Preview', 'Check', 'Close', and 'Re-Submit' (highlighted with a red box). Below the buttons, a message box contains a green checkmark and the text 'RFX response 6500067066 (Emergency Generators and Lighting) withdrawn'. The main content area displays the following information:






Solicitation Response Number	6500067066	Solicitation Number	6100026370	Status	Withdrawn
Submission Deadline	09/25/2013 17:25:00 EST	Opening Date	09/25/2013 17:26:00 EST	Solicitation Owner	0 Days 00:01:59
RFX Owner	Angela Eshleman	Response Version Number	0.00 USD	Version Number	Active Version
				RFX Version Number	1

Below the information, there are tabs for 'Header', 'Items', 'Summary' (selected), and 'Tracking'. At the bottom, there is a text input field for 'RFX Response Number' with the value '6500067066' and a message box that says 'Items with Response: 2 out of 2 items responded to'.

A message displays confirming resubmission of the Response.

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

Create Response

 Edit |  Print Preview |   Close |  Withdraw


Rfx response 6500067066 (Emergency Generators and Lighting) resubmitted
 Rfx response is complete and contains no errors

Solicitation Response Number	6500067066	Solicitation Number	6100026370	Status	Submitted
Submission Deadline	09/25/2013 17:25:00 EST	Opening Date	09/25/2013 17:26:00 EST	Solicitation Owner	0 Days 00:01:41
Rfx Owner	Angela Eshleman	Response Version Number	0.00 USD	Version Number	Active Version
				Rfx Version Number	1

Header | Items | **Summary** | Tracking

Rfx Response Number:

Items with Response:

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