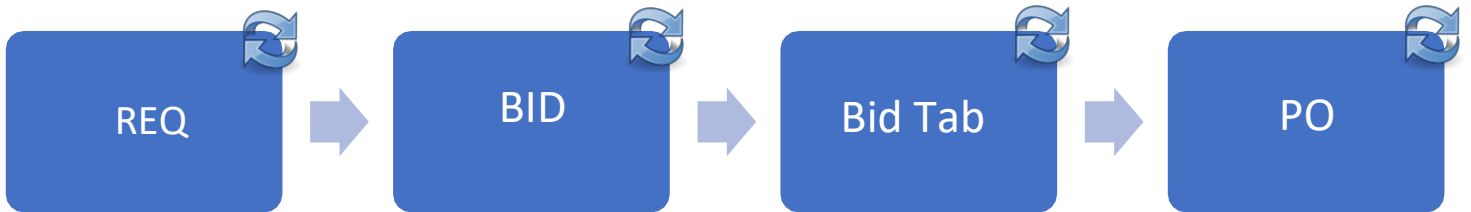


State Use


GOAL: Complete a Procurement in Accordance with State Use Requirements


WHO: BP Users




Stage	Tab	Task	Who
Requisition			
Create Req	Login		Agency
	<ul style="list-style-type: none"> ✓🔒 Documents ✓🔒 Requisitions ✓🔒 New 		Agency
	<ul style="list-style-type: none"> ✓🔒 General Tab 	<ul style="list-style-type: none"> ✓🔒 Short Description: SUP – Description of Items Being Procured. This should uniquely identify the procurement as this is a searchable field. ✓🔒 Requisition Type: Open Market ✓🔒 Type Code: Select the appropriate type code as this is a searchable field. See Appendix C ✓🔒 Special Procurement Type: State Use ✓🔒 Save and Continue 	Agency
	<ul style="list-style-type: none"> ✓🔒 Items Tab 	<p><u>Option 1: Add Open Market</u></p> <ul style="list-style-type: none"> ✓🔒 Item Type: Normal and Narrative ✓🔒 Description: Specification of the item that the Agency is procuring (This is a searchable field). 🖨 Complete Fields – include quantity and estimated cost ✓🔒 Save and Add New (Exit or Continue) <p><u>Option 2: Search Items:</u></p> <ul style="list-style-type: none"> ✓🔒 Advanced Search 🖨 Search Field Details ✓🔒 Find It ✓🔒 Select Items from Search Results ✓🔒 Select Add to Req (Exit or Continue) 	Agency

<p>Items Tab – Address Sub-Tab</p> <p><u>If using this Sub-Tab, do not update addresses on the Address tab on the Header.</u></p>	<ul style="list-style-type: none"> ☞ Go to the Items Tab – Address Sub-tab ☞ Select the check box in the ‘Select All’ column next to the item to change address (Ship/Bill to Address) <i>For DA Users:</i> <ul style="list-style-type: none"> ☞ Select desired address from dropdown menu ☞ Click Apply to Selected <i>For BP Users:</i> <ul style="list-style-type: none"> ☞ Click Q at the lower part of the screen next to the Ship-to Address or Bill-to address ☞ Enter Search Criteria for address desired ☞ Click Find It ☞ Select radio dial next to desired address ☞ Click Select ☞ To apply changes to only selected items - Click Apply to Selected ☞ Click Save & Continue to save changes and continue <i>*** To reset all addresses to the default from the Address Tab - Click Reset Selected to Header</i> 	
<ul style="list-style-type: none"> ☞ Vendor Tab 	<p><u>Can be Added at Either the Req or Bid</u></p> <ul style="list-style-type: none"> ☞ Lookup and Add State Use Vendor ☞ Find It ☞ Select Vendor ☞ Select Recommended ☞ Save & Exit 	
<ul style="list-style-type: none"> ☞ Address Tab <p><u>Use only if addresses were not specified on individual items.</u></p>	<ul style="list-style-type: none"> ☞ To change Ship-to or Bill-to-Address, click to search for new address Q ☞ Enter Search Criteria or enter nothing to receive all addresses ☞ Click Find It ☞ Select a new address ☞ Click Select to update address ☞ Click Save & Continue to save changes and continue ☞ To apply changes to Ship-to to all items on Requisition - Click Apply Ship-to to All Items ☞ To apply changes to Bill-to to all items on Requisition - Click Apply Bill-to to All Items ☞ <i>Important:</i> This will override any selections made at the address Sub-Tab for the Item Tab. 	Agency
<ul style="list-style-type: none"> ☞ Accounting 	<ul style="list-style-type: none"> ☞ Select Special Procurement Type: State Use ☞ Add any additional information ☞ Save & Continue 	Agency
<ul style="list-style-type: none"> ☞ Attachments 	<ul style="list-style-type: none"> ☞ Add All Files or Forms including State Use Request Letter, etc. ☞ Verify that Show Vendor is <u>NOT checked</u> for any file or form that should <u>not</u> be accessible to the public. ☞ Save & Continue 	Agency

	<input checked="" type="checkbox"/> Summary	<input style="vertical-align: top;" type="hand"/> Review all Data <input checked="" type="checkbox"/> Submit for Approval <input checked="" type="checkbox"/> Scroll to the Bottom of the Summary Tab to Add New Approver: <ul style="list-style-type: none"> ○ Order Sequence: The State Use Approver should be the last approver. Enter a Number Higher than the Last Approver ○ New Primary Approver: State Use Approver <input checked="" type="checkbox"/> Continue The REQ Will Route for Approvals NOTE: Prior to approval, the State Use Committee will review. The Committee Authorization Letter and Certificate of Assurance will be attached.	Agency
Conduct Approvals 			
Process Bid	<input checked="" type="checkbox"/> Summary Tab	Once All Approvals Have Been Received <input checked="" type="checkbox"/> Convert to Bid <input checked="" type="checkbox"/> Bid Document Hyperlink	Agency
BID			
BID	<input checked="" type="checkbox"/> General Tab	<input checked="" type="checkbox"/> Type Code: 50 – State Use <input checked="" type="checkbox"/> Allow Electronic Response: Uncheck <input checked="" type="checkbox"/> Bid Available Date: Select <input checked="" type="checkbox"/> Bid Opening Date: A Minimum of 14 Days <input checked="" type="checkbox"/> Purchase Method: Open Market or Blanket as Appropriate <input type="checkbox"/> Info Contact: Complete <input checked="" type="checkbox"/> Enable Open Enrollment: Select <input type="checkbox"/> Bulletin Description: Enter <input type="checkbox"/> SPO Name: Enter <input checked="" type="checkbox"/> Special Procurement Rationale: State Use <input checked="" type="checkbox"/> Has the approved State Use Request Form and Authorization Letter been Attached: Yes <input checked="" type="checkbox"/> Is this subject to Small Business Set-Aside?: No	Agency
	<input checked="" type="checkbox"/> Items Tab	<input checked="" type="checkbox"/> Review and revise as necessary	Agency
	<input checked="" type="checkbox"/> Address	<input style="vertical-align: top;" type="hand"/> Review and revise as necessary	Agency
	<input checked="" type="checkbox"/> Accounting	<input style="vertical-align: top;" type="hand"/> Review and revise as necessary	Agency
	<input checked="" type="checkbox"/> Attachments	<input checked="" type="checkbox"/> Complete and Attach the Notice of Award <ul style="list-style-type: none"> ○ Show to Vendor: Uncheck <input checked="" type="checkbox"/> Save and Continue	Agency
	<input checked="" type="checkbox"/> Notes	<input checked="" type="checkbox"/> Add as necessary	Agency
	<input checked="" type="checkbox"/> Bidders Tab	<input checked="" type="checkbox"/> Lookup and Add Vendors for all Commodity Codes and/or <input checked="" type="checkbox"/> Lookup and Add Vendors Based on Search Fields <input checked="" type="checkbox"/> Find It <input checked="" type="checkbox"/> Select vendors <input checked="" type="checkbox"/> Save & Continue Select <input checked="" type="checkbox"/> Unrestricted bid, all vendors can view and respond <input checked="" type="checkbox"/> Hide Bid Holder List on Vendor Side <input checked="" type="checkbox"/> Save & Continue	Agency


	<ul style="list-style-type: none"> ✓ Amendments 	<p>If needed to update the bid</p> <ul style="list-style-type: none"> ✓ Create Bid Amendment ✓ Enter changes to Tabs and Save and Continue ✓ Attach Any Required Documents and Save and Continue ✓ Comment Box: Leave blank if you do not wish to send the Amendment to vendors. Add Comment if You Will Send to Vendors ✓ Save & Continue ✓ Return to Bid ✓ Set a Reminder to the SPO to Post the Amendment ✓ Click Amendment number ✓ Verify Show to Vendor Option ✓ Apply Bid Amendment 	Agency/SPO
	<ul style="list-style-type: none"> ✓ Reminders 	<ul style="list-style-type: none"> ✓ Add as necessary 	Agency
	<ul style="list-style-type: none"> ✓ Summary 	<ul style="list-style-type: none"> ✎ Review all data ✓ Submit for Approval ✓ Continue 	Agency
Conduct Approvals 			
Send Bid	<ul style="list-style-type: none"> ✓ Summary 	<ul style="list-style-type: none"> ✓ Update Bid Dates as Necessary ✓ Select Change Bid status to 'Sent' and Notify Vendors ✓ Send Bid ✓ Click OK to Notify Vendors 	Agency
BID Tab			
Create Quote(s)	<ul style="list-style-type: none"> ✓ Summary Tab 	<ul style="list-style-type: none"> ✓ Access Bid ✓ Open Bid ✓ Bid Tab ✓ Create New Quote 	Agency
	<ul style="list-style-type: none"> ✓ General Tab 	<ul style="list-style-type: none"> 📄 Vendor Name ✓ Received Date ✓ Are you registered and active in the IPG? ✓ Did you attach Forms B? 	Agency
	<ul style="list-style-type: none"> ✓ Items Tab 	<ul style="list-style-type: none"> ✓ Enter Price ✓ Save & Continue 	Agency
	<ul style="list-style-type: none"> ✓ Subcontractors Tab 	<ul style="list-style-type: none"> 📄 Enter all Subcontractors Over \$50,000 📄 Enter BEP Subcontractors if applicable 	Agency
	<ul style="list-style-type: none"> ✓ Terms & Conditions Tab 	<ul style="list-style-type: none"> ✎ Review Terms and Conditions ✓ Enter Response 	Agency
	<ul style="list-style-type: none"> ✓ Attachments Tab 	<ul style="list-style-type: none"> ✓ Add All Files or Forms including Quote Documents, Communications, etc. ✓ Apply ✓ Save & Continue 	Agency







	<input checked="" type="checkbox"/> Evaluations Tab <input checked="" type="checkbox"/> Preference Tab <input checked="" type="checkbox"/> Reminders Tab <input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> N/A <input checked="" type="checkbox"/> N/A <input checked="" type="checkbox"/> Set as Needed <input checked="" type="checkbox"/> Submit Quote <input checked="" type="checkbox"/> Back to Bid	Agency Agency Agency Agency
Tabulate Bids	<input checked="" type="checkbox"/> Bid Summary Tab <input checked="" type="checkbox"/> All Tabs	<input checked="" type="checkbox"/> Bid Tab <input checked="" type="checkbox"/> Quotes to be Considered <input checked="" type="checkbox"/> Save & Continue <input checked="" type="checkbox"/> Review for Responsiveness	Agency / BEP/ SPO Agency
Award Bid	<input checked="" type="checkbox"/> Items Tab <input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> Select Vendor for Award <input checked="" type="checkbox"/> Select Award All <input checked="" type="checkbox"/> Save & Continue Review Data <input checked="" type="checkbox"/> Submit for Approval	Agency Agency
Conduct Approvals 			
PPB Reminder	<input checked="" type="checkbox"/> Reminder Tab <input checked="" type="checkbox"/> Reminder Tab	<input checked="" type="checkbox"/> Due Date: 14 Days <input checked="" type="checkbox"/> Comment: Waiver Request <input checked="" type="checkbox"/> Remind Whom: PPB Waiver Request <input checked="" type="checkbox"/> Days Prior to Remind: 13 Days <input checked="" type="checkbox"/> Send Email: Check <input checked="" type="checkbox"/> Save & Continue <input checked="" type="checkbox"/> Receive Reminder Response	SPO SPO
Convert to PO	<input checked="" type="checkbox"/> Documents	Once All Approvals Have Been Received, including the PPB <input checked="" type="checkbox"/> Documents <input checked="" type="checkbox"/> Bids <input checked="" type="checkbox"/> Ready for Purchasing <input checked="" type="checkbox"/> Bid # Link	Agency
	<input checked="" type="checkbox"/> Bid Tab <input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> Create PO <input checked="" type="checkbox"/> Select PO Creation Options	Agency

	<input type="checkbox"/> Summary Tab	<input type="checkbox"/> Convert to PO <u>Select ONE of the Following:</u> 1. Single PO Using Header Recommended Vendor OR 2. Single PO Using Selected Reference Vendor OR 3. Single PO Using Item Recommended Vendor OR 4. Choose Vendors <input type="checkbox"/> Include Vendor Informal Quote Attachments <input type="checkbox"/> Convert to PO <input type="checkbox"/> OK	Agency
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Purchase Order

Process PO	<input type="checkbox"/> Summary Tab	<input type="checkbox"/> New PO Hyperlink to View PO	Agency
	<input type="checkbox"/> General Tab	Complete Required Fields, including: <input type="checkbox"/> Type Code: State Use <input type="checkbox"/> Publication Date: Date the Bid was Published <input type="checkbox"/> Actual Contract Begin Date <input type="checkbox"/> Actual Contract End Date <input type="checkbox"/> Renewal information (if applicable) <input type="checkbox"/> Fiscal Year of Obligation: Choose the fiscal year in which the contract will start <input type="checkbox"/> Master Contract: Yes or No <input type="checkbox"/> PO TYPE: Open Market <input type="checkbox"/> Blanket (SAP Only - when syncing with SAP) <input type="checkbox"/> Date Contract Executed: Last Signature <input type="checkbox"/> Save & Continue	Agency
	<input type="checkbox"/> Items Tab	<input type="checkbox"/> Update as Needed	
	<input type="checkbox"/> Control Tab	Select: <input type="checkbox"/> Cooperative Purchasing Allowed: Check <input type="checkbox"/> Add New: Search and Add Agenc(ies)/Departments allowed to purchase from contract <input type="checkbox"/> Contract Begin Date <input type="checkbox"/> Contract End Date <input type="checkbox"/> Dollar Limit <input type="checkbox"/> Save and Continue	Agency
	<input type="checkbox"/> Attachment Tab	Add any attachments – See Appendix B <input type="checkbox"/> Executed Contract, if available	Agency
	<input type="checkbox"/> Summary Tab	<input type="checkbox"/> Update Any Red Errors <input type="checkbox"/> Submit for Approval <input type="checkbox"/> Continue	Agency

Conduct Approvals 

	 Documents	After All Approvals Have Been Received  POs  Ready to Send  PO # Hyperlink  Apply Notification Action to Selected  OK	Agency
Create Change Orders		See Change Order Manual for Instructions on Attaching the Executed Contract if not Completed in the Previous Step	Agency