



## INSTRUCTIONS FOR RUNNING A SOLICITATION LISTING

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### OBJECTIVE

The **Solicitation Listing** is a standard report in the Georgia Procurement Registry (GPR) that allows the user to download solicitations from the GPR to an Excel spreadsheet. This data will be used to populate the **GPR Workbook** self-audit tool.

### PRELIMINARY INFORMATION

If you have any difficulty retrieving these reports or following any of the steps given below, please contact [processimprovement@doas.ga.gov](mailto:processimprovement@doas.ga.gov) for additional assistance. The Process Improvement Team is ready to serve to ensure you successfully obtain all the necessary data from the GPR.

### *Notes on Report Criteria*

To better clarify the required criteria on the Solicitation Listing page, please note that in Step #6, you will be prompted to select a response type based on your solicitation posting system.

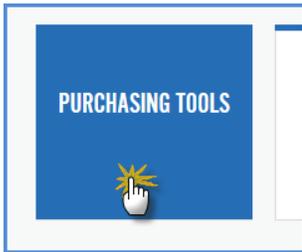
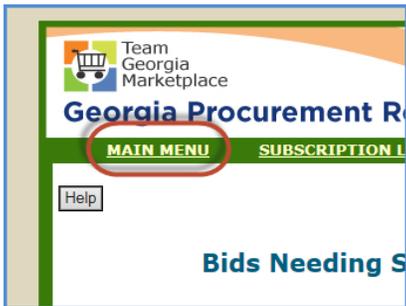
- Paper Response - must be chosen for Sole Source and Consortia Notices that were posted directly to the GPR.
- TGM(PS) - must be chosen if the Entity has implemented TGM PeopleSoft for posting RFQs and RFPs.
- eSource(ES) – must be chosen if the entity uses eSource for posting RFQs and RFPs.

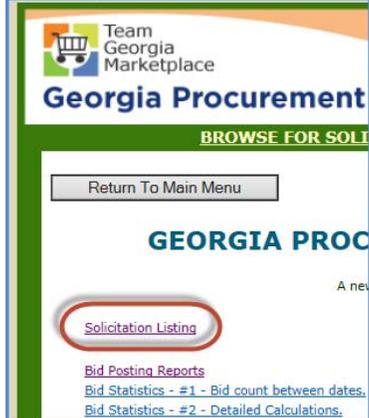
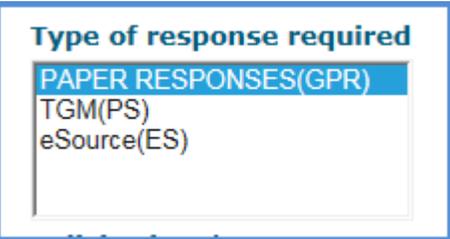
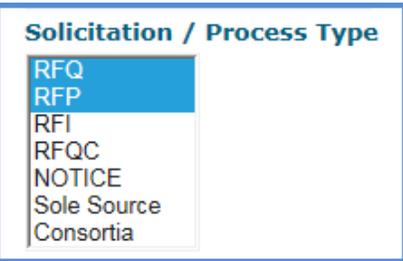
If either “TGM” or “eSource” criteria is selected as the **Type of Response Required**, more than one process type can be chosen when the Shift Key is held down before selecting the options available (RFQs + RFPs). However, Sole Source or Consortia *cannot* be added with other process types. Sole Source and/or Consortia must be selected as the process type when the GPR **Paper Response** criteria is chosen.

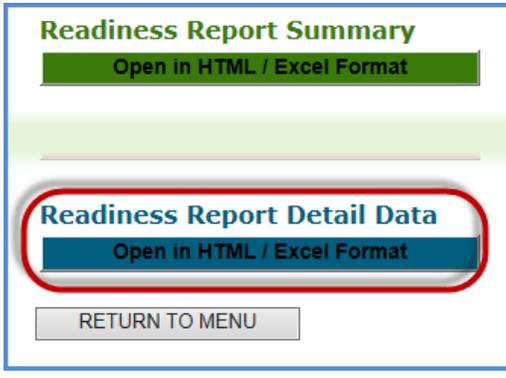
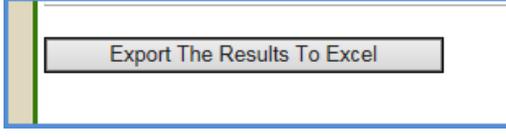
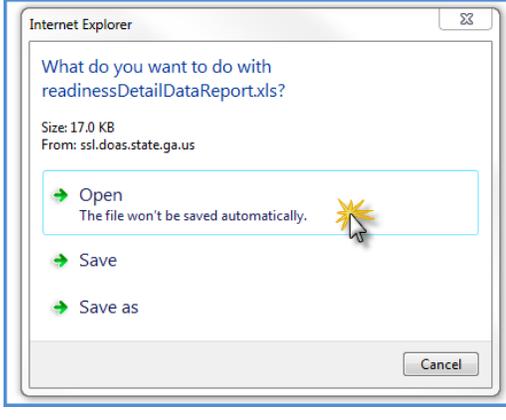
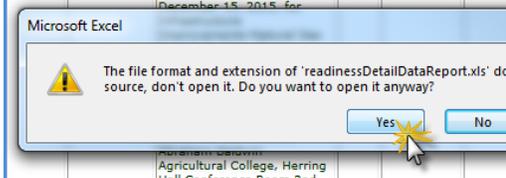
It is highly recommended that you first run an RFQ and RFP report with the following criteria:

- Select TGM or eSource, depending on which system your entity uses to post sourcing events.
- Select both RFP and RFQ as the process types.
- Once all the previous steps have been completed, you can export the results to Excel. Rename the tab contained in this Excel file as **RFP + RFQ**. You can now save this file as your GPR Workbook.

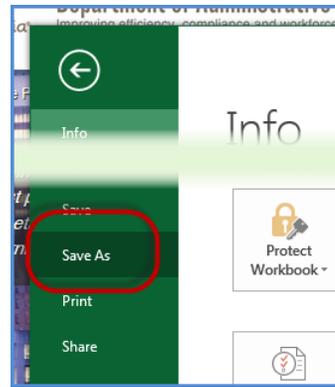
## STEPS TO RUN THE REPORT

<p>1. <b>Important Note:</b> In order to run this report, you MUST have login access to the GPR. To log in, go to the State Purchasing Division web site at <a href="http://doas.ga.gov/state-purchasing">http://doas.ga.gov/state-purchasing</a>.</p> <p>2. Scroll to the bottom of the page and click on the <b>Purchasing Tools</b> button in the “Areas of Focus”.</p>	
<p>3. Scroll to the bottom of the page and click on the <b>Process Improvement Tools</b> button in the “Areas of Focus”.</p>	
<p>4. Scroll to the bottom of the screen and click on the <b>Georgia Procurement Registry Login</b> button in the “Areas of Focus” at the bottom of the page.</p>	
<p>5. The GPR login page will display. Enter your GPR User ID and Password.</p>	
<p>6. Click on the link to the <b>Main Menu</b>.</p>	

<p>7. Scroll midway down the page and locate the <b>Reports</b> section. Click on <b>Reports Menu</b>.</p>	
<p>8. Click on the link for the <b>Solicitation Listing</b>.</p>	
<p>9. The <b>Report Criteria</b> page will display. Choose one type of response. See Additional Information above for more detail.</p> <ul style="list-style-type: none"> <li>• Paper Response (GPR): Select for Sole Source</li> <li>• TGM (PS): Select for RFP or RFQ</li> <li>• eSource (ES): Select for RFP or RFQ</li> </ul>	
<p>10. Select the Process Type you want to run.</p> <ul style="list-style-type: none"> <li>• To select multiple types (e.g. RFQ and RFP) hold down the Shift key and clicking on each.</li> <li>• You must run a single report for Sole Source types.</li> </ul>	
<p>11. Use the calendars to select the Event Posting Date Range (“beginning” and “ending” dates for the period you want to review).</p> <p>12. In the Government Type drop-down list, ensure <b>State Government</b> is selected.</p> <p>13. Your Entity name will appear below.</p>	

<p>14. At the bottom of the Solicitation Listing page, you will find Report Type options. Click on the blue <b>Solicitation Listing Detail Data</b> option to view the report on screen. You may also export to Excel.</p>	
<p>15. The screen will display the report in grids</p>	
<p>16. Scroll to the bottom of the page and locate the <b>Export The Results To Excel</b> button.</p>	
<p>17. The screen will display three options. Click on the top option, <b>Open – The file won't be saved automatically.</b></p>	
<p>18. The screen will display a warning that the file format and extension of the report don't match. Click <b>Yes</b> to open the file anyway.</p>	

19. The file will open in Excel. Save the file as GPR Workbook with your Entity name and period of review (e.g. GPR\_Workbook\_DOAS\_FY2016.xlsx).



20. To run additional reports, click on the **Return for New Filter Options** button in the top left-hand corner. This button allows you to return to the Solicitation Listing criteria page to make your selection to run the Sole Source report and export it to Excel. The Sole Source data should then be copied to a new tab in the GPR workbook. Label the tab **Sole Source**. This will allow all of your GPR events to be contained in one Excel file and saved as your GPR Workbook.

