Electronic Request for Qualified Contractors (eRFQC) Process
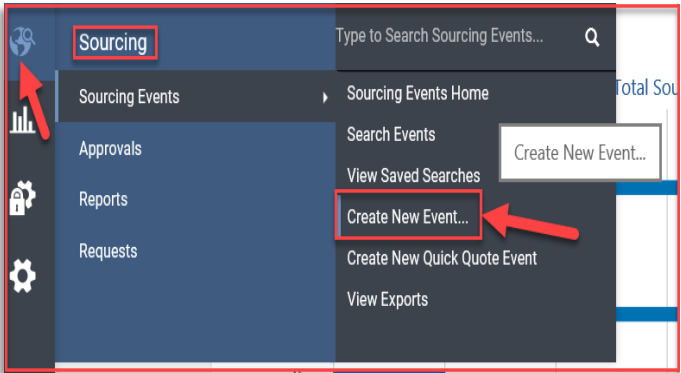
Jaggaer Sourcing Director for the University System of Georgia

Create Draft eRFQC	

1. Access Website to Sign In
   a. Open up a web browser
   b. Go to https://solutions.sciquest.com/apps/Router/Login?OrgName=Georgia	

2. Enter Logon Credentials
   a. Enter User Name
   b. Enter Password
   c. Select "SIGN IN"	

3. Access the Sourcing Menu
 	
   a. Navigate to Sourcing Menu Icon
   b. Select "Sourcing Events"
   c. Select "Create New Event…"	

Create Draft eRFQC	

4. eRFQC Title and State Entity Name
    a.   In the "Event Title" Field, **include the State Entity Abbreviation** plus Event Title Name (e.g. MGA Prequalification for Repair Services)
    b.   Select/Confirm your State Entity's name
    c.   Click "Next"
 	
Tip: including State Entity Name in Event Title will assist in Sourcing Director event list (as there is no column to display state entity's name).
	Create Sourcing Event
	
	About the Sourcing Event *(Step 1 of 2)*
	Event Title * MGA Prequalification for Repair Ser...
	Entity * Middle Georgia State University
	
	* Required Next ›

5. Select Event Type and Template
    a.   In the "Event Type" Field, click the magnifying glass
    b.   Select "Request for Quote"
    c.   **RECOMMENDED:** Use the eRFQ template to simplify event creation
        i.   Click the magnifying glass for the "Create from Template" field
        ii.   Click the "Select" button for eRFQ template or Skip step c if you want to create your own event and upload completed eRFQ template under Buyer attachments.
          OR
    d.   Skip step c if you want to create your own event and upload completed eRFQ template ([SPD-SP020 eRFQC Template](#)) under Buyer attachments.
    e.   Select "Create Sourcing Event"
	Create Sourcing Event
	
	About the Sourcing Event *(Step 2 of 2)*
	Event Type * Event Type
	Create from Template Template Name
	
	Sourcing Event Type
	
	Name
	Request for Information Select
	Request for Proposal Select
	Request for Qualified Contractors Select
	Request for Quote Select
	
	Selected Value
	No Value Selected
	
	     Close
	
	Create Sourcing Event
	
	About the Sourcing Event *(Step 2 of 2)*
	Event Type * Request for Qualified Contractors
	Create from Template Template Name
	
	* Required ‹ Previous Create Sourcing Event
	
	Sourcing Event Templates
	
	Name
	eRFQC Template Select

Create Draft eRFQC	

6. Confirmation of Draft Event a. Verify that draft Event has been successfully created	
Once the event draft is created, you'll complete a setup wizard to assist with completion and submission of your event. At the bottom of each page of the wizard, there is a button to save progress and to move on to the next page. You can also navigate through the various pages of the setup wizard by selecting the page desired on the left side of the screen. There is also a Tools option at the bottom of the setup wizard. Continue event set-up by completing steps below.	

7. **Settings and Content**
    a. View Event Title and Edit as needed
    b. Note that Event Number is automatically assigned by the system
    c. The "Stage Title" field should be left blank during set-up
 	
NOTE: The Event Type and Entity cannot be edited once the draft is created. If there was an error in selecting the Event Type or Entity, then the draft event should be deleted and a new drafted started.	

8. **Select First NIGP Code**
    a. Click the "Edit" button for Reporting NIGP Code
    b. Search for the NIGP code by number or text description and click the magnifying glass icon
    c. View the search results and click "Select" for the desired code
    d. Confirm the desired code appears or select "edit" to modify
 	
❗ **IMPORTANT:** Do NOT select an NIGP code ending in "00". No suppliers are allowed to register with NIGP codes ending in "00" so this would prevent email notifications being sent to registered suppliers.

9. **Select Additional NIGP Codes**
   a. To add more than one NIGP code (RECOMMENDED), select the "edit" button beside Additional NIGP codes
   b. Repeat the steps above to search
   c. Click the box to add a "check" for each desired additional code
   d. Click "Done"
   e. Click "Save Progress" at the bottom of the page
   f. To view codes select, click "xx Values Selected" to view additional codes

TIP #1: You must first select "Save Progress" before you are able to click and view the codes that are selected for the Additional NIGP Codes line.

TIP #2: To remove an NIGP Code selected in error, click Edit and then search for the specific NIGP code to be removed. From the search results, select "Remove" (for the reporting NIGP code line) or deselect the checkbox (for the additional NIGP code line).

10. **Payment**
    a. Currency will always default to US Dollar
    b. Insert the estimated purchase price for your event. NOTE: The system will use this amount to calculate "savings" (if any) based on final award amount.

* Also re-enter the same amount under Additional Event Details field. This is used for delegated purchasing authority (DPA) workflow.

Complete Event Set-Up	

11. Bid and Evaluation
  a. **Sealed bid** - **will always default to Yes.**
  b. **Use Panel Questionnaire – will always default to Yes.** Buyer may use this feature if the eRFQC includes a scored technical component.
  c. **Auto Score** – allows buyer to set automatic points per question. **Not generally applicable to RFQCs. Recommend sent to "No."**
  d. **Allow Split Item Quantity in Evaluations** – permits awarding items to multiple Suppliers. **Will always default to Yes.**
	
	The event creator manages which users can see supplier prices. If you believe that you should be able to see prices on the sourcing event, then contact the event creator for further assistance. Select any additional applicable options.

12. Display and Communication
  a. VISIBLE TO PUBLIC will always default to Yes
  b. Enter brief description to be displayed on Jaggaer Sourcing Director site. **RECOMMENDED:** include the state entity's full name in the description.
  c. Restrict Buyer Notification will always default to *Yes* so that only the issuing officer will receive event-related notifications. If you want additional users to receive notifications, those can be added in User Tab under Notifications Recipients.	

13. Posting Dates
  a. Verify Time Zone is set to "Eastern Standard Time"
  b. Identify "Open Date" (must be today or in the future)
      i. Click Calendar to Select Date
      ii. Click Clock to Select Time
  c. Identify "Close Date"
      i. Click Calendar to Select Date
      ii. Click Clock to Select Time
  d. **Sealed Bid Open Date** – Defaults to "Same as Close Date" which allows Issuing Officer to access bids as soon as the event closes. **Do not change.**
  e. **Show Sealed Bid Open Date to Suppliers** – Defaults to "Show Sealed Bid Open Date to Supplier". **Do not change.**	

f. Select "Save Progress"

IMPORTANT: VERIFY THAT YOU HAVE NOT SELECTED A STATE HOLIDAY, WEEKEND OR OTHER DATE WHEN YOU WILL BE OUT OF THE OFFICE. ENSURE CLOSING TIME IS BETWEEN THE FOLLOWING TIMEFRAME (10AM – 2PM) TO ENSURE SUPPLIER'S ACCESS TO HELPDESK SUPPORT.

TIP #1: Once the date is selected, the time defaults to 12:00 AM. Be sure to revise the time to normal busines hours.

TIP #2: Click the 💬 symbol for Close Date to view the posting guidelines based on dollar value.

TIP #3: *Wait to finalize the event open and close dates* until you are ready to finalize and post the Event. This prevents posting with "old" dates that are invalid or failing to observe the minimum posting period.

The Close Date is the date in which the bidding period ends and Suppliers can no longer submit a response.

Public Posting Guidelines

If the Estimated Contract Value is...	Then the Posting Period is...
$0 - $24,999.99	No Posting Required
$25,000 - $99,999.99	Minimum of 3 Business Days
$100,000 - $249,999.99	Minimum of 5 Business Days
$250,000 and above	Minimum of 15 Business Days
Construction/ Public Works Contracts	Minimum of 30 Calendar Days

14. Set Q&A Deadline
  a. Identify Deadline for Suppliers to submit questions to the issuing officer
      i.   Click Calendar to Select Date
      ii. Click Clock to Select Time
  b. Select "Save Progress"
  c. Select "Next"

TIP: The deadline for submitting questions should allow enough time for the issuing officer to review and post answers prior to the closing date. For that reason, **do not select** the "Same as Close Date" box for the Q&A deadline as this does not allow time for responses.

Complete Event Set-Up	

15. Additional Event Details
    a. Re-enter Estimated Dollar Value (Put in the same amount as in Payment section above)
    b. Enter Fiscal Year Event will be Awarded (e.g., 2020, 2021, etc.)
    c. Select appropriate Purchasing Type from drop-down list
    d. Select Category Type from drop-down list
    e. OPTIONAL: Enter state entity's website address in the URL field. (Optional)
	Additional Event Details
	
	Dollar Estimate (Re-Enter Estimated Dollar value) ★ ⓘ Field Validation
	
	Fiscal Year
	
	Purchasing Type ★
	
	Category Type ★
	
	URL

16. Enter Offerors' Conference Information
    a. Indicate whether an offerors'/bidders' conference will be conducted by the State Entity.
        i. Choose "N/A" if no conference will be held
           OR
        ii. If conference will be offered, select whether supplier attendance is "Optional" or "Mandatory". Continue to identify location and additional comments related to conference.
    b. Select "Save Progress"
    c. Select "Next"
NOTE: This information is transmitted and displayed on the Georgia Procurement as part of the public notice. The issuing officer must also include offerors' conference information by publishing **SPD-SPR010 Bidders/Offerors' Conference Announcement** in the Buyers' Attachment section.
	Offerors' Conference Information
	
	Offerors Conference ★ ⓘ — Mandatory
	Offerors Conference Date — 06/04/2020 📅
	    mm/dd/yyyy
	Offerors Conference Time (HH:MM AM/PM) — 10.00 am
	Offerors Conference Location — Offerors Conference Location
	    1972 characters remaining
	Offerors Conference Street — Offerors Conference street
	    1974 characters remaining
	Offerors Conference City — City
	Offerors Conference State — GA
	Offerors Conference Zip — 30033
	Offerors Conference Comments — Offerors Conference Comments
	    1972 characters remaining

Complete Event Set-Up	

17. Review/Assign Users
    a. Verify Event Creator and Owner information is correct
    b. Verify contact information that will be displayed to suppliers is correct
    c. OPTIONAL: assign additional stakeholders (if any) that will have access to view the event and responses
        i. Click Edit Users
        ii. Search by username, email address
        iii. Select Individual
        iv. Select "Save Changes"
    d. Select "Save Progress"
    e. Select "Next"
 	
NOTE: only individuals with Jaggaer accounts will be visible; contact the CUPO to add users.	

18. Description
    a. If the eRFQC template was selected, then the tool prepopulates standard text. Review "Instructions to Issuing Officer", edit text, and then delete notes
    b. Otherwise, please add text
    c. <u>Please be sure to include state entity's full name in the description</u>
 	
TIP: To remove yellow highlighting, select the text and then click the "Paint Bucket" icon to change the background color. Select top left box for "white" or no background color
 	
NOTE: this description will be displayed to suppliers on the Georgia Procurement Registry	

19. Stage Description
    a. This is not applicable to RFQCs. <u>This should be left blank</u>.
    b. Select "Save Progress"
    c. Select "Next"	

20. Review and Edit Event Prerequisites a. If the eRFQC template was selected, then the tool prepopulates standard Event Prerequisites	

b. To add additional prerequisites, click "Add Prerequisite" and select from the following:
   i. "Add New Prerequisite" (to add custom) OR
   ii. Select "Add from Library" (to select standard prerequisite)

Note: Suppliers must acknowledge/respond to prerequisites (either before accessing the event or before submitting an electronic response depending on how the prerequisite is configured).

The lock symbol indicates the supplier must acknowledge prior to viewing the event.

The star symbol indicates the supplier must acknowledge prior to submitting an electronic response

🔒 Required to View Event

★ Required to Enter Bid

Add Event Prerequisites (CONT.)
   i. **Add New Prerequisite (to add custom)**
      a. Select "Add New Prerequisite"
      b. In the "Instructions to supplier", add a title to describe the requirement
      c. For "prerequisite content", select to enter text directly or attach a file with additional information
      d. For "Type", select whether the prerequisite is "optional," "required to view event" or "required to enter bid."
      e. Edit "Certification Text" as desired
      f. If the supplier is required to include an attachment, select the checkbox
      g. Use the Display Order to change position of new prerequisite as it will appear with any other prerequisites added
      h. Select "Save Changes"
      i. Repeat the steps above to add additional custom prerequisites

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Add Event Prerequisites (CONT.)
   i. **Add Prerequisite from Library (standard)**
      a. Select "Add from Library"
      b. Select the magnifying glass
      c. Click "Select" for GA Library
      d. Click "checkbox" for each desired prerequisite

e. Click "Add Selected Prerequisites" f. Confirm desired prerequisites appear g. Click the "Actions" drop-down to edit or delete h. Repeat the steps above to add additional prerequisites i. Click "Save Progress" j. Click "Next"	

21. Add Buyer Attachments
- a. Select "Add Attachment" and select from:
  - i. Add New Attachment
    OR
  - ii. Add from Library
- b. For **New Attachments**, please
  - i. Create a Display Name (which will appear to the supplier)
  - ii. Click "Select File" to search for file, browse and click the file, then click open
  - iii. Confirm desired file Appears
  - iv. Add any additional comments for the file
  - v. Click "Save Changes"

vi. Repeat steps above for each additional file c. On main "Buyer Attachments" page, select "Actions" button to edit, delete or modify the attachments d. Click "Save Changes" e. Click "Next" **TIP:** If you are using the eRFQC template within Jaggaer Sourcing Director, there is no need to separately attach SPD-SP020 State Entity eRFQC Template.	
22. Supplier Attachments a. Observe that all event types are set up to allow suppliers to upload attachments b. Click "Next"	

23. Event Questions
a. **RECOMMENDED:** To allow suppliers to answer questions directly within the Sourcing Tool, add event questions.
b. When using the template, the tool will prepopulate standard questions.
c. To add event questions, you can use any of the following options:
  i. Select "Add New Question" to enter a custom question
  ii. Select "Add from Library" for standard questions	

iii. Select "Import from File" to upload previously prepared questions IMPORTANT: you must use system template.

iv. NOTE: If the eRFQC template was selected during event set-up, the buyer will have existing event questions pre-populated. To maintain the existing questions and add additional within the template, select "Export Questions" to obtain system template while also maintaining existing page structure and pre-populated questions.

d. Questions are organized into "Pages" and, on each Page, into "Groups".

i. From the main Question page, select "Add Question Page". Or select "Add Question Group" to add a new group on an existing page.

ii. To add a new question to a particular group, select the "Add Question" button for the identified group.

e. Select "Save Progress"

f. Select "Next"

NOTE: Use of Event Questions is optional but **strongly recommended**. As an alternative, questions can be uploaded as a file attachment in the Buyer Attachments section.

TIP: Review the *Import Event Questions Quick Reference Guide* for additional instructions.

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24. Add Additional Item Fields (OPTIONAL)
NOTE: Not generally applicable to eRFQCs.

a. Additional Item Fields allows the Buyer to capture supplier data at the cost line item level. These questions are directly related to the product (or service) line item, different from the event Questions section, which are not line item specific. For example, for each cost line item, the buyer may include item fields to capture product information such as the Manufacturer's name, or whether the product is made in the USA.

b. Select "Create Additional Field" and choose:
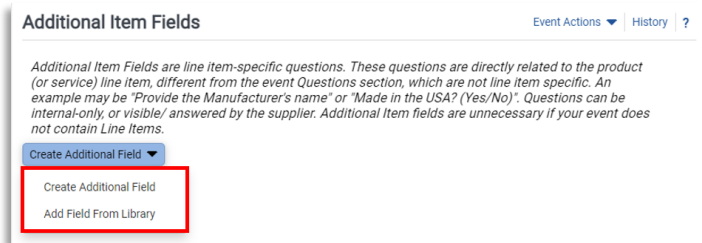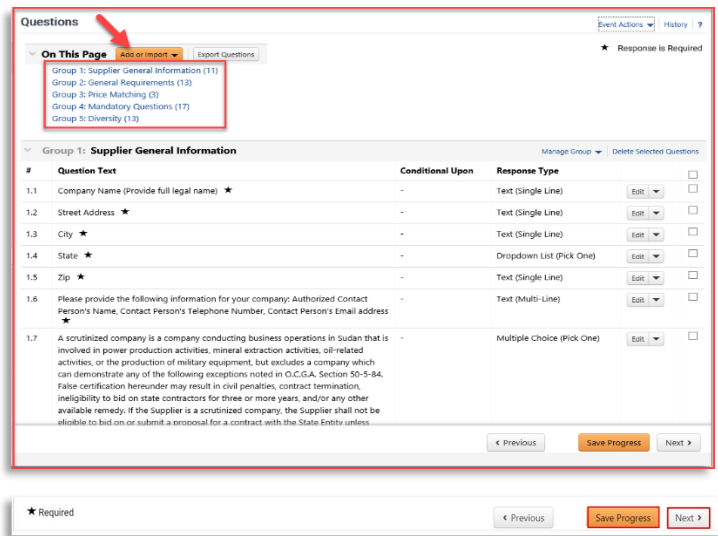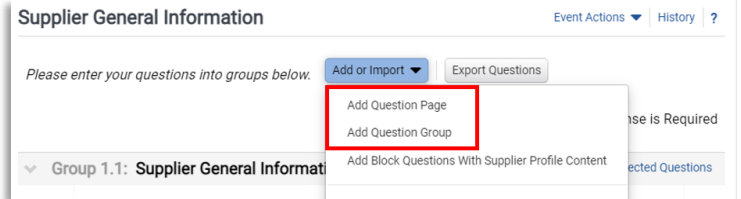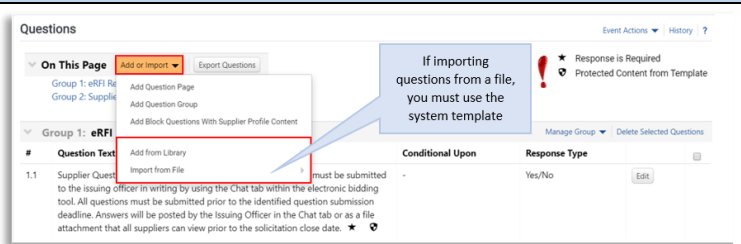
i. "Create Additional Field" (to create custom question)

   OR

ii. "Add Field From Library" (to browse and select standard content)

c. If creating custom additional field, then complete the following steps:

   i. Enter Name for field

   ii. Integration Id may be left blank

   iii. Add text in Description as needed to assist suppliers in responding

   iv. For "Applicable To", choose whether the additional field is applicable to product line items, service line items or both.

   v. For "Supplier Can Respond", be sure to select "Yes" and also check "Supplier response is required"

   vi. From the "Field Type" drop-down menu, choose desired response type for supplier (Text (single line), Text (Multi-line), Yes/No, etc.)

   vii. Select "Save Changes"

   viii. Repeat steps above to add more additional fields

d. If selecting from library, then click the magnifying glass and then select GA library on the next screen. From the menu, view the options, check the box to select, and then select "Add Selected Item Fields"

TIP: Finalize cost line items (next step) before adding additional item fields.

25. Add Cost Line Item(s)

a. The Items page allows the Buyer to create one or more cost line items for suppliers to submit pricing. Lines may be created on the Product Line Items tab, Service Line Items tab or both. **IMPORTANT: Although eRFQCs do not result in contract award, the buyer must be able to select those suppliers that are considered pre-qualified and publishing this information.**

Complete Event Set-Up

To do so, the Buyer MUST have at least one cost line item.

b. Select the desired tab. If your solicitation includes both products & services, you will add items for both tabs. NOTE: if you used a template to create your event, you will have pre-populated content. Edit or delete as desired.

c. Select "Add Product Line Item"/ "Add Service Line Item, and choose:

    i. "Add New Item" to create custom cost line item. Enter required information. **IMPORTANT: be sure to check the box for "Unit Price is Required."** This ensures the suppliers does not leave the price line blank (which will prevent contract award). Select "Save Changes".

    ii. "Add Item from Library" to browse and select standard line items. Click the magnifying glass and then select GA Library. Check the box to select desired cost line items and then click "Add Selected Items".

d. If you have a significant number of line items to add, then select "Add or Import" and choose and of the following:

    i. "Add Item Group" to create one or more groups to organize multiple cost lines

        OR

    ii. "Import from File" to download Excel file template, populate and then import (beneficial for large number of cost line items)

TIP #1: NIGP codes can be added to the line item, if desired. However, only NIGP codes added in the "Set-up" section will display on the GPR and generate supplier invitations.

TIP #2: Since cost is not being requested, the buyer must include a note instructing suppliers as to the dollar amount to enter. Please see sample text shown here. Buyers should never instruct suppliers to enter $1 in the total cost line item as this will generate an inaccurate protest filing period countdown on the Georgia Procurement Registry.

Add Product Line Item ▼

Add New Item

Add Item from Library

Add Product Line Item

Name *

Description

2500 characters remaining

Catalog Number

Quantity   1.0000

☐ Make Quantity a Supplier Response Field

Unit of Measure * EA - Each

▼ Item Details

Requested Delivery   ⦿ Date   ○ Days after award

Requested Delivery Date

mm/dd/yyyy

Options   ☑ Unit Price is Required
    ☐ Estimated Delivery Date is Required
    Unit price will be required if Estimated Delivery is required.

Commodity Code   –   [Edit]

Historical Unit Price   USD

Target Price   USD

Attach File   No File Attached [Upload]

Display Order *   Last

★ Required   [Save Changes] [Close]

IMPORTANT: Check "Unit Price is Required" to ensure Supplier is prompted to enter pricing

Items   Event Actions ▼ | History | ?

Product Line Items (0)   Service Line Items (1)

Go To   All Groups   [Add or Import ▼] [Export Items]   ★ Unit Price is Required

∨ Group S1   Manage Group ▼ | Delete Selected Item(s)

eRFQC Estimated Value ✕
For system purposes only, please enter the following estimated value (Issuing Officer to Insert Amount Here):
(See full description)

Requested Service Delivery

Name   –   [Edit ▼] ☐

S1.1   eRFQC   ☐

[Add Service Line Item ▼]

∨ Group S1   (1 - 1 of 1 items)   Manage Group ▼ | Delete Selected Item(s)

#	Name	Description	Qty	UOM	Requested Service Delivery	
S1.1	eRFQC Estimated Value ★	For system purposes on... (See full description)	1	–	–	[Edit ▼] ☐

[Add Service Line Item ▼]

Complete Event Set-Up	
26. View Suppliers Invited by Commodity Code a. View the "Suppliers Invited by Commodity Code" tab to see which registered suppliers will receive an email notification based on the NIGP Codes selected in the "Setup" section. b. Proceed to the next step to invite additional suppliers **TIP:** if the tab is blank, return to the "Setup" section and select NIGP codes.	
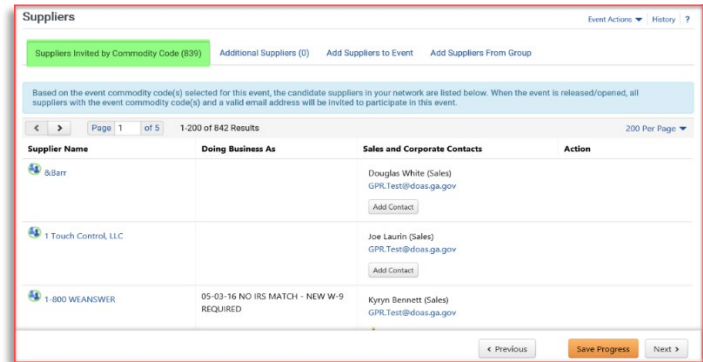
27. Invite Additional Suppliers
a. Select the "Add Suppliers to Event" tab and choose to:
    i. Invite additional <u>registered</u> suppliers by search
    OR
    ii. Select "Manually Invite Suppliers" and desired option
b. To add by "Search Registered Suppliers":
    i. Enter part of the Supplier's name
    ii. Select Relationship (In Network or Out of Network) See note below.
    iii. Select desired supplier from results
c. To manually invite suppliers:
    i. If only adding a few suppliers, then select "Add Supplier to Event", enter Supplier Name, contact person and email address and then click "Save" or "Save and Add Another"
    ii. If adding multiple suppliers, then select "Get Import Template", download and complete template, and then select "Import" to import file
d. Select "Save Progress"
e. Select "Next"
NOTE: The "Search Registered Suppliers" menu allows the buyer to search for additional companies that are registered in Team Georgia Marketplace™ (TGM) (*In Network*) or that are registered directly with Jaggaer (*Out of Network*). The buyer can search for suppliers by name, supplier contact, location or NAICS code. As the State has not adopted NAICS codes, this search feature will not work to find *In Network* suppliers.
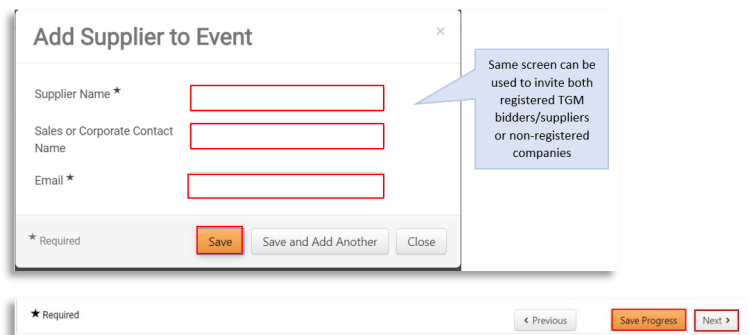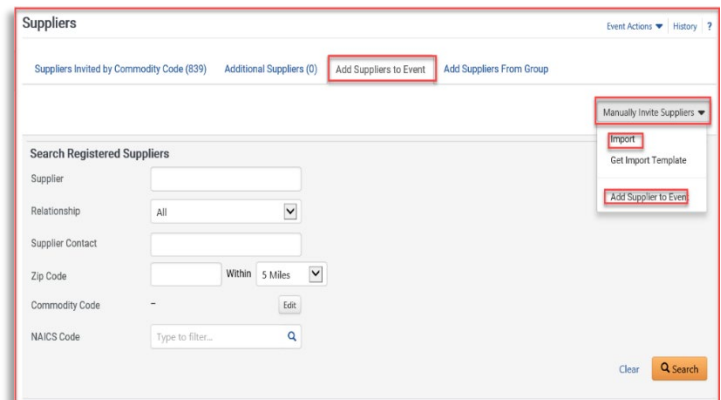
Complete Event Set-Up

28. Review and Submit

   a.   Review your progress for each section
   b.   Click the Section Title to return to a section for editing
   c.   Once satisfied, click "Submit"
   d.   View the "Event Submitted" confirmation page and summary of your event posting
   e.   If there is workflow surrounding the event, Approval Steps can be viewed by clicking "View Approval Steps"
   f.   In this example as the Estimated Value is above the state entity's DPA limit there is an SPD's Approval step before the bid is released to suppliers.
   g.   View the "Event Submitted" confirmation page and summary of your event posting. Notice the Event Status is in Pending Approval as the event is under SPD for approval. Once SPD approves the event, the Event status will be changed to 'Open' as it will be released to suppliers and an email notification will be sent out to all the suppliers that are matched to the event NIGP codes.

   ❗ **IMPORTANT: Once the event is under 'Open' status you can verify it on the GPR Public Interface https://ssl.doas.state.ga.us/gpr/**

29. Complete Final Approvals

   a.   Select "Return to My Event"
   b.   Observe the event status. If status is "Approved", no further action is required. If status is "Pending", then review pending approvals.
   c.   Open the "Tools" menu and select "Approvals"
   d.   Observe the steps remaining in the "Sourcing Event Approval Workflow" tab. The **Buyer Pre Bid Finalization** approval step requires the buyer to approve the event before it will be in approval status.
   e.   Perform a final review of your event. When ready, select the "Workflow Actions" drop down. Select "Approve."

f. Observe new status of event. If no other approvals are remaining, the status will display as "Approved.

NOTE: Once the scheduled open date/time arrives, the event will transition to "Open" status, a public notice will appear on the Georgia Procurement Registry, and courtesy emails will be sent to all invited suppliers.

Complete Event Set-Up	
30. Email Notification to Supplier Once the event is Open, email notifications will be sent to all invited suppliers. The email will include a link to view the event. Interested suppliers may elect to respond. To submit an electronic bid, suppliers will be prompted to create an account in Jaggaer Sourcing Director.	
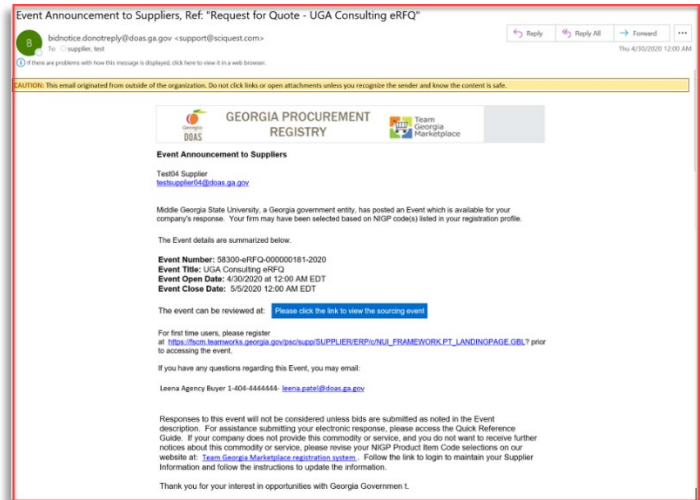
Managing Question and Answer (Q&A) Board
Review the ***Managing Q&A Board Quick Reference Guide*** for additional instructions.

Amending, Extending or Cancelling Events
Review the ***Amending, Extending or Cancelling Events Quick Reference Guide*** for additional instructions.

Viewing Supplier Progress in "Open" Status	
RECOMMENDED: While the event is in "Open" status, the buyer should actively monitor supplier progress to ensure adequate competition. The buyer may invite additional suppliers to respond or extend the event to ensure adequate competition. Follow the steps below to view supplier progress. **The identities of the bidders submitting responses is confidential and should not be shared publicly.**	

1. Access Website to Sign In
  a. Open up a web browser
  b. Go to https://solutions.sciquest.com/apps/Router/Login?OrgName=Georgia	

2. Enter Logon Credentials
  a. Enter User Name
  b. Enter Password
  c. Click "SIGN IN"	
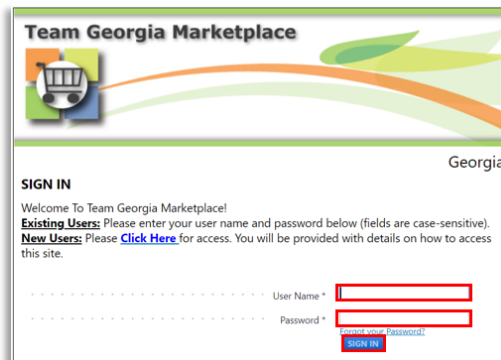
Viewing Supplier Progress in "Open" Status	

3. **Access the Sourcing Menu**
 	
   a. Navigate to Sourcing Menu Icon
   b. Select "Sourcing Events"
   c. Select "Sourcing Events Home"	
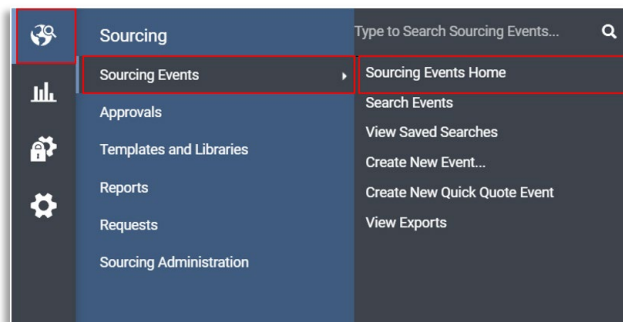
4. **Search for Event**
   a. View the Sourcing Event Summary table
   b. Choose the preferred sorting feature from the "View Sourcing Events By" drop-down menu
   c. From the search results, find and click on the "Event Number" to select the event	
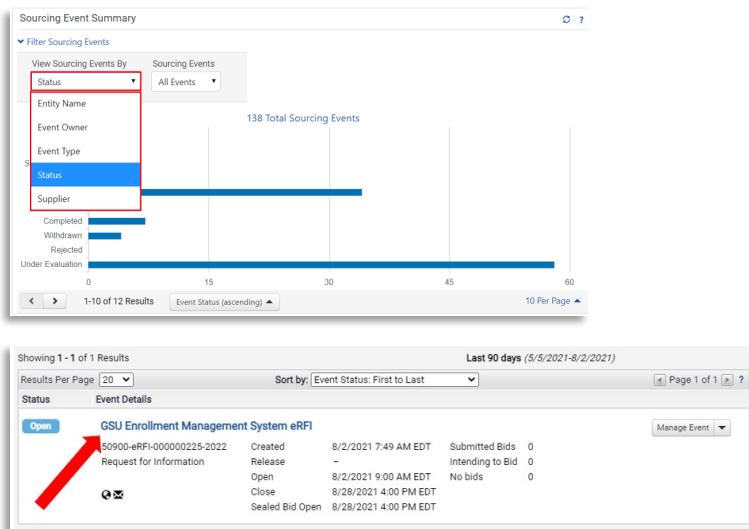
5. **View Supplier Progress**
   a. From the left-hand side menu, select "Evaluations" to expand
   b. Select "Supplier Responses"
   c. View supplier progress, including whether supplier has accepted the email invitation, viewed the bid, selected no bid/intent to bid and overall progress in submitting response.
   d. Select "Resend Supplier Invite" to resend the email invitation to invited suppliers if needed.
 	
NOTE: The contents of suppliers' responses will not be visible to the buyer until the event closes and is under evaluation. **The identities of the bidders submitting responses is confidential and should not be shared publicly.**	

Viewing Supplier Progress in "Open" Status

Conducting Evaluation and Selection Activities	
1. **Follow the steps above to logon and locate the event**	See Above

2. **Select Event**
    a. Locate event in Search Results and Select "Manage Event"
    b. Select "Manage Event" from drop-down menu	

3. **View Supplier Responses Individually**
    a. The event will open in the "Evaluations" section and display supplier responses
    b. The Buyer can observe the submission status of all suppliers
    c. To view submitted responses, click the "View Response" option to the right of the supplier's name
    d. View the supplier's response to the prerequisites
    e. Click "Next" or click on "Supplier Attachments" to view submitted files. The buyer can click to open and download each file.
    f. Click "Next" or click on "Questions" to view responses to event questions
    g. NOTE: if file attachments were allowed to specific questions, then these file uploads will appear in this section. Click on the file name to download and open each file.
    h. Once complete, click "Back to Event" to select the next supplier's response to review
 	
TIP: The "Supplier Attachments" section will display all files uploaded by the supplier in the "Supplier Attachments" section. However, check the "Questions" section for file(s) uploaded in response to a particular question.

4. **Side-by-Side Review and Exporting Supplier Responses**

   a. As an alternative to reviewing each response individually, the buyer can also conduct a side-by-side review by completing the following steps:

      i. Check the box to select all desired suppliers

      ii. Then select "Evaluate Selected Responses"

      iii. On the new screen, observe each supplier appears in a separate column. Click to expand the rows (Total Bid, Product Line Items, Supplier Attachment, Questions) to view each supplier's response side-by-side

   b. Another option is to export supplier responses.

      i. To export all supplier responses from the system, start from the Evaluations section, Supplier Responses subsection.

      ii. Select the dropdown arrow for "Evaluation Actions" and choose "Export All Responses"

      iii. On the "Evaluation Export" pop-up, select "Submit"

      iv. A new pop-up will appear, stating "You have successfully submitted an export request, click here to view it." Click the blue text to access the report.

      v. On the new screen, select the file name to download and save.

      vi. Once finished, click on "View Event" (to the right of the Event Number) to return to the event.

Conducting Evaluation and Selection Activities

5. Disqualifying Suppliers

  a. During administrative review, the buyer may determine that a supplier is disqualified (failing mandatory requirement, submitting a conditional bid, etc.). The buyer can identify the supplier as disqualified by completing the following steps:

    i. From the side-by-side comparison (see previous step), click on the drop-down arrow for the supplier's name

    ii. Enter the reason for disqualification and click "Continue"

    iii. Observe that disqualified supplier no longer appears on the current page. Select "Back to Event" to return to Supplier Responses page

    iv. Observe the supplier's status has changed from "Submitted" to "Disqualified"

  b. If the buyer needs to undo disqualification, select the "View Response" drop-down menu and select "Re-Qualify"

NOTE: disqualifying a supplier within Sourcing Director does not send a communication to the supplier. When the buyer is ready to post the NOIA/NOA, the buyer must list all unsuccessful suppliers and the reason each supplier was not selected for award.

6. **Selecting Prequalified Suppliers**

   a. Select all supplier responses and then select "Evaluate Selected Responses".

   b. When the buyer is ready to select all suppliers to be prequalified, the buyer should:

      i. Check the box for "Total Bid" or select the specific cost line item(s) to be awarded

      ii. Select the drop-down menu for "Scenario Award Actions"

      iii. Select "Split Between Suppliers." This will allow the Buyer to select all suppliers that will be prequalified.

      iv. Observe that the "Split Item" screen will appear, listing all suppliers that bid that have not been disqualified.

      v. Observe the total quantity on the event. In this example, there was a single line item with a quantity of "1". Based on the number of suppliers to be pre-qualified, the buyer will distribute the "1" item amongst the selected suppliers.

      vi. EXAMPLE: in the example shown, the buyer has selected all four suppliers to be pre-qualified. As a result ".25" was awarded to each supplier.

      vii. Once you have assigned a value to each supplier to be pre-qualified, select "Save and Close"

      viii. Observe that the selected suppliers will include the designation "Pending Award".

      ix. If incorrect, the buyer can click the drop-down by the supplier's name and select "Remove Award from Supplier".

      x. **If correct, the buyer MUST select "Finalize Award"**

      xi. In the pop-up box, enter the Scenario Name (for example, Prequalified Suppliers)

      xii. Click "Save and Finalize"

      xiii. Observe Award Scenario Title and "Finalized". Observe that new

Example:

option will appear to "Remove Finalized Award" if needed.

NOTE: Completing the steps above will complete the award selection. However, the event status will remain "Under Evaluation" on the Georgia Procurement Registry until the buyer completes the public notice steps noted below.

7. **Public Notice Process**
   a. After you complete the step above, select "Back to Event".
   b. On the left navigation click on Tools to expand and Click on "Award Notifications"
   c. Under Public Site Award Attachments, click on "Add Attachments"
   d. On the "Add Attachment" pop-up menu, click "Select Files"
   e. Browse your computer to select the completed **SPD-AP008 RFQC List of Qualified Suppliers** and select "Open"
   f. Observe the file now appears in the Attachments section in green (100% uploaded).
   g. Select "Save Changes"

h. **IMPORTANT:** Next, click the drop-down menu for "Edit" and choose "Publish". You must choose "publish" for the status to update on the Georgia Procurement Registry and for the file to be visible to the public.

i. On the pop-up message, click "Yes" to confirm publication

j. Observe that the "Edit" option is now replaced by an option to "Unpublish"

k. Repeat the steps above to add and publish any additional files, such as SPD-EP002 Sample Bid Evaluation Template.

l. Send a courtesy email to all suppliers alerting them that the eRFQC results have been posted. The buyer may do so from his/her email account or by following the steps in Tip #3 below.
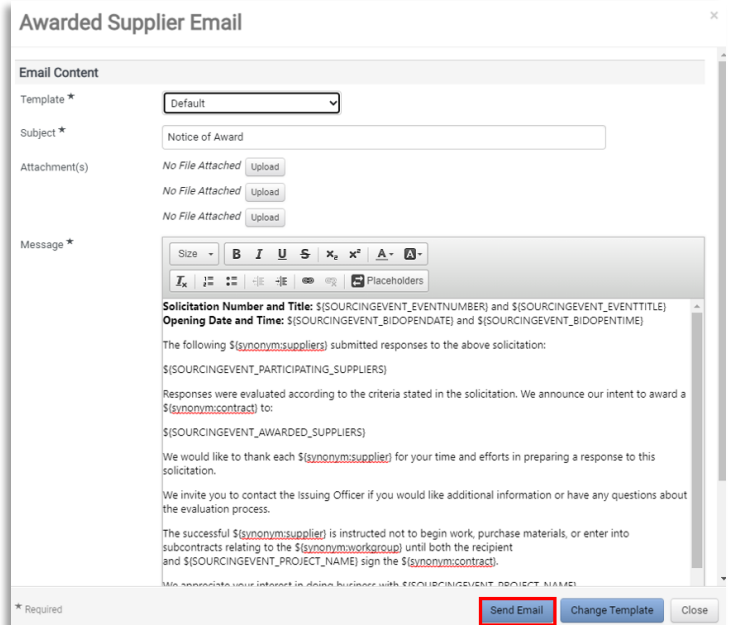
TIP #1: Visit the Georgia Procurement Registry and search for your bid to confirm the status is now at "Notice of Intent to Award" and the protest countdown has begun.
https://ssl.doas.state.ga.us/gpr/

TIP #2: In Jaggaer Sourcing Director, the event status will remain in "Under Evaluation". The buyer must observe the NOIA protest filing period before approving the final award in Jaggaer Sourcing Director.

TIP #3: The "Award Notifications" section includes the option to send email notifications to suppliers. However, these templates cannot be generated during the NOIA phase. SPD strongly recommends sending a courtesy email to all participating suppliers alerting them that the NOIA has been published. The buyer may do so from his/her email account or by following these steps:

a. Return to the Evaluations section, Supplier Responses subsection.

b. Check the box beside all participating suppliers.

c. Select the drop-down menu for "Evaluation Actions" and select "Ask a Question"

d. In the pop-up box, enter the Subject line (Notice of Intent to Award) and question (see example) and select "Submit a Question".

e. Observe that the Q & A board menu is displayed with the new posting. This will trigger an email to all selected suppliers.

8. **Approve Final Results of eRFQC**
   a. On right side, click on the "Workflow Actions" dropdown and select "Approve"
   b. Observe the Event is now in Awarded status
   c. Verify status of your event on the GPR and send courtesy emails to suppliers following the tips below.

Conducting Evaluation and Selection Activities

TIP #1: Visit the Georgia Procurement Registry and search for your bid to confirm the status is now at "Notice of Award" https://ssl.doas.state.ga.us/gpr/

TIP #2: The "Award Notifications" section includes the option to send email notifications to suppliers. SPD strongly recommends sending a courtesy email to all participating suppliers alerting them that the RFQC results have been finalized and the identification of prequalified suppliers. To do so, complete these steps:

    a. In the Award Notification section, select "Preview and Send" for the Awarded Supplier Email type

    b. Review message and select "Send Email"

    c. On the pop-up confirmation, select "Send Email"

    d. Next, proceed to the Participating Supplier Email type and select "Preview and Send"

    e. On the pop-up confirmation, select "Send Email"

Confirm

Are you sure you want to send the award notification email?

Send Email | No