Team Georgia Marketplace™

Super User Update
Strategic Sourcing and Contracts

July 21, 2010

Agenda

- Overview of Super User Role and Responsibilities

- Common Issues in Team Georgia Marketplace

- Updates and Problem Solving
  - Strategic Sourcing
    - Creating an Event
    - Maintaining an Event
    - Analyzing an Event
  - Contracts: "How do I…"

Overview

- **One Year +**

  – Team Georgia Marketplace™ is celebrating the completion of one year of post pilot deployment waves which includes 12 agencies, approximately 3200 users, and nearly $1.4 billion captured in addressable state spend. Great job everyone!

- **Super User Program**

  – Super Users were trained before other users, along with agency trainers, to learn module details and to have the time to prepare for Go Live as the first line of support. Their support has been referred to as Level 0.

  – DOAS would like to enhance the super user program to maximize its benefits to the agencies. Our goal is to assist your agency create and sustain a vibrant super user/Level 0 program that meets the needs of your users.

Benefits from Super User Program

Agency Super Users

- Provide rapid access for agency users to Super User expertise

- Assist users to avoid problems before they occur

- Monitor and communicate issues and solutions to all users

- Train new users on agency business processes

Roles and Responsibilities

- Provide support to agency users in his or her field of expertise.

- Answer agency user questions and solve problems when possible.

- Be the conduit between the agency and the Help Desk.

- Share solutions with agency users.

Attributes of Super Users

- Knowledge of Agency Business Processes

- Strong experience in the business processes they are going to support

- Ability to use Team Georgia Marketplace™

- Ability to help users with processes and problem solutions

- Interest in helping others to succeed

- Time available to coach other users

Support for Super Users

- Ad hoc classes in all modules

- Updates and webinars specific to Super Users

- Emails with communication on important information for their modules

- Monthly report on agency issues

- Please send other suggestions to Licia Duryea: lduryea@sao.ga.gov

User Group Meetings

- Our User Group meets
  - the third Tuesday of the month
  - 2:00 – 4:00 PM
  - Room 1816A

- If you would like an invitation to the User Group, please contact Licia Duryea: lduryea@sao.ga.gov

Your Presenter

Carissa Cox

Title: Business Analyst

Education: B.S. Computer Information Systems

Contact:

carissa.cox@doas.ga.gov

404-463-4037

How do I define the Event Summary?

Modify an Event

Event Summary

Business Unit: 40300   Event ID: DAS0000028 **Round:**   1   **Version:**   1   **Event Format:**   Buy

Event Type: RFx	RF Type: [▼]	Origin: [ ] 🔍 Fiscal Year: [2011]
Event Status: Open	Change to Auction	Preview Date: 06/10/2010 10:00AM EDT
*Event Name: [ ]		*Start Date: 06/10/2010 10:00AM EDT
Description: [ ]		*End Date: 06/30/2010 5:00PM EDT
		Copy From: [▼] Go
Category Type: [▼] Purchase Type: [▼]		

What Posts to the GPR?

Bid Information

Close Window

Bid Title	Statesboro Hangar Door Installation
Bid Number	40300-DAS0000029
Agency	40300-ADMINISTRATIVE,SERVICES AGENCY
Contact Person	Faith E Scruggs 404-657-9443
Contact Phone Number	
Contact E-mail Address	faith.scruggs@doas.ga.gov
Bid Process	RFQ
Purchase Type	Open Market Purchase
Category Type	Goods
Date Posted	May 5, 2010
Bid Closing Date/Time	May 19, 2010@3:00 PM
Last Revision Date	May 14, 2010@3:10 PM
Bid Status	Awarded
Government Type	state
Fiscal Year	10

Description Information:

Pursuant to the State Purchasing Act (Official Code of Georgia Annotated §§50-5-50 et. seq.), this electronic Request for Quotes (eRFQ) is being issued to establish one contract with one qualified Offeror who will provide for the purchase and installation of a hangar door at the Statesboro location to the Georgia Aviation Authority (hereinafter, the State Entity) as further described in this eRFQ.

When do I use an RFI Event?

- RFI - Request for Information

  – The purpose of the RFI is to collect information about the capabilities of various bidders/suppliers to allow you to pre-qualify your bidders/suppliers.

  – RFI Responses can be scored.

What are the Event Settings and Options?

Modify an Event

Event Settings and Options

Business Unit: 40300   Event ID: DAS0000028 Round: 1   Version: 1   Event Format: Buy   Event Type: RFx

☐ Allow Bidder XML Downloads
☐ Bid Required On All Lines
☐ Multiple Bids Allowed
☑ Allow Edit of Posted Bids

Round\Version Display: Display Round and Version ▾
☑ Sealed Event
☐ Display Bid Factor Weightings

Factor Event Score Into: Total Score ▾
Header Weighting: [   ]

Start Price: Do Not Display ▾

What do I define on the Payment Terms and Contact Information page?

Modify an Event

Event Contact Details

Payment & Currency Information

*Currency:	USD 🔍 [Exchange Rate](#)	*Rate Type: CRRNT 🔍
Pay Method:	▾	Rate Date: 06/05/2010 📅
Payment Terms:	🔍	☐ Allow bids in other currencies
Bill Addrs:	PO_001002 🔍	☑ Tax Exempt
Buyer:	FESCRUGG 🔍	Exempt ID: State of GA

Event Contact

Contact Name: John Williams

Email ID: fscmtst@sao.ga.gov

Phone: 404-463-5000

Strategic Sourcing Definitions

- Bid Quantity Rule
  - <u>Allow Extra Quantity to be Bid</u>: Select to allow bidders to place bids for quantities beyond the requested event quantity up to the maximum bid quantity.
  - <u>Bid Up to Maximum Quantity</u>: Select to allow bidders to place bids up to a maximum quantity for the line.

Strategic Sourcing Definitions

- Bid Quantity Rule *(continued)*

  - <u>Quantity Not Applicable</u>: Bidders must enter a bid price, but not a bid quantity. This option is used when the award is based on dollars.

  - <u>Requested Quantity Required</u>: Select to indicate that bidders must place bids for the requested quantity only.

Where do I define the Bid Quantity Rule?

Create an Event

Line Details

Event ID: NEXT
Line: 1

Description: SPLS 8.5X14 COPY CS

Requested Quantity: 2.8000
Start Price: 41.9900
Physical Nature: Goods

▼ Shipping Information

Find | View All   First ◄ 1 of 1 ► Last

Schedule: 1
Quantity: 2.8000   Due Date: 08/07/2010   Freight Terms:
Ship Via: COMMON   Ship To: PO_217001   Ship From:

▼ Bid Parameters

Reserve Price: ☐ Bid Required
Min Quantity: 0.0000   Max Quantity: 2.8000
Bid Quantity Rule: Requested Quantity Required ▼
Alternate Units of Measure: Allow Extra Quantity to be Bid
☐ User Defined Price Breaks   Bid Up to Maximum Quantity
                               Quantity Not Applicable
                               Requested Quantity Required

► Item Specification

► Line Image

How do I Invite Bidders/Supplier to an event for a related NIGP Code?

What are Event Bid Factors?

– Determining what bid factor to use

– Understanding Ideal Response Required

What are Event Bid Factors?

- Event Bid Factors
  - Include on Contract (Do not use at this time)

What are Line Bid Factors?

- Line Bid Factors
  - Default is always "What is your Bid Price"
  - Do not remove this bid factor, but you can add additional bid factors if required at the line level.

Modify an Event

Line Bid Factors

Line:	1	Bid Factor Weighting Total:	100.00000
Item ID:		Remaining Bid Factor Weight:	0.00000
Description:	Hangar Door Installation		

Bid Factors

Seq Nbr: 1   Bid Factor: BID_PRICE   Type: Monetary   Weighting: [100.00000] [+] [−]

Question: What is your bid price?

☑ Display Bid Factor
   ☑ Bid Factor Response Required
   ☐ Ideal Response Required
   ☐ Include on Contract

Best: 0.000000   Worst: 22000.000000

▷ Price Components

▷ Cost Contribution

How do I define comments and add attachments?

![Team Georgia Marketplace™ logo] Team Georgia Marketplace™

DOAS, State Purchasing Division

Comments: ➕ ➖

06/25/2010 Version #3 was created to add response for the Questions and Answer period. Please review the Question and Answer Responses

☑ Send To Bidder   ☐ Include On Award   Standard Comments

Add Attachment

First ◀ 1-9 of 9 ▶ Last

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications		
1 100_1378.JPG	Picture of Hangar 1	☑	☐	☐	🔍	➖
2 100_1379.JPG	Picture of Hangar 2	☑	☐	☐	🔍	➖
3 100_1380.JPG	Picture of Hangar 3	☑	☐	☐	🔍	➖
4 100_1381.JPG	Picture of Hangar 4	☑	☐	☐	🔍	➖
5 100_1382.JPG	Picture of Hangar 5	☑	☐	☐	🔍	➖
6 100_1383.JPG	Picture of Hangar 6	☑	☐	☐	🔍	➖
7 GAA_Statesboro_Hangar_Door_Installation.doc	Hangar Door Installation eRFQ	☑	☐	☐	🔍	➖
8 eRFQ_Instructions.doc	eRFQ Instructions	☑	☐	☐	🔍	➖
9 Q_and_A_Statesboro_Hangar_Door_Installation_06252010.doc	Questions and Answer Respon:	☑	☐	☐	🔍	➖

How do I use the Event Workbench?

How do I cancel an Award made to a Purchase Order?

What happens when a Purchase Order from a Sourcing Event award is canceled?

How do I cancel an award made to a General Contract?

I awarded my event. Why is the Event Status still showing Pending Award?

How do I define the Award Details to the Bidders?

What happens if your bidder becomes a supplier prior to the awarding of the event?

– The system will error and awarding may take longer than normal.

– Technical Support will need to update the associated Supplier's profile

– The bidder will need to register as a supplier

What's required on the Distribution Default page?

- What happens when my Event starts with a requisition?

Award Details

Bid ID: 1   Bidder Setid: STATE   Bidder ID: 0000478475   PO Business Unit: 40300

Distribution

*Account	*Fund	*Dept	*Fund Src	Program	Class	PC Bus Unit	Project	Activity
1 100001	1	4030104000	01					

Copying transactions into an Event

Completing the Award Process

Contract	Create Release	Review Releases

SetID: STATE

Contract ID: 40300-233-DAS0000011-0001

Administrator: FESCRUGG

*Status: Approved

Faith E Scruggs 404-657-9443

Add a Document

▽ **Header**

Process Option: General Contract

Vendor: REDTOPAUCT-001

Vendor ID: 0000452960   THE RED TOP AUTO AUCTION

Begin Date: 08/10/2009

Expire Date: 06/30/2010

Currency: USD   CRRNT

Primary Contact: 1   Corey Sanford

Vendor Contract Ref:

Description: REPOST OF VEHICLE AUCTION SERV

Master Contract ID:

☑ **Tax Exempt** 581125844   **Fiscal Year:** 2010

Add Comments   Activity Log
Contract Activities   Document Status
Primary Contact Info   Thresholds & Notifications
Contract Agreement
Amount Summary

Maximum Amount: 573,000.00 USD

Line Released: 0.00

Open Item Relsd: 0.00

Total Released Amount: 0.00

▽ **Order Contract Options**

☐ Allow Multicurrency PO   ☐ Allow Open Item Reference   ☐ Must Use Contract Rate Date

Your Presenter

Title:

Functional Consultant

Team Georgia Marketplace

Kyle Morton

How do I assign a business unit to a contract?

- Validating agency contracts are set up correctly – Assign your business unit

What fields do I complete on the PO defaults?

- Validating agency contracts are set up correctly – Enter PO Defaults page

How do I run a query to find contracts not linked to a Business Unit?

- Run query: 0SC005_AC_NO_BUS_UNIT

How do I enter an agency contract?

How do I find out what contracts are not set up correctly?

- Run query: 0SC006_AC_SETUP_WRONG

Contract like: 427%

OK   Cancel

| Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | **Run** |

Contract like = 427-93-1010015%

View All | Rerun Query | Download to Excel   First ◀ 1-3 of 3 ▶ Last

	SetID	Contract	Vndr SetID	Vendor	Status - A	Descr	Buyer	Begin Dt	Expire Dt	Entered By	Corp Contract - N	Max. Amt > 0	Open Item - Y	Year <> 0
1	STATE	427-93-10100155-99	STATE	0000014907	O	Multi Funded Amendment		06/01/2010	06/30/2010	SURIMAD	N	330669.000	Y	2010
2	STATE	427-93-10100156-99	STATE	0000010330	O	MULTI FUNDED AMENDMENT		06/01/2010	06/30/2010	SURIMAD	N	231470.670	Y	2010
3	STATE	427-93-10100159-99	STATE	0000013992	O	MULTI FUNDED AMENDMENT		06/01/2010	06/30/2010	SURIMAD	N	26870.000	Y	2010

How do I set an agreement code?

- Using agreement codes on contracts

How do I set an agreement code?

Contract Header Agreement Assignments

SetID:	STATE	**Contract Status:**	Open
Contract ID:	42700-401-0000005671	**Expire Date:**	09/30/2010
Description:	ARRA FUNDS 201	**Begin Date:**	06/01/2010

Agreements Find | View All First ◄ 1 of 1 ► Last

Select the Agreement Code

*Sequence: 10   **Compliance Status:** Not Set   ➕ ➖

*Agreement Code: SPD_CP025 🔍

*Agreement Description: SPD form CP025 - Contract Assessment Report

*Result Type: None

Enter the target/due date

Target Date: 08/31/2010 📅

Notification Comments: Please complete and attach a contract assessment report

Financial Implication:

Select to set up notifications

☑ **Include In Contract Document**

Clause Assignments   Workflow Assignments

Verification Steps   Customize | Find | ▦   First ◄ 1 of 1 ► Last

Details | Comments

Assign who should upload the document

*Step	**Description**	***Step Owner**	***Verification Method**	***Due/Start Notify Date**	**Activity Status**		
10	Contract Assessment Rep	Stacey Stith 404-657-8 🔍	Attachment	08/31/2010 📅	No Start	➕	➖

How do I set workflow notifications?

Contract Entry

Contract Header Workflow Assignments

| SetID: | STATE | **Contract Status:** | Open | **Begin Date:** | 06/01/2010 |
| **Contract ID:** | 42700-401-0000005671 | | | **Expire Date:** | 09/30/2010 |

Description

Agreement   Add a row for who should upload the form and a row for   PD_CP025   Set the days for
Agreement   who should be notified when it is done or if it is past due.   notification.

Notification   Customize | Find   First 1-2 of 2

*Sequence	*Notification Type	Verify Step	User Type	Recipient Name	*Email Address	*Sequence	Notify On Status Change	Reminder Number Of Days Prior	Final Reminder Days	Passed Target
10	Verification Step	10	Internal	Stacey Stith 404-657-8851	sstith@dhr.state.ga.us	10	☐	10	5	☑
20	Agreement		Internal	Annette Bazhaw 4.656.46	anbazhaw@dhr.state.ga.u	20	☑			☑

OK   Cancel

How do I enter compliance comments?

How do I verify the steps?

How do I view all agreement codes and status?

– Run query 0SC007_AGREEMENT_STATUS

Buy Agree ID: 467%

OK   Cancel

Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | **Run**

Buy Agree ID = 467%

View All | Rerun Query | Download to Excel   First ◀ 1-9 of 9 ▶ Last

	Buy Agree ID	Status	Vendor	Descr	Buyer	Agreement Code	Descript	Status	Target Date
1	46700-375-0000002166	O	0000000126	fsdklafjsdklj	BISHOM01	CO_INFORMATION	COMPANY INFORMATION	Not Set	12/01/2010
2	46700-274-0000003782	A	0000069998	274/Clayton TC Fire Sys Inspec	ROGERG00	CO_INFORMATION	COMPANY INFORMATION - Certificate of Insurance	Not Set	06/30/2010
3	46700-274-0000003782	A	0000069998	274/Clayton TC Fire Sys Inspec	ROGERG00	QUANTITY	Provide testing/inspection results for each time of service	Not Set	12/29/2009
4	46700-262-0000011252-1	A	0000146773	262 Grease Trap Maintenance	BALLL00	CO_INFORMATION	COMPANY INFORMATION - Certificate of Insurance	Not Set	06/30/2010
5	46700-203-	A	0000205482	203 Boiler Chemical Feed	EVANSC00	CO_INFORMATION	COMPANY INFORMATION -	Not	06/30/2010

How do I make my contract viewable to other Contract Administrators?

How do I import contract documents?

| Contract | Create Release | Review Releases |

SetID: STATE

***Status:** Approved

Contract ID: 46700-490-000007775A

Administrator: JACKSB00   Bonita J Jackson 404-656-6132

Click Add

Add a Document

▽ Header

Process Option: Purchase Order

Vendor: SCARBOR&SO-001

Vendor ID: 0000010751   SCARBOR AND SONS

Edit Comments   Activity Log
Contract Activities   Document Status
Primary Contact Info   Thresholds & Notifications
Contract Agreement

Create Document

Source: Purchasing Contracts

SetID: STATE   46700-490-0000008131

Vendor ID: 0000438813   CKT FARM

Select the template used

***Document Type:** GDC Service and Maint Contract ▾

Configurator ID: GDC_SERVICE_MAINT

***Description:** Enter contract description here

Enter contract description

ance Contract

***Administrator:** JACKSB00   Bonita J Jackson 404-656-6132

Sponsor:

Department:

Click Import

| Create Document | Import Document |

External Contacts List

| Save |

Document View Access

47

How do I import contract documents?

How do I import contract **documents?**

Document Type: GDC Service and Maint Contract

Sponsor:

*Administrator: KMORTON   Kyle M. Morton 404-463-4066

Department:

*Description: From RFQ ID 0000006886

Choose the Import Option based on the contract status.

Import Option

○ **Current Contract/Document**
(Current Contract/Document with no formal amendments or history to load.)

○ **Amended Contract**
(Single current contract as fully amended requiring an amendment number. History is optional.)

○ **Amended Contract and Amendment**
(Current contract as fully amended and a current separate amendment summary file. History is optional.)

◉ **Original and Amen**
(Original contract as ...

Documents should include the contract number.

Enter the version, status and dates.

Current Version   ◀ 1-2 of 2 ▶ Last

Basic Info | Deta

Type	File Name	Version	Amendment	Status	Status Date	Status Time	Upload	Clear
Original Contract	XXXXX-XXX-XXXXXXXXX.pdf	1.00		Executed	07/01/2009		Upload	Clear
Amendment File	XXXXX-XXX-XXXXXXXXXXX-2011_RENEWAL.pdf	1.00	1	Draft	07/01/2010		Upload	Clear

To specify Prior Versions enter an Amendment number greater than 0 in the Current Version grid.

Done with Import | Cancel

How do I import contract documents?

How do I find a contract where there is no document?

- Run query:
  0SC008_CNTRCT_NO_DOC_NOR_EXECT

How do I locate AC and SWC PO's not linked to contracts?

- Run query:0SC009_PO_NO_CONTRACT

Unit: [ ]

Acctg Date >: [ ]

OK   Cancel

| Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | **Run** |

Unit = 42000,Acctg Date >=2010-06-30

View All | Rerun Query | Download to Excel

First ◄ 1-17 of 17 ► Last

	Unit	PO No.	Type	Status	Vendor	Buyer	Origin	Acctg Date	Contract	Event ID
1	42000	0000052249	AC	D	0000016651	REYNOLDS	090	07/06/2010		
2	42000	0000052258	CON	O	0000004794	SHUDSON	210	07/07/2010		
3	42000	0000052259	CON	O	0000004794	SHUDSON	210	07/07/2010		
4	42000	0000052260	CON	O	0000004794	SHUDSON	210	07/07/2010		
5	42000	0000052261	CON	O	0000004794	SHUDSON	210	07/07/2010		

Questions?

If you have more questions after this

presentation, please contact

DOAS Help Desk

404-657-6000