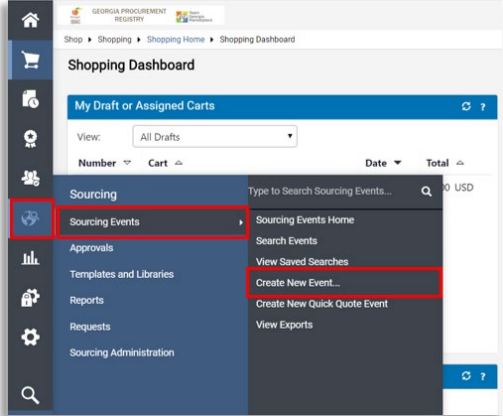# Electronic Request for Proposals (eRFP) Process

Jaggaer Sourcing Director for the University System of Georgia
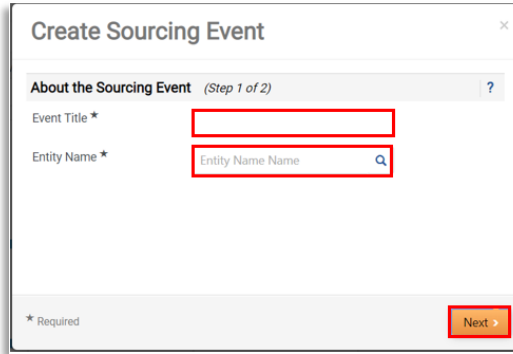
Create Draft eRFP	

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 Login Credentials
    a. Enter User Name
    b. Enter Password
    c. Select "SIGN IN"
	Team Georgia Marketplace
	
	 Georgia
	
	 SIGN IN
	 Welcome To Team Georgia Marketplace!
	 Existing Users: Please enter your user name and password below (fields are case-sensitive).
	 New Users: Please **Click Here** for access. You will be provided with details on how to access this site.
	
	 User Name *
	 Password *
	 Forgot your Password?
	 SIGN IN

3. Access the Sourcing Menu
 	
    a. Navigate to Sourcing Menu Icon
    b. Select "Sourcing Events"
    c. Select "Create New Event…"
	GEORGIA PROCUREMENT REGISTRY — Team Georgia Marketplace
	 Shop ▸ Shopping ▸ Shopping Home ▸ Shopping Dashboard
	 Shopping Dashboard
	 My Draft or Assigned Carts
	 View: All Drafts
	 Number ▽ Cart △ Date ▽ Total △ USD
	 Sourcing Type to Search Sourcing Events…
	 Sourcing Events ▸ Sourcing Events Home
	 Approvals Search Events
	 Templates and Libraries View Saved Searches
	 Reports Create New Event…
	 Requests Create New Quick Quote Event
	 Sourcing Administration View Exports

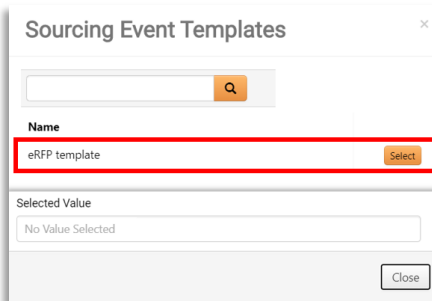| Create Draft eRFP	

4. eRFP Title and State Entity Name
   a. In the "Event Title" Field, **include the State Entity Abbreviation** plus Event Title Name (e.g. GSU Consulting eRFP)
   b. Select/Confirm your 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).	
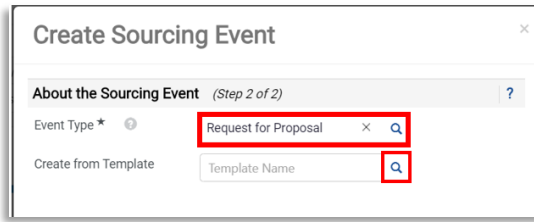
5. Select Event Type and Template
   a. In the Event Type Field, click the magnifying glass
   b. Select "Request for Proposal"
   c. **RECOMMENDED:** Use the eRFP template to simply event creation
      i. Click the magnifying glass for the "Create from Template" field
      ii. Click the "Select" button for eRFP template
    <u>OR</u>
   d. Skip step c if you want to create your own event and upload completed eRFP template (SPD-SP016 eRFP Template) under Buyer attachments.
   e. Select "Create Sourcing Event"	

6. Confirmation of Draft Event
   a. Verify that draft Event has been successfully created
   b. Continue event set-up by completing steps below	

Create Draft eRFP

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.

BOR Parking Access System
47200-eRFP-000000514-2021

Type: **Request for Proposal**
Event Status: **Draft**

Settings and Content ⌄

Setup	✔
Additional Event Details	✔
Users	✔
Description	✔
Prerequisites	5
Buyer Attachments	2
Supplier Attachments	✔
Questions	24
Supplier General Informa...	
Mandatory Questions	
Mandatory Scored Questi...	
Additional Scored Questi...	
Additional Item Fields	
Price Components	
Items	1
Suppliers	0
Review and Submit	✔

Tools ❯

★ Required   Save Progress   Next ❯

Complete Event Set-Up

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 can be left blank during initial set-up for eRFP.

TIP: Sourcing Director can be used to collect revised responses from suppliers after the Event close date. Examples would include revised technical proposals or cost proposals if negotiations occur. The Stage Title is entered by the issue officer at the time the negotiation round occurs.

NOTE: The Event Type and Entity cannot be edited once the draft is created. If there was an error in

Setup

Event Title ★	BOR Parking Access System
Event Type ❔	Request for Proposal
Entity	Board of Regents (University System of Georgia)
Event Number ★	47200-eRFP-000000514-2021
Stage Title ❔	

Complete Event Set-Up	

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 "search" 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.
 	
IMPORTANT: IF THE EVENT IS LIMITED TO SUPPLIERS THAT WERE PREQUALIFIED THROUGH AN eRFQC, THEN DO NOT SELECT ANY NIGP CODES. INSTEAD, ADD THE QUALIFIED SUPPLIERS TO THE EVENT TO BE NOTIFIED MANUALLY.	

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"
   f. To view codes selected, 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.
 	
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	

Complete Event Set-Up	
"Remove" (for the reporting NIGP code line) or deselect the checkbox (for the additional NIGP code line).	

10. Set Payment and Estimated Value
   a. To use cost analysis against estimated value of the project, enter that estimated value here. NOTE: The system will use this amount to calculate "savings" (if any) based on final award amount.
   b. Also please re-enter the same estimated value amount under Additional Event Details field. This is used for delegated purchasing authority (DPA) workflow.	

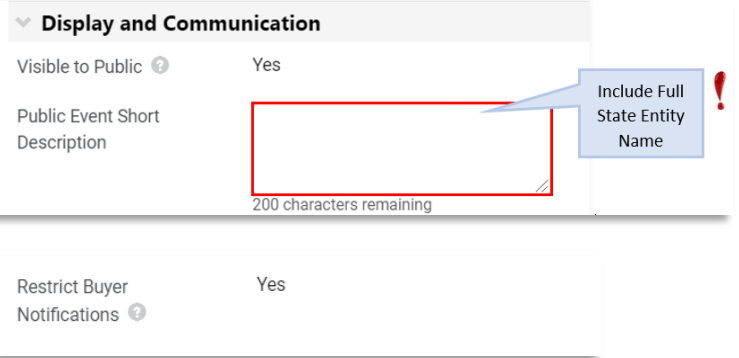| Complete Event Set-Up	

11. Set Bid and Evaluation Options
  a. **Sealed bid** - **will always default to Yes.**
  b. **Cost Per Quality Point and Best Value** – this allows scoring calculations within the system based on a percentage of cost and technical points. Great option to use for eRFPs with simple cost evaluations (total cost that can be captured in a single line item). **Recommend set to Yes.**
  c. **Best Value –** assigns weight to quality (technical) and price (cost). **Recommend set to Yes. Use slider scale to assign percentage allocation for technical and cost.**
  d. **Use Panel Questionnaire** - allows for scoring and collection of comments on suppliers' technical proposals. **Defaults to Yes.**
  e. **Auto Score** (OPTIONAL) - allows buyer to set automatic points per question. Beneficial to use if there are specific questions that you want to call out an automatic response to in evaluations. <u>Not</u> applicable when using evaluation team. **Recommend default to No.**
  f. **Cost Analysis** (OPTIONAL) – allows for the calculation of monetary implications of supplier's answers to questions. **Recommend default to No.**
  g. **Alternate Items** – allows bidders to suggest alternate items to those required on the event. Not generally applicable to RFPs. **Recommend default to No.**
  h. **Confidential Pricing** (OPTIONAL) - Confidential is displayed when the user is not allowed to see the prices on items or on supplier responses. If you are using the Panel Questionnaire option, then select "yes" so that cost is <u>not</u> disclosed to the evaluation team. **Recommend select Yes.**
NOTE: The event creator manages which users can see prices. If you believe that you should be able to see prices on the sourcing event, then contact the event creator for further assistance.	

Complete Event Set-Up

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.

   c. <u>Please be sure to include state entity's full name in the description</u>.

   d. Restrict Buyer Notifications set 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.
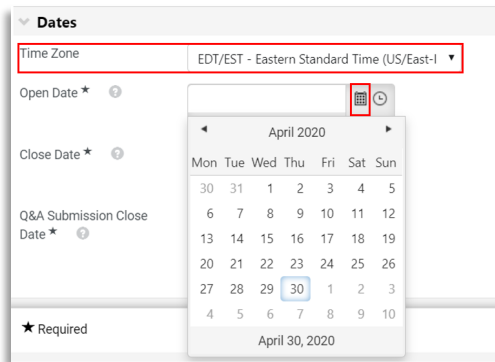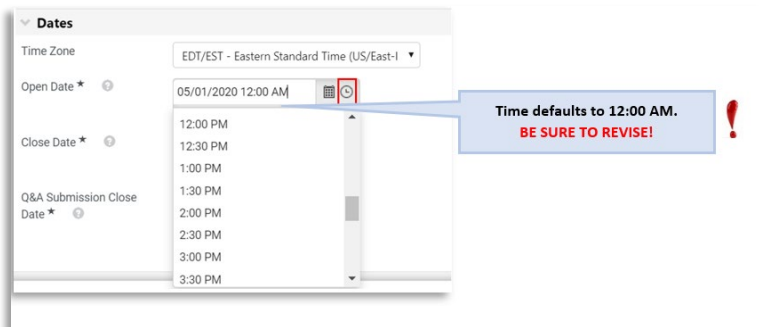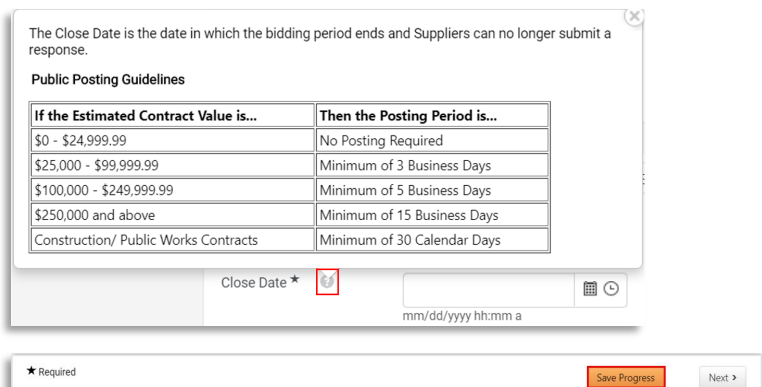
13. Identify Posting Dates

   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. Click "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: Click the ⍰ symbol for Close Date to view the posting guidelines based on dollar value.

TIP #2: *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

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

are invalid or do not meet the minimum posting period.	

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.	

15. Enter 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 Posted (e.g., 2020, 2021, etc.)
   c. For Purchasing Type, select from drop-down list
   d. Select Category Type from drop-down list
   e. OPTIONAL: enter state entity's website address in the URL field	

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"	
17. (IF OFFEROR'S CONFERENCE WILL BE OFFERED) Enter Conference Details a. Click Calendar to Select Offerors Conference Date b. Type Conference Start Time using the following format: HH:MM AM/PM c. Enter Conference Location (Building Name, etc.) d. Enter Street e. Enter City f. Select State from Drop Drown g. Enter Zip Code h. Enter any additional information any comments section i. Select "Save Progress" j. Select "Next" **NOTE:** This information is transmitted and displayed on the Georgia Procurement Registry (GPR) as part of the public notice. **It is not visible on the event itself.** The issuing officer must also include offerors' conference information by publishing **SPD-SPR010 Bidders/Offerors' Conference Announcement** in the Buyers' Attachment section.	Offerors Conference Date ___ 📅 mm/dd/yyyy Offerors Conference Time ___ ▼ Offerors Conference Location ___ Offerors Conference Street ___ Offerors Conference City ___ Offerors Conference State ___ ▼ Offerors Conference Zip ___ Offerors Conference Comments ___ 2000 characters remaining ★ Required ‹ Previous Save Progress Next ›

18. 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 users as "Stakeholders" that will have access to view the event and supplier responses (e.g. CUPO, other buyer, or any other individual that is set up to "view events", etc.)
    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.
	Users Event Actions ▼ History ?
	ⓘ Sourcing Events have a limit of 500 users per Role, Department or Business Unit for notifications and e-mails. When the limit is exceeded, sourcing events can still be created and executed but not all users will receive notifications and e-mails.
	Event Creator ★ SPD Admin, Mary
	Event Owners ★ Event Owners have full control over this event: 👤 Edit Users
	   SPD Admin, Mary
	Event Managers on this Entity Name have full control over this event:
	Department: 40199 (State Purchasing Division (SPD)) (11 users)
	Contacts ★ Contact information for these users is shown to suppliers: 👤 Edit Users
	   SPD Admin, Mary
	Stakeholders Stakeholders can view the event and responses: 👤 Edit Users
	   No User Selected
	Stakeholders on this Entity Name can view the event and responses
	
	Add Users ✕
	Individually by User Name, User Name, Email 🔍
	   Save Changes Close
	
	★ Required ‹ Previous Save Progress Next ›

19. Event Description

    a. If the eRFP template was selected during event set-up, then the tool prepopulates standard text. Review "Instructions to Issuing Officer", edit text, and then delete notes

    b. Otherwise, please add text to describe your solicitation.

    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 displays on the Georgia Procurement Registry

20. Stage Description

    a. Not applicable during event set-up. This should be left "blank"

    b. Select "Save Progress"

    c. Select "Next"

NOTE: After the eRFP closes, the buyer can create additional stages of the event (for example, to conduct rounds of technical or cost negotiations). When creating the new stage, the buyer will be prompted to assign stage names and descriptions to differentiate. Reference the ***Conducting Stages Quick Reference Guide*** for additional instructions.

21. Review and Edit Event Prerequisites

    a. If the eRFP template was selected during event set-up, then there will be standard Prerequisites already added to the Event. If there is need to add additional Prerequisites just follow the steps below.

    b. Click "Add Prerequisite" and select from the following:

        i. Select "Add New Prerequisite" (to create custom prerequisite)
          OR

        ii. Select "Add from Library" (to choose from pre-approved prerequisites)

TIP: Suppliers must acknowledge/respond to prerequisites (either before accessing the event or

Two Prerequisite Types:

Complete Event Set-Up	
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 Enter Bid 🔒 Required to View Event

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
	Prerequisites
	Add Prerequisite ▼
	  Add New Prerequisite
	  Add from Library
	
	Add Prerequisite ✕
	Instructions to supplier *
	1000 characters remaining
	Prerequisite Content * Enter text directly (or copy and paste) ▼
	  Enter text directly (or copy and paste)
	Type * Attach file
	
	Type * Optional ▼
	Certification Text * Optional
	  Required to View Event
	  Required to Enter Bid
	
	Certification Text * I certify that I have read and agree to the terms above.
	444 characters remaining
	☐ Supplier Must Also Upload a File
	▼ Hide Display Position Options
	Display Order * Last ▼
	* Required Save Changes Close

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"
	Prerequisites
	Add Prerequisite ▼
	  Add New Prerequisite
	  Add from Library
	
	Add Prerequisites from Library ✕
	Choose Where to Add From
	Library * Type to filter... 🔍
	▸ Show Display Position Options
	* Required Add Selected Prerequisites Close
	
	Select Values ✕
	🔍
	Name
	GA Library Select
	Selected Value
	No Value Selected
	Close

22. Add File 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 eRFP template within Jaggaer Sourcing Director, there is no need to separately attach SPD-PS016 State Entity eRFP Template
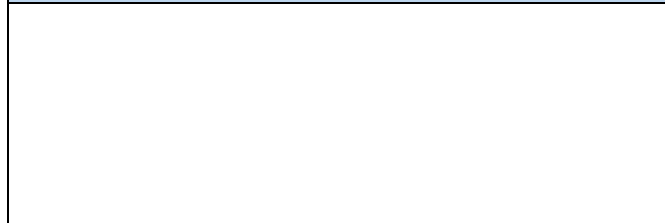
23. Supplier Attachments
   a. Observe that all event types are set up to allow suppliers to upload attachments
   b. Click "Next"	
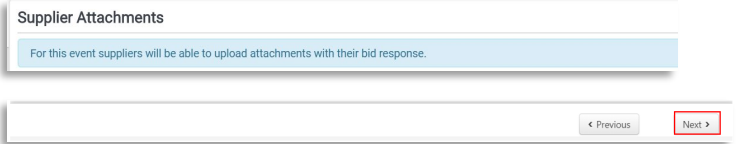
24. Event Questions
   a. **RECOMMENDED:** To allow suppliers to answer questions directly within the Sourcing Tool, add event questions.
   b. When using the template, the tool will prepopulate standard questions.
   c. To add event questions, you can use any of the following options:
      i. Select "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 Jaggaer system template for importing questions
      iv. NOTE: If the eRFP 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 "Groups" and, on each Page, into "Pages".
      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"
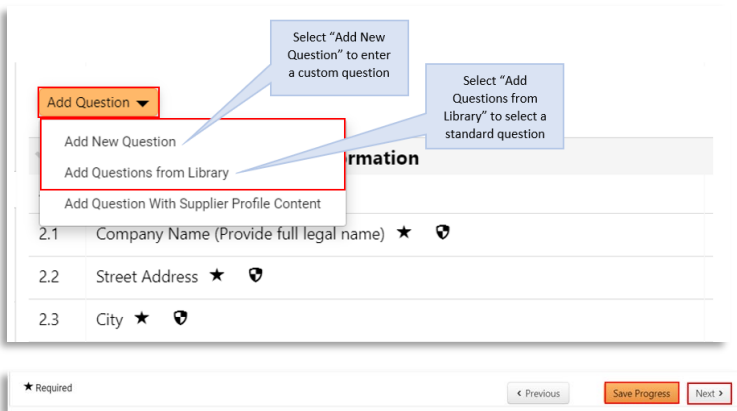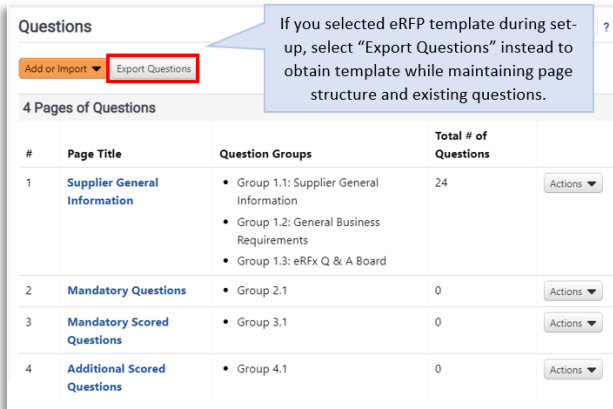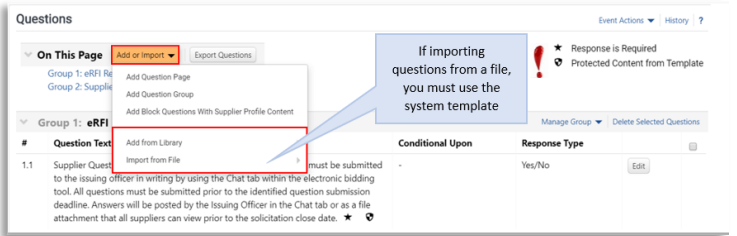	
	See Example Below for Questions Organized by Page and Group

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 using SPD-SP057 Requirements Sheet for RFPs or Scored RFQCs.

TIP #1: Review the *Import Event Questions Quick Reference Guide* for additional instructions.

TIP #2: Use the "Pages" and "Groups" options to organize your questions. Organize question types into separate pages. For example, create a separate page for each of the following: mandatory, mandatory scored and additional scored. Use groups to organize questions by content area (for example, supplier experience, security requirements, etc.)

25. **Create Event Line Item(s)**
    a. **IMPORTANT: To allow contract award, every eRFP must include at least one price component item.** Lines may be created on the Product Line Items tab, Service Line Items tab or both.
    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: The buyer may attach a file at the line item level if desired. However, the file may be overlooked by suppliers. If a cost worksheet will be used, it is recommended to attach it in the Buyers Attachments section to increase visibility.

IMPORTANT: the dollar value entered by the supplier(s) selected for contract award will be used to determine the Notice of Intent to Award (NOIA) posting period (protest count down) on the Georgia Procurement Registry (GPR). Therefore, buyers should never instruct suppliers to enter $1 in the total cost line item as this will generate an inaccurate NOIA posting period.

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

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26. **Additional Item Fields (OPTIONAL)**
    a. **NOTE:** Additional Item Fields are line item-specific questions. 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

‹ Back to Results   1 of 86 Results ▾ ‹ ›

Test eRFP for Best Value Function
40199-eRFP-000000357-2020

Type: Request for Proposal
Event Status: Draft

Settings and Content ▾

Setup ✓
  Additional Event Details ✓
Users ✓
Description ✓
Prerequisites 5
Buyer Attachments 2
Supplier Attachments ✓
Questions 15
Additional Item Fields
Price Components
Items 1

Additional Item Fields

Additional Item Fields are line-item-specific questions. These questions are directly related to the product (or s... section, which are not line item specific. An example may be "Provide the Manufacturer's name" or "Made in th... visible/ answered by the supplier. Additional Item fields are unnecessary if your event does not contain Line Ite...

Create Additional Field ▾
  Create Additional Field
  Add Field From Library

Add Additional Item Fields from Library

Choose Where to Add From

Library *

GA Library

› Show Display Position Option

★ Required Add Selected Item Fields Close

   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 (previous step) before adding additional item fields.

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27. View Suppliers Invited by NIGP 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

 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.

Complete Event Set-Up

28. Invite Additional Suppliers
   a. Select the "Add Suppliers to Event" tab to invite additional <u>registered</u> suppliers by search
      OR
   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. <u>As the State has not adopted NAICS codes, this search feature will not work to find *In Network* suppliers</u>.

29. 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. If there is workflow surrounding the event, Approval Steps can be viewed by clicking "View Approval Steps"
   e. 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.
   f. 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/

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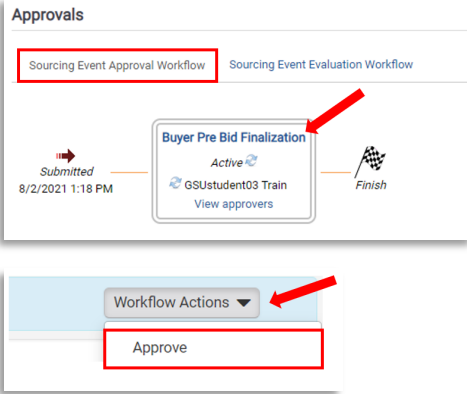
Complete Event Set-Up	
31. Email Notification to Supplier Once the event is Open, email notifications will be sent to all invited suppliers. The email will include a link to view the event. Interested suppliers may elect to respond. To submit an electronic bid, suppliers will be prompted to create an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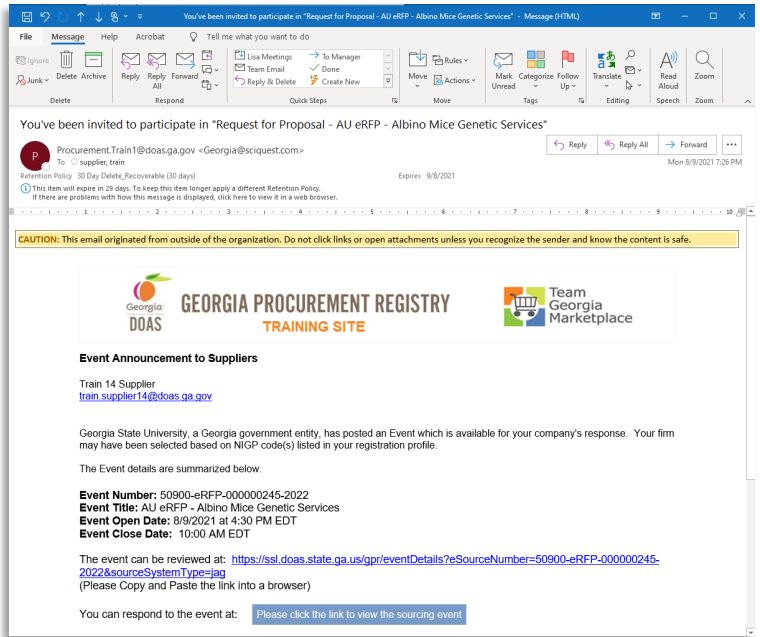
Managing Question and Answer (Q&A) Board
Review the ***Managing Q&A Board Quick Reference Guide*** for additional instructions.

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.	
1. Access Website to Sign In a. Open up a web browser	

Viewing Supplier Progress in "Open" Status	
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"	

3. **Access the Sourcing Menu**
 	
    a. Navigate to Sourcing Menu Icon
    b. Select "Sourcing Events"
    c. Select "Sourcing Events Home"	
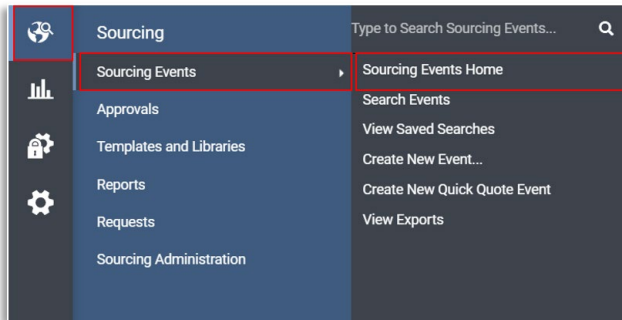
4. **Search for Event**
    a. View the Sourcing Event Summary table
    b. Choose the preferred sorting feature from the "View Sourcing Events By" drop-down menu
    c. From the search results, find and click on the "Event Number" to select the event	
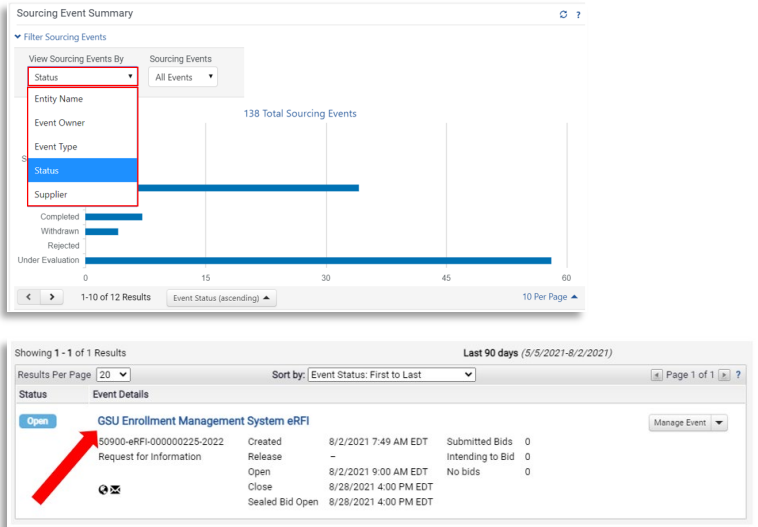
Viewing Supplier Progress in "Open" Status	

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.	

Conducting Evaluation 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	

Conducting Evaluation Activities	
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.

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

Conducting Evaluation Activities

NOIA/NOA, the buyer must list all unsuccessful suppliers and the reason each supplier was not selected for award.

6. **Conduct Technical Scoring**
   a. Once administrative review is completed, the issuing officer may convene the technical evaluation team and start the technical evaluation process.
   b. **RECOMMENDED:** If the technical evaluation team will score directly within Jaggaer Sourcing Director, then review the ***Panel Questionnaire (Technical Scoring) Quick Reference Guide*** for additional instructions.
   c. Otherwise, following the directions in Step 4 above to export out all technical responses. Be sure to delete all suppliers' cost. Utilize the SPD-approved resources including, **SPD-EP007 Supplier Technical Evaluation, SPD-EP013 Master Technical Evaluation Template, etc.**

Panel Questionnaire Menu
- Set **total points** for technical
- Review and Confirm **Rating Scale** (Poor - Excellent)
- Identify **Questions to be Scored**
- **Assign Point Values** per Question
- Identify **Evaluation Team Members** (must be finalized before evaluation begins)
- Identify **Evaluation Assignments** (All Questions, Group 1 only, etc.)
- **Publish Panel** (only available once event closes)

7. **Conduct Cost Scoring**
   a. Separate from the technical evaluation, the issuing officer may review the submitted cost responses and conduct scoring.
   b. **NOTE:** If selected during event set-up, the system will assign a cost score (using the % points allocated for price) based the suppliers' total cost within the system. This feature must be used in combination with the **"Best Value"** selection during Event set-up and the use of the **Panel Questionnaire for technical scoring**.
   c. To view the assigned cost score:

Conducting Evaluation Activities	

i. Select the "Evaluations" menu and "Supplier Responses"
 	
    ii. Click the check box to the right of each suppliers' name and select "Evaluate Selected Responses"
 	
    iii. Observe that point scores will show as "pending" until the technical scoring is completed.
 	
    iv. Once technical scoring is completed through the Panel Questionnaire repeat the steps above to access the evaluation screen.
 	
    v. **IMPORTANT: disregard the "Cost Per Quality Point".** This calculation is not consistent with SPD's standard cost scoring process where the lowest priced proposal receives all available cost points.
 	
    vi. Observe that the "Best Value Score" is the <u>total</u> of the supplier's technical score plus cost score.
 	
    vii. Observe that the Average Questionnaire Rating is the assigned technical score.
 	
    viii. To calculate the cost score, subtract the "Average Questionnaire Rating" score from the "Best Value Score". In the example show, Greater Images of Atlanta's cost score is 300 points (740 – 440 = 300).
 	
  d. If the total cost as entered into the system will not be the single factor for cost evaluation, then the issuing officer should conduct cost evaluation scoring separately.	

8. Selecting Supplier(s) for Award
 	
  a. Once all evaluation activities are completed and the issuing officer is ready to select the top ranked supplier(s), complete the following steps.
 	
  b. Select all supplier responses and then select "Evaluate Selected Responses".
 	
  c. OPTIONAL: To assist in identifying the best award, the buyer may view different scenarios for award (will vary based on event type).	

Conducting Evaluation Activities

i. Other options may also be available based on the buyer's choices during event set-up.

ii. Scenarios can be saved by evaluators and viewed by managers for comparison.

d. When the buyer is ready to select suppliers for award, the buyer should:

i. Check the box for "Total Bid" or select the specific cost line items to be awarded

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

iii. Select from available choices

iv. Observe that the selected supplier will include the designation "Pending Award".

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

vi. If correct, the buyer should select "Finalize Award"

vii. In the pop-up box, enter the Scenario Name (for example, Notice of Intent to Award or Notice of Award as applicable)

viii. Click "Save and Finalize"

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

9. Manual NOIA Process

NOTE: the NOIA process is required for all awards of $100,000 or more. For less than $100,000, the NOIA is strongly recommended; however, the buyer may proceed to NOA (see next step).

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. Upload a NOIA document related to the Event and select "Save Changes"

e. Observe the file now appears in the Attachments section. Next, click the drop-down menu for "Edit" and choose "Publish"

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

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

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

i. Send a courtesy email to all suppliers alerting them that the NOIA has 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.

10. Award Process/Notice of Award

    a.   On right side, click on the "Workflow Actions" dropdown and select "Approve"

    b.   Observe the Event is now in Awarded status

    c.   On the left navigation click on "Tools" to expand and select "Award Notifications"

    d.   Under Public Site Award Attachments, click on "Add Attachments"

    e.   Upload the NOA document related to the Event and select "Save Changes"

    f.   Observe the file now appears in the Attachments section. Next, click the drop-down menu for "Edit" and choose "Publish"

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

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

    i.   Repeat the steps above to add and publish any additional files, such as SPD-EP002

Sample Bid Evaluation Template (if not already completed during NOIA stage)

j. Verify status of your event on the GPR and send courtesy emails to suppliers following the tips below.

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 NOA has been published. 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"

Conducting Evaluation Activities

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