

CREATE

1. Find the Master Contract

- “Contracts” > “View Current”
- Use the filters to find the desired master contract:
 - Organization = ALL
 - Status = Active
 - Content = Master Contracts

Current Contracts

Contractor: [] Organization: ALL Contract Admin: ALL Status: Active Content: Master Contracts

Commodity: [] Authorized Organization: ALL Contract Title: [] Contract Number: []

Submit Reset

Additional filters can be used - ex., keywords in the “Contract Title” and or search by “Contract Number” if you know the number

- Click the Contract # hyperlink you want to use

Contract #	Title	Contractor	Organization	Buyer	Effective Date	Expiration Date	Status	Actions
MPA-600 AL	IT Services	Master Contract	State of Rhode Island	Alexandra Laflamme	May 07, 2019	May 07, 2021	Active Do not dispatch	⋮
MPA-600 AS	IT Services	Master Contract	State of Rhode Island	Andrea Smith	May 07, 2019	May 07, 2021	Active Do not dispatch	⋮

Note - MPAs are always listed with “State of Rhode Island” as the organization

- At the bottom of the Contract Summary page, click the “Create Solicitation” button

Create Solicitation Copy Close

- When prompted, select the “Informal Solicitation”

Please select the type of Solicitation document that you would like to create:

Formal Solicitation

Informal Solicitation

Create

2. To create the solicitation, progress through the indicated header tabs


Header Requirements Questionnaire Attachments Item Specs Suppliers Summary

3. Create the solicitation header

- Select **MMB – MPA Mini Bid** as solicitation type
 - Solicitation number is prepopulated based on solicitation type and always starts with the letters of the Solicitation type
- Title should always start with name with searchable commodity referenced first. (Ex., Small Construction DOA 4th Floor Bathroom Remodel)
 - Change default “Solicitation from Contract - #” to what is more appropriate to the mini bid
 - Do NOT use special characters or all caps.
- Calculate Estimated value – Leave **NO**

- Estimated Value – Enter a value. This is internal field for workflow review/reporting. The vendors/public will never see this.
- Description should be easily understood by both public and vendor. This will be on the public bid board.
 - Do NOT use special characters or all caps.
- Justification – This field is for internal comments to your workflow approver(s) if needed prior to posting solicitation
- Solicitation Contact – should be the agency user performing the mini bid (not a Purchases buyer)

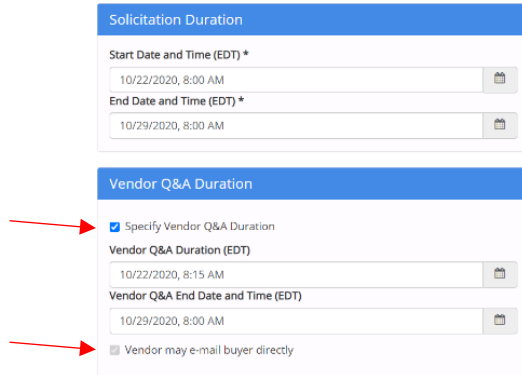
Solicitation Contact *
Find a Contact
Buyer One Capitol Hill 2nd Floor Providence RI, 02908 United States Tel: (401) 574-XXXX Fax: buyer1@purchasing.ri.gov

- Restricted Access – Leave as **NO** (this restricts user access, does not restrict vendor invitation)
- Solicitation Categories will be selected based on those specified in the contract (do not edit)
- Delivery and payment terms are prepopulated. – Leave as is
- Custom Fields are bid specific and should be selected and filled in according to individual solicitations needs. The custom fields have a rich text editor which can be expanded or collapsed for ease of editing using the icon 
 - Pre-Bid Conference- if Yes,
 - Select the checkbox for Pre-Bid Conference.
 - Select the checkbox for either the “Non-Mandatory” or “Mandatory” field depending on your requirements.
 - Select the checkbox and update the “Pre-Bid Conference Details” with the date, time, location
 - Bonding – Select any of the applicable checkboxes for the listed bonding types
 - Contract Term – Check the checkbox and update the field with the approximate start date, # of years and any renewal periods (if applicable)

4. Solicitation/Q&A Duration

- *Solicitation Duration* – **Must** be posted for a **MINIMUM of 1 week**
 - Start date will default to next date unless you preselect a date and time
 - End date will default to one week unless you preselect a date and time
- *Q&A Duration* –
 - Specify Q&A Duration – check box if you want vendors to be able to submit questions
 - Q&A Start Date begins 15 minutes after bid opens unless specified

- Q&A End Date defaults to 1 day prior to bid closing, this must end 2 days prior to the bid closing. Keep in mind to provide vendors enough time to ask questions and your agency to respond to those questions. Post responses no later than 1 day prior to bid closing.
- Uncheck – “Vendor may email buyer directly”



The screenshot shows two sections: 'Solicitation Duration' and 'Vendor Q&A Duration'. The 'Solicitation Duration' section has 'Start Date and Time (EDT) *' set to 10/22/2020, 8:00 AM and 'End Date and Time (EDT) *' set to 10/29/2020, 8:00 AM. The 'Vendor Q&A Duration' section has 'Specify Vendor Q&A Duration' checked, 'Vendor Q&A Duration (EDT)' set to 10/22/2020, 8:15 AM, and 'Vendor Q&A End Date and Time (EDT)' set to 10/29/2020, 8:00 AM. A checkbox for 'Vendor may e-mail buyer directly' is unchecked. Red arrows point to the 'Specify Vendor Q&A Duration' checkbox and the 'Vendor may e-mail buyer directly' checkbox.

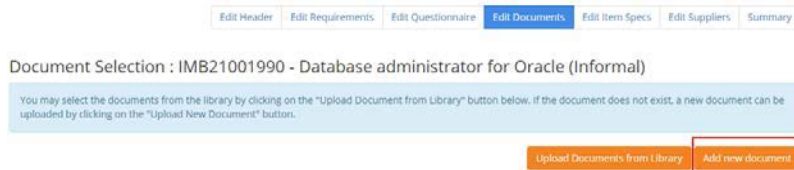
5. Complete “Requirements”

- Select all that are appropriate clauses for your specific bid
 - Note that if Prevailing Wage is applicable, select the checkboxes for both Prevailing Wage options (one field is for vendor instruction and the other is for the vendor to upload their response)
 - Remember you can use the text editor to enlarge the page

6. Skip Questionnaire – select “Next Step” to advance to the next tab

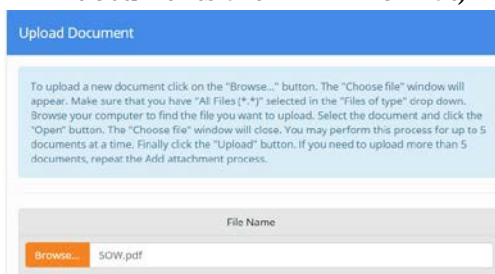
7. Complete “Attachments”

- Click the “Add New Document” button to upload any required documents for the bid



The screenshot shows a navigation bar with tabs: 'Edit Header', 'Edit Requirements', 'Edit Questionnaire', 'Edit Documents', 'Edit Item Specs', 'Edit Suppliers', and 'Summary'. Below the navigation bar, the text reads 'Document Selection : IMB21001990 - Database administrator for Oracle (Informal)'. A light blue box contains instructions: 'You may select the documents from the library by clicking on the "Upload Document from Library" button below. If the document does not exist, a new document can be uploaded by clicking on the "Upload New Document" button.' Below this box are two buttons: 'Upload Documents from Library' and 'Add new documents'.

- Select the applicable documents from your saved files and then select upload (make sure all documents are in PDF format)

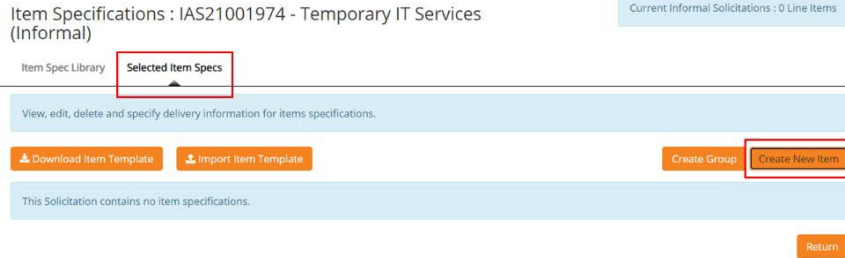


The screenshot shows the 'Upload Document' screen. It includes a blue header with the text 'Upload Document'. Below the header is a light blue box with instructions: 'To upload a new document click on the "Browse..." button. The "Choose file" window will appear. Make sure that you have "All Files (*.*)" selected in the "Files of type" drop down. Browse your computer to find the file you want to upload. Select the document and click the "Open" button. The "Choose file" window will close. You may perform this process for up to 5 documents at a time. Finally click the "Upload" button. If you need to upload more than 5 documents, repeat the Add attachment process.' Below the instructions is a 'File Name' field with a 'Browse...' button and the text 'SOW.pdf'.

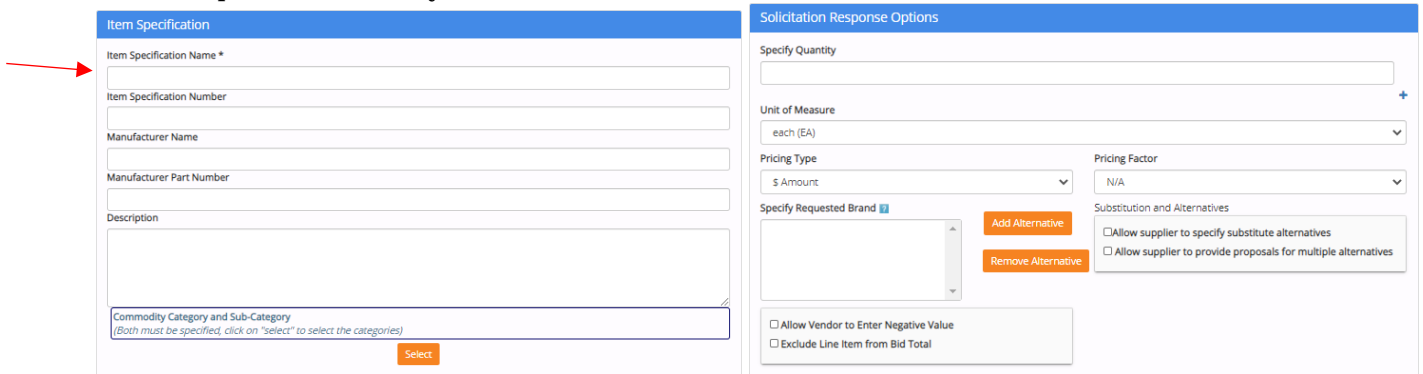
Note - If you need to delete a file; uncheck the line and click “Previous Step” to previous tab > click “Next Step” to advance back to the “Attachments” tab> should now remove the line

8. Item Specs

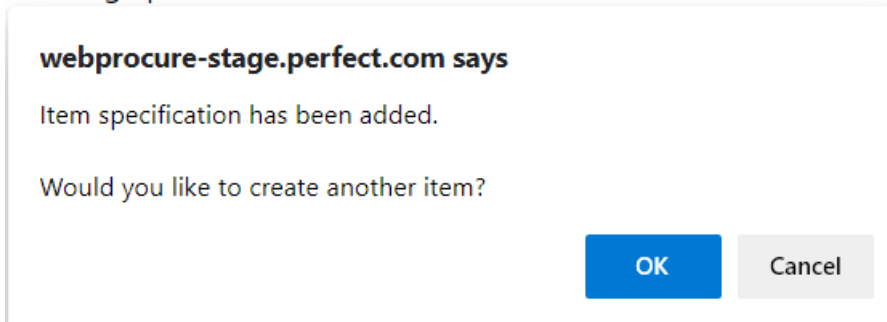
- Line items describe the goods or services for which vendors will provide pricing. The items will depend on the nature of the bid, and the instructions included in the user guide of the contract.
- You can create your own line item(s) by clicking “Create New Item”



- To create your line item(s), fill in the required fields in the “Main Item Fields” screen. The “Item Specification Name” should briefly describe the item to be quoted, and you can include a longer description if necessary.



- A commodity category must be selected for each item
- Quantity must be specified for each item
- Unit of measure defaults to “each (EA)”; click the down arrow to select an appropriate unit of measure.
- When all applicable fields have been completed, click “Save”
- A pop-up will appear, asking if you want to create another item. Select “OK” or “Cancel” depending on the number of line items there are for the bid.



- For more details, navigate to the following topic in online Help: *Solicitations » Informal Solicitations » Create Informal Solicitation » Item Specs*
- Select “Next Step” to advance to the next tab

9. Suppliers

- Review the suppliers that will be able to respond to the solicitation. Since the mini bid is being created from an MPA Master Contract of MPA pre-qualified vendors, these vendors will automatically be invited to participate in the mini bid. Only and All the applicable qualified MPA vendor(s) shall be invited to participate in the mini bid. *Never add any additional vendors outside of the MPA or delete any MPA qualified vendors from the list.*

- Note – Some MPAs have different types of vendors on the qualified list that may not be qualified for the specific mini bid. (Ex, Small Construction may have plumbers and electricians, yet the mini bid is for a plumbing project. The vendor invite list will go to all vendors on the MPA. If you receive a bid from a vendor that cannot meet the scope of work’s requirements, still include them in the evaluation and make note in your award determination as to why they did not meet the mini bid qualifications.

10. Summary

- Review all the sections of the solicitation
- Click the “Edit” button on any section to make changes
- Click “Approval Preview” button to view pre-issue workflow. You may add reviewers or approvers here.
- “Submit” if you want to activate and post the solicitation to the Bid Board – or “Close” if you want to save and come back later

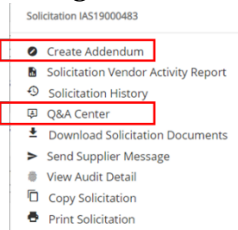


ADDENDUM AND Q&A

11. Managing Solicitations –

Addendum

- Select “Solicitations” > “Informal” > “View Current” to find your solicitation
- Select the action buttons on the right of each listing. You may edit your solicitation while the status is ‘Un-Issued’ or ‘Approved’. Approved bids that have gone active will required an addendum to be changed. Select “Create Addendum”



- Once the draft addendum has been started, you can edit most sections of your solicitation and submit for approval from the Summary screen. For more details, navigate to the following topic in online Help: *Solicitations » Informal Solicitations » View Current Informal Solicitations » Create Addendum - Active Informal Solicitation*

Q&A Center

- Once the Q&A Duration is active, you may select “Q&A Center” from the action menu to review and respond to questions from vendors. For more details, navigate to the following topic in online Help: *Solicitations » Q&A Center*
- Vendors **shall** submit all questions through the OSP Q&A Center and agency user **shall** respond accordingly in the Q&A Center. **No** email, phone calls, etc. for Q&A correspondence.
- Questions can be answered as they come in or after the Q&A duration ends using the Q&A Center.

REVIEW AND AWARD

12. Review and Award

- Select “Solicitations” > “Informal” > “Review/Award” to navigate to the listing screen and find your bid
- From the solicitation action menu, select “Solicitation Vendor Activity Report” to review vendor activity at any time

Show Vendors who have Viewed Solicitation Show All Vendors

Check All Uncheck All

Show All entries Search:

Select	Vendor Name	Solicitation First Viewed	Document(s) Accepted	Last Document Download Attempt	Addenda Viewed	Addenda Accepted	Addendum Document(s) Accepted	Last Addendum Document(s) Download Attempt	Submitted Response
<input type="checkbox"/>	JP Johnson Inc Quote 1	Sep 22, 2020 2:45 PM EDT	No Documents Available	No Documents Available	Sep 22, 2020 2:45 PM EDT [3 OF 3]	No Addenda Accepted Available	Sep 22, 2020 2:46 PM EDT [2 OF 3]	Sep 22, 2020 2:46 PM EDT	Sep 22, 2020 2:50 PM EDT 📄 = 1
<input type="checkbox"/>	MGE ENTERPRISES Quote 1	Jul 08, 2020 9:51 AM EDT	No Documents Available	No Documents Available	Sep 22, 2020 11:42 AM EDT [2 OF 3]	No Addenda Accepted Available	✘	✘	Jul 08, 2020 9:52 AM EDT 📄 = 1
<input type="checkbox"/>	Rhode Island Test Vendor Quote 1	Jul 21, 2020 7:53 AM EDT	No Documents Available	No Documents Available	Jul 21, 2020 7:53 AM EDT [2 OF 3]	No Addenda Accepted Available	Jul 21, 2020 7:53 AM EDT [2 OF 3]	✘	Jul 21, 2020 7:55 AM EDT 📄 = 1

- Select “Evaluate Supplier Responses”

Solicitation MB19000217

- Evaluate Supplier Responses
- Solicitation Vendor Activity Report
- Finalize Award
- Solicitation History
- Cancel Solicitation
- Q&A Center
- Award Report
- Modify Published Award Report
- Download Solicitation Documents
- Send Notification to Suppliers
- View Audit Detail
- Copy Solicitation
- Print Solicitation

- From the Evaluate and Award screen, you may perform the following actions:
 - “Review Vendor Documents” - to review supplier attachments, if you requested any
 - “Award by Item” or “Award All to One for Bid” (most common)
 - “Export Bid Tab” – Download and save an Excel file with supplier response data (useful if multiple line items). Save for final award phase.

Score Questions

Provide numeric score to supplier responses to be used in the evaluation process.

Review and Score Questions

Select the award method from the options listed below and review the supplier documents.

Select Award Method

Review and/or download documents and attachments submitted by suppliers as part of their response.

Review Vendor Documents

Awarding by item allows the evaluation and comparison of vendor responses at the item level. Line item delivery information is available utilizing this style.

Award By Item

This award method requires that responding suppliers have responded to all items in this informal Solicitation. Any suppliers not responding to all items will not be displayed.
Note: Line item level delivery information cannot be displayed using this method.

Award All to One For Bid

Continue Manage Evaluation Committee Export Bid Tab Cancel

- From the Award screen (example below is “Award All to One”), select the low bid, and Click “Done”.

Select	Bid Total	Evaluated Bid Total	Supplier	Document	Alternative Proposals	Actions
<input type="checkbox"/>	\$11,000,000,000	\$11,000,000,000	MGE ENTERPRISES (n/a)			⋮
<input checked="" type="checkbox"/>	\$10,000,000,000	\$10,000,000,000	MGE Construction (n/a)			⋮

Do not award this Solicitation now Award to Multiple Suppliers

- Review the “Award Report” on the next screen, add comments on award determination and click “Done”.

Awarded Items and bid Winners

No.	Item	Supplier	Brand	Prod. No.	Manufacturer Name	Manufacturer Part Number	Delivery Date	Unit Bid	Total Qty	Awarded Item Qty	Item Total	Evaluated Item Total
1	1. ProGuard LI 3 Cordless Vacuum Specification Number : 1	MGE ENTERPRISES						\$2,390.000000	1,000	1,000	\$2,390.000000	\$2,390.000000
2	2. ProTeam 1.5 Gal. Cordless Backpack Vacuum Specification Number : 2	MGE ENTERPRISES						\$1,890.000000	2,000	2,000	\$3,780.000000	\$3,780.000000
3	3. Item 3 Specification Number : 3	MGE ENTERPRISES						\$3,275.000000	3,000	3,000	\$9,825.000000	\$9,825.000000

Awarded

[Evaluation Notes](#)
[Download](#)
[Print](#)
[Export Bid Tab](#)
[Done](#)

- OFFLINE – Issue your “Tentative Selection Letter” to your vendor(s) selected for potential award.
 - Collect the required documentation. Upload to the “Manual Audit Trail” (internal file and comment repository)
 - From the “Actions” menu, select “View Audit Detail”
 - Click “Create Manual Audit”
 - Document the tentative selection and attach a copy of the letter to the vendor with the final documentation received from the vendor

The screenshot displays the Manual Audit Trail interface. On the left, a table shows workflow items:

Workflow	Author	Description
Workflow Pre-Issue Submit	Michael Erell	The Solicitation was submitted...
Header	Michael Erell	Solicitation header was edited.
Header	Michael Erell	Section General Solicitation...

On the right, a modal window titled "Create Manual Audit" is open. It contains the following fields and elements:

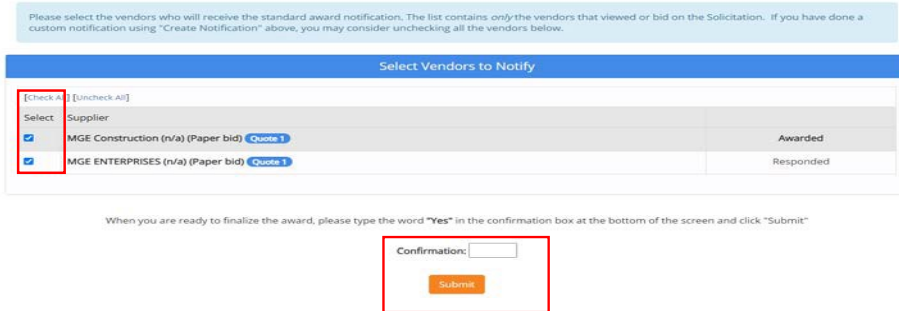
- Title:** Tentative award
- Description:** Tentative selection letter sent to MGE Enterprises
- Audit Document Table:**

Document Name	Description	Actions
Tentative Selection Letter.pdf	Tentative Selection - IMB21000675	[Actions]
- Buttons:** "Create Manual Audit" (highlighted in red) and "Close".

- Once finalized, return to OSP to complete the award process

Finalize Award

- Open OSP > “Solicitations” > “Informal” > “Review/Award” and find your solicitation. The status will be “Under Evaluation”
- Click "Submit for Pre-Award Approval", if you have received all of your tentative award documents.
- Once the award has been reviewed and approved by those in your workflow, the status will change to “Approved”. This may take a few days depending on your organization’s workflow and approver(s) timeliness.
- Open OSP > “Solicitations” > “Informal” > “Review/Award” and find your solicitation. Select “Finalize Award” from the action menu
 - “Check All” vendors for notification of award
 - Type “YES” in the confirmation box

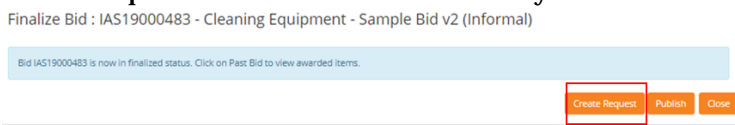


- o Click “Submit”
- o Click “Publish”
- o Select “Publish Custom Report”
- o “Next”
- o Set “Display any attachments provide by the responding Suppliers” toggle to “Yes”
 - One each vendor line, set their attachments toggle to “Yes” (Unless it’s marked confidential. Vendor will need to provide a redacted public version for posting.)
- o “Next”
- o Add the following statement: “[Insert vendor name(s)] has been selected for award.” **(This will only be viewable by invited vendors)**
- o “Next”
- o Attach the excel bid tab file saved earlier to the “Attach Documents” section > “Save”
- o Click “Show me how it looks” for preview of the report
- o “Close” > “Close” > “Close”

CREATE REQUEST AND PURCHASE ORDER

13. “Create Request” from Awarded Solicitation

- After finalizing the award in step 12, click on the “Create Request” button. The system will take you to the Request screen with the data from your awarded solicitation



- If you exit and come back to OSP, you can also start the request creation process by selecting “Solicitations” > “Informal” > “View Archived”. Search for your solicitation and click the solicitation # hyperlink, scroll to the bottom and click "Create Request" to begin the process.



14. After the request has been approved, a purchase order will be generated.

BUSINESS PROCESS CONSIDERATIONS

- Solicitation posting –
 - Agencies must invite all MPA qualified vendors listed on the contract
 - No more emailing/calling/etc. of vendors for quotes. All mini bid quotation activities shall be performed in OSP.
- Tentative Selection

- Use the “Tentative Letter of Selection” template on the Purchases website at <https://www.ridop.ri.gov/agency-resources/centralized-template.php>.
- AIA documents (if applicable) shall be counter signed by Purchases.
- Informal Solicitation
 - Mini Bids shall be designated as an “informal solicitation” **only**. All other solicitation types must follow their indicated solicitation processes. Any misuse of OSP solicitation types, processes and/or designations may result in Purchases modifying your agency’s permissions and/or configurations.