



---

# **Knowledge Transfer Program Manage and Submit Bids, Complex Purchases**

---

June 2009

# Ground Rules

---

## 🕒 Important Ground Rules

- Sign the attendance sheet
- Turn off your cell phones and pagers
- No email or internet usage during session

# Agenda

---

- ④ Discuss Complex Purchases
- ④ Redistribute Workload
- ④ Create Bid Invitation
- ④ Create Surrogate Bid
- ④ Accept and Create Purchase Order and/or Contract
- ④ Send E-mail Notification
- ④ Change Contract and Create Award Statement
- ④ Send Award E-mail Notification
- ④ ECC Reports



---

# **What is a Complex Purchase Bid Invitation?**

---

# When do I use SRM's bidding engine for Complex Purchases?

---



- Buyers will use complex bidding when the total value of the bid invitation is estimated to be greater than \$50,000.00

# Bid Invitations - Types

---

You can create the following types of bid invitations:

- 🌀 Best Value Bid
- 🌀 Fixed Price Bid
- 🌀 Invitation for Bid
- 🌀 RFQ – Qualification (Request for Qualification)
- 🌀 Request for Information
- 🌀 Request for Proposal



---

# Redistribute Workload

---

# Redistribute Workload

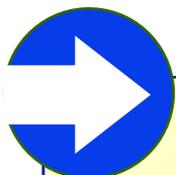
---

The “Redistribute Workload” transaction enables the Buyer to reassign the requirement to another Buyer either inside their agency or reassign it to ITMO/MMO so a bid invitation can be processed.

Use the Redistribution Workload transaction to manually assign the requirements to the purchasing group responsible for processing them.

# Demonstration

---



- ◆ Redistribute Workload

# Redistribute Workload

## Redistribution of Workload

Find Documents

Requirements    
  Purchase Orders    
  Bid Invitations    
  Contracts

Purch. Organization: SCEIS Purchasing Organization    
 Purchasing Group: 740 - Jamie Jackson    
 Status: In Process

[Start](#)   
 [Extended Search](#)   
 [Reporting Workload](#)

Results List

<input type="checkbox"/>	Doc.Type	Doc.no.	Description	Purch. Organization	Purch. Group	Status
--------------------------	----------	---------	-------------	---------------------	--------------	--------

  
 Assign Manually to

Title	uPerform Location	Purpose/Trigger
<a href="#">SRM Redistribute Workload (Bidding)</a>	Materials Management>Bidding>Help Content	This procedure is used to redistribute a requirement that is over a buyer's or agency's certification level.



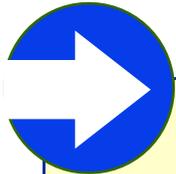
# Process Bid Invitation

---

# Objectives

---

- Upon completion of this lesson, you should be able to:
  - Take a requirement from Carry Out Sourcing and create a complex purchase bid invitation
  - Complete the bid invitation to procure certain goods or services
  - Send bid invitation email notification



- ◆ **Process Bid Invitation**
  - ◆ Carry Out Sourcing – Exercise 1
  - ◆ Process Bid Invitation – Exercise 2
  - ◆ Solicitation E-mail Notifications – Demo Only

# uPerform Documents



Title	uPerform Location	Purpose/Trigger
<a href="#">SRM Carry Out Sourcing (Bidding)</a>	Materials Management>Procurement > Bidding	This procedure is used when it is determined by the buyer that a bid invitation should be created.
<a href="#">SRM Process Bid Invitation (Bidding) Creating and Publishing a Bid Invitation</a>	Materials Management>Procurement > Bidding	Perform this procedure when the buyer has created a bid invitation number in Carry Out Sourcing and must finish creating the bid invitation in order to publish.
<a href="#">ZMM BUYER Buyer Main Menu (Bidding) Solicitation Email Notification</a>	Materials Management>Procurement >Bidding	Use this procedure to send out solicitation e-mail notifications.



# Create Surrogate Bids

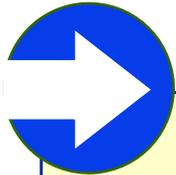
---

# Create Surrogate Bids

---

## What is a Surrogate Bid?

- Surrogate bid process is used when an agency accepts paper bids from a vendor. Because paper bids have to be entered into SRM, the buyer is responsible for entering the bids



- ◆ **Create Surrogate Bid**
  - ◆ Process Bid Invitation – Exercise 3

Title	uPerform Location	Purpose/Trigger
<a href="#">SRM Process Bid Invitation (Bidding) Surrogate Bidding</a>	Materials Management>Procurement >Bidding	Perform this procedure when you need to enter the vendor's bid information into the bid invitation.



---

# **Accept and Create Purchase Order and Contract**

---

# Objectives

---

- Upon completion of this lesson, you should be able to:
  - Evaluate bids
  - Accept bid
  - Create contract

# Creating Contract

---

- You will always create a contract for Complex Purchases. A contract must be created in order to issue an award statement.
- Option to Create Purchase Order:
  - You are ready to encumber funds for entire contract



## Accept and Create Purchase Order and Contract

- ◆ Evaluate and Award Bids – Exercise 4

Title	uPerform Location	Purpose/Trigger
<a href="#">SRM Process Bid Invitation (Evaluate and Award Bids)</a>	Materials Management>Procurement >Bidding	Perform this procedure when a bid invitation has closed and you are ready to evaluate the bids and make the award.



---

# **Change Contract and Create Award Statement**

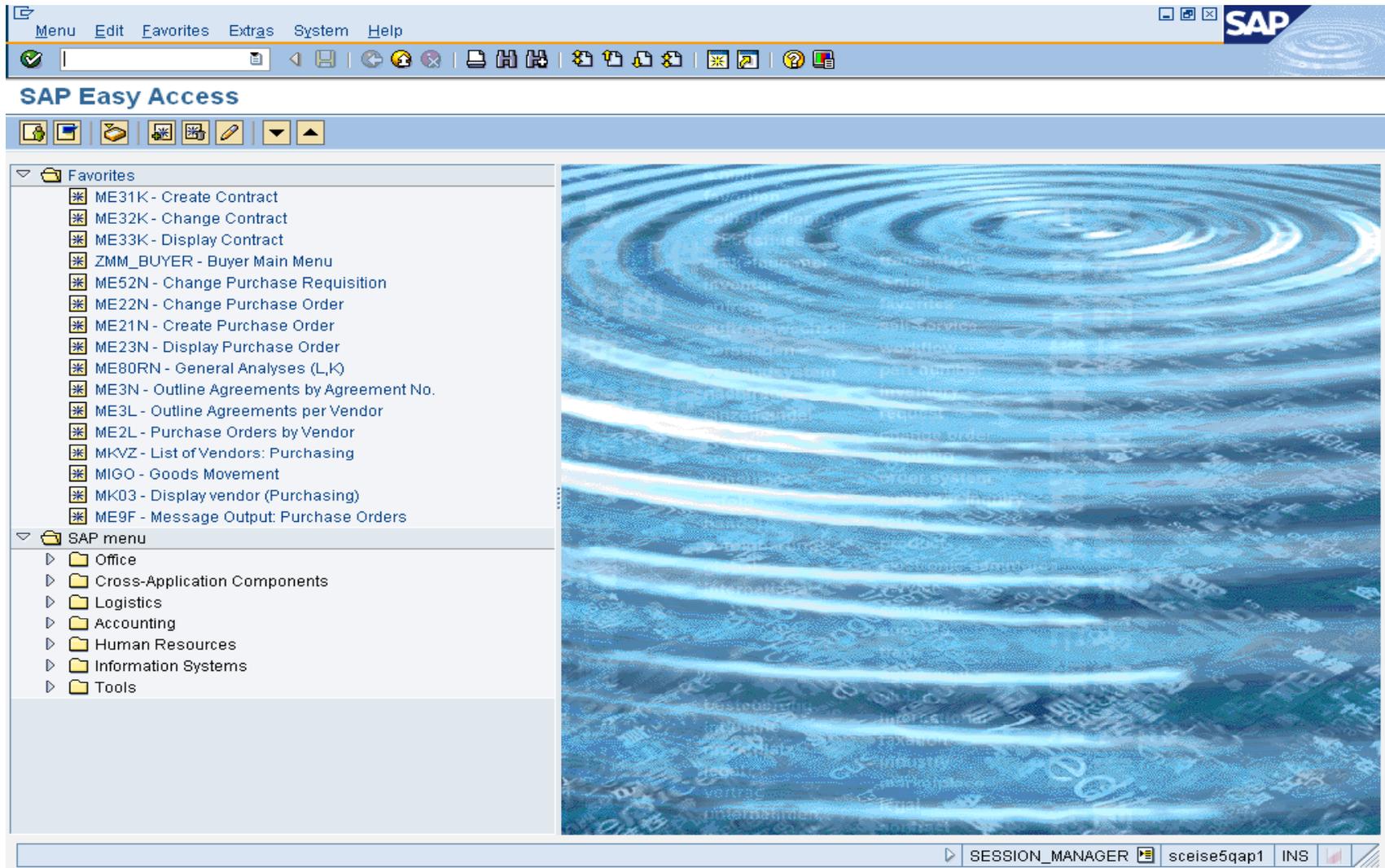
---

# Change Contract

---

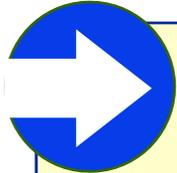
- All modifications of contracts are done in ECC
  - Log on to Citrix
  - Select Prod – ECC from the log on pad
  - Select Transaction ME32K

# ECC Initial Screen



# Demonstration and Exercise

---



- ◆ Create an Award Statement – Exercise 5
- ◆ Send Award E-mail Notification – Demo only

# Demonstration and Exercise

<b>Title</b>	<b>uPerform Location</b>	<b>Purpose/Trigger</b>
<a href="#">ME32K Change Contract (Bidding) Creating an Award Statement</a>	Materials Management>Procurement >Contracts	Perform this procedure when a contract and award statement should be created.
<a href="#">ZMM BUYER Buyer Main Menu (Bidding ) Email Award Notification</a>	Materials Management>Procurement >Contracts	Perform this procedure when you need to send award notification emails.



# Contract Reports

---

# Demonstration and Exercise

---



ME3N Purchasing Documents Per Document Number in ECC – Exercise 6

- ◆ ME80RN General Evaluations – Exercise 7
- ◆ ZMM\_BUYER Buyer Main Menu E-mail Notification Report – Exercise 8

# uPerform Documents



Title	uPerform Location	Purpose/Trigger
<a href="#">ME3N Purchasing Documents Per Document Number (Bidding)</a>	Materials Management>Procurement >Contracts	Perform this procedure when you need to search information on contracts.
<a href="#">ME80RN General Evaluations (Bidding) Vendor Report</a>	Materials Management>Procurement >Contracts	Perform this procedure when you need to run a detailed report on select purchasing fields from a contract.
<a href="#">ZMM BUYER Buyer Main Menu (Bidding) Email Notification Report</a>	Materials Management>Procurement >Contracts	Perform this procedure when you would like to run a report on bid invitation emails and award notifications.

# Next Steps: MM Breakout Sessions

---



*At DSS Training Center, Midlands Shopping Center, unless otherwise noted.*

## 🌀 Purchasing

- June 24, 2009 at 9:00 a.m. – 3:00 p.m.
- June 25, 2009 at 9:00 a.m. – 3:00 p.m. (repeat)

# Any Questions?

---

