



Manage and Submit Bids, Small Purchase Knowledge Transfer Program

June 10, 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 Small Purchases
- ④ Redistribute Workload
- ④ Create Bid Invitation
- ④ Create Surrogate Bid
- ④ Accept and Create Purchase Order and/or Contract
- ④ Modify Contract



What is a Small Purchase Bid Invitation?

Small Purchases – When do I use SRM's bidding engine?

- Buyers with Request for Quotations up to \$10,000 can attach quotes at the shopping cart level or attach quotes to the purchase order.
- Buyers with Request for Quotations may also use SRM's bidding
- Buyers with bid invitations in excess of \$10,000 will always use SRM's bidding

Small Purchases Bid Invitations



According to the SC Consolidated Procurement Code,

“Purchases over ten thousand dollars up to fifty thousand dollars. Written solicitation of written quotes, bids, or proposals must be made for a small purchase over ten thousand dollars but not in excess of fifty thousand dollars. The procurement must be advertised at least once in the South Carolina Business Opportunities publication or through a means of central electronic advertising as approved by the designated board office. A copy of the written solicitation and written quotes must be attached to the purchase requisition. The award must be made to the lowest responsive and responsible source or, when a request for proposal process is used, the highest ranking offeror.”

Small Purchase Bid Types

- Small Purchase RFQ (Request for Quotation)
- Small Purchase IFB (Information For Bid)
- Small Purchase BVB (Best Value Bid)
- Small Purchase RFP (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.

Redistribute Workload cont.

Redistribution of Workload

Find Documents

Requirements
 Purchase Orders
 Bid Invitations
 Contracts

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

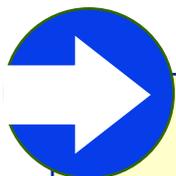
[Start](#)
 [Extended Search](#)
 [Reporting Workload](#)

Results List

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

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



- ◆ Redistribute Workload



Process Bid Invitation

Objectives

- Upon completion of this lesson, you should be able to:
 - Take a requirement from Carry Out Sourcing and create a small 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
SRM Carry Out Sourcing (Bidding)	Materials Management>Procurement > Bidding	This procedure is used when it is determined by the buyer that a bid invitation should be created.
SRM Process Bid Invitation Creating and Publishing a Small Purchase Bid Invitation_th_final.udc	Materials Management>Procurement > Bidding	Perform this procedure when the buyer needs to issue a bid invitation for a Small Purchase.
ZMM BUYER Buyer Main Menu (Bidding) Solicitation Email Notification	Materials Management>Procurement >Bidding	Use this procedure to send out solicitation e-mail notifications.



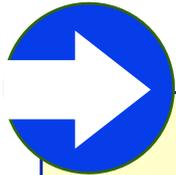
Create Surrogate Bids

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

Demonstration and Exercise



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

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



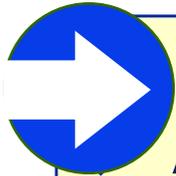
Accept and Create Purchase Order and Contract

Objectives

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

Create Purchase Order or Contract or Both?

- Create Purchase Order if:
 - You are ready to encumber funds
- Create Contract if:
 - You are issuing a multi-year contract
 - You are creating a agency wide contract or division specific contract
 - You want the flexibility to create multiple purchase orders against the contract



Accept and Create Purchase Order and Contract

- ◆ Evaluate and Accept a Small Purchase Bid – Exercise 4

Title	uPerform Location	Purpose/Trigger
SRM Process Bid Invitation (Evaluate and Accept a Small Purchase Bid)	Materials Management>Procurement >Bidding	Perform this procedure when a Small Purchase bid invitation has closed and you are ready to evaluate and create the purchase order and/or contract.

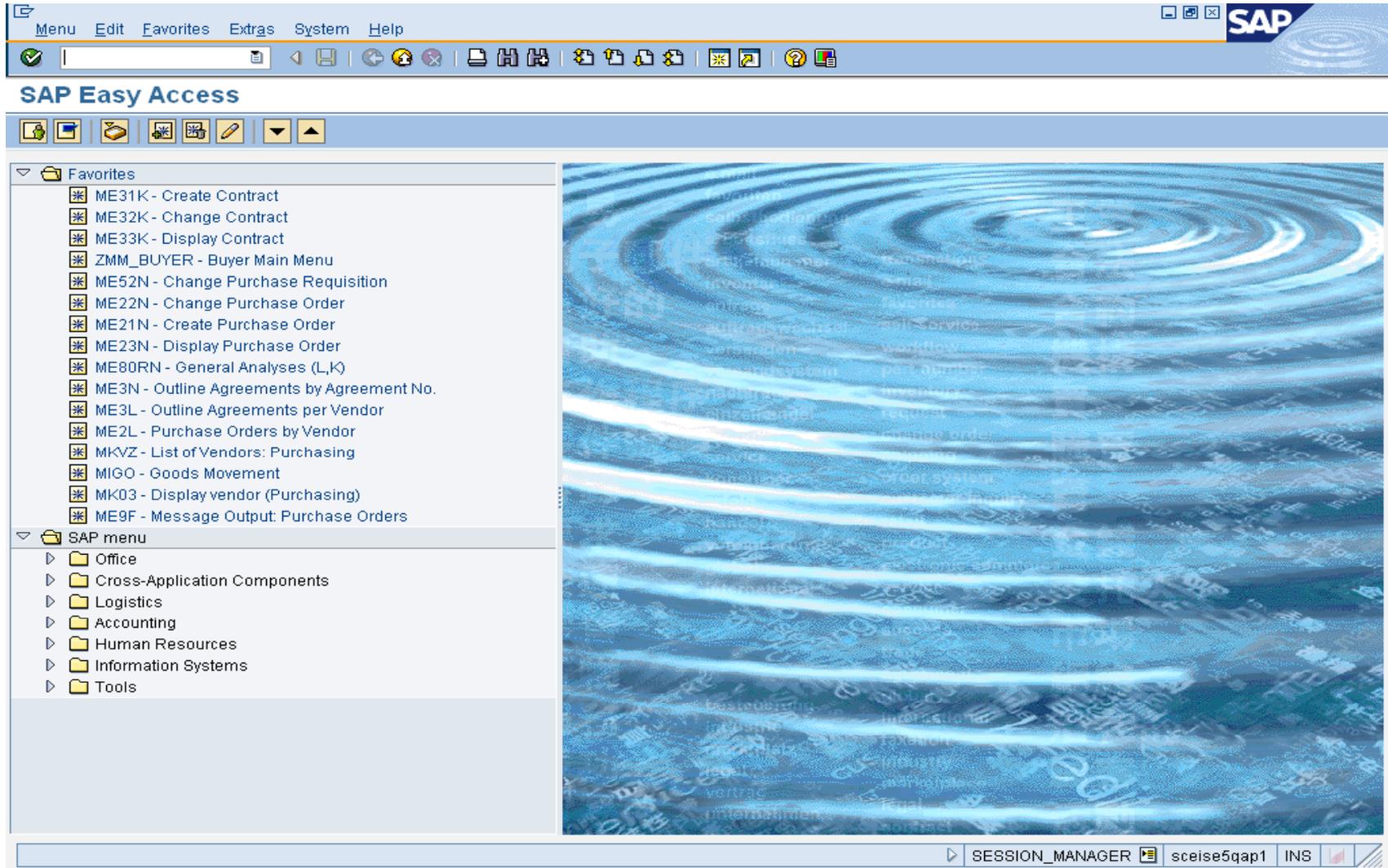


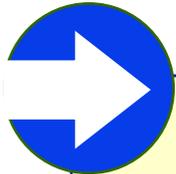
Modify Contract

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





Change Contract

- ◆ Transaction ME32K – Exercise 5

Title	uPerform Location	Purpose/Trigger
ME32K Change Contract (Small Purchase)	Materials Management>Procurement >Bidding	Perform this procedure to modify your contract in ECC.

Next Steps: MM Breakout Sessions



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

🌀 Managing and Submitting Bids, Complex Purchases

- June 17 2009 at 9:00 a.m. – 4:30 p.m.
- June 18, 2009 at 9:00 a.m. – 4:30 p.m. (repeat)

🌀 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?

