AdvantageME 303
Procurement—Service Contracts

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Procurement—Service Contracts

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1—Orientation

The General Procurement process involves the following user activities:

- Placing orders for goods or services
- Recording the receipt of those goods or services
- Ultimately remitting payment for the goods and services acquired

In AdvantageME every effort has been made to retain and enhance the functionality currently found in SICOMMnet while tightly integrating the Accounts Payable and General Accounting modules. The SICOMMnet desktop has been replaced with a Procurement Workspace where Procurement functions and business processes may be initiated and status may be tracked through on-line inquiries.

AdvantageME contains several features that provide additional support to users in their general procurement activities. The AdvantageME Procurement Workspace consolidates to one place the links for documents and inquiries needed to complete general Procurement functions. AdvantageME also provides a Procurement Type field for identifying the Business Process being followed to procure Goods or Services for a given requirement. Procurement Type controls through which documents are processed guided by milestones, Vendors evaluations in the Post Award state, and Authorities may be cited on an Award Document.

This General Procurement class is designed to provide you with a basic understanding of the State of Maine's procurement process and the AdvantageME procurement functionality as they relate to the typical department procurement user who shops for items on Catalogs and/or creates Requisitions to send to the Division of Purchases.

Pre-requisites

You should have completed the following courses before continuing:

- AdvantageME 101 Intro to AdvantageME
- AdvantageME 201 Chart of Accounts and General Accounting

Learning Objectives

At the conclusion of this lesson, we will be able to:

- Create Procurement documents:
  - Request for Proposal (RFP)
  - Evaluation (EV)
  - Contracts for Services (BP18R and BP54)
  - Performance Evaluator (PE)
  - Termination (TM)

Document Code Crosswalk

The following table displays the Procurement document codes currently used by end-users in MFASIS and the corresponding new Procurement document codes in AdvantageME.

Business Process	**Pre-AdvantageME**		**AdvantageME**	
Current	**Document Code/Prefix**	**Description**	**Document Code**	**Description**
Build an order from existing Master Agreements	CRO	Contract Release Order	DO	Delivery Order
Request goods or services	PR	Purchase Request	RQS/RQN	Standard Requisition
		Solicitation	RFP	Request for Proposal
		Solicitation	RFP	Request for Quote
		Tab Sheet or Evaluation Criteria –RFP only	EV	Evaluation
		Response	SR	Solicitation Response
Order items without a requisition or Procurement Card	APO	Agency Purchase Order	PO	Purchase Order (Procurement Type APO)
Request delivery against agreement	CRO	Contract Release Order	UR/DO	Delivery Order
	Commodity Contracts	Master Agreement	MA	Master Agreement
Contract for Services	Service Awards	Contract for Services	CT	Contract
Receive goods and services		Receiving Report	RC	Receiver
Record a vendor's invoice	INV	Paper Invoice	IN + PR, PRC, PRM, PRMI	Vendor Invoice + Payment Request
Setup a new vendor	VR	New Vendor Request Form/Registration Sicommnet	VCC	Vendor/Customer Creation
Modify an existing Vendor	VRM / VR	Vendor Request Modification/Login to Sicommnet to update	VCM	Vendor/Customer Modification
Termination	Amendment/Change Order	Amended Document	TM	Termination
Renewal	Amendment/Change Order	Amended Document	RN	Renewal

Business Process	Pre-AdvantageME		AdvantageME	
Current	**Document Code/Prefix**	**Description**	**Document Code**	**Description**
Performance Evaluation	Informal note to file		PE	Performance Evaluation of Vendor

Workflow Unit

AdvantageME Procurement uses the Unit field to route documents through the workflow.

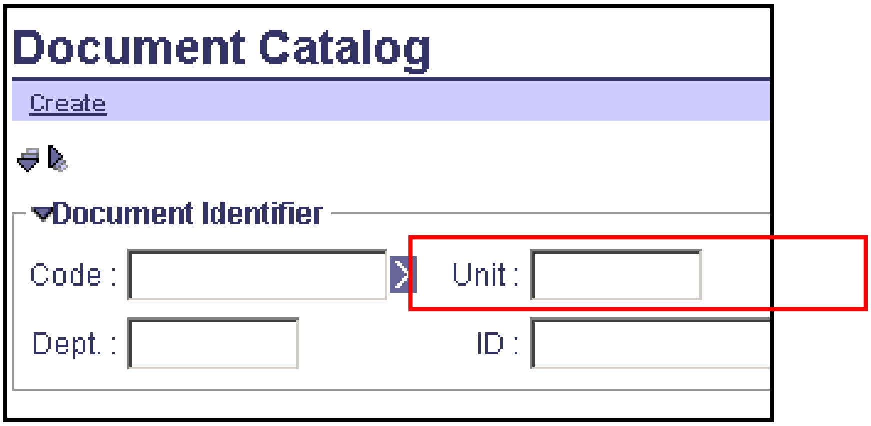
Do not confuse this Unit with the Unit field associated with chart of accounts elements used to organize appropriation of expenditures and revenues in order for department heads to effectively plan and control those activities assigned to them.

All Unit codes have a prefix of WF, except those used for the service center which have a prefix of SC, and two digits suffix (01, 02, etc.). View Appendix A to see all Unit codes.

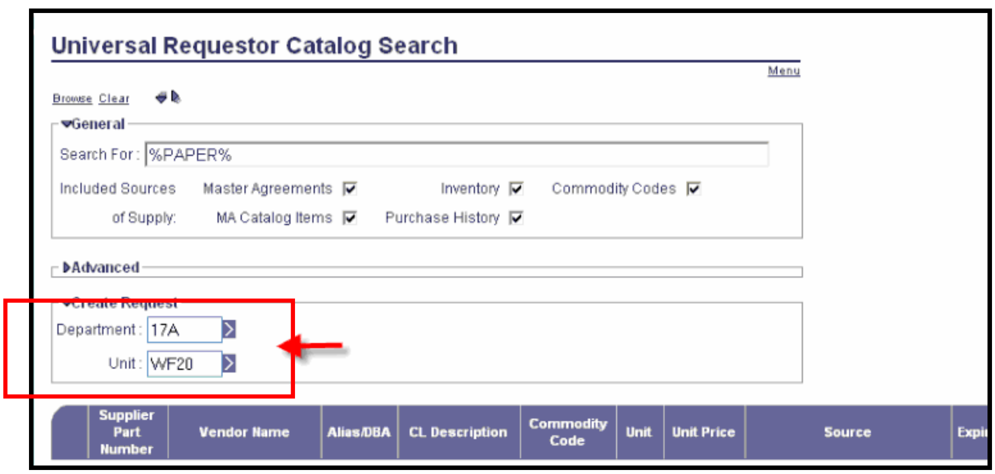
17A	WF01	AP	17AWF01AP	Dept. of Transportation
17A	WF02	AP	17AWF02AP	Admin Services
17A	WF03	AP	17AWF03AP	Stockroom
17A	WF04	AP	17AWF04AP	Contract Procurement Office
17A	WF05	AP	17AWF05AP	Financial Processing
17A	WF06	AP	17AWF06AP	Executive
17A	WF07	AP	17AWF07AP	Communications Office
17A	WF08	AP	17AWF08AP	Human Resources (not S.C.)
17A	WF09	AP	17AWF09AP	Legal
17A	WF10	AP	17AWF10AP	Planning
17A	WF11	AP	17AWF11AP	OPT
17A	WF12	AP	17AWF12AP	OFT
17A	WF13	AP	17AWF13AP	Dept. of Transportation - OIT
17A	WF14	AP	17AWF14AP	M & O Main Office - Augusta
17A	WF15	AP	17AWF15AP	M & O Region 1
17A	WF16	AP	17AWF16AP	M & O Region 2
17A	WF17	AP	17AWF17AP	M & O Region 3
17A	WF18	AP	17AWF18AP	M & O Region 4
17A	WF19	AP	17AWF19AP	M & O Region 5
17A	WF20	AP	17AWF20AP	Environmental Office
17A	WF21	AP	17AWF21AP	Project Development Multimodal
17A	WF22	AP	17AWF22AP	Project Development Bridge
17A	WF23	AP	17AWF23AP	Project Development Highway
17A	WF24	AP	17AWF24AP	Project Dev - Property Office
17A	WF25	AP	17AWF25AP	MDOT STAR

The RFP, CT and TM documents all require a unit code. Populate the **Unit** field with the correct unit code. There are three locations where you enter the Unit code:

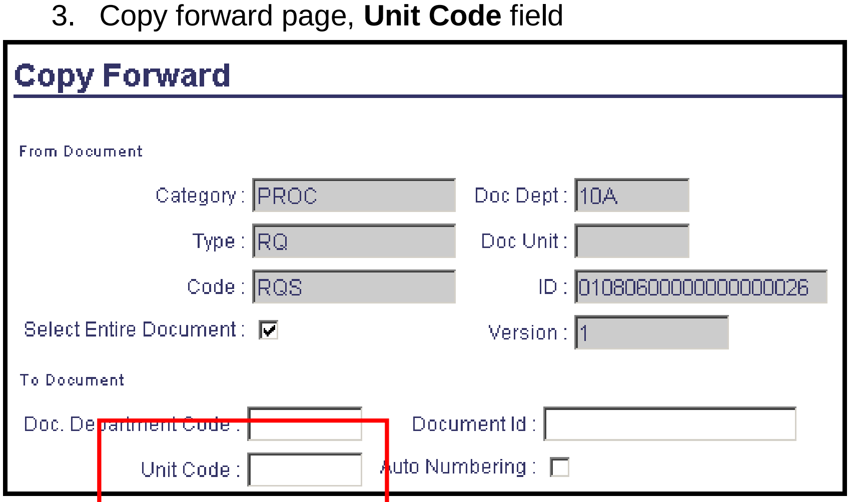
1. Document Catalog, **Unit** field



2. URCATS, **Create Request** section, **Department** and **Unit** field



3. Copy forward page, **Unit Code** field



If you enter an unauthorized or incorrect unit code, the process to correct it is as follows:

- The document is workflowed to the approval role, who rejects the document
- The document is returned to the submitter
- The submitter should repopulate the field with the correct unit code

In order to correct the code, search for the rejected document in the Document Catalog. Copy the document by clicking Copy.

The Copy Document page opens. In the **Unit** field, enter the correct unit code. Click **OK**. **Submit** the document.

Make sure to return to the Document Catalog and discard the original document. To do this, select the document and click **Action Menu**>>**Discard**.

Accounting Templates

Accounting templates provide the ability to save frequently used chart of accounts data for use in subsequent document creation. These templates are used to populate fund and detail accounting elements on documents. Populating the accounting template field is optional within Procurement documents. Note that chart of accounts elements (e.g. Fund, Dept, Unit, SubUnit and Object) must be completed if an accounting template is not selected.

In order to reduce data entry and minimize errors, you can create standard accounting templates with information for processing documents. These templates reduce the amount of time it requires to enter new documents. Templates also make it easier for the non-accountant to process documents.

Basics of the Accounting Templates:

- Accounting templates are invoked after the document is created
- Any accounting elements that have already been entered on the document are not overlaid with values from the selected accounting template. Therefore, accounting templates only default values to blank fields
- After the template is applied, the values entered by the user are maintained

For example, a department creates an accounting template called “Less than $2500” for use with procurement documents. The template includes fund, department, unit, subunit, function and expenditure object. When applying this template on an accounting line with a fund already specified, the accounting template only brings in the department, unit, subunit, function and expenditure object. The Fund Code on the document is not replaced with the Fund Code from the template.

For further questions about creating, modifying, and searching for Accounting Templates, please refer to the AdvantageME 101 Intro to AdvantageME or 201 Chart of Accounts courses.

Event Types

Event Types on the **Accounting** line specify what posting codes are used while bringing in specific rules concerning referenced transactions, customer codes, vendor codes, and all defined chart of account elements in the system for data entry.

Procurement documents will automatically default the Event Type. However, there are instances when the user may need to select an alternate Event Type for a specific business case. The user can select an event type and name combination from the pick list for a particular document's event code. The system never defaults an event type over one entered by a user. If the data entered is not correct for the event type, error messages are issued.

The Event Types used in Procurement documents are listed below.

Procurement Function	Document Code	Event Type
Encumbrance	CT	PR05 (default)
Non-Encumbrance	CT	PR07
Encumbrance (Future Year)	CT	PR08
No accounting Lines	RFP	None
	TM	None
	RN	None
	PE	None

NOTE: PR08 multi year encumbrances are only available on over $2,500 CT documents (BP54).

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2—State of Maine Procurement Process

Procurement Lifecycle

The State of Maine's procurement lifecycle consists of the following six major states, though not all states are required in all procurements:

- **Requisition** – a request for goods or services is created
- **Solicitation** – requirements for goods or services are advertised and vendors are requested to submit information, quotes, bids or proposals
- **Solicitation Response** – vendor responses to solicitations are received and recorded
- **Evaluation** – vendor responses to a solicitation are evaluated for award
- **Award** – formal agreements are established with a vendor to either purchase goods or services or set prices for future purchases
- **Post Award** – the activities that take place during the remainder of a vendor contract after award

Common scenarios used by the State of Maine:

Phases Involved	Initiated by	Scenario	Comments
Requisition to Award	Agency	--Commodity Orders over $2500 --Printing, all dollar amounts	In order to skip the Solicitation Phase a Sole Source justification is required for commodity orders over $2500
Solicitation to SR to EV to Award	Agency or DOP	--RFP—for any service	For an item/commodity, a requisition must always be created. A solicitation (RFQ) is then created.
Solicitation to Award	DOP	--Item greater than $2500 (BPO) --Master Agreement (MA) for any amount	The DOP is not required to create requisitions and may chose to skip the formal Solicitation Response and Evaluation phases and go straight to an Award.
Award	Agency	--Item is less than or equal to $2500 (APO) --Sole Source CT's under $10,000 with justification --Solicitations received and evaluated outside the system	

Note: Post Award documents are not required but can be created at the end of any of these scenarios.

Procurement Folder

The procurement folder is the central repository for documents and documentation related to a single procurement. AdvantageME compiles all activities, documents and related correspondence for procurement into a virtual Procurement Folder. This folder ties multiple procurement documents and documentation items together. The Procurement Folder provides a single point for tracking, assigning, and reporting during the procurement life cycle. Each procurement document belongs to a specific Procurement Folder.

Each folder has a unique identification number generated by AdvantageME which allows users to identify the procurement documents and documentation items that apply to a particular purchase. Each folder also has a **Procurement Title** to easily identify the Procurement Folder. The Procurement Title is displayed on various procurement related pages to aid in identifying the proper folder for a specific procurement.

Try This:

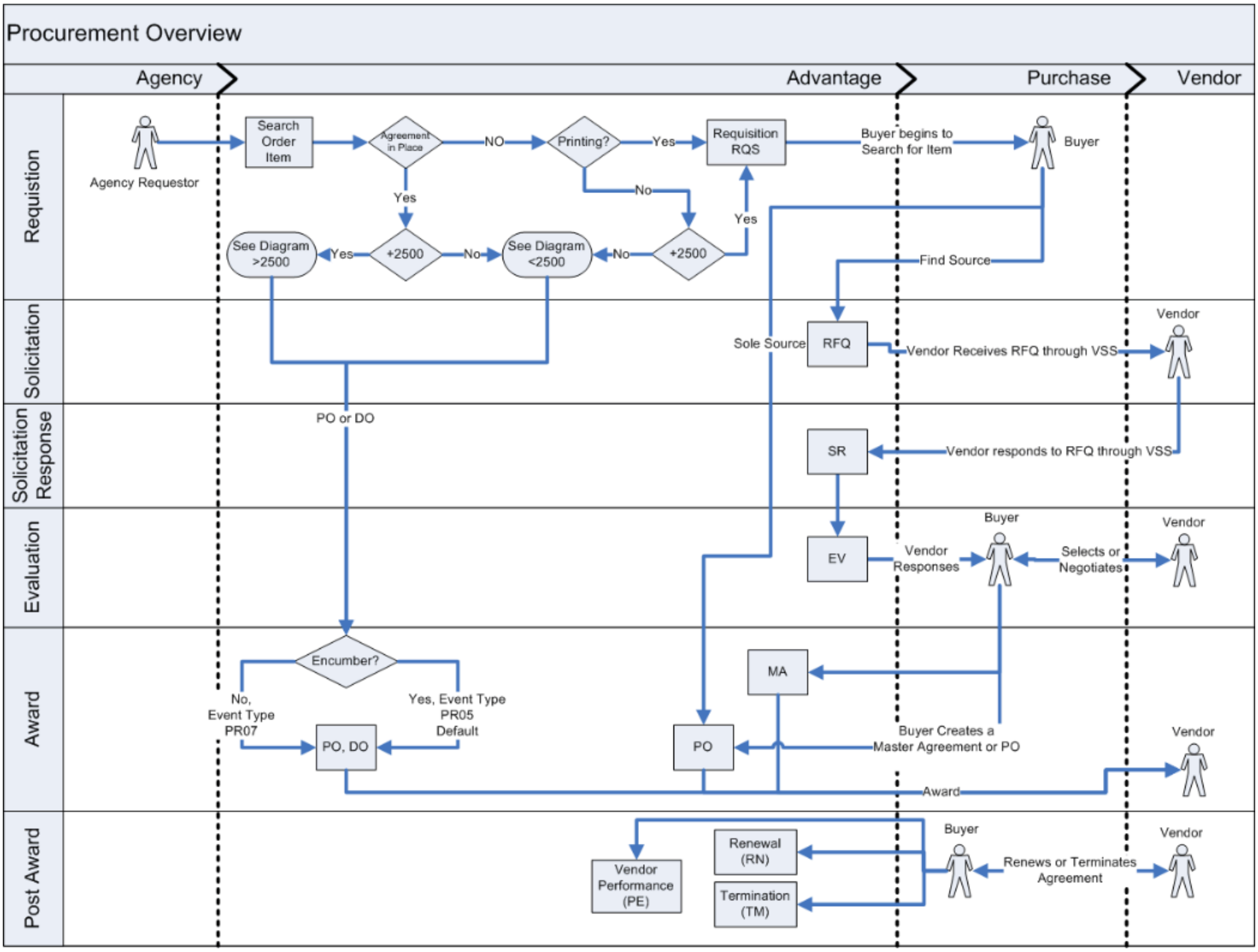
Click Search

Click Page Search

In Page Code, enter PRCUID*, click Browse

Click on link

Maine's Departments generally follow the processes detailed in the following diagram:



Solicitation

The AdvantageME Solicitation state encompasses the documents and events used to advertise a requirement and request vendors to submit information, quotes, or proposals. The Solicitation state has only one document type, Solicitation (SO). AdvantageME uses the following three distinct document codes:

- Request for Proposal (RFP)
- Request for Quote (RFQ) (Buyers only)
- Sealed Surplus Bid (SSB) (Buyers only)

Solicitation Response

Vendors respond to Solicitations issued by the State of Maine using VSS, and their responses are recorded in AdvantageME. The Solicitation Response state encompasses the documents and events used to record a Vendor's response to a solicitation.

Solicitation Response is divided into two main areas:

- Vendor Functionality – operates as a separate application, Vendor Self Service (VSS) integrated with AdvantageME. Please refer to the VSS and VCUST training materials
- Buyer Functionality – the buyer enters responses for vendors who submit hardcopy bids

There is only one Solicitation Response document type, Solicitation Response (SR), and only one Solicitation Response document code, Solicitation Response (SR).

Depending on the Procurement Type, the Solicitation Response state may be optional. For example, if the Solicitation State was not used, the Solicitation Response state will not be used.

The Solicitation Response document does not have any event types tied to it since it does not perform any accounting updates upon submission.

Evaluation

Once all responses have been received and the solicitation closing date and time has passed, the procurement moves into the Evaluation state where responses are inspected, analyzed, and scored by designated evaluators. The Evaluation state encompasses the documents and events used to evaluate a Vendor's response to a Solicitation.

There is only one Evaluation document type, Evaluation (EV). The Evaluation document type has two distinct document codes:

- Evaluation (EV) — Buyer evaluation
- Evaluator (EVT) — Team evaluation—State of Maine will not be using at this time

Award

The Award state is a mandatory state in the Procurement Process.

The Award state encompasses the documents and events used to establish a formal agreement with a vendor, either to purchase defined goods or services or to set prices for future purchases.

The following are AdvantageME award documents:

- Purchase Order (PO)
- Contract (CT)
- Master Agreement (MA)

Post Award

The Post Award state begins immediately after an Award has been made to a Vendor, and encompasses the documents and events that take place during the remainder of the life of the contract.

Post Award encompasses three main areas:

- Receiving (Optional)
- Vendor Performance
- Contract Administration

The following AdvantageME documents may be used in the Post Award State:

- Receiver (RC)
- Vendor Performance (PE)
- Renewal (RN)
- Termination (TM)

The Post Award state is also used as the central repository for all documentation associated with Contract Management (e.g. Bid Deposits, Insurance Certificates, Warranties, Bonds, Retainage, Liquidated Damages, etc.).

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3— AdvantageME Procurement Document Sections

AdvantageME Procurement documents have a Header section and up to eight Detail Sections. The following paragraphs provide an overview of what each section is used for and the types of information that are entered.

Header

The Header section lists general information associated with the entire document.

Vendor

The Vendor section provides Vendor information pertaining to:

- Suggested Vendors for providing the goods/services (Requisitions)
- Vendor associated with a Solicitation Response
- Vendor awarded a contract

Vendors are selected from a pick list that is populated by the Vendor/Customer (VCUST) table.

Sub-Vendors – NOT USED

The Sub-Vendors section lists sub-vendors associated with the procurement—information only. Note that commodity lines are not linked to the sub-vendors. This functionality is rarely used.

Accounting Distribution

The Accounting Distribution section lists the fund distribution across multiple line items. This information allows for the distribution of commodity costs across multiple accounting lines based on percentages. Completing this section is optional when creating Procurement documents. Completion of this section allows you to “push” the accounting distribution to all commodity lines on the document. If you prefer, you can enter accounting information line-by-line in the Accounting section, below. If we chose to complete this section, complete the following fields:

- **Accounting Template**—Select from “Pick List”. Accounting elements associated with the template populate the fund accounting and detail accounting sections.
- **Distribution %**-- The percentage should be entered as a number between 0 and 100 with a maximum of four decimal places. The sum of all distribution percentages for all lines in the distribution must equal exactly 100.

Terms and Conditions – NOT USED

The Terms and Conditions section lists the terms and conditions associated with the document. The Terms and Conditions (TRMC) table is used to establish "pre-established" terms and conditions for selection on this detail section.

Commodity

The Commodity section lists all commodities (goods or services) associated with the document. The State of Maine uses the 5 digit NIGP code and buyers provide a more detailed description in the **CL Description** field.

Accounting

The Accounting section lists the accounting codes for each commodity line, if you have decided not to use the Accounting Distribution functionality covered above.

Posting

The Posting Section lists the posting information for each accounting line.

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4—AdvantageME Procurement Functionality

Worklist

Documents in AdvantageME that require approval will workflow to the appropriate approver's Worklist. The approver can review the document, add comments and either approve or reject the document.

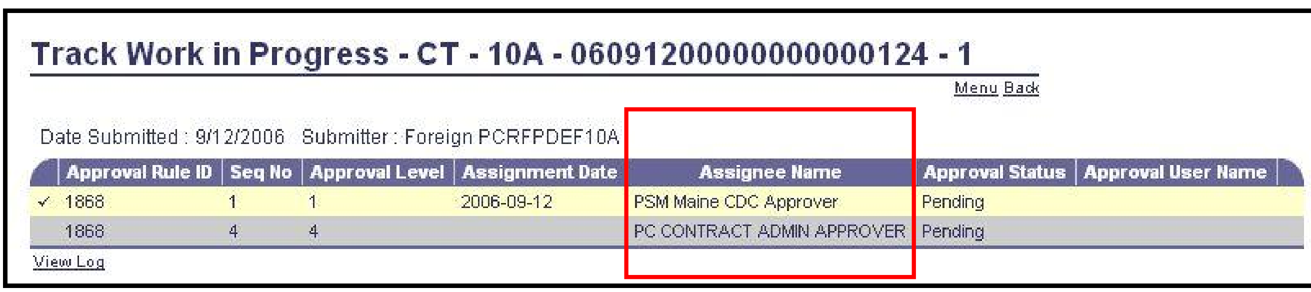
Documents greater than $2500 require three levels of approval before the document is workflowed to the Division of Purchases.

- Department approver
- Department designee (replaces Form DPFY04-1)
- Contract manager

Note: For OIT related items, the document is workflowed to the OIT approver.

If the contract is greater than one million dollars, then it is workflowed to the Contract Review Committee.

In this example, this CT document requires two levels of approval.



The CT document appears in the Approver's worklist. They will Take Task, and then either Approve, Reject or Return the task back to the submitter.

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5—Solicitation

The Solicitation document describes the goods or services that are being requested or offered for sale (Surplus Property). A Solicitation document can reference all Requisition documents by using the Copy Forward functionality, thereby eliminating the need for re-keying, from a FINAL phase RQS, RQN and RQM document.

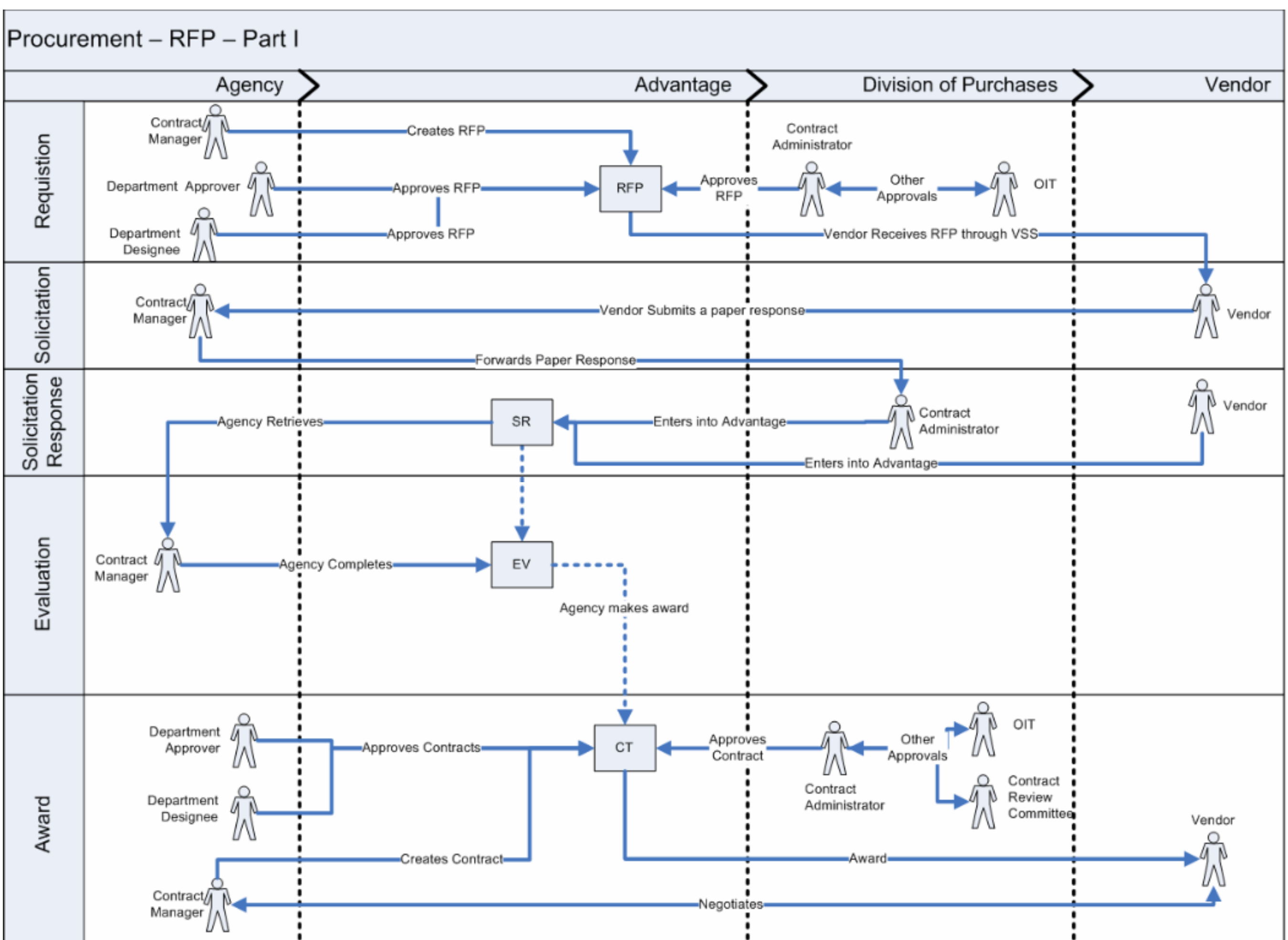
Note: For surplus items, the RQA document is copy forwarded to the SSB document.

The solicitation documents used in AdvantageME are:

- RFQ (Request for Quote) – Used in informal solicitations for goods
- RFP (Request for Proposal) – Used to propagate procurements that may not have exact parameters. Used for services only—i.e. service contracts BP18R and BP54, which will both be detailed later in the course

A Solicitation document can be referenced by the Solicitation Response document, the Evaluation document, all PO document types, and the Master Agreement.

The following diagram details the process:



The Request for Proposal (RFP) is one of three solicitation documents the State of Maine uses. Here is detail concerning the sections of the Request for Proposal (RFP) document:

Schedule of Events (Optional) – Indicate a schedule of events for the Solicitation. This can include the date of a bidder's conference, due date for questions, solicitation closing date, etc.

Terms and Conditions (Optional) – Attach the Terms and Conditions to the document Header or Commodity Line.

Evaluation Criteria (Optional) – Choose individual evaluation criteria from the Evaluation Criteria library, add new ones by free form or choose a template from the Evaluation Criteria library. Optionally, evaluation criteria can be communicated to vendors so they are informed on how their responses will be compared and evaluated. Weights are assigned to criteria as points.

Vendor List (Optional) – This page is only used when sending the solicitation to a targeted list of vendors. Otherwise, leave this page blank and the system selects all vendors registered for the commodities included on the solicitation.

Attachments at header– Documents may be attached at the document header. Attach the Request for Proposal .doc file, which contains the detailed RFP specifications.

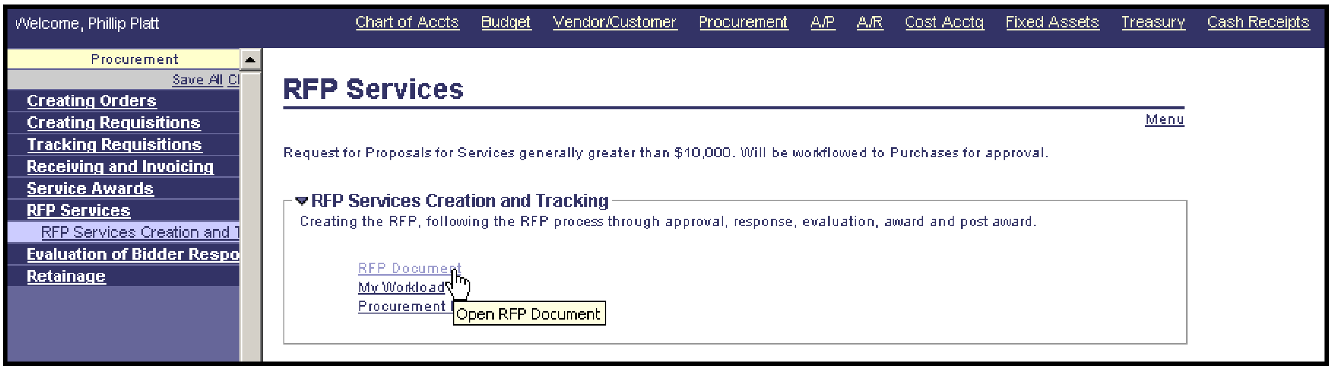
Note: The RFP document within AdvantageME only supports 1500 characters and therefore, the State of Maine requires that you attach the Request for Approval

Publishing criteria – Specify the sections they want to appear in the published solicitation, when they want it published and whether or not they want to publish the vendor list.

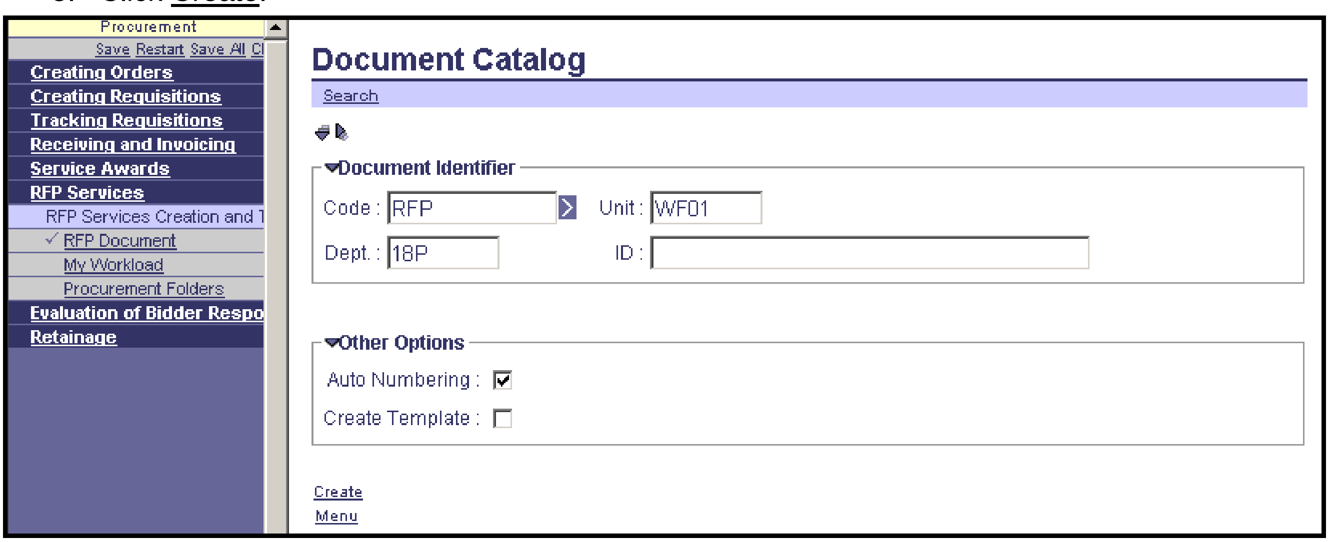
Supporting Documents – This page is not used by the State of Maine.

Creating a Solicitation RFP document:

1. Click Procurement workspace from the Primary Navigation panel.
2. Click RFP Services. Click RFP document.

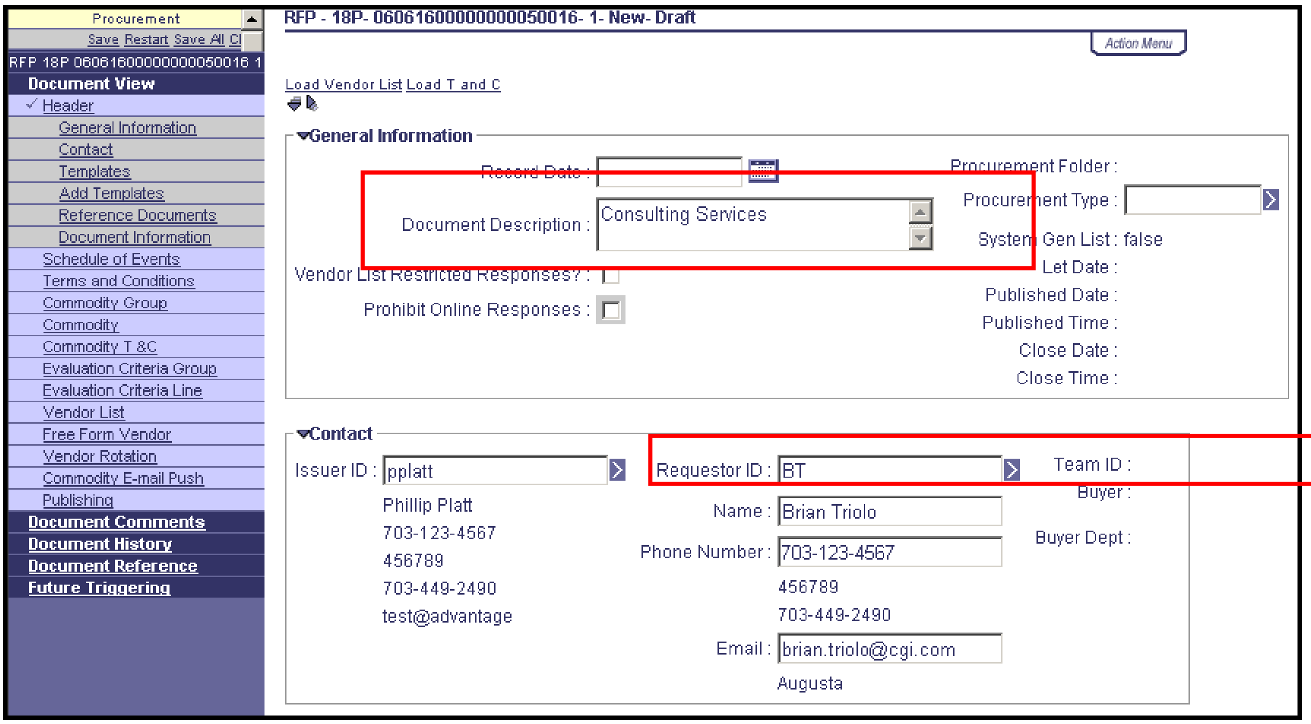


3. The Document Catalog page opens. Click <u>Create</u>.
4. Populate the **Dept** and **Unit field**. Click Auto Numbering.
5. Click <u>Create</u>.



6. The RFP document opens. On the Header line, populate the **Document Description** and **Requestor ID** fields.

7. Select Procurement Type (optional) — select Request for Proposal

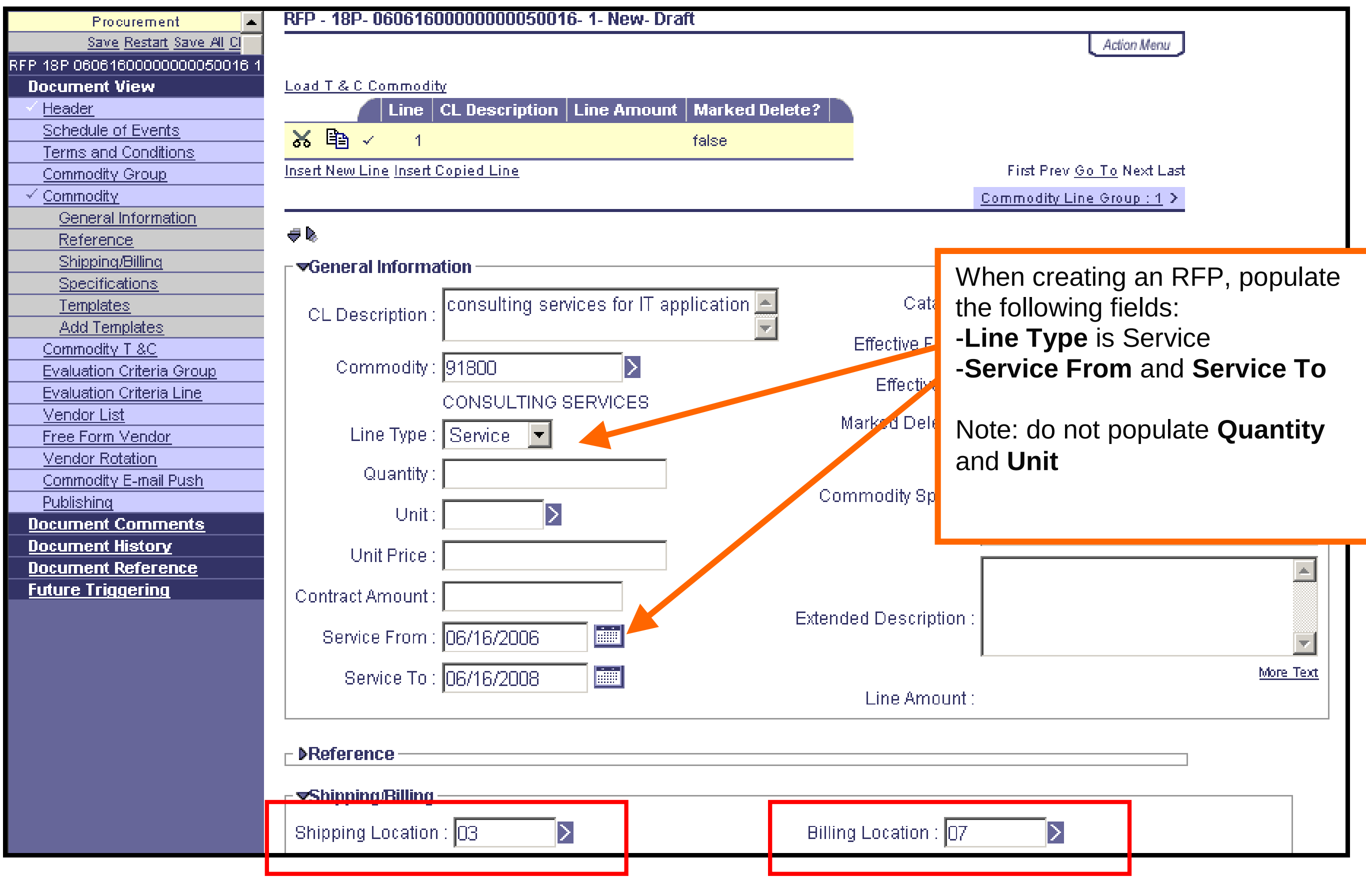


8. Add attachments.

9. Attach Specifications document to Header or commodity line(s).

Click **Commodity** from the Secondary Navigation panel. Click Insert New Line. Populate the following fields:

- CL Description
- Commodity
- Line Type = Service
- Service To
- Service From
- Shipping Location
- Billing Location



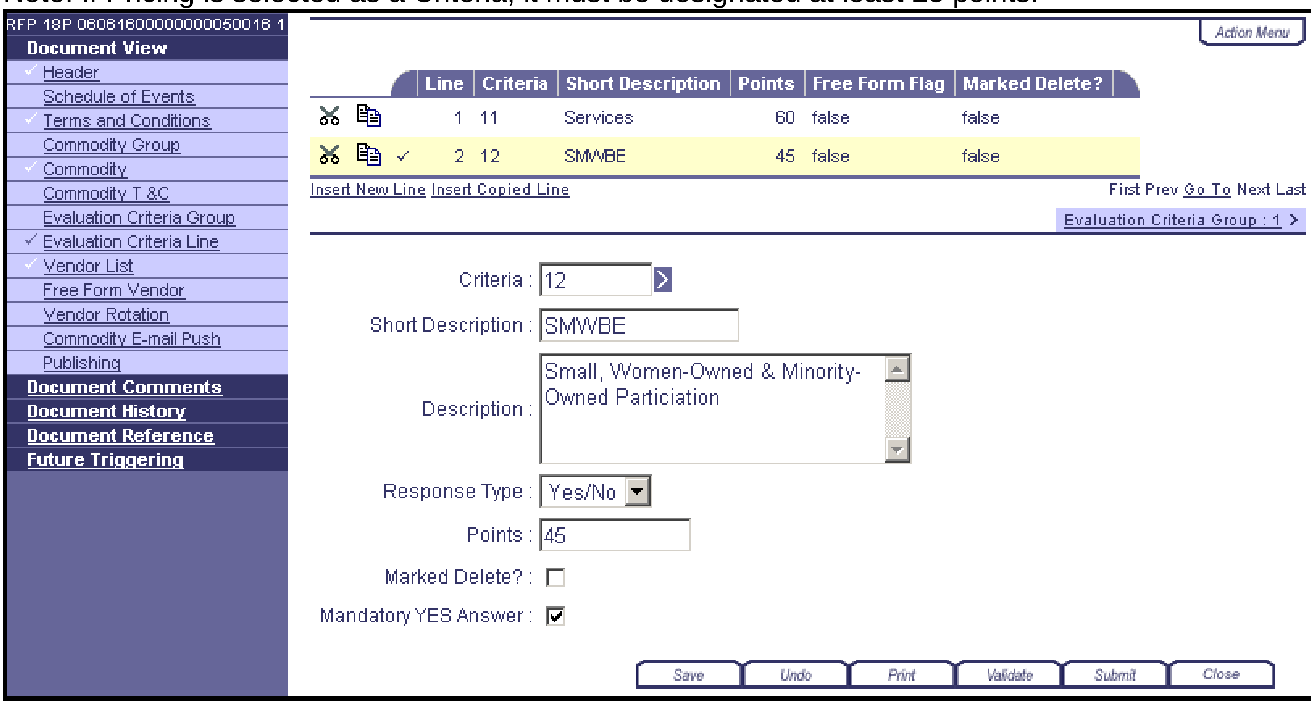
10. Use Commodity Groups to award by Lot.
    Verify NIGP Code, Commodity Description

11. Click **Evaluation Criteria Line** from the Secondary Navigation panel.

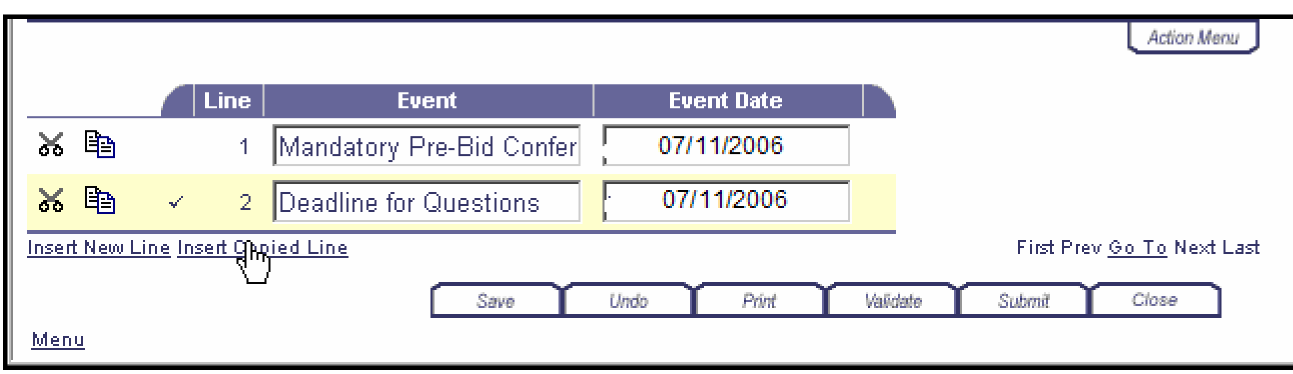
12. Click Insert New Line.

Add different Criteria from pick list. Assign points to each.

Note: If Pricing is selected as a Criteria, it must be designated at least 25 points.



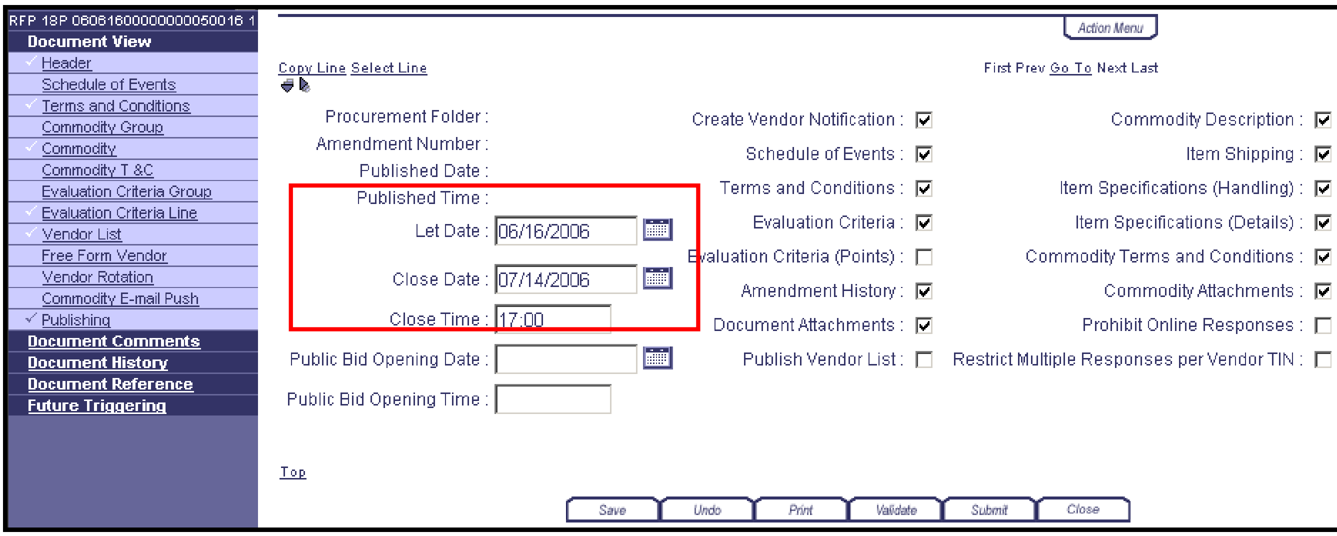
13. Optional—Schedule of Events (Pre-Bid Conference, Deadline for Questions, other)



14. Publishing information (Closing Date, no Public Bid Opening)

Populate the following fields:

- Let Date—The date that the solicitation is published.
- Closing Date—The closing date from the associated solicitation. Must be 14 days beyond Let Date
- Close Time—The closing time from the associated solicitation. Must use Military Time.



15. Submit document

16. An RFP is published out to VSS only when all approvals (from SPRC and OIT, if required) are submitted.

Interaction with Vendors

1. After approval, sync publishes the RFP to VSS with email notification to vendors and buyers. (See VENDNOT for list.)

ADVMAIL: VSSMail: Vendors notified that Solicitation RFP 10A 0000004-1 Amendment #0 has been published.

advantage_vss@ams.com

To: Spencer, Ernest

Dear Ted Spencer
Vendor nofication has been sent for Soliciation RFP 10A 0000004-1 Amendment #0 has been published.

This notification is sent for your information because you are the buyer listed on the above solicitation.

7 emails were sent.
0 faxes were sent.
0 postal notifications were sent.
Please do not reply to this e-mail as it is automatically generated. If you have questions, please contact Customer Support.

ADVMAIL: SOLICITATION < RFP 10A 0000004,0> HAS BEEN PUBLISHED

HOST@MASS.COM

To: Spencer, Ernest

Paul Potomac:

This message is to notify you and your location that the following solicitation has been published.

Solicitation: RFP 10A 0000004,0
Description: Mobile IT classrooms
Click here to view the solicitation: http://10.10.90.232/webapp/VSSPROTO/Advantage?openDoc=openDoc&DocumentCode=RFQ&DepartmentCode=10A&DocumentID=0000004&DocumentVersNo=1&Destination=pSolication

Access the Vendor Notification (VENDNOT) table to view the status of the solicitations.

Vendor Notification

Menu Quick Search

Browse Clear

SO Doc Code : RFP   Vendor Code :

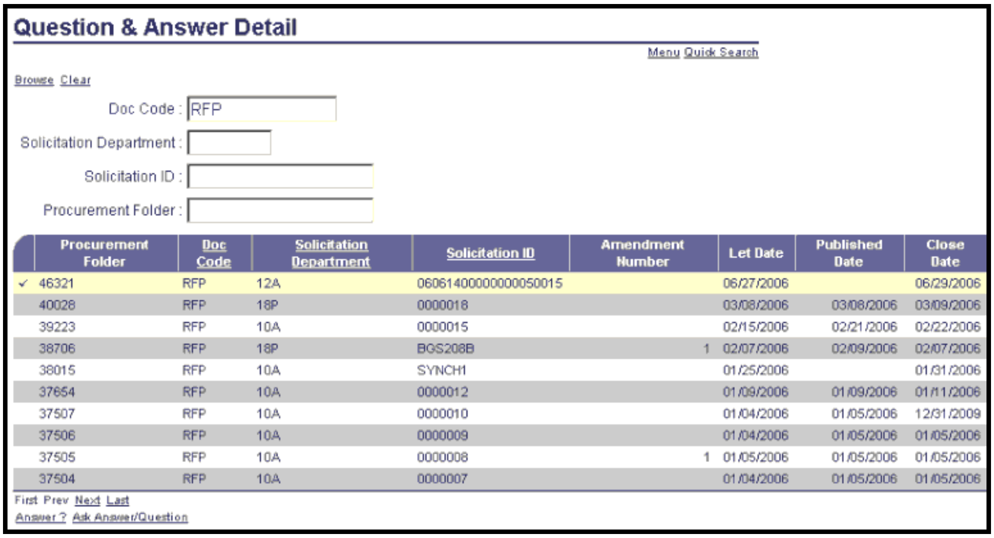
SO Doc Dept :

SO Doc ID :

	SO Doc Code	SO Doc Dept	SO Doc ID	Amendment	Vendor Code	Vendor Name	VSS User ID	Correspondance Type	Email Address
✓	RFP	10A	0000007	0	VS0000000052	Bill Bliss		Email	pat.thomson@cgi-ams.com
	RFP	10A	0000007	0	VS0000000028	Barney Rubble		Email	br@flinstones.com
	RFP	10A	0000007	0	VS0000000052	Pat Kite	kite	Email	pat.thomson@cgi-ams.com
	RFP	10A	0000007	0	VS0000000028	Fred Flintstone	FFlintstone	Email	susan.mack@cgi.com
	RFP	10A	0000007	0	VS0000000052	Pete Kite	kite2	Email	asdd@asdsd.net
	RFP	10A	0000007		VS0000000052	THE KITE SHOP	kite	Email	PAT.THOMSON@CGI-AMS.CO
	RFP	10A	0000007		VS0000000052	THE KITE SHOP	kite2	Email	PAT.THOMSON@CGI-AMS.CO
	RFP	10A	0000007		VS0000000028	FLINTSTONES PAVING COMPANY	FFlintstone	Email	PAT.THOMSON@CGI-AMS.CO
	RFP	10A	0000007		VS0000000052	THE KITE SHOP	kite	Email	BR@FLINSTONES.COM
	RFP	10A	0000007		VS0000000052	THE KITE SHOP	kite2	Email	BR@FLINSTONES.COM

First Prev Next Last

2. Optional—Access the Solicitation Questions & Answers (SOQA) table to respond to or ask questions. Vendors will submit Questions through VSS. DOP will notify Department that questions are pending answers.



Question & Answer Detail

Menu Quick Search

Browse Clear

Doc Code : RFP

Solicitation Department :

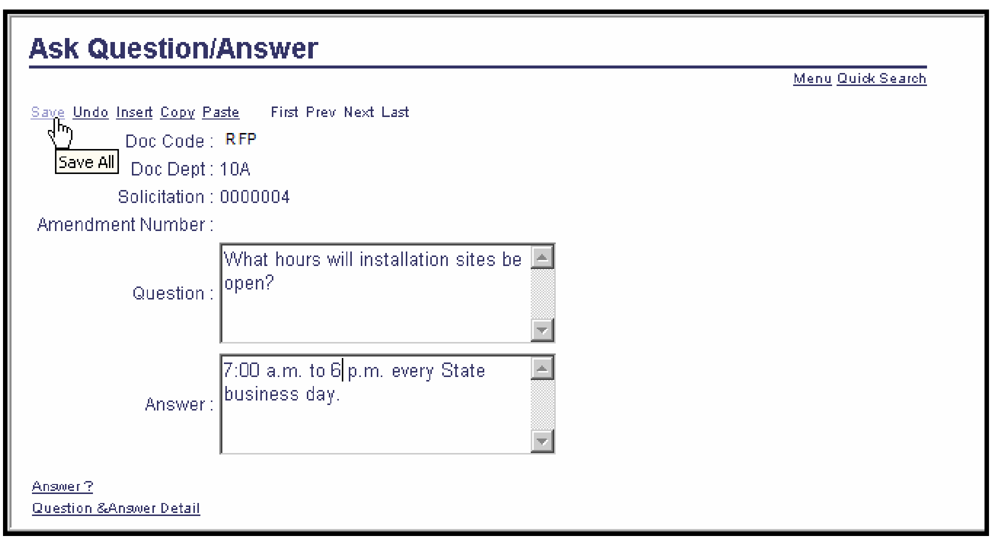
Solicitation ID :

Procurement Folder :

	Procurement Folder	Doc Code	Solicitation Department	Solicitation ID	Amendment Number	Let Date	Published Date	Close Date
✓	46321	RFP	12A	06061400000000050015		06/27/2006		06/29/2006
	40028	RFP	18P	0000018		03/08/2006	03/08/2006	03/09/2006
	39223	RFP	10A	0000015		02/15/2006	02/21/2006	02/22/2006
	38706	RFP	18P	BGS208B	1	02/07/2006	02/09/2006	02/07/2006
	38015	RFP	10A	SYNCH1		01/25/2006		01/31/2006
	37654	RFP	10A	0000012		01/09/2006	01/09/2006	01/11/2006
	37507	RFP	10A	0000010		01/04/2006	01/05/2006	12/31/2009
	37506	RFP	10A	0000009		01/04/2006	01/05/2006	01/05/2006
	37505	RFP	10A	0000008	1	01/05/2006	01/05/2006	01/05/2006
	37504	RFP	10A	0000007		01/04/2006	01/05/2006	01/05/2006

First Prev Next Last

Answer ? Ask Answer/Question



Ask Question/Answer

Menu Quick Search

Save Undo Insert Copy Paste   First Prev Next Last

Save All

Doc Code : RFP

Doc Dept : 10A

Solicitation : 0000004

Amendment Number :

Question : What hours will installation sites be open?

Answer : 7:00 a.m. to 6 p.m. every State business day.

Answer ?

Question &Answer Detail

Note: The Question and Answer fields allow a maximum of 1500 characters. Therefore, you may need to create a .doc file and attach it to the RFP as an amendment. Realize that the amendment must go through the approval process.

Q&A is visible in VSS to all vendors.

[Log In to AdvantageME](#)

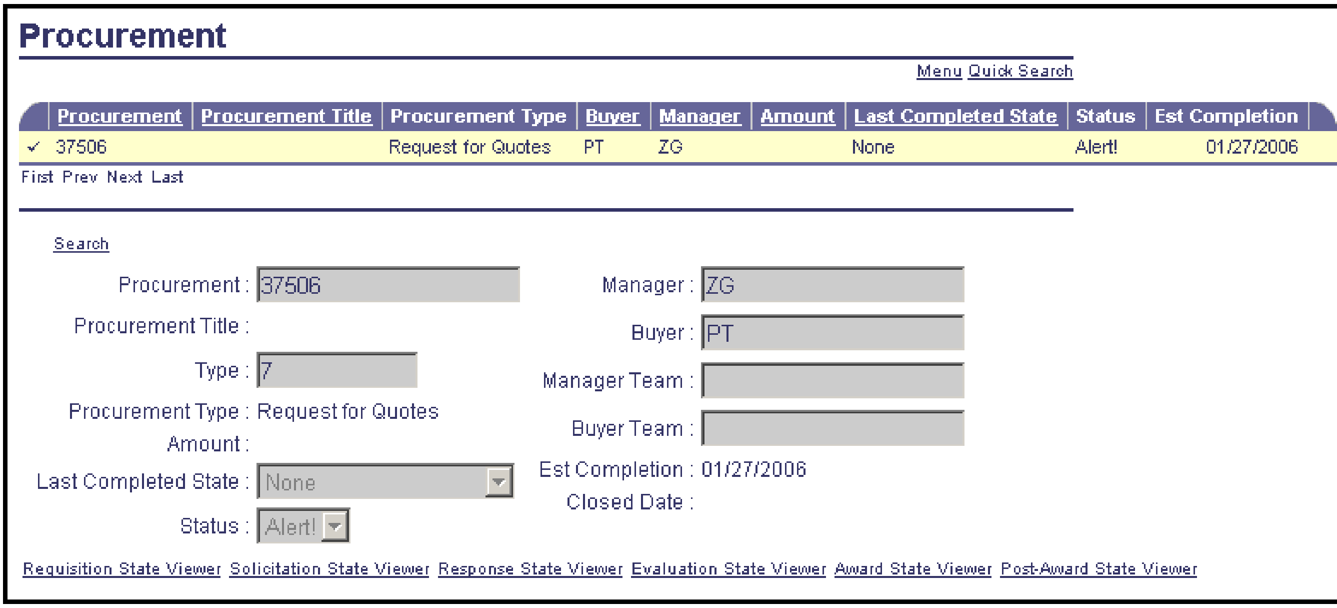
[Go to Exercise 1 to Create an RFP document](#)

Searching for the Solicitation

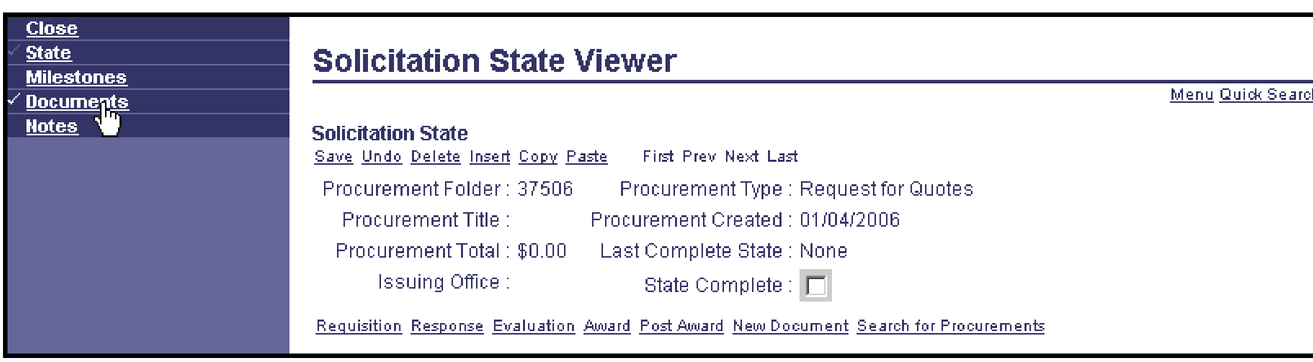
Access the Procurement Folder (PRCUID) table. Search for your Procurement folder number.

Note: The Procurement Folder is detailed later in this course.

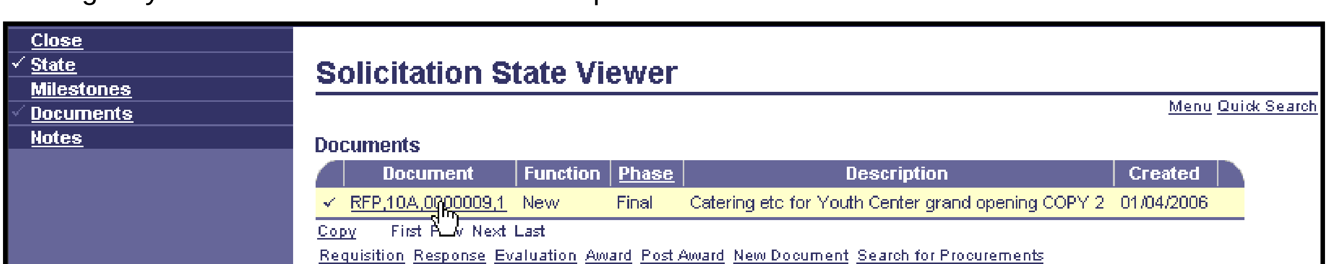
Click Solicitation State Viewer.



The Agency Issuer clicks Documents to access the RFP.



The Agency Issuer clicks on the RFP link to open the document.



6—Evaluation

The Evaluation State has one document type, Evaluation (EV). The Evaluation Type has two distinct document codes:

- EV (Evaluation document) - Created by the buyer or department. It is used to compile all vendor responses, Evaluator scores, Evaluator comments, and award contracts. The EV can also be used to evaluate vendor's responses, instead of or in addition to the EVT document.
- EVT (Evaluator Team document) - Created from the EV document. Evaluators are able to view and compare all of the vendor responses, provide overall comments and score evaluation criteria responses. **Note: the State of Maine is not using this functionality at this time.**

The Evaluation state documents do not have any event types tied to them, as they do not perform any accounting updates upon submission.

The Evaluation (EV) document can reference any of the Solicitation documents in the Procurement Folder. The EV document can be created:

- Via the Document Catalog
- New Document action on the Evaluation State Viewer (which was displayed in the previous section)
- Using the Copy Forward button on Solicitations that have been submitted to Final

The Evaluator (EVT) document is created from the EV document. However, it is not created by using the Copy Forward action or the New Document action within the Evaluation State Viewer. Instead, clicking on a link on the EV document creates it. This will set up all referencing information for the evaluators. **Note: the State of Maine is not using EVT functionality at this time.**

Create an EV document

Copy forward from RFP to create an EV document. Make sure to populate the Unit field on the Copy Forward page.

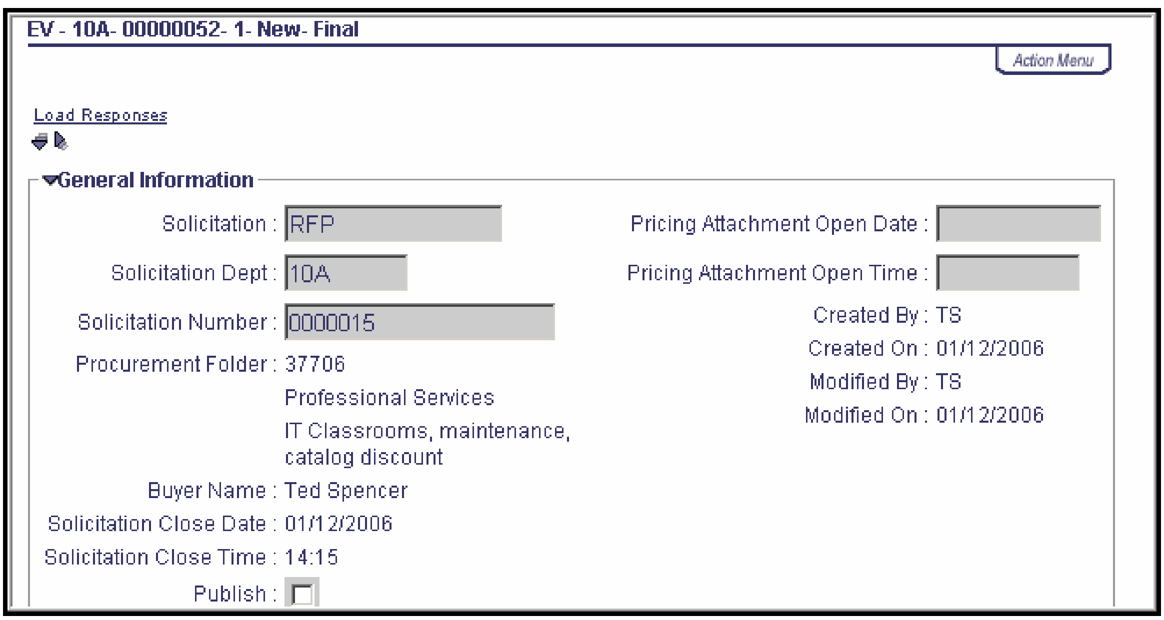
The EV opens to the Header.

The **Header** section on the EV document is used to identify the Solicitation document within the Procurement Folder that you will be evaluating responses for. The Header section is also used to load all vendor responses. This includes the responses that are entered via the web and the ones that have been entered manually.

Load Responses.

Note: Before Closing Date/Time, no responses load.

Load Responses again after Closing Date/Time, after VSS sync and after the Division of Purchases have loaded the paper responses.

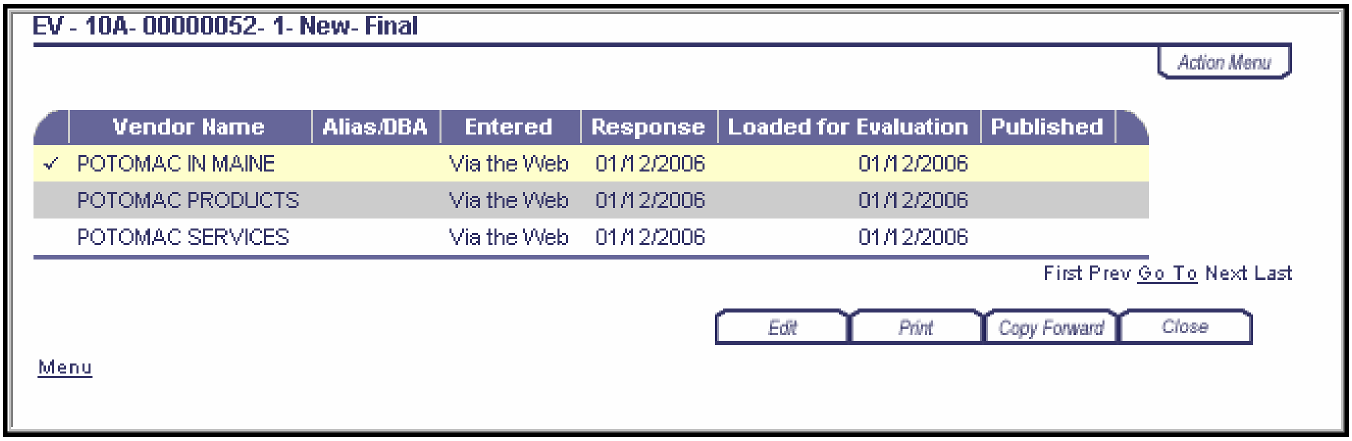


Note: If you have a paper response from a vendor, then you will have to forward the paper response to the Division of Purchases. They will then load it into AdvantageME.

The Header may be used to generate the following documents: Contract (CT), Buyer Purchase Order (BPO) and Receivable for Surplus (RES). The Document Creation subsection allows you to indicate the document that you want to create. The Document Code pick list only allows you to select from valid document codes. You must specify the Document Department Code and Unit. The Create Document link will create the document for you in Draft phase. You can link to the document from the **Awarded Items** line from the Secondary Navigation panel.

The **Load Statistics** section will tell you how many vendors have responded to your Solicitation, how many responses have been loaded and how many responses still need to be loaded to the EV document.

The **Load Statistics Details** section allows you to view the name of vendors that have responded to the Solicitation and how the response was entered into AdvantageME.



The Awarded Items detail section displays a listing of all Award documents that have been created from this Evaluation document. This section tracks all of the award documents at the Vendor Code and Commodity Line level. The records are displayed in a grid and are sorted by SO Commodity Line number. You can click on the **Award Document Number** to view the actual Award document.

THE STATE OF MAINE DOES NOT USE BID TABULATION AT THIS TIME.

The Bid Tabulation detail section shows Vendor Responses by Commodity Group, Commodity Line and Total Bid. The Vendor Names are listed across the top and the Commodity Groups and Lines are listed down the left side. The Lowest Bid by Commodity Group, Commodity Line, and Total Bid (Highest Bid if evaluating a Surplus Solicitation) will be displayed in bold. The words NO BID will be displayed on the Commodity Line if the vendor has opted to not submit a bid for that line. If a commodity line is displayed as NO BID, the corresponding Commodity Group and Total Bid will also display as NO BID, as the vendor did not submit bid information for all commodities in the group or for the entire Solicitation.

View SR (paper & VSS) responses on Bid Tabulations.

EV - 10A- 00000052- 1- New- Final

Action Menu

Bid Tabulation

Copy Line Select Line

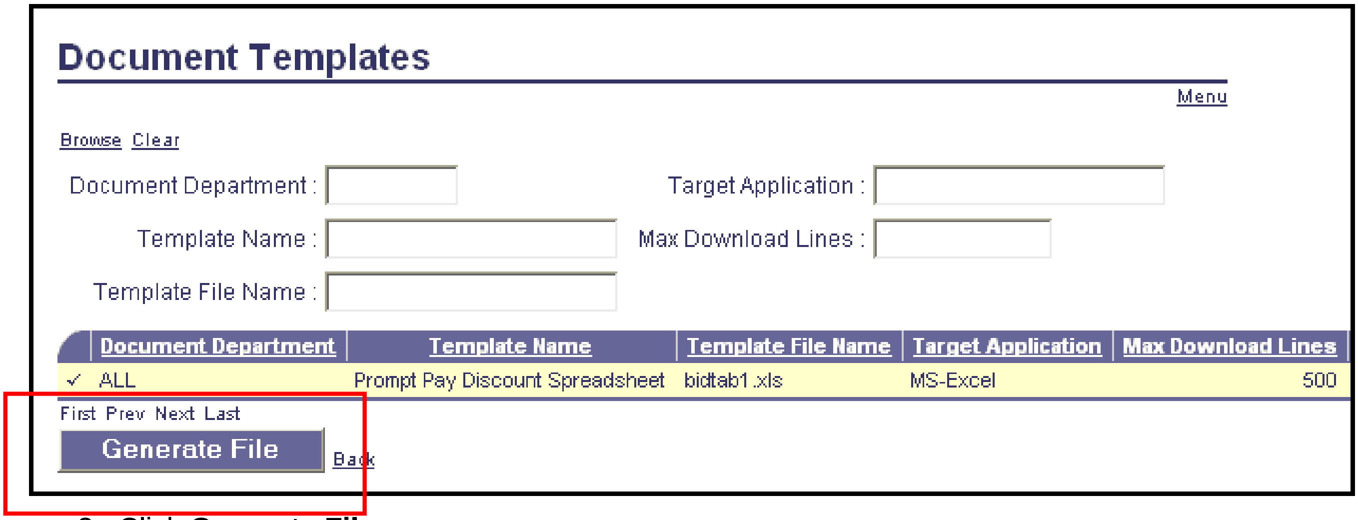
First Prev Go To Next Last

Group		POTOMAC IN MAINE	POTOMAC PRODUCTS	POTOMAC SERVICES
Classroom				
	1	**$175,000.00**	$220,000.00	NO BID
Total For Classroom		**$175,000.00**	$220,000.00	
Maintenance				
	1	$8,000.00	$15,000.00	**$7,500.00**
Total For Maintenance		$8,000.00	$15,000.00	**$7,500.00**
Catalog Discount				
	1	4.00%	**6.00%**	NO BID
Total For Catalog Discount				
Total Bid		**$183,000.00**	$235,000.00	NO BID

In AdvantageME, a more detailed Bid Tabulation has been created to make evaluation and award easier, especially when prompt payment discounts are offered. To access the detailed Excel spreadsheet, follow these steps:

1. Click on Action Menu

2. Choose File>>Download Document



3. Click **Generate File**.
4. A pop-up box will appear. Click Open.
5. The Excel spreadsheet will appear with a pop-up box. You must select Enable Macros.

Note: If an error message appears, that indicates that your macro security needs to be adjusted. Please follow these steps:

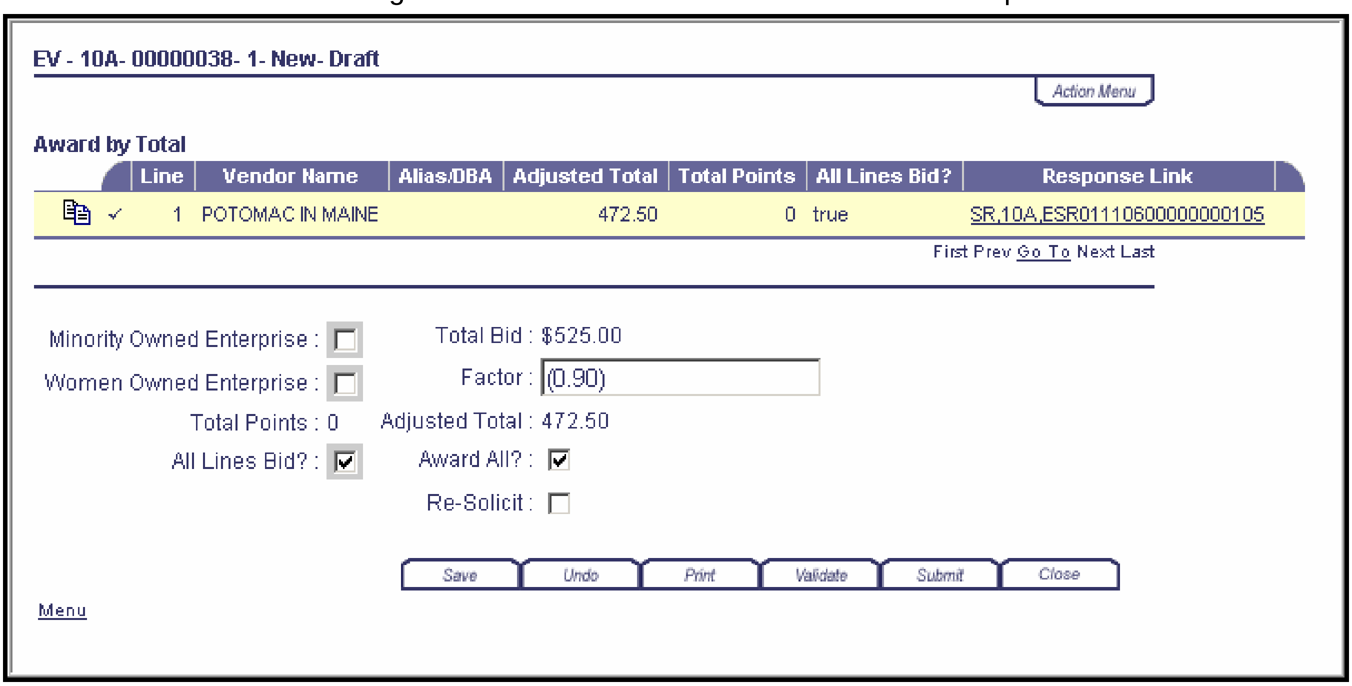
1. Click **Tools**>>**Options**.
2. A pop-up box will appear. Select the **Security** tab.
3. Another pop-up box will appear. Select **Macro Security**.
4. Change setting from High to Medium. Click **OK**.
5. Close the Excel spreadsheet.
6. Click **Generate File**.
7. A pop-up box will appear. Click **Open**.
8. The Excel spreadsheet will appear with a pop-up box. You must select Enable Macros.

The Solicitation Commodity Line detail section displays the original commodity line(s) from the solicitation. A **No Award** checkbox is provided for each commodity line from the Solicitation. You can select the No Award checkbox if you have determined that no award will be made for a specific commodity line. After this checkbox has been selected, no awarded references can exist for that commodity line. If the **Post Award Notification to Web** flag is set to Yes on the Procurement Document Control table for the associated Solicitation document code, all lines marked as No Award will be posted to the Notice of Intent to Award page on the Vendor Self Service website as NOT AWARDING.

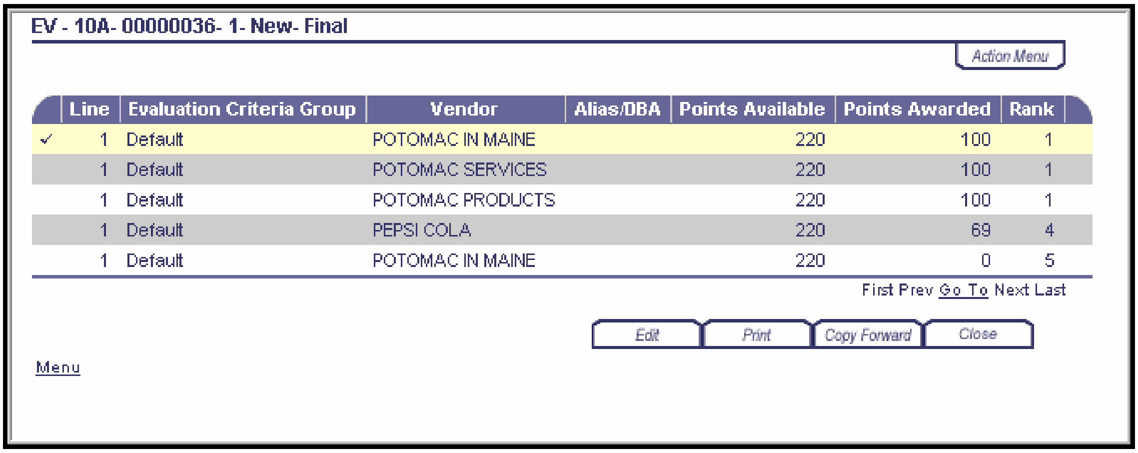
The Award By Line detail section displays the vendor's responses to the commodity lines within a commodity group. The Group Exchange Grid can be used to change the view to a different commodity group. From this view, you can award a specific commodity line to a vendor by selecting the **Award** check box for that vendor's commodity line response.

The Award By Group detail section displays the vendor's response data, sorted by commodity group, allowing the user to compare the commodity group responses for each vendor. From this view, you can award a Commodity Group to a vendor by selecting the **Award** check box for that vendor’s commodity group response.

The Award By Total detail section displays a list of all vendor responses. The vendors **Total Bid Amount**, **Minority Owned** and **Woman Owned** statuses are also displayed in this section. You can apply a **Factor** to a vendor's bid for evaluation purposes as needed. The **Adjusted Total** displayed will then reflect the **Factor** increase or decrease entered by you. From this view, you can award an entire solicitation to one vendor using the **Award All** check box for that vendor’s response.



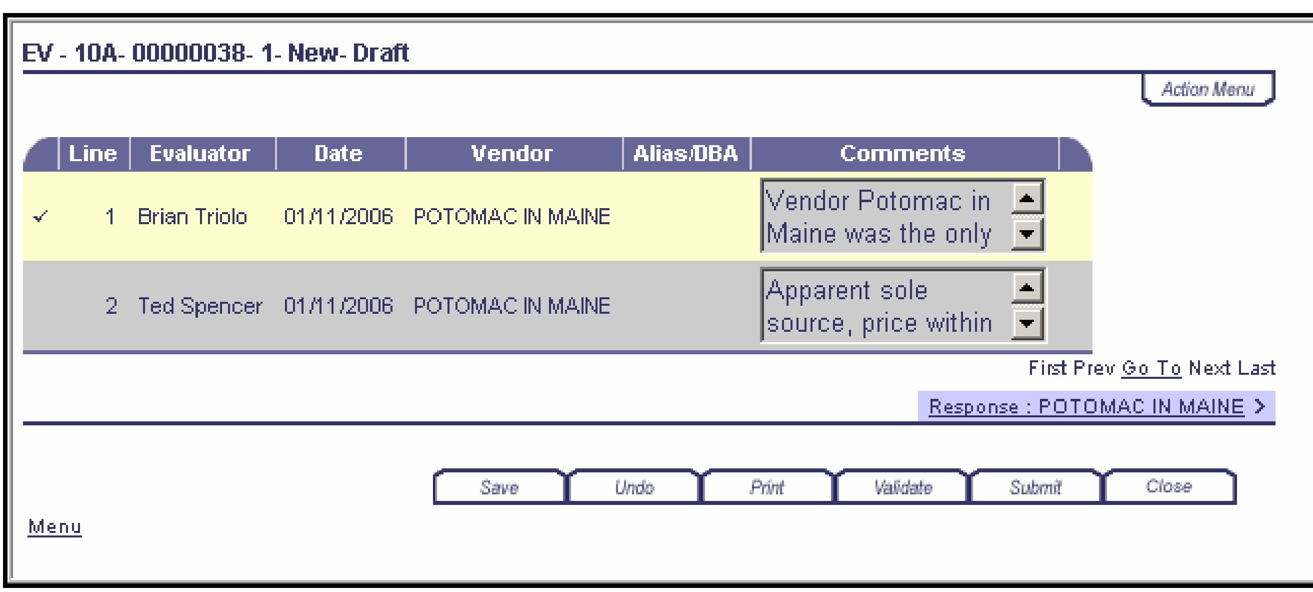
The Rank By Criteria Group detail section displays the vendor's rank by criteria group based on the scores entered by the evaluators for the vendor's evaluation criteria responses.



The Score By Criteria detail section allows you to view and score the vendors' criteria responses directly on the EV document by clicking on the **Load Criteria Line** action. This action can only be selected if no lines exist on this section. You use the **Points Awarded** field to establish a score for each vendor's Evaluation Criteria response. An exchangeable grid is used to switch between vendors. Click Delete All Lines to delete all lines from this section.

The Comments Summary detail section displays, by evaluator, the comments entered by each vendor response to the solicitation.

The Evaluator Comments detail section displays the comments entered by the evaluators. This section also allows you to enter comments directly onto the EV. At least one comment must exist for all vendors selected for award. If a comment does not exist an error will be received upon creation of the award document. The comments are displayed in Evaluator Order.



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7—Award

Award documents can be:

- Created as a standalone document (does not reference another document)
- Generated from another procurement document.

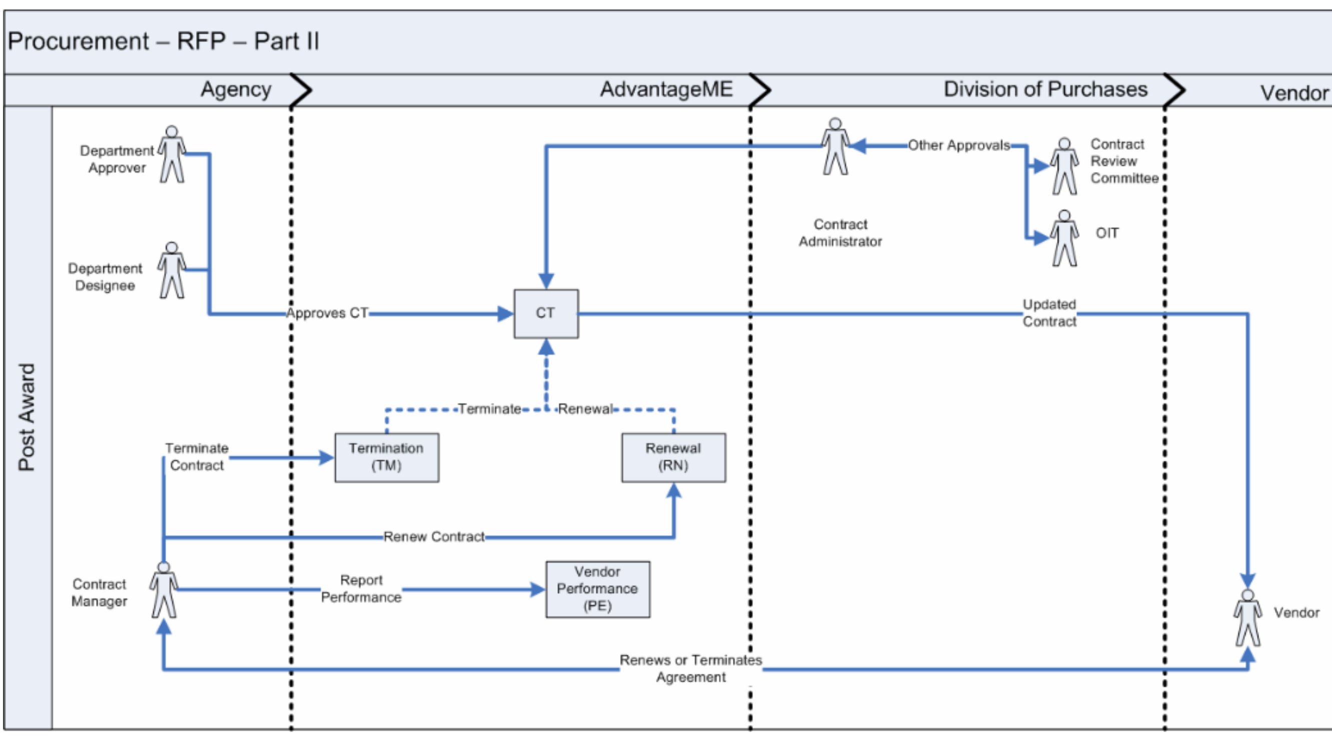
Service Contracts (CT)

Within AdvantageME, we can create the following contracts:

- A contract for a service costing $2500 or less (BP18R)
- A contract for a service of any amount. Contract may be amended. (BP54)

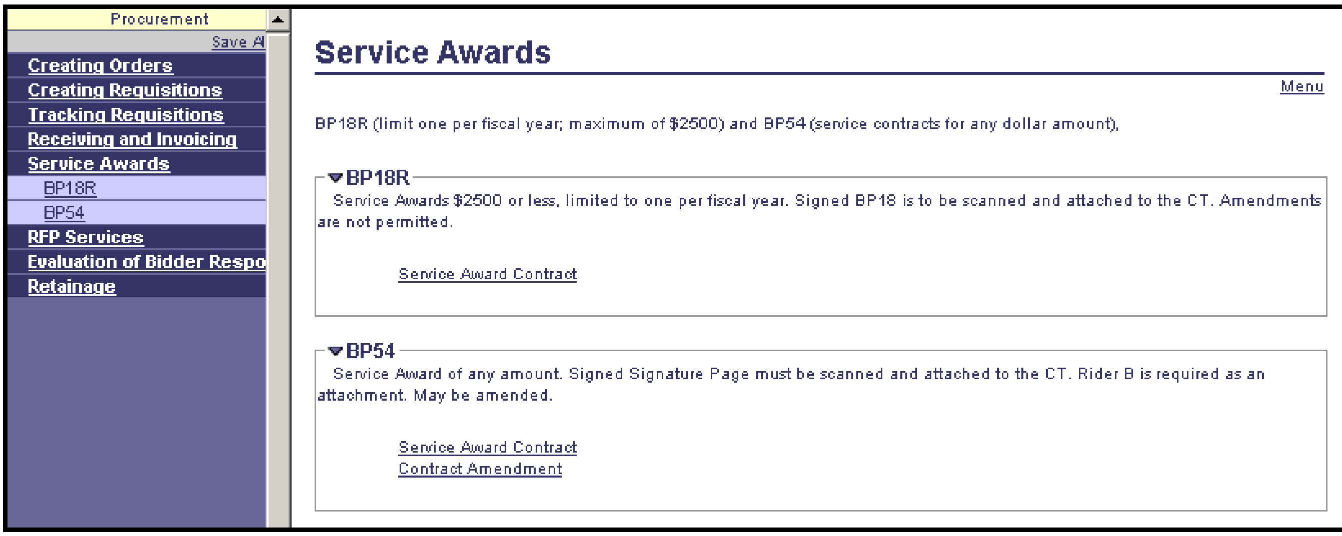
Most CT documents can have a **Line Type** of Service, but in some cases, for example custodial contracts, the **Line Type** field is Item.

The following diagram details the Contract process:



Although it is possible to create an entire contract in AdvantageME, the fields available for use are typically limited to 1500 characters or less, which would be sufficient space for only the simplest contracts. Most users will find it necessary to attach contracts that have been created outside of the system to the CT document created in AdvantageME.

To create a contract document, click the Procurement workspace. Click Service Awards in the Secondary Navigation Panel. Links to both of the service contracts are displayed.



Contracts may be created in three ways: (1) from RFP—via the EV document, (2) manually from the Document Catalog or (3) by copying an existing contract and changing only the fields that are different from the contract you want to create.

Note: BP18R contracts do not reference a solicitation. Only BP54 contracts reference other documents, which can be created from the Header line of the EV document; this will be detailed in Exercise 2.

In AdvantageME, the processes for creating a BP18R and a BP54 are almost identical. The ONLY differences between the two are: (1) the Procurement Type code (required field), and (2) the actual document you attach to the CT document.

What will happen to contracts that begin before AdvantageME goes live, but which expire after AdvantageME goes live?

Encumbered Contracts. Encumbered contracts that have remaining balances on December 31, 2006 will be converted into AdvantageME as General Accounting Encumbrance (GAE) or clone documents on January 1, 2007. Unlike a contract, a GAE is a Financial document, not a Procurement document. This means that payments can be made against the GAE, but it cannot be amended in the same way a contract can.

If a contract that has been converted to a GAE needs to be amended, the issuing department must use this procedure:

1. Create a CT document in AdvantageME. This document must include:

- a reference to the dollar amount of the original contract
- the dollar increase or decrease of the contract
- the amended scope of services
- any change to the term of the contract
- the original encumbrance number assigned by Purchases in the **Extended Description** field.

2. If the dollar amount is increasing, enter account coding and dollar amounts *only for the amount of the increase. Remember that the amount originally encumbered is still encumbered in the associated GAE.* Use Event Type PR05 (encumbering). From the time the CT amendment is approved, the remaining contract payments will be made through two vehicles:

(a) Copy forward from the GAE to a GAX and

(b) copy forward from the CT to a PRC

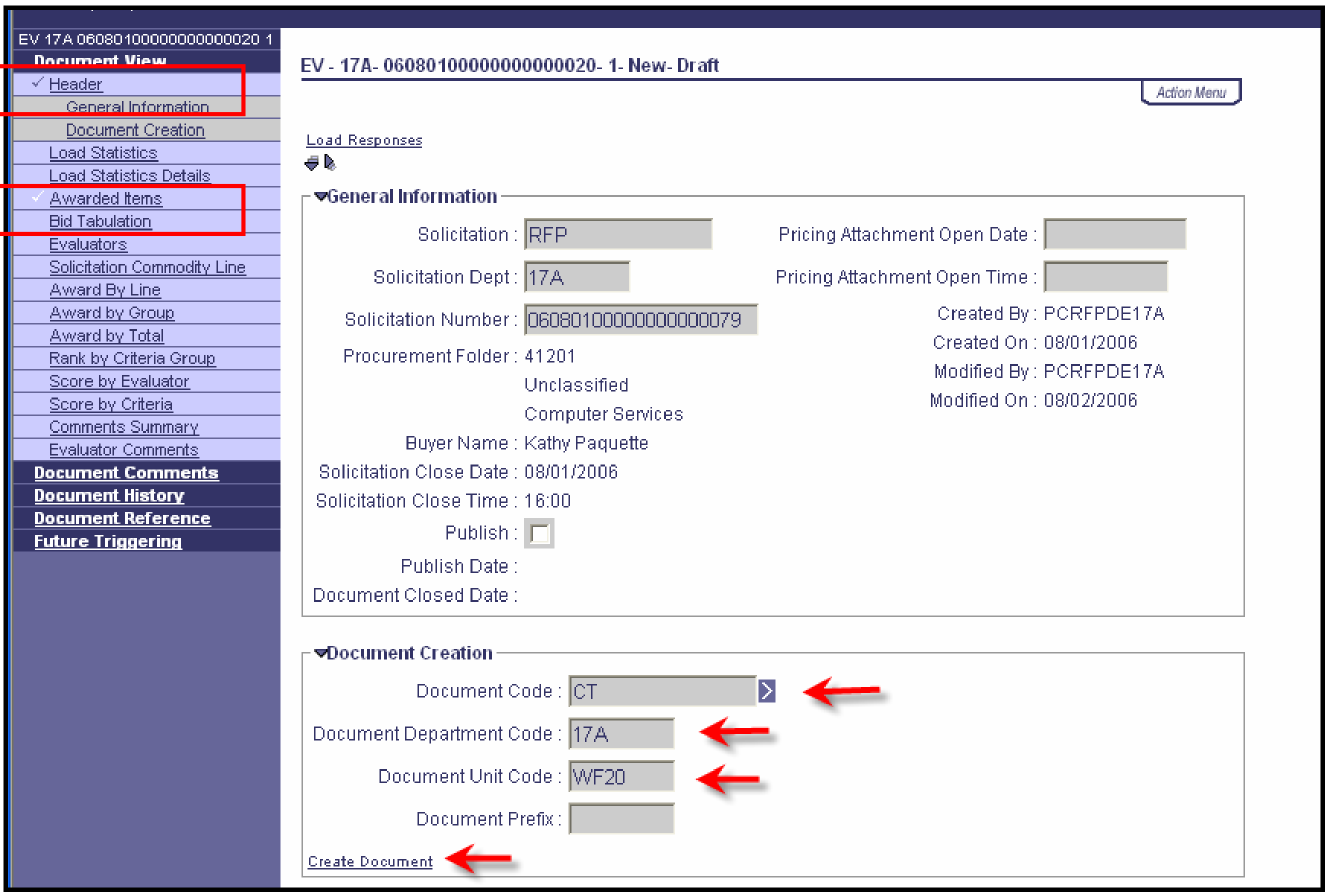
3. If the dollar amount of the contract is decreasing, use Event Type PR07 (non-encumbering) on the CT. Then, modify the GAE to reduce it by the appropriate amount. Changes to GAEs that are created from encumbered contracts on 1/1/07 will have unique identifiers and special workflow setup that will route them to the Division of Purchases (DOP) for approval. DOP will match the modified GAE to the disencumbering CT before approval.

Unencumbered Contracts. Unencumbered contracts will not be converted into AdvantageME, but will need to be set up in AdvantageME by the issuing departments before payments can be made against them. Agencies should follow the procedures within this material for creating CTs in AdvantageME.

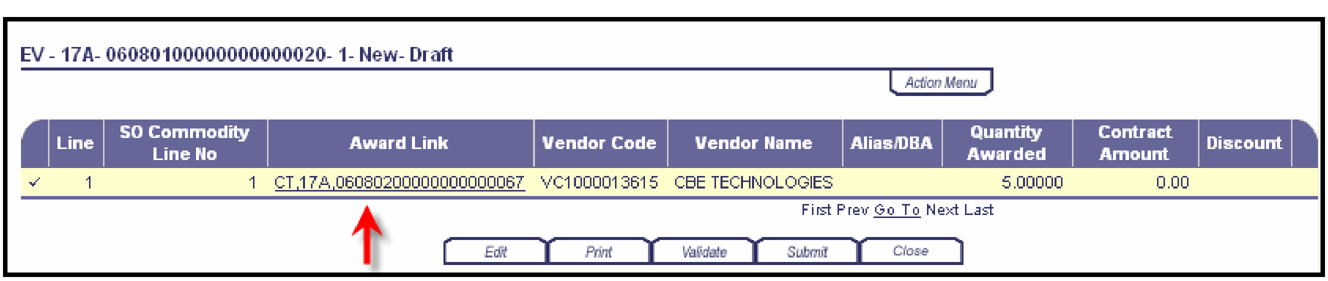
Award Created from RFP Document (BP54)

A BP54 contract can be created from the RFP solicitation, via the Header line of the EV document.

In order to create the contract, click **Header** on the Secondary Navigation panel. Enter the document identifier information in the **Document Creation** section. Click Create Document.

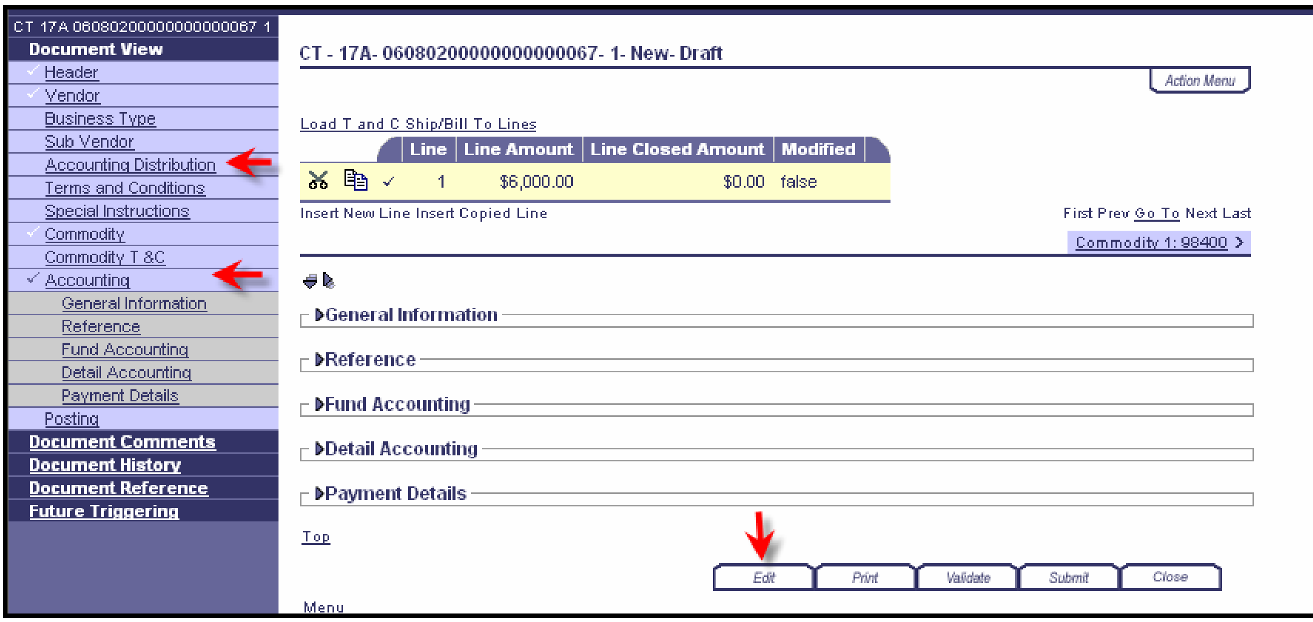


Click **Awarded Items** on the Secondary Navigation panel. The award document appears. Click the link and the award document page will open.



When the document opens, you will see all information is inferred from the RFP on the Header, Vendor and Commodity line, so the only information you need to add is your accounting information. You can do this by either selecting the Account Distribution or Accounting from the Secondary Navigation panel. You will need to click **Edit** first.

You would use Account Distribution if you are splitting by percent, and you would use Accounting if you want to split by dollars. If you are not splitting accounts, you can choose either one. Both the Accounting Distributions and Accounting lines are detailed in the next section; please refer to that section to review the required fields.

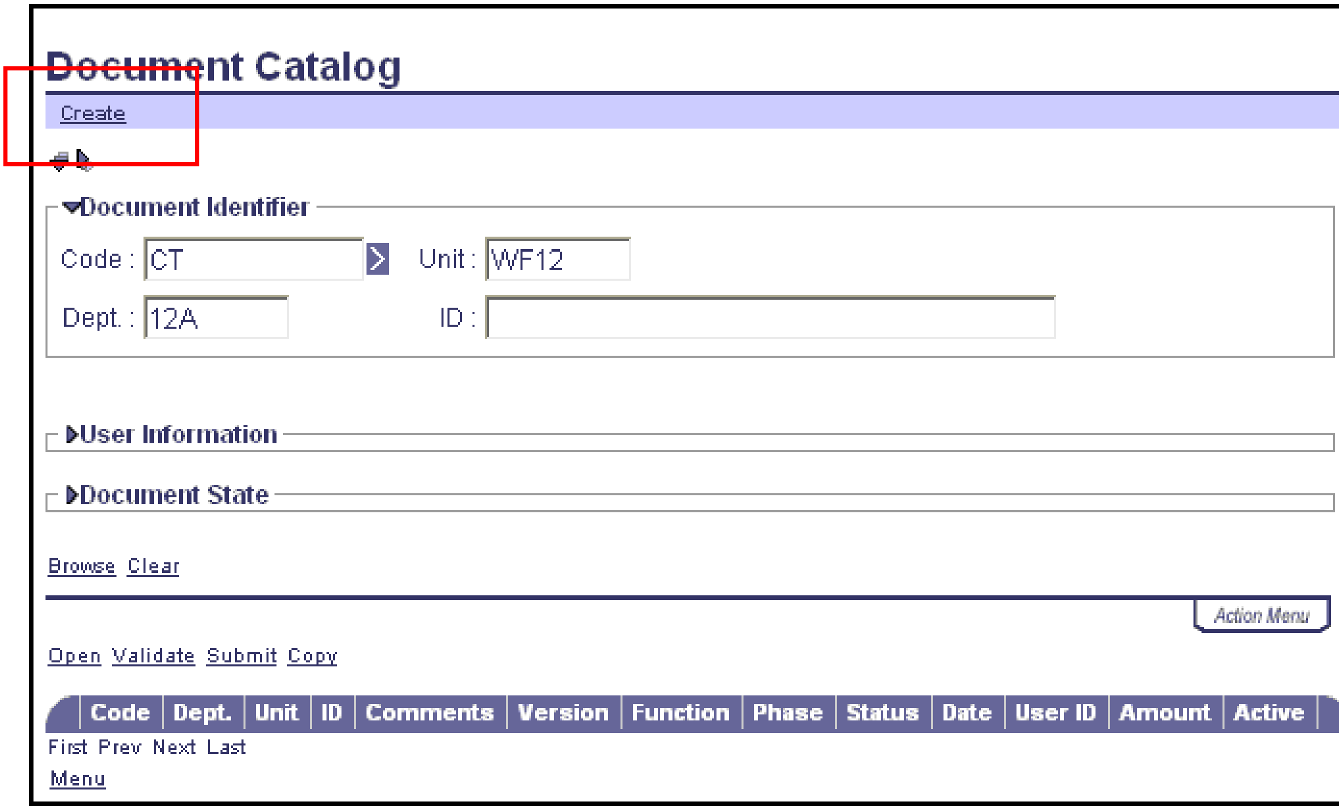


Validate and submit the document.

Go to Exercise 2 to Create an Evaluation (EV) document and a BP54 Contract (CT) document

Standalone Award (BP18R)

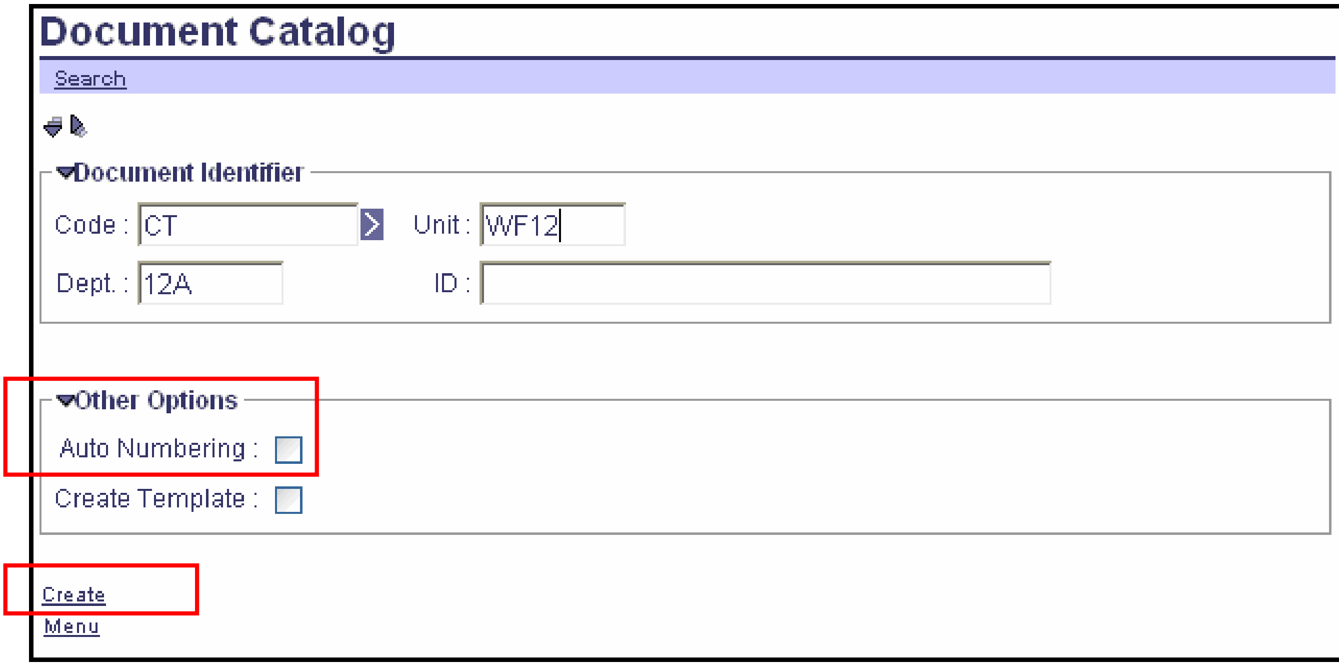
To create either contract manually, enter **CT** in the **Code** field, the **Agency number** in the **Dept.** field, and the **Unit code** in the **Unit** field. Click Create.



The following document will appear:

Check the **Auto Numbering** box. (The **ID** field should ALWAYS remain blank.)

Click **Create.**



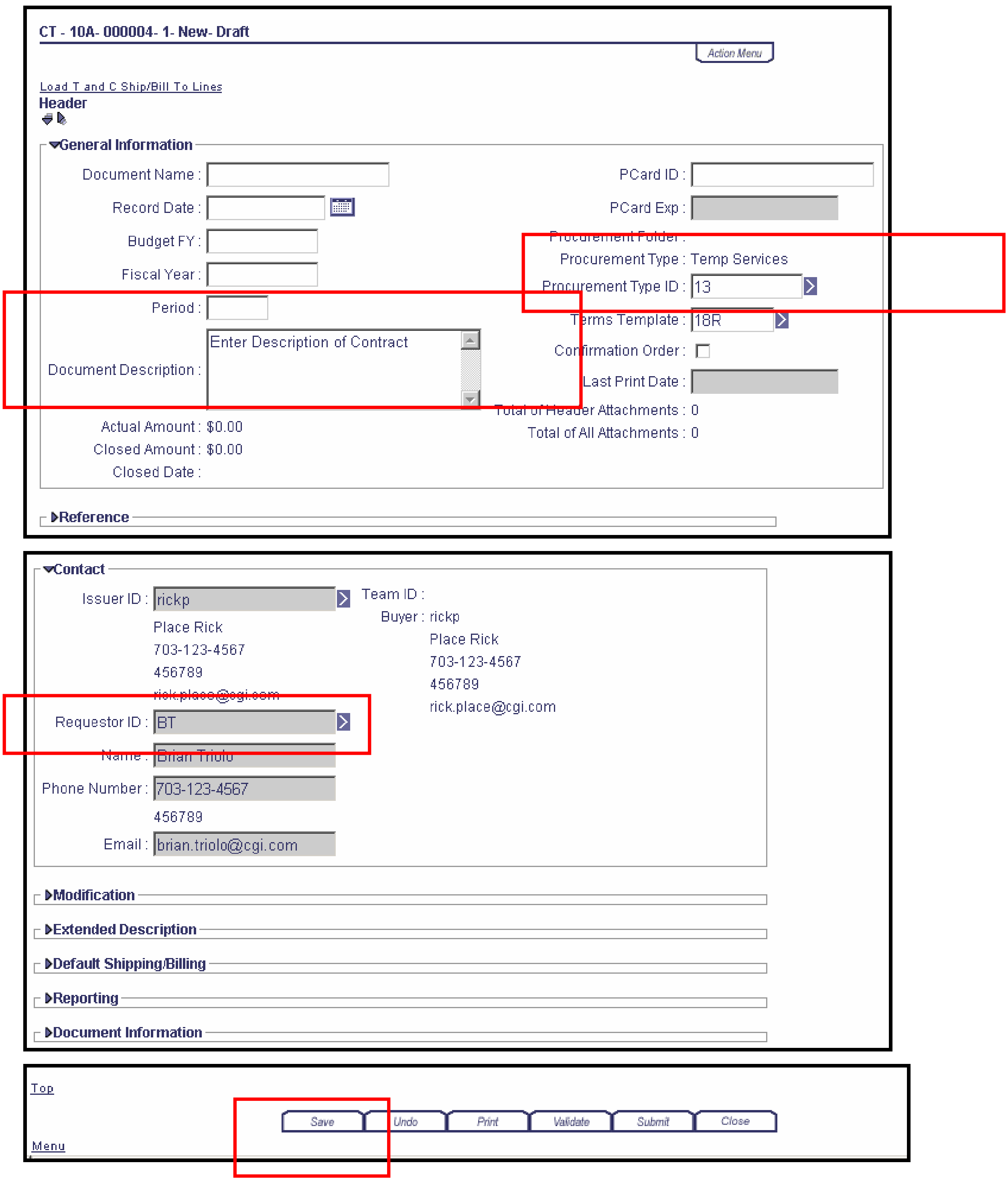
A new CT (contract) document will open.

In the **Document Description** field, enter a brief description of the contract.

In the **Procurement Type ID** field, click the Pick list and choose the appropriate selection (BP54, BP18, Temp Services, or Cooperative Agreement); this is a required field.

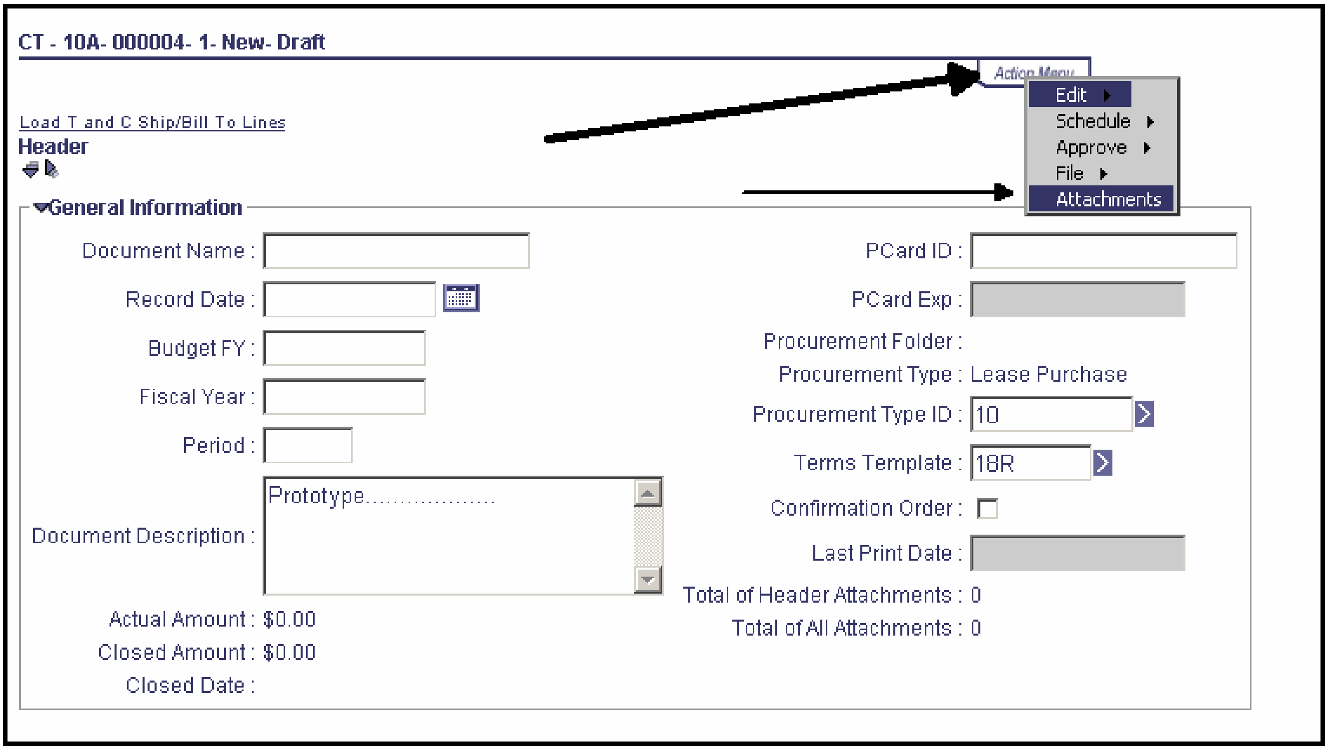
Open the **Contact** section of the Header; choose a Requestor from the pick list.

Click **Save**.

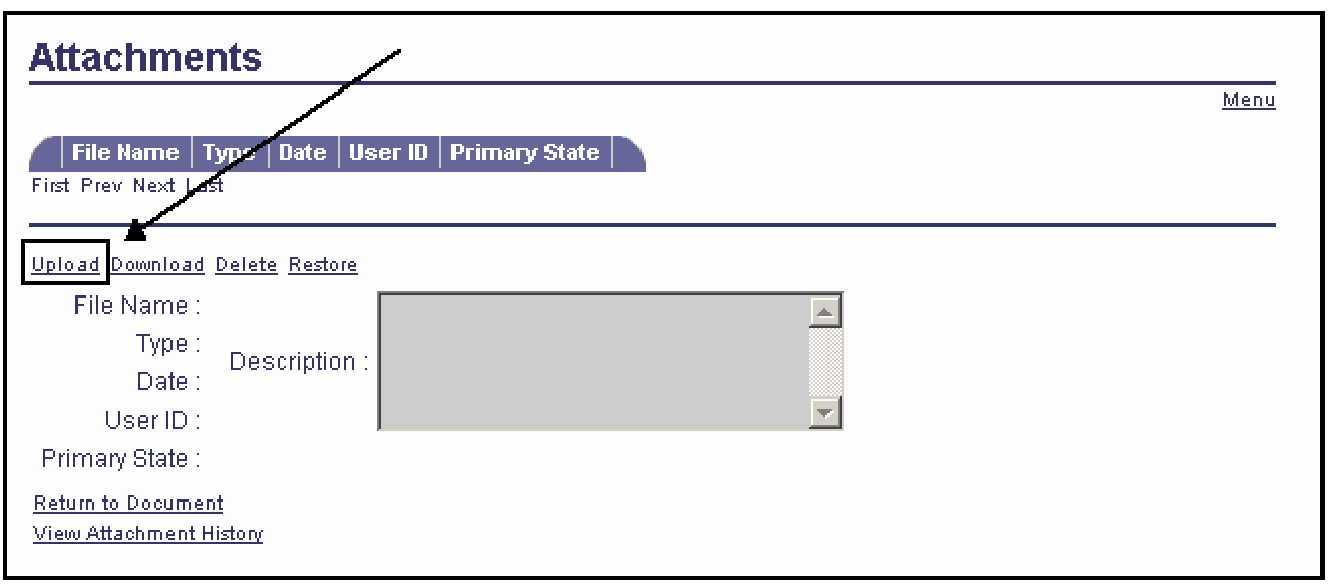


To attach a document, often the standard BP18 or BP54 with a scanned signature page:

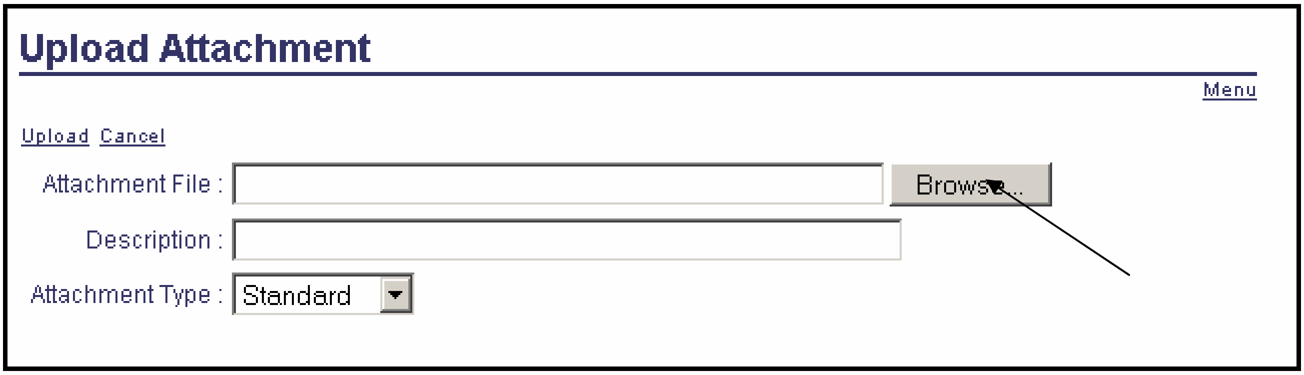
To attach a document, click **Action Menu→Attachments**.



Click **Upload**.

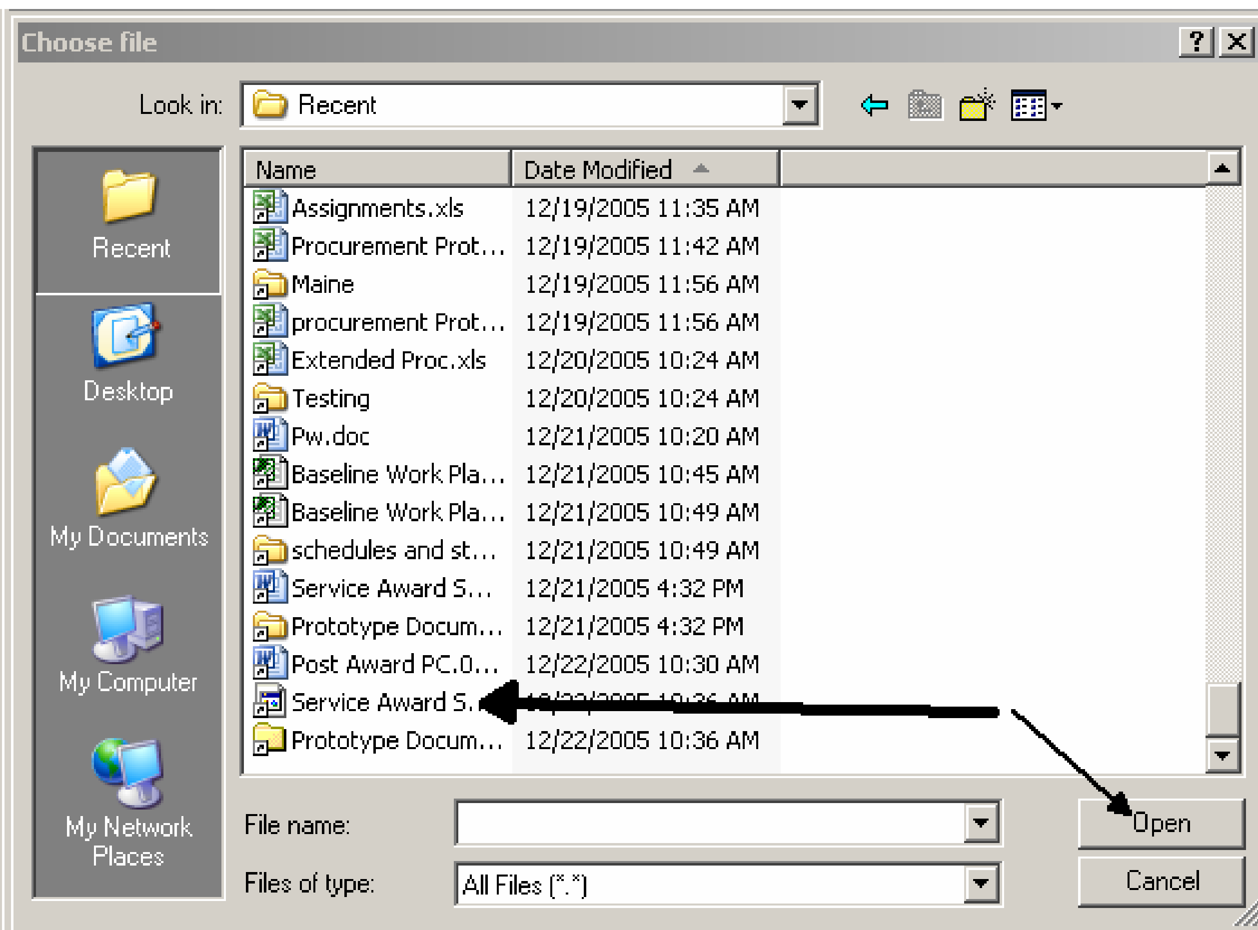


Click **Browse** to search for the attachment.

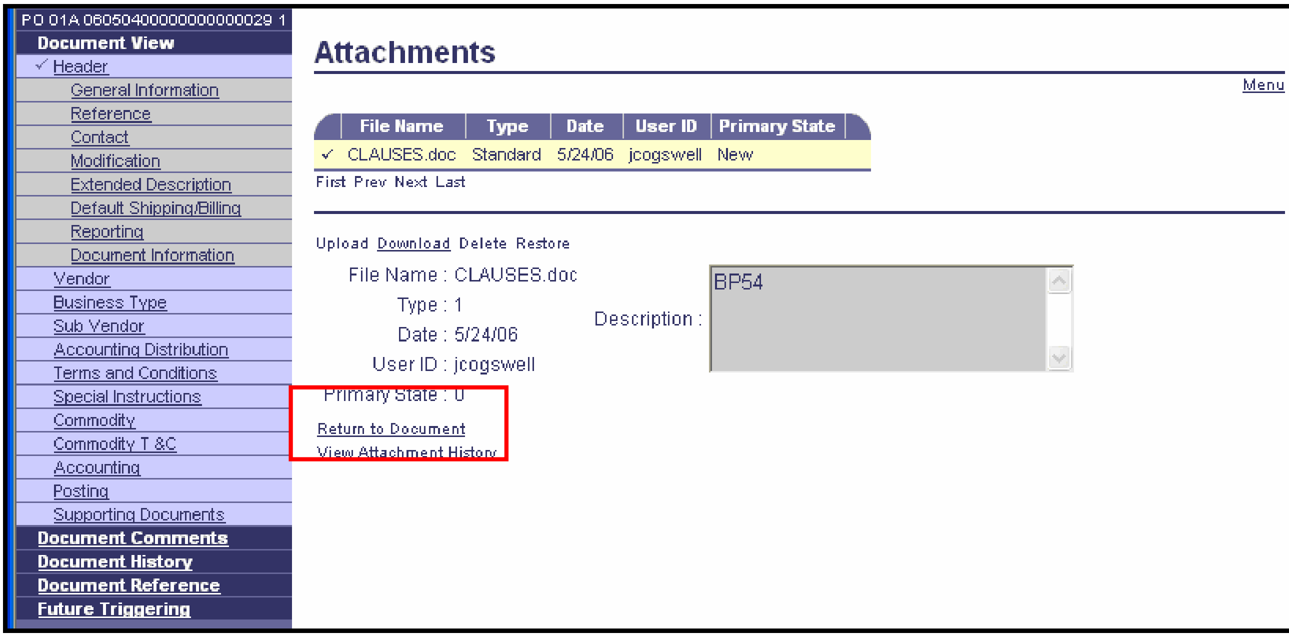


The following is displayed and it functions as a standard Windows selection function:

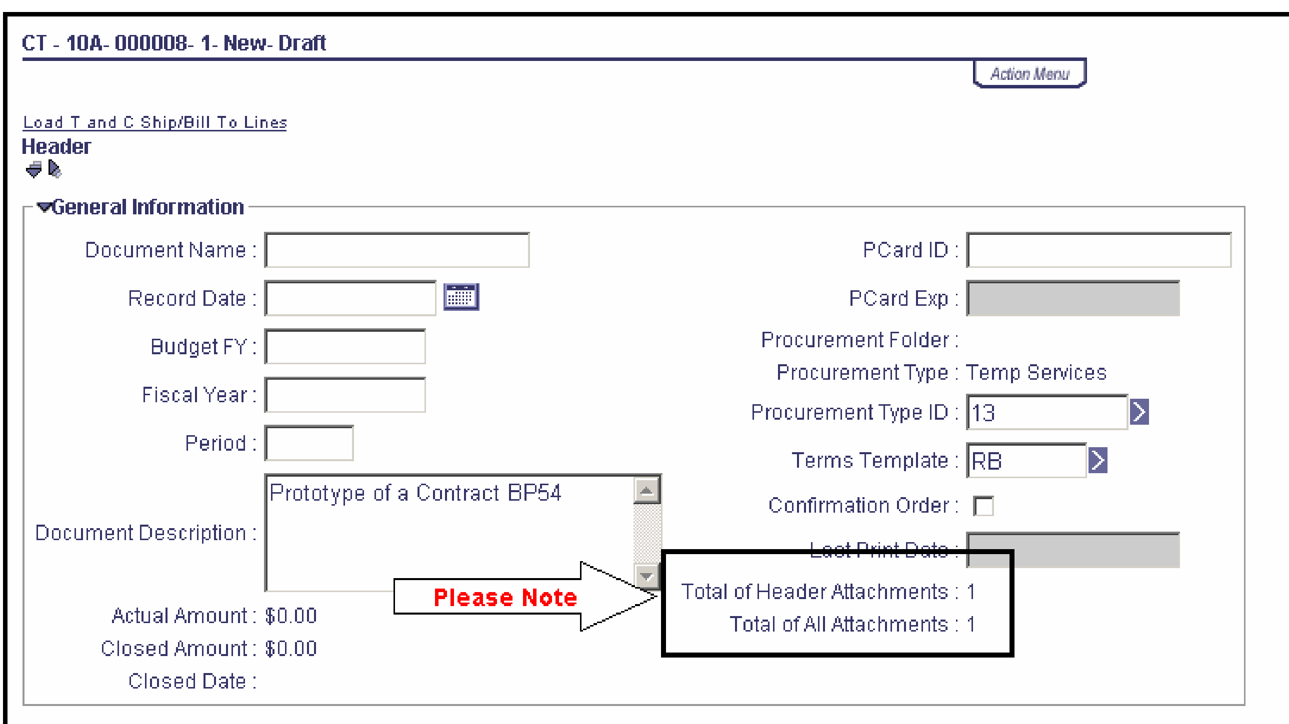
Attach the file and give it a description and then click on Upload



Click Return to Document to leave the attachment section



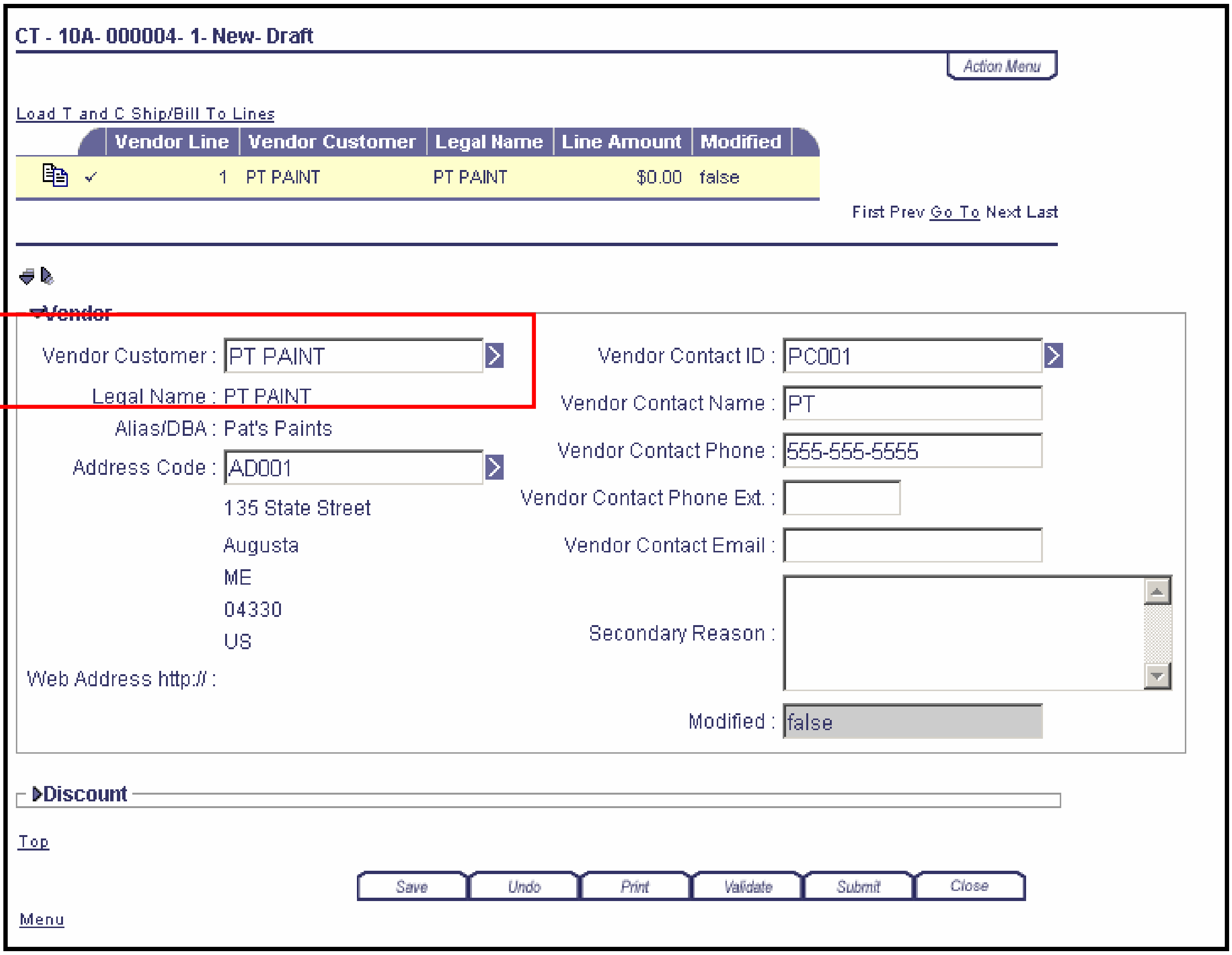
Note: If Temp Services, attach Chapter 155 Supplemental Information Sheets by clicking **Attach** via the **Action Menu**. Once the item is attached, you see the following:



To select the vendor, click **Vendor** from the Secondary Navigation panel.

Next to the Vendor Customer field, click the Pick List to choose an appropriate vendor.

Click **Save**. This will bring in all the relevant vendor information.

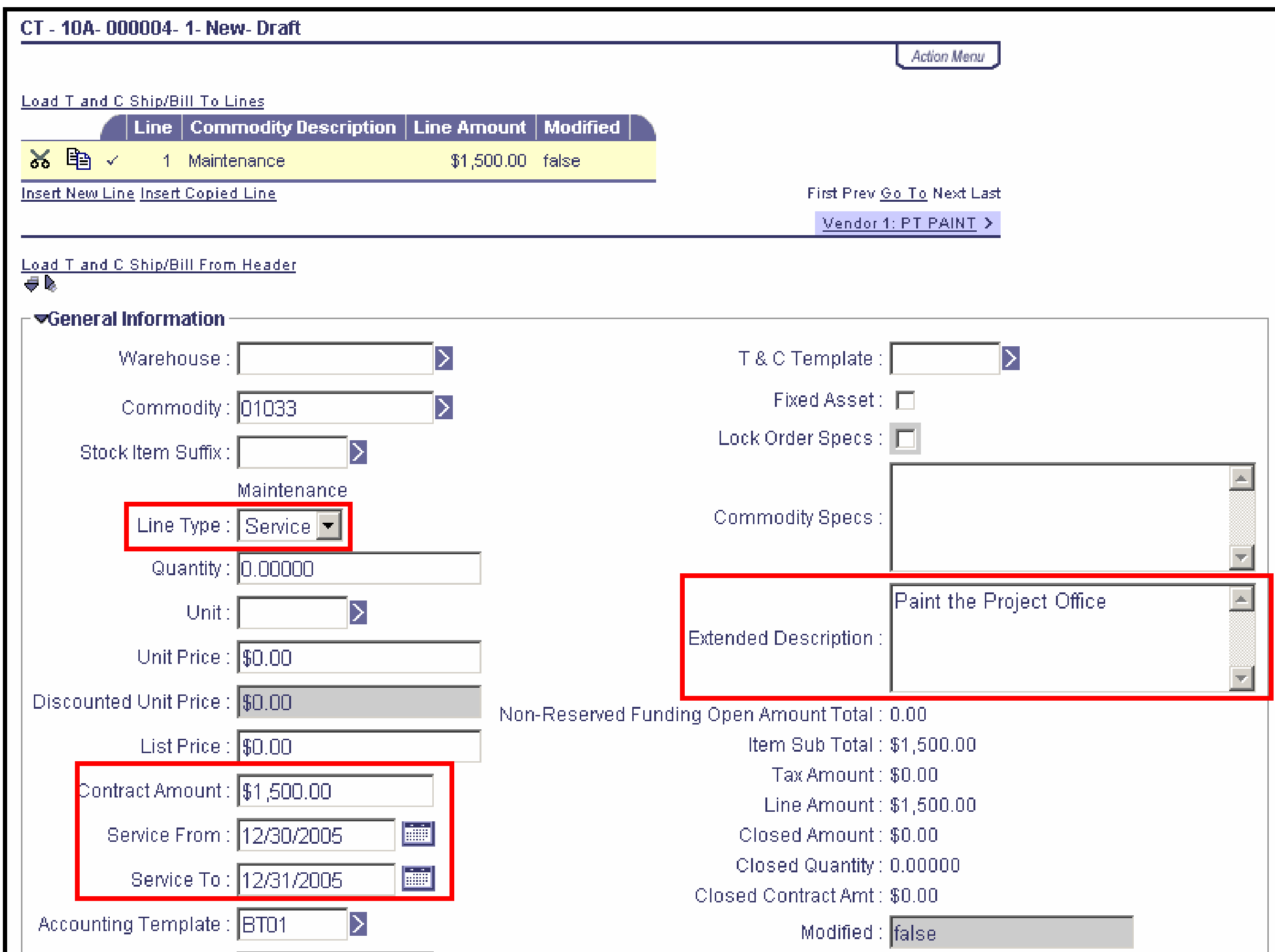


To add the Commodity, click **Commodity** from the Secondary Navigation Panel. Please note that "Commodity" as used in AdvantageME includes what we have traditionally thought of as services. The five-digit NIGP codes for services all start with the number 9.

Click Insert New Line.

Populate the following fields:

- Commodity (i.e. Consultation)
- Extended Description of service to be performed (Scope)
- Enter Shipping Location and Billing Location in the Shipping/Billing section.
- Set Line Type to Service.
- Complete the Service From/To dates.
- Enter contract amount.

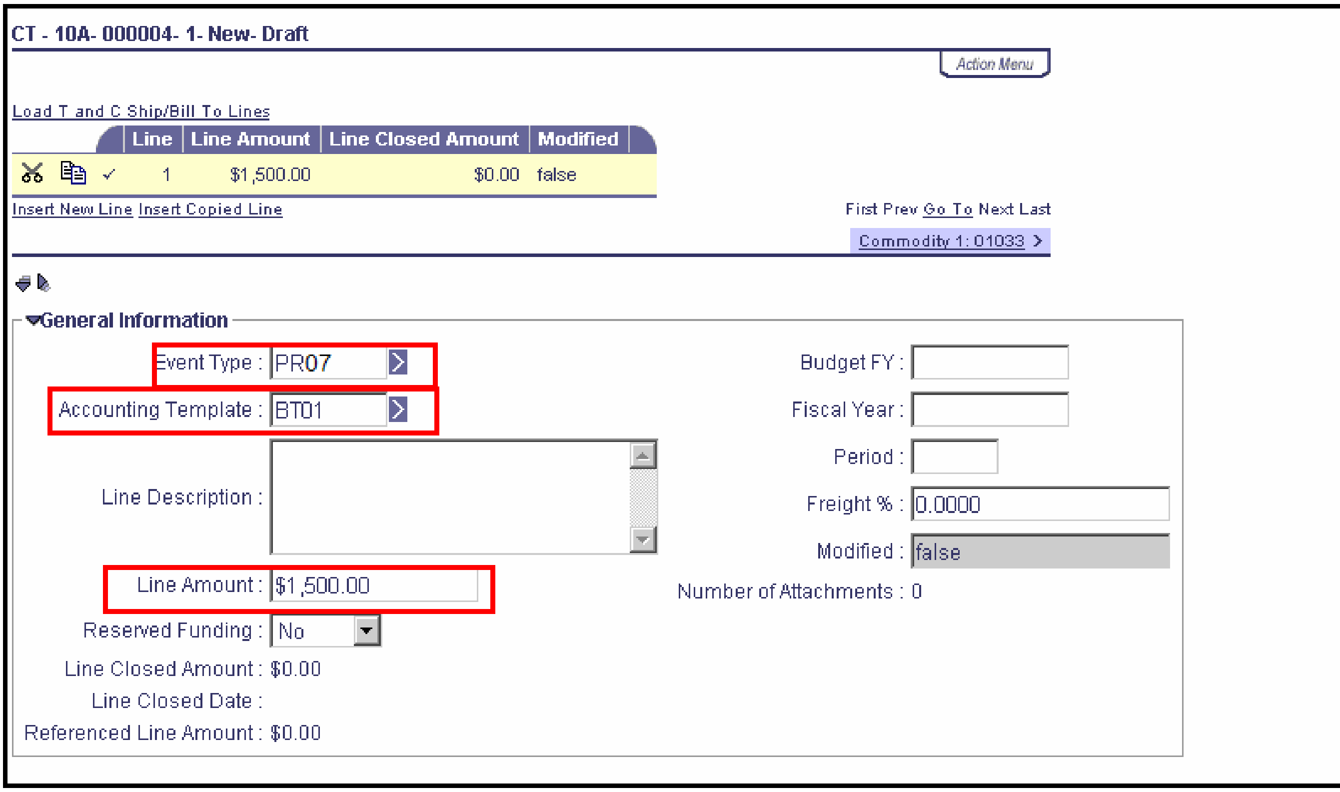


To add the accounting line, click **Accounting** from the Secondary Navigation panel.

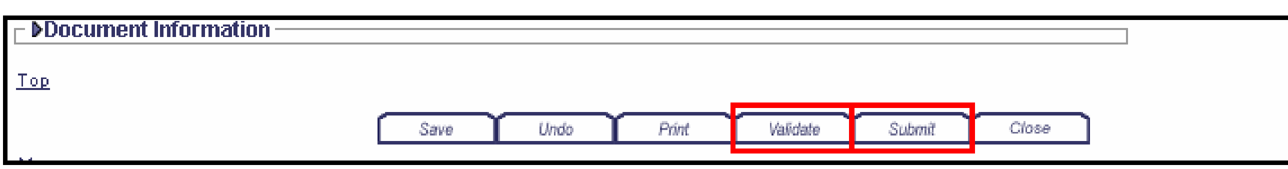
Click Insert New Line.

Populate the following fields:

- Event Type—use PR07 for non-accounting
- Accounting Template (or complete the chart of account elements in the Fund Accounting section)
- Line Amount



Click **Validate**. Check for any errors. Click **Submit**.



Approval Process:

1. Dept Approver: Approves document.

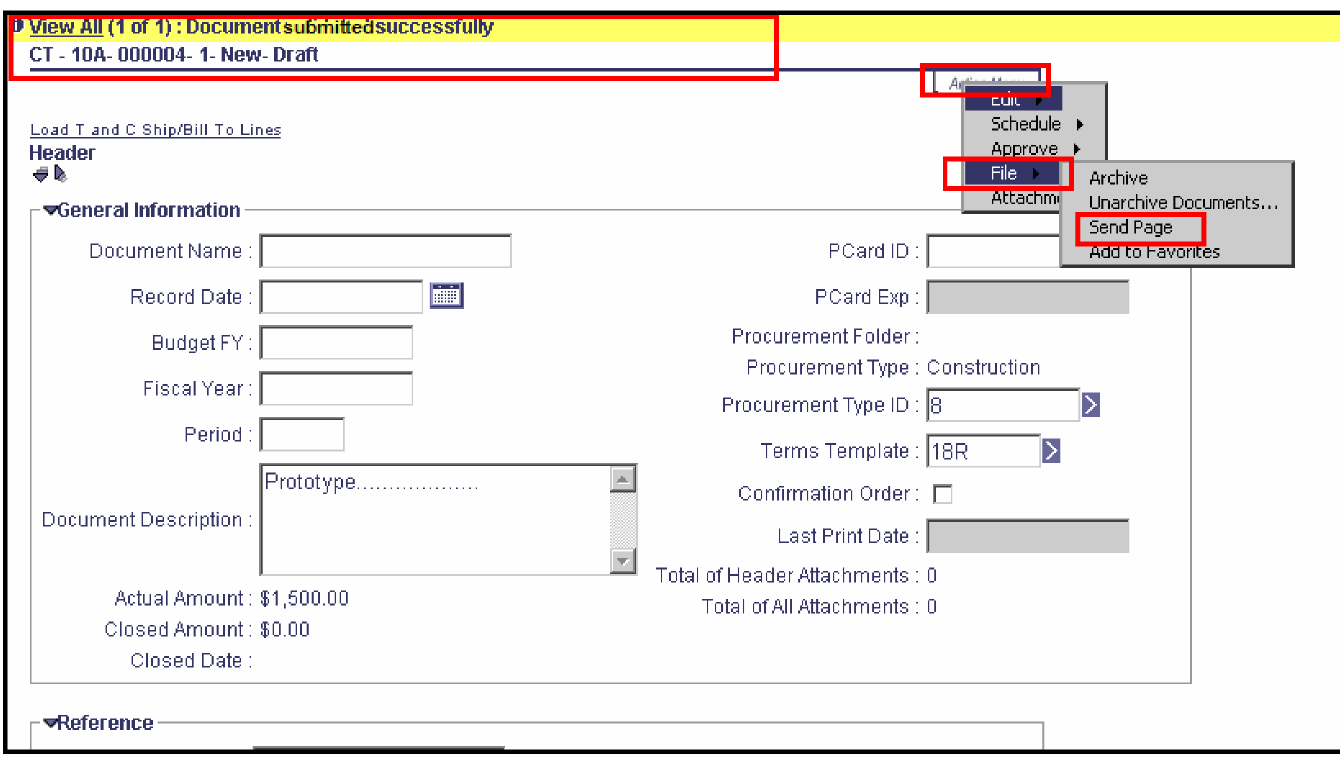
2. If the CT is less than or equal to $2500, the CT will workflow to the agency approver and then to the Division of Purchases for review

If the CT is greater $2500, the CT will workflow to the agency approver, Dept Designee and then to the Division of Purchases.

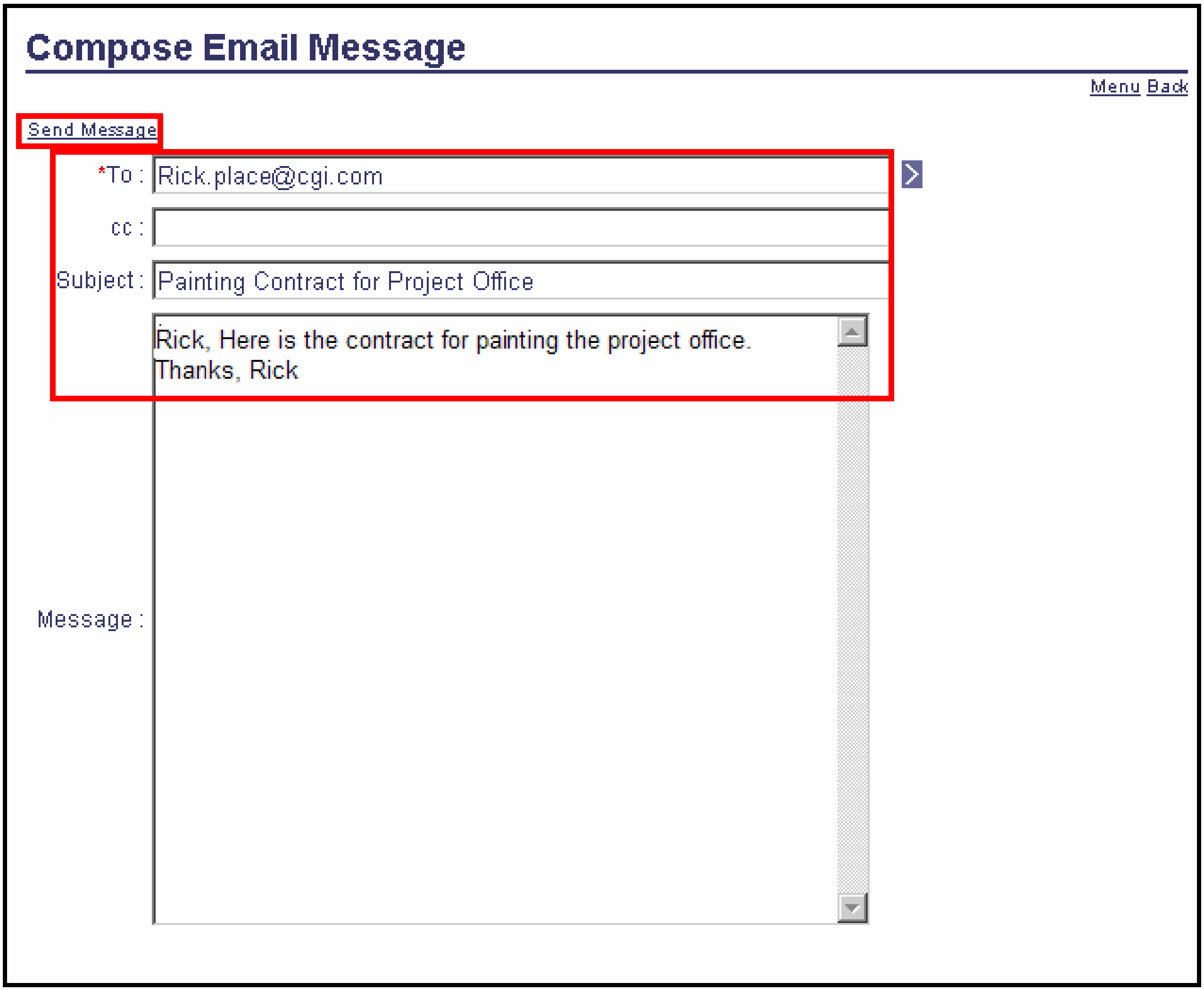
3. Division of Purchases Approver: If there are errors, use Reject to send CT back to department, and document the corrections to be made in Approval Comments. Use Send Page to notify RFP/Contract user.

4. Division of Purchases Approver: If there are no errors, Division of Purchases approval finalizes document and establishes encumbrance (if encumbering). Use Send Page for CT to notify department.

If there are no errors in the document, then the document is sent to the Requesting Department using Send Page from the **Action Menu**.



Enter the email address, a subject and a brief message and then click Send Message.



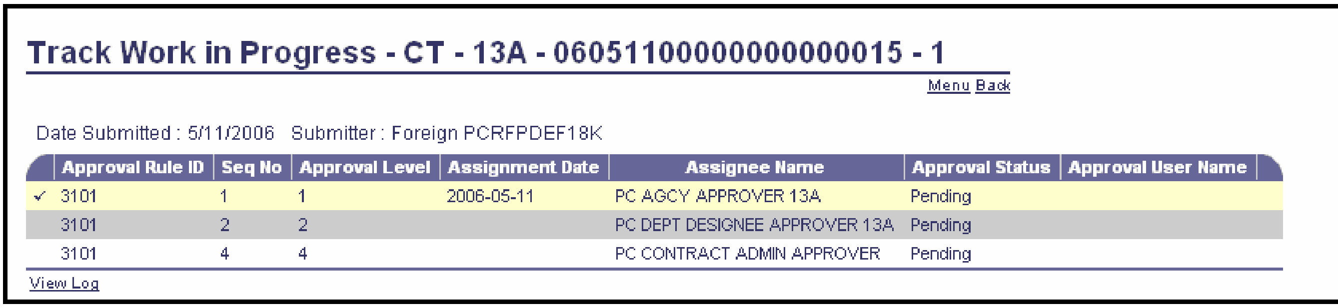
RFP/Contract user—Upon final approval, prints the Adobe form for CT document.

RFP/Contract user—Email PO to vendor.

Check the Status of the Order

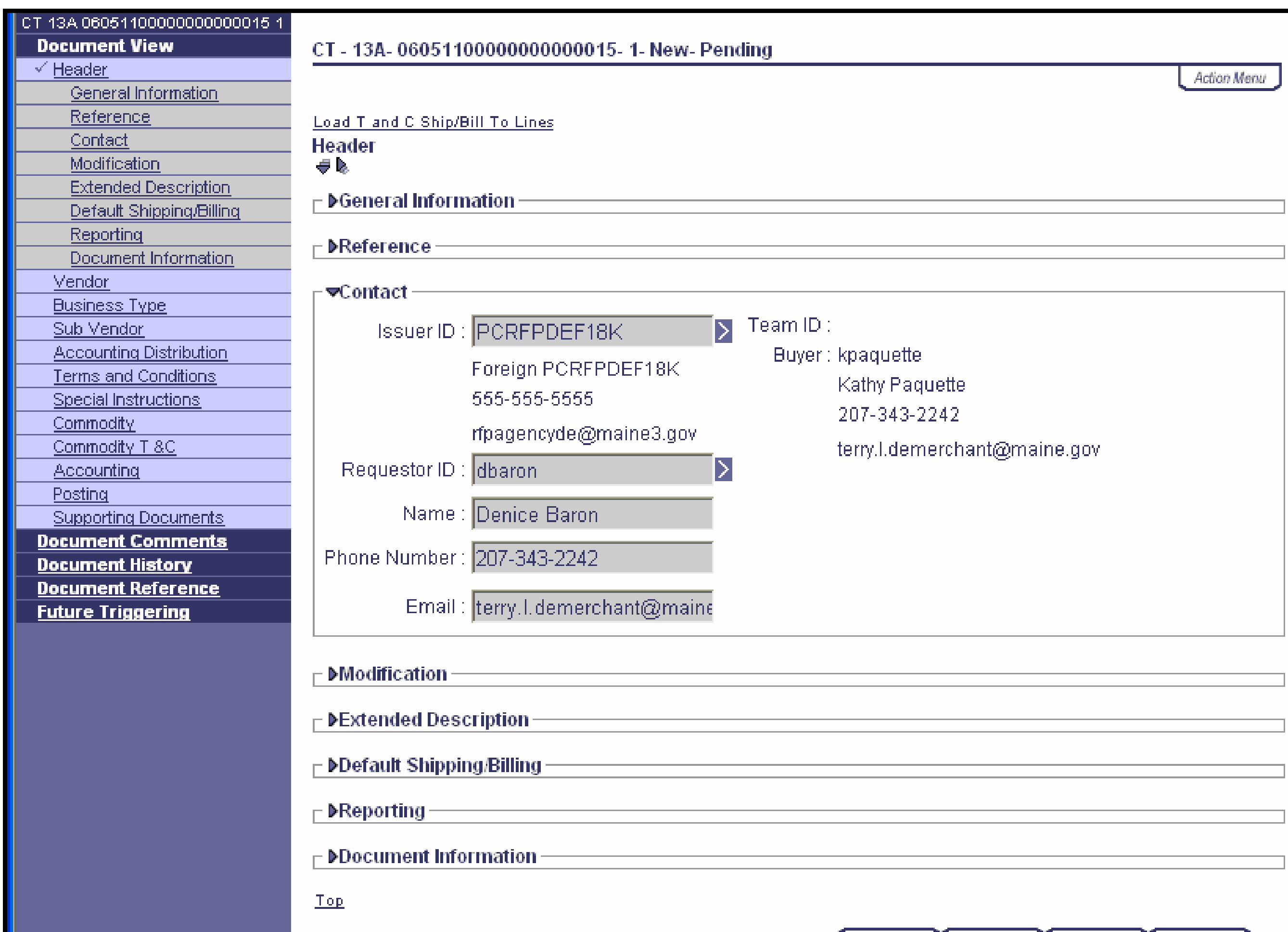
If you do not have your procurement folder ID, you can go to the Document Catalog User Information to enter your user id. This pulls up all of your documents. Locate your document and click on the contract number link to bring up your contract.

Track approvals: Go to the Action Menu→Approval→Track work in Progress



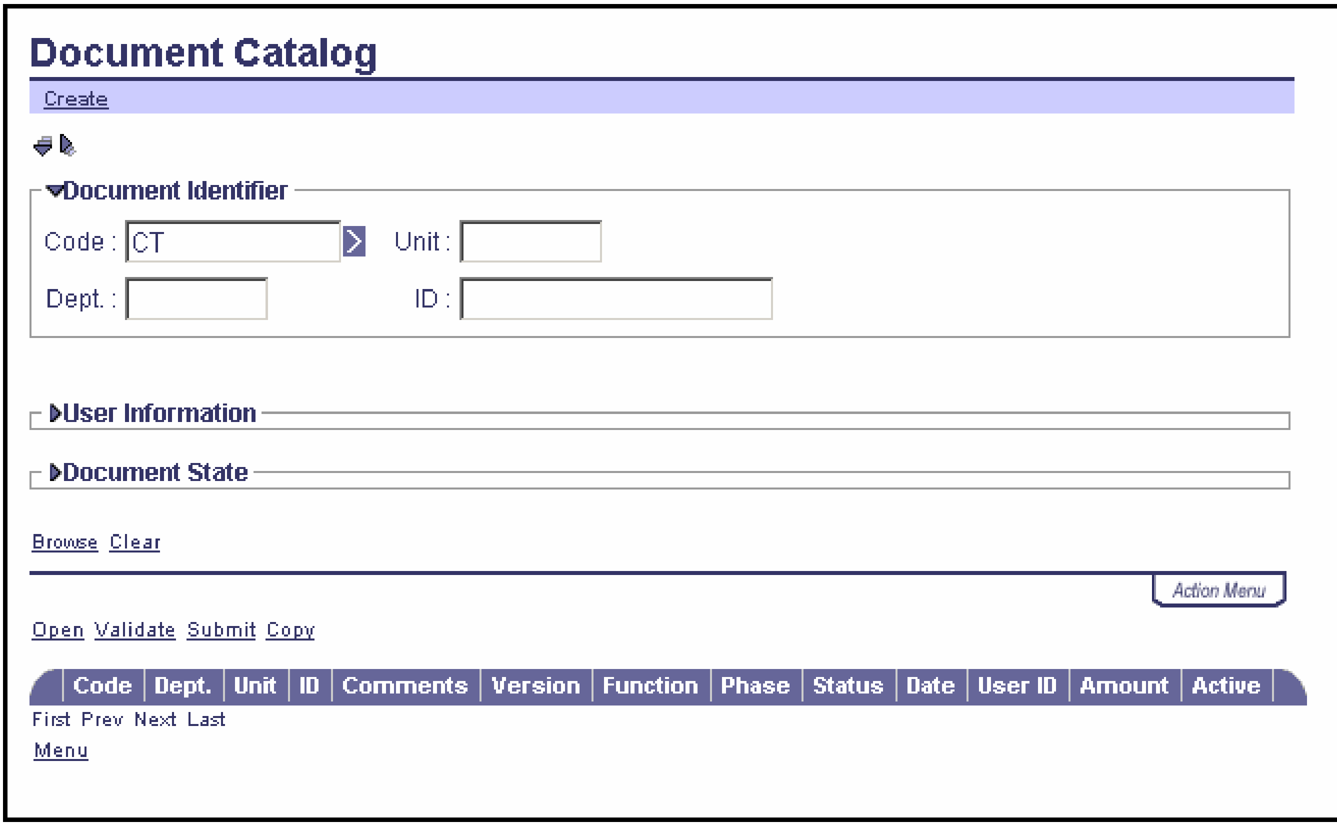
Approval Rule ID	Seq No	Approval Level	Assignment Date	Assignee Name	Approval Status	Approval User Name
✓ 3101	1	1	2006-05-11	PC AGCY APPROVER 13A	Pending	
3101	2	2		PC DEPT DESIGNEE APPROVER 13A	Pending	
3101	4	4		PC CONTRACT ADMIN APPROVER	Pending	

Go back to document contact section on the Header to view buyer

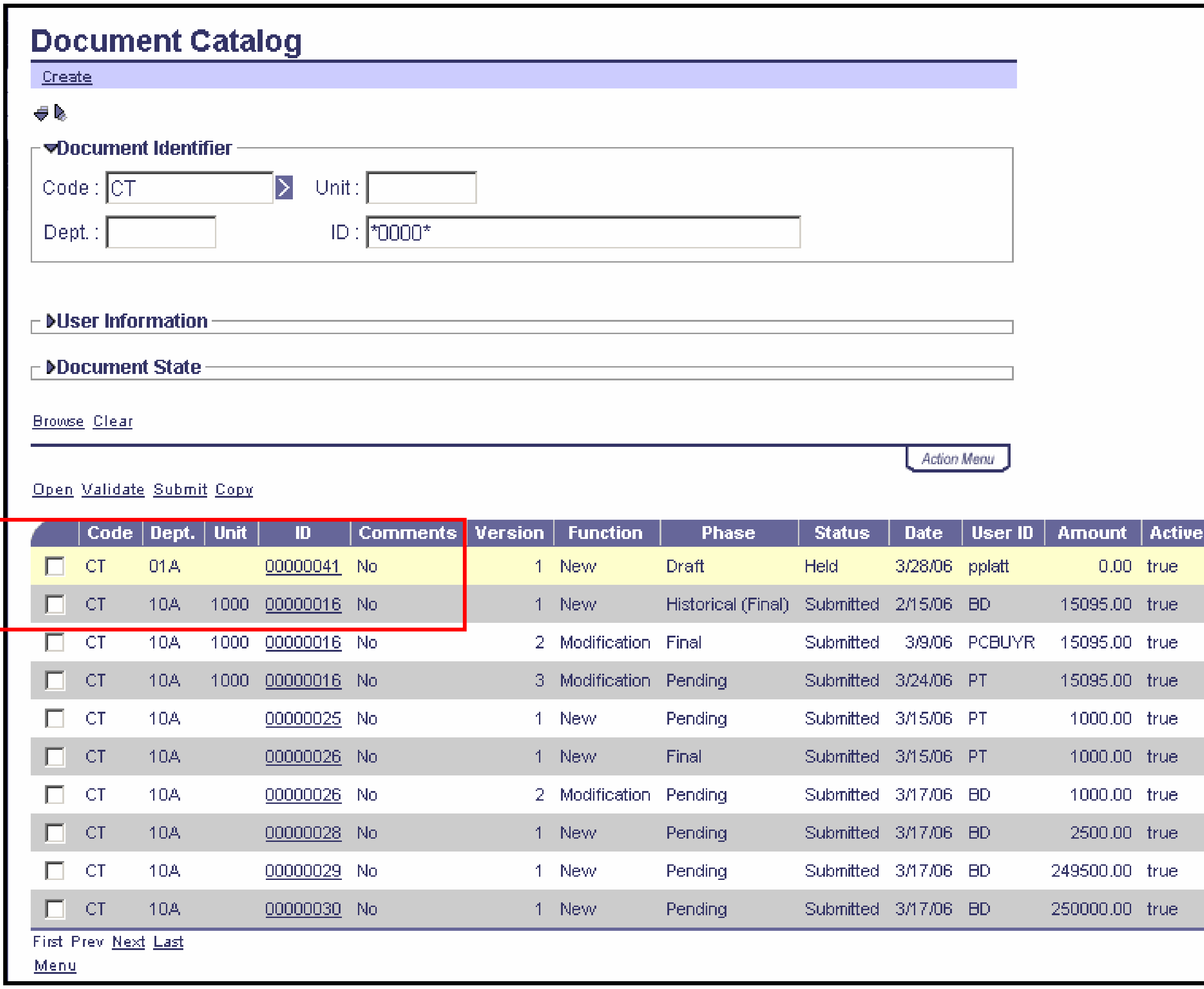


To Create a CT from an existing CT

Enter **CT** in the Code field, the **Agency number** in the Dept. field, and the **Unit code** (workflow unit) in the Unit field. If you know the previous contract ID number, you can populate the **ID** field. Click Browse.



Click the Check Box next to the contract from which you want to copy the information. Click Copy.



Document Catalog

Create

Document Identifier

Code : CT Unit :

Dept. : ID : *0000*

User Information

Document State

Browse Clear

Action Menu

Open Validate Submit Copy

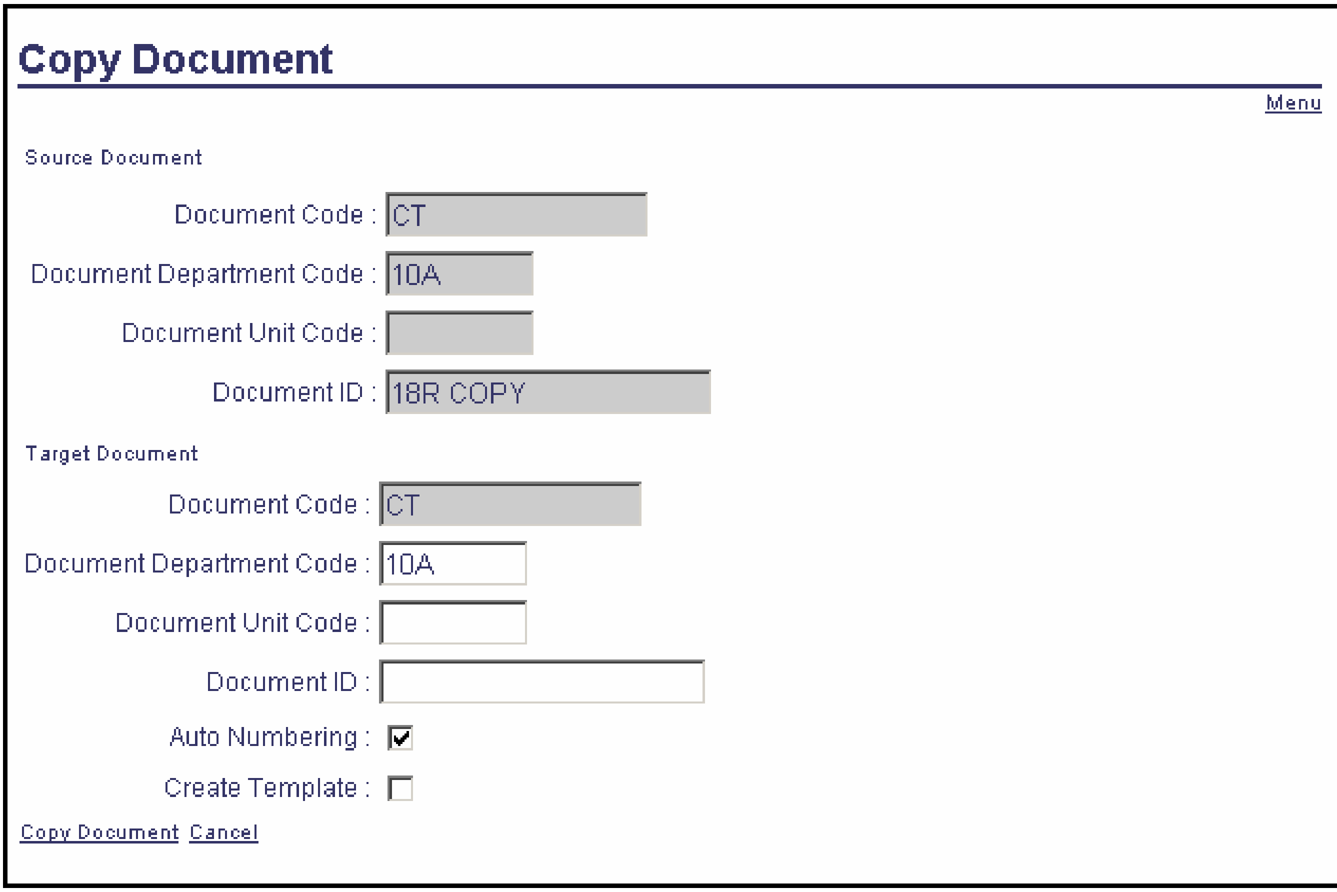
	Code	Dept.	Unit	ID	Comments	Version	Function	Phase	Status	Date	User ID	Amount	Active
☐	CT	01A		00000041	No	1	New	Draft	Held	3/28/06	pplatt	0.00	true
☐	CT	10A	1000	00000016	No	1	New	Historical (Final)	Submitted	2/15/06	BD	15095.00	true
☐	CT	10A	1000	00000016	No	2	Modification	Final	Submitted	3/9/06	PCBUYR	15095.00	true
☐	CT	10A	1000	00000016	No	3	Modification	Pending	Submitted	3/24/06	PT	15095.00	true
☐	CT	10A		00000025	No	1	New	Pending	Submitted	3/15/06	PT	1000.00	true
☐	CT	10A		00000026	No	1	New	Final	Submitted	3/15/06	PT	1000.00	true
☐	CT	10A		00000026	No	2	Modification	Pending	Submitted	3/17/06	BD	1000.00	true
☐	CT	10A		00000028	No	1	New	Pending	Submitted	3/17/06	BD	2500.00	true
☐	CT	10A		00000029	No	1	New	Pending	Submitted	3/17/06	BD	249500.00	true
☐	CT	10A		00000030	No	1	New	Pending	Submitted	3/17/06	BD	250000.00	true

First Prev Next Last

Menu

Enter Document Department Code, Document Unit Code.

Check **Auto Numbering**. Click Copy Document.



The document header page opens and you can change all information that needs to be changed.

Extend and Amend the BP54 contract

To extend: Copy forward to a renewal (RN) document

Attach the revised BP54 document

To amend: click **Edit** on the CT document

Attach the Signed Amendment page to the CT Header

Go to Exercise 3 to Create a BP18R Contract (CT) document

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8—Post Award

Two post award documents are detailed in the section:

1. Performance Evaluation (PE) document
2. Termination (TM) document

View or record Post Award activities in:

- Post Award State Viewer on the PRCUID table—used most commonly for PE, TM and RN

The Post Award State documents do not have any event types tied to them, as they do not perform any accounting updates upon submission.

- Post Award documents cannot be referenced by any other document within Advantage Procurement

Performance Evaluation (PE)

In order to document a Vendor's record at meeting their contractual obligations, users should complete the Vendor Performance Evaluation (PE) document. The data entered on the PE document is a factor in determining whether a Vendor should receive future Awards or have an existing Master Agreements renewed.

Performance evaluation process:

1. Evaluator(s) are assigned on the Vendor Performance Evaluator table by the buyer
2. Evaluator(s) is chosen on the PE document
3. Buyer loads Procedures and Evaluation Criteria
4. Once the PE is created, evaluators are notified via email
5. Evaluator follows procedures
6. Evaluator ranks Evaluation Criteria
7. Buyer reviews all PE's and determines whether contract should be renewed or terminated

Evaluations are standardized based on the Procurement Type on the award document.

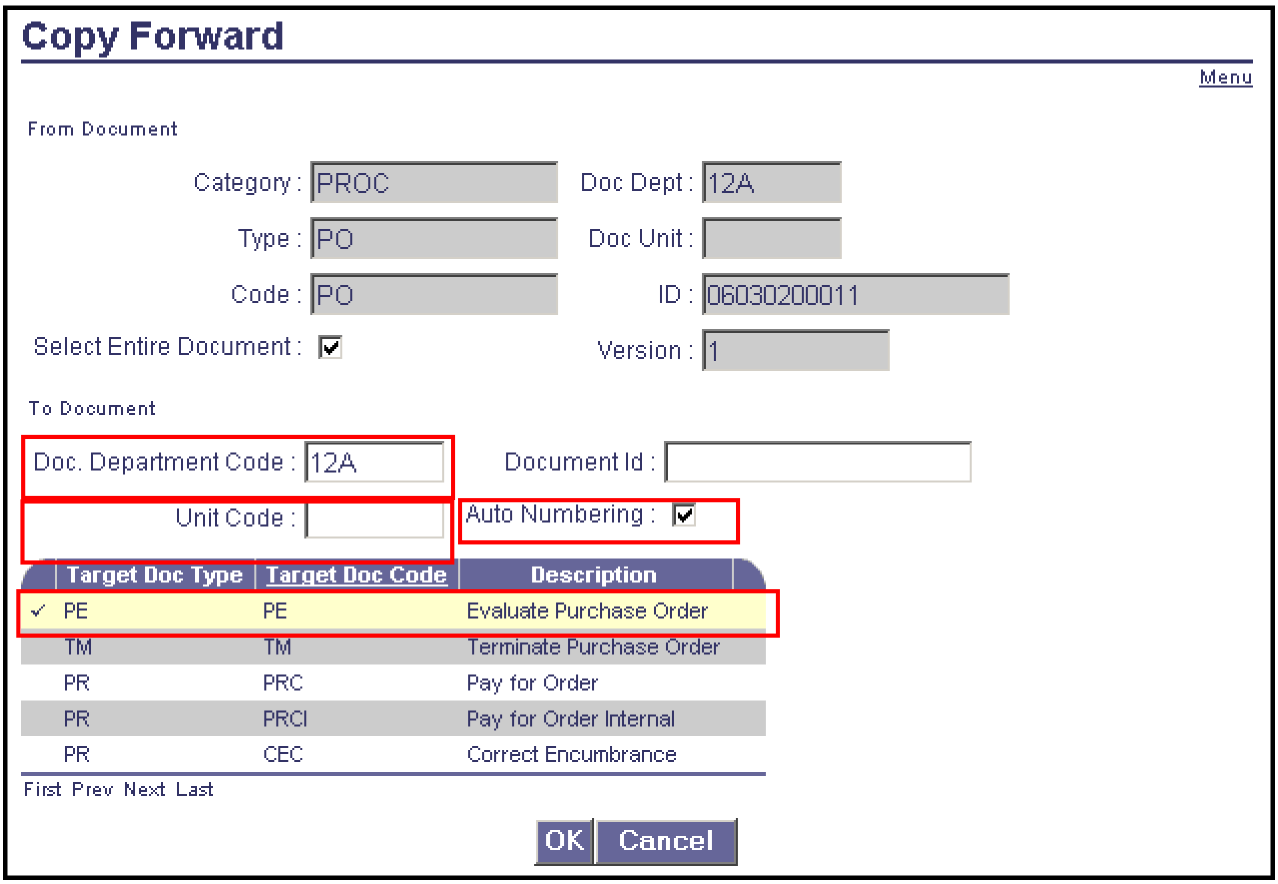
Evaluations can only be performed with reference to awards established in the system.

Create a PE document

To complete a Vendor Performance Evaluation complete the following steps:

From the Document Catalog, locate the award being evaluated. Open the award and click the **Copy Forward** button. The Copy Forward page will open.

On the Copy Forward page enter your **Doc. Department Code** and **Unit Code**. Select the **Auto Numbering** check-box to have AdvantageME generate the PE document ID. In the grid section select where the target document code is **PE**. Click **OK** to open the PE document.



The document opens to the Header page. Complete the **General Information** section of the PE. This section is used to establish which AdvantageME user is performing the evaluation as well as the time period being assessed. Note that all the information from the award has automatically populated the PE document.

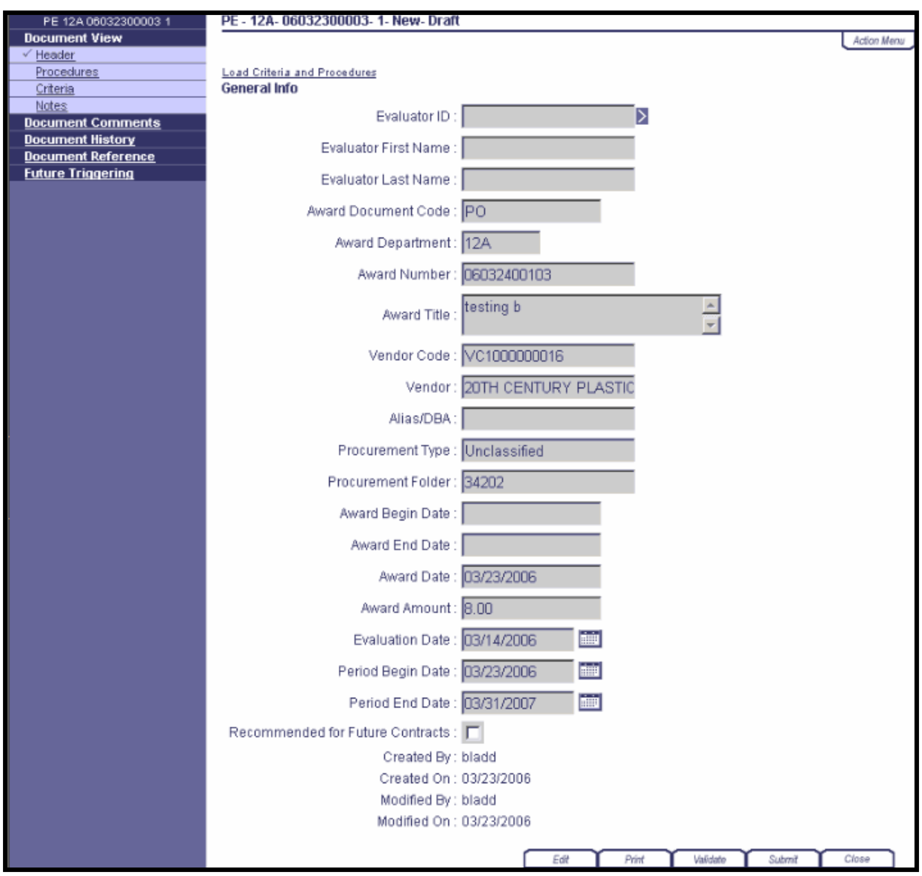
The Header section specifies who will evaluate the award. This relationship was established on the Vendor Performance Evaluator table. The buyer loads the Criteria and Procedures after saving the Header section. Each designated Evaluator will be notified about the Performance Evaluation document via email.

Note: It is the responsibility of the Buyer who established the award to set-up who will be performing the evaluation by making an entry on the Vendor Performance Evaluator (PEEVALR) table at the time the Award is submitted.

Populate the following fields:

- **Evaluator ID**: Type in your User ID- or find your ID from the **Evaluator ID** pick list.
- The **Evaluation Date** is the date this evaluation is being completed. Please enter today's date.
- **Period Begin Date** / **Period End Date**. Please enter the time period being evaluated in military time.

Click Load Criteria and Procedures at the top of the page to load the standardized Evaluation Criteria and the PE document procedures.

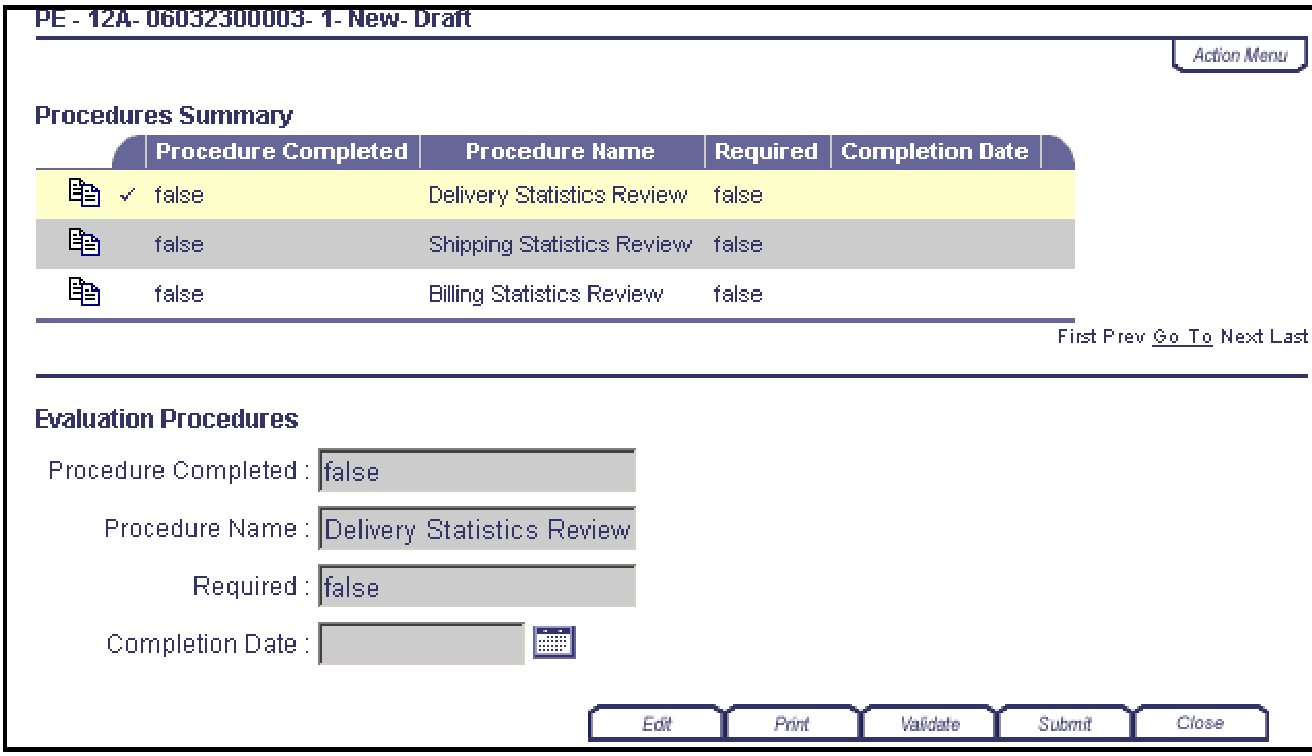


Click **Procedures** in the Secondary Navigation panel to transition to the Document Procedures page.

Document when all mandatory Procedures were completed by entering the date on which they were completed. Procedures are recommended tasks that be performed as part of the performance evaluation process.

The Procedures detail section lists the procedures that were loaded for the award document. The procedures were established on the Document Procedures table. After you have finished a procedure, you can enter the date. If **Required** is set to False you do not have to complete any of these in order to process the evaluation.

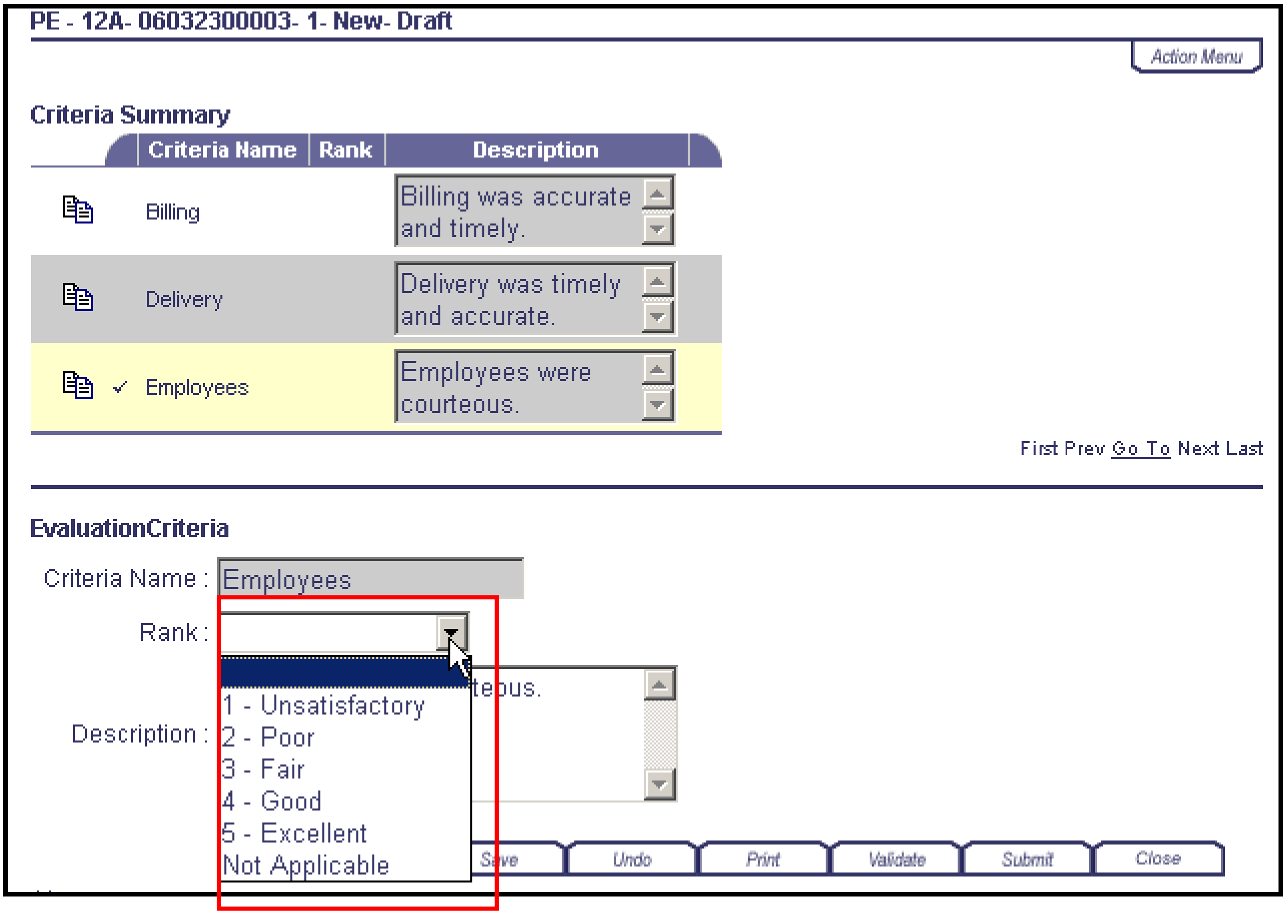
The **Completion Date** is the date on which the Procedure was finished.



Click **Criteria** in the Secondary Navigation panel to access the Evaluation Criteria page. This page lists the Criteria that were loaded from the Vendor Performance Evaluation Template table. You must rank each of the criteria on this detail section.

You will also need to enter notes based on your evaluation on the Notes detail section.

The **Rank** field is used to record your opinion of the Vendors service levels. You must record a Ranking for each criteria that was loaded from the template. The available rankings are Unsatisfactory, Poor, Fair, Good, Excellent or Not applicable.



Click **Notes** in the Secondary Navigation Panel. The Notes page opens where you may record specific comments or anecdotal information supporting your evaluation / assessment.

The **Note** field can record up to 1500 characters of information per Note. Please take the time to enter as much detail about your experience with the Vendor and your assessment of their performance against the award in question.

Click **Validate**. Correct any errors. Click **Submit**.

Termination (TM) document

When a Termination document is created, AdvantageME generates an email to the requestor, which is populated in the **Requestor's Email Address** field on the Purchase Order document, notifying the original Requestor that the Purchase Order has been terminated. Upon acceptance of the termination document, the contract will be finalized automatically, as of the effective termination date. Further orders referencing the contract after the termination date will be rejected.

The acceptance of the Termination document posts a modification to the referenced award document. Master Agreements will be cancelled by a system generated Award cancellation. All open encumbrances for Delivery Orders referencing Master Agreements will be closed if the buyer has selected to close without receipts. This action cancels any open purchase orders and notifies the using department of the termination and cancellation of the order via email.

Termination documents can terminate any type of Award document. The following data is modified on the Contract:

- On the Header section of each Contract document, the **Closed Date** field will be set to equal the current system date.
- If the **Commodity Line Type** = Item, the **Ordered Quantity** will be changed to equal the **Closed Quantity**.
- If the **Commodity Line Type** = Service, the **Ordered CT Amount** will be changed to equal the **Closed CT Amount**.

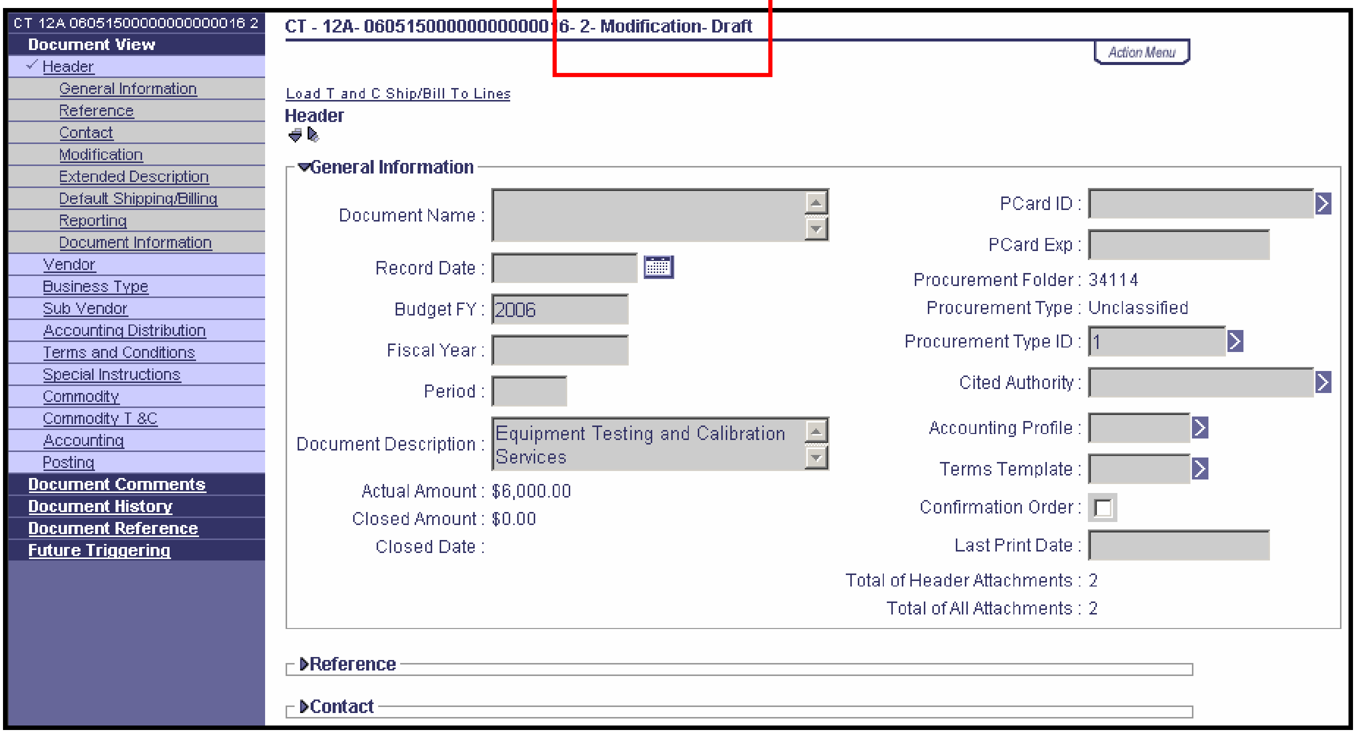
Several things can be attached to this document. They include:

- Bid Deposit
- Bond
- Contract Assignment
- Letter of Credit
- Liquidated Damages
- Warranty
- Vendor Correspondence
- Certificate of Insurance
- Retainage Summary
- Retainage Detail
- Renewal

AdvantageME will terminate a CT in one of two ways:

1. Terminating a CT (NOT Closing without receipt):

The TM document automatically generates a Modification to the original CT document in the Draft phase.



The **Expiration End Date** on the CT is changed to reflect the **Effective Date** on the TM. The System will generate an email (via workflow) to the **Buyer Email Address** field supplied on the TM, notifying the buyer that the CT has been terminated.

2. Terminating a CT (Closing without receipt):

The TM document automatically generates a modification of the original CT document in the Draft phase. The **Expiration End Date** is changed to reflect the **Effective Date** on the TM. The system generates an email to the **Buyer Email Address** field supplied on the TM, notifying the buyer that the CT has been terminated.

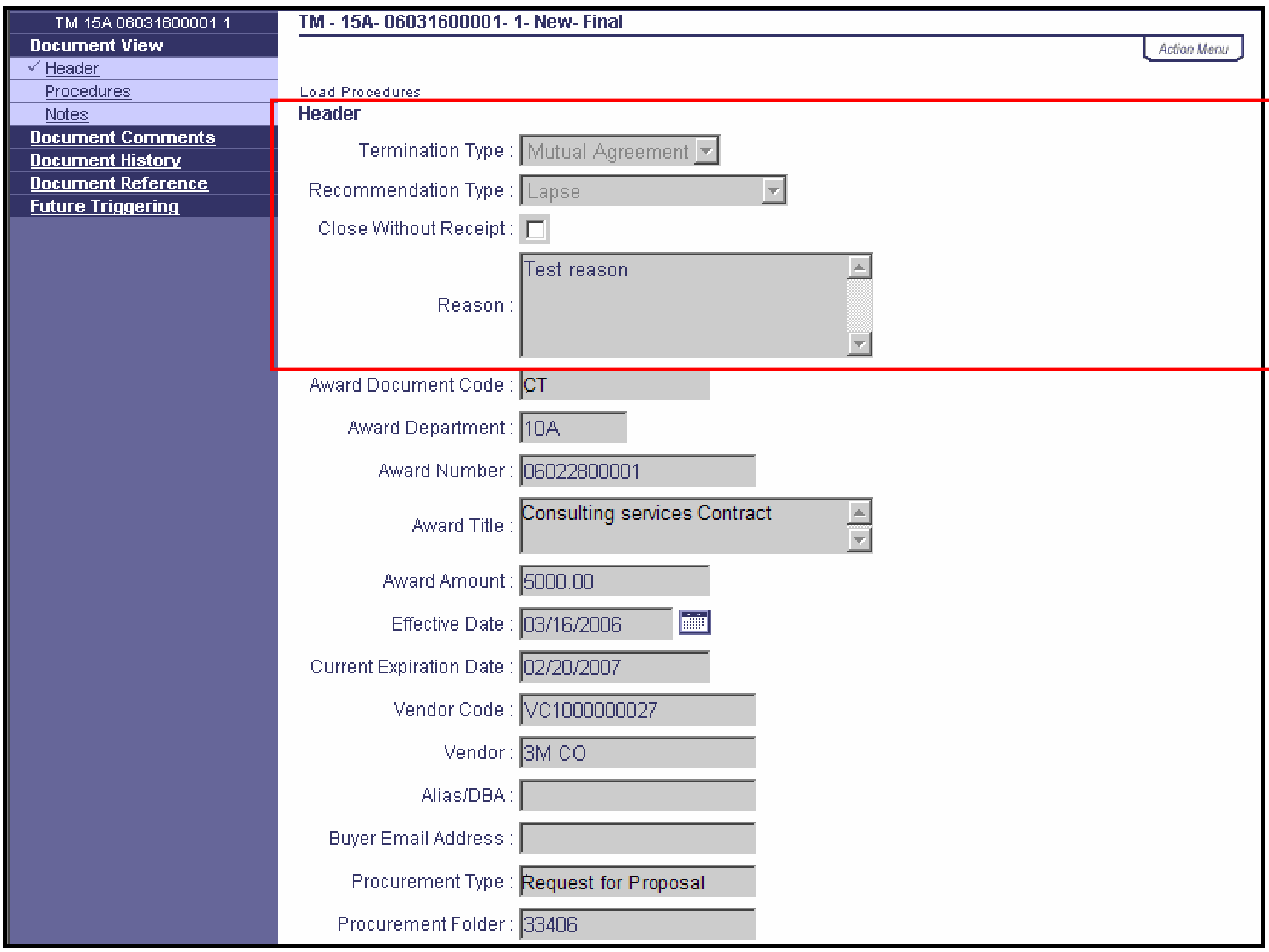
Sections of the TM document

The user completes all sections of the TM document.

Header

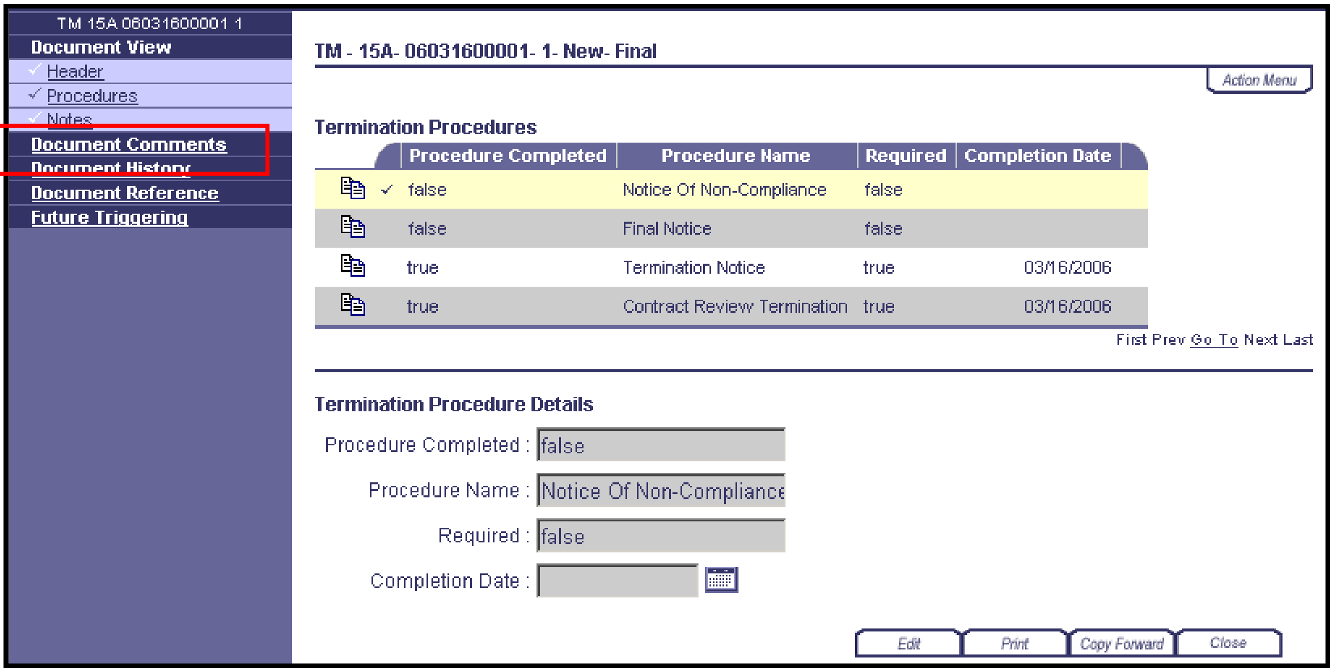
A Termination document can either have a type of Non-compliance or Mutual Agreement. The allowable types are set up on the Termination Type table. The **Recommendation Type** can either be Reprocure, Award to Next Low Bidder, or Lapse. No matter which type is chosen, upon acceptance of the termination document, the contract will be finalized automatically to the effective termination date. Further orders referencing the contract after the termination date will be rejected.

Based upon conditions of the termination, you select whether or not you wish to **Close Without Receipt**. If Yes is selected, then outstanding purchase orders are closed without receipt. If No is selected, then outstanding purchase orders remain open for receipts and payments.

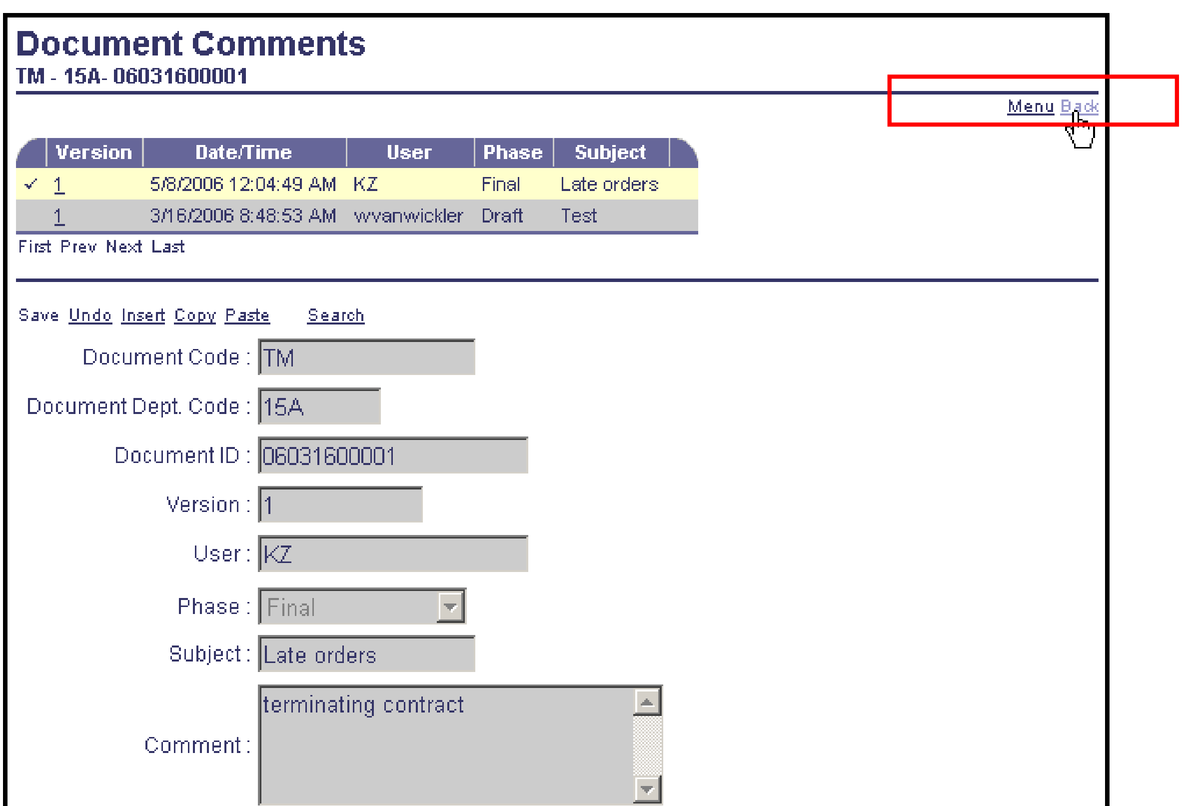


Document Procedures

Complete the Document Comments section to complete all required procedures. The option also exists to populate the Notes section of the TM document rather than completing Document Comments.

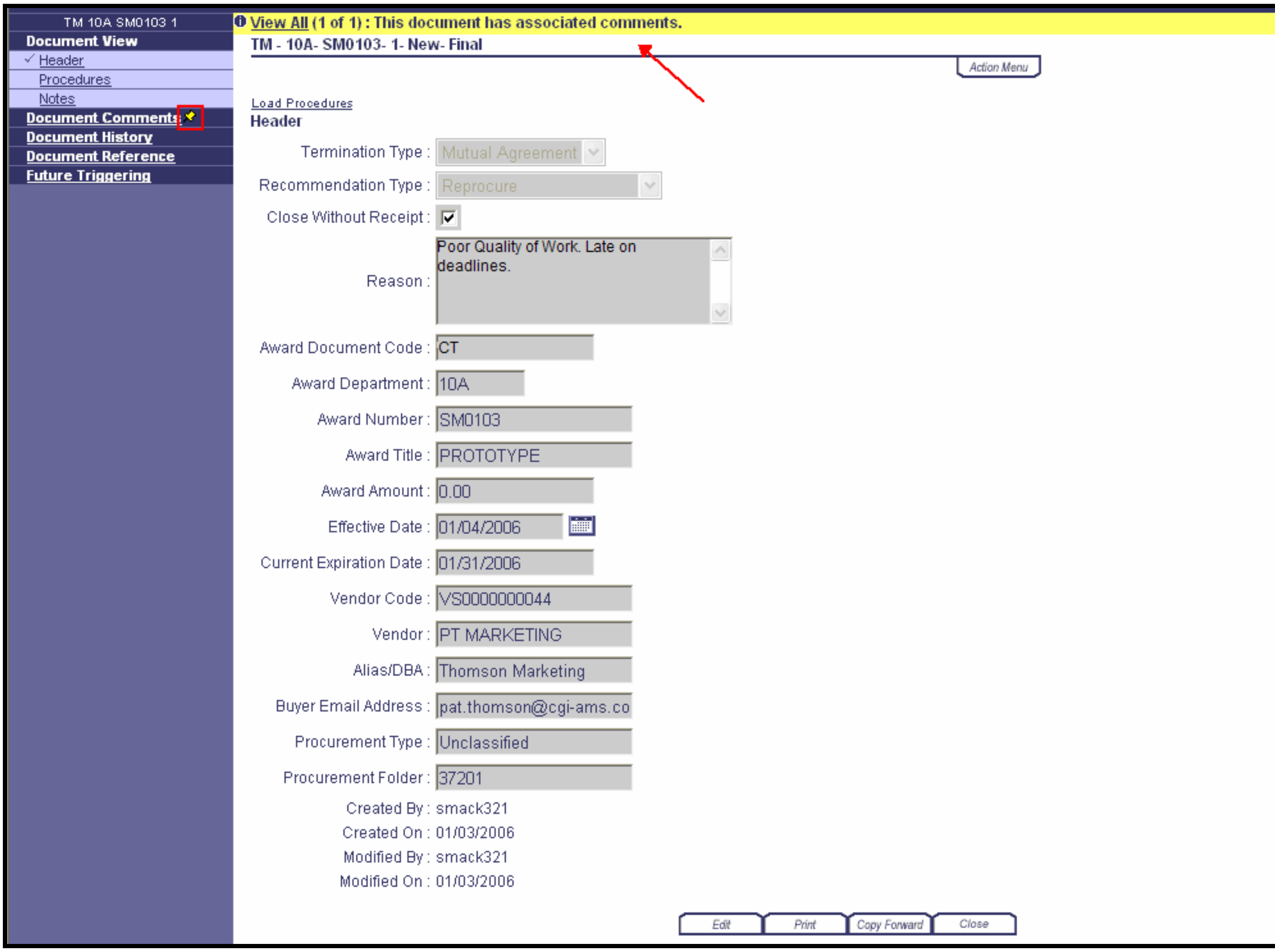


Click Insert to add a comment. Click Back to return to the TM document.



An icon appears once comments are added.

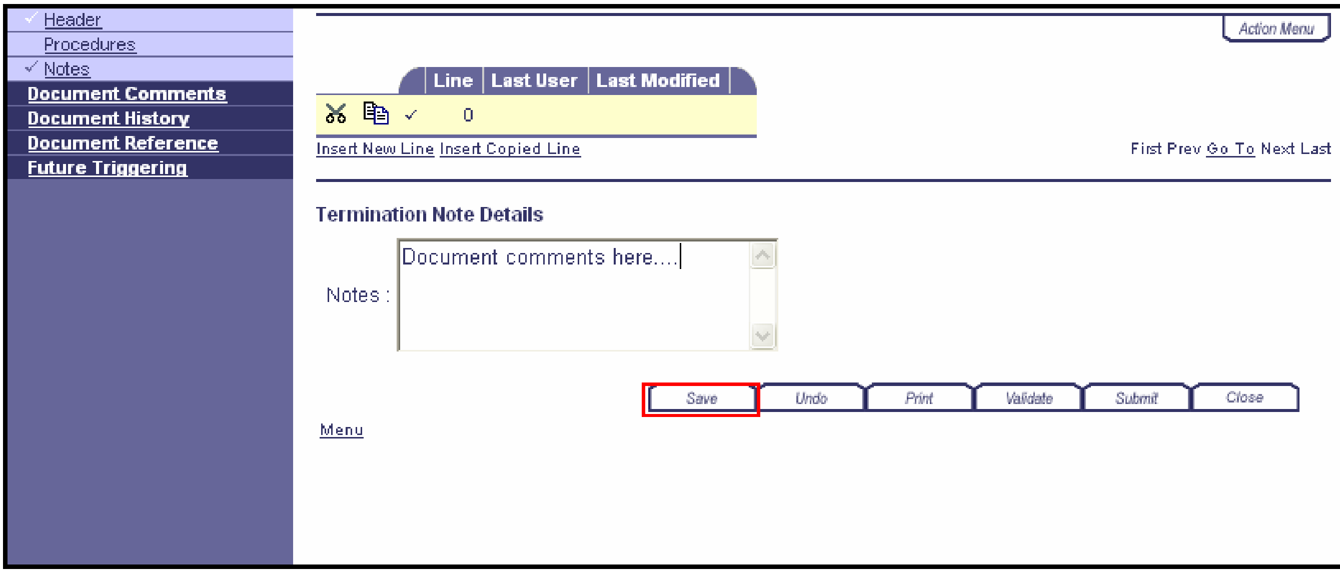
Note: different doc IDs for demonstrating purposes.



Notes

Click Insert New Line to insert as many comments as necessary.

Click **Save** before adding a new line.



Click **Validate**. Correct any errors. Click **Submit**.

Go to Exercise 4 to Create a Termination (TM) document

9—Modifying Procurement Documents

Solicitation documents can be modified once they are finalized and published. However, if the closing date and time have passed, the solicitation cannot be modified directly. In order to modify, an amendment is performed.

Amendments

Once a Solicitation document has been finalized and published, it is considered frozen. If changes are needed after this time, the Solicitation document must be amended. The following steps identify the amendment process of an open published Solicitation document in AdvantageME:

1. Open Solicitation document, click Edit and make changes.
2. An Amendment Number is automatically assigned.
3. The amended solicitation posts to the web after the modification is finalized. Amendment detail may also be posted to the web. This is controlled by a publishing option.
4. All vendors that were originally notified are notified of the amendment along with any vendors that have responded to the Solicitation.

Solicitation

A buyer can make changes to the Solicitation document any time prior to the Solicitation being released; these are not amendments.

Once the Solicitation has been published, changes to the Solicitation are tracked in the form of amendments. A notification of amendments is automatically sent to vendors on the vendor list (as previously described) and vendors that have responded but were not on the list.

The **Prohibit Online Responses** flag can be modified in a Solicitation Amendment if the flag is being changed from true to false, allowing online bids to be submitted. However, the **Prohibit Online Responses** flag may not be modified in a Solicitation Amendment if the flag is being changed from false to true, prohibiting online bids to be submitted. In short, once a Solicitation has been finalized, the Buyer can allow online responses to that Solicitation if they were originally prohibited, but the Buyer cannot prohibit online responses to that Solicitation if they were originally allowed. This is because once the Solicitation has been finalized and the **Let Date** has passed, a vendor may have already responded to that Solicitation.

A buyer cannot change the **Restrict Multiple Responses per Vendor TIN** flag during a modification of a submitted Solicitation document.

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10—Error Messages and Handling

The error messages that are most common on Procurement documents are:

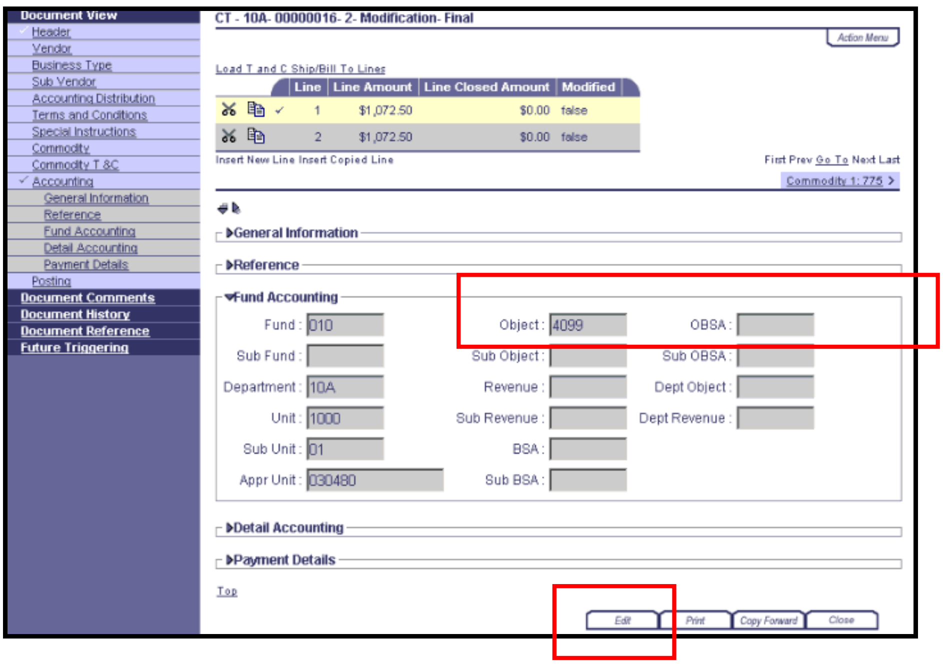
- Missing chart of accounts element
- Publishing date cannot be less than current date

Missing Chart of Accounts Element

This error appears on the CT document but not on the RFP document as it does not contain accounting lines.

To remedy the error, click the Accounting line. Click **Edit** to modify the document. In the Fund Accounting section, enter the correct Object code.

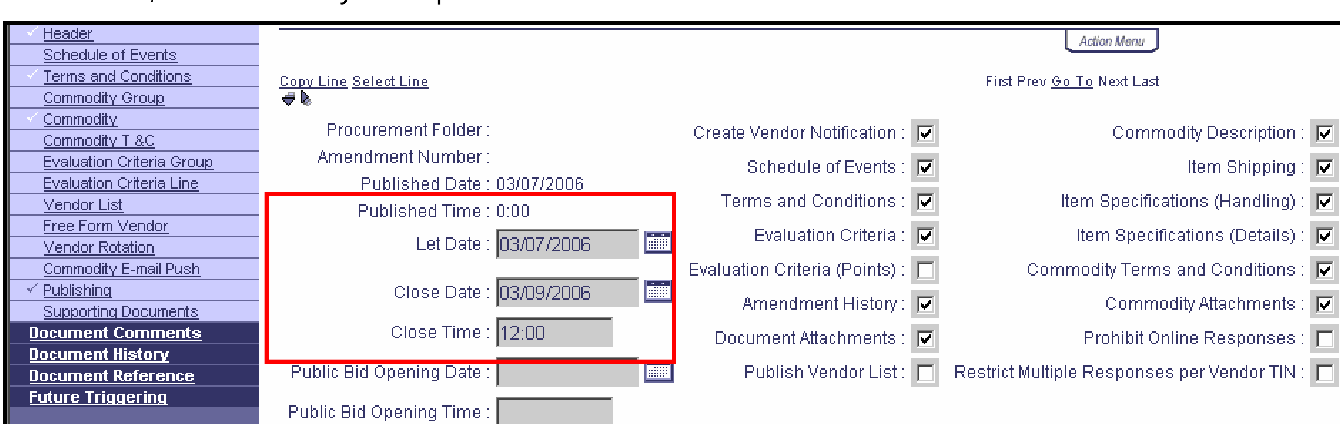
Submit the document.



Publishing Date cannot be less than Current Date

The current date is the date (usually today's date) that you create the document. **Published Date** refers to the date the information was made available on the web ready for the vendors to view.

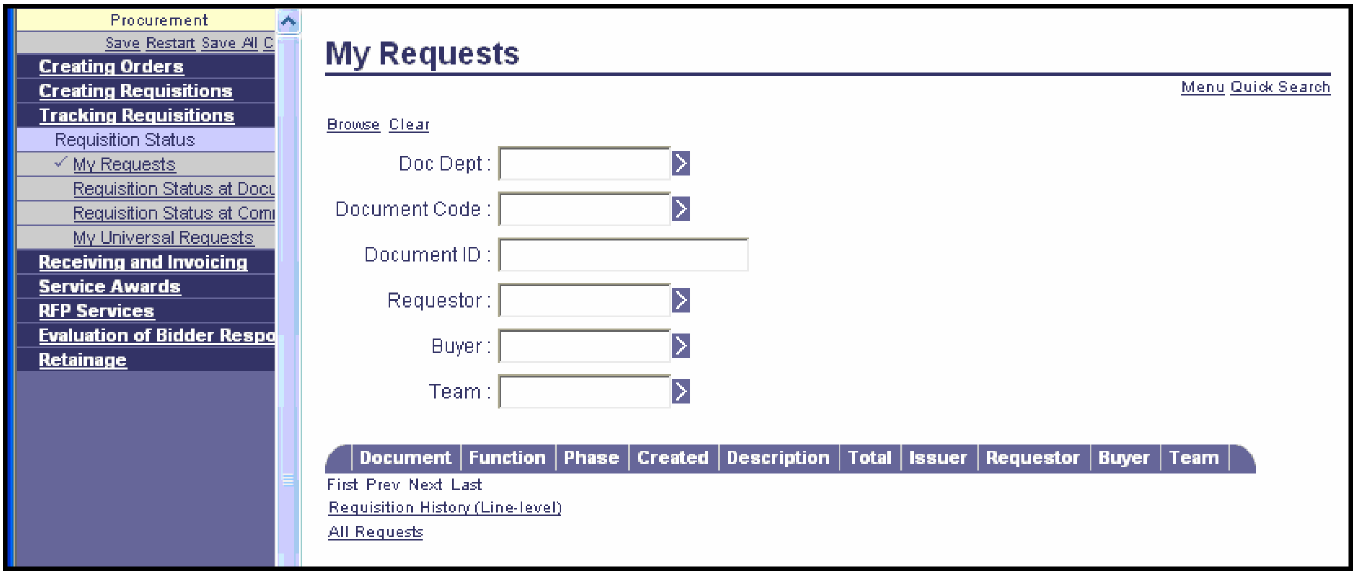
Therefore, you need to first create the document. Once it is complete with all of the appropriate information, it is then ready to be published.



11—Online Inquiries

Order Status

To track RFPs and service contracts, go to the Procurement Workspace and click Tracking Requisitions. Click My Requests.



You can search for different types of documents in this section but you will be most interested in searching for an RFP or a CT document.

Clicking the My Requests link transitions the user to a similar inquiry but it pre-filters to show only Request initiated by the user viewing the inquiry. The My Requests inquiry can also be accessed from Page Search using the page code.

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12—Reporting

InfoAdvantage is used to generate Procurement reports, which are listed below:

- Awards by Vendor
- Awards by Department
- Custodial Contract report
- Service Contracts report
- Open RFP report
- Closed RFP report

An example of a Closed RFP report

REPORT ID: RFP-10A-06030600001
RUN DATE: 03/22/06
RUN TIME: 11:49:34 AM

STATE OF MAINE
DIVISION OF PURCHASES
REPORT ON CLOSED RFP'S

PAGE 1

RFP #: 06030600001
Date and time RFP Closed: 4/15/2006 08:00
Dept Contact: Jill Cogswell 207-624-7335

List of Responses	Vendor City/State		Date/Time Response was Rec'd	
A H GROVER INC	CUMBERLAND CTR	ME	4/15/2006	08:00
AMERICAN SALT CO	PORTLAND	ME	4/15/2006	08:00
International Salt	Augusta	ME	4/15/2006	08:00
MORTON SALT	augusta	ME	4/15/2006	08:00
STATE SALT CO.	AUGUSTA	ME	4/15/2006	08:00
US SALT INC.	SMITHFIELD	ME	4/15/2006	08:00

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13—Session Review

We have generated an RFP document and an Evaluation document. We discussed the different scenarios for creating a BP18R and BP54 contract; BP18R documents do not reference other documents and are only created for services that are equal to or less than $2500. The Termination document was also detailed. For each of these documents, we have discussed the required approval process. Finally, we discussed the inquiry tables used to search for Procurement documents.

Procurement—Contracts Quiz

Review Questions	
A	The BP18R Contract can reference other documents and is created for services valued at greater than $2500. True or False.
B	Solicitation and Solicitation Response documents do not use event types. True or False
C	How will you create an RFP document?
D	What is the page code for the Procurement Folder? What is the purpose of the Procurement Folder?

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14—Exercises

NOTE: These exercises may also be run within the AdvantageME Learning Environment. For access please see the AdvantageME website http://inet.state.me.us/osc/accounting/mfasis%20upgrade/training.htm

Exercise 1 – Create an RFP document.

Exercise 2 – Create an EV document and BP54 Contract.

Exercise 3 – Create a BP18R Contract

Exercise 4 – Create a TM document.

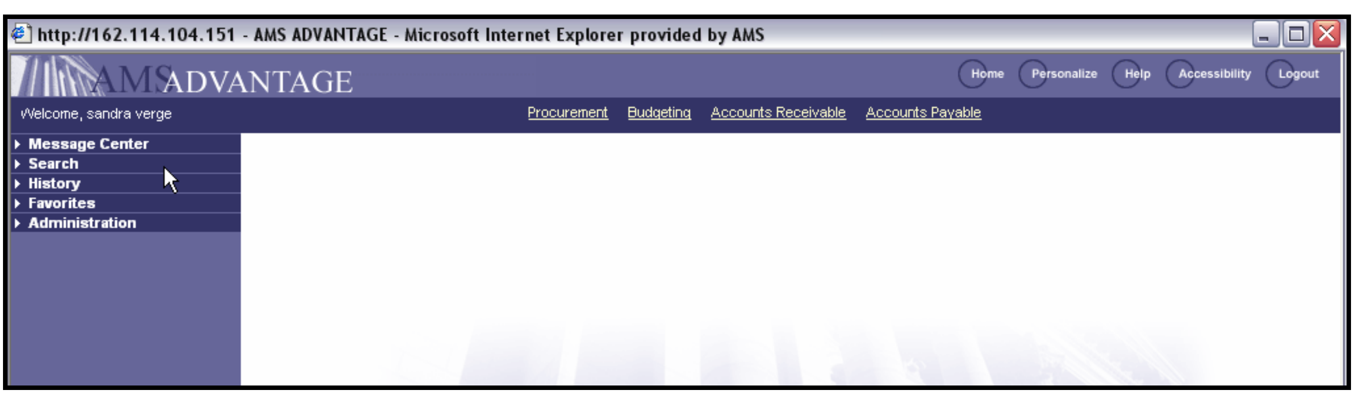
Exercises – Logging In to AdvantageME

You use a Student ID to access the training database during class. These IDs are only set up for the training environment. Your User ID for the production environment is assigned along with a new password when AdvantageME is implemented.

From the Login page, enter the following information:

Required Fields	Values
User Name	Enter your Student ID from your Student Card. **NOTE: User Names are case sensitive.**
Password	Enter your Password and click **Login**. **NOTE: Passwords are case sensitive.**

The Home Page appears.



Exercise 1 — Create an RFP document

Scenario

Your department required consulting services for a new IT application. Create an RFP document to record this solicitation.

Task Overview

Login to AdvantageME using your Student ID and password. Create the RFP document from the Document Catalog. Realize that the RFP document will be workflowed to the department approver, department designee and OIT.

Procedures

1. From the Primary Navigation Panel, click **Procurement** workspace.
2. On the Secondary Navigation Panel, click **RFP Services**.
3. Click **RFP Document**. The Document Catalog page opens.
4. Click Create. Enter the following information:

Required Fields	Values
Dept	18P
Unit	WF01
Auto Numbering	Click the box

5. Click Create. The RFP document page opens to the **Header** section.

---

6. Enter the following information in the **General Information** component:

Required Fields	Values
Document Description	Consulting services for IT application
Procurement Type	8

7. Click **Contact**. Enter the following information:

Required Fields	Values
Requestor ID	Enter your Learner ID

Click **Save**.

Attach detailed RFP document to the header as a word document (.doc) or other file type.

8. To attach a document, click **Action Menu→Attachments**.
9. Click Upload.
10. Click **Browse** to search for the attachment. The attachment is found on your desktop and is labeled "RFP.doc".
11. Attach the file and enter RFP attachment in the **Description** field.
12. Click Upload.
13. Click Return to document to leave the attachment section.
14. Click **Commodity** from the Secondary Navigation Panel.
15. Click Insert New Line.
16. Enter the following information:

Required Fields	Values
CL Description	Consulting Services for an IT application
Commodity	Click the Pick List and enter ***Consulting*** in the **Name** field. Click Browse. Click Next until you find **Computer Software Consulting** (91829).
Line Type	From the Drop down menu, select Service
Service From	Click the Calendar icon and select 09/01/07
Service To	Click the Calendar icon and select 08/31/08
Extended Description	Enter 'See attached RFP for details'

17. Click **Shipping and Billing**
18. Next to the **Shipping Location** field, click the Pick List to select a shipping location
19. Next to the **Billing Location** field, click the Pick List to select a shipping location
20. Click **Save**.
21. Click **Evaluation Criteria Line** from the Secondary Navigation Panel.
22. Click Insert New Line.
23. Enter the following information:

Required Fields	Values
Criteria	Click the Pick List and select Pricing
Points	60

Click Insert New Line.

24. Enter the following information:

Required Fields	**Values**
Criteria	Click the Pick List and select Experience
Points	40

Click **Save**.

25. Click **Publishing** from the Secondary Navigation Panel.

26. Enter the following information:

Required Fields	**Values**
Let Date	Today’s Date
Close Date	8/15/07
Close Time	17:00

27. Click **Validate**.
28. Correct any errors and Validate again. Click **Submit**.
29. Click **Close** to exit the document.

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Exercise 2 — Create an EV and BP54 CT document

Scenario

You need to review the evaluation criteria and award points to vendors. Create an EV document to set up evaluation criteria for an RFP that has recently opened. Create a BP54 contract to solidify the agreement.

Task Overview

Login to AdvantageME using your Student ID and password. Copy forward from the RFP document. Create CT document from the EV header line.

Procedures

1. From the Primary Navigation Panel, click **Procurement** workspace.
2. On the Secondary Navigation Panel, click **RFP Services**.
3. Click **RFP Document**. In ID, type * and the ID number from your student card.
4. Click **Document State**. Select **Final** from the **Phase** drop down menu. Click Browse.
5. Find the RFP document ID number listed on your student card and click the link.
6. Click **Copy Forward.** The Copy Forward page opens.
7. Enter the following information:

Required Fields	Values
Doc Department Code	18P
Unit	WF01
Auto number	Click the box
Target Doc Type	Select the EV document so the line is highlighted. Click **OK**.

8. The EV document page opens to the **Header** line.
9. Click **Load Responses**.
10. Click **Load Statistics** in the Secondary Navigation panel to see how many bids you received.
11. Click **Load Statistics Detail** Secondary Navigation panel to see who has bid.
12. Click **Award By Total** in the Secondary Navigation panel to view pricing. Once there, click the SR link to view the vendor's response. To download the response, click Action Menu and select Attachments. Click download and you can either open or save the document. Click Return to Document. Click Close to exit the SR document.
13. Click **Score by Criteria** in the Secondary Navigation panel to award points to vendors.

14. Click **Load Criteria Line**. Assign points to each criterion in the **Points Awarded** column. You need to award points for each vendor.
15. Click the Vendor shortcut arrow (Vendor: xxx>), which is found above the Action bar. Make sure the next vendor is selected. Award points to each vendor.
16. Click **Rank by Criteria Group** in the Secondary Navigation panel to view which points were awarded to vendors. Note which vendor has the most points.
17. Click **Award by Line** in the Secondary Navigation panel.
18. Choose the awarded vendor; this is the vendor with the most points that you found in Step 16. Select the **Award** flag. **NOTE:** Make sure Award flag is not checked for other vendors.
19. Click **Save**.
20. Click **Evaluator Comments.** Click Insert New Line.
21. In the **Comments** field, enter **See scoring sheet and comments in hard copy delivered to Purchases.**

Do this for all vendors: Choose the next vendor by selecting the Vendor shortcut arrow (Vendor: xxx>); Click Insert New Line; enter in a comment.

22. Click **Header**
23. Click **Document Creation** to open this section.
24. Enter the following information:

Required Fields	Values
Document Code	CT
Doc Unit Code	WF01
	Click Create Document NOTE: The screen appears only to have refreshed, but you have now created a CT document that you will link to in the next step.

25. Click **Awarded Items** in the Secondary Navigation panel. You will see a link to the CT document and click that link. A CT document will open up at the Header section.

NOTE: Make note of the CT number. In the upper right hand section of the first page of each contract form (BP18 or BP54), you must hand write this number on each hard copy before sending to Purchases for approval.

26. Click **Edit**. Most of the information on the CT will be inferred from the RFP document.

NOTE: You do not need to select a Vendor or a Commodity, as it is all inferred from the RFP.

27. Click Commodity from the Secondary Navigation panel.
28. View the **Contract Amount** field. Write down this value _____________; you will need it later.
29. Click Shipping/Billing to expand this section to ensure both Shipping & Billing are populated.
30. In the Shipping field, click the Pick List and select a shipping address. Do the same for Billing.

31. To add the accounting line, click **Accounting** from the Secondary Navigation panel.
32. Click Insert New Line,
33. Enter the following information:

Required Fields	Values
Event Type	Click the Pick List and Select PR07 for under $2,500; PR05 for over.
Line Amount	Enter the value you found on the Commodity line in Step 28

Click **Fund Accounting**. Enter the following information:

Required Fields	Values
Fund	Please refer to your Student ID card
Department	Please refer to your Student ID card
Unit	Please refer to your Student ID card
Sub Unit	Please refer to your Student ID card
Object	Please refer to your Student ID card

34. Click **Validate**. Correct any errors and validate again.
35. Click **Submit**.
36. Click **Close**.

You are now back at the EV document.

37. Click **Validate**, then **Submit**.
38. Click **Close** to exit the EV document.

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Exercise 3 — Create a BP18R Contract (Sole Source)

Scenario

Your department needs snow plowing services. Create a BP18R Contract, as the dollar amount is less than $2,500, to solidify the agreement with the vendor.

Task Overview

Login to AdvantageME using your Student ID and password. Create the CT document from the Document Catalog.

Procedures

1. From the Primary Navigation Panel, click **Procurement** workspace.
2. On the Secondary Navigation Panel, click **Service Awards**.
3. Click **BP18R**.
4. Click Service Award Contract.
5. Click Create
6. The Document Catalog page opens. Enter the following information:

Required Fields	Values
Dept	18P
Unit	WF01
Auto Numbering	Click the box

7. Click Create. The CT document page opens to the **Header** section.
8. Write down the CT document identifier information (ID, dept), which is located at the top left of the document page. You'll need to hand write this number on the upper right hand corner of the hard copy of the contract (BP 18R) before manually sending 4 copies of the contract to the Division of Purchases.
9. The CT document page opens to the **Header** section.
10. Enter the following information:

Required Fields	Values
Document Description	Signed contract with snow plowing company
Procurement Type ID	Click the Pick List and select Sole Source BP18R (Hint: In the **Procurement Type Name** field, enter ***BP18**. Click Browse.)

11. Click **Contact.** Enter your Student ID number in the **Requestor ID** field.
12. Click **Vendor** from the Secondary Navigation panel.
13. Next to the **Vendor Customer** field, click the Pick List to choose “S&S LANSCAPING”. (Hint: in the **Legal Name** field, enter **S&S***. Click Browse.) Select this vendor by clicking Select.
14. Click **Save**. This will bring in all the relevant vendor information.
15. Click **Commodity** from the Secondary Navigation Panel.
16. Click Insert New Line.
17. Enter the following information:

Required Fields	Values
CL Description	Snowplowing Services
Commodity	Click the Pick List and enter ***Snow*** in the **Name** field. Click Browse. Click Next until you find **Snow and Ice Removal Services** (96872).
Line Type	From the Drop down menu, select Service
Contract Amount	2000.00
Service From	Click the Calendar icon and select 11/1/07
Service To	Click the Calendar icon and select 04/30/08
Extended Description	Will only plow if greater than 4 inches

18. Click **Shipping/Billing**.
19. Click the Pick List and select **15A01** in the **Shipping Location** field.
20. Click the Pick List and select **15A02** in the **Billing Location** field.
21. Click **Save**.
22. To add the accounting line, click **Accounting** from the Secondary Navigation panel.
23. Click Insert New Line.
24. Enter the following information:

Required Fields	Values
Event Type	Click the Pick List and Select PR07
Line Amount	2000

25. Click **Fund Accounting**. Enter the following information:

Required Fields	Values
Fund	Please refer to your Student ID card
Department	Please refer to your Student ID card
Unit	Please refer to your Student ID card
Sub Unit	Please refer to your Student ID card
Object	Please refer to your Student ID card

26. Click **Validate**. Correct any errors and validate again.
27. Click **Submit**. If there are no errors in the document, then the document is sent to workflow.
28. Click **Close** to exit the document.
29. Click **Home.**

30. **NOTE**: All service contracts are required to be encumbered. In this exercise, we used PR07 (non encumbering) due to Advantage's rule that will not encumber transactions under $2,500. When Division of Purchases receives this CT as a PR07 non encumbering event, they will convert it to a PR05 encumbering event in order to encumber the contract**.**

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Exercise 4 — Create a TM document

Scenario

Your department has decided to terminate the snow plowing services contract that you created in Exercise 3. Create a TM document.

Task Overview

Login to AdvantageME using your Student ID and password. Create the TM document by copy forwarding from the CT document.

Procedures

1. From the Primary Navigation Panel, click **Procurement** workspace.
2. On the Secondary Navigation Panel, click **Service Awards**.
3. Click **BP18R**.
4. Click Service Award Contract. Locate the contract you created in Exercise 3, step 8 and click the CT document link.
5. Click **Copy Forward.** The Copy Forward page opens. Enter the following information:

Required Fields	Values
Doc Department Code	18P
Unit	WF01
Auto Numbering	Click the box
Target Doc Type	Select the TM document so the line is highlighted. Click **OK**.

6. The TM document page opens to the **Header** line.
7. Enter the following information:

Required Fields	Values
Termination Type	From the drop down menu, select Mutual Agreement
Recommendation Type	From the drop down menu, select Reprocure
Reason	Did not plow with 4 inches of snow; no immediate response.
Effective Date	Click the calendar icon and select today's date

Click **Save.**

8. Click **Procedures** from the Secondary Navigation panel.
9. If any line has "True" in the **Required** column, then you are required to populate the **Completion Date** field. For those lines, select the line by highlighting it.
10. Click the calendar icon and select the date from two weeks ago.
11. Click **Validate**. Correct any errors and validate again.
12. Click **Submit**.
13. Click **Close** to exit out of the document.

Procurement Answers

Review Questions	
A	The BP18R Contract can reference other documents and is created for services valued at greater than $2500. True or False. **Answer: False. The BP54 contracts can reference other documents and is created for services valued at greater than $2500.**
B	Solicitation and Solicitation Response documents do not use event types. True or False **Answer: True. These documents do not have impacts on accounting, and therefore, do not use event types.**
C	How will you create an RFP document? **Answer: Create the RFP document by clicking the RFP document link from the Procurement workspace. The Document Catalog page opens.**
D	What is the page code for the Procurement Folder? What is the purpose of the Procurement Folder? **Answer: PRCUID. The purpose is to compile all procurement documents related to one procurement number into one location within AdvantageME.**

15—Appendix A—Workflow Units

NATURAL RESOURCE AGENCIES WORK FLOW UNITS				
NOVEMBER 2006				
Agency	WF Unit		Approval Role	Name
01A	WF01	AP	01AWF01AP	Animal Health & Ind
01A	WF02	AP	01AWF02AP	Quality Assurance & Regulation
01A	WF03	AP	01AWF03AP	Marketing & Production Dev
01A	WF04	AP	01AWF04AP	Plant Industry
01A	WF05	AP	01AWF05AP	Commissioner's Office
04A	WF01	AP	04AWF01AP	Conservation - Me Forest Serv
04A	WF02	AP	04AWF02AP	Conservation - Parks & Lands
04A	WF03	AP	04AWF03AP	Conservation-Geology & Nat Areas
04A	WF04	AP	04AWF04AP	Land Use Regulation Commission
06A	WF01	AP	06AWF01AP	DEP - Office of the Commissioner
06A	WF02	AP	06AWF02AP	DEP Computer Services
06A	WF03	AP	06AWF03AP	Bureau of Land & Water
06A	WF04	AP	06AWF04AP	Bureau of Air Quality
06A	WF05	AP	06AWF05AP	Remediation & Waste Mgmt
06A	WF06	AP	06AWF06AP	Eastern Maine Regional Office
06A	WF07	AP	06AWF07AP	Southern Me Regional Office
06A	WF08	AP	06AWF08AP	Northern Me Regional Office
06A			06AOtherAP	06A Other AP
09A	WF01	AP	09AWF01AP	IF & W Commissioner's Office
09A	WF02	AP	09AWF02AP	IF & W Licensing Services
09A	WF03	AP	09AWF03AP	IF & W Warden Services
09A	WF04	AP	09AWF04AP	IF & W Resource Management
09A	WF05	AP	09AWF05AP	IF & W Information & Education
13A	WF01	AP	13AWF01AP	Dept. of Marine Resources
13A	WF02	AP	13AWF02AP	Admin & Computer Services
13A	WF03	AP	13AWF03AP	Marine Patrol
13A	WF04	AP	13AWF04AP	Resource Mgmt
94V	WF01	AP	94VWF01AP	Atlantic Salmon Commission

16—Appendix B—Workflow Matrix

ADVANTAGE Procurement Workflow Matrix

DOCUMENT TYPE	DEPARTMENT		DIVISION OF PURCHASES			
	Agency Manager	Commissioner Designee	Buyer Printing	Buyer by NIGP	Contract Admin	Director Purchases
PO (Agency PO) < =$2,500						
DO (Contract Release Order) < = $2,500	A					
DO > $2,500	A	B		C		
DO IT Related (> $10,000) (Commodity Codes 20400-20995)	A	B		C		
DO Warehouse (**Automated 3rd level approval**)	A	B (If > $2,500)				
RQS < = $2,500	A					
RQS > $2,500	A	B				
Printing RQS (All $ amounts) (Commodity Codes 90660 - 90699)	A	B (If > $2,500)	C			
RQS IT Related (> $10,000) (Commodity Codes 20400-20995)	A	B		C		
RFP	A				B	
RFP IT Related (Commodity Codes 20400-20995)	A				B	
BP18 Contracts (< $2,500)	A				B	
BP54 Contracts (> $2,500)	A	B			C	
BP54 Contracts (> $250,000)	A	B			C	D
BP54 IT Related Contracts (Commodity Codes 20400-20995)	A	B			C	
Contracts (> $ 1,000,000)	A	B			C	D

NIGP: National Institute of Governmental Purchasing	A: First level approval
DO: Delivery Order	B: Second level approval
PO: Agency Purchase Order	C: Third level approval
RQS: Purchase requisition	D: Fourth level approval
RFP: Request for Proposals	