RFP Attachment D
OregonBuys Vendor How-to Guides

MDM (Misinformation, Disinformation, and Mal-information) Analysis Platform Services

Disclaimer:

This guide is being provided to Proposers as a curtesy for reference-purposes only. Agency is not responsible for any inaccuracies or interpretation issues related to this attachment.

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Registering in OregonBuys

1. To start Click on the Blue Register Button located at the top right of the screen.

This will bring up a screen asking for:

Tax ID

Company Name

Email Address

2. Click the Green Register button located In the middle of the screen.

3. This will take you to a new screen with multiple tabs.
   - **A. Company Information:**
     This tab is where you enter the basic information about your company (Vendor Name, Address, Tax ID, etc.)
   - ***B. Administrator:***
     This tab is where you enter information about the Administrator (owner) of the account, it is also where you will create your Login ID and Password for the account.
   - ***C. Address:***
     This tab is where you enter your company address, a secondary address can be added, if needed.
   - ***D. Terms:***
     This tab is where you enter your company's Payment terms, Freight Terms and Shipping terms.
   - **E. Categories & Certifications:**
     This tab is where you accept the Terms of Use. (Note: all of the Categories in bold on this tab are not able to be selected. They are for internal use only.).
   - ***F. Commodity/Service Codes:***
     This tab is where you select the NIGP codes that fit the services that your company provides. If you are not sure what Commodity code to choose you can use a keyword to search for codes (example: if your company sells spark plugs, you can type in Spark plugs into the NIGP Keyword Box and click the "search" button. Codes that match that product will come up, you can then select the code that best fits your service/Product and click "save and continue" or you can "save and add more").
   - ***G. Summary:***
     This tab is a summary of all the above information that you have entered into your profile. After you have reviewed the information for accuracy, click the "Complete Registration Button" located at the bottom of the screen. After a few moments you will be redirected confirmation screen thanking you for registering in OregonBuys.

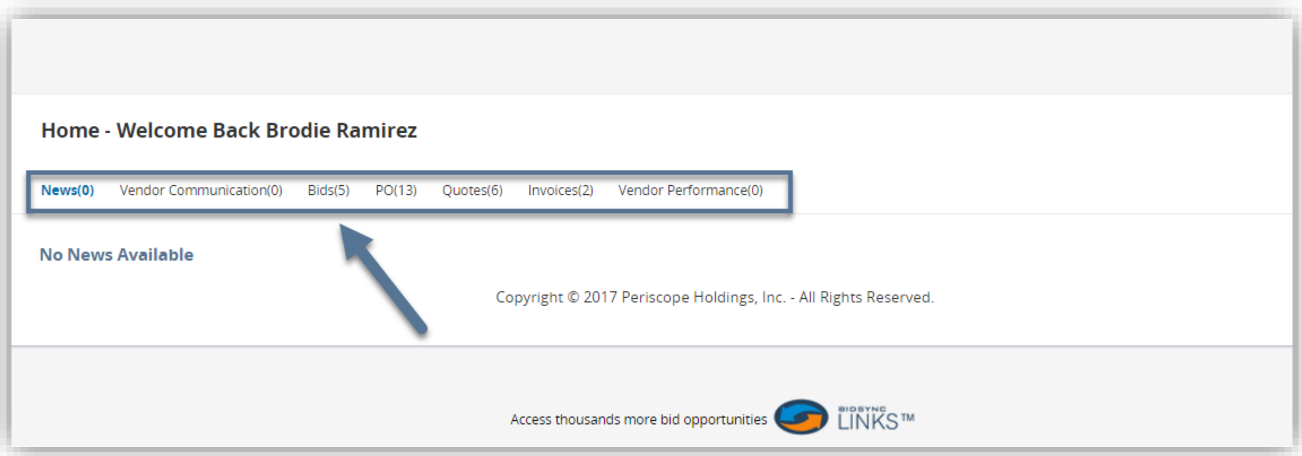
You have successfully registered in OregonBuys!!!!!

Viewing the RFP and Submitting Questions

Homepage

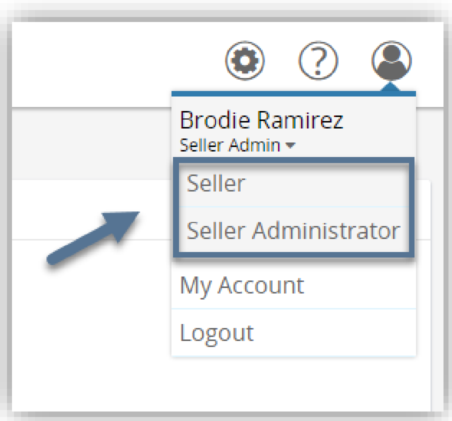
The purpose of the Homepage is to present documents the Seller may take action on (e.g., Open Solicitations and Purchase Orders) or that the Seller has created in the past (e.g., Quotes and Invoices). The Homepage also presents the latest news items or updates regarding the system.

If the user's Homepage does not look like the one above, the user should navigate to the Seller role.



To change roles, follow the steps shown below.

> **Step 1**: Click the Account Icon in the upper right of the Homepage
>
> **Step 2**: Click the down arrow under the Username
>
> **Step 3**: Select Seller

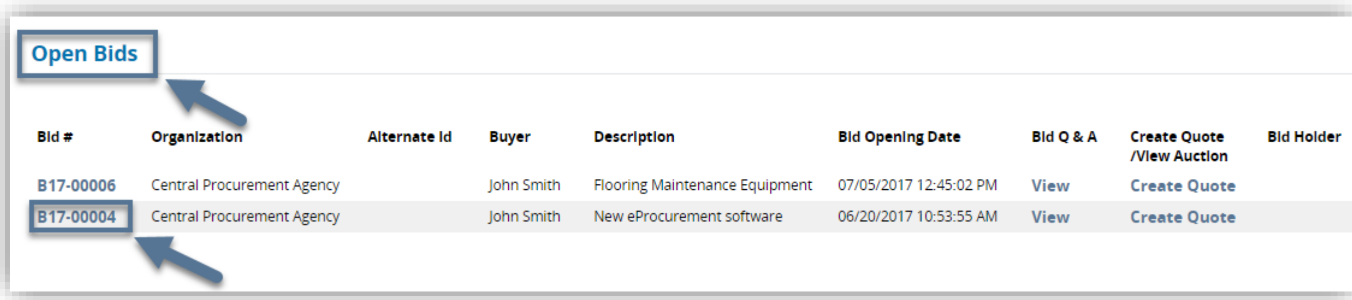


Step 1: Select the Bids tab

Step 2: Scroll to the Open Bids section to locate the Bid

All solicitations that are available for Seller responses are shown in the Open Bids section until the Bid Opening Date and Time. After the Bid Opening Date and Time has passed, the Bids are displayed in the Closed Bids section.

Step 3: Click the Bid # to view the Solicitation

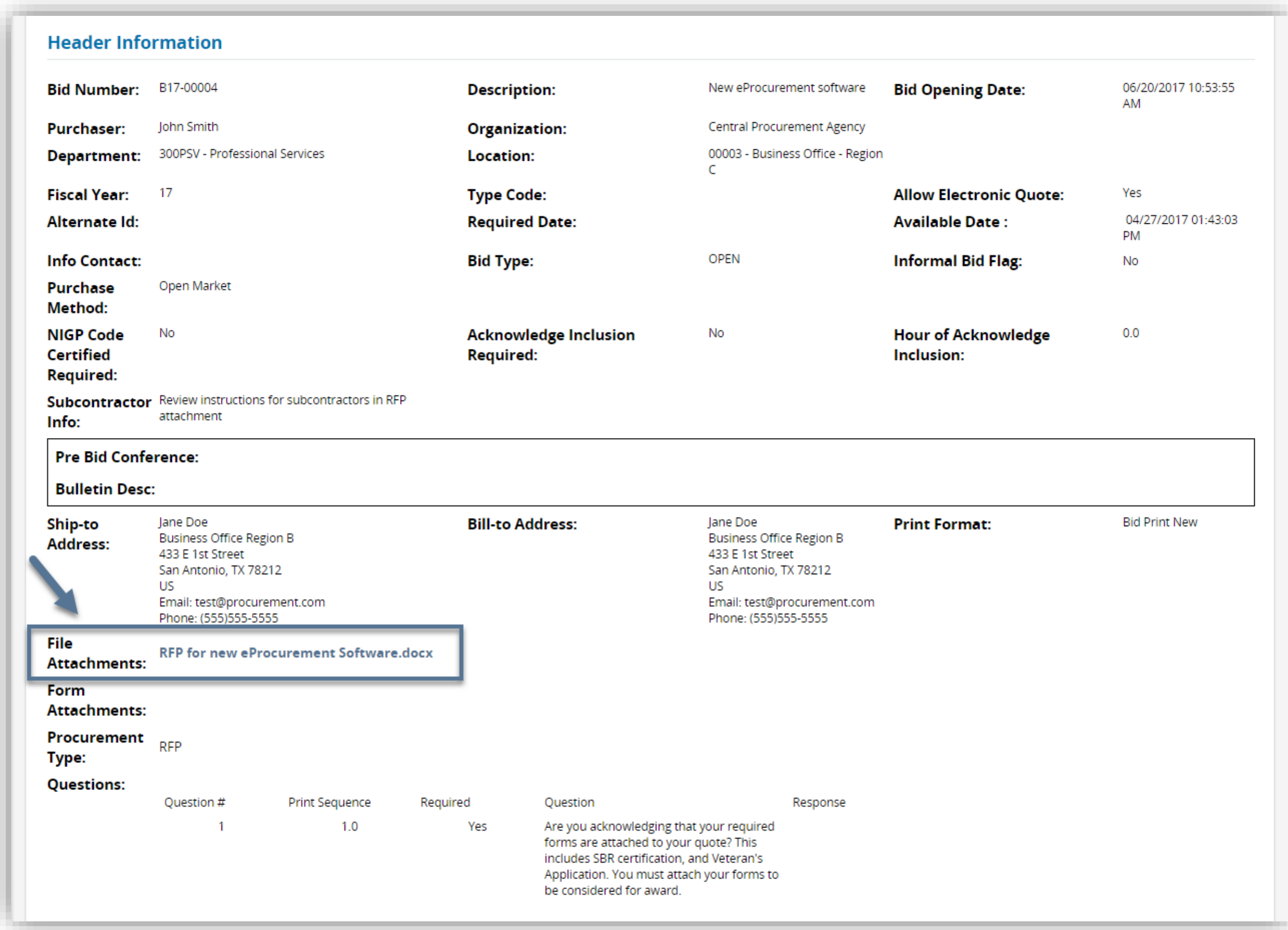


Step 4: Acknowledge the Bid

Click Yes to receive future notifications regarding the Bid (e.g., Bid Amendments). Click No to view the Bid without receiving future notifications.

Bid/Solicitation

The Seller can view the Bid and download attachments after acknowledging the Bid. The Bid is divided into two sections: Header Information and Item Information.



Header Information

Bid Number:	B17-00004	**Description:**	New eProcurement software	**Bid Opening Date:**	06/20/2017 10:53:55 AM
Purchaser:	John Smith	**Organization:**	Central Procurement Agency		
Department:	300PSV - Professional Services	**Location:**	00003 - Business Office - Region C		
Fiscal Year:	17	**Type Code:**		**Allow Electronic Quote:**	Yes
Alternate Id:		**Required Date:**		**Available Date :**	04/27/2017 01:43:03 PM
Info Contact:		**Bid Type:**	OPEN	**Informal Bid Flag:**	No
Purchase Method:	Open Market				
NIGP Code Certified Required:	No	**Acknowledge Inclusion Required:**	No	**Hour of Acknowledge Inclusion:**	0.0
Subcontractor Info:	Review instructions for subcontractors in RFP attachment				

Pre Bid Conference:

Bulletin Desc:

Ship-to Address:	Jane Doe Business Office Region B 433 E 1st Street San Antonio, TX 78212 US Email: test@procurement.com Phone: (555)555-5555	**Bill-to Address:**	Jane Doe Business Office Region B 433 E 1st Street San Antonio, TX 78212 US Email: test@procurement.com Phone: (555)555-5555	**Print Format:**	Bid Print New
File Attachments:	RFP for new eProcurement Software.docx				
Form Attachments:					
Procurement Type:	RFP				

Questions:

Question #	Print Sequence	Required	Question	Response
1	1.0	Yes	Are you acknowledging that your required forms are attached to your quote? This includes SBR certification, and Veteran's Application. You must attach your forms to be considered for award.	

The purpose of the Header information is to document general information regarding the Bid, including any Attachments. Here, the Seller finds important information regarding the solicitation, such as the Bid Opening Date and Pre-Bid Conference information (if applicable to the solicitation). The Seller can also download any Attachments, which often include the terms and conditions and any additional requirements of the solicitation. To download Attachments, click the file name.

The purpose of the Item information is to document the goods or services that the Agency is soliciting. **For purposes of this RFP for OCVR Modernization, pricing on the items tab has been disabled and is not required to be completed**.

Bid Q&A

The purpose of the Bid Q&A is to allow the Seller to ask questions regarding the Bid and to allow the Agency to respond

Submit Questions

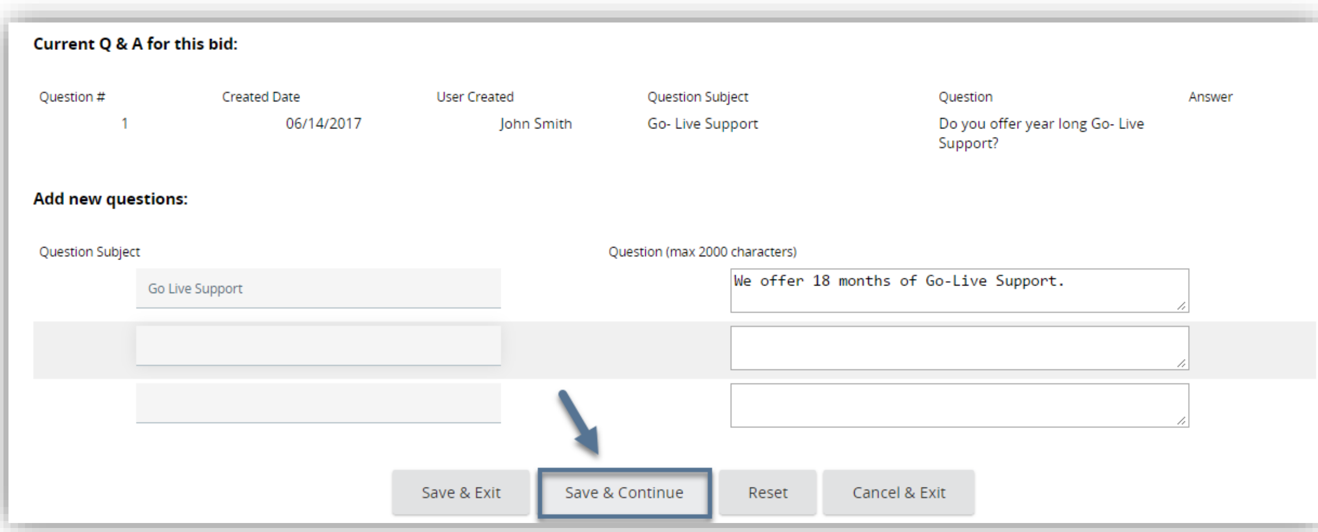
Step 1: Click Bid Q&A

The Bid Q&A is found at the bottom of the Bid. If Bid Q&A is not enabled for the solicitation, the Seller will receive a message that "There are no questions and answers for this bid".

Step 2: Complete up to three Questions

Step 3: Click Save & Continue

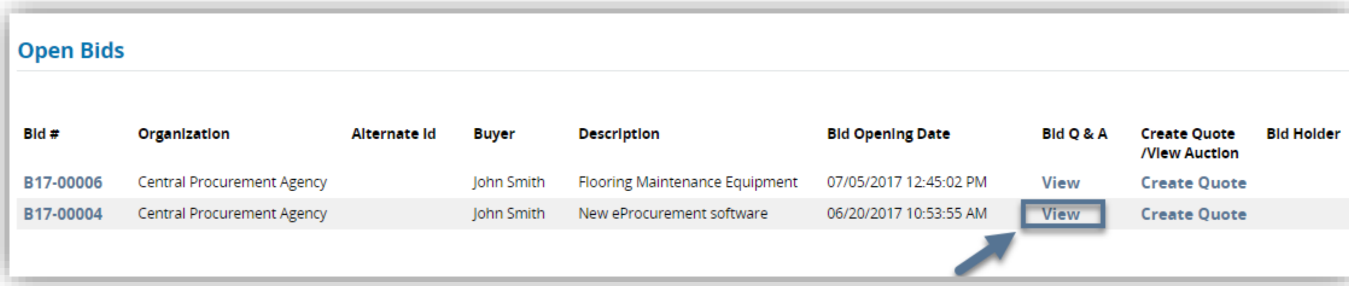
After saving, the Seller can enter additional questions. If the Seller has no additional questions, then click Save & Exit. The Seller can click Reset to erase the entered information or click Cancel & Exit to return to the Bid.



View Reponses

If the Agency posts answers online during the Bidding period, the Seller may view the answers online. In other cases, all questions are answered by the Agency and posted as a new Attachment to the Bid through the Bid Amendment process.

Step 1: Click View under Bid Q&A


Open Bids

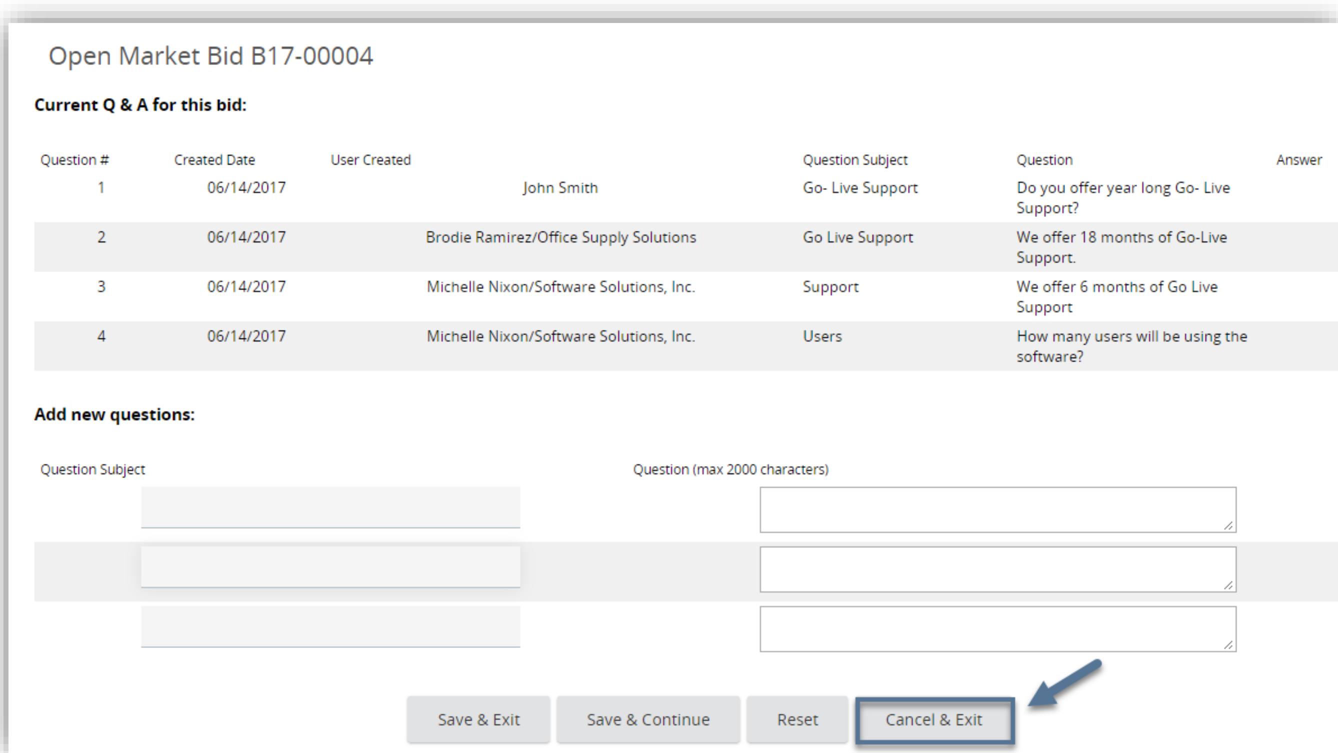
Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Q & A	Create Quote /View Auction	Bid Holder
B17-00006	Central Procurement Agency		John Smith	Flooring Maintenance Equipment	07/05/2017 12:45:02 PM	View	Create Quote	
B17-00004	Central Procurement Agency		John Smith	New eProcurement software	06/20/2017 10:53:55 AM	View	Create Quote	

Step 2: View Responses

The Seller can view the responses from the Agency as well as other questions posed by other Sellers if the questions are configured to show to all Sellers.

Step 3: Click Cancel & Exit

The user can submit more questions on this screen and click Save & Exit to save the questions or click Save & Continue. The user can click Reset to erase the questions entered that you no longer wish to save.


Open Market Bid B17-00004

Current Q & A for this bid:

Question #	Created Date	User Created	Question Subject	Question	Answer
1	06/14/2017	John Smith	Go- Live Support	Do you offer year long Go- Live Support?	
2	06/14/2017	Brodie Ramirez/Office Supply Solutions	Go Live Support	We offer 18 months of Go-Live Support.	
3	06/14/2017	Michelle Nixon/Software Solutions, Inc.	Support	We offer 6 months of Go Live Support	
4	06/14/2017	Michelle Nixon/Software Solutions, Inc.	Users	How many users will be using the software?	

Add new questions:

Question Subject

Question (max 2000 characters)

Save & Exit | Save & Continue | Reset | Cancel & Exit

Responding to the RFP

General Tab

The purpose of the General tab is to capture header level data for the Quote template. Each Quote template is blank when created from scratch. The Seller completes the information to generate a specific Quote number, which is a unique identifier that can be used to locate the Quote in OregonBuys.

Step 1: Complete Required Fields

The Seller must complete all required fields, marked with an asterisk (*), before saving the new response.

Field Name	Field Description	Field Implication	Recommended Usage
Description	Defaults from description of Bid; Seller may edit	N/A	Description of Seller's solicitation response

Step 2: Click Save & Continue

Once the Seller saves the Quote, protected fields are auto filled by the system, and the Quote is now searchable in the system, including from the Seller's Homepage.

The following fields are protected, meaning that the Seller cannot update the fields.

Field Name	Field Description	Field Implication	Recommended Usage
Quote #	Automatically generated upon the first Save	Searchable in internal searches	Automatically numbers the Quote in sequential order
Bid #	Identifies the specific Bid to which Seller is responding	Links Quote to specific Bid	Allows Seller to click document link and view Bid
Organization	Entity requesting Seller's response	Informational	N/A
Status	Initial status is set to In Progress & will update after the Quote is submitted	Identifies where the document is in the process & if the document is editable	N/A
Date Last Updated	Automatically generated upon first Save	Informational	Audit Trail
User Last Updated	Automatically generated upon first Save	Informational	Audit Trail

After the Seller saves the Quote, validation messages will appear at the top of the Quote. These errors will not prevent the Seller from continuing to complete the Quote. The messages alert the Seller to fields or tasks that should or must be performed before submitting the Quote.

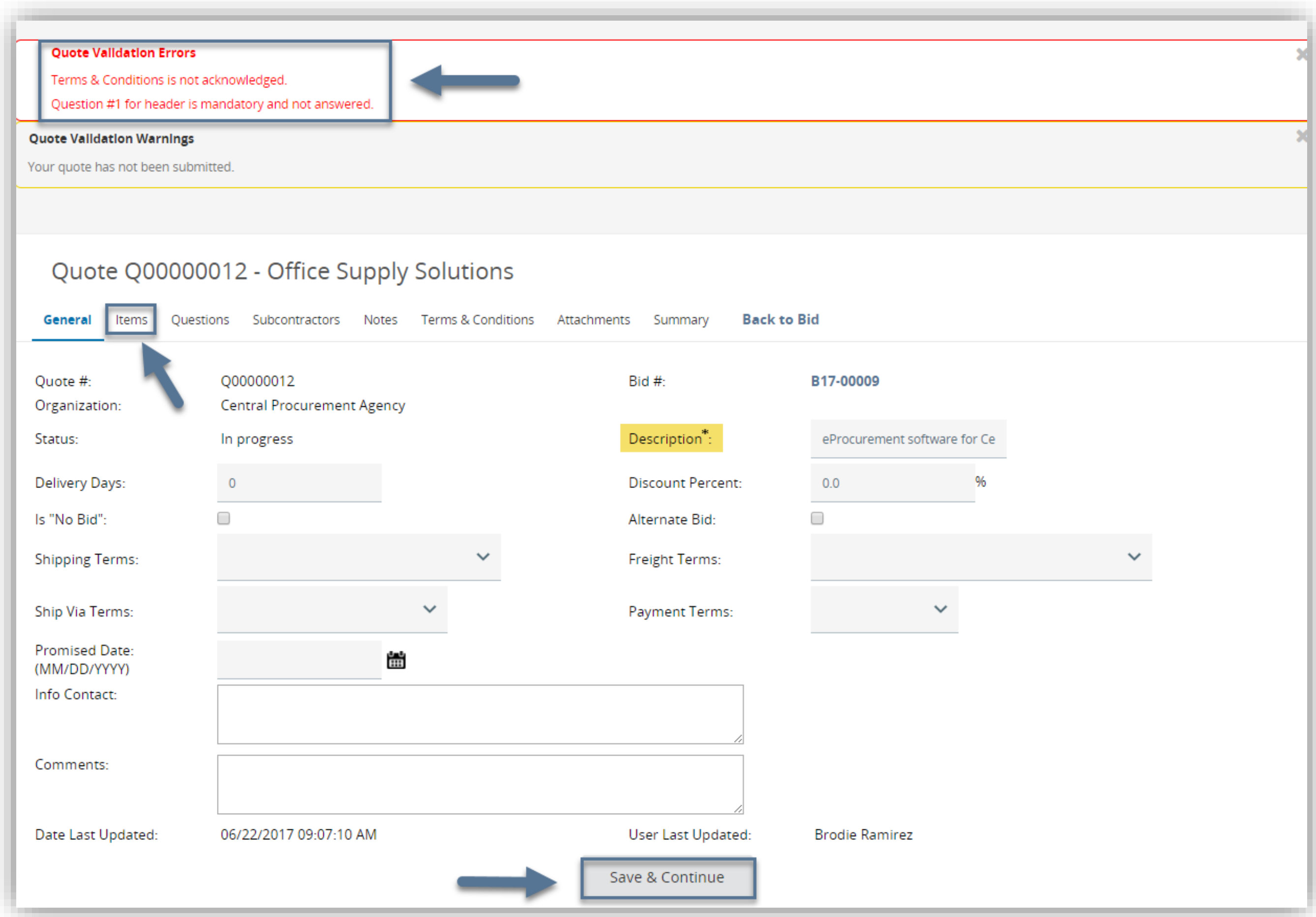
Red validation errors must be addressed before the Seller can submit the Quote. Yellow validation warnings are cautionary and do not prevent the Seller from submitting the Quote.

Step 3: Complete Optional Fields as preferred

Field Name	Field Description	Field Implication	Recommended Usage
Delivery Days	Days to deliver items or services	Informational	May be used to track performance
Discount Percent	Discount percent for all Items	All Items will have same Discount Percent	May be used for catalog discounts
Is "No Bid"	Checkmark to respond to Bid without bidding on any items	All Items will be marked as "No Bid"; Seller cannot be awarded No Bid Items	Some Sellers may select "No Bid" to acknowledge the choice to not bid on the solicitation
Shipping Terms	Configurable dropdown	May be used by Purchaser or overridden	To allow Sellers to identify their preferred Shipping Terms
Freight Terms	Configurable dropdown	May be used by Purchaser or overridden	To allow Sellers to identify their preferred Freight Terms
Ship Via Terms	Configurable dropdown	May be used by Purchaser or overridden	To allow Sellers to identify their preferred Ship Via Terms
Payment Terms	Configurable dropdown	May be used by Purchaser or overridden; payment terms are used to calculate discounts	To allow Sellers to identify their preferred Payment Terms
Promised Date	Date to deliver Items to Agency	Informational	May be used to track performance
Info Contact	Contact information for questions regarding Quote	Informational	N/A
Comments	Field to enter in notes to Agency	Information only	N/A

Step 4: Click Save & Continue

Step 5: Click Items tab



Items Tab

Pricing has been disabled on the Items tab by the Agency for this solicitation. Proposers are to complete and attach the Cost Proposal.

Questions Tab

The Questions tab will not be used for this RFP.

Notes Tab

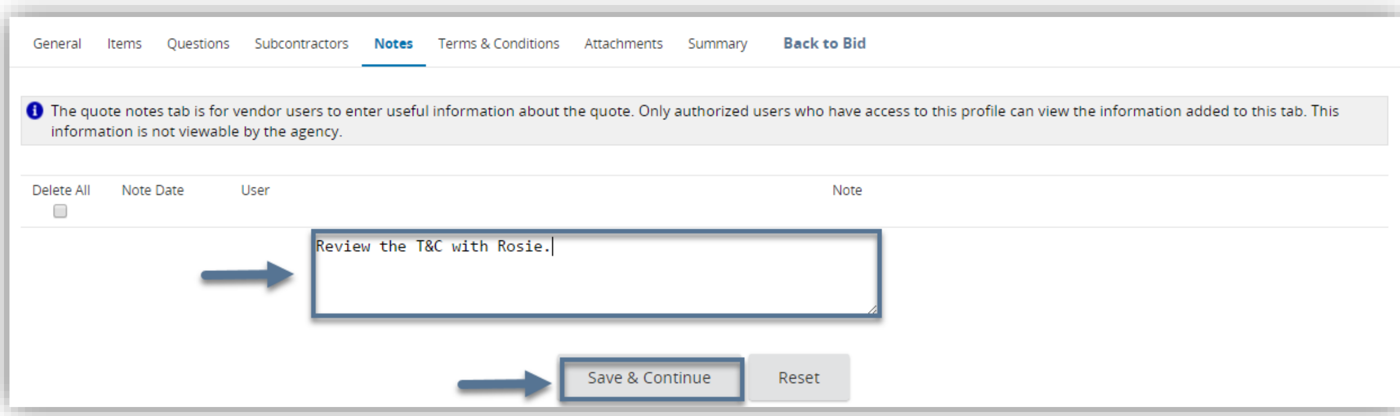
The purpose of the Notes tab is to capture internal notes applicable to all Items listed on the Bid. Agency users cannot see the Seller's notes. The Seller may also capture notes regarding each Item on the Items Tab/Notes subtab.

<u>Add a Note</u>

Step 1: Enter note information in the box

Step 2: Click Save & Continue

The Seller can click Reset to erase all information entered in the Note field box, prior to clicking Save & Continue. Any note may be deleted after being saved.



Delete a note

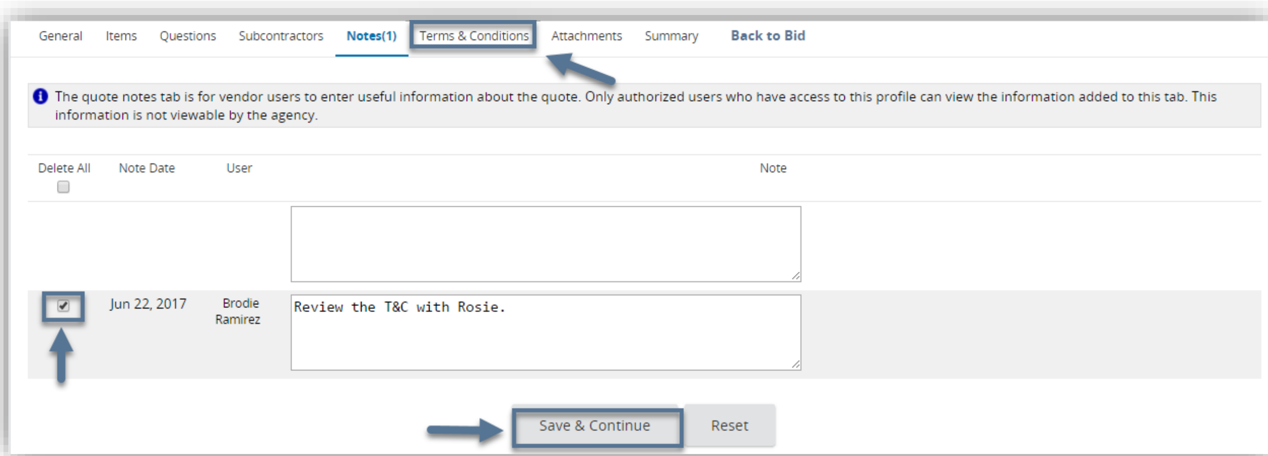
Step 1: Select the note from the Delete column

The Seller can also select Delete All to delete all notes on the Notes tab.

Step 2: Click Save & Continue

The Seller can select Reset to undo the delete action.

Step 3: Click Terms & Conditions tab



Terms & Conditions Tab

The purpose of the Terms & Conditions tab is to allow Sellers to respond to the terms and conditions associated with the Bid. The Terms & Conditions and all other Bid Attachments are shown on the tab (and in the Bid Attachments). In some cases, the Terms & Conditions will be embedded in one of the Attachments and not be shown as a "stand alone" document. Any attachment shown on the tab may be downloaded by the Seller.

The Seller has the option to accept or to not accept the Terms & Conditions of the Bid. Until the Seller takes action on this tab, a red validation error will appear at the top of the Quote.

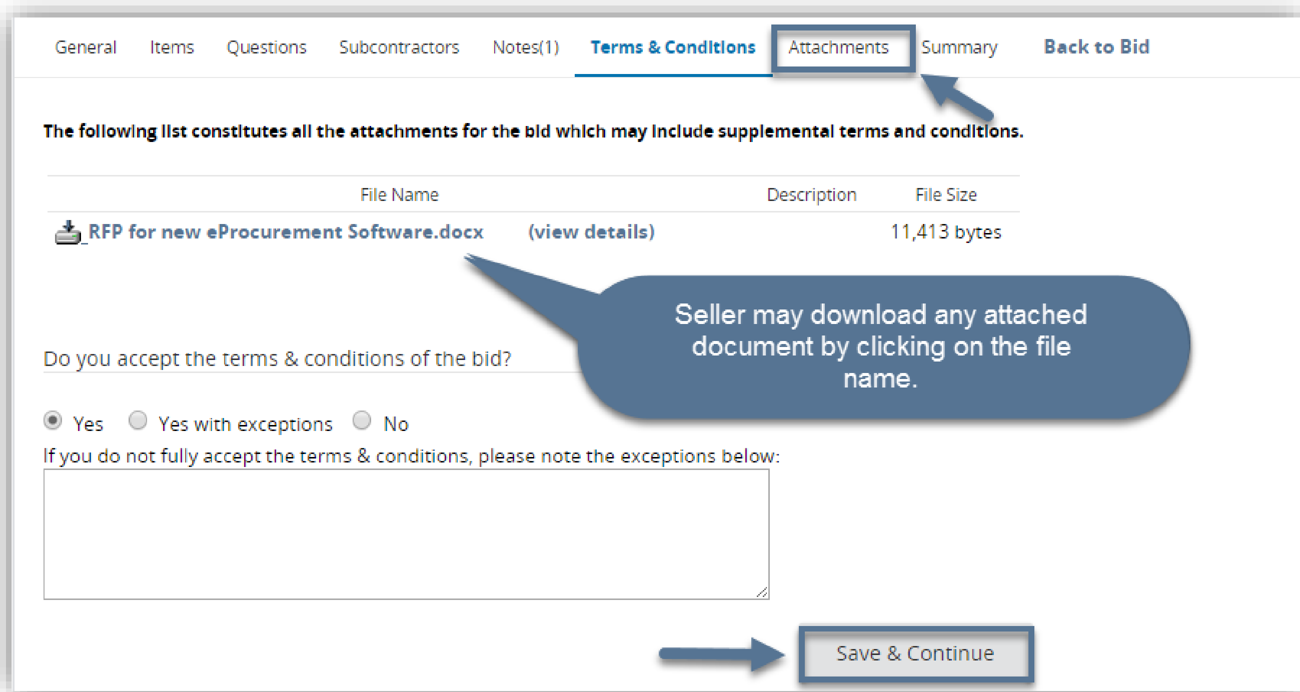
__NOTE__: Regardless of how the Proposer responds in OregonBuys, Agency will use the response to RFP Attachment F (Sample Contract) as the Proposer's official acceptance and/or exceptions.

Step 1: Answer Terms & Conditions

The Seller has the option to select Yes, Yes with exceptions, or No. If the Seller selects Yes with exceptions or No, then the Seller is prompted to enter exceptions in the text box.

Step 2: Click Save & Continue

Step 3: Click Attachments tab



Attachments Tab

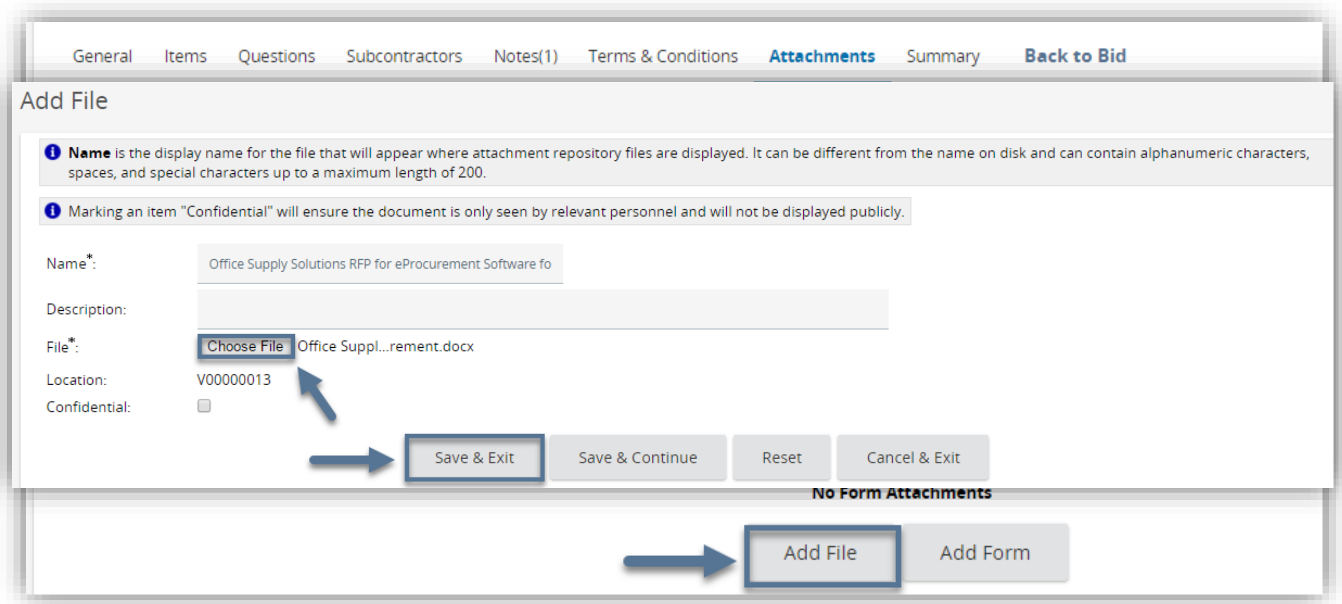
The purpose of the Attachments tab is to capture any supporting documentation related to the Quote that may be helpful to the Purchaser or evaluators of the Seller's Quote. Examples include proposal documents, product specifications, warranty documents and completed/signed forms required by the solicitation.

__**Files**__

Files are documents that are completed outside of the system, saved, and uploaded to the Quote.

Note: File names that include special characters (e.g., $, %, ~, etc.) are blocked by the system for security reasons. As such, the Seller should rename files on their local device before attempting to upload them to the Quote.

Add new files



Step 1: Click Add File

Step 2: Click Choose File (Google Chrome) or Click Browse (Internet Explorer, Mozilla Firefox)

The Seller clicks Choose File to upload a file from their computer.

Step 3: Select the file

Only one file can be selected at a time.

Step 4: Click Open

Step 5: Complete the fields

The Seller may update the Name for the attachment and enter a description that displays to the Agency user.

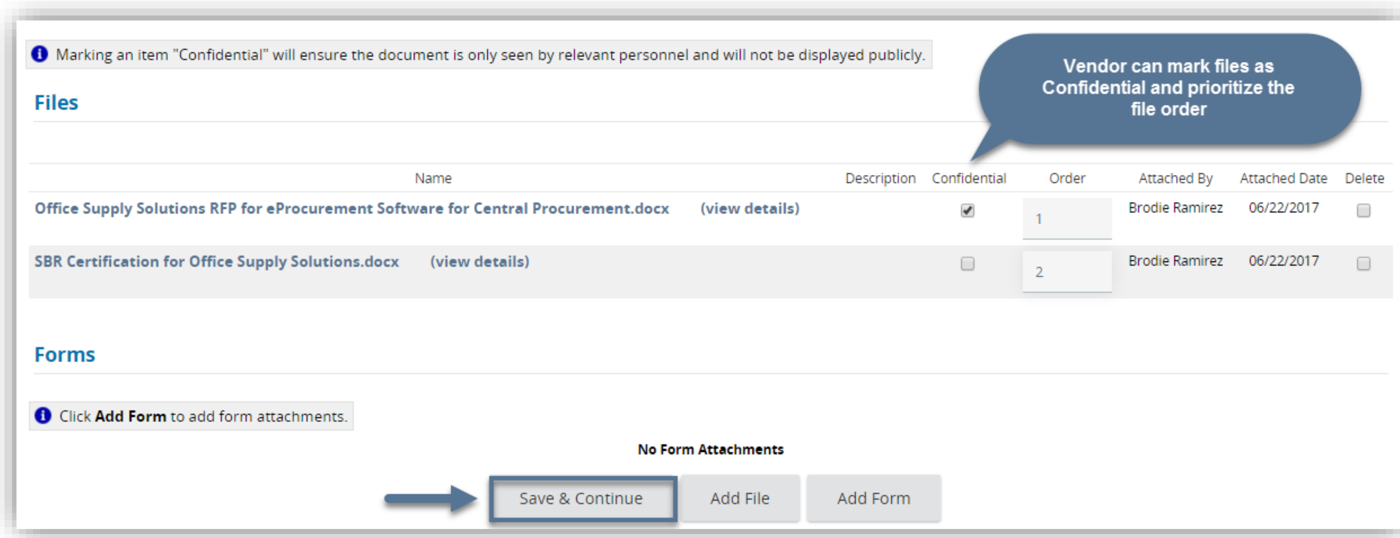
Step 6: Click Save & Exit

The Seller can click Save & Continue to save the current Attachment and add another one. The Seller can also click Cancel & Exit, and the Attachment will not be saved. The Seller will be returned to the previous screen.

Step 7: Update visibility and order (if applicable)

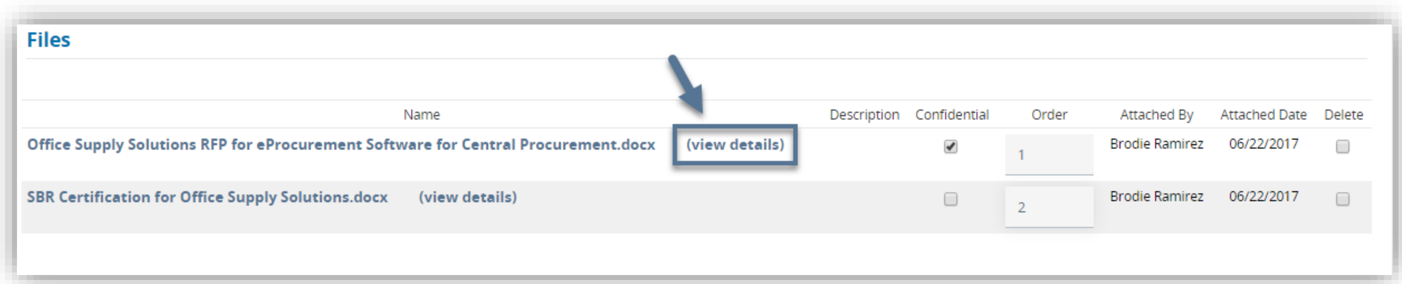
An Attachment that is marked as confidential can not be viewed by the public or other Sellers.

Step 8: Click Save & Continue



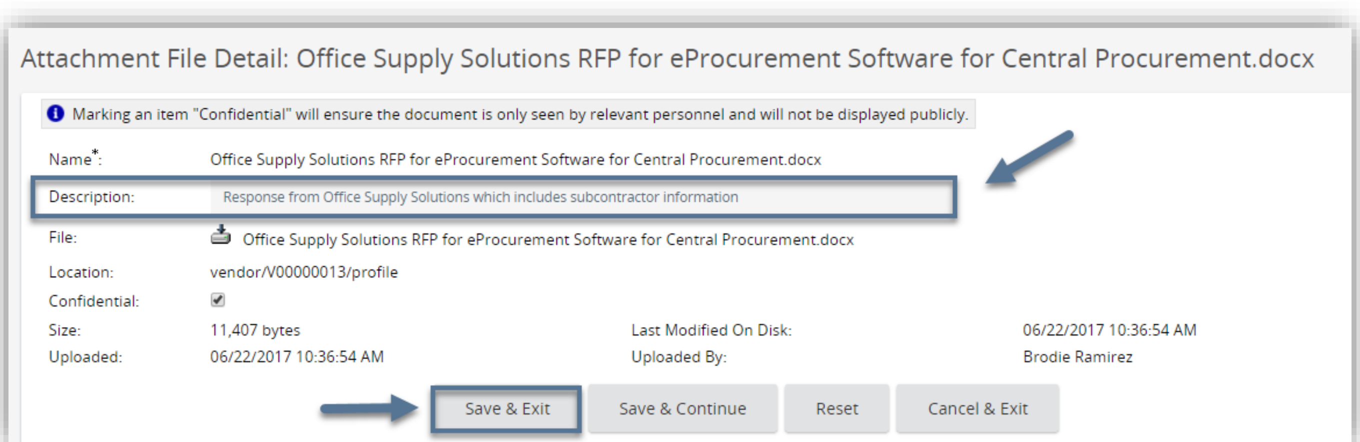
[Update file description]

Step 1: Click view details



Step 2: Update Description

Step 3: Click Save & Exit

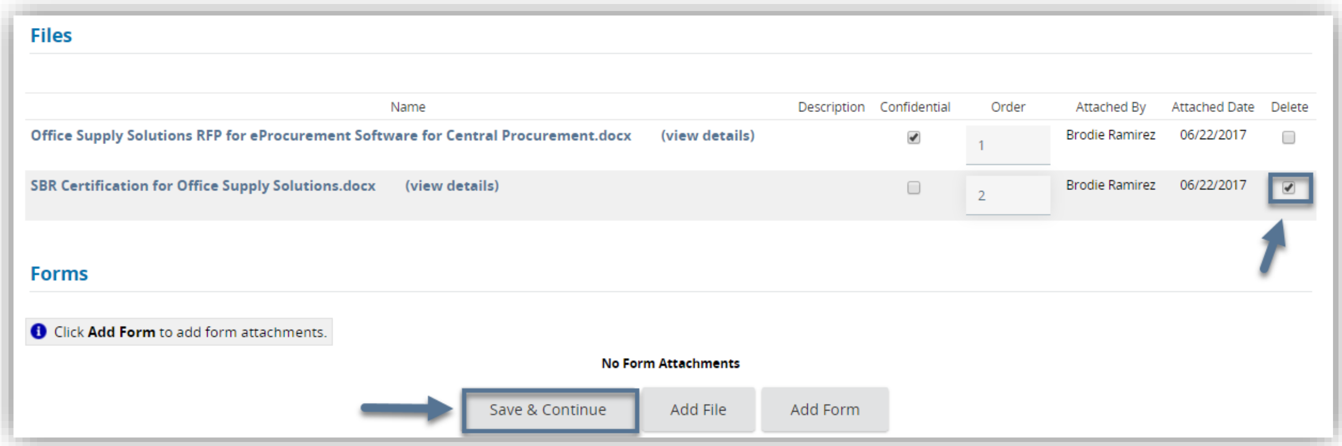


Delete the file

Step 1: Select Delete

The Seller may choose more than one file to delete from the Quote.

Step 2: Click Save & Continue



Summary Tab

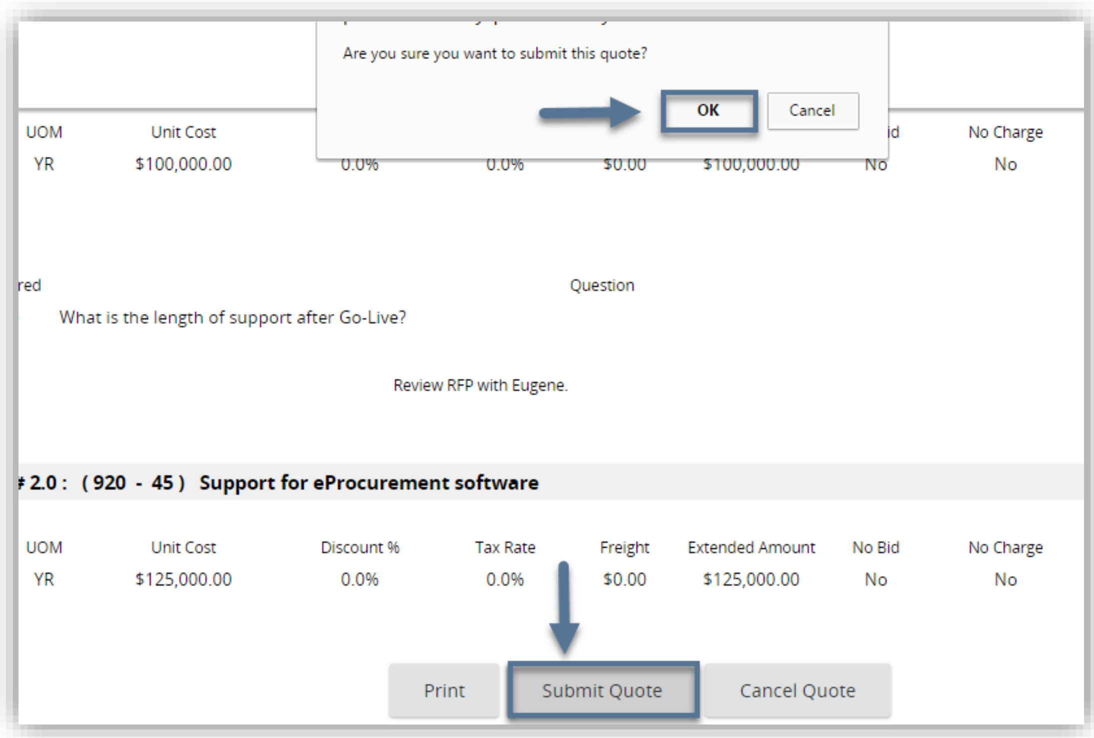
The Summary tab provides an overview of all the information provided by the Seller on the previous tabs for review prior to submitting the Quote. Once the Quote is submitted, the Seller cannot edit the document; however, the Seller may withdraw the Quote (for editing and resubmission) at any time before the Bid Opening Date and Time.

Step 1: Scroll to the bottom of the page

Step 2: Click Submit Quote

This will trigger a pop-up to ensure the Seller wants to submit the Quote.

Step 3: Click OK



Withdrawing or Modifying a Quote

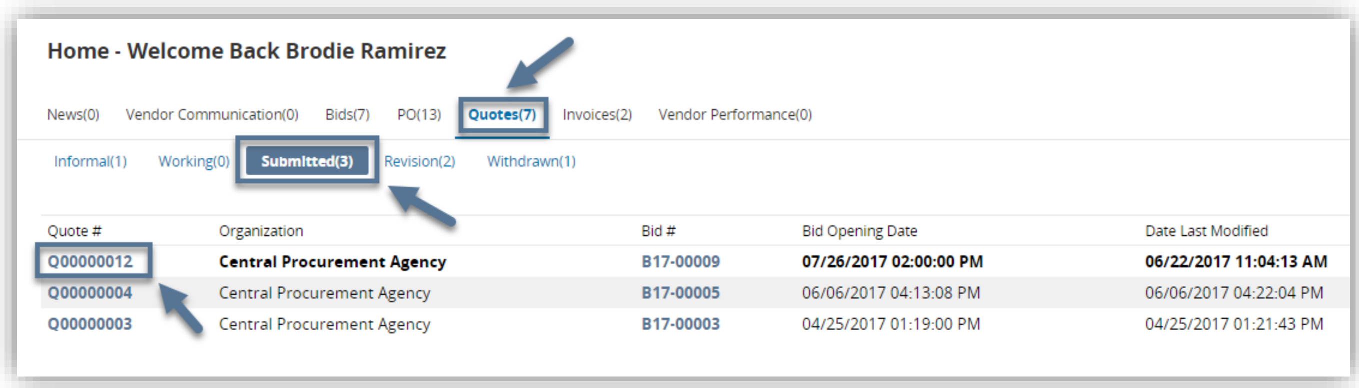
The purpose of withdrawing a Quote is to allow the Seller to update their Quote before the Bid Opening Date/Time or to withdraw it entirely. To update the Quote, the Seller must remove the Quote from consideration and reopen it. To be eligible for consideration, the Seller must resubmit the revised Quote before the Bid Opening Date/Time. The Seller cannot withdraw their Quote after the Bid Opening Date/Time.

Step 1: Click the Quotes tab from the Homepage

Step 2: Click Submitted

Only the first five Quotes are listed. Click View More at the bottom to view other submitted Quotes.

Step 3: Click the Quote number

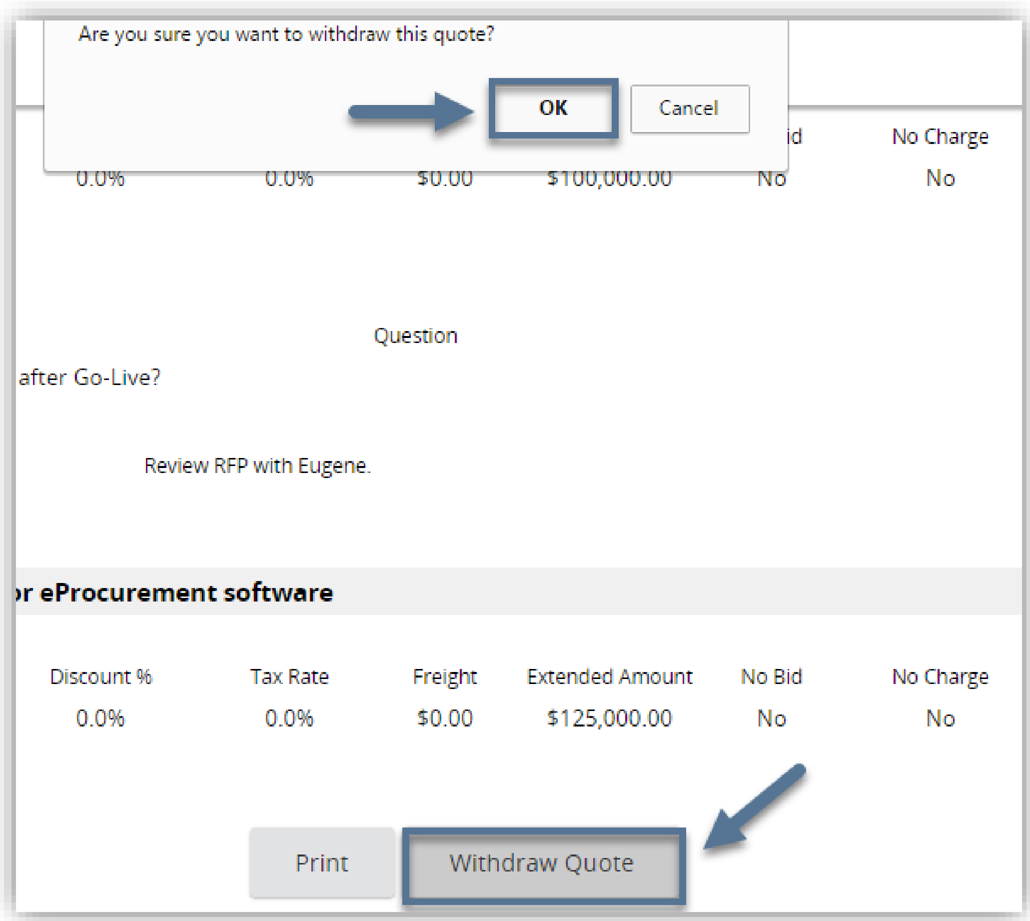


Step 4: Click the Summary tab

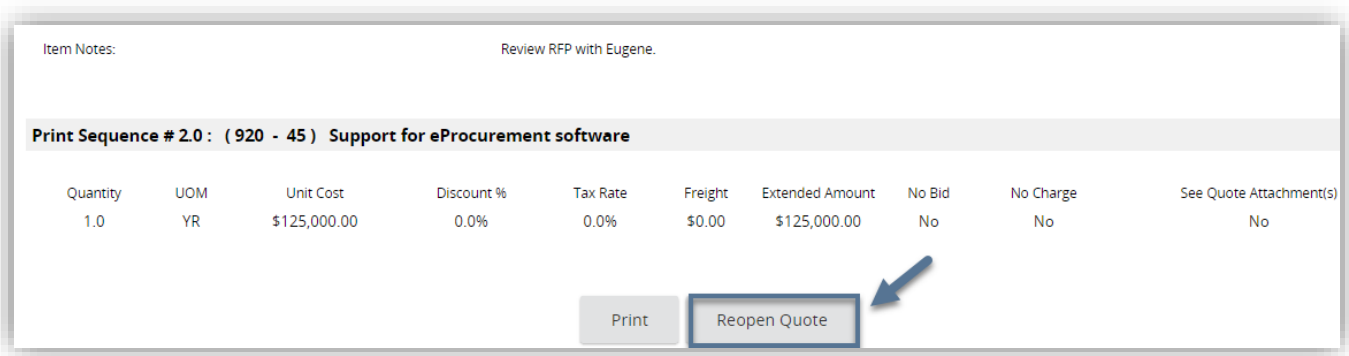
Step 5: Click Withdraw Quote

A pop-up displays "Are you sure you want to withdraw this quote?" to ensure that the Seller wants to withdraw the Quote.

Step 6: Click OK



Step 7: Click Reopen Quote



The Seller can update any tab on the Quote after it has been reopened.

Step 8: Update the Quote

See the section on Responding to a Solicitation for detail on updating the Quote.

Step 9: Click the Summary tab

Step 10: Click Submit Quote

A pop-up displays "Are you sure you want to submit this quote?" to ensure the Seller wants to submit the Quote.

Step 11: Click OK

The Quote will be submitted once again. If desired, the Seller may withdraw, reopen, and resubmit the Quote multiple times before the Bid Opening Date/Time.