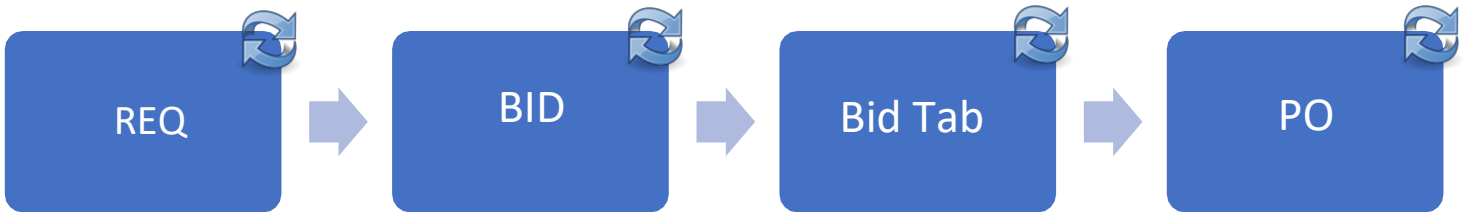


## State Use


GOAL: Complete a Procurement in Accordance with State Use Requirements


WHO: BP Users




Stage	Tab	Task	Who
<b>Requisition</b>			
Create Req	Login		Agency
	<ul style="list-style-type: none"> <li>✓🔒 Documents</li> <li>✓🔒 Requisitions</li> <li>✓🔒 New</li> </ul>		Agency
	<ul style="list-style-type: none"> <li>✓🔒 General Tab</li> </ul>	<ul style="list-style-type: none"> <li>✓🔒 Short Description: SUP – Description of Items Being Procured. This should uniquely identify the procurement as this is a searchable field.</li> <li>✓🔒 Requisition Type: Open Market</li> <li>✓🔒 Type Code: Select the appropriate type code as this is a searchable field. See Appendix C</li> <li>✓🔒 Special Procurement Type: State Use</li> <li>✓🔒 Save and Continue</li> </ul>	Agency
	<ul style="list-style-type: none"> <li>✓🔒 Items Tab</li> </ul>	<p><u>Option 1: Add Open Market</u></p> <ul style="list-style-type: none"> <li>✓🔒 Item Type: Normal and Narrative</li> <li>✓🔒 Description: Specification of the item that the Agency is procuring (This is a searchable field).</li> <li>🖨 Complete Fields – include quantity and estimated cost</li> <li>✓🔒 Save and Add New (Exit or Continue)</li> </ul> <p><u>Option 2: Search Items:</u></p> <ul style="list-style-type: none"> <li>✓🔒 Advanced Search</li> <li>🖨 Search Field Details</li> <li>✓🔒 Find It</li> <li>✓🔒 Select Items from Search Results</li> <li>✓🔒 Select Add to Req (Exit or Continue)</li> </ul>	Agency







<p>Items Tab – Address Sub-Tab</p> <p><b><u>If using this Sub-Tab, do not update addresses on the Address tab on the Header.</u></b></p>	<ul style="list-style-type: none"> <li>☞ <b>Go to the Items Tab – Address Sub-tab</b></li> <li>☞ Select the check box in the ‘Select All’ column next to the item to change address (Ship/Bill to Address)</li> <li><i>For DA Users:</i> <ul style="list-style-type: none"> <li>☞ Select desired address from dropdown menu</li> <li>☞ Click Apply to Selected</li> </ul> </li> <li><i>For BP Users:</i> <ul style="list-style-type: none"> <li>☞ Click <b>Q</b> at the lower part of the screen next to the Ship-to Address or Bill-to address</li> <li>☞ Enter Search Criteria for address desired</li> <li>☞ Click Find It</li> <li>☞ Select radio dial next to desired address</li> <li>☞ Click Select</li> </ul> </li> <li>☞ To apply changes to only selected items - Click <b>Apply to Selected</b></li> <li>☞ Click <b>Save &amp; Continue</b> to save changes and continue <i>*** To reset all addresses to the default from the Address Tab - Click Reset Selected to Header</i></li> </ul>	
<ul style="list-style-type: none"> <li>☞ Vendor Tab</li> </ul>	<p><u>Can be Added at Either the Req or Bid</u></p> <ul style="list-style-type: none"> <li>☞ Lookup and Add State Use Vendor</li> <li>☞ Find It</li> <li>☞ Select Vendor</li> <li>☞ Select Recommended</li> <li>☞ Save &amp; Exit</li> </ul>	
<ul style="list-style-type: none"> <li>☞ Address Tab</li> </ul> <p><u>Use only if addresses were not specified on individual items.</u></p>	<ul style="list-style-type: none"> <li>☞ To change Ship-to or Bill-to-Address, click to <span style="float: right;">search</span> for new address <span style="float: right;"><b>Q</b></span></li> <li>☞ Enter Search Criteria or enter nothing to receive all addresses</li> <li>☞ Click Find It</li> <li>☞ Select a new address</li> <li>☞ Click Select to update address</li> <li>☞ Click Save &amp; Continue to save changes and continue</li> <li>☞ To apply changes to Ship-to to all items on Requisition - Click Apply Ship-to to All Items</li> <li>☞ To apply changes to Bill-to to all items on Requisition - Click Apply Bill-to to All Items</li> <li>☞ <i>Important:</i> This will override any selections made at the address Sub-Tab for the Item Tab.</li> </ul>	Agency
<ul style="list-style-type: none"> <li>☞ Accounting</li> </ul>	<ul style="list-style-type: none"> <li>☞ Select Special Procurement Type: State Use</li> <li>☞ Add any additional information</li> <li>☞ Save &amp; Continue</li> </ul>	Agency
<ul style="list-style-type: none"> <li>☞ Attachments</li> </ul>	<ul style="list-style-type: none"> <li>☞ Add All Files or Forms including State Use Request Letter, etc.</li> <li>☞ Verify that Show Vendor is <u>NOT checked</u> for any file or form that should <u>not</u> be accessible to the public.</li> <li>☞ Save &amp; Continue</li> </ul>	Agency

	<input checked="" type="checkbox"/> Summary	<input style="vertical-align: middle;" type="hand"/> Review all Data <input checked="" type="checkbox"/> Submit for Approval <input checked="" type="checkbox"/> Scroll to the Bottom of the Summary Tab to Add New Approver: <ul style="list-style-type: none"> <li>○ Order Sequence: The State Use Approver should be the last approver. Enter a Number Higher than the Last Approver</li> <li>○ New Primary Approver: State Use Approver</li> </ul> <input checked="" type="checkbox"/> Continue The REQ Will Route for Approvals NOTE: Prior to approval, the State Use Committee will review. The Committee Authorization Letter and Certificate of Assurance will be attached.	Agency
Conduct Approvals 			
Process Bid	<input checked="" type="checkbox"/> Summary Tab	Once All Approvals Have Been Received <input checked="" type="checkbox"/> Convert to Bid <input checked="" type="checkbox"/> Bid Document Hyperlink	Agency
<b>BID</b>			
BID	<input checked="" type="checkbox"/> General Tab	<input checked="" type="checkbox"/> Type Code: 50 – State Use <input checked="" type="checkbox"/> Allow Electronic Response: Uncheck <input checked="" type="checkbox"/> Bid Available Date: Select <input checked="" type="checkbox"/> Bid Opening Date: A Minimum of 14 Days <input checked="" type="checkbox"/> Purchase Method: Open Market or Blanket as Appropriate <input type="checkbox"/> Info Contact: Complete <input checked="" type="checkbox"/> Enable Open Enrollment: Select <input type="checkbox"/> Bulletin Description: Enter <input type="checkbox"/> SPO Name: Enter <input checked="" type="checkbox"/> Special Procurement Rationale: State Use <input checked="" type="checkbox"/> Has the approved State Use Request Form and Authorization Letter been Attached: Yes <input checked="" type="checkbox"/> Is this subject to Small Business Set-Aside?: No	Agency
	<input checked="" type="checkbox"/> Items Tab	<input checked="" type="checkbox"/> Review and revise as necessary	Agency
	<input checked="" type="checkbox"/> Address	<input style="vertical-align: middle;" type="hand"/> Review and revise as necessary	Agency
	<input checked="" type="checkbox"/> Accounting	<input style="vertical-align: middle;" type="hand"/> Review and revise as necessary	Agency
	<input checked="" type="checkbox"/> Attachments	<input checked="" type="checkbox"/> Complete and Attach the Notice of Award <ul style="list-style-type: none"> <li>○ Show to Vendor: Uncheck</li> </ul> <input checked="" type="checkbox"/> Save and Continue	Agency
	<input checked="" type="checkbox"/> Notes	<input checked="" type="checkbox"/> Add as necessary	Agency
	<input checked="" type="checkbox"/> Bidders Tab	<input checked="" type="checkbox"/> Lookup and Add Vendors for all Commodity Codes and/or <input checked="" type="checkbox"/> Lookup and Add Vendors Based on Search Fields <input checked="" type="checkbox"/> Find It <input checked="" type="checkbox"/> Select vendors <input checked="" type="checkbox"/> Save & Continue Select <input checked="" type="checkbox"/> Unrestricted bid, all vendors can view and respond <input checked="" type="checkbox"/> Hide Bid Holder List on Vendor Side <input checked="" type="checkbox"/> Save & Continue	Agency

	✓ Amendments	<p>If needed to update the bid</p> <ul style="list-style-type: none"> <li>✓ Create Bid Amendment</li> <li>✓ Enter changes to Tabs and Save and Continue</li> <li>✓ Attach Any Required Documents and Save and Continue</li> <li>✓ Comment Box: Leave blank if you do not wish to send the Amendment to vendors. Add Comment if You Will Send to Vendors</li> <li>✓ Save &amp; Continue</li> <li>✓ Return to Bid</li> <li>✓ Set a Reminder to the SPO to Post the Amendment</li> <li>✓ Click Amendment number</li> <li>✓ Verify Show to Vendor Option</li> <li>✓ Apply Bid Amendment</li> </ul>	Agency/SPO
	✓ Reminders	<ul style="list-style-type: none"> <li>✓ Add as necessary</li> </ul>	Agency
	✓ Summary	<ul style="list-style-type: none"> <li>✎ Review all data</li> <li>✓ Submit for Approval</li> <li>✓ Continue</li> </ul>	Agency
<b>Conduct Approvals</b> 			
Send Bid	✓ Summary	<ul style="list-style-type: none"> <li>✓ Update Bid Dates as Necessary</li> <li>✓ Select Change Bid status to 'Sent' and Notify Vendors</li> <li>✓ Send Bid</li> <li>✓ Click OK to Notify Vendors</li> </ul>	Agency
<b>BID Tab</b>			
Create Quote(s)	✓ Summary Tab	<ul style="list-style-type: none"> <li>✓ Access Bid</li> <li>✓ Open Bid</li> <li>✓ Bid Tab</li> <li>✓ Create New Quote</li> </ul>	Agency
	✓ General Tab	<ul style="list-style-type: none"> <li>📄 Vendor Name</li> <li>✓ Received Date</li> <li>✓ Are you registered and active in the IPG?</li> <li>✓ Did you attach Forms B?</li> </ul>	Agency
	✓ Items Tab	<ul style="list-style-type: none"> <li>✓ Enter Price</li> <li>✓ Save &amp; Continue</li> </ul>	Agency
	✓ Subcontractors Tab	<ul style="list-style-type: none"> <li>📄 Enter all Subcontractors Over \$50,000</li> <li>📄 Enter BEP Subcontractors if applicable</li> </ul>	Agency
	✓ Terms & Conditions Tab	<ul style="list-style-type: none"> <li>✎ Review Terms and Conditions</li> <li>✓ Enter Response</li> </ul>	Agency
	✓ Attachments Tab	<ul style="list-style-type: none"> <li>✓ Add All Files or Forms including Quote Documents, Communications, etc.</li> <li>✓ Apply</li> <li>✓ Save &amp; Continue</li> </ul>	Agency

	<input checked="" type="checkbox"/> Evaluations Tab <input checked="" type="checkbox"/> Preference Tab <input checked="" type="checkbox"/> Reminders Tab <input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> N/A <input checked="" type="checkbox"/> N/A <input checked="" type="checkbox"/> Set as Needed <input checked="" type="checkbox"/> Submit Quote <input checked="" type="checkbox"/> Back to Bid	Agency Agency Agency Agency
Tabulate Bids	<input checked="" type="checkbox"/> Bid Summary Tab <input checked="" type="checkbox"/> All Tabs	<input checked="" type="checkbox"/> Bid Tab <input checked="" type="checkbox"/> Quotes to be Considered <input checked="" type="checkbox"/> Save & Continue <input checked="" type="checkbox"/> Review for Responsiveness	Agency / BEP/ SPO Agency
Award Bid	<input checked="" type="checkbox"/> Items Tab <input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> Select Vendor for Award <input checked="" type="checkbox"/> Select Award All <input checked="" type="checkbox"/> Save & Continue Review Data <input checked="" type="checkbox"/> Submit for Approval	Agency Agency
Conduct Approvals 			
PPB Reminder	<input checked="" type="checkbox"/> Reminder Tab <input checked="" type="checkbox"/> Reminder Tab	<input checked="" type="checkbox"/> Due Date: 14 Days <input checked="" type="checkbox"/> Comment: Waiver Request <input checked="" type="checkbox"/> Remind Whom: PPB Waiver Request <input checked="" type="checkbox"/> Days Prior to Remind: 13 Days <input checked="" type="checkbox"/> Send Email: Check <input checked="" type="checkbox"/> Save & Continue <input checked="" type="checkbox"/> Receive Reminder Response	SPO SPO
Convert to PO	<input checked="" type="checkbox"/> Documents	Once All Approvals Have Been Received, including the PPB <input checked="" type="checkbox"/> Documents <input checked="" type="checkbox"/> Bids <input checked="" type="checkbox"/> Ready for Purchasing <input checked="" type="checkbox"/> Bid # Link	Agency
	<input checked="" type="checkbox"/> Bid Tab <input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> Create PO <input checked="" type="checkbox"/> Select PO Creation Options	Agency

	<input type="checkbox"/> Summary Tab	<input type="checkbox"/> Convert to PO  <u>Select ONE of the Following:</u> 1. Single PO Using Header Recommended Vendor OR 2. Single PO Using Selected Reference Vendor OR 3. Single PO Using Item Recommended Vendor OR 4. Choose Vendors <input type="checkbox"/> Include Vendor Informal Quote Attachments <input type="checkbox"/> Convert to PO <input type="checkbox"/> OK	Agency
<b>Purchase Order</b>			
Process PO	<input type="checkbox"/> Summary Tab	<input type="checkbox"/> New PO Hyperlink to View PO	Agency
	<input type="checkbox"/> General Tab	Complete Required Fields, including: <input type="checkbox"/> Type Code: State Use <input type="checkbox"/> Publication Date: Date the Bid was Published <input type="checkbox"/> Actual Contract Begin Date <input type="checkbox"/> Actual Contract End Date <input type="checkbox"/> Renewal information (if applicable) <input type="checkbox"/> Fiscal Year of Obligation: Choose the fiscal year in which the contract will start <input type="checkbox"/> Master Contract: Yes or No <input type="checkbox"/> PO TYPE: Open Market <input type="checkbox"/> Blanket (SAP Only - when syncing with SAP) <input type="checkbox"/> Date Contract Executed: Last Signature <input type="checkbox"/> Save & Continue	Agency
	<input type="checkbox"/> Items Tab	<input type="checkbox"/> Update as Needed	
	<input type="checkbox"/> Control Tab	Select: <input type="checkbox"/> Cooperative Purchasing Allowed: Check <input type="checkbox"/> Add New: Search and Add Agenc(ies)/Departments allowed to purchase from contract <input type="checkbox"/> Contract Begin Date <input type="checkbox"/> Contract End Date <input type="checkbox"/> Dollar Limit <input type="checkbox"/> Save and Continue	Agency
	<input type="checkbox"/> Attachment Tab	Add any attachments – See Appendix B <input type="checkbox"/> Executed Contract, if available	Agency
	<input type="checkbox"/> Summary Tab	<input type="checkbox"/> Update Any Red Errors <input type="checkbox"/> Submit for Approval <input type="checkbox"/> Continue	Agency
Conduct Approvals 			

	 Documents	After All Approvals Have Been Received  POs  Ready to Send  PO # Hyperlink  Apply Notification Action to Selected  OK	Agency
Create Change Orders		See Change Order Manual for Instructions on Attaching the Executed Contract if not Completed in the Previous Step	Agency