

How to Publish Sole Source Notices to the Procurement Portal

7/1/2015

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This is a step by step instructional guide on how agencies will enter/publish their Sole Source contract notices to the State of MS Procurement Portal (MS Procurement Opportunity/ Contract Search) on the procurement portal website for at least fourteen (14) days the terms of the proposed sole source per 3.109.02 of the Mississippi Procurement Manual.

Step 1 – Create an RFx using Bid type RFIN (Request for Information)

Procurement > Procurement Work Center > Strategic Sourcing > Create Documents > RFx>

Select Bid Type (RFIN) > Start

- a) In the RFx Information > RFx Parameters tab enter the following data elements.
 - i) Start Date/Time (Advertisement Notice Start date and time)
 - ii) Bidders Submission Deadline Date/Time (Latest date and time letters can be submitted)
 - iii) Opening Date/Time (Earliest date and time in which bid response can be opened)
 - iv) Surrogate Bid Entry Submission Deadline/Time (Latest date and time paper letters can be entered into the system by the agency)

Create RFx

RFx Number 315000020 Smart Number 1130-15-R-RFIN-00002 Type Req. for Information Status In Process Created On 06/05/2015 11:35:46 Created By Robert Fulcher

Number of Suppliers 0 Number of Items 0 Version Number Version type Active Version External Version Number

Edit Close Publish Save Check Export Print Preview Import

RFx Information Bidders Items Notes and Attachments Weights and Scores Approval Tracking

RFx Parameters Questions Notes and Attachments Table Extension Payment Synopsis User-Specified Status

Identification

Smart Number: 1130-15-R-RFIN-00002
 Smart Number is External

RFx Number: 315000020

RFx Type: Req. for Information

Product Category:

Publication Type: Public RFx

Organization

Purchasing Organization: State of Mississippi - Purchasing

Purchasing Group: 1130 OVSIGHT OPTFM [Show Members](#)

Dates

Start Date: 12:00:00 am

Surrogate Bid Entry Deadline: * 12:00:00 am

Opening Date: * 12:00:00 am

Event Parameters

Currency: USD

Target Value: 0.00 USD

Detailed Price Information: No Price

Follow-On Document: Purchase Order or Contract

Bidder Can Change RFx Responses:

Allow Multiple RFx Responses for Each Company:

Display Weighting to Bidders:

Major Procurement Category: *

Sub Procurement Category: *

Electronic Responses Only:

Document Builder Doc Type: ZRFX_AMEND

Confidential Document:

Bidder Submission Deadline: * 12:00:00 am

b) Enter the Major Procurement Category “ Commodities”

c) Enter the Sub Procurement Category “Sole-Source Notices”

Create RFX

RFX Number 3150000020	Smart Number 1130-15-R-RFIN-00002	Type Req. for Information	Status In Process	Created On 06/05/2015 11:35:46	Created By Robert Fulcher
Number of Suppliers 0	Number of Items 0	Version Number	Version Type Active Version	External Version Number	

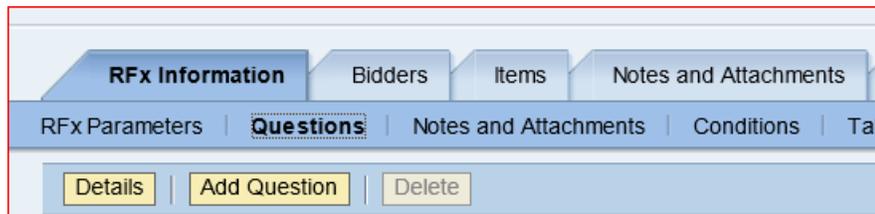
Edit Close Publish Save Check Export Print Preview Import

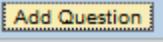
RFX Information Bidders Items Notes and Attachments Weights and Scores Approval Tracking

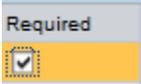
RFX Parameters Questions Notes and Attachments Table Extension Payment Synopsis User-Specified Status

<p>Identification</p> <p>Smart Number: <input type="text" value="1130-15-R-RFIN-00002"/></p> <p><input type="checkbox"/> Smart Number is External</p> <p>RFX Number: <input type="text" value="3150000020"/></p> <p>RFX Type: <input type="text" value="Req. for Information"/></p> <p>Product Category: <input type="text"/></p> <p>Publication Type: <input type="text" value="Public RFX"/></p> <p>Organization</p> <p>Purchasing Organization: <input type="text" value="State of Mississippi - Purchasing"/></p> <p>Purchasing Group: <input type="text" value="1130 OVSIGHT OPTFM"/> Show Members</p> <p>Dates</p> <p>Start Date: <input type="text" value="12:00:00 am"/></p> <p>Surrogate Bid Entry Deadline: * <input type="text" value="12:00:00 am"/></p> <p>Opening Date: * <input type="text" value="12:00:00 am"/></p>	<p>Event Parameters</p> <p>Currency: <input type="text" value="USD"/></p> <p>Target Value: <input type="text" value="0.00"/> USD</p> <p>Detailed Price Information: <input type="text" value="No Price"/></p> <p>Follow-On Document: <input type="text" value="Purchase Order or Contract"/></p> <p>Bidder Can Change RFX Responses: <input checked="" type="checkbox"/></p> <p>Allow Multiple RFX Responses for Each Company: <input checked="" type="checkbox"/></p> <p>Display Weighting to Bidders: <input type="checkbox"/></p> <p>Major Procurement Category: * <input type="text"/></p> <p>Sub Procurement Category: * <input type="text"/></p> <p>Electronic Responses Only: <input type="checkbox"/></p> <p>Document Builder Doc Type: <input type="text" value="ZRF_X_AMEND"/></p> <p>Confidential Document: <input type="checkbox"/></p> <p>Bidder Submission Deadline: * <input type="text" value="12:00:00 am"/></p>
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Step 2 – Add Questions for vendors



- 1) Add header questions, *if necessary*. Such questions could be: “Can you provide the commodity in question?”
- 2) To add questions click the sub tab “Questions” by RFX Parameters and then click the button  and search for questions relevant to RFX.

- (1) These questions can also be marked as required  which will mean that they must be answered prior to the response being accepted in the system.
- (2) Additionally these will print on the RFX output form.

Step 3 – Add Items to the RFX

1) Once you click the Items tab, ensure that you review the four checkbox options that control the bids:

- **RFX Response Required for All items** – check if all items within the notice require a response
- **Bidder Can Add New Items** – ensure this box is unchecked if no alternate commodities can be proposed
- **Allow RFX Response Modification** – Allows the bidders to make changes to their offers until the submission deadline (this should be checked on)
- **Bidder Can Change Quantities** – this box will be unchecked. Items/services advertised should have a fixed quantity (i.e. quantity of “1”).

2) Click the **Add Line** button to select the “Product Category” from the drop down.

- To search for a “Commodity” Product Category, use this link to the [NIGP Lookup](#), then manually enter into the field.

Line Number	Internal Item Number	Item Type	Option Type	Product ID	Description	Lot	Allow RFX Response Modification	Product Category	Revi
1		Product Category					<input type="checkbox"/>	91802	

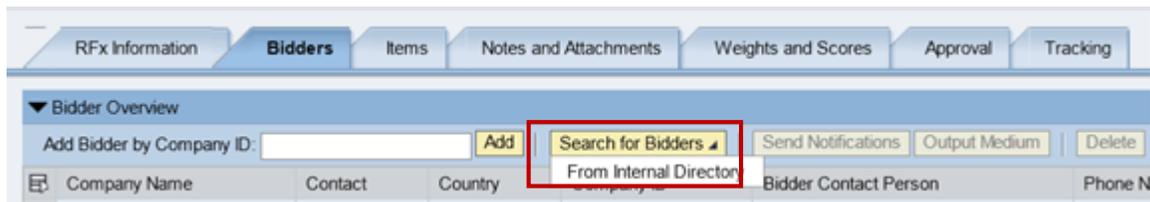
3) Enter a short description (40 characters or less) of the commodity(s) being advertised.

Line Number	Internal Item Number	Item Type	Option Type	Product ID	Description	Lot	Allow RFX Response Modification	Product Category	Revi
1		Product Category			Sole Source Consulting Services		<input type="checkbox"/>	91802	

Step 4 – Add Bidders to the RFx

- d. Click on the **'Bidders'** tab to search for appropriate bidders that you want to add to this RFx.

Next, click on **Search for Bidders** and select "From Internal Directory" which appears in the dropdown.



View By: **Bidders Including Contact Persons**

Search by Contact Persons

Vendor ID:

Vendor / Last Name: *SOMS*

E-Mail:

DUNS:

Postal Code:

Maximum Number of Hits:

Street:

County:

Tax ID:

Legislative/Congressional District:

Product Category:

Country:

Vendor / First Name:

Women Owned:

City:

State:

Vendors Headquarter State:

Permanent Staffed office in Mississippi:

Certified Minority Indicator:

Self-Certified Indicator:

Search

Bidders

Organization Name	Business Partner Organization	DUNS	Business Partner ID	Cont
BROWN BUCHANAN SESSOMS PA	3100017043			
SOMS - STATE OF MS	3102000073		44758	STA
SOMS - STATE OF MS	3102000073		44759	Stat
SoMS	3102002120			

Add Selected Bidders | Cancel

- e. Ensure the search view is by "Bidders Including Contact Persons"

- i. Enter the Vendor/Last Name "SOMS" and click the **Search** button.
- ii. Once the bidder results have been returned you may highlight the applicable bidder, and then click the button **Add Selected Bidders**.

Step 5 – Add Notes and Attachments to the RFX

1. Add appropriate “Notes and Attachments” at the header level tab. This can be done by clicking on the Notes and Attachments tab and clicking the “Add” button and a dropdown list will appear. *The notes and attachments can/may be Sole Source forms that your agency has created for the vendor to complete.*



The screenshot shows the MAGIC RFX system interface. At the top, there are buttons for Close, Publish, Save, Check, Export, Print Preview, and Import. Below these are several tabs: RFX Information, Bidders, Items, Notes and Attachments (highlighted with a red box), Conditions, Weights and Scores, Approval, and Tracking. Under the 'Notes and Attachments' tab, there is a 'Notes' section with an 'Add' button (highlighted with a red box) and a 'Clear' button. Below this is a table with columns for 'Assigned To', 'Category', and 'Text Preview'.

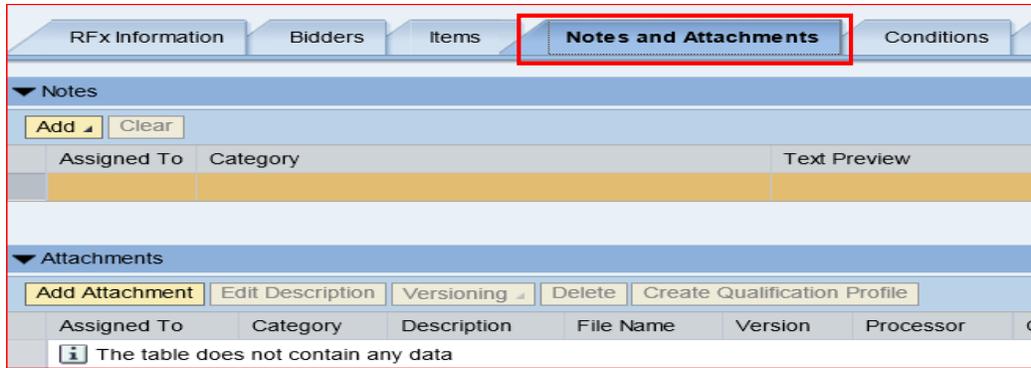
The text that should be added is indicated below:

- Header Tendering Text** – This is a detailed description of the sole source commodity. It will print on the RFX form under “Notice to Vendor” section of the form. Online bidders will also see this text field when displaying the notice within MAGIC.
- Synopsis text** (required) – This should be a short concise description of 60 characters or less that will appear on the bid board and print on the RFX Form under “Notice to Vendor” section. Online bidders will also see this text field when displaying the notice within MAGIC.
Example text: Sole Source Notice for MRI Machine
- Additional Contact Info** – This is a more detailed description of contact information, i.e. who/where paper letters and/or questions related to the notice should be submitted. It will print on the RFX form under “Additional Contact Info” section.

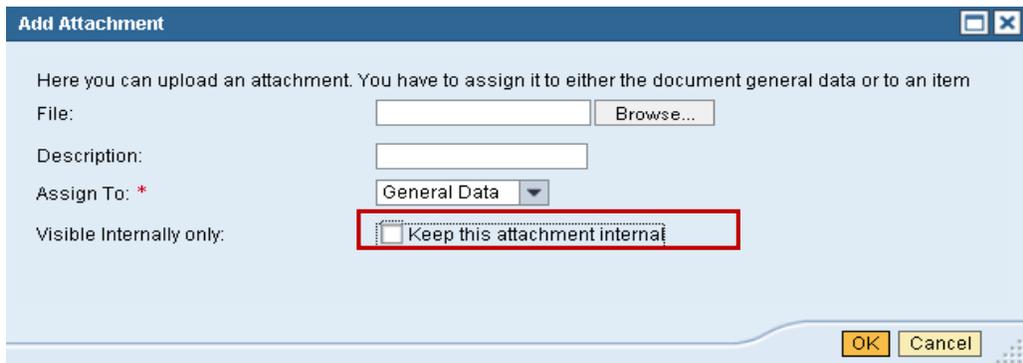
Example text:

Please submit notice to:

Joe Smith
 Dept. of Mississippi
 123 Main Street
 Any City, MS 39201



- 3) Add "Attachments" by click on the **Add Attachment** button.
- 4) Note: to have the document visible to the vendor(s); uncheck the box that indicates "Visible internally only"



- i. Attachments can be in any file extension. However, its normally best practice that we use common file extension such as pdf, xls, or doc because the prospective bidders may not have the appropriate software for viewing.
- ii. Please refer to section 3.109.02 for all information that is required to be addressed in the Sole Source notice of intent to purchase.

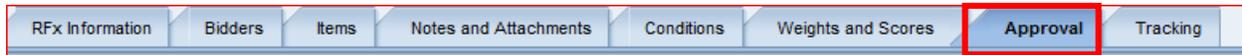
Publish the RFX by clicking on **Publish button do this after you have confirmed that the bid request has all the relevant information populated and attached. The publish button is only visible in "Edit" mode.**

Step 6 – Approve RFx by going to the Universal Worklist

The RFx only requires Agency Buyer Manager approval, however if additional approvals are required, this can be done using the Adhoc Approver functionality.

Note: All approvals must be applied to the RFx prior to RFx Start Date/Time.

- a) To add an adhoc approver, go to the Approval tab>select the Add Approver button

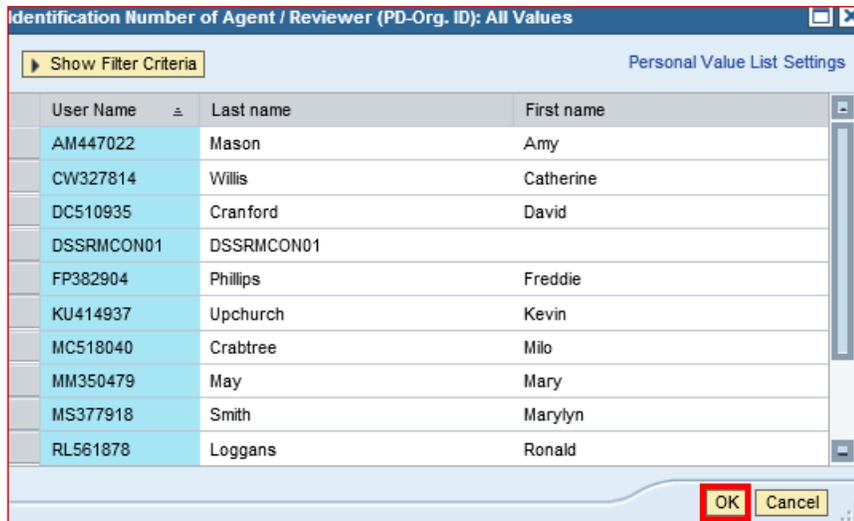


- b) Select the 

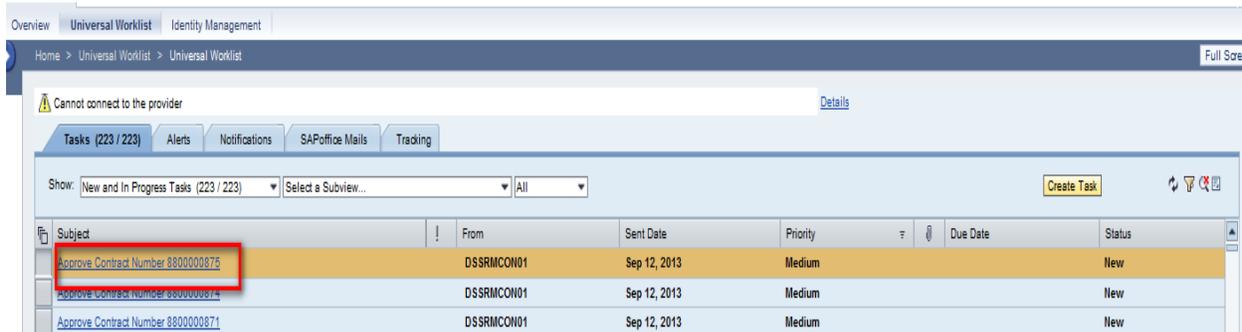
- c) Enter the Approver ID or search by clicking the search icon.



- d) A list of users from that agency's Purchasing Group will be displayed. Click on the desired user by highlighting the line and select the "OK" button.



NOTE: Once the buyer has selected the individual from their Purchasing Group as an Adhoc Approver, the approver will proceed to the Universal Worklist, click on the work item. The document will open and once the document has been reviewed, the appropriate decision can be made, “Approve” or “Reject”.



Once the notice has been published and approved, it will display on the MS Procurement Opportunity/Contract Search on the Start Date and Time.

IF NO OBJECTIONS ARE RECEIVED BY THE AGENCY ONCE THE 14 DAY ADVERTISING PERIOD IS OVER, THE AGENCY SHOULD SUBMIT A P-1 SOLE SOURCE APPROVAL REQUEST TO OPTFM. IF OBJECTIONS ARE RECEIVED, THEN REGULATIONS IN 3.109.02 OF THE PROCUREMENT MANUAL SHOULD BE FOLLOWED.