



SUNGARD PUBLIC SECTOR
BID/QUOTE MANAGEMENT

IFAS
Integrated Financial &
Administrative Solution

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1 Overview

1.1 Bid/Quote Overview

1.1.1 Prose

Bid/Quote Introduction

The Bid/Quote Management Reference Guide provides you with an overview of the bid process, terms useful for understanding the process, and descriptions of the screens used in the bid/quote management process.

1.1.2 Key Features

Bid/Quote Management Datasheet

Major Features

- Enter phone quotes in real time.
- Automatically create purchase orders.
- Develop formal bid cycles with their associated tasks required.
- Track vendor performance.
- Track activity related to the bid through the award and beyond.
- Update existing purchase requisition items, either individually or all items associated with a request number.
- Update a single purchase request, or join multiple purchase requests into a single purchase order.
- Setup multiple tasks, used in conjunction with creating any number of “bid cycles”. Each bid is associated with a unique cycle ID, specifying the number of days required to complete the entire bid process.
- Directly update the price of individual items on a purchase request. Copy existing purchase requests into new purchase request numbers.
- Select multiple vendors based upon multiple product codes, multiple commodity codes, and multiple vendor association values.
- Bid and Quote Management integrates with Purchasing, Encumbrances, General Ledger, Job Ledger and Person/Entity.

Reporting

Access to information is straightforward and easy. The Bid and Quote Management System includes standard reports and immediate online inquiry to any data in the system. Security-protected reports can be run at the user's networked computer or via the Internet from any Web browser.

Standard reports available include:

- Bid Document
- Bid Document -Detailed
- Items Requiring a Bid
- Bid Items to Select For Bid
- Items Requiring a Quote
- Detailed Quote Report
- Person Entity Report
- Purchasing Information
- All Vendors by Product Code
- Report of Vendors Selected For Bid
- General Bid Information
- Formal Bid Log Report
- Bid Expiration Report
- Detailed Task Report
- Detailed Cycle Report
- Cycle Completion Report
- Vendor Bid Total

1.1.3 Getting Started

Steps in the Bid Process

Cycle/Task Creation and Tracking: (Internal Tracking)

- Identify tasks needed to complete the bid
- Estimate days required to complete each task
- Organize tasks in sequential order: (Cycle Definition)
- Assign tasks to users/personnel
- Record tasks completion info

Create Informal Quote

- User creates purchase request (PR)
- PR approval & flagged as QUOTE NEEDED
- Selection of QUOTE for creation
- Obtain quotes and record
- Award quote
- Create purchase order

Create Formal Bid

- User creates purchase request (PR)
- PR approval & flagged as BID NEEDED
- Consolidate similar items from approved bid requests
- Record bid information
- Identify internal cycle definition for the bid
- Determine and record bidders for bid invitation (optional)
- Create bid invitations (optional)
- Mail invitations (optional)
- Receive and record invitation responses (optional)
- Determine and record bidders for bid document
- Create bid document
- Mail bid document
- Receive and record bid responses
- Award of items
- Create purchase order

Required Interfaces

- Purchasing System (Interface is Bid Number and Product Code) **Note:** You must create a purchase request prior to entering the Bid.
- Purchase Request Number **Note:** the Bid number, Contract number and Purchase Request number must be different.
- Accounts Payable (Interface is Bid Number)
- Product Information (Interface is Product Code)
- Vendor Information (Interface is Vendor ID and Product Code)
- Commodity and User Selection or Association Code
- Stores Inventory (Interface is Product Code)

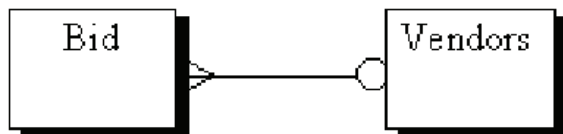
Bids: Information/Items to Track

- Bid/Quote Information
- Bid/Quote Items
- Bid/Quote Item Prices
- Bid/Quote Award Information
- Purchase Order Information
- Different Types of Bids
- Bid/Invitation Information
- Bid/Invitation Responses
- Vendor Information
- Buyer Information
- Cycle/Task Definitions
- Cycle/Task Day Estimates & Actual
- Buyer Performance Data
- Text File References
- Term and Condition Information
- Contact Information
- Bid/Quote Free-Form Comments
- Bid History
- User Security Tables
- Complete Logs of Amendments
- Approval Tables

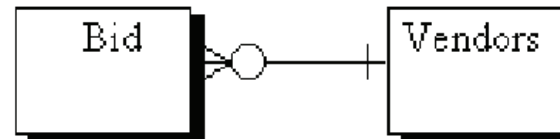
1.1.4 Flow Diagram

Entity Relationships Diagram

Example #1



Example #2



Each bid has 1 or no vendors

Each bid has only 1 vendor

Each vendor has 1 to many bids

Each vendor has 0 to many bid

1.1.5 Basic Steps

1.2 Bid Online Overview

1.2.1 Prose

Bid Online Overview

Bid Online requires and directly integrates with the Bid/Quote Management module. Bid Online also retrieves information directly from the Purchasing module. The communication with other modules is accomplished via http web service calls. This allows the external components of the Bid Online server to be located almost anywhere in the organization's network.

1.2.2 Key Features

IFAS: Bid Online

Bid Online streamlines the bid process to create efficiency for organizations and their vendors, and lowers costs through greater product selection. Bid Online addresses every step of the exchange of bid information between organization and vendor, from vendor notification to response assistance to bid evaluation. Bid Online is fully integrated with IFAS Purchasing and Bid/Quote Management.

Bid Online's interface walks administrators through the creation of a bid, automating steps of the process based on the information provided. Organizations can improve productivity by reducing data entry, and create efficiency by automating aspects of the bid process.

An important function of Bid Online is to increase the number of vendor responses for bids. Bid Online accomplishes this by providing more visibility for bids via an external Website. Bid Online also automatically notifies vendors of new postings, amendments, and awards via e-mail. Finally, because vendors continually update the database, the list of potential bidders is always growing. With a larger pool of bidders, organizations can choose the best combination of quality and cost.

Major Features

- Integrated with Bid/Quote Management and Purchasing modules
- Provides external Web location for bid placement; acts as interface between buyers and vendors
- Bids can be set up for automatic display on the external website based on status and type
- Buyers can view all bids or only those assigned to them
- Buyers can view status to see how many vendors have responded to a particular bid
- Supports amendments, including notification to responding bidders and acknowledgement when amendment has been reviewed
- Automates encryption and decryption of sealed bids
- Responses can be directly entered online or uploaded as attachments
- Registered vendors can create and modify their vendor profile and contact information, including the list of commodities for which they would like notification
- Vendors can submit questions to the responsible buyer, who can then post the answer to all vendors, or privately to the asking vendor
- Authorization security permits access between only vendor and buyer

Requirements

Bid Online requires existing 7i architecture. Bid Online sites must be live and operational on the 7i version of Bid/Quote Management and Purchasing modules. Web functionality resides within the Dashboard Portal Framework. Attachments require Documents Online. Supported browsers include Internet Explorer 6.0+ and Netscape 7.1+ for Windows, Netscape 7.1+ and Safari for Macintosh. Clients must license either the 5-digit NIGP or 8-digit UNSPSC commodity code set.

2 Setup

2.1 Bid/Quote Setup

2.1.1 Basics

Terms and Definitions

Subsystem Menu Options

It is helpful to be familiar with the following abbreviations.

- AP** Accounts Payable
- BK** Bank Management
- EN** Encumbrances - (updated from PO print activity)
- FA** Fixed Assets
- NU** Nucleus- (System Parameters and User ID files & Common Codes)
- PE** Person/Entity - (Central Entry for Customer and Vendor ID Inf.)
- RX** Ad Hoc Report Writer - (Pulls Reports from GL and En Databases)
- TF** Table Formatter
- SI** Stores Inventory
- AR** Accounts Receivable
- GL** General Ledger
- PC** Position Control
- PO** Purchasing
- PY** Payroll
- SI** Stores Inventory
- SY** System Level Software- (abnormal software termination updates from nucleus database: ROOTDB)
- HR** Human Resources
- GM** Grant Management
- PM** Project Management
- BQ** Bid/Quote Management
- CM** Contract Management

TD TRIAD
WO Work Order

Additional Terms

Mask: This is the phrase used to describe a series of entries which moves you interactively through more than one entry question.

Interfund: Transactions which move information, date, transactions between funds.

Intrafund: Transactions which move information, date, transactions within a fund.

Printing and Distribution: Moves the transaction file from a temporary file to a permanent file to change this entry you must use a credit item, void check, etc.

General Ledger Terms

GLDB: General Ledger database. The file structures, which hold the budgets and transactions that, make up the client's accounting information.

GL Side: One of two parts of the GLDB which contain one or more structural definitions of ledgers.

JL Side: One of two parts of the GLDB, which contains one or more structural definitions of ledgers. The JL Side is an optional definition. (If used you would record transactions for Projects in these ledgers.)

Ledger: A formal definition of an accounting structure, which is supported in either the GL Side or the JL Side.

Organizational Parts (Org.Parts): A discrete part of a Ledger account identification, which specifies some aspect of the organization, such as "Fund", Division, etc. (use mask GLUPKY).

Org.Key: Numbers or characters, which stand for some used combination of values for the Organization (use mask GLUPKY).

Object Group: A code which groups like Object Codes into some client defined collection, such as all asset Object Codes or all Salary and Wages Object Codes. Object Groups may be set up for reporting and/or budget controls. (Use mask GLUPOB).

Object Code: A code, which represents an entry in a Chart of Accounts. Objects are typically used to classify line items in an accounting system, but they are also used to classify assets, liabilities, fund balances, and transfers in addition to revenues and expenditures. A unique Object is created for each bank account (assets), for each payroll retirement plan (liabilities), for each type of revenue generated, for each type of expense incurred, for each type of transfer in, and for each type of transfer out. Objects are generally the lowest level of classification, however, some organizations use the term Object to mean the lower level. (Use mask GLUPOB)

Control Key: An Org.Key, which has been defined at a higher level within the Chart of Accounts and typically identifies the accumulated sum of budgets for several lower level Org.Keys.

Fully Qualified Account: Input and Output formats, which require the entry of all clients, defined parts of the account structure. User defined exact account number requires numerous digits above the standard 10 characters for the ORG.KEY and 8 characters for the Object code. (Org. Parts plus the Object Code.) For example: “101200-6100” {10 = Fund, 1200= Accounting Dept.} this entire entry = the Org.key. [- dash is a separator] 6100 = Object Code. See General Ledger Section 1-17 to 1-24 for more detail.

Quick Key: From the GLUPQU mask you would enter a short number series which would allow entry of data from a decentralized point into the system in place of the full ORG.KEY and OBJ.KEY. (Example “305” for 1012005001) Part of original Set-up for General Ledger.

User Security: From the NUUPUS mask you would establish user security priority and that would screen the users read, write and access to information per sub-system.

System, Function, Criteria: These are the steps, which are performed when you enter a mask. You will tell which sub-system you want to access the function to perform in that system and the criteria for the data source.

Rollover: Special purpose programs are usually written to move data from one application system to another.

Concepts

Bid/Quote: System Requirements

- Ability to flag a purchase request as “QUOTE” or “BID” as needed
- To collect similar items off a purchase request and create a quote or bid
- Ability to record general and detailed information for quotes and bids
- Coded tables for:
 - Standard bid types
 - Org/Object codes
 - Buyers
 - Vendors
 - Departments
 - Organizations
 - Bid cycles/tasks
 - Performance data
- Ability to interface directly with PE, GL, PO, PR
- To create invitation lists for selected bidders
- To record contact names, notes, and status

- Automatic creation of a bid list based upon any combination of: commodity codes, product codes, or special selection criteria (i.e., by use of association values).
- Ability to capture and inquire upon vendor/bidder performance
- Ability to track days on different types of bids
- Formal note logs capture information related to verbal or written communication
- To issue bid documents to selected bidders
- To amend and log screen/data changes
- Perform user security at the menu/screen/field level **Note:** This requires security setup in Nucleus, and the TRIAD security.
- To be CDD(report writer) compliant
- Ability to interface with contract management and work order
- Ability to record miscellaneous comments
- Provide on-line query-by-example on all screens
- Ability to create purchase orders
- Ability to track bids by task (internal control look up screens)
- Ability to create multiple tasks within a bid/bid process
- Ability to create bids from forecasting results given bid history
- Ability to customize applications including: (some restrictions apply)
- Adding new fields/attributes
- Adding new screens
- Adding new reports/ADHOC/CDD
- Change default field values
- Change lookup selection criteria by user
- Security checking by field value

2.1.2 Intermediate

Under Construction

2.1.3 Advanced

Under Construction

2.1.4 Best Practices

Under Construction

2.2 Bid Online Setup

2.2.1 Basics

Under Construction

Terms and Definitions

Terminology

Bid/Quote (sometimes abbreviated as BQ) – The standard module of IFAS that supports the formal bid process. While the module provided features to track and evaluate bids, the advertising and data entry was done manually. Originally released as a Triad module in Classic, this module has been available in 7i as of 7.6.

Bid Online (sometimes abbreviated as BO) – An “add on” module to Bid/Quote that allows sites to advertise bids on a Web site as well as collect online bid responses directly from the vendors.

Bid – A collection of one or more items or services for which the site is required to obtain competitive pricing. Bids typically follow the rules of a “formal bid process” or “sealed bid process”.

Quote – A collection of one or more items or services for which the site is required to obtain a certain number of price quotes. These “informal quotes” are often obtained over the phone or email. Bid Online allows quotes to be submitted online.

Advertise Date – The date a bid is made available for public view.

Open Date – The date when the system starts allowing bid responses.

Close Date – The date when the system stops allowing bid responses.

Opening Date – The date when the system allows the IFAS user to decrypt and import the sealed bid responses.

Bidder – A person or company that provides good or services and interacts with the public Bid Online web pages. Bidder information is held in Bid Online only.

Vendor – A person or company with which the site does (or expects to do) business. Vendor information is held in the Person/Entity (PE) module of IFAS.

Publish – To send information from the IFAS system to the Bid Online server.

Response – The prices and other information provided by a bidder in regards to a specific bid.

Shipment – Bid response information that is physically sent from the bidder to the site.

Amendment – A change to a bid that has already been advertised to the public.

Commodity Code – A code from a standardized list used to identify the type of goods or services. Bid online supports the NIGP and UNSPSC commodity code sets.

Entity – An identifier assigned to a site or a portion of a site. One entity typically represents one or more IFAS database instances.

Question Set – A group of bid questions that can be assigned to a bid.

Bid Question – A question that is presented to the bidder as they respond to a bid.

Q&A – Questions asked by bidders and answered by buyers during the bid response period.

Concepts

System Requirements

To fully implement the Bid Online module, a site would need the following components:

IFAS 7i

Bid/Quote Management Module in 7i

Purchasing Module

Documents Online (for file attachment support)

IFAS Dashboard

Click, Drag, and Drill (CDD)

Workflow

Browser requirements for standard 7i screens:

Internet Explorer 6+ on Windows

Browser requirements for external (dashboard) web pages:

Internet Explorer 6+ on Windows

Firefox 1.5+ on Windows or Macintosh

Safari 1.2+ on Macintosh

Commodity Code requirements – the client must license one of the following supported commodity code sets:

5-Digit NIGP

8-Digit UNSPSC

IFAS Configuration

Define common code PEAS BOID

Record 2 of 3

Code Category: Code Value: Ledger:

Short Desc:

Medium Desc:

Long Desc:

<u>Associated Numeric Values</u>	<u>Associated Codes</u>	<u>Associated Descriptions</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

NUUPCD

Vendors from the IFAS system are linked to bidders from the Bid Online system through their tax ID and Bid Online Nucleus ID. Each PEID that is linked to a bidder will have a PE association code of “BOID” (Bid Online ID). Before any PE association code can be used, it must be defined in common codes under the PEAS category.

Create a new common code with category = PEAS and code value = BOID. If Bid Online will be used by all ledgers, then choose a ledger code of @@. The remaining fields are optional, but it is recommended that the medium description field explain the purpose of this PE association code.

Recommended Configuration: use a ledger code of @@ and set the medium description to “Bid Online ID”.

Define common code NUAS BQADMIN

Record 2 of 2

Code Category: Code Value: Ledger:

Short Desc:

Medium Desc:

Long Desc:

<u>Associated Numeric Values</u>	<u>Associated Codes</u>	<u>Associated Descriptions</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

NUUPCD

Only IFAS users who have been granted access will be able to use the Bid Online dashboard area. Access is granted by assigning a Nucleus association code of BQADMIN to each user on the NUUPUS screen. Before any Nucleus association code can be used, it must be defined in common codes under the NUAS category.

Create a new common code with category = NUAS and code value = BQADMIN. The ledger code should always be @@. Set the short description to IDENTITY (all upper case) and enter an appropriate explanation in the medium description field.

Recommended Configuration: use a ledger code of @@, a short description of IDENTITY, and a medium description of “Bid Online User”.

Define common code BQEN ENTITY

Record 1 of 1

Code Category: Code Value: Ledger:

Short Desc:

Medium Desc:

Long Desc:

<u>Associated Numeric Values</u>	<u>Associated Codes</u>	<u>Associated Descriptions</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

NUUPCD

When the IFAS server communicates with the Bid Online server it must identify the user’s assigned entity code. This is defined in common codes under a category of BQEN, code value ENTITY.

Create a new common code with a category of BQEN, code value ENTITY, and place the entity in the short description field. If this entity is specific to one ledger, then choose the appropriate ledger code. Otherwise, choose the @@ ledger. Place a meaningful description in the medium description field.

Recommended Configuration: use your SunGard Bi-Tech client ID as the entity code.

Assign BQADMIN association to Nucleus users

The screenshot shows a software interface with a top navigation bar containing icons and the text "Record 1 of 1". Below this is a tabbed interface with four tabs: "User Definition", "Job Class Definitions", "DB Class Definitions", and "TRIAD Definitions". The "User Definition" tab is active and contains the following fields:

- User ID: JEFF
- User Name: Jeff Meyers
- Description: 6 feet 2 inches
- E-Mail Address: jeff.meyers@bi-tech.com
- Location: ONSITE (dropdown menu)
- Manager: DBA (dropdown menu)
- Hours: @@ (dropdown menu)

Below the user definition fields are four more tabs: "Main", "Miscellaneous", "TRIAD Class Assignments", and "Associations". The "Associations" tab is active and displays a table with two columns: "Association Code" and "Value".

Association Code	Value
OUSD	@@
FINANCE	JEFF
XOPORTAL	JEFF
EXPENSE	JEFF
BQADMIN	JEFF

The "BQADMIN" row is highlighted in yellow. At the bottom of the interface, there is a status bar with navigation icons and the text "Record 5 of 5".

NUUPUS – associations tab

Each IFAS user that will be accessing the Bid Online dashboard area must be assigned an association code of BQADMIN. Typically this assignment is done only for buyers in the purchasing department, or other users who will administer bids published online.

After the NUAS BQADMIN common code has been defined, locate each user and create a new association record. Choose an association code of BQADMIN and enter their Nucleus ID in the value field.

Each IFAS user that is assigned the BQADMIN association must also be defined as a Nucleus user on the Bid Online server.

Define General Settings

Record 1 of 2

Entity: BSI Ledger: GL

Server URL: http://localhost/ifas7

Commodity Type: NIGP

Code Prefix: N

Misc Code: NIGP

PEID Seed: PEIDNUMS

Owner ID:

Bid Address Code: R1

Order Address Code: P1

Payment Address Code: R1

Phone Code: PR

Fax Code: FX

Created By: JEFF 2/8/2006 3:44:56 PM

Updated By: JEFF 4/6/2006 9:34:26 AM

BQUPON

The general configuration settings for the IFAS side of Bid Online are made through the BQUPON screen. One record should be created for each entity and ledger that will be communicating with the Bid Online server.

Entity: enter the entity code that was defined on the BQEN common code earlier .

Ledger: choose the actual ledger code that users will be signed into when working with Bid Online. A value of @@ does not apply here.

Server URL: Enter the base URL for the Bid Online server.

Commodity Type: Choose the type of commodity codes this entity/ledger will use. Current options are NIGP or UNSPSC. Note, this setting must correspond to the actual codes loaded in an upcoming step.

Code Prefix: When commodity codes are loaded into PE, you may choose to prefix them with up to 8 characters. This can be useful when the NIGP or UNSPSC codes overlap with existing codes.

Misc Code: You may choose to have the commodities identified by a miscellaneous code. If entered, the imported codes will be assigned this value.

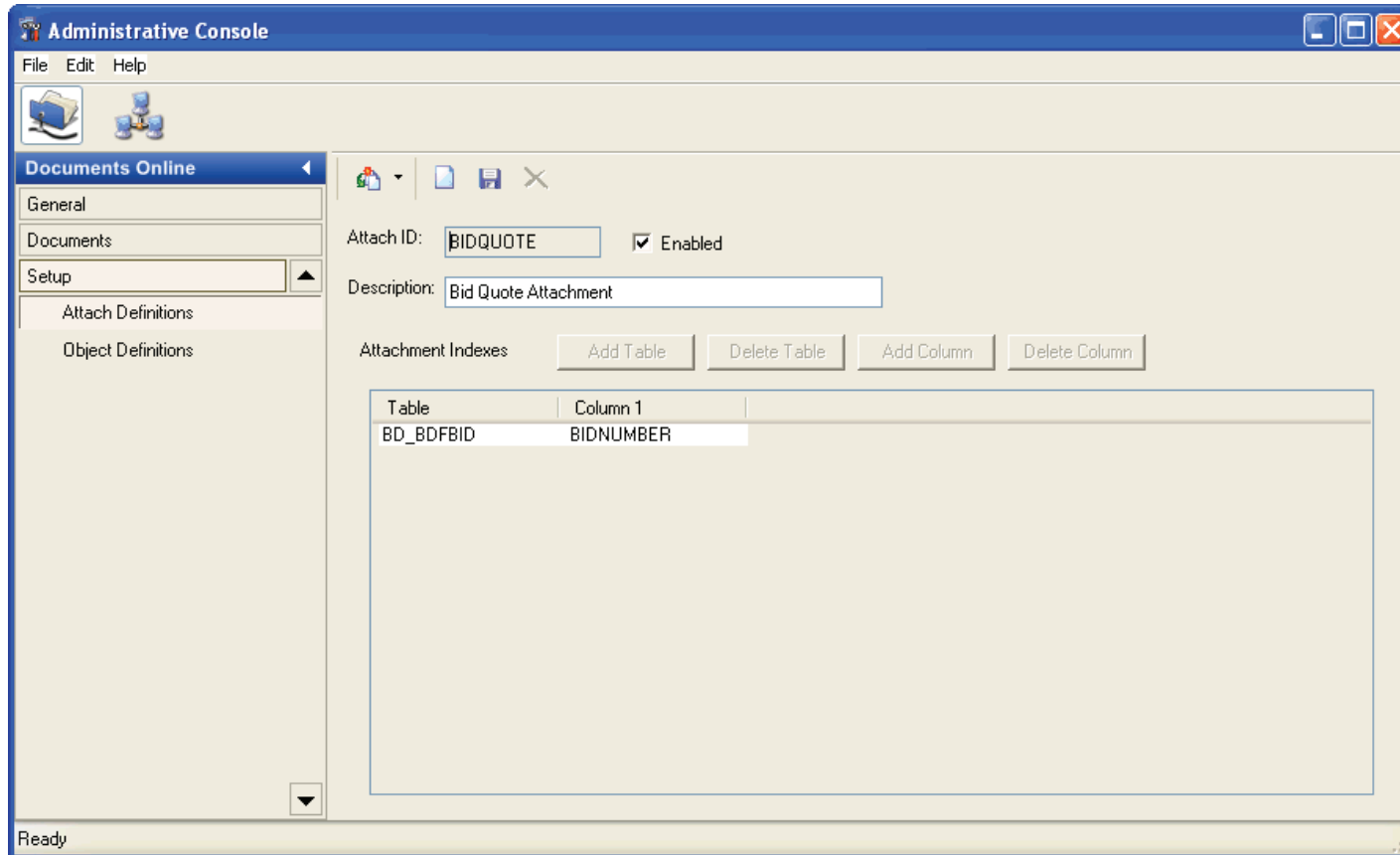
PEID Seed: enter the name of the system seed to be used when Bid Online creates PEIDs. If no seed name is entered here, then the system will not create PEIDs and bid responses from those vendors cannot be imported.

Owner ID: enter the owner ID code to be placed on PEIDs created by Bid Online.

Bid, Order, Payment Address Codes: choose the appropriate address code to be assigned to each address created by Bid Online.

Phone & Fax Codes: choose the appropriate phone codes to be assigned to each phone number when PEIDs are created by Bid Online.

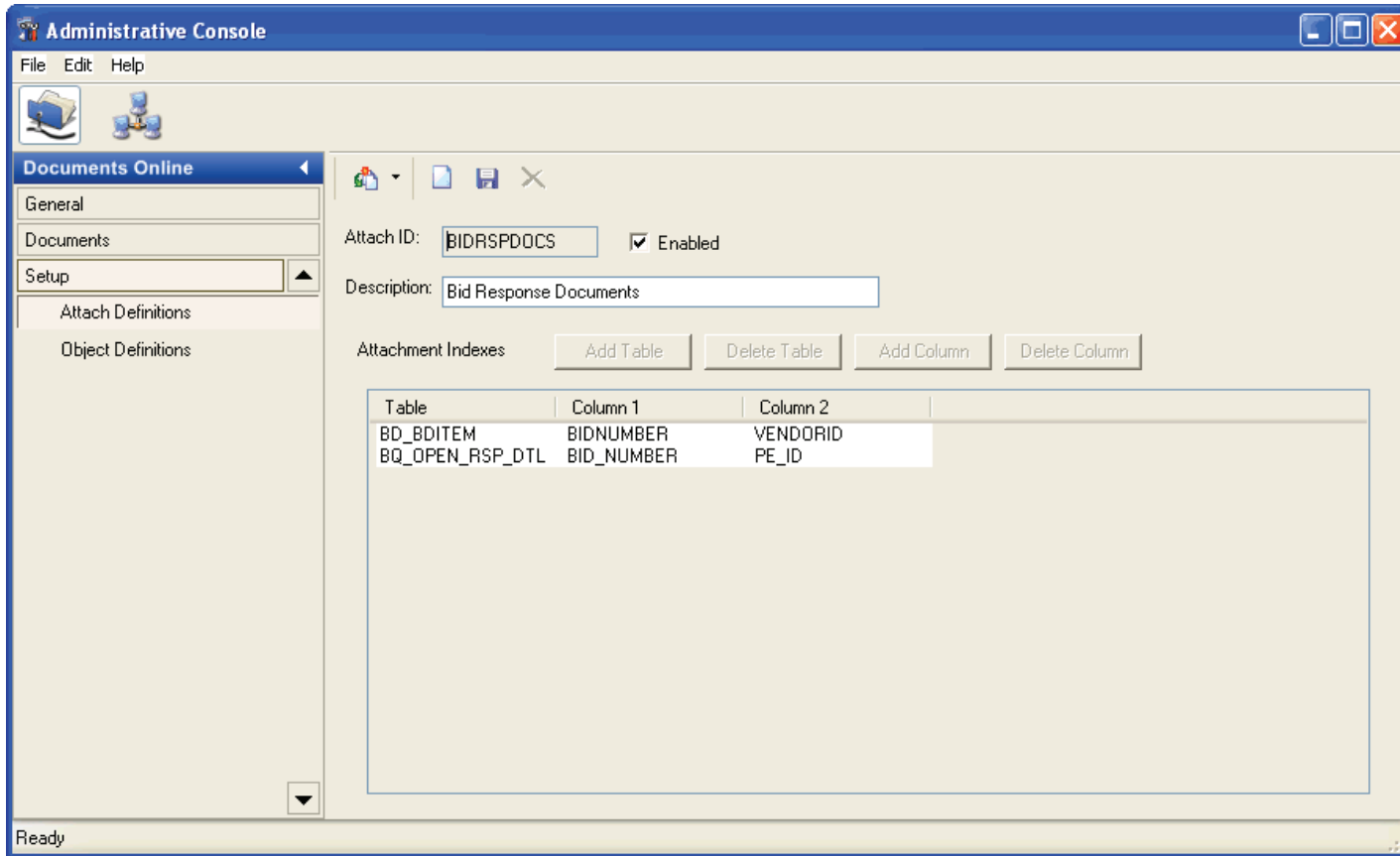
Create Attachment Definitions



Two attachment definitions are required on the IFAS server. Use the Administrative Console to create the Documents Online attachment definitions.

The first one is linked to table `BD_BDFBID` and tracks attachments to bids that will be published to Bid Online. For details about creating Documents Online attachment definitions, see the Documents Online user guide.

Bids in the IFAS Bid/Quote module are only tracked by bid number, so only one column need be defined: BIDNUMBER.

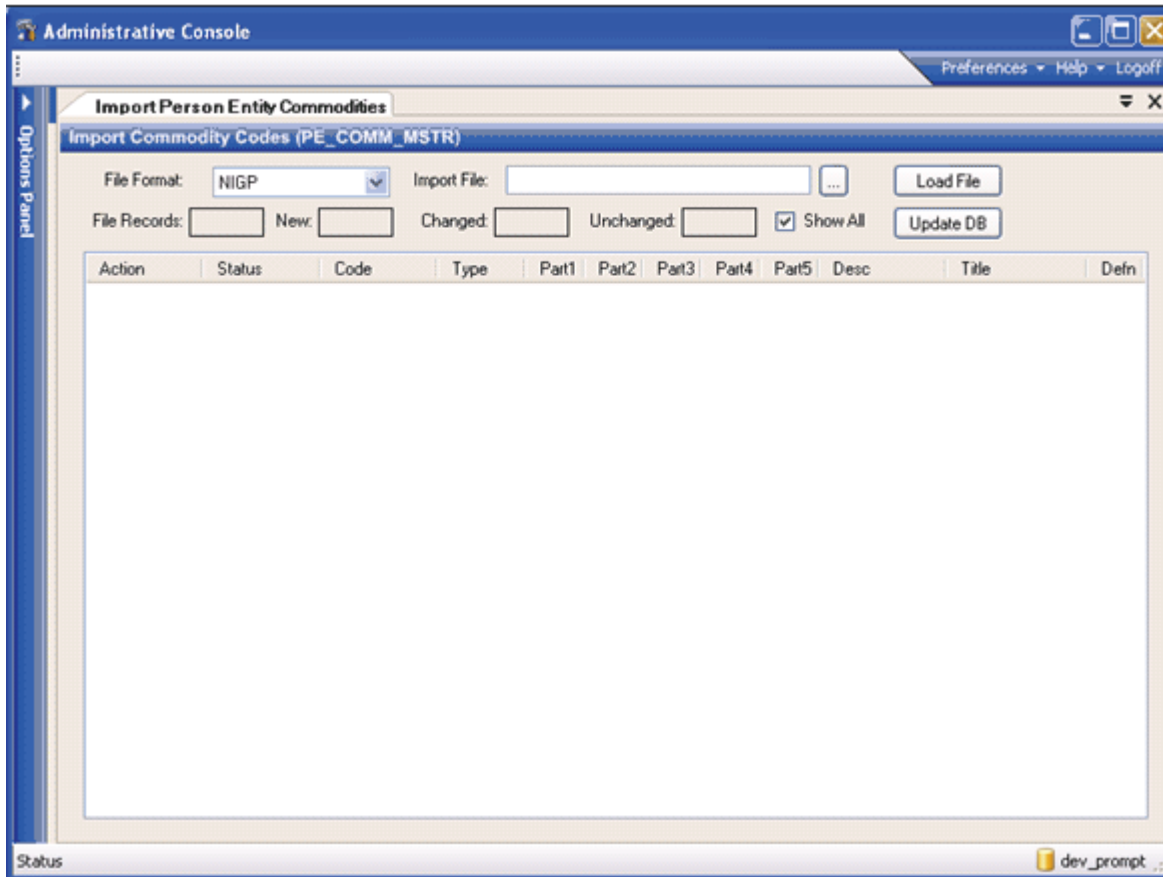


The second definition is linked to BD_BDITEM and BQ_OPEN_RSP_DTL and is used to track attachments provided by responding bidders. Bid responses are tracked by bid number and vendor ID, so two columns must be defined for each table.

BD_BDITEM is the standard Bid/Quote table where bid responses are stored. BQ_OPEN_RSP_DTL stores all of the answers from opened bids imported from Bid Online.

Load PE Commodity Codes

Each item that is placed on a bid must be identified by a commodity code. The commodity codes must be consistent between IFAS and Bid Online. Currently Bid Online supports two standard sets of commodities: 5-digit NIGP and UNSPSC.



Commodities are loaded into the PE_PROD_MSTR table of IFAS, which is the data accessed by the PEUPPR screen. To prevent the standard commodity codes from overlapping any existing codes defined in PEUPPR, you may choose to use a prefix for the commodity code. This is configured on the BQUPON screen.

Each commodity type is expected in a certain file format.

Run the Administrative Console and choose the “Database Admin” area. From the list on the left, choose “Import Person Entity Commodity Codes”.

To load a file, first enter the file path or click the adjacent button to browse. Choose either NIGP or UNSPSC file type. Click the “Load File” button to load the file contents into the console and compare the records with the database. Click the “Load Data” button to update the database.

Define Dashboard Favorite

From 7i “All” tab, create new public favorite.

Bid Online folder w/ 3 web link items:

Bid Questions: <http://%base%/BidOnline/BidQuote/BidQuestions.aspx>

Bid Summary: <http://%base%/BidOnline/BidQuote/BidSummary.aspx>

Bid Shipments: <http://%base%/BidOnline/BidQuote/BidShipments.aspx>

Bid Online Configuration
 Define common code NUAS BIDDER

Record 5 of 18

Code Category: Code Value: Ledger:
 Short Desc:
 Medium Desc:
 Long Desc:

<u>Associated Numeric Values</u>	<u>Associated Codes</u>	<u>Associated Descriptions</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

NUUPCD

To allow bidders access to the non-public portions of Bid Online, each bidder’s Nucleus ID will have an association assigned. While this assignment is done automatically as bidders register, you must still define the BIDDER association so the system knows it is a valid association code.

Create a new common code with category = NUAS, code value = BIDDER, ledger = @@, and short description = IDENTITY. Enter a meaningful explanation in the medium description. The remaining fields are not used.

Define Nucleus User Seed

Record 1 of 1

Code Category: Code Value: Ledger:

Short Desc:

Medium Desc:

Long Desc:

<u>Associated Numeric Values</u>	<u>Associated Codes</u>	<u>Associated Descriptions</u>
<input type="text" value="0.00013"/>	<input type="text" value="BQ"/> <input type="text" value="05"/>	<input type="text"/>
<input type="text" value="0.00013"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

NUUPCD

If a new seed is being used for the bidder IDs in Nucleus, create the corresponding common code. Create a new record with category = SYNO, code value = BIDDERID (or a name of your own choosing), ledger = @@. To define the format of the seed, enter an alpha prefix on the left side of code(1) and the number of digits on the right side of code(1).

The Nucleus Bidder ID is used only to link records on the Bid Online server, so the format is mostly irrelevant. Most important is that the format of the seed be different than other groups of Nucleus users on this server.

Create Nucleus Users

The screenshot shows a web-based user management interface. The top navigation bar includes 'User Definition', 'Job Class Definitions', 'DB Class Definitions', and 'TRIAD Definitions'. The 'User Definition' section contains the following fields:
 - User ID: JEFF
 - User Name: Jeff Meyers
 - Location: ONSITE
 - Description: 6 feet 2 inches
 - E-Mail Address: jeff.meyers@bi-tech.com
 - Manager: DBA
 - Hours: 00
 Below this, the 'Main' section includes:
 - Password Date: 04/14/2003
 - Status: [Dropdown]
 - Terminal Code: HP
 - Job Class 1: 00
 - Job Class 2: [Dropdown]
 The 'Miscellaneous' section includes:
 - Password Expiration: 0
 - Password Timeout: 0
 - Maximum Job Priority: 08
 - Terminal Timeout: 120
 The 'TRIAD Class Assignments' section includes:
 - Default Line PRI: 110L
 - Default Form PRI: 110
 - A table of printer assignments with columns for 'Line Printers', 'Max', 'Form Printers', and 'Max'.
 The 'Associations' section includes:
 - Priority: 8 (Default), 8 (Max)
 - Priority: 2 (Default), 8 (Max)
 - User Number: 1,735
 - Last Login Date: 04/18/2006

NUUPUS

Each user on the IFAS side that will be controlling Bid Online must be defined as a user on the Bid Online server. The user ID should match the BQADMIN association value assigned to them in IFAS. It is recommended that the user ID be the same for both IFAS and Bid Online. The Bid Online user should have full access in both Job Class and DB Class.

Define Entities

Entity: BSI Entity Name: Bi-Tech in Chico

Local Time Zone: PST Daylight Saving

Starting Instructions:

Ending Instructions:

BQBOEN

Each entity that will be communicating with the Bid Online server must be defined. Only entities defined here will be allowed to connect to the Bid Online server.

Entity: enter the entity ID as it was defined in the BQEN ENTITY common code(s) in IFAS.

Entity Name: enter the name of the entity. This name will be displayed to bidders in the public Bid Online area.

Local Time Zone: choose the appropriate time zone for the entity. This feature is reserved for future use.

Daylight Saving: if the entity observes daylight saving time, check the box. This feature is reserved for future use.

Starting Instructions: If the entity desires to have specific bid response instructions that appear at the beginning of the bid, enter them here.

Ending Instructions: If the entity desires to have specific bid response instructions that appear at the end of the bid, enter them here.

Define General Settings

The screenshot shows a web application interface for defining general settings. The top navigation bar contains icons for home, back, forward, and search, along with the text 'Record 1 of 1'. The main content area is a light gray form with the following fields:

- Entity:** A dropdown menu with 'BSI' selected.
- Ledger:** A text input field containing 'GL'.
- New Bidder Status:** A dropdown menu with 'AP' selected.
- Nucleus Seed:** A text input field containing 'BIDDERID'.
- Created By:** A text input field containing 'JEFF' and a timestamp '2/8/2006 2:27:31 PM'.
- Updated By:** A text input field containing 'JEFF' and a timestamp '2/17/2006 3:45:44 PM'.

On the left side of the form, there is a vertical sidebar with a '1' in a box and the text 'ENT BSI'.

BQBOGN

Some of the configuration settings used by the Bid Online server are defined on the general information screen. Create one record for each entity and ledger that will be connecting to the server.

Entity: choose the appropriate entity as defined in BQBOEN.

Ledger: choose the actual ledger users will be signed into when the work with Bid Online. @@ does not apply here.

New Bidder Status: when a bidder initially registers with the system, they will be assigned this status. If workflow has been configured to approve new bidders, then choose NW as the new bidder status. If new bidders are not being approved, then choose AP.

Nucleus Seed: enter the system seed that should be used for generating the Nucleus ID when a bidder registers. If you are creating a new seed, you must also define the corresponding SYNO common code (see next page).

Create Attachment Definitions

Administrative Console

File Edit Help

Documents Online

- General
- Documents
- Setup
- Attach Definitions
- Object Definitions

Attach Definitions

Attach ID: Enabled

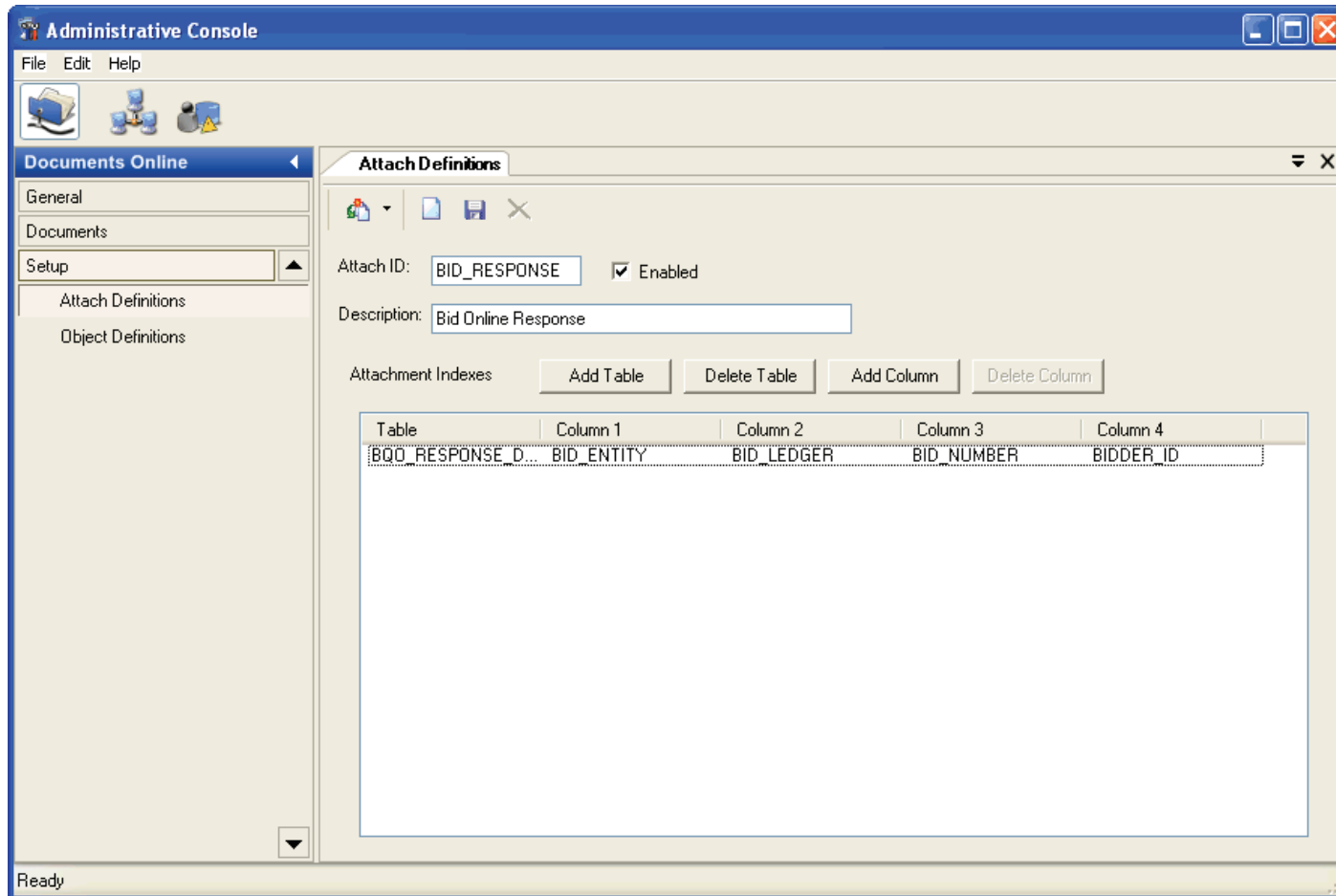
Description:

Attachment Indexes:

Table	Column 1	Column 2	Column 3
BID_ONLINE	BID_ENTITY	BID_LEDGER	BID_NUMBER

Ready

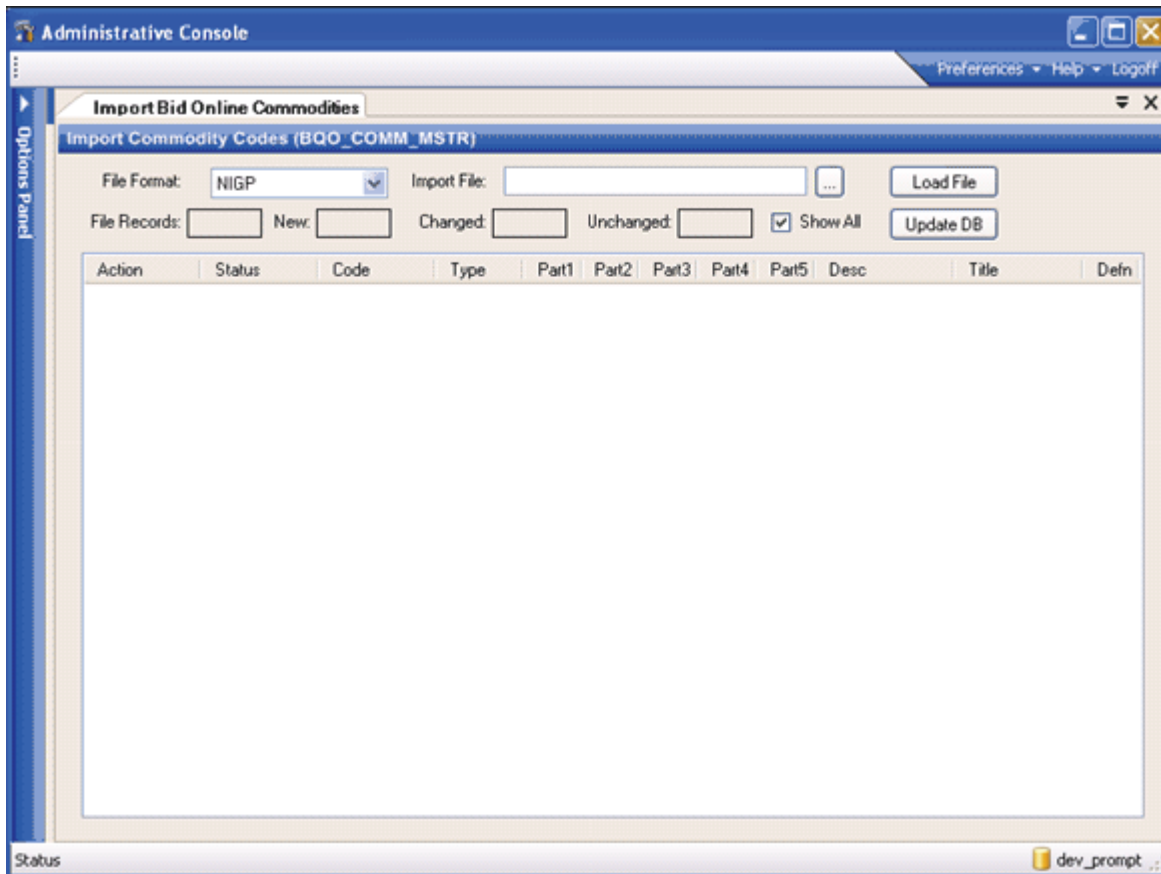
Attachments that are made available to bidders are linked to the BQO_BID_MSTR table. Using the Administrative Console, create an attachment definition for this table that uses three columns: BID_ENTITY, BID_LEDGER, and BID_NUMBER.



When a bidder's response includes attachments, they are linked to the BQO_RESPONSE_DTL table. Using the Administrative Console, create an attachment definition referencing three columns: BID_ENTITY, BID_LEDGER, and BID_NUMBER.

Load Bid Online Commodity Codes

Each item that is tracked by Bid Online is identified by a commodity code. The commodity codes must be consistent between IFAS and Bid Online. Currently Bid Online supports two standard sets of commodities: 5-digit NIGP and UNSPSC. Commodities are loaded into the BQO_COMM_MSTR table of Bid Online.

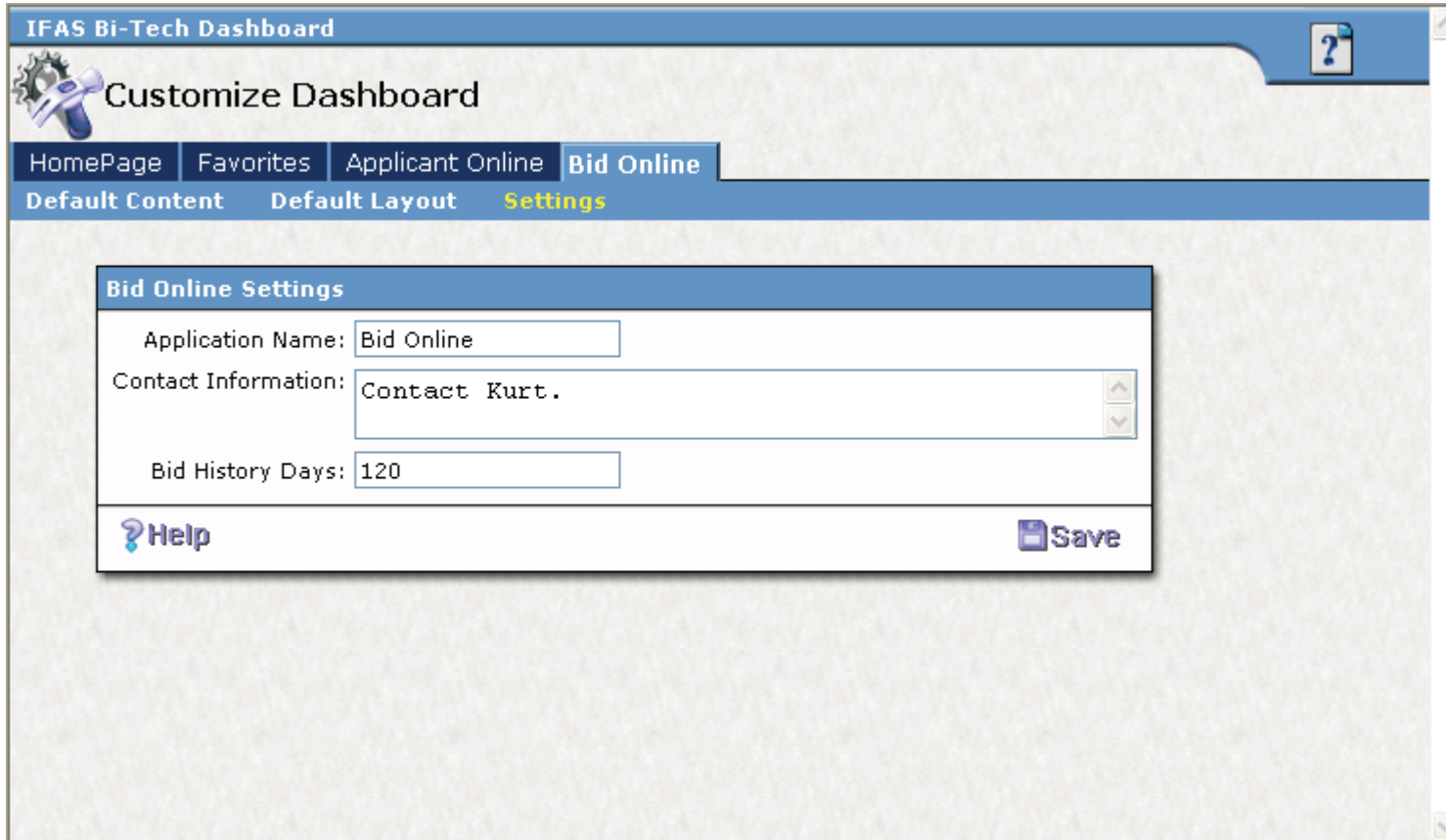


Each commodity type is expected in a certain file format. See appendix A for details on the file formats supported by this console plug-in.

Run the Administrative Console and choose the “Database Admin” area. From the list on the left, choose “Import Bid Online Commodity Codes”.

To load a file, first enter the file path or click the adjacent button to browse. Choose either NIGP or UNSPSC file type. Click the “Load File” button to load the file contents into the console and compare the records with the database. Click the “Load Data” button to update the database.

Configure Dashboard Settings



The screenshot shows the 'IFAS Bi-Tech Dashboard' with a 'Customize Dashboard' window open. The window has a blue header with a question mark icon. Below the header is a navigation bar with tabs: 'HomePage', 'Favorites', 'Applicant Online', and 'Bid Online'. Underneath the tabs are three sub-tabs: 'Default Content', 'Default Layout', and 'Settings'. The 'Settings' sub-tab is active, displaying the 'Bid Online Settings' form. The form contains three input fields: 'Application Name' with the value 'Bid Online', 'Contact Information' with the value 'Contact Kurt.', and 'Bid History Days' with the value '120'. At the bottom of the form are a 'Help' button with a question mark icon and a 'Save' button with a floppy disk icon.

There are a few configuration settings that apply to the Bid Online server in general (i.e. across all entities). These settings are made using the customization page for the Dashboard on the Bid Online server. The dashboard customization page is located at:

<http://<bid online server>/ifas7/home/customize>

Application Name: Enter the name of the application as seen from the public dashboard pages. Recommended value = Bid Online.

Contact Information: Enter the text to display to the bidder when they click the “Forgot Password” link. This is typically instructions on who to contact in case they cannot get logged in.

Bid History Days: enter the number of days to show closed bids. For example, when showing the list of recently awarded bids, only bids awarded in the last 120 days will be shown.

Connection Setting

If the Bid Online server has multiple connections defined, then a configuration setting is necessary. If only one connection is defined, then this setting is not necessary.

The connection setting is contained within a web.config file located in the ifas7\Services\BidOnline and ifas7/bidonline directories of the Bid Online server. An example of the file is shown below. Replace the string “your_connection” with your actual connection name.

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <configSections>
    <section name="Connections" type="System.Configuration.NameValueSectionHandler,System,Version=1.0.5000.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089"></section>
  </configSections>
  <appSettings>
    <add key="Connection" value="your_connection"/>
  </appSettings>
</configuration>
```

2.2.2 Intermediate

Under Construction

2.2.3 Advanced

Under Construction

2.2.4 Best Practices

Under Construction

3 Processes

3.1 3.1 Bid/Quote

3.1.1 Tutorial #1

Resetting the Seed Counter

When someone enters a number manually into the system and the system was set up for an automatic SEED number, you will have to reset the SEED counter:

Seed number out of sequence:

This fixes: Seed # in SYADVANC where the number is out of sequence. Example: #8 (an existing asset)

Option #1: Make the change through DBACCESS

From the UNIX Prompt:

Type dbaccess

Query Language is highlighted

Press Enter

You will be asked to select your database.

Use the down arrow until the correct database is highlighted. Hit enter

Then in the body of the screen enter:

Update sy_seedval_def

Set curr_val=<desired number> where cl_id="FAIDNT" and at_id="FAID" <enter>

<Where desired number is seed number, i.e., 98990014>

--Press the escape key then enter on Run.

This will re-set the seed value. Please call back if you have further problems on this incident.

Option #2: Make the change through Insight

If the staff is not familiar with DBACCESS you may go into Insight choose TDUPSV to change the SEED number. You will move to the Initial Value field, then use F2 to delete the current number and enter the correct number.

Option #3: Make the change through TRIAD Administration sysadvanc.

From the UNIX prompt:

Type syadvanc

The ARRAY screen will be displayed for you.

Press F4 for the list of screens

Use the down arrow to move to _SEED and hit enter

You will then be looking at the entry screen for Seed numbers by Cluster and Attribute

Press F7 for Browse

Use F6 to move through the screens until you get to Cluster: FAIDNT

Press F2 to delete the entry

Enter the same detail with the correct number in the initial entry field. Change the number to the next number for entry. (See screen shot below)

Be sure to recompile the subsystem.

From the UNIX prompt:

Type:

Synewmod woentry

(The information above is an example - you must know the name of your subsystem in order to complete the compile statement)

The common code must be setup to allow the QR in the requisition code section of the Purchasing screen. This feature will allow the Quote Screen to be used for a fast entry and connection to the Purchasing System:

Common Code PORC, Value QR, @@ , with the Medium Description of QR

The common code for Cat on the Purchase Request screen (POUPPR) needs to be changed to reflect a B for Bid/Quote Management association. The entry of a B in this area will allow a report to be pulled for all PR which were to be associated with the Bid/Quote

Management system. On the Bid/Quote Management side there should be an entry of the PR number on the BDFBID screen. This field would then be used for a cross reference on the report column of PR's with the B entry in Cat.

Note you must use a Purchase Request number with only six characters to make the system work. The other two characters are used for the extensions, which are necessary to attach the PR number to the various chosen Vendors.

The BID screen will not work if you do not go to the BDFBID screen and change the Status to Award. The program, which builds the transfer detail must be changed to reflect the correct coded value for the Award designation (Example: AW for awarded).

3.1.2 Tutorial #2

Under Construction

3.2 Bid Online Processes

3.2.1 Tutorial #1

Using Bid Online

Step 1: Create Purchase Requisition

PR: R83 682 PO: Status: PR Sec Cd: Aprv: Next:

Vendor	RemitTo	ShipTo	BillTo	Reqst'd	Aprv'd	Printed	Details	Blanket/Dates	Req. Codes	Misc.	
TBD TO BE DETERMINED			Addr: [v]	By: Jeff Meyers	Date: 04/11/2006 [v]		Confirm: [v] Account: [v] Bid #: [v] Contract #: [v] End Use: [v] Buyer: [v]			PO Type: P [v] Terms: [v]	
PO Total: \$0.00											

Items		Association Codes		Notes		
Item Numb	Quantity	Units	Description	Amount	Product Code	Warehouse
0001	50	EA	Pencils	0.00	N620-60	GL 101400-6000
0002	75	EA	Pens	0.00	N620-80	GL 101400-6000
0003	100	RM	Paper	0.00	N645-21	GL 101400-6000
0004	0			0.00		GL 101400-6000

Items Taxes Miscellaneous Account Distribution Item Shipping

POUPPR

Create a requisition using the purchase requisition entry screen, POUPPR. The vendor "TBD" has been chosen since the actual vendor will be awarded later. For each item, enter the quantity, unit of measure, description, and product code. Each item that will be included on the bid must have a commodity code assigned in the "Product Code" field. Make sure the commodity codes are from the standard NIGP or UNSPSC codes

supported by Bid Online. As with the vendor, the unit price is inconsequential at this point. Choose an appropriate account number for each item.

If multiple requisitions are entered and placed on the same bid, the items will be combined according to their commodity codes.

Step 2: Create Bid in BQ and assign to PR

Bid Number:	<input type="text" value="B6"/>	Short Desc:	<input type="text" value="Office Supply Sample"/>
Bid Type:	<input type="text"/>	Renewal Options:	
Buyer:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bid Dept:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bid Status:	<input type="text" value="OP"/> Open		
Description:	<input type="text" value="Office supplies needed for special project."/>		
Cycle ID:	<input type="text"/>	Bid Opening Time:	<input type="text"/>
Bid Open Date:	<input type="text"/>	Contract:	<input type="text"/>
Expire Date:	<input type="text"/>	Number of Bid Items:	<input type="text" value="0"/>
Court Date:	<input type="text"/>	# Bids Sent Out:	<input type="text" value="0"/>
Award Date:	<input type="text"/>	# Bid Responses:	<input type="text" value="0"/>
Delivery Date:	<input type="text"/>	Number Responsive:	<input type="text" value="0"/>
		% Returned:	
1st Adv Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>
		% Responsive:	

BQUPBD

The purchasing department reviews the requisitions and determines which items must go out to bid. Using the BQUPBD screen, the buyer creates a new bid in the Bid Quote module.

Enter a bid number, or use a system generated value. Enter the short and long descriptions as well as the required bid status. Other fields can be filled out, but are not necessary at this point.

Once the bid number has been established, the buyer then edits the requisitions and assigns the new bid number to each requisition.

PR: R83682 PO: Status: PR Sec Cd: Aprv: Next:

Vendor	RemitTo	ShipTo	BillTo	Reqst'd	Aprv'd	Printed	Details	Blanket/Dates	Req. Codes	Misc.
TBD TO BE DETERMINED	Addr:			By: Jeff Meyers			Confirm:			
				Date: 04/11/2006			Account:			
				PO Total: \$0.00			Bid #:	B6		PO Type: P
							Contract #:			Terms:
							End Use:			
							Buyer:			

Items		Association Codes		Notes		
Item Numb	Quantity	Units	Description	Amount	Product Code	Warehouse
0001	50	EA	Pencils	0.00	N620-60	GL 101400-6000
0002	75	EA	Pens	0.00	N620-80	GL 101400-6000
0003	100	RM	Paper	0.00	N645-21	GL 101400-6000
0004	0			0.00		GL -

POUPPR

As shown in the screen shot above, the bid number B6 has been assigned to requisition R83682.

Step 3: Add Bid Online Information

Bid Number:	B6	Ledger:	GL	Bid Dept:		Buyer:	JEFF	Bid Status:	OP
Short Desc:	Office Supply Sample			Commodity Code:	N620-00				
Advertise Date:	04/11/2006	Open Date:	04/11/2006	Close Date:	04/15/2006	Opening Date:	04/17/2006		

Bid Details	Quote Vendors	Bid Questions	Amendments	Additional Responses
<p>Starting Instructions: The following items are for use in a special project. is possible the winning bidder will be used for futur projects when similar items are needed.</p> <p>Ending Instructions: The formal bid opening will be Monday, April 17 at th purchasing office. Awards will be determined and post 12:00 noon on Tuesday, April 18.</p>				

BQUPBO

The buyer fills in the information needed by Bid Online using the BQUPBO screen. All four dates should be provided as these control how Bid Online interacts with the public and registered bidders. It is also required that the buyer provide an overall commodity code that represents the bid in general. In this example, N620-00 (Office Supplies) has been chosen.

Advertise Date	Date the bid is made available to the public on the web site
Open Date	Bid Online starts accepting responses
Close Date	Bid Online stops accepting responses

Opening Date	Bid can be decrypted and imported into Bid/Quote
--------------	--

The buyer has also entered some starting and ending instructions that are specific to this bid. This information will be presented to the bidder when they are responding online. There are entity-specific instructions defined elsewhere (BQBOEN) that can be more general in nature.

The next step is to assign the bid questions appropriate for this bid. This assignment is done on the “Bid Questions” tab of the BQUPBO screen. If no questions are defined or are appropriate, then new question sets can be defined on the BQUPQU screen shown below.

Step 4: Define Questions & Assign to Bid

Entity: <input type="text" value="SAMPLE"/>	Ledger: <input type="text" value="GL"/>	<input checked="" type="checkbox"/> Set is Active
Question Set: <input type="text" value="ITEM1"/>	Description: <input type="text" value="Basic item questions"/>	
Created By: <input type="text" value="JEFF"/>	<input type="text" value="4/11/2006 11:36:42 AM"/>	
Updated By: <input type="text" value="JEFF"/>	<input type="text" value="4/11/2006 11:36:42 AM"/>	
Question Order: <input type="text" value="1"/>	Short Description: <input type="text" value="Price"/>	
Question Text: <input type="text" value="Unit Price"/>		
Answer Type: <input type="text" value="N"/>	Answer Style: <input type="text" value="EDIT"/>	Answer Size: <input type="text" value="6.2"/>
<input checked="" type="checkbox"/> Answer Required		
Default Answer: <input type="text"/>		
Answer Options: <input type="text"/>		
BQ Attribute: <input type="text" value="Price"/>	Created By: <input type="text" value="JEFF"/>	<input type="text" value="4/11/2006 11:36:42 AM"/>
	Updated By: <input type="text" value="JEFF"/>	<input type="text" value="4/11/2006 11:36:42 AM"/>

Record 1 of 2

BQUPQU

Questions are grouped into question sets so they may be easily reused. Above an example is give where a question set called “ITEM1” is defined. This question set has two questions in it: price and comments. The screen shot above shows the first question definition. It has been defined as a numeric answer presented to the bidder as an edit box and allowing 6 digits to the left of the decimal and 2 to the right. It has also

been flagged as required, and the response will be placed into the “Price” field of the Bid Quote item record when the bid is opened and responses imported.

Entity:	SAMPLE	Ledger:	GL	<input checked="" type="checkbox"/> Set is Active
Question Set:	ITEM1	Description:	Basic item questions	
Created By:	JEFF	4/11/2006 11:36:42 AM		
Updated By:	JEFF	4/11/2006 11:36:42 AM		

Question Order:	2	Short Description:	Comment	
Question Text:	Comments			
Answer Type:	C	Answer Style:	EDIT	Answer Size: 50.0
Default Answer:		<input type="checkbox"/> Answer Required		
Answer Options:				
BQ Attribute:	Comm	Created By:	JEFF	4/11/2006 11:37:37 AM
Updated By:		JEFF	4/11/2006 11:37:37 AM	

BQUPQU

A second question is defined to gather optional comments. This answer has been defined as a character type, presented in an edit box with a length of 50. The answer will be placed into the “Comm” field on the Bid item record when the bid is opened and responses imported.

Bid Number: B6	Ledger: GL	Bid Dept:	Buyer: JEFF	Bid Status: OP
Short Desc: Office Supply Sample			Commodity Code: N620-00	
Advertise Date: 04/11/2006	Open Date: 04/11/2006	Close Date: 04/15/2006	Opening Date: 04/17/2006	

Bid Details		Quote Vendors	Bid Questions	Amendments	Additional Responses	
Question Level	Question Sort	Question Set	Created By	Create Date	Updated By	Upc
I	1	ITEM1	JEFF	4/11/2006 11:45:31 AM	JEFF	4/11/2006 1
	0					

BQUPBO

Now that suitable questions are defined, they can be assigned to the bid. Questions can be presented to the bidder once at the beginning (called “bid-level”) or repeated for each item (called “item-level”). In this example, only item-level questions are used.

On the “Bid Questions” tab of BQUPBO, choose a question level of “I” for item, enter a sorting value of “1”, and choose the appropriate question set – “ITEM1” in this example.

Step 5: Publish Bid

Record 6 of 6

Bid Number: B6

Short Desc: Office Supply Sample

Advertise Date: 04/11/2006

Ledger: GL

Commodity Code: N620-00

Open Date: 04/11/2006

Bid Dept:

Buyer: JEFF

Close Date: 04/15/2006

Bid Status: OP

Opening Date: 04/17/2006

Bid Details
Quote Vendors
Bid Questions
Amendments
Additional Responses

Starting Instructions: The following items are for use in a special project. is possible the winning bidder will be used for futur projects when similar items are needed.

Ending Instructions: The formal bid opening will be Monday, April 17 at th purchasing office. Awards will be determined and post 12:00 noon on Tuesday, April 18.

Reports
Entity List

BQUPBO

When the bid information is complete, it can be published to the Bid Online server. This is done using the appropriate tool from the option bar on the left of the screen. When the user clicks on the “Publish Bid” tool, the following window is presented:

Bid Online Tool -- Web Page Dialog

Please verify that the Bid Number below is correct and then click the "Publish" button to send it to Bid Online.

Bid Number:

Advertise Date: 4/11/2006

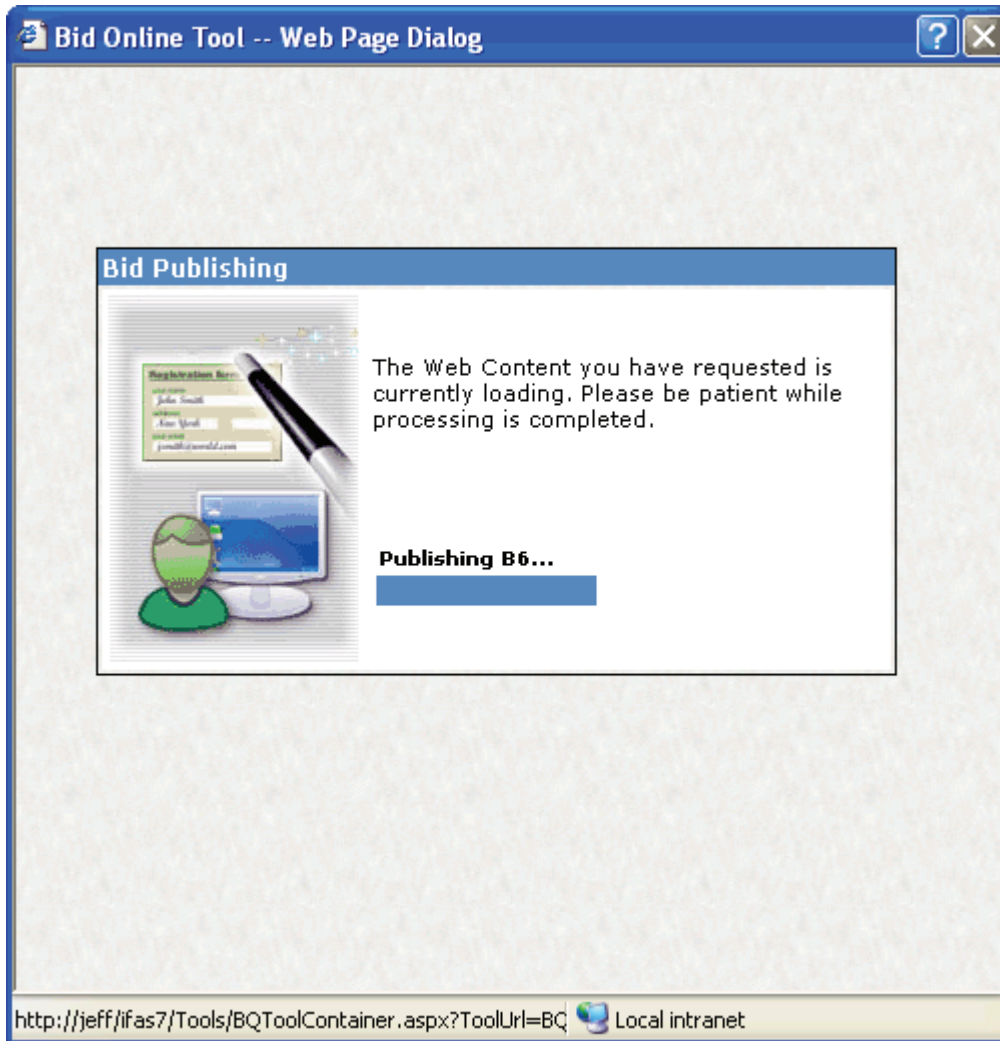
Allow Bid Attachments Post Award to Public

Allow Shipments

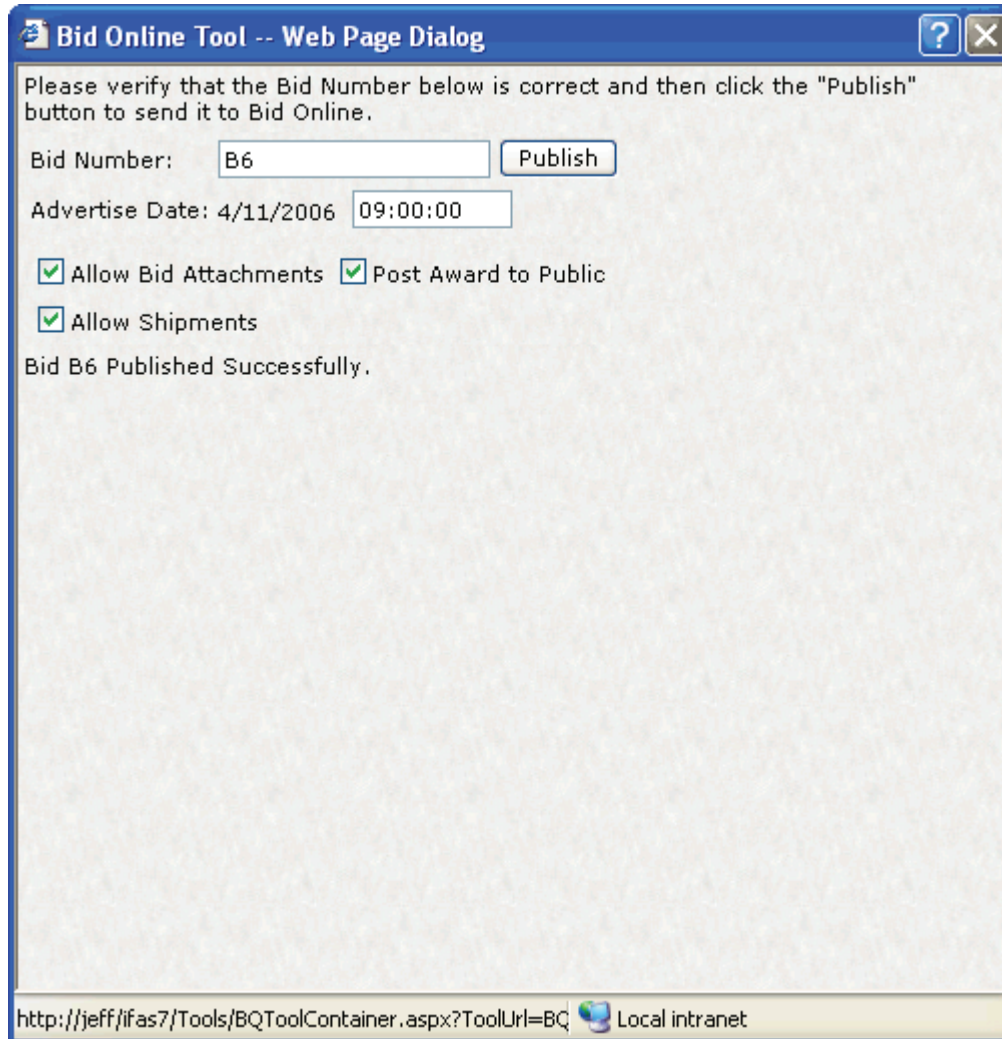
http://jeff/ifa7/Tools/BQToolContainer.aspx?ToolUrl=BQ Local intranet

This dialog window allows the buyer to verify the bid number to be published as well as specify a few details about how the bid will be handled.

Enter the time of day the bid will be advertised and check the boxes as appropriate. When the “Publish” button is clicked, the IFAS server gathers all of the bid data, pulls the item information from the requisitions, and sends it to the Bid Online server.

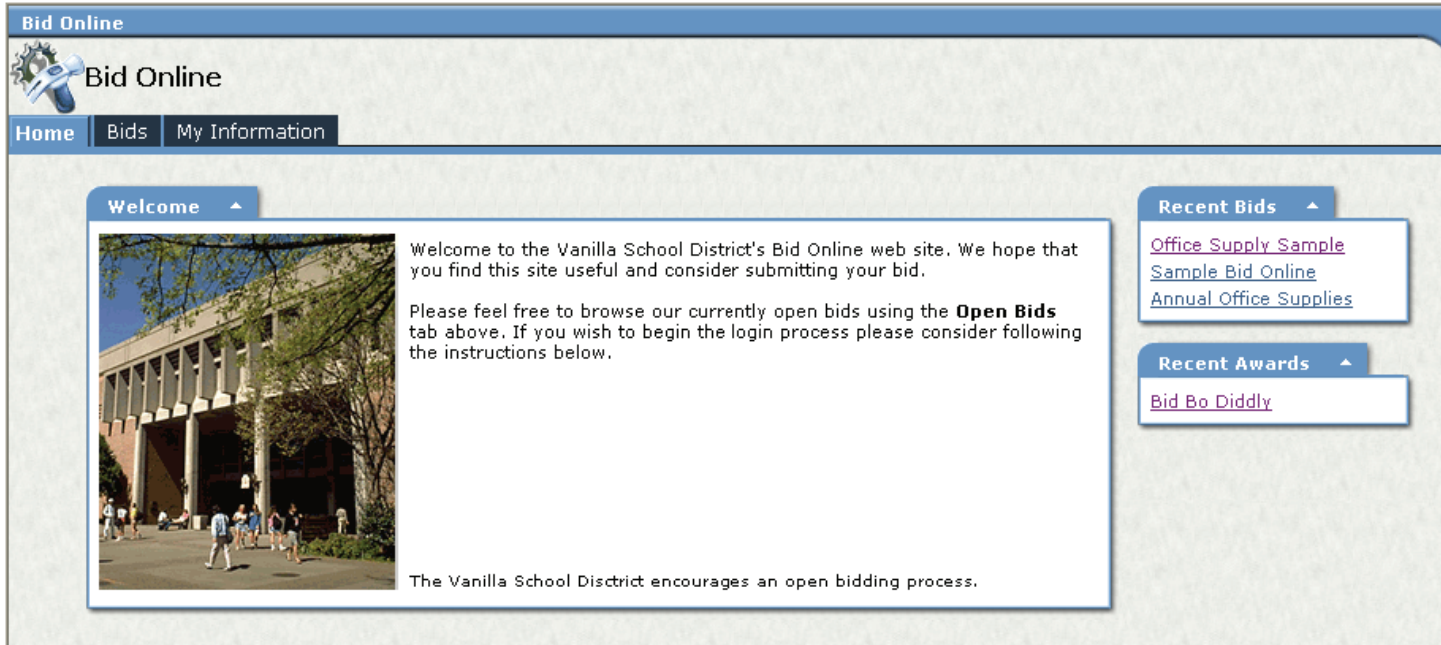


While the work is being done, the window shows a progress bar indicating the amount of work completed.



When the bid has been successfully published, the original window returns with an additional message indicating success. The window can now be closed by clicking on the "X" in the upper right corner.

When the advertise date/time has been reached, Workflow will update the status of the bid to make it visible to the public. Until then, it is only visible to IFAS users via 7i screens. If workflow is not configured to update the bid status automatically, you can change the status manually using the BQBOBD screen. Changing the status from PB to OP will make it accessible from the public web pages.



The screenshot displays the public interface of the Bid Online system. At the top, there is a blue header with the text 'Bid Online' and a navigation menu containing 'Home', 'Bids', and 'My Information'. Below the header, a 'Welcome' section on the left includes a photograph of a school building and a message: 'Welcome to the Vanilla School District's Bid Online web site. We hope that you find this site useful and consider submitting your bid. Please feel free to browse our currently open bids using the **Open Bids** tab above. If you wish to begin the login process please consider following the instructions below. The Vanilla School District encourages an open bidding process.' To the right of the welcome message are two sections: 'Recent Bids' with links for 'Office Supply Sample', 'Sample Bid Online', and 'Annual Office Supplies'; and 'Recent Awards' with a link for 'Bid Bo Diddly'.

The “public” view of Bid Online is accessed solely through a public web page. The address of the web page is http://<bid_online_server>/ifas7/BidOnline. When this page is accessed by internal IFAS users, it is necessary to start a new browser window as their identity in IFAS is not recognized by the Bid Online server.

When the public home page for Bid Online is accessed, it now shows a new bid in the “Recent Bids” section. Clicking on the bid title “Office Supply Sample” shows the details of the bid.

The screenshot shows the Bid Online web application interface. At the top, there is a navigation bar with 'Home', 'Bids', and 'My Information' tabs. The main content area displays the following information:

Office Supply Sample [? Help](#)

4/11/2006 - 4/15/2006
Bid Number: SAMPLE-GL-B6
Description: Office supplies needed for special project.

Bid Items

Commodity	Quantity	Description
620-60	50	Pencils
620-80	75	Pens
645-21	100	Paper

Attachments **Actions**
 User must be logged in to respond to this bid.

[Back](#)

In the above screen shot we see the dates the bid is open for responses, the bid number (a combination of the entity, ledger, and actual bid number) description, and list of items.

Step 6: Register as a Bidder

Before a public user can interact with a bid (e.g., submit a response), they must be a registered bidder.

To register as a bidder, click the “My Information” tab at the top of the public web page. This presents you with the following:


Bid Online

Home Bids **My Information** Profile Preferences My Bids ChangePassword

Bid Online Login


E-Mail:

Password:

 Login


[Forgot Login?](#)

[Create New Account](#)

 Help

If you have previously registered, you may log in using your email address and password. If this is your first time as a bidder, click the “Create New Account” link.

Bid Online



Bid Online

[Home](#) [Bids](#) [My Information](#)

[Profile](#) [Preferences](#) [My Bids](#) [ChangePassword](#)

Register as a New Bidder

Please enter your Company Name, Tax ID, Contact Name and E-Mail Address information in the form below and click the "Submit" button to create your login.

Company Name:

Taxpayer ID:

Taxpayer ID Social Security Number

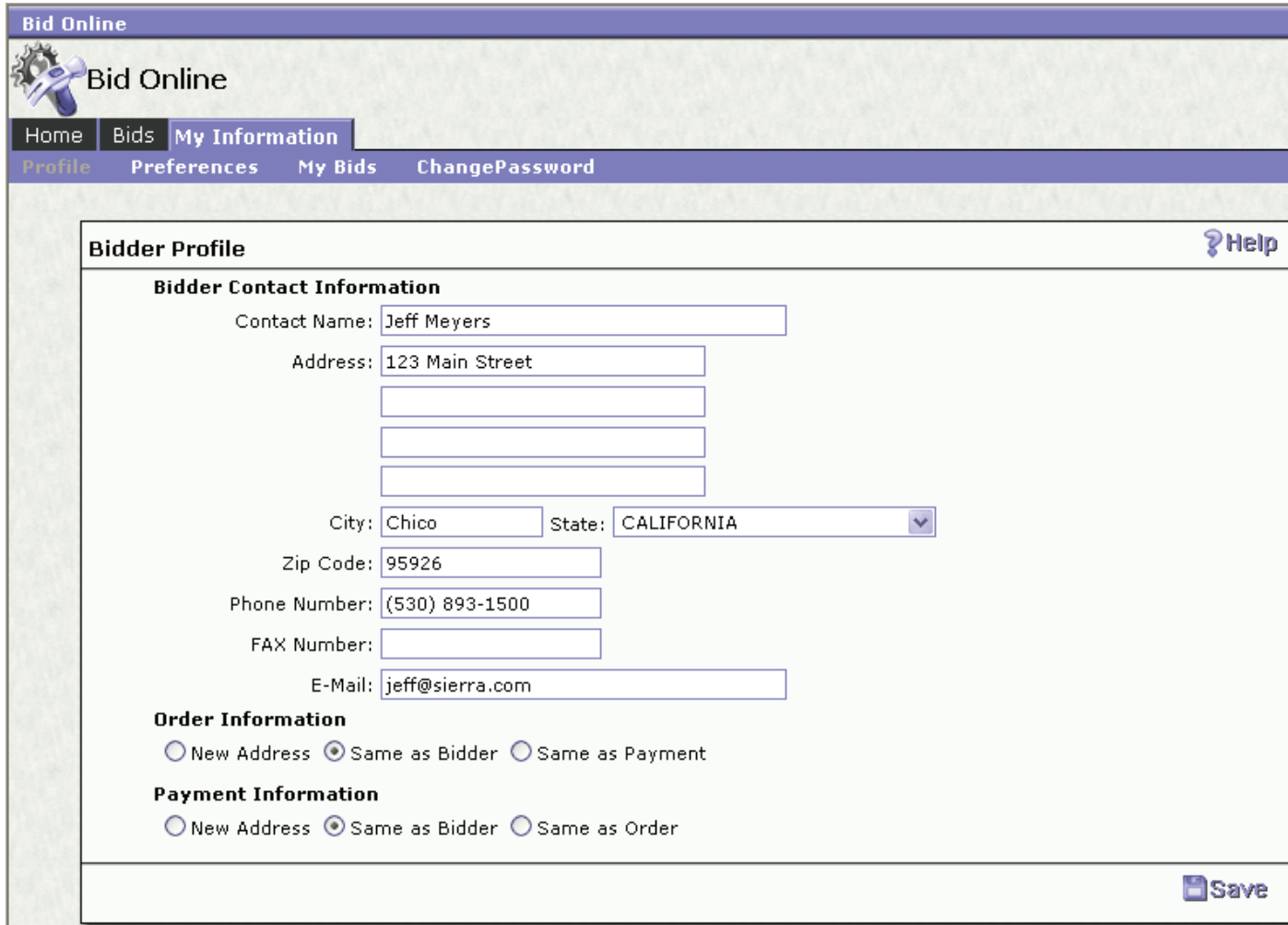
Contact Name:

E-Mail Address:

Password: Confirm:

[Back](#) [Help](#)

Fill in your company name, tax payer ID, contact name, email address, and password of your choice. Click the submit button to continue. The system will validate that the email address has not already registered and then take you to the Bidder Profile page where you can complete your contact information.



Bidder Profile [? Help](#)

Bidder Contact Information

Contact Name:

Address:

City: State:

Zip Code:

Phone Number:

FAX Number:

E-Mail:

Order Information

New Address Same as Bidder Same as Payment

Payment Information

New Address Same as Bidder Same as Order


Finish filling in the bidder contact information and click Save. You have now registered as a bidder and are able to respond to bids. If you would like to subscribe to various commodity codes for automatic notification of new bids, you can do so on the Preferences area of the My Information page. However, subscribing to commodities is not necessary for this example.

Step 7: Respond to Bid

Now when we return to the list of bid by clicking on the “Bids” tab, we see a complete list of open bids.

Open Bids		Bid Awards	
? Help			
Development			Sample IFAS Site
Bid	Description	Commodity	Bid Description Commodity
DEVGL-GL-B3	Annual Office Supplies	OFFICE SUPPLIES, GENERAL	SAMPLE-GL-B6 Office Supply Sample OFFICE SUPPLIES: ERASERS, INKS, LEADS, PENS,
DEVGL-GL-B4	Sample Bid Online	ABRASIVES	

To see the details of the new Sample bid, click on its link.



Bid Online

Home **Bids** My Information

Open Bids Bid Awards

Bid Information [? Help](#)

4/11/2006 - 4/15/2006
Bid Number: SAMPLE-GL-B6
Description: Office supplies needed for special project.

Bid Items

Commodity	Quantity	Description
620-60	50	Pencils
620-80	75	Pens
645-21	100	Paper

Attachments **Actions**

No Attachments [Respond To Bid](#)
 [Bid Attachments](#)
 [Bid Shipments](#)
 [Bid Q&A](#)
 Cancel Bid Response

[Back](#)

Now that we are logged in, the bid detail page shows the actions we can perform. Click the “Respond to Bid” link to begin a response. This will open a new window that will collect all of the answers for each item. This process starts on a page with instructions pulled from the entity definition as well as any bid-specific starting instructions.

Office Supply Sample 1 2 3 4 5

Thank you for responding to our bid. Please make sure you answer at least the required questions, which are indicated by **Bold Text**. You will be notified by email if there are any amendments.

The following items are for use in a special project. It is possible the winning bidder will be used for future projects when similar items are needed.

[Finish Later](#) [Next](#) ▶

Click “Next” to move forward to the next page.

Office Supply Sample 1 2 3 4 5

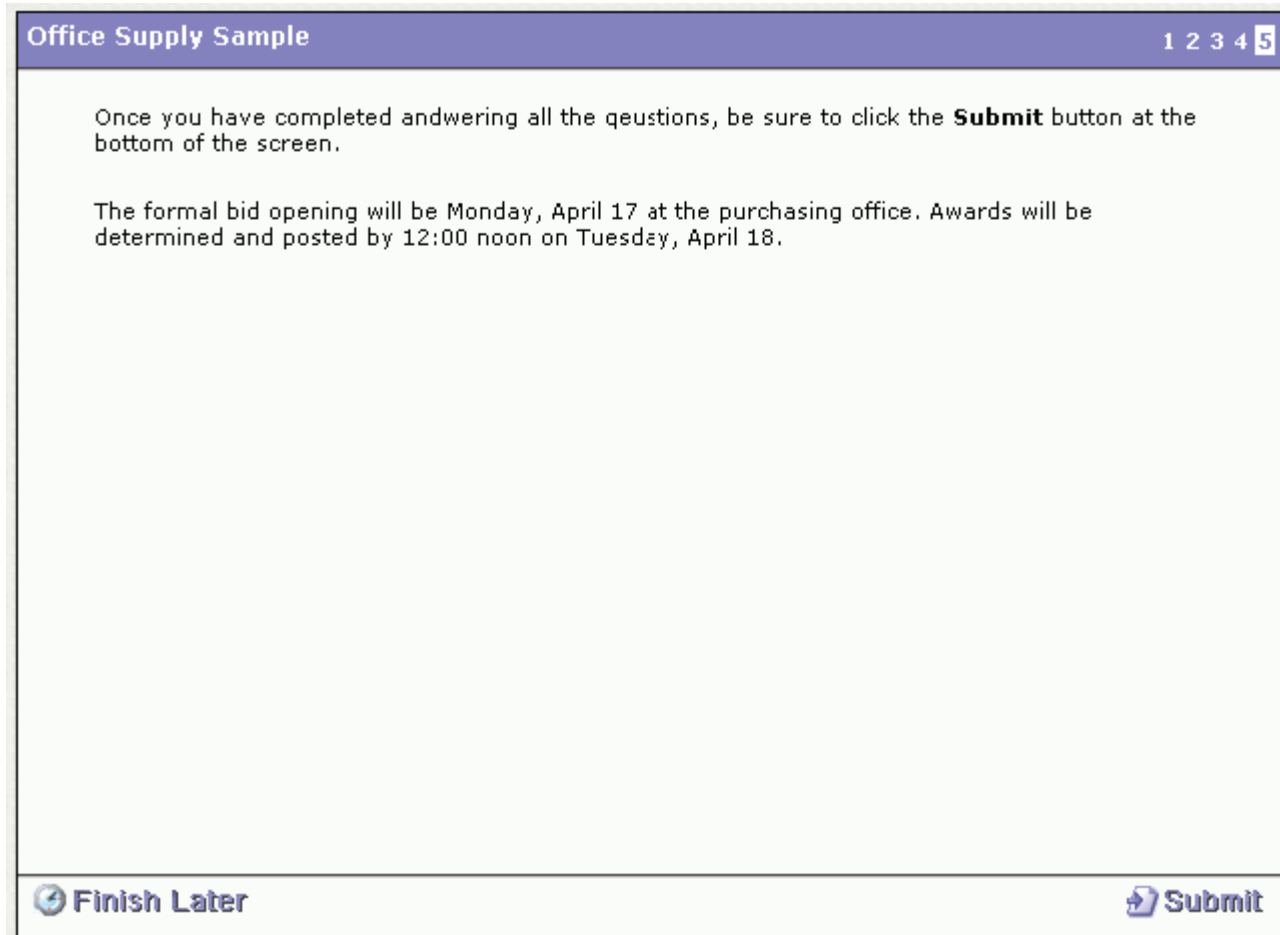
Item: Pencils
Quantity: 50 EA

Unit Price	<input type="text" value=".19"/>
Comments	<input type="text" value="#2, real wood"/>

[Finish Later](#) [Next ▶](#)

The question wizard will then step through each item, prompting for the item-level questions assigned to this bid. Fill in your answers and click Next, answering all of the questions for each item.

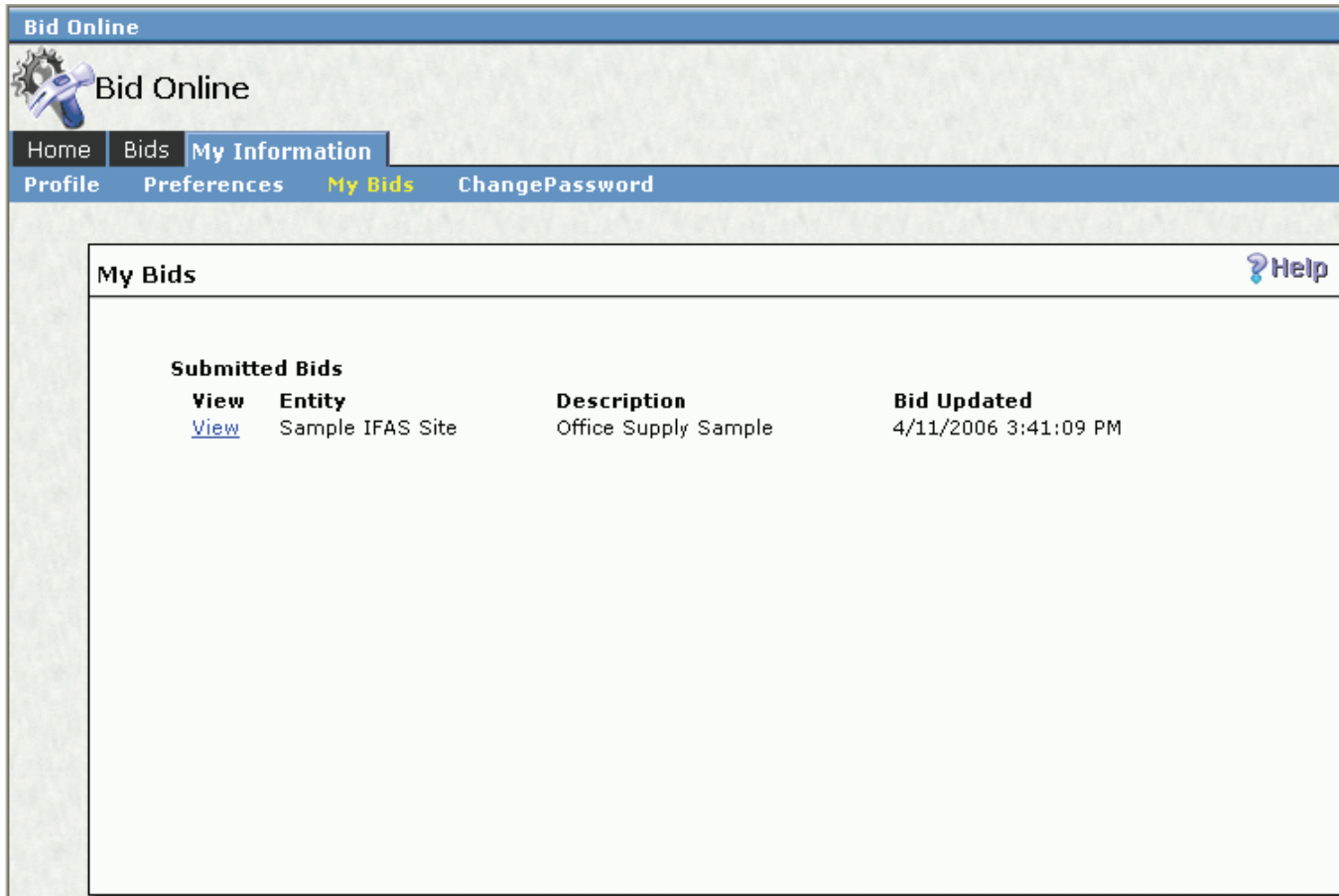
After all of the item questions have been answered, the bidder will see the final page of the questions. This page consists of entity and bid-specific ending instructions.



The screenshot shows a web-based bid submission interface. At the top, there is a purple header bar with the text "Office Supply Sample" on the left and a navigation menu "1 2 3 4 5" on the right, where the number "5" is highlighted. Below the header, the main content area is white and contains two paragraphs of text. The first paragraph reads: "Once you have completed answering all the questions, be sure to click the **Submit** button at the bottom of the screen." The second paragraph reads: "The formal bid opening will be Monday, April 17 at the purchasing office. Awards will be determined and posted by 12:00 noon on Tuesday, April 18." At the bottom of the window, there is a white bar with two buttons: "Finish Later" on the left and "Submit" on the right. The "Submit" button has a blue arrow icon pointing to the right.

Click the Submit button on the bottom-right of the window. This will save all responses and mark the bid response as submitted.

By clicking on the “My Information” tab and then “My Bids” link, the system will show the bidder all of their bids grouped by status.



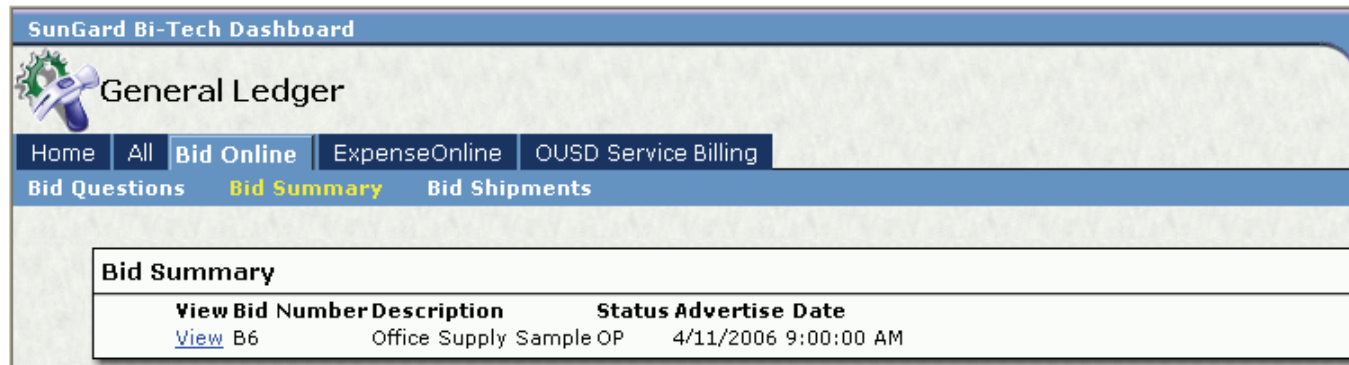
The screenshot shows the 'Bid Online' user interface. At the top, there is a navigation bar with tabs for 'Home', 'Bids', 'My Information', 'Profile', 'Preferences', 'My Bids', and 'ChangePassword'. The 'My Bids' tab is currently selected. Below the navigation bar, the page title is 'My Bids' with a 'Help' link. The main content area displays a table of 'Submitted Bids' with the following columns: 'View', 'Entity', 'Description', and 'Bid Updated'. A single bid is listed with the following details:

View	Entity	Description	Bid Updated
View	Sample IFAS Site	Office Supply Sample	4/11/2006 3:41:09 PM

The recently submitted bid may be viewed and changed at any time up to the closing date.

Step 8: Open Bid

In this simple example, the bidder is now done. The next step is opening the bid responses and awarding the bid to the best vendor. As the bids progress, however, the buyers may wish to view the Bid Online activity. This can be done through the Bid Online>Bid Summary section of the IFAS home page.




The screenshot displays the SunGard Bi-Tech Dashboard. At the top, there is a navigation bar with the following tabs: Home, All, Bid Online (selected), ExpenseOnline, and OUSD Service Billing. Below this, there are three sub-tabs: Bid Questions, Bid Summary (selected), and Bid Shipments. The main content area is titled "Bid Summary" and contains a table with the following data:

View Bid Number	Description	Status	Advertise Date
View B6	Office Supply Sample	OP	4/11/2006 9:00:00 AM

Clicking on the View link next to a bid will show the details of the selected bid.

SunGard Bi-Tech Dashboard

 General Ledger

Home All **Bid Online** ExpenseOnline OUSD Service Billing

Bid Questions Bid Summary Bid Shipments

Bid Status - Office Supply Sample

4/11/2006 - 4/15/2006
Bid Number: B6
Description: Office supplies needed for special project.

Bid Items

Commodity	Quantity	Description
620-60 - Pencils, Lead; Pencil Leads; Pencil Lengtheners;	50	Pencils
620-80 - Pens (General Writing Types): Ball Point, Nylon	75	Pens
645-21 - Bond Paper (Including Recycled)	100	Paper

Assignments

Bidder ID	Bidder Name	Contact

Responses

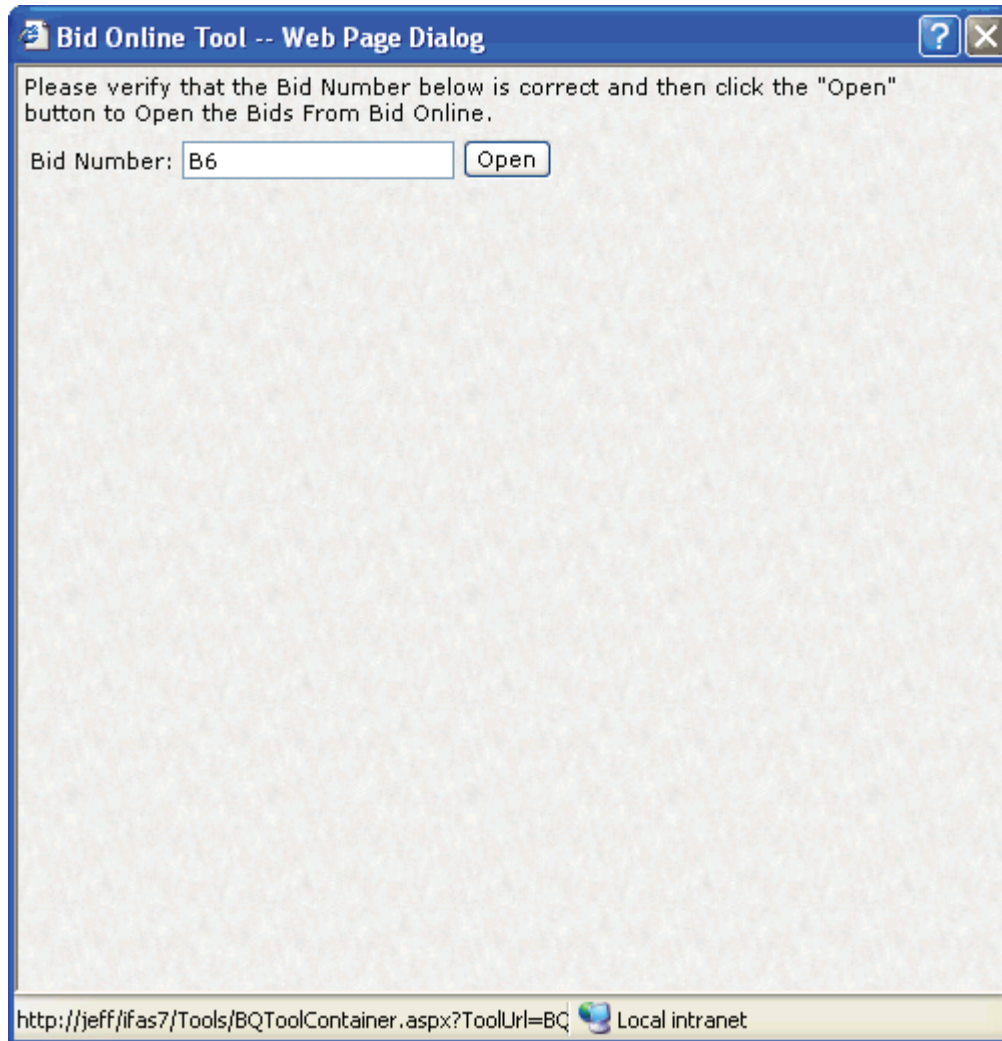
Bidder ID	Bidder Name	Contact	Status	Updated
BQ00014	Sierra Office Equipment and Supplies	Jeff Meyers	Submitted	4/11/2006 3:41:09 PM

[Back](#)

On this status page we see not only the bid item information, but also the bidder responses and their status.


When the bid opening date & time has come, the system will allow buyers to decrypt and import the Bid Online responses into the Bid Quote module. The act of opening an online bid is done through the tools section of the BQUPBO screen.

Click the “Open Bids” tool to initiate the opening process. The system will present a new window to confirm the bid number to be opened. To proceed, click the Open button.




Bid Online Tool -- Web Page Dialog
? X

Bid Publishing



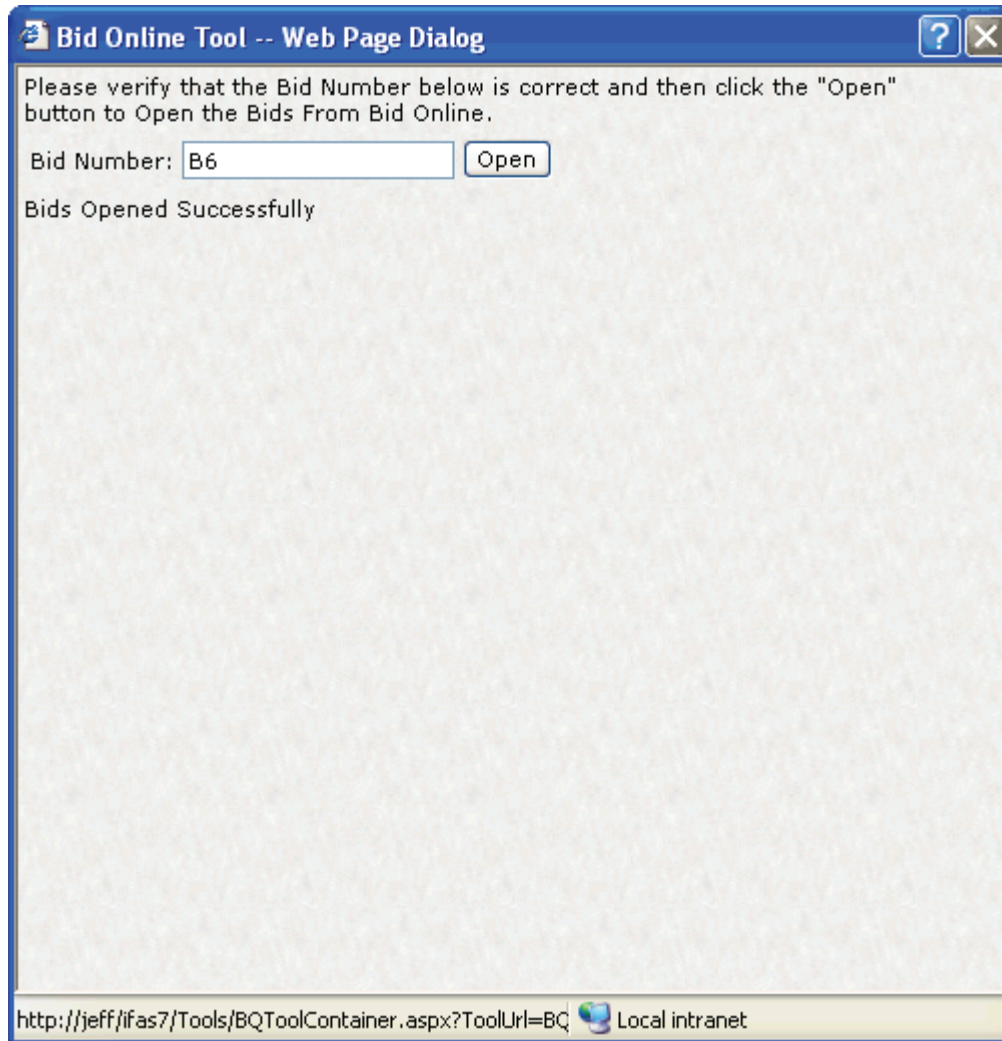
The Web Content you have requested is currently loading. Please be patient while processing is completed.



Creating Bidder BQ00014 - Sierra Office Equ

<http://jeff/ifa7/Tools/BQToolContainer.aspx?ToolUrl=BQ> Local intranet

During the progress of the opening, the system will show various status messages while it imports the data. When the import process is complete, the window returns with a successful status message.



The opening process performs the following actions:

Decrypt the bidder's response.

Import the response answers into the “Additional Responses” tab of the BQUPBO screen.

Import answers into the BQUPIT screen if the Bid/Quote module, if needed.

Locate matching PEID for the bidder. If not found, then create a PEID.

Import any attachments from the bidder and attach them to the bid response.

The screenshot shows the BQUPIT interface for Bid Number B6. The top navigation bar indicates 'Record 6 of 6'. The main form contains the following data:

- Bid Number:** B6
- Buyer:** JEFF (Jeff Meyers)
- Line Number:** 0001
- ID:** V008473 (Sierra Office Equipment and Supplies)
- Product Code:** N620-60
- Product Desc:** Pencils, Lead; Pencil Leads; P
- Price:** 0.19
- Quantity:** 50
- Units of Measure:** EA
- Terms:** (empty)
- Order Point Min:** (empty)
- Est Lead Time:** (empty)
- Comment:** #2, real wood
- Exempt:** (dropdown)
- Brand:** (dropdown)
- Vendor Item Code:** (empty)
- Awarded:** N
- Award Date:** (dropdown)
- Extended:** 0.00
- Good Thru Date:** (dropdown)
- Contact Name:** (empty)
- Order Point Max:** (empty)
- Qty in WHSE:** 0
- Running Total:** 0.00
- Response:**
- Meets Specs:**
- Haz Mat:**
- Alt Item Avail:**
- Grouped Item:**
- Time Line:**
- Fixed Asset:**

The bottom navigation bar indicates 'Record 1 of 3'.

BQUPIT

Above is an example showing one item that has been imported into the BQUPIT screen of Bid Quote.

The system also looks for a vendor in IFAS that matches each responding bidder. This matching is done through the tax ID and a PE association code of BOID. If a match is not found, then the system will create a new PEID. An example of the new PEID is shown below.

Record 1 of 1

PE ID: Name:

SSN: Create Date:

TIN: Salute Cd: Suffix: Due:

Owner ID: Nickname: Status: 1099 Flag:

RALT ID: Affiliation: Select 1: Select 2:

E-Mail Address:

Web URL:

Address Associations Text Customer Purchase

Code:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

City: St./Prov.: Zip: Country Code:

Phone Number 1:

Phone Number 2:

Phone Number 3:

Address Contact:

E-Mail Address:

Web URL:

Record 1 of 1

PEUPPE

Step 9: Publish Award

After the online bid has been opened, the buyers follow the normal procedure for evaluating and awarding the bid. Once the awards are done, the results can be published to Bid Online using the tool on the BQUPBO screen.

The screenshot displays the BQUPBO interface for a specific bid. The top navigation bar includes 'Links', 'Workflow', 'Attachments', and 'Tools'. The 'Tools for Bid Document' section on the left lists: Publish Bid, Publish Amendments, Open Bids, Award Bid, and Cancel Bid. The main content area shows bid details for Bid Number B6, Ledger GL, Bid Dept. (empty), Buyer JEFF, and Bid Status OP. The Short Desc is 'Office Supply Sample' and the Commodity Code is N620-00. Dates include Advertise Date (04/11/2006), Open Date (04/11/2006), Close Date (04/15/2006), and Opening Date (04/17/2006). Below these are tabs for Bid Details, Quote Vendors, Bid Questions, Amendments, and Additional Responses. The Bid Details tab is active, showing Starting Instructions and Ending Instructions in text boxes.

Record 6 of 6

Bid Number: B6 Ledger: GL Bid Dept: Buyer: JEFF Bid Status: OP

Short Desc: Office Supply Sample Commodity Code: N620-00

Advertise Date: 04/11/2006 Open Date: 04/11/2006 Close Date: 04/15/2006 Opening Date: 04/17/2006

Bid Details Quote Vendors Bid Questions Amendments Additional Responses

Starting Instructions: The following items are for use in a special project. is possible the winning bidder will be used for futur projects when similar items are needed.

Ending Instructions: The formal bid opening will be Monday, April 17 at th purchasing office. Awards will be determined and post 12:00 noon on Tuesday, April 18.

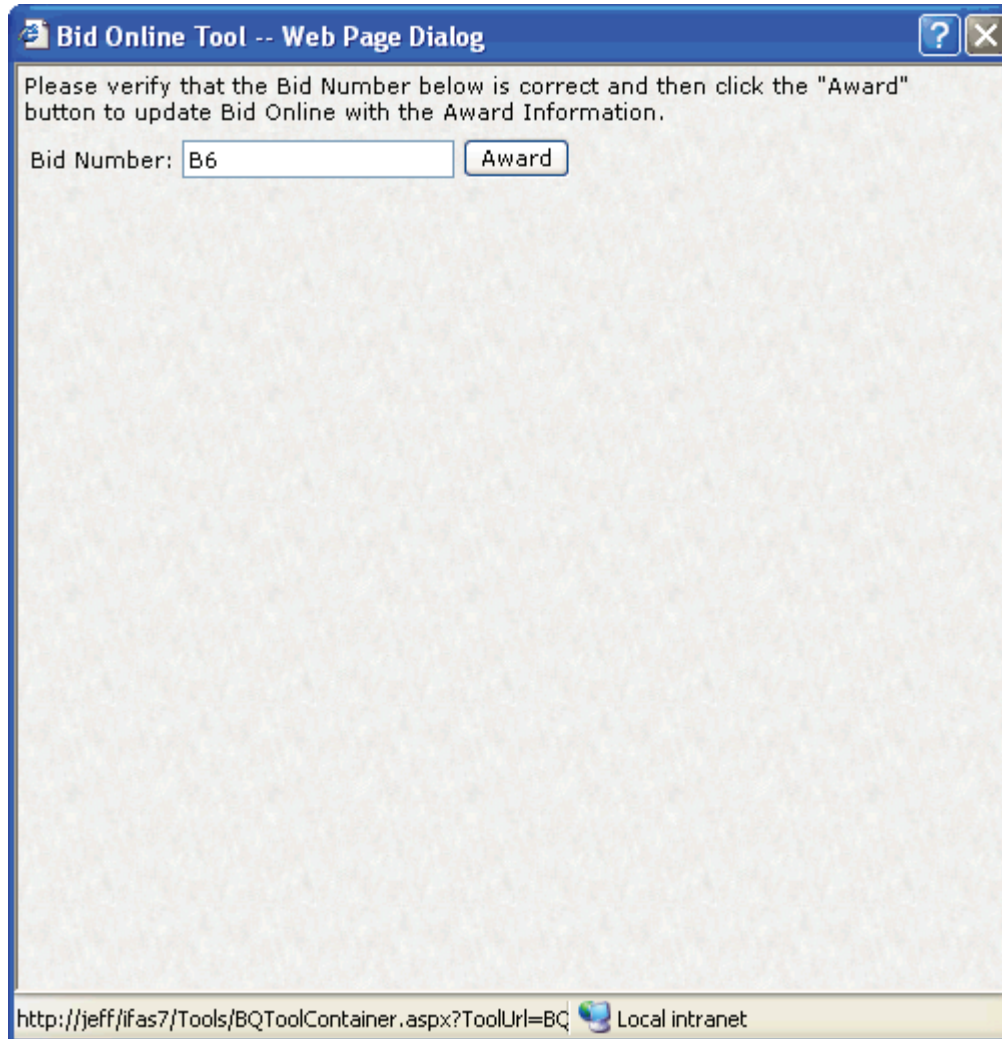
Reports

6 Entity List

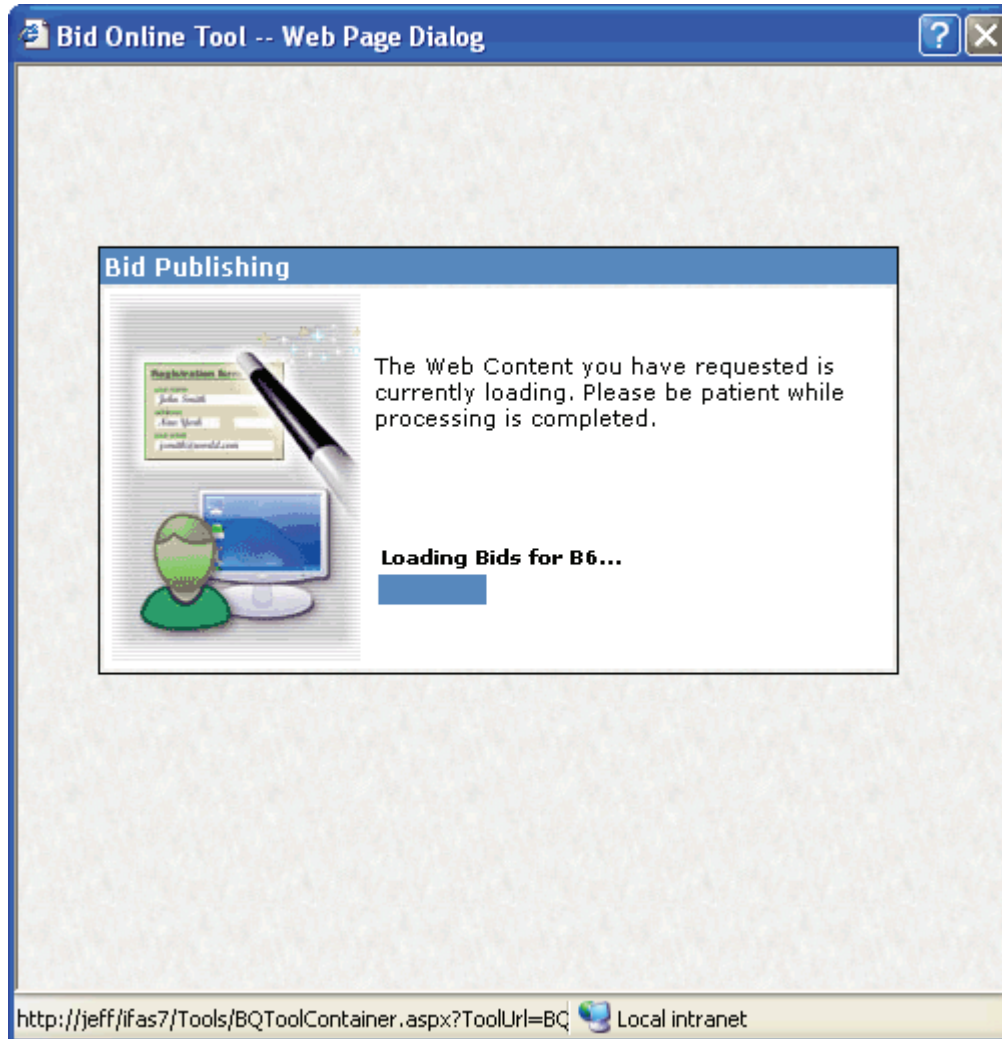
BQUPBO

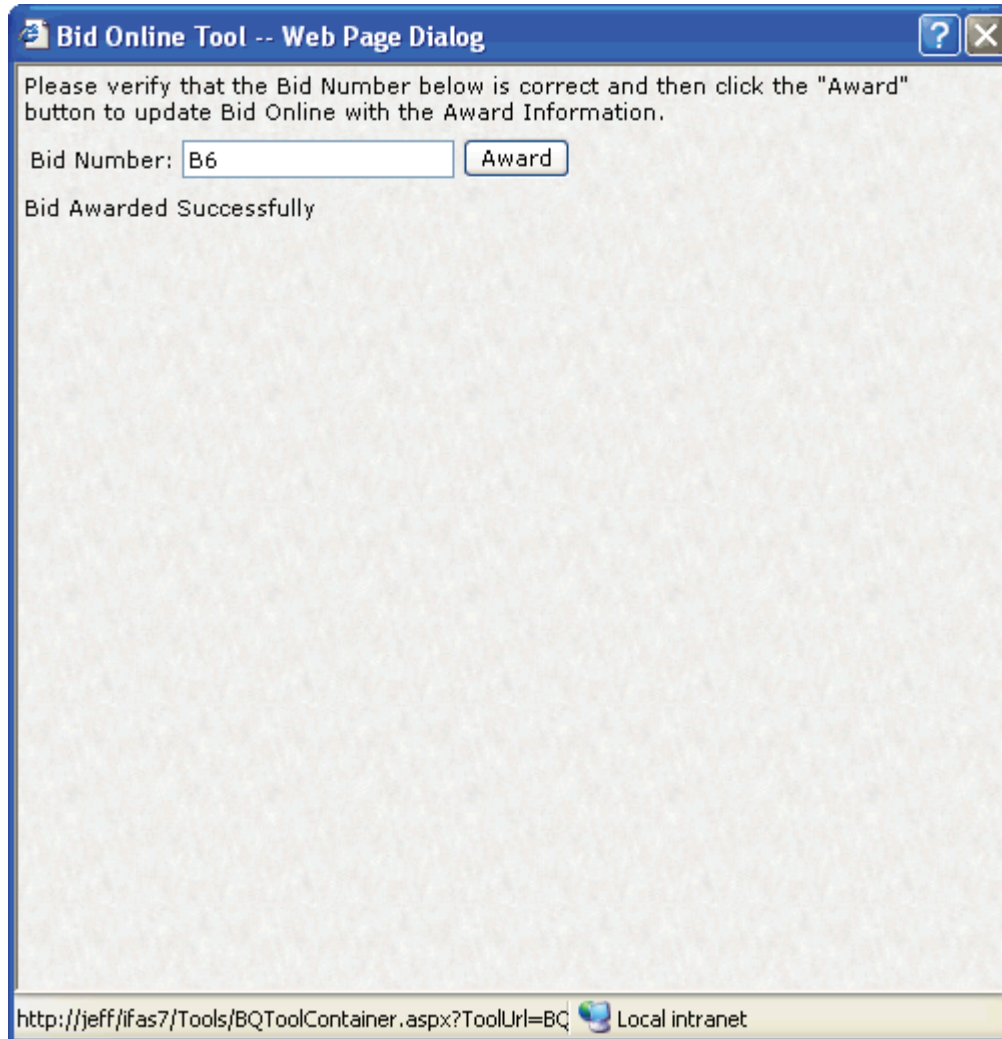
To publish award results to the web site, click the “Publish Awards” tool in the option bar of BQUPBO.

The system will present a new window to confirm the bid number to process:



Verify the bid number is correct and click the “Award” button. The system will show its progress as it does the work.





When the award information has been successfully published, the original window will return with a success message.

From the public Bid Online pages, the bid now appears in the “Recent Awards” list as shown below:

The screenshot displays the Vanilla School District's Bid Online website. At the top, there is a navigation bar with the text "Bid Online" and a logo. Below this is a secondary navigation bar with tabs for "Home", "Bids", and "My Information". The main content area is divided into several sections:

- Welcome:** A section on the left featuring a photograph of a school building and a welcome message: "Welcome to the Vanilla School District's Bid Online web site. We hope that you find this site useful and consider submitting your bid." Below the photo, it says: "Please feel free to browse our currently open bids using the **Open Bids** tab above. If you wish to begin the login process please consider following the instructions below." At the bottom of this section, it states: "The Vanilla School District encourages an open bidding process."
- Recent Bids:** A section on the right with a dropdown arrow, containing two links: "Sample Bid Online" and "Annual Office Supplies".
- Recent Awards:** A section on the right with a dropdown arrow, containing two links: "Office Supply Sample" and "Bid Bo Diddly".

Click the bid name in the Recent Award section to see the details.

The screenshot shows a web browser window titled 'Bid Online'. The page has a navigation bar with 'Home', 'Bids', and 'My Information' tabs. The main content area displays the following information:

Office Supply Sample [Help](#)

Bid Awarded on: 4/12/2006
Bid Number: SAMPLE-GL-B6
Description: Office supplies needed for special project.

Bid Items

Commodity	Quantity	Description
620-60	50	Pencils
620-80	75	Pens
645-21	100	Paper

Commodity	Quantity	Unit	Price	Vendor
620-60	50	EA	0.19	Sierra Office Equipment and Supplies
620-80	75	EA	0.79	Sierra Office Equipment and Supplies
645-21	100	RM	2.99	Sierra Office Equipment and Supplies

[Back](#)

The bid details page reviews the items on the bid as well as listing each item and its awarded price and vendor.

3.2.2 Tutorial #2

Under Construction

4 Process Reference

4.1 Bid/Quote Process Reference

4.1.1 Entry

Bid Management Screens

Screens Contained in the Bid Management Module

BID MANAGEMENT	
BQBOBD	
BQBOBR	
BQBOCD	
BQBOEN	
BQBOGN	
BQBOLG	
BQUPBD	
BQUPBO	
BQUPBP	
BQUPCD	
BQUPCY	
BQUPGN	
BQUII2	
BQUIIT	
BQUPLS	
BQUPON	
BQUPPR	
BQUPQU	
BQUPTD	
BQUPVQ	

Note: If the common code BMSL/TRIAD has been set up in Nucleus, the bid number, entered on the POUPPR screen in the Purchasing subsystem, will validate against the Bid Management system. Please refer to the Purchasing section of the Common Code Reference Manual.

Bid Definition Screen (BQUPBD)

The primary purpose of this screen is to capture the general or summary information related to a specific formal bid. One of these screens will be completed for each bid, so each site will have numerous occurrences of this screen. The overall flow of the bid being defined is controlled by the bid cycle entered on this screen.

The detailed description and the buyer associated to the bid will be entered on this screen. If the bid has any associated entries on the "Formal Bid Note Log" screen, you will see a system inserted "Y" in the "Note Log Entries" field. Other general information captured on this screen includes the current status of the particular bid, the original issue date or mailing date of the formal bid, the actual award date, and the date the

bid item was actually received by the site. If multiple items are contained on the bid, then the award date and delivery date will represent the dates associated with the last item on the bid.

On this screen, you will also insert the total number of items included on the bid and the total number of bids sent out to vendors. Upon entry of the actual bid item details, you will also insert the total number of bid responses, the percentage of bids that were returned as compared to the number that were sent out, and finally, the calculated percentage of the number of bids that were both returned and responsive.

Bid Number: <input type="text"/>	Entity: <input type="text"/>	Ledger: <input type="text"/>	Type: <input type="text" value="B"/>	Status: <input type="text" value="OP"/>
Description: <input type="text"/>		Contact User: <input type="text"/>		
Advertise Date: <input type="text"/>	<input checked="" type="checkbox"/> Allow Bid Attachments			
Open Date: <input type="text"/>	<input checked="" type="checkbox"/> Allow Shipments	Decrypted By: <input type="text"/>		
Close Date: <input type="text"/>	<input checked="" type="checkbox"/> Post Award to Public	Created By: <input type="text"/>		
Opening Date: <input type="text"/>		Updated By: <input type="text"/>		

Shipments	Questions and Answers	Assignments	Amend Acknowledgements
------------------	-----------------------	-------------	------------------------

Bidder ID: <input type="text"/>	<input type="text"/>	Shipment Number: <input type="text"/>
Shipped Via: <input type="text"/>	Tracking Number: <input type="text"/>	
Date Shipped: <input type="text"/>	Estimated Arrival Date: <input type="text"/>	Date Received: <input type="text"/>
Description:	<input type="text"/>	
	Created By: <input type="text"/>	
	Updated By: <input type="text"/>	

Bid List Selection (BQUPLS)

The primary purpose of this screen is to establish the complete list of valid vendors. You will be able to use a combination of commodity codes, product codes, and any special selection criteria necessary to establish the system-derived list of valid vendors. Vendors can then be added to or deleted from the list generated.

Any information entered on this screen will be validated. The commodity codes and product codes will be validated against current product information stored within the IFAS Person/Entity system. Any special selection criteria will be validated against the information stored as a part of the vendor file within IFAS.

Entering a “Y” in the build list field will direct the system to create the suggested list and display the first six items on the screen. You will then be able to scroll through the list, six at a time, to see all vendors selected. The information displayed will include the current status of the vendor, the last time a bid was sent to them, and the last time any part of a bid was awarded to them. Any vendors added to the list will be added by entering the vendor ID and will be validated against the vendor file stored in the IFAS Person/Entity system.

Bid Number: JG772B1 **Short Desc:** Jennys 772 Bid Ifas77

Product Codes:

075-00	AUTOMOTIVE SHOP EQUIPMENT AND	JGNS1	yg non stocked ea

Special Selection Criteria: (User Association Values)

JG **Build List**

Sele	Vendor ID	Vendor Name	Status	Last Bid	Last Award
<input checked="" type="checkbox"/>	JG740FBB	yg 740fb Oracle 7i Id 2k3 server			
<input checked="" type="checkbox"/>	JGV1	yg vendor 1due 30			
<input checked="" type="checkbox"/>	JGV5	JG VENDOR 5 DUE 5 PODISC 10			
<input checked="" type="checkbox"/>	JGV741	dkfj lakdjf			
<input checked="" type="checkbox"/>	JGVEFT1	JG EFT VENDOR ONE			
<input type="checkbox"/>					

Bid Response Screen (BQUPIT)

All of the detailed bid responses will be entered on this screen. One of these screens is completed for each response received for each individual line item on the bid. In other words, if 10 vendors provided a price for an item on a bid, then 10 of the screens will be completed.

This screen is used as a primary data entry screen. It is used to record all types of bids that are received. There may be multiple occurrences of this screen for each individual bid item. After all bids have been entered, you will typically browse by price in ascending order and award to

the lowest priced, best solution. By placing a “Y” in the award field for the vendor selected, the system will prompt the user for the PO number they want the item placed on. If the PO prompt is left blank, the system will generate a PO for the item.

The information on this screen will be used by several of the IFAS systems, such as Purchasing Management, and the Person Entity system for product information. Additional information such as “Meet Specs” and “Performance Code” will be used by the system to establish and track overall vendor performance within the agency. Entries into several of the fields will actually trigger other actions. Additionally, when the product is awarded, the price and primary vendor fields in the product information screen will be updated with the current information.

Bid Number:	<input type="text" value="J"/>	Short Desc:	<input type="text" value="Testing"/>	
Buyer:	<input type="text"/>	Bid Status:	<input type="text" value="OP"/>	<input type="text" value="Open"/>
Line Number:	<input type="text" value="0000"/>	Exempt:	<input type="text"/>	
Vendor:	<input type="text"/>			
Product Code:	<input type="text"/>	Brand:	<input type="text"/>	Responsive <input checked="" type="checkbox"/>
Product Desc:	<input type="text"/>	Vendor Item Code:	<input type="text"/>	Meets Specs <input checked="" type="checkbox"/>
Price:	<input type="text" value="0.00"/>	Awarded:	<input type="text"/>	Award Date: <input type="text"/>
Quantity:	<input type="text" value="0"/>	Extended Price:	<input type="text" value="0.00"/>	Haz Mat <input type="checkbox"/>
Unit of Measure:	<input type="text"/>	Good Thru Date:	<input type="text"/>	Alt Item Avail <input type="checkbox"/>
Terms:	<input type="text"/>	Contact Name:	<input type="text"/>	
Order Point Min:	<input type="text"/>	Order Point Max:	<input type="text"/>	Time Line <input checked="" type="checkbox"/>
Est Lead Time:	<input type="text"/>	Running Total:	<input type="text" value="0.00"/>	Fixed Asset <input type="checkbox"/>
Comment:	<input type="text"/>			
		Qty in WHSE:	<input type="text" value="0"/>	

Bids Item Screen (BQUPI2)

The purpose of this screen is to enter the individual item detail for a quote. There may be some cases in which a total quote would be given for an item. Or you may receive the quote with an item by item detail, which would then be summed to the total quote. You can enter the total quote on the Bid Item screen or you could enter the item detail on the Bid Item 2 screen. (EX: One lump sum quote of \$5,000 for a computer unit vs. Monitor \$450, Keyboard \$45).

Bid Number:
Buyer:

Vendor:

Line Number	Product Code	Product Desc	Price
0001	JGNS1	jg non stocked ea	11.12
0001	JGNS1	jg non stocked ea	11.11
0002	JG2	JG 2	10.00
0002	JG2	JG 2	12.00
0000			

Bid/Prod Screen (BQUPPR)

Once you've assigned all product codes to selected vendors, based upon the bid number your currently working with, this screen will allow you to scan/view what you've done.

The BIDS screen to process purchasing information uses this information. If you wish, you may manually create entries in this screen. **Note:** If you manually create entries here, you will lose some of the historical information that's keep in the BDITEM screen and used in inquires and reports. The system uses the information on this screen to associate vendor/product combinations with a specific bid number.

Project: <input type="text"/>		Description: <input type="text"/>		Status: <input type="text"/>	
Project		Job	Proj Task	Proj Vendor	Proj Notes
GL Account: GL	<input type="text" value="KEY"/>	<input type="text"/>			
Assign Date: <input type="text"/>	Assoc Proj: <input type="text"/>	Court Aprv Date: <input type="text"/>			
Type: <input type="text"/>	Buyer: <input type="text"/>	Begin Date: <input type="text"/>			
Commodity: <input type="text"/>	Coordinator: <input type="text"/>	End Date: <input type="text"/>			
Insurance: <input type="checkbox"/>	Term: <input type="checkbox"/>				
Renewals: <input type="text" value="0"/>	Max Renewals: <input type="text" value="0"/>	Create Date: <input type="text"/>	Created By: <input type="text"/>		
Amendment: <input type="checkbox"/>	Amend Court Date: <input type="text"/>	Update Date: <input type="text"/>	Updated By: <input type="text"/>		

Bid/Quote Screen (BQUPVQ)

This is a stand-alone screen. It will be used to record phone quotes and other types of quotes that are of a more informal nature. There may be multiple occurrences of this screen for each quote number. After all quotes have been entered, you will typically browse by price in ascending order and award to the lowest priced, best solution. By placing a “Y” in the award field for the vendor selected, the system will prompt update the corresponding purchase request with the new information. It will also, at the same time, set the award field to “N” for all other vendors with this quote number.

The screenshot displays the Bid/Quote Screen (BQUPVQ) with the following fields and controls:

- Quote Number:** [Text Field]
- Status:** [Dropdown: OP] [Text: Open]
- Good Thru:** [Date Picker: 06/22/2007]
- Good for:** [Text: 0] Day(s)
- Description:** [Text Field]
- Purchase Req:** [Text Field]
- PR Status:** [Text:]
- Manually Modify PR:**
- Buyer:** [Text Field]
- Buyer Name:** [Text Field]
- Vendor ID:** [Text Field]
- Vendor Name:** [Text Field]
- Address Code:** [Dropdown]
- Contact Name:** [Text Field]
- Phone:** [Text Field]
- Auto Create Items**
- Use Alternate Description**
- Quantity in Inventory:** [Text: 0]
- Item #:** [Dropdown]
- Item Description:** [Text Field]
- Unit Price:** [Text: 0.00]
- Qty:** [Text: 0]
- Product Code:** [Text Field]
- Product Description:** [Text Field]
- Units:** [Dropdown]
- Delivery Date:** [Date Picker: 06/22/2007]
- Delivery In:** [Text: 0] Day(s)
- Vendor Responded**
- Award Item**

Bid Project Tracking (BQUPPR)

Overall bid tracking is performed on this screen. Once a valid bid number has been entered, the system will display the assigned buyer, the associated bid cycle, and the current status of the bid as a whole. A complete list of bid task numbers will be generated, showing six at a time. Scrolling forward through the remaining task numbers can see additional tasks.

Users, with appropriate security, will be able to record the start and end dates of each individual task of the bid. Upon entry of the ending date, you will be prompted for the ID of the person who signed off that the task was in fact complete. The system will default in the current users ID, but will allow an override ID to be entered. Also, if a user enters a “Y” in the completed field, the system will insert the current date into

the end date field. If additional information is necessary, you will be able to enter a “X” in the “Comments” field. The system will, upon entry of the “X”, take the user to the bid free form comments screen for the data entry of the comments.

Bid Number:

Cycle ID:

Buyer:

Short Desc:

Bid Status:

Bid Task
Comments

Step	Task ID	Description	Begin Date	End Date	Approved Signoff	Completed	See Comments
						<input type="checkbox"/>	<input type="checkbox"/>

Task Definition Screen (BDTASKDF)

This screen will be used to define all tasks that will be used in a formal bid process. The definition will include any task dependencies that the user wants IFAS to control. If dependencies are established, IFAS will validate them as users try to mark tasks as complete. For example, all pre-tasks must be completed prior to the system allowing the task in question to be marked as completed. Pre- and post-tasks can be established as required. You will be able to “page” through all items entered.

Another item on this screen is the number of days necessary to complete the task. These days may be expressed in either business (i.e., workdays) or calendar days. This information will be used to establish a total timeline for a complete bid cycle. One line for miscellaneous comments is allowed at the bottom of the screen. The user may enter more than two lines but the display will be limited to two lines at a time. By pressing return, you will be able to scroll through all text that has been entered.

The screenshot displays the Cycle Definition Screen (BDCYCLE) with the following fields and options:

- Task ID:** A text input field with a dropdown arrow.
- Task Title:** A text input field.
- Description:** A two-line text input area.
- Task Days Required:** A numeric input field with a value of 0, and two radio buttons: Business and Calendar.
- Task Dependencies:** A section with two columns: **Pre-Tasks** and **Post-Tasks**. Each column contains five rows, each with a dropdown arrow and a text input field.
- Comments:** A two-line text input area.

Cycle Definition Screen (BDCYCLE)

The primary purpose of this screen is to establish the complete cycle of any formal bid process. Each site will have numerous occurrences of this screen. The overall flow of the cycle being defined is controlled by the order in which the task numbers are entered.

The system will, based upon the tasks entered, calculate both the business days and calendar days necessary to complete the entire process.

The other requirements section, for code and description, will be used to track things that may be required as part of a task but are not significant enough to warrant being set up as a separate task. It should be noted that all time required for other requirements must be included with the task's time that they are associated with. One line for miscellaneous comments is allowed at the bottom of the screen. This field is limited to the one line.

Cycle ID: Title:

Description:

Total Days Needed: 0 Total Calendar Time: 0

Step: Task ID:

Days Req: Type: Code:

Comments:

Create Purchase Orders Utility (BQUTCP)

Once you've assigned all Product Codes to selected Vendors, based upon the Bid Number your currently working with, this utility will make all the necessary Purchasing System adjustments.

UT - Utilities

- CP - Create Purchase Orders
 - Bid Number to be processed
 - Line Printer Copies, Name, Pri.
 - Options

This utility launches the process to update/modify the Purchasing System with the information stored in Bid Project Tracking. Once you've completed the process of selecting/assigning/awarding a specific vendor to the Bid/Product Code, you'll run this utility to update the Purchasing System. All Purchase Requests that have this bid assigned to them will get updated.

This process will:

1. Select all Purchase Requests (and all corresponding items) that have this Bid Number assigned to it.
2. Step through them, verifying each Item, and if need be, create a secondary Purchase Request Number, with the correct Vendor ID, and assign the item to it.
3. Link all Purchase Requests with this Bid Number and matching PEID's so as to combine all matching Purchase Request/PEID combinations to produce one PO for each combination.

When run, the utility will prompt for a Bid Number. The number entered here will be validated against those created on the Formal Bid Screen (BQUPBI).

The prerequisite for running this utility is to have entered a bid number on the purchase request screen and entered a product code on the item screen.

The system will step through the purchasing system, looking for all purchase Requests that have a matching bid number. Once they've been tagged, a second search of all items associated with each purchase request will be looked at. Each item that has a product code on it will be verified that it has the proper vendor ID associated with it. If the item requires a different vendor, then a secondary purchase request will be created, using the original purchase request, the last two characters (7-8) will be changed to AA, AB, AC, AD, etc. This will happen for a maximum of 50 items per purchase request. This will allow the user the ability to track any changes to their original purchase request. Searches will show sequentially the additional Purchase Requests that were created.

Once all this has occurred, the system will then join all like purchase requests, based upon Vendor ID, giving a sequential, numeric join code to all items that occur within the purchase requests with the selected bid number. Once this is done, you may print the purchase request in the normal fashion.

4.1.2 Processing

BQM Coded Tables

BM_CODES Screen

The BM_CODES screen (below) represents the code table associated with the Bid/Quote Management Subsystem. This table must be set up prior to using Bid/Quote Management. Coded values will be determined for specific fields. The codes will be determined by the staff to allow consistent and fast data entry. Once the codes are set in place they will be retrieved by the use of the F1 key on the main entry screens.

The established Code ID's within the program are listed below:

- DEPT for Department
- RENEW for Renewal dates
- STAT for Status

The programmer has set these abbreviations in place. You must use them to make entries into the code table. The entries for the Code Value may be alpha or numeric and your choice for the entries. The description allows up to fifty characters. The description will echo to the entry screen once the operator has used the F1, gone to the line of the choice and has hit enter. The code value then appears in that field. The operator then uses tab to go to the next field and the description will appear on the screen.

Code value means an abbreviation, which will be quickly identified to represent an item of entry. The entry can be as many characters as will fit into the field on the main screens. Be sure you understand which field will use the code value because the entry area in the code table allows for more characters than some of the entry fields.

Code ID	Code Value	Description
STAT	AW	Awarded
STAT	OP	Open
TASK	JGT1	JG Task One
TASK	JGT2	JG Task Two
TASK	JGT3	JG Task Three

The entry into the common code system, which needs to be established, will be PEAS, BIDLIST, @@, and medium Description BIDLIST. There are no entries into the Code ID, Code Value, or description. Then, access the PEUPPE and enter the following information into the second screen. Enter the vendor ID. Do not change the vendor description. Under code ID, enter BIDLIST, and code value will be your entry, which will be used to pull the vendors to the BIDLIST. (EX: OS for Office Supplies) Description is the written definition of what you are entering into the system.

Go into POUPPR and enter two test PR status items (use the office number system to generate these items). The purchase request must be associated with a correct vendor and Bid Number. Complete this step prior to entry into the BDITEM screen. There is a validation done at the entry into the system to verify you have an outstanding Purchase Request. Go into POUPRC for receiving to associate the Purchase Request to individual items. You will get a small box asking if you want to print a receiving report -- default is NO. Choose NO and select the check in the upper left corner. This screen will allow an entry by item number. If the office is using a many to one ratio on the PR to Bid this is not as important as it is if they are using a one to one ratio. Enter several of the products, which were entered onto the BDLIST screen. You must

enter a different Status if you intend to use the Quote screen in Bid/Quote. The entry in the Status field will be QR for the connection to this screen.

4.1.3 Utilities

4.1.4 Reports

Under Construction

4.2 Bid Online Process Reference

4.2.1 Entry

7i Screens on the BO Server

There are six screens that provide access to the Bid Online tables. These screens are provided for setup and troubleshooting purposes and are not intended to be used for regular data entry.

As the screens may exist on a separate server, they have no menu mask in IFAS. To access the screens, enter the URL directly into the browser using the following format:

`http://<bid_online_server>/ifas7/screens/BidManagement/<screen_name>.asp`

Replace <bid_online_server> with the name of your Bid Online server, and replace <screen_name> with the screens described below.

Record 1 of 2

Entity: BSI Ledger: GL

New Bidder Status: AP

Nucleus Seed: BIDDERID

Created By: JEFF 2/8/2006 2:27:31 PM

Updated By: JEFF 2/17/2006 3:45:44 PM

BQBOGN

Record 1 of 3

Entity: Entity Name:

Local Time Zone: Daylight Saving

Starting Instructions:

Ending Instructions:

BQBOEN

Record 1 of 28402

Commodity Code: Code Type:

Description:

Part 1: Title:

Part 2:

Part 3:

Part 4: Definition:

Part 5:

BQBOCD

Record 3 of 5

Bidder ID: BQ00014
 Tax ID: 112233445
 ID Type: T
 Nucleus ID: BQ00014
 Status: AP

Company Name: Sierra Office Equipment and Supplies
 Profile Changed

Last Login:

Last Response:
 Created By: KYLE
 4/11/2006 3:27:30 PM

Last Award:
 Updated By: BQ00014
 4/11/2006 3:29:28 PM

Bid Contact	Order Contact	Pay Contact	Commodities
Contact Name: Jeff Meyers			
Address 1: 123 Main Street			
Address 2: <input type="text"/>			
Address 3: <input type="text"/>			
Address 4: <input type="text"/>			
City: Chico		State: CA	Zip: 95926
Country: <input type="text"/>			
Phone: (530) 893-1500			
Fax: <input type="text"/>			
Email: jeff@sierra.com			

BQBOBR

Record 1 of 8

Bid Number: B7 **Entity:** DEVGL **Ledger:** GL **Type:** B **Status:** PB

Description: Test Quote **Contact User:** JEFF

Advertise Date: 04/21/2006 Allow Bid Attachments

Open Date: 04/21/2006 Allow Shipments **Decrypted By:** [] []

Close Date: 04/22/2006 Post Award to Public **Created By:** JEFF 4/21/2006 1:22:54 PM

Opening Date: 04/21/2006 **Updated By:** JEFF 4/21/2006 3:35:11 PM

Shipments Questions and Answers Assignments Amend Acknowledgements

Bidder ID: [] **Shipment Number:** []

Shipped Via: [] **Tracking Number:** []

Date Shipped: [] **Estimated Arrival Date:** [] **Date Received:** []

Description: []

Created By: [] []

Updated By: [] []

Add Mode

B7
B6
B4
B3
B2
B1
B6
B2

BQBOBD

Record 1 of 8

Entity: Ledger: Bid Number: Type:

Advertise Date: Open Date: Close Date: Opening Date:

Decrypted By: Created By:

Decrypt Date: Updated By:

Field Name: Field Type:

Old Char:

New Char:

Old Num:

New Num:

Old Date: Created By:

New Date: Updated By:

Record 1 of 6

BQBOLG

4.2.2 Processing

Under Construction

4.2.3 Utilities

Under Construction

4.2.4 Reports

Under Construction

5 Troubleshooting

5.1 Bid/Quote Troubleshooting

Under Construction

5.2 Bid Online Troubleshooting

Under Construction

6 Advanced/Special Configuration

6.1 Bid/Quote Advanced Configuration

Under Construction

6.2 Bid Online Advanced/Special Configuration

Under Construction

7 Module Integration

7.1 Bid/Quote Integration

7.1.1 Posting

Under Construction

7.1.2 Security

Under Construction

7.1.3 Interfaces

Under Construction

7.2 Bid Online Integration

Under Construction

7.2.1 Posting

Under Construction

7.2.2 Security

Under Construction

7.2.3 Interfaces

Under Construction

8 Implementation

Under Construction

8.1 8.1

Under Construction

8.1.1 Dependencies

Under Construction

8.1.2 Template Project Plan

Under Construction

8.1.3 Agenda

Under Construction

8.2 Bid Online Implementation

8.2.1 Dependencies

Under Construction

8.2.2 Template Project Plan

8.2.3 Agenda

Bid Online - Agenda

Consulting Objectives

<p>Who should Attend Consulting Objectives BO0001 – BO0025:</p> <p>Functional Team Members and Functional Area Specialists as needed</p>		
CF0001	000	General Overview
	010	Client and Consultant Introductions
	020	Contact Information
	030	Identify personnel responsible for IFAS implementation
	040	Review Consulting Objectives
	050	IFAS documentation – Insider downloads
BO0001	000	IFAS Configuration - Currently Configured by Product Manager
	010	Common Codes
	020	Nucleus Association
	030	Define General Settings
	040	Attach Definitions
	050	Load Commodity Codes
	060	Define Dashboard Favorites
BO0005	000	Bid Online Configuration - Currently Configured by Product Manager
	010	Common Codes
	020	Define Nuclues User Seed

	030	Create Nucleus Users
	040	Define Entities
	050	Define General Settings
	060	Create Attachment Definitions
	070	Load Commodity Codes
	080	Configure Dashboard Settings
	090	Connection Setting
	100	Bid Online Public Home Page
BO0010	000	Bid Online Overview
	010	Integration Picture
	020	System Process
	030	System Features/Functions Demonstration
BO0020	000	Bid Online Process
	010	Create Purchase Requisition
	020	Create Bid in Bid Quote and Assign to Requisition
	030	Add Bid Online Information
	040	Define Questions and Assign to Bid
	050	Publish Bid
	060	Register as a Bidder

	070	Respond to Bid
	080	Open Bid
	090	Publish Award
CF0010	000	Process Testing
	010	Confirm all processes are working correctly
CF0015	000	Parallel Testing
	010	Compare IFAS data to legacy system
CF0020	000	Live Assist
	010	Provide support for issues that arise
CF0025	000	Post Live Assist
	010	Advanced reporting and outstanding issues

9 FAQ

9.1 Bid/Quote FAQ

Under Construction

9.2 Bid Online FAQ

9.2.1 Troubleshooting (FAQs)

Q: The Bid Online plug-ins do not appear in the admin console.

A: Using the BtAdmin configuration tool, choose the Security Apply Base Structure option to define security for the new console options.

10 Reference

10.1 Bid Online Database Table Structure

10.1.1 IFAS Structures

Bid Online data on the IFAS server is stored in tables added to the Bid Quote module. Some of these new tables are linked to the primary bid table BD_BDFBID.

Bid Online (BQ Side)

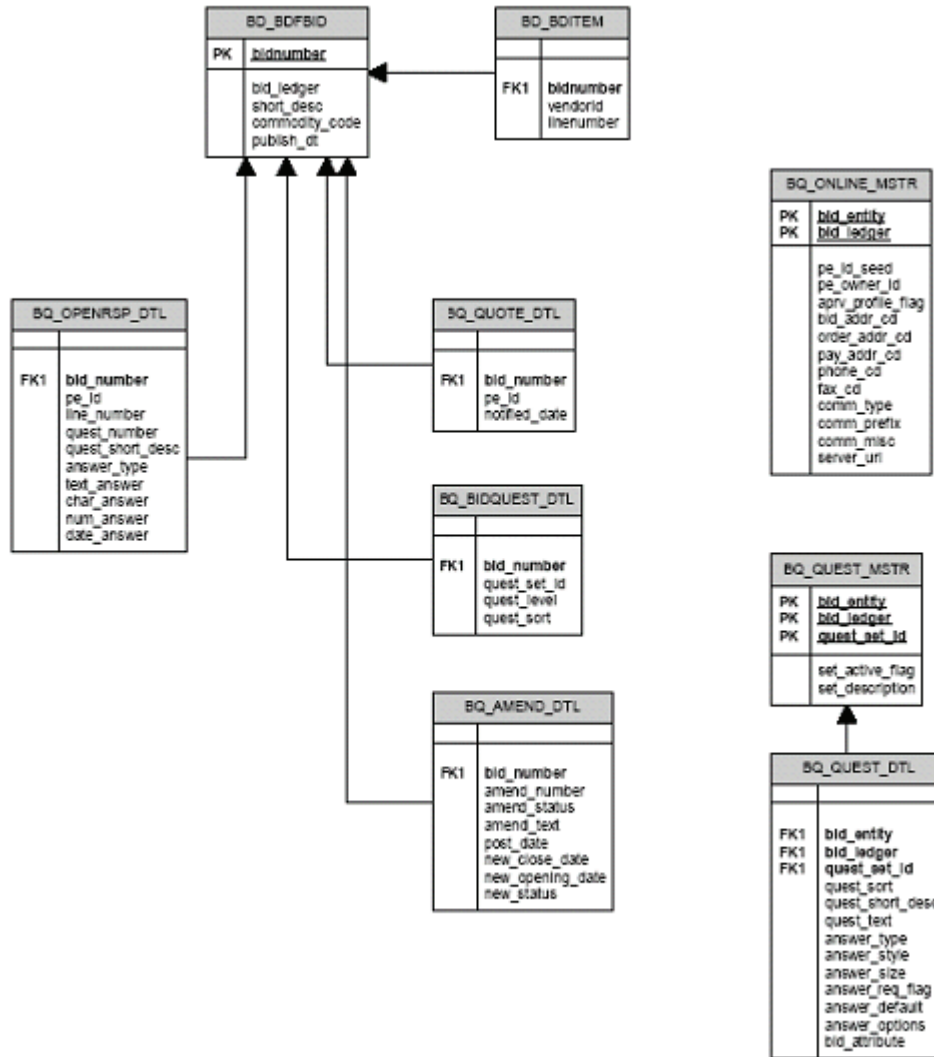


Table Name: BD_BDFBID

Parent of: BD_BDITEM, BQ_OPENRSP_DTL, BQ_QUOTE_DTL, BQ_BIDQUEST_DTL, BQ_AMEND_DTL

Child of: <none>

Description: this is the primary “master” table of bids defined in the Bid Quote module.

Table Name: BD_BDITEM

Parent of: <none>

Child of: BD_BDFBID

Description: this table stores all of the bid response data for each item tracked in the Bid Quote module. Each row is the bidder’s information and evaluation information for one bid item.

Table Name: BQ_OPENRSP_DTL

Parent of: <none>

Child of: BD_BDFBID

Description: stores all of the item-level responses imported from Bid Online. Each row is one answer to one question. Answer type determines which of the remaining fields will be populated.

Table Name: BQ_QUOTE_DTL

Parent of: <none>

Child of: BD_BDFBID

Description: stores the list of PEIDs to solicit for quotes when publishing a quote to Bid Online.

Table Name: BQ_BIDQUEST_DTL

Parent of: <none>

Child of: BD_BDFBID

Description: stores the list of question sets linked to a bid. These questions sets will be exported to Bid Online when the bid is published.

Table Name: BQ_AMEND_DTL

Parent of: <none>

Child of: BD_BDFBID

Description: stores the information about an amendment to a published bid.

Table Name: BQ_ONLINE_MSTR

Parent of: <none>

Child of: <none>

Description: Defines configuration settings used by the Bid Online module.

Table Name: BQ_QUESTION_MSTR

Parent of: BQ_QUESTION_DTL

Child of: <none>

Description: stores the description and status of each question set.

Table Name: BQ_QUESTION_DTL

Parent of: <none>

Child of: BQ_QUESTION_MSTR

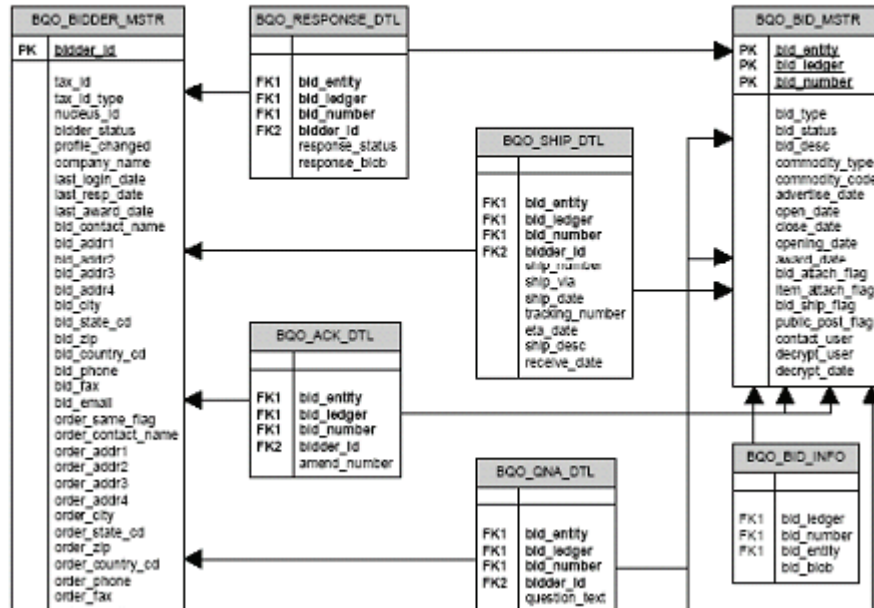
Description: stores information about questions that will be presented to bidders. Each row is one question.

10.1.2 Bid Online Structures

Data stored on the Bid Online server are kept in tables as shown below.

Bid Online (BO Side)

Updated: 4/10/06



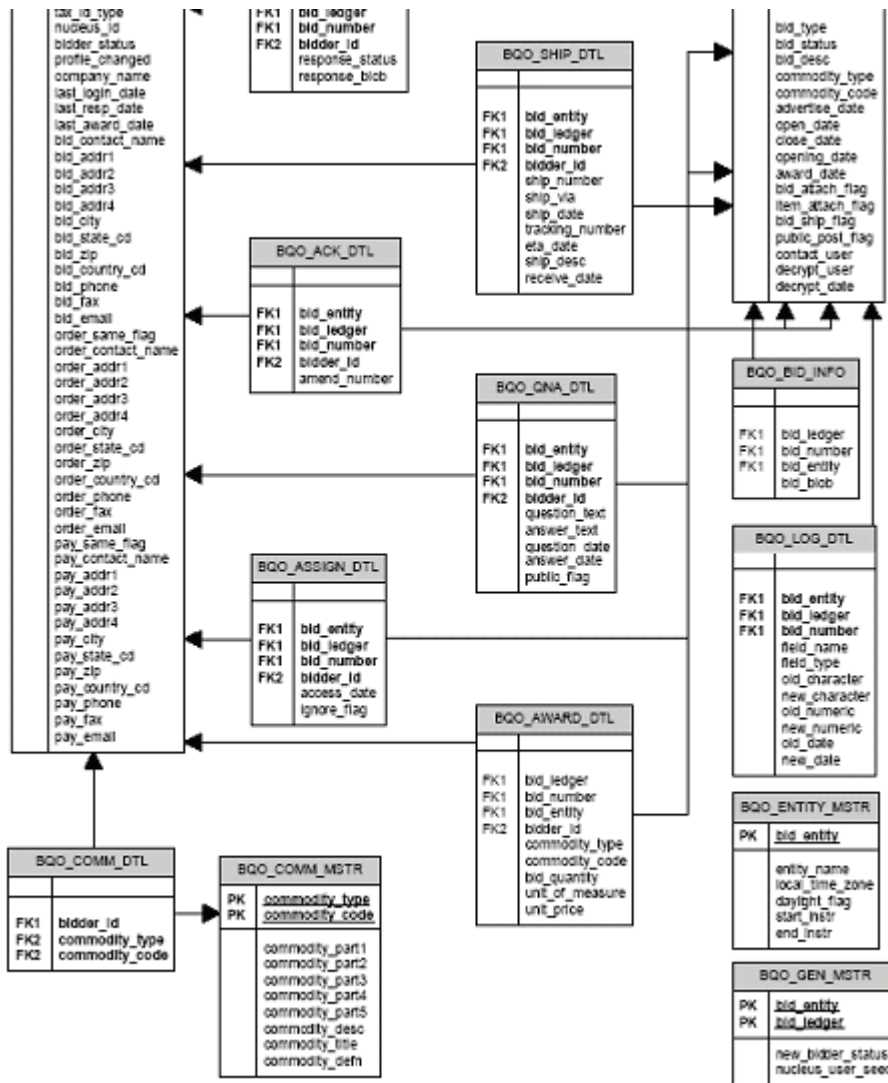


Table Name: BQO_BIDDER_MSTR

Parent of: BQO_RESPONSE_DTL, BQO_COMM_DTL, BQO_ACK_DTL, BQO_ASSIGN_DTL, BQO_SHIP_DTL, BQO_QNA_DTL, BQO_AWARD_DTL

Child of: <none>

Description: stores information about a Bid Online bidder.

Table Name: BQO_BID_MSTR

Parent of: BQO_RESPONSE_DTL, BQO_SHIP_DTL, BQO_ACK_DTL, BQO_QNA_DTL, BQO_ASSIGN_DTL, BQO_AWARD_DTL, BQO_BID_INFO, BQO_LOG_DTL

Child of: <none>

Description: stores the “house keeping” information about a bid that has been published to Bid Online. The bulk of the bid data is stored as XML in a blob on the BQO_BID_INFO table.

Table Name: BQO_RESPONSE_DTL

Parent of: <none>

Child of: BQO_BIDDER_MSTR, BQO_BID_MSTR

Description: stores a vendor’s response to a bid. All of the data is kept as XML in a blob. This blob is encrypted and can only be decrypted after the Bid Opening time has been reached.

Table Name: BQO_SHIP_DTL

Parent of: <none>

Child of: BQO_BIDDER_MSTR, BQO_BID_MSTR

Description: stores information about one shipment from a bidder, related to a bid.

Table Name: BQO_ACK_DTL

Parent of: <none>

Child of: BQO_BIDDER_MSTR, BQO_BID_MSTR

Description: stores a record of acknowledgement of an amendment from a bidder.

Table Name: BQO_QNA_DTL

Parent of: <none>

Child of: BQO_BIDDER_MSTR, BQO_BID_MSTR

Description: tracks questions from bidders and answers from buyers.

Table Name: BQO_ASSIGN_DTL

Parent of: <none>

Child of: BQO_BIDDER_MSTR, BQO_BID_MSTR

Description: stores list of bidder IDs who are “involved” with a bid. “Involved” means they have been notified of a newly posted bid, responded to a bid, or are a bidder listed for a quote.

Table Name: BQO_AWARD_DTL

Parent of: <none>

Child of: BQO_BIDDER_MSTR, BQO_BID_MSTR

Description: stores the details about awarded items for a bid.

Table Name: BQO_COMM_MSTR

Parent of: BQO_COMM_DTL

Child of: <none>

Description: stores the definition of all commodity codes used on the Bid Online server.

Table Name: BQO_COMM_DTL

Parent of: <none>

Child of: BQO_BIDDER_MSTR, BQO_COMM_MSTR

Description: stores the list of commodity codes for which a bidder has subscribed.

Table Name: BQO_BID_INFO

Parent of: <none>

Child of: BQO_BID_MSTR

Description: for each bid published in Bid Online, this record holds the blob containing the bid information in XML format.

Table Name: BQO_LOG_DTL

Parent of: <none>

Child of: BQO_BID_MSTR

Description: stores changes to the bid for audit purposes.

Table Name: BQO_ENTITY_MSTR

Parent of: <none>

Child of: <none>

Description: stores definition of each entity that is allowed to connect to a given Bid Online server.

Table Name: BQO_GEN_MSTR

Parent of: <none>

Child of: <none>

Description: stores configuration settings used by the Bid Online server.

10.2 Bid Online: Commodity Code Import File Formats

10.2.1 NIGP

The 5-digit NIGP commodity code list is loaded using the Administrative Console. The file is expected to be tab-delimited and contain three fields per record.

Field #	Description
1	3-digit Class code
2	2-digit Item Code
3	Description

Example of NIGP file:

005	00	ABRASIVES
005	05	Abrasive Equipment and Tools
005	14	Abrasives, Coated: Cloth, Fiber, Sandpaper, etc.
005	21	Abrasives, Sandblasting, Metal
005	28	Abrasives, Sandblasting (Other than Metal)
005	42	Abrasives, Solid: Wheels, Stones, etc.
005	56	Abrasives, Tumbling (Wheel)
005	63	Grinding and Polishing Compounds: Carborundum, Diamond, etc.
005	70	Pumice Stone

005	75	Recycled Abrasives Products and Supplies
005	84	Steel Wool, Aluminum Wool, and Copper Wool

10.2.2 UNSPSC

The UNSPSC commodity code list is loaded using the Administrative Console (see page XX). The file is expected to be in CSV format (i.e., comma-separated with quotes around fields that contain commas or quotes). If you are creating this file from the original UNSPSC spreadsheet, use the “library” worksheet

Field #	Description
1	Key code – not used
2	Commodity Code (always 8 digits)
3	Title
4	Definition

Example of UNSPSC file:

```
100001,10000000,Live Plant and Animal Material and Accessories and Supplies,,,,,,,,,
100002,10100000,Live animals,,,,,,,,,
100003,10101500,Livestock,,,,,,,,,
100004,10101501,Cats,,,,,,,,,
100005,10101502,Dogs,,,,,,,,,
100006,10101504,Mink,,,,,,,,,
100007,10101505,Rats,,,,,,,,,
100008,10101506,Horses,,,,,,,,,
100009,10101507,Sheep,,,,,,,,,
100010,10101508,Goats,,,,,,,,,
```