



State of Connecticut
DAS – Procurement Services



CTsource Training 2 Solicitations

January 20, 2021

Welcome to CTsource Training 2: Solicitations. This is the second of three trainings provided to you by the State of Connecticut – DAS Procurement Services CTsource Training Team. This webinar is being recorded and will be available on the DAS website. The Team is live and ready to answer any questions you may have after each video demonstration. We encourage you to enter questions in the Q&A section of this webinar and we will answer as many as time allows. All questions will be answered and posted on our website along with this recorded training session.



CTsource Training 2



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During this training, we will cover functionality for formal and informal solicitations, building solicitations using attachments, and how posting to the Bid Board works within CTsource. We will also cover managing the solicitation which includes posting addenda and the Q&A Center. After the solicitation closes we will show you how to evaluate supplier responses and award to supplier(s). Some of the functionality discussed today is not required and it is up to your organization as to whether or not you choose to take advantage of it. For example, it is not required to use the Q&A Center or complete the award process. These processes may be performed outside of CTsource as you may currently complete them today. We will highlight this information when we discuss those sections.

You may follow along with the PowerPoint slides. Each of the sections are hyperlinked. Simply hover over the link, press the Ctrl button and click your mouse to follow the link. The page numbers or slide numbers are listed in the bottom right corner. Also at the bottom of the screen you will find "breadcrumb" tabs in the ribbon: Formal/Informal, Manage, Evaluate, and Award. When a new section begins, the color of the tab will change and will indicate which section you are in.



Formal/Informal Solicitations



It is important to note that based on your organization's procurement rules, your organization will determine how to use the functionality we are about to demonstrate. We will be demonstrating the buyer role; not everyone viewing this training will have access to complete these functions, however, all other roles have the ability to view the results. This will be highlighted throughout the presentation.

There are two solicitation types from which to choose: Formal and Informal. These are the same with one exception: the formal solicitation has functionality to enforce the Sealed Bid requirement. This means that a solicitation cannot be awarded and supplier responses cannot be viewed prior to the End Date and Time set up for that solicitation.



Formal Solicitations



The screenshot displays the CT SOURCE web application interface. At the top, there is a navigation bar with the following items: Home, Solicitations, Contracts, Approval, Analytics, Vendors, and Admin. The 'Solicitations' dropdown menu is open, showing options for Formal Solicitations (Create, View Current, Review / Award, View Archived) and Informal Solicitations (Create, View Current, Review / Award, View Archived). The 'Create' option under Formal Solicitations is circled in red. Below the navigation bar, there is a 'My Links' section with an 'Add New Link' button. At the bottom of the page, there is a footer with the text 'CTsource Training 2' and a series of buttons: 'Formal/Informal' (highlighted in green), 'Manage', 'Evaluate', and 'Award'. The number '4' is visible in the bottom right corner of the footer.

To create a Formal Solicitation, select *Create* from the *Solicitations* dropdown menu.
[DEMO]



Formal Solicitations



The solicitation window (WebProcure: Create Bid Form) opens. Just below the main tool bar is the solicitation navigation bar with *Header* highlighted. The solicitation navigation bar indicates the current step the user is in during the solicitation creation process.

The system requires you to go through each step in the solicitation navigation bar as you build the solicitation. All fields with an * (asterisk) are required.

[DEMO]



Formal Solicitations



Header Requirements Questionnaire Attachments Item Specs Suppliers Summary

Formal Solicitation Header Information

Number *
691

Title *
2020_Training2_FormalSolicitationExample

Solicitation Type
Invitation to Bid (ITB)

Evaluation Type *
Single Envelope

Who can see this bid?

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The solicitation number automatically populates. This may be overridden to reflect a unique solicitation number.

Enter the name of the solicitation in the *Title* field. Select the type of formal solicitation from the *Solicitation Type* dropdown menu.

Select either *Single Envelope* or *Two Envelope* in the Evaluation Type field.

A **Two Envelope System** separates vendor responses to **Formal Solicitations** into two sealed bids, or envelopes: a technical proposal and a price proposal. The envelopes are evaluated independently to ensure procurement integrity and reduce the risk of pricing criteria unfairly influencing the evaluation process. This process is typically associated with **Formal Solicitations** of the **Request for Proposal (RFP)** type.)

[DEMO]



Formal Solicitations



Single Envelope

Who can see this bid?
Everyone

Who can respond to this bid?
All Vendors

Calculate Estimated Total Value from Sum of Estimated Line Item Total Price:

Estimated Total Value: 1150

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For solicitations posted to the public bid board (typically formal solicitation), select “Everyone” from the dropdown menu of the *Who can see this bid?* and “All Vendors” from the *Who can respond to this bid?* **[DEMO]**

For solicitations not posted to the public bid board (typically informal solicitation), select “Invited Vendors Only” from the dropdown menu of the *Who can see the bid?* and “Invited Vendors Only” from the dropdown menu of the *Who can respond to the bid?*



Formal Solicitations



The screenshot shows a web form for creating a formal solicitation. It includes the following fields and controls:

- Calculate Estimated Total Value from Sum of Estimated Line Item Total Price:** A dropdown menu currently set to "No".
- Estimated Total Value : USD:** A text input field containing "50000".
- Description:** A text area containing "Training courses using PowerPoint and live demonstration".
- Justification:** A text area containing "NA".
- Justification Attachments:** A section showing "No Attachments" and an "Add new document" button.

Red arrows on the left side of the form point to each of these five elements.

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Calculate Estimated Total Value from Sum of Estimated Line Item Total Price defaults to *No*. This will not apply for bids without line items entered on the Item Spec page.

Enter the estimated total value of the solicitation in the *Estimated Total Value* field. This value will not be visible to the suppliers and is only used for Approval Workflow and Reporting.

Enter a description in the *Description* field. This field is used to provide an overview of the products and services requested by your organization. The description allows the suppliers to review for products and services at a quick glance so enough information should be provided so that it can capture the suppliers' interest when viewing/participating in the solicitation. Maximum of 2,000 characters.

Enter a justification for the solicitation in the *Justification* field and attach any necessary documents in the *Justification Attachments* field. These will not be visible to the suppliers and is only used for Approval Workflow and Reporting.

[DEMO]



Formal Solicitations



The screenshot displays a web application interface. On the left, a form titled 'Calculate Estimated Total Value from Sum of Estimated Line Item Tot...' contains fields for 'Estimated Total Value : USD' (50000), 'Description' (Training courses using PowerPoint and live demonstration), 'Justification' (NA), and 'Justification Attachments' (No Attachments). A red arrow points from the 'Add new document' button in the attachments section to a modal window on the right. The modal window, titled 'Upload Document', provides instructions on how to upload files and features a 'File Name' label and four 'Browse...' buttons for selecting files.

PLEASE NOTE: The *Add New Document* functionality is the same throughout this application. Should you click on the button, WebProcure will open the *Upload Document* window for you to browse through documents available to you on your computer or shared drive for uploading purposes.

[DEMO]



Formal Solicitations



The *Solicitation Contact* will default to the user creating the document. You can search and update to add additional contacts or modify or delete what is there or replace with a different person. Type another CTsource user name in the *Find a Contact* box and select from offered choices; if not a CTsource user you must type the information in the text box provided.

The *Restricted Access* will default to *No*. Any individual with the buyer role in your organization will have the ability to edit your solicitation in your absence if needed. If you are to be the **ONLY** user (or small group of specific users) to have access to this solicitation, you may change this to *Yes*.

The check box for *This Solicitation will not contain any line items* is not checked by default. If a solicitation is not going to contain any line items but rather be used as a document passing vehicle between buyer and supplier, then check the box must be checked. The bid process will occur based on submitted documents by the suppliers. If this box is checked, then header level categories are required. At this time we are recommending to always check this box to post solicitations without line items to the Bid Board. Item Spec functionality may be used by your organization in the future and you may request additional training or resources at a later date.

[DEMO]



Formal Solicitations



This Solicitation will not contain any line items (Solicitation Categories are required)

Solicitation Categories **Select Categories**

Select Solicitation Categories

Search Clear Search

Available Categories	Selected Categories
<input type="checkbox"/> Apparel and Luggage and Personal Care Products (53000000)	
<input type="checkbox"/> Building and Construction Machinery and Accessories (22000000)	
<input type="checkbox"/> Building and Facility Construction and Maintenance Services (12000000)	
<input type="checkbox"/> Chemicals including Bio Chemicals and Gas Materials (12000000)	
<input type="checkbox"/> Cleaning Equipment and Supplies (47000000)	
<input type="checkbox"/> Commercial and Military and Private Vehicles and their Accessories and... (25000000)	
<input type="checkbox"/> Defense and Law Enforcement and Security and Safety Equipment and Supp... (46000000)	
<input type="checkbox"/> Distribution and Conditioning Systems and Equipment and Components (40000000)	
<input type="checkbox"/> Domestic Appliances and Supplies and Consumer Electronic Products (20000000)	
<input type="checkbox"/> Drugs and Pharmaceutical Products (51000000)	
<input type="checkbox"/> Editorial and Design and Graphic and Fine Arts Services (82000000)	
<input type="checkbox"/> Education and Training Services (89000000)	
<input type="checkbox"/> Electrical Systems and Lighting and Components and Accessories and Sub... (39000000)	
<input type="checkbox"/> Electronic Components and Supplies (32000000)	
<input type="checkbox"/> Engineering and Research and Technology Based Services (81000000)	
<input type="checkbox"/> Environmental Services (77000000)	
<input type="checkbox"/> Farming and Fishing and Forestry and Wildlife Contracting Services (70000000)	
<input type="checkbox"/> Farming and Fishing and Forestry and Wildlife Machinery and Accessorie... (21000000)	
<input type="checkbox"/> Financial Instruments, Products, Contracts and Agreements (64000000)	
<input type="checkbox"/> Financial and Insurance Services (84000000)	
<input type="checkbox"/> Food Beverage and Tobacco Products (90000000)	
<input type="checkbox"/> Fuels and Fuel Additives and Lubricants and Anti Corrosive Materials (15000000)	

Close

Solicitation Categories are required in order to save your solicitation and invite suppliers to view the opportunity. Suppliers that have registered with matching categories will receive an email invitation. BizNet used commodity codes that were developed in-house and are only applicable to the State and not applicable in other states. In CTsource, UNSPSC codes are used. UNSPSC stands for United Nations Standard Products and Services Codes.

To enter a category for the solicitation, click on *Select Categories* and the *Select Solicitation Categories* window opens. You can search for specific categories and clear that search. Select the highest level of the category that pertains to the solicitation. By doing so, all vendors that have selected lower-level categories in their supplier profile will be included in the solicitation invite. **[DEMO]**



Formal Solicitations



Select Solicitation Categories

Search Clear Search

Available Categories

- Commercial and Military and Private Vehicles and their Accessories and... (25000000)
- Defense and Law Enforcement and Security and Safety Equipment and Supp... (46000000)
- Distribution and Conditioning Systems and Equipments and Components (40000000)
- Domestic Appliances and Supplies and Consumer Electronic Products (52000000)
- Drugs and Pharmaceutical Products (51000000)
- Editorial and Design and Graphic and Fine Art Services (82000000)
- Education and Training Services (86000000)
 - Alternative educational systems (86110000)
 - Adult education (8611600)
 - Employee education (8611604)
 - Evening courses (8611601)
 - Parent education (8611603)
 - Part-time adult education services (8611602)
 - Distance learning services (8611500)
 - Educational exchanges (8611800)
 - Language schooling (8611700)
 - Educational facilities (86140000)
 - Educational institutions (86120000)
 - Specialized educational services (86130000)
 - Driving and flying and sailing (86131700)
 - Educational support services (86132200)
 - Fine arts (86131500)
 - Management education and training facilities (86133000)

Selected Categories

- Education and Training Services (86000000)
 - Specialized educational services (86130000)
 - Alternative educational systems (86110000)
 - Adult education (8611600)
 - Employee education (8611604)

Close

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Click the arrow before the box for the highest level category and you may view the subcategories. You may continue to drilldown to view subcategories if you so desire by clicking the arrows.

Click in the box next to the highest level category or categories to select those that pertain to the solicitation, the categories populate in the right window. By doing so, all vendors that have selected lower-level categories in their supplier profile will be included in the solicitation invite. Selecting multiple header categories will include and invite as many suppliers in the solicitation as possible. **[DEMO]**



Formal Solicitations



Once you have selected the appropriate category, click *Close*; the categories will populate and return you to the previous screen. **[DEMO]**

To remove a header category simply uncheck the appropriate check box under the Selected Categories column.



Formal Solicitations



Let's break down the UNSPSC for 4320150114:

Hierarchy	Category	
	Number	Name
Segment	43	Information Technology Broadcasting and Telecommunications Communications Devices and Accessories
Family	20	Components for information technology or broadcasting or telecommunications Computer Equipment and Accessories
Class	15	Computers Computer accessories
Commodity	01	Computer switch boxes Docking stations
Business Function	14	Retail

<https://www.unspsc.org/faqs#How%20does%20UNSPSC%20work>

All UNSPSC entities are identified with an 8-digit structured numeric code which both indicates its location in the taxonomy and uniquely classifies it. An additional 2-digit suffix indicates the business function identifier. For more information on how the UNSPSC hierarchy is set up and how UNSPSC works, go to <https://www.unspsc.org/> or the DAS Contracting Portal for a PDF reference guide.



Formal Solicitations



The screenshot shows a form titled "Additional Information" with four main sections:

- Delivery Terms:** A dropdown menu with "Free On Board Destination" selected. A red arrow points to the dropdown arrow.
- Delivery Notes:** A text box containing "NA". A red arrow points to the text box.
- Payment Terms:** A dropdown menu with "Net-45 Days" selected. A red arrow points to the dropdown arrow.
- Payment Notes:** A text box containing "NA". A red arrow points to the text box.

In the *Additional Information* box, select *Delivery Terms* and *Payment Terms* from the dropdown menus. Enter any notes pertaining to each *Delivery Notes* and *Payment Notes* as necessary.

Please note: Additional delivery and payment terms cannot be added to the dropdown options. Select the field option: "See Delivery Notes" or "See Payment Notes" and enter the pertinent data that applies in the text box. **[DEMO]**



Formal Solicitations



Custom Fields

Section Title: Electronic Signature

Instructions

Instructions IMPORTANT: The following electronic signature requires supplier agreement in order to respond to an Invitation to Bid (ITB). Suppliers responding to any other solicitation type are not required to agree. The individual submitting this electronic signature must be authorized to sign contracts on behalf of the company and must be listed as such in the company's corporate resolution/vendor authorization documents. Please keep in mind that the person listed as "authorized" must be the same person submitting their electronic signature when completing their company's submittal.

ELECTRONIC SIGNATURE OF PERSON AUTHORIZED TO SIGN SOLICITATIONS ON BEHALF OF THE COMPANY:

I am duly authorized to sign documents on behalf of this company. By selecting "I Agree" in the drop down box below, I confirm and understand the above.

Drop-down Options
I agree, I disagree
[Setup Drop-down Options](#)

In addition, the above named respondent fully acknowledges and agrees with all of the terms and conditions contained in this Solicitation/O

Drop-down Options
I agree, I disagree
[Setup Drop-down Options](#)

The respondent hereby certifies under penalty of false statement that all the information supplied is complete and true.

Drop-down Options
I agree, I disagree
[Setup Drop-down Options](#)

[Add Field](#)

[Add New Section](#)

Custom Fields can be created for your organization at the *Header* level for your organization by your Administrator. Your organization may determine whether or not to use this functionality. **[DEMO]**

This is an example of a custom field DAS Procurement Services is utilizing for their solicitations.



Formal Solicitations



Solicitation Duration

Start Date and Time (EST) *

12/21/2020, 6:00 AM

End Date and Time (EST) *

01/21/2021, 2:00 PM

Vendor Q&A Duration

Specify Vendor Q&A Duration

Vendor Q&A Start Date and Time (EST)

12/21/2020, 06:15 AM

Vendor Q&A End Date and Time (EST)

01/21/2021, 01:45 PM

Vendor may e-mail buyer directly

Exit Next Step

Solicitation Duration - Select the start and end dates and times from the drop-down boxes. Default times are defined but may be changed accordingly. Click Next Step to save entries on this page. **[DEMO]**

Vendor Q&A Duration – To enable this feature, select *Specify Vendor Q&A Duration* checkbox should this solicitation require a Q&A period. Select the appropriate start and end dates/times from the available drop-down boxes. The duration for the solicitation must start at least 15 minutes after the *Solicitation Duration Start* and end at least 15 minutes before the *Solicitation End* date and time, but may be shorter.

This provides two-way communication between buyers and suppliers for the solicitation. Vendors may submit questions relating to the active solicitation and buyers may respond directly or via addendum. Note this feature only works for CTsource registered suppliers, an addendum of the Q&A should be posted for transparency.



Formal Solicitations



Solicitation Duration

Start Date and Time (EST) *

12/21/2020, 6:00 AM

End Date and Time (EST) *

01/21/2021, 2:00 PM

Vendor Q&A Duration

Specify Vendor Q&A Duration

Vendor Q&A Start Date and Time (EST)

12/21/2020, 06:15 AM

Vendor Q&A End Date and Time (EST)

01/21/2021, 01:45 PM

Vendor may e-mail buyer directly

Exit Next Step

webprocure-stage.perfect.com says

You may lose your changes if you exit now without saving. Would you like to exit?

OK Cancel

Select *Exit* or *Next Step*. If you select *Exit*, you may lose the information you have entered thus far. Click *Next Step*. **[DEMO]**



Formal Solicitations



Header Requirements Questionnaire Attachments Item Specs Suppliers Summary

Requirements : 122120 - Training 2 Demonstration for Formal Solicitation

Enter one or more fields. Preset fields (if any) applicable to this Solicitation type have been automatically added.

Section Title: Requirements

Solicitation Requirements

Please see attached documents for solicitation requirements.

Add Field

Add New Section

Exit Previous Step Next Step

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By selecting *Next Step*, you will move forward in the create solicitation process to the next section: *Requirements*. Notice that *Requirements* is now highlighted.

Additional Fields could be defined at the Administrative Level for use. Functionality will become available at a later date for state agencies to use.

[DEMO]



Formal Solicitations



Section Title: Submission of Responses to Invitation to Bid Solicitations

Standard Terms and Conditions

The following Standard Terms and Conditions govern the Invitation to Bid (ITB) solicitation issued by the Department of Administrative Services (DAS), incorporated by reference into these Standard Terms and Conditions are applicable provisions of the Connecticut General Statutes, including but not limited to, those in Title 4a, Chapter 58 or Title 4d, Chapter 61 and applicable provisions of the Regulations of Connecticut State Agencies, including but not limited to, those that begin with and follow Section 4a-52-1 or 4d-9-1. Respondents shall comply with the statutes and regulations as they exist on the date of their ITB response and as they may be modified from time to time during the term of the Contract, as it may be amended.

Add Field

Add New Section

Exit Previous Step Next Step

If so desired, you may establish a requirement through the *Add New Section* feature. **[DEMO]**

Choose *Next Step* to move forward to the *Questionnaire* section. (You may also go back to *Previous Step* and *Exit*.)



Formal Solicitations



Header > Requirements > **Questionnaire** > Attachments > Item Specs > Suppliers > Summary

Questionnaire : 122120 - Training 2 Demonstration for Formal Solicitation

Enter one or more questions. Each supplier will have an opportunity to respond to each question when they enter their Solicitation response.

Enable Scoring Add Sections and Questions to Questionnaire Library

[Add New Section](#) [Add Questionnaire from Library](#)

[Exit](#) [Previous Step](#) [Next Step](#)

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Questionnaire, when enabled, allows for you to include section containers with questions that may be scored and weighted. Effective questions can provide insight into a supplier's capabilities and combined with the supplier responses, can simplify the scoring and review process, as well as contribute greatly to the awarding decision.

Scoring allows sections to be weighted and questions within those sections to have point values. Combined, these values become a weighted score and are used in the evaluation and awarding process. Or you can build questions without scoring.

Select *Next Step* when ready to proceed to the *Attachments* section. **[DEMO]**



Formal Solicitations



Header Requirements Questionnaire Attachments Item Specs Suppliers Summary

Document Selection : 691 - 2020_Training2_FormalSolicitationExample (Formal)

You may select the documents from the library by clicking on the "Upload Document from Library" button below. If the document does not exist, a new document can be uploaded by clicking on the "Upload New Document" button.

Upload Documents from Library Add new document

There are no documents for this Solicitation.

Exit Previous Step Next Step

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To select a document from the Library for your bid, select the *Upload Documents from Library* or *Add new document*. Document Library management - add and delete capability - is accessible to users with appropriate permissions.

[DEMO]



Formal Solicitations



The screenshot shows a web browser window with two tabs. The active tab is titled 'WebProcure - Personal - Microsoft Edge' and displays a document selection modal for 'Formal Solicitation 691'. The modal contains a table with the following data:

Select	Type	Document Name	Upload Date
<input type="checkbox"/>	1 DCS - 00 40 14	Certificate Of Authority - GREATER THAN 500K.docx	June 15, 2020 at 8:01:58 AM EDT
<input type="checkbox"/>	1 DCS - 00 40 15	CT DAS Prequalification Form - GREATER THAN 500K.pdf	June 15, 2020 at 8:01:58 AM EDT
<input type="checkbox"/>	1 DCS - 00 40 15	CT DAS Update Bid Statement - GREATER THAN 500K.pdf	June 15, 2020 at 8:01:59 AM EDT
<input type="checkbox"/>	1 DCS - 00 43 16	Standard Bid Bond - GREATER THAN 500K.docx	June 15, 2020 at 8:01:59 AM EDT
<input type="checkbox"/>	1 DCS - 00 45 14	GenConBidderQualStatement - GREATER THAN 500K.docx	June 15, 2020 at 8:01:59 AM EDT
<input type="checkbox"/>		1.docx	August 07, 2020 at 3:26:00 AM EDT
<input type="checkbox"/>		14PSX0239 Supplement 4 Draft.docx	September 02, 2020 at 5:24:23 AM EDT

The background page shows the 'WebProcure_v4' interface with a navigation menu and a main content area for 'Formal Solicitation : 691 - 2020_Training2_FormalSolicitationExample (Formal)'. It includes buttons for 'Upload Documents from Library' and 'Add New Document'.

To select a document(s) from the Library for your bid, select the *Upload Documents from Library* button. Scroll through the list and click the check box for any document (up to five) to add to your solicitation. You may sort list by clicking on the column heading (Type, Document Name, Upload Date). At the bottom of the page select Save. **[DEMO]**



Formal Solicitations



Or select *Add New Document* and the *Upload Document* window will open for you to browse and find those documents you wish to attach. After attaching all necessary documents, select *Next Step* to move forward to the *Item Specs* section.

To remove a document for an unissued solicitation, simply uncheck the box under the *Select* column for the document to remove.

[DEMO]



Formal Solicitations



Header Requirements Questionnaire Attachments **Item Specs** Suppliers Summary

Item Specifications : 711 - Test Solicitation (Formal)

Current Formal Solicitations : 0 Line Items
You have specified that no line items will be added to this Solicitation.

Item Spec Library Selected Item Specs

View, edit, delete and specify delivery information for items specifications.

Download Item Template Import Item Template Create Group Create New Item

This Solicitation contains no item specifications.

Exit Previous Step Next Step

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Item Specs functionality will be available at a future date. Please note that this current solicitation contains 0 line items. Item Spec Library functionality is system-wide functionality and will not be utilized until an enhancement is in place to separate organizations so that their items specs may be unique to their orgs.

Once finished, select *Next Step* to move to the *Suppliers* section. **[DEMO]**



Formal Solicitations



Header Requirements Questionnaire Attachments Item Specs **Suppliers** Summary

Supplier Selection : 711 - Test Solicitation (Formal)

Add Suppliers **Selected Suppliers**

[Check All] [Uncheck All]		
Supplier	Location	Actions
<input checked="" type="checkbox"/> Awesome Supplier 	100 Norway Street Boston MA 02115 United States	⋮
<input checked="" type="checkbox"/> Behavioral Heath Consultants, LLC	3018 Dixwell Avenue Hamden CT 06525 United States	⋮
<input checked="" type="checkbox"/> Best Supplier 	100 Norway St Boston MA 02115 United States	⋮

The *Suppliers* section will default to *Selected Suppliers*. Supplier names are hyperlinks to their vendor profile, notice that some suppliers have icons next to their names; hover over the icon to see a description or menu of options.

If you do not see a supplier that you would like to include in the invitation, click on *Add Suppliers*, perform a search, add the supplier by clicking the check box next to name and select *Save Selections*.

Use the *[Check All]* or *[Uncheck all]* link to select/add all the suppliers to select suppliers or deselect them for the email invite. Suppliers not invited will still be able to respond to the solicitation.

Use the scroll bar to navigate to the bottom of the screen or use the *END* key. Click *Next Step* to move to the *Summary* section. **[DEMO]**



Formal Solicitations



Header Requirements Questionnaire Attachments Item Specs Suppliers Summary

Edit Formal Solicitation View : 691A - 2020_Training2_FormaSolicitationExample (For

Header Information

Contact	Geri-Lynne Gagne 450 Columbus Blvd Hartford CT, 06103 United States Tel: 860-713-5112 Fax: geri-lynn.gagne@ct.gov
Duration Dates	Start Date: January 12, 2021 at 7:00:00 AM EST End Date: January 19, 2021 at 2:00:00 PM EST
Title	2020_Training2_FormaSolicitationExample
Solicitation Type	Invitation to Bid (ITB)
Evaluation Type	Single Envelope
Who can see this bid?	Everyone
Who can respond to this bid?	All Vendors
Estimated Total Value	
Description	Training courses using PowerPoint and live demonstrations
Justification	N/A
Justification Attachments	
Restricted Access	No
Solicitation Categories	<ul style="list-style-type: none">Management and Business Professionals and Administrative Services (800...Education and Training Services (86000000)
Delivery Terms	Free On Board Destination
Payment Terms	Vendor Specified
Custom Fields	
Created By	

* This Solicitation has no custom header fields defined

Environment

View Audit Detail Done Previous Step Submit Approval Preview

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The *Summary* provides the opportunity to review your solicitation entries. If the information is correct, you may select *Submit* to post to the bid board at the start date and time you entered on the header. If your organization has established approval workflow, *Submit* will send the solicitation for review and approval.

If the information requires a change you must select *Previous Step* to move backwards through each section until you get to the page you want, you will then have to click *Next Step* on each page to return to the Summary page to select *Submit*.

It is more efficient to select the *Done* button when you finish your entries. This will save the solicitation and allow you more freedom through the Edit functionality to move to any section in any order. After completing your change to a section you will select *Save* and must click the *Summary* page in the top ribbon to access that page to then select *Submit*. [DEMO]



Formal Solicitations



Supplier Invitation List	
	Awesome Supplier
	Behavioral Health Consultants, LLC
	Best Supplier
	Bilingual Professional Agency, Inc.
	Bluth Company
	CJC Test Enterprise
	Colin Erhardt Test Vendor
	Colin Vendor April Test
	Crash Test Dummies
	Dashing Supplier
	Dennison Lubricants

On the *Summary* page, the *Supplier Invitation List* displays the suppliers' status. The green check mark indicates that the supplier has been vetted and approved to do business with the State of Connecticut. The purple question mark indicates the vendor has not been approved and cannot be awarded until the supplier is in approved status. It also allows for one more opportunity to view other details on the supplier's profile. **[DEMO]**



Formal Solicitations



10000 - 10000 - 10000 / EXTENSIVE - DUALIST

webprocure-stage.perfect.com says

Your pre-issue solicitation request will be submitted for an approval.
Please click OK to submit.

OK Cancel

Materials Testing L
Service, Inc.
olet, Inc
Care Services, LLC
Table 1

When ready to submit the solicitation, click *Submit*. Click *OK* or *Cancel*. The solicitation will either be sent to approval workflow or to the bid board. **[DEMO]**



Formal Solicitations



Un-Issued Solicitations Active Solicitations

Solicitations #	Title	Buyer	Start Date	End Date	Status	Actions
711	Test Solicitation	T Buyer1	November 20, 2020 at 7:00:00 AM EST	November 27, 2020 at 2:00:00 PM EST	Approved	⋮

Displaying: 1-1 / 1

<< < 1 > >>

Hitting *Submit*, changes the solicitation status to *Approved*. Based on the solicitation's start date and time, the solicitation will post and email invitations will be sent to the suppliers. **[DEMO]**



Formal Solicitations



State of Connecticut

Solicitations Contracts Approval Analytics Vendors Admin

New Formal Solicitations
Create
View Current
Review / Award
View Archived

Informal Solicitations
Create
View Current
Review / Award
View Archived

Solicitation Import
Solicitation Search (New)

My Links
Add New Link

CTsource Training 2 Formal/Informal Manage Evaluate Award 31

Should you have exited the solicitation (clicked *Done* or *Save* or *Close*) so that you can continue at a later time, locate the solicitation from the *View Current* Formal Solicitation screen.

From the Solicitation dropdown menu, select *View Current*. The Current Formal Solicitation screen will populate.

[DEMO]



Formal Solicitations



Current Formal Solicitation

Organization: State of Connecticut | User: --All-- | Start Date From: | Start Date To: | End Date From: | End Date To: | Filter Solicitation | Reset

Un-Issued Solicitations | Active Solicitations

Solicitations #	Title	Buyer	Start Date	End Date	Status	Actions
675	BEP Test	A Monroe	November 16, 2020 at 7:30:00 AM EST	November 16, 2020 at 7:35:00 AM EST	Not Submitted	⋮
660	Coim Test	C Elhardt	November 16, 2020 at 12:00:00 AM EST	November 23, 2020 at 7:00:00 AM EST	Not Submitted	⋮
6635	h4yPk	T Costanzo	November 16, 2020 at 12:00:00 AM EST	November 23, 2020 at 7:00:00 AM EST	Not Submitted	⋮
688	RFP Test	L Pecorello-Hills	November 16, 2020 at 10:00:00 AM EST	November 16, 2020 at 12:30:00 PM EST	Awaiting Approval	⋮
690	Pre-Placement Physicals	A Watson-Paulin	November 16, 2020 at 12:00:00 PM EST	November 23, 2020 at 7:00:00 PM EST	Not Submitted	⋮
691	2020_Training_FormalSolicitationSample	L Rolik	November 16, 2020 at 12:00:00 PM EST	November 23, 2020 at 12:00:00 PM EST	Not Submitted	⋮
777	sluP	T Costanzo	November 16, 2020 at 12:00:00 PM EST	Now	Not Submitted	⋮
87	xx	D Rose	November 16, 2020 at 12:00:00 AM EST	Now	Not Submitted	⋮
BU-001	Food Delivery	E Orinavi	November 16, 2020 at 8:30:00 AM EST	Now	Not Submitted	⋮

Solicitation 691

- ✓ Edit
- ⊗ Retract / Cancel
- ⊗ Submit for Pre-Issue Approval
- ⬇ Download Solicitation Documents
- Send Supplier Message
- 🔍 View Audit Detail
- 📄 Copy Solicitation
- 🖨 Print Solicitation

Enter search criteria and click *Filter Solicitation*. Under *Un-Issued Solicitations*, find the solicitation for which you would like to edit. Click in the *Actions* column (three vertical dots) at the far right of the solicitation line. Select *Edit* from the *Actions* pop-up. [DEMO]



Formal Solicitations



state/ct?bt=1&force=true

webprocure-stage.perfect.com says

Changing an approved Solicitation will require you to re-submit the Solicitation to the pre-issue workflow.
Please confirm if you would like to proceed and make changes to the Solicitation

OK **Cancel**

Current Formal Solicitation

Organization: State of Connecticut

Title: 2020

Solicitation Number: -- All --

End Date From: Select Date

End Date To: Select Date

Start Date To: Select Date

Filter Solicitation

NOTE: If the solicitation has already been approved, you will be notified that changing an approved solicitation will require you to re-submit the solicitation through the pre-issue workflow. If the solicitation has already posted, any change made will result in an addendum to the solicitation. Posted solicitations will not be found under the *Un-Issued Solicitation* section.



Formal Solicitations



Edit Header Edit Requirements Edit Questionnaire Edit Documents Edit Item Specs Edit Suppliers **Summary**

Edit Formal Solicitation View : 691 - 2020_Training2_FormalSolicitationExample (Formal)

Click the Edit button to edit the corresponding section of Formal Solicitation 691. You may also use the sub-navigation bar above to edit each section.

Header Information

Sub-organizations are not invited to participate in bid.

Contact	DAS Procurement Services 450 Columbus Blvd Hartford CT, 06103 United States Tel: 402-326-4024 Fax: procurementservices@das.ct.gov
Duration Dates	Start Date: November 16, 2020 at 12:00:00 PM EST End Date: November 23, 2020 at 7:00:00 PM EST
Title	2020_Training2_FormalSolicitationExample
Solicitation Type	Invitation to Bid (ITB)
Evaluation Type	Single Envelope
Who can see this bid?	Everyone
Who can respond to this bid?	All Vendors
Estimated Total Value	
Description	Training courses using PowerPoint and live demonstration

Delete View Audit Detail Submit Close Copy Print Approval Preview

CTsource Training 2

Formal/Informal

Manage

Evaluate

Award

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Notice how in the solicitation navigation bar, *Summary* is highlighted. You may return to any section within the solicitation to edit the information whether that is to *Edit Header*, *Edit Requirements*, *Edit Questionnaire*, *Edit Documents*, *Edit Item Specs*, or *Edit Suppliers*.

The *Summary* page options also change under *Edit* mode. Notice the *Delete*, *Copy* and *Print* buttons are now available if needed.



Informal Solicitations



For Informal Solicitations.

We can follow the same process as when we created the Formal Solicitation. Remember, the formal solicitation has functionality to enforce the Sealed Bid requirement. This means that a solicitation cannot be awarded and supplier responses cannot be viewed prior to the End Date and Time set up for that solicitation.

From the *Solicitations* dropdown menu, find and select *Create*.

[DEMO]



Informal Solicitations



Header Requirements Questionnaire Attachments Item Specs Suppliers Summary

Informal Solicitation Header Information

Number *
113

Title *

Solicitation Type
Request for Quotation (RFQ)

Who can see this bid?
Everyone

Who can respond to this bid?
All Vendors

Calculate Estimated Total Value from Sum of Estimated Line Item Total Price : No

The *Informal Solicitation Header Information* window opens.

NOTE: If you wanted to do a quick informal solicitation Request for Quotation, you can quickly ask suppliers to respond and not “publicly” invite them. This is an invite only process. **[DEMO]**

This is also the process used when creating a quotation off of a master contract which will be demonstrated in Training #3.



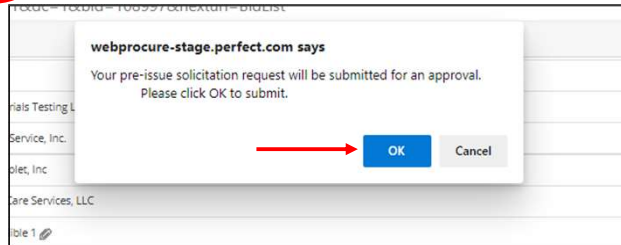
Informal Solicitations



* Warning: Incomplete Informal Solicitations, which do not contain items or suppliers or contacts, will not be issued when the Solicitation start date and time is reached. Solicitations that have been designated as containing no line items will be issued provided there are suppliers and contacts assigned.

* Warning: Incomplete Informal Solicitations, which do not contain items or suppliers or contacts, can not be submitted to the pre-issue workflow. Solicitations that have been designated as containing no line items can be submitted provided there are suppliers and contacts assigned.

Delete View Audit Data **Submit** Close Copy Print Approval Preview



CTSource Training 2

Formal/Informal

Manage

Evaluate

Award

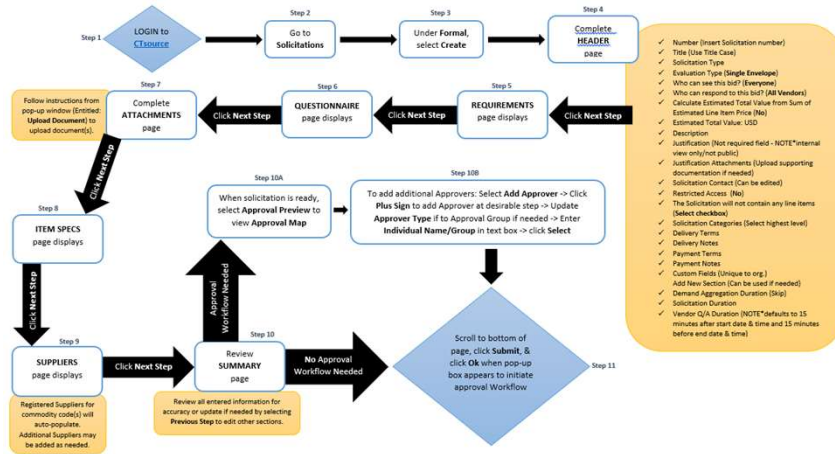
37

Once all of information for the solicitation have been made and any edits have been completed, click *Submit*. WebProcure will ask you to confirm: click *OK*.

If there is an approval workflow, the solicitation will go through the approval process. The solicitation will automatically post and become active based on the start date/time you selected for the *Solicitation Duration*. **[DEMO]**



Formal/Informal Solicitations



To create a solicitation, follow the process steps as captured in this process flow.



Questions & Answers



- Please use the Q&A function at the bottom of the screen to continue asking questions.
- We will answer as many questions as we can during the time we have allowed for this segment.
- All questions and answers will be posted on our website for future reference, so please be sure to go to <https://portal.ct.gov/DAS/CTSource/CTSource>



Manage Solicitations



State of Connecticut

State of Connecticut

Solicitations Contracts Approval Analytics Vendors Admin

News and Information!

Welcome to WebProcure!!

State of CT Bid Board Stage Link:

<https://webprocure-stage.perfect.com/wp-web-public/en/#/bidboard/search?searchterm=&customerid=51>

State of CT Contract Board Stage Link:

<https://webprocure-stage.perfect.com/wp-web-public/en/#/contractboard/search?searchterm=&customerid=51>

My Links

Add New Link

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To ensure the solicitation has posted, return to the home screen, and click the link to the State of CT Bid Board Stage Link (In the production environment, this is the Solicitation Public Board). **[DEMO]**



Manage Solicitations



The screenshot displays the 'Bid Board' interface. At the top, there is a search bar and a dropdown menu for sorting by 'Relevance'. On the left side, there are four filter panels: 'Status' (with options like Closed, Awarded, Under Evaluation, Cancelled/Retracted, Open), 'Bid Types' (with various procurement types like Invitation to Bid, Request for Proposal, etc.), 'Commodities (50)', and 'Organization (3)'. The main area shows a list of '188 Matching Solicitations Found' with details for each, including solicitation numbers, descriptions, start and bid dates, and the issuing organization.

The Bid Board will open and you may search for a solicitation filtering by the following: Status, Bid Types, Organization or Commodities. Use the **filters** on the left panel to assist you in your search OR if you know the name of the solicitation, you may enter it in the **Search** field. You may also search by **Relevance**. You may **Clear filter** when you would like to start filtering anew. **[DEMO]**



Managing Solicitations



The screenshot displays the CT SOURCE web application interface. At the top, there is a navigation bar with the following menu items: Home, Solicitations, Contracts, Approval, Analytics, Vendors, and Admin. The 'Solicitations' dropdown menu is open, showing options for Formal and Informal Solicitations, including Create, View Current, Review / Award, and View Archived. The 'Solicitation Search (New)' option is highlighted with a red circle. Below the navigation bar, there is a 'My Links' section with an 'Add New Link' button. The bottom of the page features a footer with the text 'CTsource Training 2' and a series of buttons: 'Formal/Informal', 'Manage' (highlighted in green), 'Evaluate', and 'Award'. The page number '42' is visible in the bottom right corner.

Another way to search is by utilizing the *Solicitation Search (New)*. This may be a more efficient way to search if you are uncertain the status of the solicitation or if you are an Inquiry Only User. **[DEMO]**



Managing Solicitations



The screenshot shows the 'Solicitation Search' page. At the top, there's a search bar with 'Search by keyword' and a 'Search' button. To the right are dropdowns for 'Organization' and 'Buyer Name', and a 'Reset' button. Below the search bar is a left sidebar with filter sections: 'Applied Filters' (No filters applied), 'Bid Type' (Formal Solicitations: 201, Informal Solicitations: 81), 'Status' (Under Evaluation: 174, Not Submitted: 105, Finalize: 44, Finalized: 21, Awaiting Approval: 16, Canceled/Retracted: 14, Active: 5, New Round Created: 3), and 'Solicitation Type' (Invitation to Bid: 216, Request for Proposal: 41, Request for Quotation: 30, Construction - Invitation to Bid: 25). The main area shows a list of solicitations, including 'BI-2B-2020-ARC-RFP | Step Two - Big Building Project - Consultants Fee Proposal' and 'YPO13850-102 | YPO13850-102 DCS Build'. The bottom navigation bar has buttons for 'Formal/Informal', 'Manage', 'Evaluate', and 'Award'.

The *Solicitation Search* page will open. Apply filters in the left panel and or apply search criteria and click *Search*. You may start your search anew by clicking on *Reset*.
[DEMO]

Hover over icons and symbols to identify their meaning. Click on the appropriate icon in lieu of using the action button; icons appear above the solicitation number and title when your cursor hovers the area.

The options available are subject to role permissions.



Manage Solicitations



State of Connecticut

Solicitations Contracts Approval Analytics Vendors Admin

New Formal Solicitations
Create
View Current
Review / Award
View Archived

Informal Solicitations
Create
View Current
Review / Award
View Archived

Solicitation Import
Solicitation Search (New)

My Links
Add New Link

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As mentioned, solicitations will post once they are approved and as the date/time is specified in the *Solicitation Duration*. At the home screen, to select *View Current* from the *Solicitations* dropdown menu.

[DEMO]



Manage Solicitations



Current Formal Solicitation

Organization: State of Connecticut | User: --All-- | Start Date From: | Start Date To: | End Date From: | End Date To: | Enter Solicitation | Reset

Un-issued Solicitations | Active Solicitations

Solicitation #	Title	Buyer	Start Date	End Date	Status	Actions
Core	SEE	G Gagne	November 16, 2020 at 1:00:00 AM EST	November 23, 2020 at 8:13:00 AM EST	Not Submitted	⋮
EAP-RFP Test	EAP-RFP Test	L Peceullo-Hits	November 16, 2020 at 12:00:00 PM EST	November 23, 2020 at 7:00:00 PM EST	Not Submitted	⋮
GGFDWFL	Workflow	G Gagne	November 16, 2020 at 12:00:00 PM EST	November 18, 2020 at 11:00:00 AM EST	Awaiting Approval	⋮
ITB618	ITB WORKFLOW TEST	T Costanzo	November 16, 2020 at 2:00:00 AM EST	November 17, 2020 at 2:30:00 AM EST	Not Submitted	⋮
PR02000001	Procactis Test Solicitation	E Administrator	November 15, 2020 at 4:10:00 PM EST	November 16, 2020 at 4:00:00 PM EST	Not Submitted	⋮
TCFILE	ATTACHMENTS	T Costanzo	November 16, 2020 at 12:00:00 AM EST	November 17, 2020 at 7:00:00 AM EST	Not Submitted	⋮
learn-test	transmission	M Rivera	November 16, 2020 at 12:00:00 AM EST	November 23, 2020 at 7:00:00 AM EST	Not Submitted	⋮
Testing	Test	L Peceullo-Hits	November 16, 2020 at 7:00:00 AM EST	November 19, 2020 at 8:00:00 AM EST	Not Submitted	⋮

Displaying: 81-88 / 88

- Edit
- Retract / Cancel
- Submit for Pre-Issue Approval
- Download Solicitation Documents
- Send Supplier Message
- View Audit Detail
- Copy Solicitation
- Print Solicitation

The *Current Formal Solicitation* screen opens. Search for a solicitation by entering the appropriate information in the search fields. You will see solicitations that are not submitted, approved or (if using approval workflow) awaiting approval, rejected. You will also see the solicitations that have posted and are active. WebProcure defaults to showing the user *Un-issued Solicitations*. If you wanted to search for an active solicitations, click on *Active Solicitations*.

Once you locate the solicitation for which you are searching, you may select certain actions by clicking in the *Actions* column (the three vertical dots to the far right of the solicitation), and selecting from the options that populate in the Solicitation # window.

NOTE: *Copy Solicitation* is a great feature to use in the event you have a very similar solicitation to issue in the future. This functionality allows for you to copy the entire solicitation, making only those revisions for your solicitation, except it will not copy any modifications made to the *Requirements* page.

[DEMO]



Manage Solicitations



Un-Issued Solicitations Active Solicitations

Solicitations #	Title	Buyer	Start Date	End Date	Status	Actions
589	QJC Joint and Crack Seal of Bituminous C	C Capek	September 15, 2020 at 11:35:00 AM EDT	January 02, 2021 at 7:00:00 AM EST	Addendum Not Submitted	⋮
691	2020_Training2_FormalSolicitationExample	L Rollik	November 15, 2020 at 9:15:00 PM EST	November 15, 2020 at 9:15:00 PM EST	Active	⋮

Displaying: 1-2 / 2

- Create Addendum**
- Solicitation Vendor Activity Report
- Solicitation History
- Retract / Cancel
- Q&A Center
- Solicitation Pre-Issue Workflow Review
- Download Solicitation Documents
- Send Supplier Message
- View Audit Detail
- Copy Solicitation
- Print Solicitation

CTsource Training 2

Formal/Informal

Manage

Evaluate

Award

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Managing solicitations may include creating addenda, managing the Questions and Answers, etc. To create an addendum, locate the solicitation and select *Create Addendum* from the *Actions* menu for the solicitation. **[DEMO]**



Manage Solicitations



webprocure-stage.perfect.com says
You are creating an addendum to this Solicitation
Are you sure you want to proceed?

OK Cancel

Current Formal Solicitation

Organization: State of Connecticut
User: -- All --
Solicitation Number: [input field]
Start Date From: [Select Date]
Start Date To: [Select Date]
End Date From: [Select Date]
End Date To: [Select Date]

Filter Solicitation Reset

Un-issued Solicitations Active Solicitations

Solicitations #	Title	Buyer	Start Date	End Date	Status	Actions
589	G/C Joint and Crack Seal of Bituminous C.....	C Ceppek	September 15, 2020 at 11:35:00 AM EDT	January 02, 2021 at 7:00:00 AM EST	Addendum Not Submitted	⋮
691	2020_Training2_FormalSolicitationExample	L Rolik	November 15, 2020 at 9:15:00 PM PST	November 15, 2020 at 10:30:00 PM PST	Active	⋮

To create an addendum, locate the solicitation and select *Create Addendum* from the *Actions* for the solicitation. Click *OK*.



Manage Solicitations



Home Solicitations Contracts Approval Analytics Vendors Admin

Edit Header Edit Requirements Edit Questionnaire Edit Documents Edit Item Specs Edit Suppliers Summary

Edit Formal Solicitation View : 691 - 2020_Training2_FormalSolicitationExample (Formal)

Click the Edit button to edit the corresponding section of Formal Solicitation 691. You may also use the sub-navigation bar above to edit each section.

CTsource Training 2

Formal/Informal

Manage

Evaluate

Award

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Navigate to the solicitation section you wish to change. Once you have made appropriate changes, click *Save* at the bottom of the section. Return to *Summary*, and click *Submit*.

[DEMO]



Manage Solicitations



The screenshot shows a web application interface for managing solicitations. A central dialog box is open, displaying the following text: "Your Solicitation addendum will be published, and all suppliers that have viewed the Solicitation will receive a notification of the addendum. Please click OK to publish the addendum. Note: if your addendum only contains changes to the quantity allocation of one or more items (without changing the total quantity), changed estimated total and/or if you only added suppliers, then an internal addendum will be created and the suppliers will not be notified." Below the text are two buttons: "Cancel" and "OK". A red arrow points to the "OK" button. The background interface includes a sidebar with a tree view containing items like "Solicitation Overview [1 Field(s)]", "Solicitation Objectives [1 Field(s)]", "Solicitation Instructions [2 Field(s)]", "Solicitation Provisions [1 Field(s)]", "Solicitation Selection Criteria [1 Field(s)]", and "Submission of Responses to Invitation". Below the sidebar is a "Questionnaire" section with a red message: "This Solicitation has no questions defined".

WebProcure will prompt you to accept or cancel the addendum. Click *OK*.

[DEMO]



Manage Solicitations



CT:rac=create&did=109010

itation Overview [1 Fields(s)]
itation Objectives [1 Fields(s)]
itation Instructions [2 Fields(s)]
itation Provisions [1 Fields(s)]
itation Selection Criteria [1 Fields(s)]
mission of Responses to Invitation

webprocure-stage.perfect.com says
Are you sure you want to cancel this addendum?
Click OK to delete or cancel to ignore

OK Cancel

Edit

onnaire

CTSource Training 2

Formal/Informal

Manage

Evaluate

Award

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If you select *Cancel*, WebProcure will prompt you to confirm.



Manage Solicitations



Un-issued Solicitations Active Solicitations

Solicitations #	Title	Buyer	Start Date	End Date	Status	Actions
589	Q/C Joint and Crack Seal of Bituminous C.....	C Cepek	September 15, 2020 at 11:35:00 AM EDT	January 02, 2021 at 7:00:00 AM EST	Addendum Not Submitted	⋮
691	2020_Training2_FormalSolicitationExample	L Rolik	November 15, 2020 at 9:15:00 PM EST	November 15, 2020 at 9:15:00 PM EST	Active	⋮

Displaying: 1-2 / 2

- ☑ Create Addendum
- 📄 Solicitation Vendor Activity Report
- 🕒 Solicitation History
- ⊖ Retract / Cancel
- 🗨️ Q&A Center
- 🔄 Solicitation Pre-Issue Workflow Review
- 📄 Download Solicitation Documents
- Send Supplier Message
- 🔍 View Audit Detail
- 📄 Copy Solicitation
- 🖨️ Print Solicitation

CTsource Training 2

Formal/Informal

Manage

Evaluate

Award

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To view Questions received from suppliers, you may enter the *Q&A Center*.

NOTE: Based on your organization's procurement rules, you may determine for your organization how to use the Q&A functionality.

[DEMO]



Manage Solicitations



Solicitation - Contracts - Approval - Analytics - Vendors - Admin

Solicitation Q&A Center Vendor May Email Buyer Directly On

Ask a Questions

Q&A Center **Bulletin Board** Export as: [icon]

Showing 1-2 out of 2 posts

Crash Test Dummies 2 minutes ago
Supplier Testgir's question is this one. 1
Not Published

Dawn Test 2Much 4 minutes ago
Why this solicitation? 1
Not Published

691 - 2020_Training2_FormalSolicitationExample
Training courses using PowerPoint and live demonstrations.

Bid Type Formal / ITB

Duration Dates November 15, 2020 at 9:15:00 PM EST to November 16, 2020 at 2:00:00 PM EST

Vendor Q&A Duration Dates November 15, 2020 at 9:30:00 PM EST to November 16, 2020 at 1:30:00 PM EST

Agency Contact Details
450 Columbus Blvd Hartford CT, 06103 United States
Tel: +1-860-424-2000
Fax: +1-860-424-2000

CTsource Training 2 Formal/Informal Manage Evaluate Award 52

You will find the questions submitted by the suppliers. You may answer questions and answers on a rolling basis or you may save answers and publish all questions and answers at one time.

[DEMO]



Manage Solicitations



Solicitation Q&A Center

Ask a Questions

Q&A Center Bulletin Board Export as:

Showing 1-2 out of 2 posts

Crash Test Dummies 3 minutes ago
Supplier Testgirl's question is this one

Dawn Test 2Much 5 minutes ago
Why this solicitation?

Not Published

Ver 691 2021
Train demonstrations.

Bid Type
Duration Dates

Vendor Q&A
Duration Dates

Agency Contact
Details

CTsource Training 2 Formal/Informal Manage Evaluate Award 53

Click on the three vertical dots and select *Add Reply*, *Attachments*, *Send Mail to Vendor*.

[DEMO]



Manage Solicitations



Send Email ×

Email Id*

CC:

BCC:

Subject*

Message*

If you select *Send Mail to Vendor*, a *Send Email* box will open. Enter information and click *Send*.

[DEMO]



Manage Solicitations



The screenshot displays two overlapping windows from the Manage Solicitations interface. The background window shows a question from 'Crash Test Dummies' and a reply from 'State of Connecticut'. The foreground window, titled 'Publishing Questions', contains a table with the following data:

Select	Asked By	Question	Answer	Question/Answer Created On
<input checked="" type="checkbox"/>	Crash Test Dummies	Supplier Testgir's question is this one.	Response to Testgir's question.	Nov 18, 2020 / Nov 18, 2020

Red arrows indicate the flow of the process: one arrow points from the 'Save' button in the reply window to the 'Publish' button in the question window, and another arrow points from the 'Next' button in the 'Publishing Questions' window to the 'Next' button in the question window.

CTsource Training 2

Formal/Informal

Manage

Evaluate

Award

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Respond to the question you would like to publish. Click *Save*. Notice the response in the *Reply* window. The response will not publish unless you proceed.

Click *Publish* and the *Publishing Questions* window opens. Select what you would like to publish and click *Next*.

[DEMO]



Manage Solicitations



Publishing Questions

Publish To :
 Publish to All Vendors on solicitation in Portal
 Publish to public Bid Board

Would you like to issue an addendum or simply send out a notification?
 Notify Vendor via Email/Fax
 Create an Addendum with QSA. (Note: Selecting this option will attach an addendum document to the solicitation that is visible to the public.)

Publishing Questions

Are you sure you want to proceed? This action cannot be undone.

Publish To :
 Publish to All Vendors on solicitation in Portal
 Publish to public Bid Board

Would you like to issue an addendum or simply send out a notification?
 Notify Vendor via Email/Fax
 Create an Addendum with QSA. (Note: Selecting this option will attach an addendum document to the solicitation that is visible to the public.)

WebProcure will prompt you to answer. Answer and click *Publish Now*.

WebProcure will ask you if you are sure you want to proceed. Click *Yes*.

[DEMO]



Manage Solicitations



The screenshot displays the 'Manage Solicitations' interface. At the top, there is a navigation bar with tabs for Solicitation, Contracts, Approval, Analytics, Vendors, and Admin. Below this, the 'Solicitation Q&A Center' is visible, with a sub-tab for 'Bulletin Board'. A red arrow points to the 'Bulletin Board' tab. To the right, the 'Solicitation Bulletin Board' is shown, featuring a 'Post a message' section with a text input field (1,000 characters max) and a 'Post' button. A red arrow points to the 'Post' button. Below the input field, a post is displayed: 'Post: #1 1 minute ago Opening postponed', with another red arrow pointing to the text. The interface also includes a sidebar with bid details and a 'Vendor May Email Buyer Directly' toggle.

Inside the Q&A Center, you may also post information on the Bulletin Board for all CTsource suppliers to view. Click *Bulletin Board*. Type a message up to 1,000 characters in the box. Select *Post*.

[DEMO]



Manage Solicitations



Publishing Bulletin Board Posts

Select which posts you want to publish.

Select	Post	Created On
<input type="checkbox"/>	Opening postponed	Nov 16, 2020

Close Next

Please select at least one post before publish.

OK

Close Next

If you do not select the message to post, WebProcure will ask you to select at least one post before you click *Publish*.

[DEMO]



Manage Solicitations



WebProcure then asks you if you would like to *Notify Vendor via Email/Fax* or *Create an Addendum*. Click the appropriate method. Select *Publish Now*. WebProcure asks if you are sure you want to proceed. Click *Yes*. WebProcure will publish the message.

[DEMO]



Manage Solicitations



Un-issued Solicitations Active Solicitations

Solicitations #	Title	Buyer	Start Date	End Date	Status	Actions
589	CJC Joint and Crack Seal of Bituminous C	C Cepek	September 15, 2020 at 11:35:00 AM EDT	January 02, 2021 at 7:00:00 AM EST	Addendum Not Submitted	⋮
691	2020_Training2_FormalSolicitationExample	L Rolik	November 15, 2020 at 9:15:00 PM EST	November 15, 2020 at 9:15:00 PM EST	Active	⋮

Displaying: 1-2 / 2

- Create Addendum
- Solicitation Vendor Activity Report
- Solicitation History**
- Retract / Cancel
- Q&A Center
- Solicitation Pre-Issue Workflow Review
- Download Solicitation Documents
- Send Supplier Message
- View Audit Detail
- Copy Solicitation
- Print Solicitation

CTSource Training 2

Formal/Informal

Manage

Evaluate

Award

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To view the history of the solicitation, select *Solicitation History*. [DEMO]



Manage Solicitations



Home Solicitations Contracts Approval Analytics Vendors Admin

Solicitation History

Solicitation Number: 691
Solicitation Title: 2020_Training2_FormalSolicitationExample
Start Date: November 15, 2020 at 9:15:00 PM EST
End Date: November 15, 2020 at 10:30:00 PM EST
Organization: State of Connecticut

Close

Select	Sol. No.	Ver. No.	Buyer	Status	Activation Date	Addendum Acceptance	Actions
<input type="checkbox"/>	691	Original	L Rolik	Amended	November 15, 2020 at 9:15:00 PM EST	N/A	⋮
<input type="checkbox"/>	691	Revision 01	L Rolik	Active	November 15, 2020 at 3:25:21 PM EST	No	⋮

Compare Versions

CTsource Training 2

Formal/Informal

Manage

Evaluate

Award

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The Solicitation History screen appears and you can see activities in the solicitation. If you would like to compare versions, you may select and click *Compare Versions*.

[DEMO]



Manage Solicitations



Solicitation History

Solicitation Number: 691
Solicitation Title: 2020_Training_2_FormalSolicitationExample
Start Date: November 15, 2020 at 9:15:00 PM EST
End Date: November 16, 2020 at 12:45:00 PM EST
Organization: State of Connecticut

Close

Select	Sol. No.	Ver. No.	Buyer	Status	Activation Date	Addendum Acceptance	Actions
<input type="checkbox"/>	691	Original	L Rolik	Amended	November 15, 2020 at 9:15:00 PM EST	N/A	⋮
<input type="checkbox"/>	691	Revision 01	L Rolik	Amended	November 15, 2020 at 3:25:21 PM EST	No	⋮
<input type="checkbox"/>	691	Revision 02	L Rolik	Amended	November 15, 2020 at 3:25:21 PM EST	No	⋮
<input type="checkbox"/>	691	Revision 03	L Rolik	Active	November 15, 2020 at 3:48:55 PM EST	No	⋮

Compare Versions

Note: A red circle highlights the vertical dots in the Actions column for Revision 02, with a dropdown menu showing options: Addendum Details Report, Print Solicitation, and View Audit Detail.

To view specifics within a revision to the solicitation, click in the *Actions* column (the three vertical dots). Select *Addendum Details Report*.

[DEMO]



Manage Solicitations



Solicitations | Contracts | Approval | Analytics | Vendors | Admin

Addendum Details Report

Solicitation Number: 691
Type: Formal Solicitation
Duration: Start Date: Nov 15, 2020 9:15 PM EST End Date: Nov 16, 2020 12:45 PM EST

Header Information

Field Name	Previous Value	New Value
End Date	Nov 15, 2020 10:30 PM EST	Nov 16, 2020 12:45 PM EST
Vendor Q/A End Date	11/16/20 02:45 AM	11/16/20 05:00 PM

Solicitation Fields

There are no changes under this section.

Solicitation Questionnaire

There are no changes under this section.

Documents Added

There are no changes under this section.

Solicitation Group Changes

The *Addendum Details Report* provides information regarding that revision. Suppliers have a similar feature on their side of the WebProcure application.

[DEMO]



Questions & Answers



- Please use the Q&A function at the bottom of the screen to continue asking questions.
- We will answer as many questions as we can during the time we have allowed for this segment.
- All questions and answers will be posted on our website for future reference, so please be sure to go to <https://portal.ct.gov/DAS/CTSource/CTSource>



Evaluate Responses



The screenshot displays the CT SOURCE web application interface. At the top, there is a navigation bar with the following menu items: Home, Solicitations, Contracts, Approval, Analytics, Vendors, and Admin. The 'Solicitations' dropdown menu is open, showing options: Formal Solicitations (Create, View Current, Review / Award, View Archived), Informal Solicitations (Create, View Current, Review / Award, View Archived), Solicitation Import, and Solicitation Search (New). The 'Review / Award' option is circled in red. Below the navigation bar, there is a 'My Links' section with an 'Add New Link' button. At the bottom of the page, there is a footer with the text 'CTsource Training 2' and a series of buttons: 'Formal/Informal', 'Manage', 'Evaluate' (highlighted in green), and 'Award'. The page number '65' is visible in the bottom right corner.

The evaluation process is only available after the bid has closed. You may begin the process from the Solicitations dropdown menu, select *Review/Award*. This option is also available under the *Solicitation Search (New)* feature.

[DEMO]



Evaluate Responses



Formal Solicitations that have ended and awaiting evaluation or awarded.

Solicitations #	Title	Buyer	End Date	Status	Actions
17	Greg Test	G Mooney	Feb 13, 2020, 7:00:00 AM	Under Evaluation	⋮
17PSX0127	Joint and Crack Sealing of Bituminous Co...	G Gagne	Jun 20, 2020, 8:00:00 AM	Under Evaluation	⋮
180	Face Shields	K DiMatteo	Jun 01, 2020, 8:00:00 AM	Under Evaluation	⋮
180314	promotional items	M Rivera	Aug 15, 2020, 7:00:00 AM	Under Evaluation	⋮
182	Face Shields	E Orlinski	May 26, 2020, 8:00:00 AM	Under Evaluation	⋮
19	Hot Fudge Sundae	G Gagne	Feb 13, 2020, 7:00:00 AM	Under Evaluation	⋮
19PSX00000	Temporary Employment Services - Business...	L Peccerillo-Hills	Oct 11, 2020, 10:30:00 AM	Under Evaluation	⋮
19PSX0261	Bituminous Concrete Materials and Bridge...	Y Osser	Sep 02, 2020, 10:30:00 AM	Under Evaluation	⋮
19PSX0279	Vending Program - Test	L Peccerillo-Hills	Jun 23, 2020, 10:30:00 AM	Under Evaluation	⋮
20	EMO testing bid	E Orlinski	Jun 18, 2020, 8:00:00 AM	Under Evaluation	⋮

Displaying: 11/20 / 110

- ⊗ Evaluate Supplier Responses
- ⊗ Solicitation Vendor Activity Report
- ⊗ Solicitation History
- ⊗ Cancel Solicitation
- ⊗ Q&A Center
- ⊗ Award Report
- ✎ Modify Published Award Report
- ⬇ Download Solicitation Documents
- Send Notification to Suppliers
- ⊗ View Audit Detail
- ⊗ Copy Solicitation
- ⊗ Print Solicitation

Search for and locate the solicitation to evaluate. Select *Evaluate Supplier Responses*.

You may elect at this time to produce bid opening results to post on the website if required by your organization's procurement rules. Different steps are necessary to complete this process depending whether or not your solicitation contains line items. See slides 85-87 for more details.

[DEMO]



Evaluate Responses



Evaluate and Award : 19PSX00000 - Temporary Employment Services - Business and Administrative Positions (Formal)

In order to include paper responses to Formal Solicitation received from suppliers outside the system, please select the Paper Response option below.

Enter Suppliers' Paper Responses

Upload paper responses received outside the system.

Paper Response

Review and score supplier responses to questions.

Score Questions

Provide numeric score to supplier responses to be used in the evaluation process.

Review and Score Questions

Review supplier responses to the requirements.

Review Requirements

Review supplier responses for the Requirements.

Review Requirements

Select the award method from the options listed below and review the supplier documents.

Select Award Method

Review and/or download documents and attachments submitted by suppliers as part of their response.

Review Vendor Documents

Awarding By Item allows the evaluation and comparison of vendor responses at the item level. Line item delivery information is available utilizing this option.

Award By Item

[Continue](#) [Manage Evaluation Committee](#) [Support/Help](#) [Cancel](#)

CTSource Training 2

Formal/Informal

Manage

Evaluate

Award

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For *Evaluate and Award*, you have the opportunity to review the summary of suppliers' responses under *Questionnaire* and *Requirements* sections, and review submitted suppliers' documents.



Evaluate Responses



Select the award method from the options listed below and review the supplier documents.

Select Award Method

Review and/or download documents and attachments submitted by suppliers as part of their response.

Review Vendor Documents

Select the vendor(s) to which you would like to award this Solicitation.

Award

Continue

Manage Evaluation Committee

Cancel

CTsource Training 2

Formal/Informal

Manage

Evaluate

Award

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You may review and download documents submitted by suppliers by selecting *Review Vendor Documents*. Click *Continue*.

[DEMO]



Evaluate Responses



Review supplier list and any document attachment submitted by suppliers for bid: 121920

Evaluation Notes

Supplier	Attachments	Actions
Awesome Supplier (49%)	Quote 1	⋮
Best Supplier (53%)	Quote 1	⋮
Candid Supplier (n/a)	Quote 1	⋮

Close

CTSource Training 2

Formal/Informal

Manage

Evaluate

Award

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The *View Suppliers and Documents* window opens. View each suppliers attached response to determine award, then click *Close*. At this time, you may enter *Evaluation Notes*, however these notes are not editable and are permanent.

Under actions you may select *Recommend as Finalist*, this only applies if your organization has enabled the ability to create solicitation rounds (multi-round solicitations). This topic can be discussed at a later date if your organization would like to take advantage of this advanced functionality.

[DEMO]



Evaluate Responses



Evaluate and Award : 19PSX00000 - Temporary Employment Services - Business and Administrative Positions (Formal)

In order to include paper responses to Formal Solicitation received from suppliers outside the system, please select the Paper Response option below.

Enter Suppliers' Paper Responses

Upload paper responses received outside the system.

Paper Response

Review and score supplier responses to questions.

Score Questions

Provide numeric score to supplier responses to be used in the evaluation process.

Review and Score Questions

Review supplier responses to the requirements.

Review Requirements

Review supplier responses for the Requirements

Review Requirements

Select the award method from the options listed below and review the supplier documents.

Select Award Method

Review and/or download documents and attachments submitted by suppliers as part of their response.

Review Vendor Documents

Continue

Manage Evaluation Committee

Cancel

CTSource Training 2

Formal/Informal

Manage

Evaluate

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You may select *Manage Evaluation Committee* to establish your team, if applicable.

[DEMO]



Evaluate Responses



Home Solicitations Contracts Approval Analytics Vendors Admin

Select or enter individuals on the solicitation evaluation committee. Committee members will be granted external system access to selected solicitation evaluation materials via WebProcureDrive.

Teams Evaluation Materials Publish Summary

Enter Team Name +Add Team Team Members

Solicitation Teams

↓ Add External User Close Next

CTsource Training 2 Formal/Informal Manage Evaluate Award 71

You have the option of creating an Evaluation Team. You may add a *Team Name* and *Team Members*.

[DEMO]



Evaluate Responses



Teams Evaluation Materials Publish Summary

Enter Team Name

Training Evaluation Team

Team Member

Enter New Team Member

Solicitation Teams

Enter the name of the evaluation team. Click on *Add Team*.

[DEMO]



Evaluate Responses



Teams Evaluation Materials Publish Summary

Enter Team Name
Team Name

Team Members
Enter New Team Member

Solicitation Teams

Training Evaluation Team

CTsource Training 2

Formal/Informal

Manage

Evaluate

Award

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“Training Evaluation Team” appears below *Solicitation Teams*. Click on the icon to add people. You will now be able to enter team members in the *Team Members* field.

[DEMO]



Evaluate Responses



Select or enter individuals on the solicitation evaluation committee. Committee members will be granted external system access to selected solicitation evaluation materials via WebProcureDrive.

Teams Evaluation Materials Publish Summary

Enter Team Name
Team Name + Add Team

Team Members

Solicitation Teams
Training Evaluation Team

+ Add External User Jose Next

Enter team members in the *Team Members* field (only for CTsource users if the individual is not a user you must add an external user).

Enter a name and click *Add External User*.

[DEMO]



Evaluate Responses



External Team Member Information

First Name
First Name

Last Name
Last Name

Organization
Organization

Email address
Enter email

Save Close

External Team Member Information window opens. Enter member's information and click *Save*. (Or *Close* if you wish to exit.)

[DEMO]



Evaluate Responses



Select or enter individuals on the solicitation evaluation committee. Committee members will be granted external system access to selected solicitation evaluation materials via WebProcureDrive.

Teams Evaluation Materials Publish Summary

Enter Team Name
Team Name + Add Team

Team Members
Assistant Director Adams Q

Solicitation Teams	Team List	Team Member	Action
<input checked="" type="checkbox"/> Training Evaluation Team	<input checked="" type="checkbox"/>	Henderson, Director (Dept of XXXXXXXX) Adams, Asst Director (Dept of XXXXXXXX)	<input type="checkbox"/> <input type="checkbox"/>

↑ Add External User Close Next

Continue entering all members. When finished, click *Next*.

[DEMO]



Evaluate Responses



Select or email individuals on the solicitation evaluation committee. Committee members will be granted external system access to selected solicitation evaluation materials via WebShareOneDrive.

Teams Evaluation Materials Publish Summary

Select the solicitation documents below that will be accessible to evaluators

Available Files	Selected Files
<ul style="list-style-type: none"><input type="checkbox"/> Solicitation<input type="checkbox"/> Solicitation Summary Report<input type="checkbox"/> Buyer Attachments<ul style="list-style-type: none"><input type="checkbox"/> Header Level Attachments<ul style="list-style-type: none"><input type="checkbox"/> Solicitation_Condition_Quantifications_and_Requirements.pdf<input type="checkbox"/> Contract_Schedule_Template.docx<input type="checkbox"/> Contract.docx<input type="checkbox"/> Response Document<ul style="list-style-type: none"><input type="checkbox"/> Vendor Response Documents<input type="checkbox"/> Solicitation Audit<input type="checkbox"/> Solicitation Summary - Addenda<input type="checkbox"/> Bid List Report<input type="checkbox"/> Questionnaire Report	

Add Document

To upload a new document click on the Select Evaluation Documents. The Choose a File window will appear. Browse your computer to find the file you want to upload. Select the documents and click the Open button. Finally click the Upload button.

Select Evaluation Documents Upload

CTSource Training 2 Formal/Informal Manage Evaluate Award 77

Evaluation Materials window opens. Select all files for the team to evaluate.

[DEMO]



Evaluate Responses



Select the solicitation documents below that will be accessible to evaluators

Available Files	Selected Files
<ul style="list-style-type: none"><input checked="" type="checkbox"/> Solicitation<input checked="" type="checkbox"/> Solicitation Summary Report<input checked="" type="checkbox"/> Buyer Attachments<ul style="list-style-type: none"><input checked="" type="checkbox"/> Header Level Attachments<ul style="list-style-type: none"><input checked="" type="checkbox"/> Schedule_1_-_Position_Specifications_and_Requirements.pdf<input checked="" type="checkbox"/> Contract_Exhibit_Template.docx<input checked="" type="checkbox"/> Contract.docx<input checked="" type="checkbox"/> Response Documents<ul style="list-style-type: none"><input checked="" type="checkbox"/> Vendor Response Documents<input checked="" type="checkbox"/> Solicitation Audit<input checked="" type="checkbox"/> Solicitation Summary - Addenda<input checked="" type="checkbox"/> Bid tab Report<input checked="" type="checkbox"/> Questionnaire Report	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Solicitation<input checked="" type="checkbox"/> Buyer Attachments<ul style="list-style-type: none"><input checked="" type="checkbox"/> Header Level Attachments<ul style="list-style-type: none"><input checked="" type="checkbox"/> Schedule_1_-_Position_Specifications_and_Requirements.pdf<input checked="" type="checkbox"/> Contract_Exhibit_Template.docx<input checked="" type="checkbox"/> Contract.docx<input checked="" type="checkbox"/> Response Documents<ul style="list-style-type: none"><input checked="" type="checkbox"/> Vendor Response Documents<input checked="" type="checkbox"/> Solicitation Audit<input checked="" type="checkbox"/> Solicitation Summary - Addenda<input checked="" type="checkbox"/> Bid tab Report<input checked="" type="checkbox"/> Questionnaire Report

The files you select will populate in the *Selected Files* window on the right. Unselect check boxes under the *Selected Files* column for those files that do not need to be evaluated by the team.

[DEMO]



Evaluate Responses



Add Document

To upload a new document click on the Select Evaluation Documents. The Choose a File window will appear. Browse your computer to find the file you want to upload. Select the documents and click the Open button. Finally click the Upload button.

[Select Evaluation Documents.](#) [Upload](#)

[Previous](#) [Next](#)

If there are any additional documents that must be added to include in the evaluation, you have the option to *Select Evaluation Documents* and *Upload*. Click *Next*.

[DEMO]



Evaluate Responses



Teams Evaluation Materials **Publish** Summary

Solicitation Teams

Training Evaluation Team

Material Selected

- Solicitation
 - Buyer Attachments
 - Header Level Attachments
 - Schedule_1_-_Position_Specifications_and_Requirements.pdf
 - Contract_Exhibit_Template.docx
 - Contract.docx
 - Response Documents
 - Vendor Response Documents
 - Solicitation Audit
 - Solicitation Summary - Addenda
 - Bid tab Report
 - Questionnaire Report

Previous **Customize Email content** Publish

You may send a customized email to the evaluation team at this time.

[DEMO]



Evaluate Responses



Email

Subject: Solicitation Evaluation Committee Invitation

State of Connecticut's Lisa Rolik has invited you as an evaluator on the Evaluation Committee for Solicitation No.: 16PSX00000
Solicitation Title: Temporary Employment Services - Business and Administrative Positions
The link below is a unique access point for you to access evaluation materials. Click to Download Docs and evaluate.

Save

CTSource Training 2

Formal/Informal

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This is an example of what appears is the system-generated email that you may revise at this time. Click *Save*.

[DEMO]

CONNECTICUT
STATE OF ADMINISTRATION

Evaluate Responses

CT
SOURCE

Home Solicitations Contracts Approval Analytics Vendors Admin

Select or enter individuals on the solicitation evaluation committee. Committee members will be granted external system access to selected solicitation evaluation materials via WebProcureDrive.

Publishing Documents, Please wait ...

CTSource Training 2 Formal/Informal Manage Evaluate Award 82

Publishing Documents occurs and this may take a while depending on the number/size of documents.

The systems is flowing and compiling all the information into a zip file to be then emailed to the Evaluation Committee members.

[DEMO]



Evaluate Responses



Select or enter individuals on the solicitation evaluation committee. Committee members will be granted external system access to selected solicitation evaluation materials via WebProcureDrive.



Document published to Evaluation Committee successfully.

[Proceed](#)

CTSource Training 2

Formal/Informal

Manage

Evaluate

Award

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Once the document is published to the Evaluation Committee successfully, click *Proceed*. Once you click *Proceed*, the system generates and sends the email.

You will be returned to the Summary, click *Close*. Return home.

[DEMO]



Evaluate Responses



The screenshot displays the 'Solicitation Evaluation Management' interface. A 'Download Docs' link is circled in red. An 'Internet Explorer' window shows a list of downloaded files:

Name	Location	Actions
SED20201113-386.zip	webprocure-stage.perfect.com	Do you want to open or save this file? Open Save
Evaluate RFP Training Vid...mp4	url=1-content.ap.gov.microssoftstream.com	Open
Vendor Response and QA ...mp4	url=1-content.ap.gov.microssoftstream.com	Open
Create RFP Solicitation.mp4	url=1-content.ap.gov.microssoftstream.com	Open
3. Avaya one-X Communica...exe	Downloads	Downloads
3. Avaya one-X Communica...exe	Downloads	Downloads
2. Avaya One -x Software In...pdf	Downloads	Downloads

A file explorer window shows the contents of the 'SED20201113-386' folder:

Name	Type	Compressed size	Password p...	Size	Ratio	Date modified
Buyer Attachments	File Folder					
Buyer-Supplied Doc	File Folder					
Evaluation Docs	File Folder					
SolicitationSummaryReport_386FND	Adobe Acrobat Document	17 KB	Not	19 KB	11%	11/20/2020 3:31 PM

CTsource Training 2

Formal/Informal

Manage

Evaluate

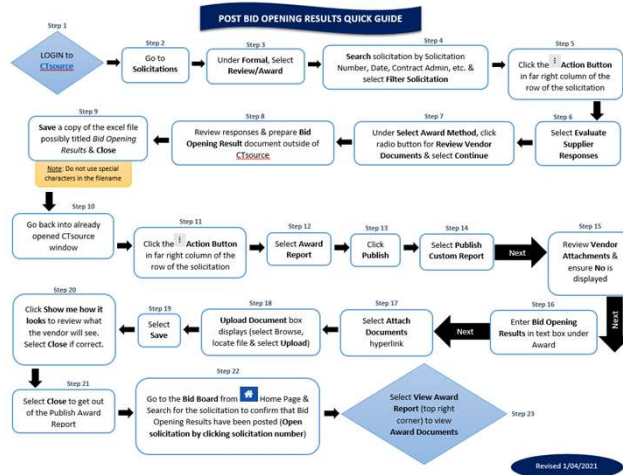
Award

84

The Evaluation Team member receives an email with a link to download documents. View download and open zip file. As you can see, the system summarizes the downloaded material for you into file folders. Miscellaneous documents will be listed outside of the folders. [DEMO]



Evaluate Responses



You may post bid opening results for solicitations without line items by producing your own summary document and post (or publish) it to the Bid Board. Follow the process steps in this flow chart to complete the task.



Evaluate Responses



Evaluate and Award : 19PSX00000 - Temporary Employment Services - Business and Administrative Positions (Formal)

In order to include paper responses to Formal Solicitation received from suppliers outside the system, please select the Paper Response option below.

Enter Suppliers' Paper Responses

Upload paper responses received outside the system.

Paper Response

Review and score supplier responses to questions.

Score Questions

Provide numeric scores to supplier responses to be used in the evaluation process.

Review and Score Questions

Review supplier responses to the requirements.

Review Requirements

Review supplier responses for the Requirements.

Review Requirements

Select the award method from the options listed below and review the supplier documents.

Select Award Method

Review and/or download documents and attachments submitted by suppliers as part of their response.

Review Vendor Documents

Award By Item

[Continue](#) [Manage Evaluation Center](#) [Export Bid Tab](#)

If a solicitation contains line items, an *Export Bid Tab* button is available on the Evaluate and Award page. CTsource will export the item response data into Excel to create a workbook to summarize a Bid Tab to be posted to the Bid Board.



Evaluate Responses



Total Award Summary

BidTabReport.xlsx

[Open file](#)

Vendor Name	Substitution Contact Name	Substitution Contact Email	Substitution Contact Phone
Crack Tech Supplies	Dawn M. Stone	dstone@cracktechsupplies.com	860-438-0800

CTSource Training 2

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Evaluate

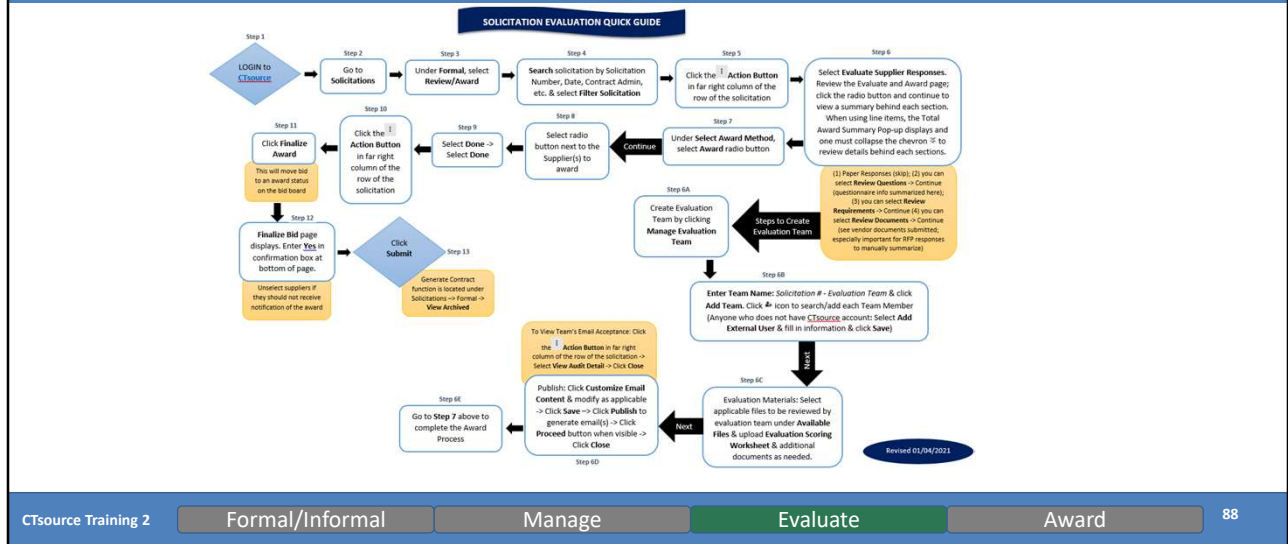
Award

87

This slide displays a sample of *Export Bid Tab* results. If you choose to utilize the Item spec functionality in the future, this bid tab report provides various summaries of the vendors' responses for you to choose from or use all of them. This is a great feature if your organization is required to provide this level of detail.



Evaluate Responses



The slide above details the process steps to evaluate and award solicitation responses.



Questions & Answers



- Please use the Q&A function at the bottom of the screen to continue asking questions.
- We will answer as many questions as we can during the time we have allowed for this segment.
- All questions and answers will be posted on our website for future reference, so please be sure to go to <https://portal.ct.gov/DAS/CTSource/CTSource>



Award



Select the award method from the options listed below and review the supplier documents.

Select Award Method

Review and/or download documents and attachments submitted by suppliers as part of their response.

Review Vendor Documents

Select the vendor(s) to which you would like to award this Solicitation.

Award ←

→

To *Award* select radio button and click *Continue*. **[DEMO]**



Award



Award : 010520 - Training II Evaluate Responses (Formal)

Do not Award now Award to Multiple Suppliers

Evaluation Notes

	Awesome Supplier (49%) ✓	Best Supplier (53%) ✓	Candid Supplier (n/a) ✓	Excellent Supplier (n/a) ✓
Document #				
Award	<input type="checkbox"/> Award <input type="checkbox"/> Recommend as Finalist	<input type="checkbox"/> Award <input type="checkbox"/> Recommend as Finalist	<input type="checkbox"/> Award <input type="checkbox"/> Recommend as Finalist	<input type="checkbox"/> Award <input type="checkbox"/> Recommend as Finalist
Company Information				
Detail full name and title of the Individual le...	Jane Smith, President	John Smith, CEO	Charlie Brown, Vice President	Sarah Martin, Owner
Is your company a micro-business or Veteran's o...	None	Micro-Business	Veteran's Owned Micro-Business	None
If you are a state employee, what is your posit...	N/A	N/A	N/A	N/A

Done Close

Select the check box for the supplier to award. If awarding to more than one supplier, select check box *Award to Multiple Suppliers*, then select the suppliers to award.

Then click *Done*.

[DEMO]





Award



Awarded Responses All Responses

Awarded Formal Solicitation Winners

No.	Supplier
1.	Awesome Supplier  

 Awarded

Evaluation Notes Download Print **Done**



Click *Done* when ready to move forward and finalize the award.

Finalizing the award will change the solicitation status on the bid board to *Awarded*. You can elect to send notifications to all suppliers if you choose. You may also post award information if you choose.

[DEMO]



Award



Formal Solicitations that have ended and awaiting evaluation or awarded.

Solicitations #	Title	Buyer	End Date	Status	Actions
121920	Training 1 Demo	G Gagne	Dec 19, 2020, 11:00:00 AM	Under Evaluation	

Displaying: 1-1 / 1

- Solicitation 121920
- Evaluate Supplier Responses
 - Solicitation Vendor Activity Report
 - Finalize Award**
 - Solicitation History
 - Cancel Solicitation
 - Q&A Center
 - Award Report
 - Modify Published Award Report
 - Download Solicitation Documents
 - Send Notification to Suppliers
 - View Audit Detail
 - Copy Solicitation
 - Print Solicitation

CTSource Training 2

Formal/Informal

Manage

Evaluate

Award

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Select *Finalize Award* from the actions window of the solicitation.

[DEMO]

Award

Finalize Bid : 121920 - Training 1 Demo (Formal)

Before finalizing the award to Bid 121920 you may create and send a customized award email notification, along with a document attachment, to select vendors by selecting the **Create Notification** button below. Select **Cancel** if you do not wish to continue with the award finalization process at this time. Please Note: It is recommended that you have your document attachments ready before electing to create the notification.

Create Notification **Publish** **Cancel**

Please select the vendors who will receive the standard award notification. The list contains *only* the vendors that viewed or bid on the Solicitation. If you have done a custom notification using "Create Notification" above, you may consider unchecking all the vendors below.

Select Vendors to Notify

[Check All] [Uncheck All]

Select	Supplier	Awarded
<input checked="" type="checkbox"/>	Awesome Supplier (49%) Quote 1	Awarded
<input checked="" type="checkbox"/>	Candid Supplier (n/a) Quote 1	Responded

When you are ready to finalize the award, please type the word "Yes" in the confirmation box at the bottom of the screen and click "Submit"

Confirmation:

Submit

CTSource Training 2 Formal/Informal Manage Evaluate **Award** 94

Prior to finalizing this process, you may send a notification. The system will automatically send a generic email stating the solicitation has been awarded or you can create a customized notification via the *Create Notification* button. If you choose not to send a notification, select *Uncheck All*. You may also choose to publish the information to the Bid Board via the *Publish* button.

When ready to finalize, enter *YES* in the *Confirmation* box. Click *Submit*.

This will move the solicitation to the Award status and the solicitation document can be found under *Solicitations – View Archived*

[DEMO]



Award



Finalize Bid : 121920 - Training 1 Demo (Formal)

Bid 121920 is now in finalized status. Click on Past Bid to view awarded items.

 [Publish](#) [Close](#)

CTsource Training 2

Formal/Informal

Manage

Evaluate

Award

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Click *Publish* or *Close*. **[DEMO]**

Note: DAS does not publish award information due to the fact that the fully executed published contract is considered the award.



Award



Publish Award Report : 691 - 2020_Training2_FormalSolicitationExample (Formal)

Status: Not published

Show me how it looks

Select a Publish Action Vendor Attachments Award Notes Award Attachments

Supplier	Awarded Bid Total
Dawn Test 2M/uch	\$87,500.00
Crash Test Dummies	\$0.00

Publish

- Do NOT publish
- Publish All Responses
- Publish Only Awarded Responses
- Publish Custom Report

Next Close

Posting some information on the Public Bid Board is at your organization's discretion. If you wish to publish the award or bid tab to the bid board, use this functionality.

Notice that the *Show me how it looks* button is not activated at this time. You will need to go through the publishing process first.

Choose from the *Publish* menu how you would like to proceed. Click *Next*.

[DEMO]



CTSource Training 2 Formal/Informal Manage Evaluate **Award** 97

Choose whether to *Display any attachments provided by the responding suppliers*.
Click *Next*.

[DEMO]



Publish Award Report : 121920 - Training 1 Demo (Formal)

Status: Not published

Show me how it looks

Select a Publish Action Vendor Attachments **Award Notes** Award Attachments

B I S T Size **A**

Awarded Vendors:

- Awesome Supplier

Responded Vendors:

- Candid Supplier

Previous **Next** Close

It is recommended to include *Award Notes* based upon the information you choose to post. The system will provide notes but you may modify them or elect to delete them. Click *Next*.

[DEMO]



Award



Publish Award Report : 121920 - Training 1 Demo (Formal)

Status: Not published

Show me how it looks

Select a Publish Action

Vendor Attachments

Award Notes

Award Attachments

Document Name

Creation Date

Actions

Attach Documents

Previous Save Close

CTsource Training 2

Formal/Informal

Manage

Evaluate

Award

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You may determine to attach other related award documents by clicking the hyperlink and the upload documents window appears. Click *Save*.

[DEMO]



Award



Publish Award Report : 691 - 2020_Training2_FormalSolicitationExample (Formal)

Status: Published

[Show me how it looks](#)

Select a Publish Action Vendor Attachments Award Notes Award Attachments

CTsource Training 2

Formal/Informal

Manage

Evaluate

Award

100

Now the *Show me how it looks* button is activated. Click to see.

[DEMO]



Award



Formal Solicitation History Report for Formal Solicitation 121920

Solicitation Information	
No.	121920
Title	Training 1 Demo
Type	Formal Solicitation (TELERRANS)
Duration Dates	Start Date: Dec 18, 2020 10:00 AM EST End Date: Dec 18, 2020 11:00 AM EST Training 1 Demo for Bid/Solicitation Board in Stage
Description	Training 1 Demo for Bid/Solicitation Board in Stage
Delivery Terms	Free On Board Destination
Payment Terms	Vendor Specific
Contact	A Closure Training Entity GEM Lynne Gagne 400 Columbia Road Hartford CT, 06103 United States Tel: 860-713-5112 Fax: gem@lynne.gagne@ct.gov

Solicitation Categories	
Management and Business Professionals and Administrative Services (80000000)	
Education and Training Services (80000000)	

Award Details	
Awarded Vendors:	None
Responded Vendors:	None

Vendor Attachments	
Supplier	Attachments
Awsome Supplier	
Best Supplier	
Carroll Supplier	

Mandatory Documents	
Type	Document Name
	Solicitation 121920 - Training 1 Demo.pdf

Addendum Documents		
Type	Document Name	Date
	Supplier Response Template.pdf	December 18, 2020 at 3:44:08 PM GMT

Solicitation Addenda	
ReportChangeFormalReport_121920_v1_Dem_18_20.pdf	
VendorChangeDetailsReport_121920_v1_Dem_18_20.pdf	

Award Documents	
There are no award documents provided by the buyer.	



The summary of the information published will display. You may change the information if necessary. This is your opportunity to revise information before it is publicly displayed on the Bid Board. Click *Close* and *Close* again.

[DEMO]

Award

CT SOURCE

Print/Download solicitation summary | **View award report**

Solicitation # **121920** *

When reviewing bid summaries on this solicitation board : ✓Green Check Mark Means 'yes' ✗Red X Means 'no'

Training 1 Demo

Training 1 Demo for Bid/Solicitation Board in Stage

Start Date :	December 19, 2020 10:00:00 AM EST
End Date :	December 19, 2020 11:00:00 AM EST
Solicitation :	121920
Status :	Awarded / ADDENDUM
Delivery Terms :	Free On Board Destination
Payment Terms :	Vendor Specified
Who can respond to this bid ? :	All Vendors

Contact Information

Solicitation Number : 121920 from A CTsource Training Entity

Geri-Lynne Gagne
 450 Columbus Blvd Hartford CT, 06103 United States
 Tel: 860-713-6112
 Fax:
 geri-lynn.gagne@ct.gov

CTsource Training 2 Formal/Informal Manage Evaluate **Award** 102

Go to the Bid Board to see your published award. Note the status is flagged as awarded. You may view your published award information in the “*View award report*” in the top right corner. **[DEMO]**

The information displayed should mirror the report under “*Show me how it looks*”.



Questions & Answers



- Please use the Q&A function at the bottom of the screen to continue asking questions.
- We will answer as many questions as we can during the time we have left.
- All questions and answers will be posted on our website for future reference, so please be sure to go to <https://portal.ct.gov/DAS/CTSource/CTSource>



CTsource Training 2



This concludes Training 2. Training 3 will be **LIVE** (on-line) training events in **webinar** format with a **LIVE** Question & Answer segment at the end of the training.

Training 3: Contracts/Master Agreements is scheduled for *January 27, 2021*

Trainings 2 & 3 are recorded for those who cannot attend the training events to view at a later date. Questions and answers as well as links to the recordings will be posted @

<https://portal.ct.gov/DAS/CTSource/CTSource>

For any questions after the webinar or to request a username and password to the **Stage Environment** contact DAS Procurement Services by emailing: das.ctsource@ct.gov

Thank you!