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A.   OVERVIEW

A.1.   KEY BENEFITS

- One platform for the Central Purchasing Division (CP) and state agency (SA) solicitations increases visibility of state procurement needs among vendor community

- Solicitation listing allows a vendor search for business opportunity by keyword or specific item ID: number or name

- Statewide and state use contract listing allows CPO to search for contracts by keyword or specific item ID: number or name (no SW contract name or number is necessary to find the contract)

- Assures consistency of procurement processes throughout the State of Oklahoma

- Reflects the professionalism of the requesting agency

A.2.   TERMS OF USE

Agencies who wish to participate will need to:

- have an active CPO on staff

- current procedures updated to allow for the posting of solicitations in excess of $5,000

- use the solicitation packages created by DCS-CP for agencies
(see: http://www.ok.gov/DCS/Central_Purchasing/CP_Processes,_Rules_&_Statutes/index.html or DCS Library: https://www.ok.gov/dcs/searchdocs/app/index.php)

B.   USERS AND SYSTEM NAVIGATION

Application is managed by Active Users; published solicitations and contracts are viewed by the public. Each posting will carry agency buyer's name – Passive Users.

B.1.   PUBLIC VIEWERS

https://www.ok.gov/dcs/solicit/app/index.php

Public viewers have ability to search either for solicitations and view statewide and State Use contracts.

B.2. **ACTIVE USERS**

B.2.1. Active User Types

Content displayed for the public is managed b four types of active users:

- CP Administrator   System Administrator designated by the State Purchasing Director
- CP Data Entry   CP Contracting Officer or Administrative Technician/Assistant
- SA Administrator   Agency Primary CPO
- SA Data Entry   CPO or Administrative Technician/Assistant

B.2.2. Login View

Section C.1. explains how users are created but every active user accesses the account by providing login and password. Click "Agency Login" and login view appears under: https://www.ok.gov/dcs/solicit/app/admin/index.php.

B.3. **PASSIVE USERS**

Every solicitation posted has to list a responsible Buyer (CPO). Buyers may but do not have to be active users; for that reason Data Entry user can be a non-CPO.

C.   SYSTEM ADMINISTRATION (AGENCY)

C.1. **MANAGEMENT FEATURES**

- Manage User Accounts

    Adding, editing and removing Admin, Data Entry and Buyer users

    Note: State agency personnel can be granted to publish solicitations for its own agency and an agency that interagency agreement specifies. CP Admin assign the inter-agency rights to SA Admin. SA Admin can pass same rights on to SA Data Entry.

- Manage Solicitations

    Posting solicitations; solicitation released by CP are identified as released for a state agency, while solicitations issued by a state agency are identified as released by and for state agency

    Note: State agencies post regular acquisitions only while CP users have rights to publish statewide and state use contracts

- Manage Disclaimer

    Disclaimer is a default list of standard procedures and messages to a vendor that appears on the bottom of every solicitation listing; disclaimer established by CP is default for all state agenc.ies, but SA Admin can adjust it to meet its agency custom needs.

    Note: CP Admin can always over right agency disclaimer if CP Admin finds agency disclaimer unprofessional and/or in violation of state procurement laws and/or rules

- Manage Reports

    Ability to Admin to review number of solicitations by their status: Open, Pending Award, Awarded, and Canceled.

    Note: Agency Admin has access to view statistics only for its own agency and agencies assigned though interagency agreement

C.2.   ACTIVE USER RIGHTS

Access to modules is restricted to active users only.

Modules	CP Admin	CP D. Entry	SA Admin	SA D. Entry
Manage Solicitations	Yes	Yes	Yes	Yes
Manage User Accounts	Yes	No	Yes	No
Manage Disclaimer	Yes	No	Yes	No
Manage Reports	Yes	No	Yes	No

C.3.   MANAGING SOLICITATIONS

C.3.1. Agency Admin and Agency Data Entry have the ability to post solicitations for their own agency and agencies associated with the user based on an inter-agency agreement.

C.3.2. Agency Admin and Agency Data Entry can post only "regular acquisition" solicitations.

C.3.3. CP Admin and CP Data Entry have an additional ability to post State Use and State Wide Contracts.

C.3.4. Every solicitation posted requires entry or selection of:

- "Contract Type" (CP users only)

- "Agency" (SA users only) or "Solicitation Released For" (CP users only)

- "Solicitation Number" and "Solicitation Description"

- "Buyer"

    Note: At least one buyer has to be created by the Agency Admin prior posting a solicitation; buyer's name is associated with one agency only

    In case of intra-agency agreements if and a buyer is to post solicitations for more than one agency, then buyer's name has to be entered and associated with every agency

individually

- "Solicitation Status": Open, Closed, Pending Award, Canceled, and Awarded

    Note: *When the solicitation closing date is met, its status automatically changes from "Open" to "Pending Award".*

    All solicitations are automatically deleted after 180 days. A benchmark is the last date recorded: "Award Date" for awarded solicitations, or "Closing Date" for solicitations that have not been awarded

- "Closing Date" and "Date Status"

    Note: *When entering new solicitation for the first time, select "Original". When released Amendment changes due date, change "Closing Date" and change "Date Status" to "Changed".*

- "Pre-Bid Date"

    Note: *It is an non mandatory field; however, when selected, "Pre-Bid Mandatory?" and "Pre-Bid Details" have to be selected*

- "Attachment"

    Note: *Every file attached has to be categorized, i.e. agency view includes the following selection (take a note also to the available file formats, i.e. doc, pdf, etc):*

    Home / Manage Solicitations / Add Attachment (2 / 9)

    ## Add Solicitation (Step 2 of 9)

    * **Select Attachment Type:**

    - Please Select -

    | - Please Select - |
    | Amendment |
    | Contract |
    | Other |
    | Pre-Bid Conference |
    | Solicitation |

    ile: *(*.doc, *.docx, *.jpeg, *.jpg, *.pdf, *.ppt, *.pptx, *.xls, *.xlsx, *.zip)*

    Browse...

    Upload and publish accessible and professionally edited files.

    Maintain clean file names: no empty spaces, short, and consistent (i.e. dates)

- "Comments" (non mandatory field)

C.3.5. In order to have solicitation published, commodity must be selected:

- Click "Save and Continue" and select family, class and commodity

- Click "Save and Publish"

    Note: *"Save and Exit" will NOT publish the listing for the public viewer; use "Save and Exit" when for the purpose of editing an already published solicitation i.e. for the purpose of adding amendment or pre-bid attachments, etc.*

C.4. MANAGING USER ACCOUNTS

C.4.1. Agency Admin has the ability to add users. Agency Admin can add users only within own agency and agencies associated with the Agency Admin based on an inter-agency agreement.

C.4.2. There are three user types to choose from: Agency Administrator, Agency Data Entry, Buyer. Selection of any of the first two results in requirement to specify the primary agency and the intra-agency (if Agency Admin is associated with any), and assignment of a temporary password that the user will have to use at the time of an initial sign up (Agency Admin has to communicate this temporary password to the new user).

C.4.3. In order for a user to be able to set up an account and be able to log in, an account has to be activated.

Note: Users who do not work in the application, must be deactivated by the Agency Admin.

C.4.4. New user has to click "Agency Login", then "First Time User" and enter required information (see C.4.2.)

C.5. MANAGING DISCLAIMER

Every solicitation listing carries standard message to the vendor. The message should include registration instructions, accessibility guidance and other information that the Agency Primary CPO (Agency Admin) finds necessary.
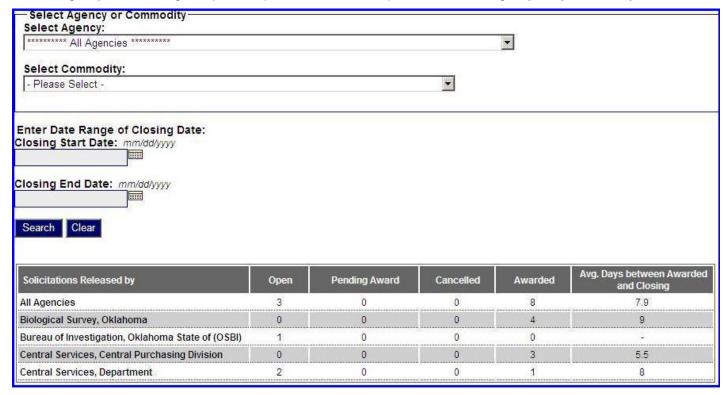
Note   *Disclaimer has to be created prior posting any solicitation.*

Agency Admin may view, copy and modify Central Purchasing's disclaimer – see DCS Procurement Office Example:

- Receive solicitation notifications automatically for all solicitations in this commodity! *- register your organization with the State of Oklahoma at* www.vendors.ok.gov.
*Note: beginning January 1st, 2011, DCS Procurement Division will require suppliers to register with Central Purchasing prior to completion of award (*read more*). Failure to do so will delay contract award.*
- Reminder: *It is the Bidder's responsibility to check the DCS website frequently for any possible amendments that may be issued. DCS Procurement Division is not responsible for a bidder's failure to download any amendment documents required to complete a solicitation.*
- *If documents listed on this page do not meet your accessibility requirements, please contact DCS at (405) 522-0955 and appropriate accommodations will be made.*
We recommend you use the latest version of Adobe Reader. If you need to download Adobe Reader, here is a link to the Adobe WebSite.

C.6. MANAGING REPORTS

Agency Admin can get a quick snapshot of solicitations posted under the agency or by commodity.

Select Agency or Commodity

Select Agency:
********** All Agencies **********

Select Commodity:
- Please Select -

Enter Date Range of Closing Date:

Closing Start Date: *mm/dd/yyyy*

Closing End Date: *mm/dd/yyyy*

[Search] [Clear]

Solicitations Released by	Open	Pending Award	Cancelled	Awarded	Avg. Days between Awarded and Closing
All Agencies	3	0	0	8	7.9
Biological Survey, Oklahoma	0	0	0	4	9
Bureau of Investigation, Oklahoma State of (OSBI)	1	0	0	0	-
Central Services, Central Purchasing Division	0	0	0	3	5.5
Central Services, Department	2	0	0	1	8

D. OTHER ISSUES

For other issues, contact CP Administrator at: cp_fedback@.dcs.state.ok.us.