



**State of Oklahoma
Department of Central Services
Central Purchasing**

**Solicitation Package
Instructions for MS Word 2007**

TABLE OF CONTENTS

A. OBJECTIVE	2
B. SOLICITATION PACKAGES DESIGNATION	2
B.1. Templates Available	2
B.2. Template Type	2
B.3. Template Version	2
C. TECHNICAL REQUIREMENTS	3
C.1. SHORT Version	3
C.1.1. Required Software	3
C.1.2. Required Skills to Use Short Version	3
C.2. FULL Version	3
C.2.1. Required Software	3
C.2.2. Required Skills to Use Full Version	3
D. USING SHORT	4
E. USING FULL PACKAGE	4
E.1. Components	4
E.2. Preparing a Solicitation	5
E.3. Merging Documents	5
E.4. Editing File 3 in MS Word	5
E.4.1. Data Entry, Copying and Pasting	5
E.4.2. Using Tables	6
E.4.3. Images	7
E.4.4. Links	7
E.4.5. Ink Signatures	8
E.4.6. Tracking Changes	8
E.4.7. Table of Contents	8
E.5. Creating PDFs	9
E.5.1. Conversion Settings	9
E.5.2. Converting MS Word document (DOC) into Adobe (PDF)	10
E.5.3. Improving Scanned Documents	10
E.5.4. Adding Pages and Combining Files into a Final PDF	11
E.5.5. Page Order	13
E.5.6. Bookmarks	14
E.5.7. Language	14
E.5.8. Reading Order	15
E.5.9. Accessibility Check	16
E.5.10. Protecting PDF	18
E.6. Document Storage	19
E.7. Other Issues	19

A. OBJECTIVE

Solicitation packages have been developed to accomplish the following:

- Meet statutory purchasing requirements
- Assure consistency of procurement processes throughout the State of Oklahoma
- Reflect the professionalism of the requesting agency
- Provide customer friendly documents
- Publish the most accessible documents possible

B. SOLICITATION PACKAGES DESIGNATION

B.1. TEMPLATES AVAILABLE

There are four solicitation templates available for two types of users, two versions each.

Table 1 - Files Titles

Version	Type: CP (Central Purchasing)	Type: SA (state agency)
FULL	DCS-CP-SOLICITATION-FULL	DCS-SA-SOLICITATION-FULL
SHORT	DCS-CP-SOLICITATION-SHORT	DCS-SA-SOLICITATION-SHORT

B.2. TEMPLATE TYPE

There are two types of solicitation packages to use:

- **CP** - for solicitations to be processed for state agencies through DCS, Central Purchasing Division (CP). The Central Purchasing Division **requires** using the CP solicitation packages for solicitations processed through Central Purchasing.
- **SA** - for solicitations conducted independently by state agencies (SA). DCS **recommends** using the SA solicitation packages for solicitations processed internally by an agency but **requires** for all solicitations exceeding \$50,000.00. Chose the appropriate version based on the complexity of an acquisition.

B.3. TEMPLATE VERSION

Table 2 - Templates Design

Package Content:	Package Version: SHORT	Package Version: FULL
DCS-Form-CP- 070, Solicitation	Yes	Yes
DCS-Form-CP- 076, Responding Bidder Information	Yes	Yes
DCS-Form-CP- 004, Certification for Competitive Bid and/or Contract	Yes	Yes
Table of Contents	No	Yes
General Provisions ¹	Yes	Yes (Section A)
Special Provisions ²	No	Yes (Section B)
Solicitation Specifications	No ³	Yes (Section C)
Evaluation	No ³	Yes (Section D)
Instructions to Supplier	No ³	Yes (Section E)
Checklist	No	Yes (Section F)
Other	No	Yes (Section G)
Price And Cost	No	Yes (Section H)

¹ General Provisions are not subject to any changes

² Special Provisions must **not** duplicate General Provisions included in the package

Special Provisions must be carefully considered and written to minimize the risk of protest or litigation

³ To be included in a PeopleSoft generated Requisition

There are two versions to choose from within each type:

- **FULL** - for solicitations requiring specifications, special provisions, etc
- **SHORT** - for simple solicitations

All packages share the same layout: Forms 070, 076 and 004 are followed by General Provisions. Additionally, the FULL version contains table of contents and editable sections (from B through H) that are not included in the SHORT version.

C. TECHNICAL REQUIREMENTS

C.1. SHORT VERSION

C.1.1. Required Software

- MS Word (2003, preferably 2007)
- Adobe Reader 8.0 or Adobe Acrobat 8.0 (Standard or Professional)

Note: Adobe Reader does not allow converting and editing documents.

C.1.2. Required Skills to Use Short Version

- MS Word & Adobe: Data entry skills.

Note: Although MS Word (DOC) version is published along with Portable Document Format (PDF), CP recommends using PDF file of the SHORT package because Adobe Reader is a popular freeware and easily available for download for bidders. Additionally, PDF template is more accessible than a PDF created from DOC version (providing that an agency publishes solicitations in PDF).

- Adobe Acrobat: "Insert Pages" – merging several documents to create one file; if PeopleSoft generated requisition is to be merged with a solicitation file, Adobe Acrobat is required (Adobe Acrobat is commonly called PDF Writer).

Note: 1: It is not possible to merge DOC version of the SHORT package with a PeopleSoft generated requisition, which is in PDF. Use PDF file of the SHORT package instead.

2: If a user (CPO) does not have Adobe Acrobat available, solicitation document (either as PDF or DOC) and state agency's Requisition or Purchase Order (in PDF) can be published as two separate documents.

- Adobe Acrobat: "Secure" (optional) – securing parts or the whole document to prevent changes

C.2. FULL VERSION

C.2.1. Required Software

- MS Word (2003, preferably 2007)
- Adobe Acrobat 8.0 (Standard or Professional)

Note: Adobe Reader does not allow converting and editing documents that FULL package requires.

C.2.2. Required Skills to Use Full Version

- MS Word: "Styles" – editing format with predesigned styles
- MS Word: "References" – managing document's table of contents
- Adobe Acrobat: "Convert to Adobe PDF" - printing from DOC to PDF
- Adobe Acrobat: "Insert Pages" – merging several documents to create one file
- Adobe Acrobat: "Accessibility" – verifying accessibility of the document
- Adobe Acrobat: "Secure" (optional) – securing parts or the whole document to prevent changes

D. USING SHORT

Download the latest version of the form from the DCS website (www.dcs.ok.gov); type desired content in the form fields; save it and publish.

E. USING FULL PACKAGE

E.1. COMPONENTS

The objective is to post solicitation as an accessible PDF file. In order to accomplish that requirement and deliver professional procurement document, three documents have to be merged. First two are accessible Adobe (PDF) files, while the third one is an unprotected MS Word (DOC) file with predefined accessibility features.

Figure 1 – Integration of Components of the Full Package

Initial Documents		End Result	
File 1: PDF	DCS-Form-CP- 070	PDF	DCS-Form-CP- 070
	DCS-Form-CP- 076		DCS-Form-CP- 076
	DCS-Form-CP- 004		DCS-Form-CP- 004
File 2: PDF	Section A (General Provisions)		Table of Contents
			Section A (General Provisions)
File 3: DOC	Table of Contents		Section B (Special Provisions)
	Section B (Special Provisions)		Section C (Solicitation Specifications)
	Section C (Solicitation Specifications)		Section D (Evaluation)
	Section D (Evaluation)		Section E (Instructions to Supplier)
	Section E (Instructions to Supplier)		Section F (Checklist)
	Section F (Checklist)		Section G (Other)
	Section G (Other)		Section H (Price And Cost)
	Section H (Price And Cost)		

- File 1: DCS-CP-SOLICITATION-FORMS.pdf (state agency: DCS-SA-SOLICITATION-FORMS.pdf): consists of three forms (see: B.3.).
- File 2: DCS-CP-SOLICITATION-GPs.pdf (state agency: DCS-SA-SOLICITATION-GPs.pdf): carries the General Provisions: CP is a fixed listing while SA has form fields in Section A.6., Bid Opening, to be filled out by an agency.
- File 3: DCS-CP-SOLICITATION-SECTIONS.doc (state agency: DCS-SA-SOLICITATION-SECTIONS.doc): allows entering content in predesigned sections (B through H) and updating table of contents.

SUGGESTION: Delete unutilized sections.

Note: Although these instructions are written for users with MS Word 2007, File 3 is saved in DOC instead of DOCX format. This allows users who are still using MS Word 2003 to open and work on File 3.

E.2. PREPARING A SOLICITATION

- 1 File 1: Agency fills in form fields on the first page (DCS-FORM-CP-070, Solicitation) of File 1. Click “Save”.

Note: Vendor will complete the following two pages (DCS-FORM-CP-076, Responding Bidder information, and DCS-FORM-CP-004, Certification for Competitive Bid and/or Contract).

- 2 File 2: If SA solicitation, fill out form fields in File 2 in Section A.6., Bid Opening. Click “Save”.
- 3 File 3: Enter content in predesigned sections (B through H) and update table of contents of File 3 (see E.4.). Click “Save”. Convert to PDF (see E.5.2).

Note: Unlike SA, CP package is to be converted to PDF and merged into a final file by CP staff; DO NOT convert DCS-CP-SOLICITATION-SECTIONS.doc file to PDF - upon completion of entry, email edited file in MS Word format to the CP Buyer.

E.3. MERGING DOCUMENTS

- 1 File 1: Click “Save As” to create a final document. Name final file with the solicitation number, i.e. Solicitation-5800000001.pdf.
- 2 File 2: Insert File 2 to the final file (see E.5.4.); be sure to select insert as last pages.
- 3 File 3: Insert pages of File 3 into final file; be sure to select insert as last pages.
- 4 Final file: Move page #8 (table of contents) to be #4. (see E.5.5.)
- 5 Final: Carry out final accessibility adjustments (E.5.7. and E.5.8.)

E.4. EDITING FILE 3 IN MS WORD

File 3 (DCS-CP-SOLICITATION-FULL-file3.doc) requires application of following functions of MS Word prior to conversion to PDF and integration into a final document.

E.4.1. Data Entry, Copying and Pasting

Sections from B forward are enabling data entry and copying / pasting content from different sources. Use predesigned styles under tab: Home > Styles (Figure 2) in order to assure consistent formatting throughout the document. Predesigned styles address: numbering (outlining / bulleting), regular text format and footnotes. For example, Figure 2 indicates that word “Evaluation Team” is specified as “Heading 2”.

Content formatted with HEADING 1 is linked to a document’s table of contents. Therefore, it is recommended to only use it to format main sections’ titles, i.e. “Evaluation”.

Note: 1: Because Section A, General Provisions, is included in File 2, which is not functionally related to File 3, the table of contents in File 3 does not provide hyperlink to this section.

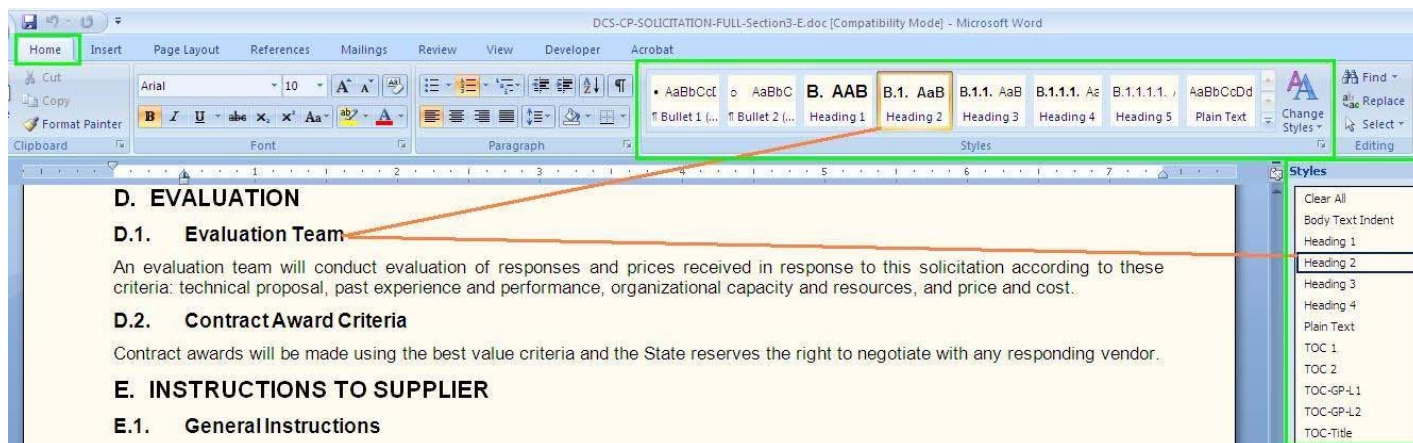
2: Because File 3 is fully open for editing, heading structure unpredictable (document can be short or very complex). Since the number and depth of headings is not fixed, the table of contents lists only first level of headings to make sure that references fit one page only. This allows for the final document to maintain a consistent page numbering.

SUGGESTION #1: *If the content for sections B and forward is not written in File 3, you will have to convert every element of this content to the corresponding style available. Additionally; if the external file carried content in headers and footers, using command: Home > Paste > Paste Special > Unformatted Text will assure that File 3 will maintain consistent pagination. Clearing formatting of a copied content might be helpful too - command: Home > Font > Clear Formatting.*

SUGGESTION #2: *Besides providing a professional and clear view of the document, using pre-designated style every content type assures that: 1) consistently formatted and titled text is recognized by assistive technology (software for visually impaired readers); 2) the table of contents can be updated.*

SUGGESTION #3: *Avoid using “Enter” key to create space between paragraphs. If necessary, create space through tab: Page Layout > Paragraph > Spacing> Before (or After).*

Figure 2 – Editing Format Using Styles



E.4.2. Using Tables

In order to insert a table click on tab “Insert > Tables” (do not use “Tab” key and “Space” bar to create tables).

SUGGESTION #1: Avoid letting table rows break across a page.

SUGGESTION #2: Make sure that the table headings are established as a row not as a column.

SUGGESTION #3: To allow assistive technology to recognize the header of the table, be sure to highlight the **first** row and either right mouse click that row and check “Repeat as header row at the top of each page” in the table properties (Figure 3,) or follow command: Layout > Repeat Header Rows (Figure 4).

SUGGESTION #4: Check “Allow row to break across pages”, for tables that are longer than one page. If a table can fit one page but breaks across two pages, be sure to use a page break (command: Insert > Page Break).

Figure 3 – Accessible Table (Option 1)

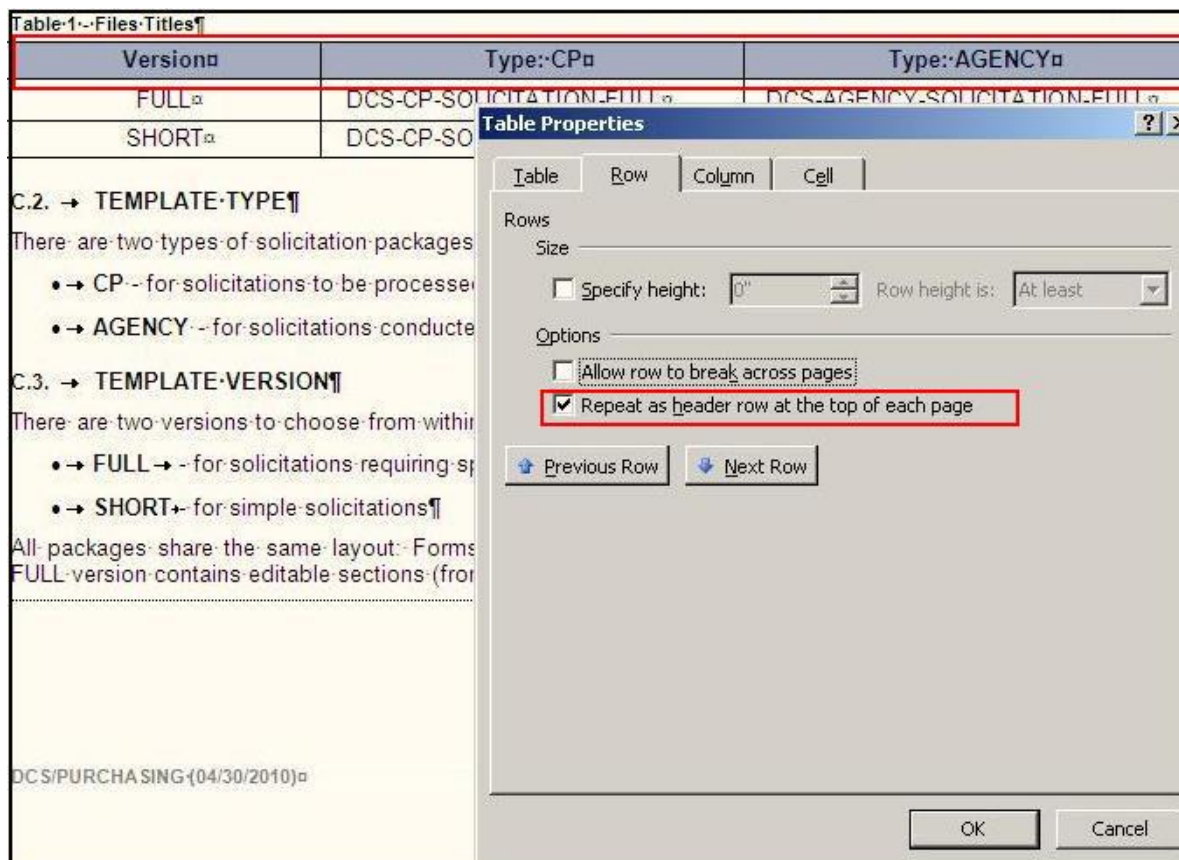
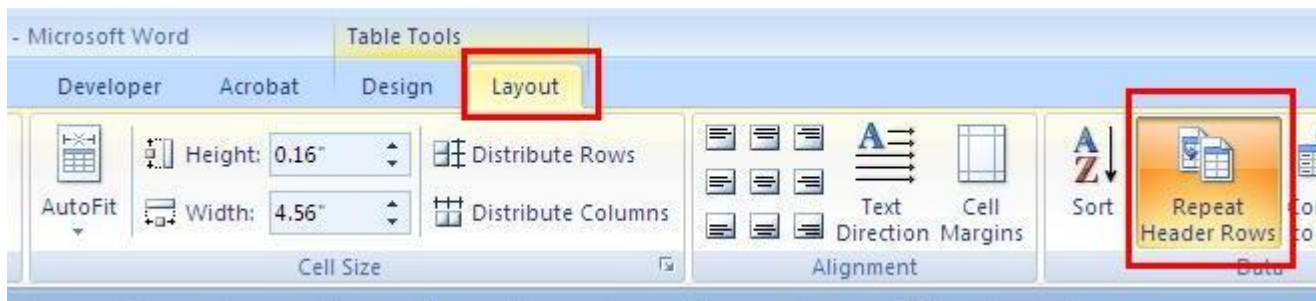


Figure 4 – Accessible Table (Option 2)



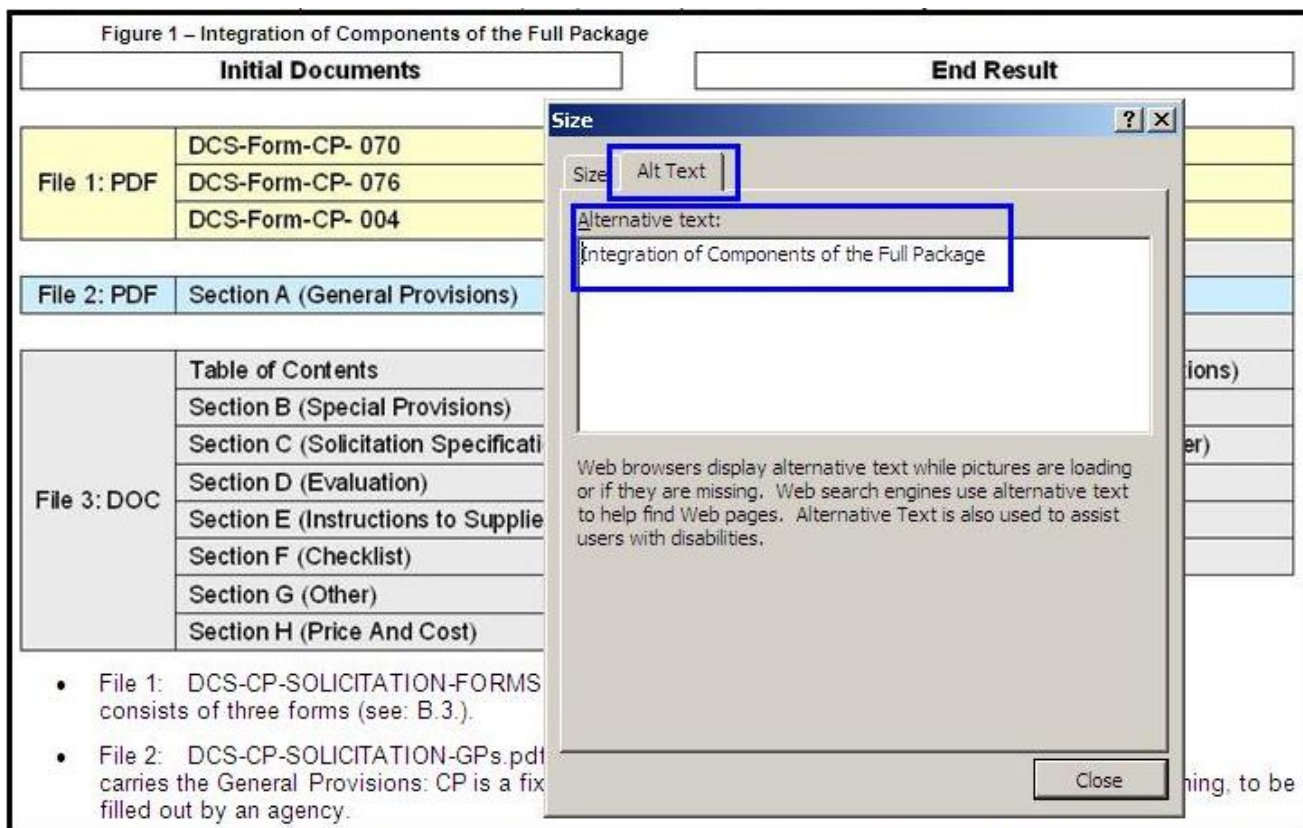
E.4.3. Images

If an image is part of a solicitation, insert pictures through tab: Insert > Picture and, for the accessibility purposes, provide an alternate text to an image by: right-mouse-clicking on the image > Format Picture > Size (Figure 5).

Note: When File 3 is saved as DOC, "Alt Text" is under "Format Picture" instead of "Size"

SUGGESTION As long as preceding content is descriptive enough, alternative text should be brief.

Figure 5 – Providing Alternate Text for Images



E.4.4. Links

Describe and provide a full web address for a link, i.e. "...solicitations can be found on the DCS' website (www.dcs.ok.gov)". Introducing a link provides a description and explains the link for the vision impaired viewer, who uses assistive technology to read the content, while listing an actual url address helps redirect paper copy readers to the website.

E.4.5. Ink Signatures

If an ink signed document is to be scanned and posted on a website, consider placing the following statement: “[originally signed document on file]” in lieu of signature in DOC. The Statement must be inserted prior to creating PDF to increase document’s accessibility (Figure 6).

Figure 6 – Posting Accessible Documents without Ink Signatures



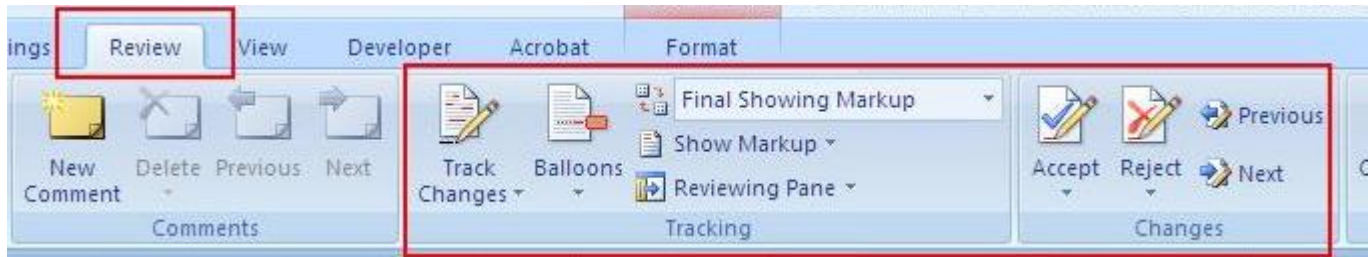
SUGGESTION: For PeopleSoft generated PDFs, use feature called typewriter, Acrobat command: Tools > Typewriter.

E.4.6. Tracking Changes

Users may find it helpful to engage changes review; tab: “Review” > “Track Changes” (Figure 7).

SUGGESTION: When using tracking, be sure to decide on changes made (accept and/or reject them) and turn the tracking feature off before the content is pasted from working document to the final package.

Figure 7 – Tracking Changes



E.4.7. Table of Contents

The table of contents enhances document’s navigation. It is electronically generated by the first outline level available in Styles: Heading 1. When a document’s content and its Styles adjustment is completed, update the table of contents: right mouse click on the table of contents > select “Update Field” > select “Update entire table” (Figure 8)

Figure 8 – Updating Table of Contents



E.5. CREATING PDFS

Note 1: Unlike SA, CP package is to be converted to PDF and merged into a final file by CP staff; DO NOT convert DCS-CP-SOLICITATION-SECTIONS.doc file to PDF - upon completion of entry, email edited file in MS Word format to the CP Buyer.

2: All sections below are presented in order that user must follow.

E.5.1. Conversion Settings

Make sure that MS Word conversion settings enable producing accessible PDFs; click tab: Acrobat > Preferences > Settings (Figure 9). Be sure that bookmarks Heading 1 and Heading 2 are checked (Figure 10).

Figure 9 – Conversion Settings – Settings

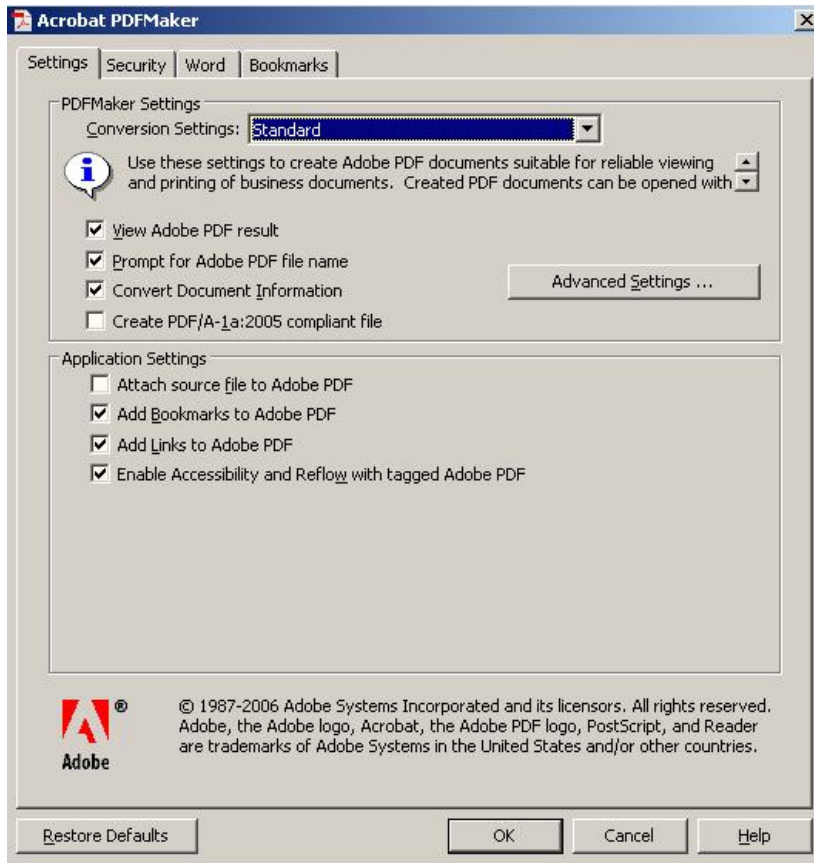
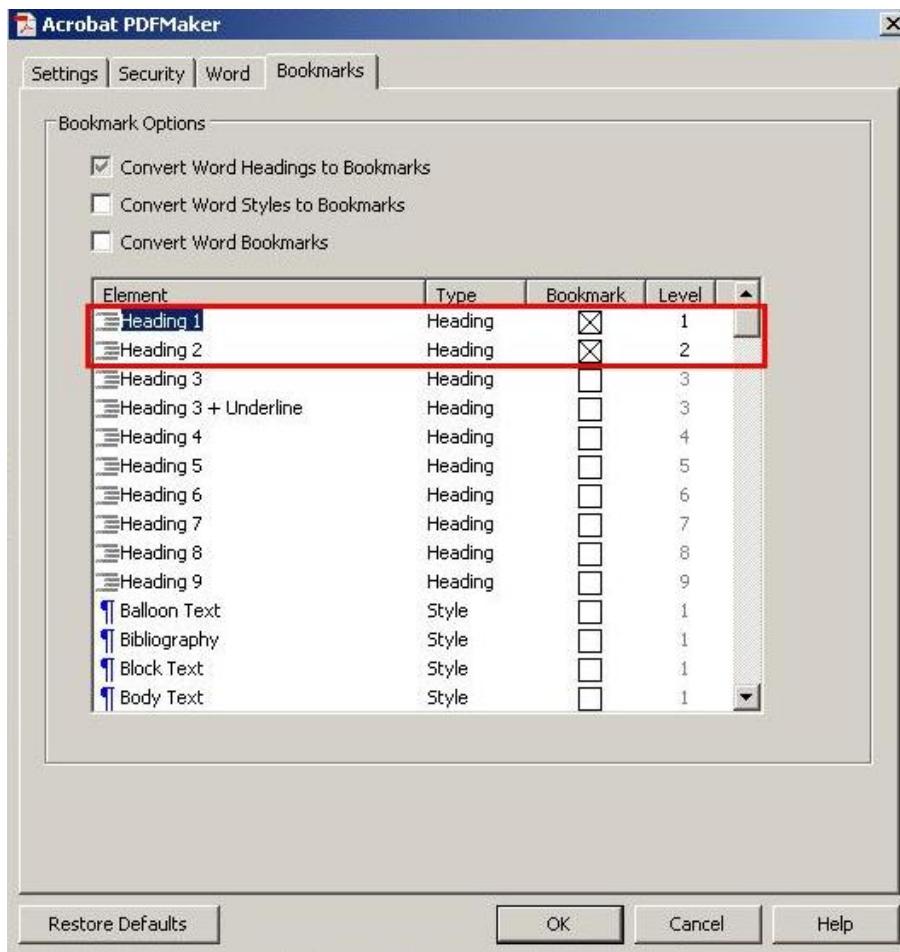


Figure 10 – Conversion Settings – Bookmarks

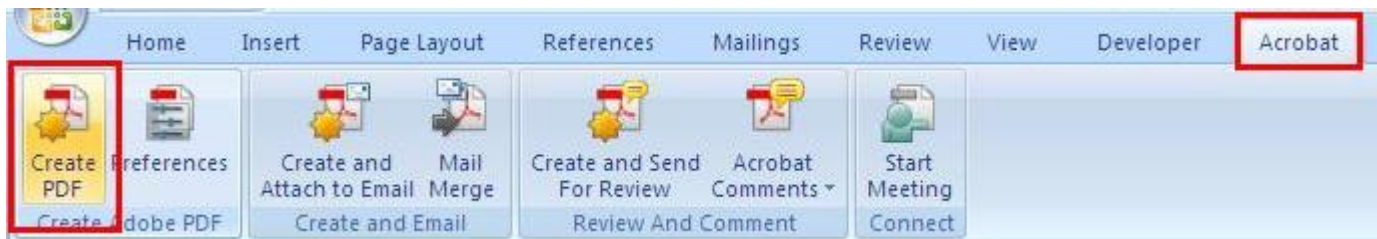


E.5.2. Converting MS Word document (DOC) into Adobe (PDF)

Click on Tab: Adobe > Create PDF (Figure 11).

SUGGESTION: Do not use command: File > Print > Adobe PDF because this method of conversion reduces PDF's accessibility.

Figure 11 – Converting DOC to PDF



E.5.3. Improving Scanned Documents

Scanned documents are hardly ever accessible and often not easy to read because content is blurry and pages skewed. Document can be made accessible but it is a tedious process. Therefore, require specifications (and other sections) to be delivered in an accessible and editable electronic format to ensure final PDFs readability and accessibility.

Ensure scanned pages readability, **prior to** combining the final solicitation package by following these steps in Adobe Acrobat: Document > OCR Text Recognition > Recognize Text Using OCR > Primary OCR Language: English (US) commands (Figure 12 & 13).

Note If scanned document is longer than one page, select "All pages".

Figure 12 – Recognizing Text of Scanned Files (step 1)

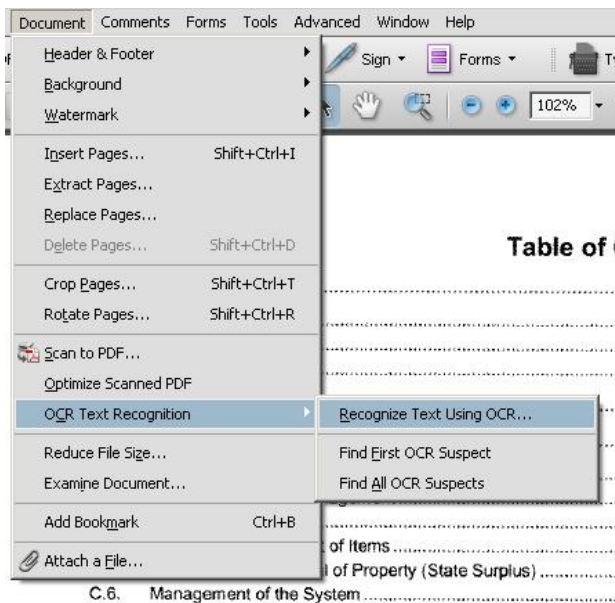
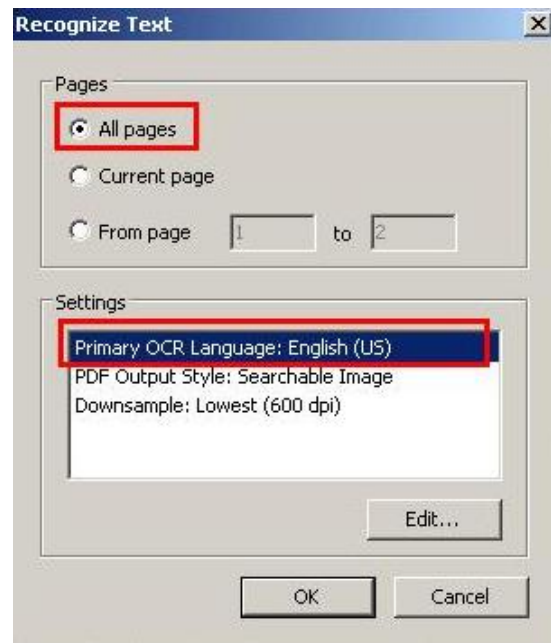


Figure 13 – Recognizing Text of Scanned Files (step 2)



SUGGESTION: Attach a scanned document, even after OCR procedure, instead of combining it with the merged file. Otherwise, all images in the document will lose image accessibility features specified in E.4.5.

E.5.4. Adding Pages and Combining Files into a Final PDF

As noted in section E.3. creation of one solicitation file requires integration of three documents. Command: Combined Files > Merge Files into Single PDF (Figure 14 & 15).

Note: Adding pages is possible as long as the main PDF (the file where pages are added to) is not protected.

Figure 14 – Combining several files into one PDF file (step 1)

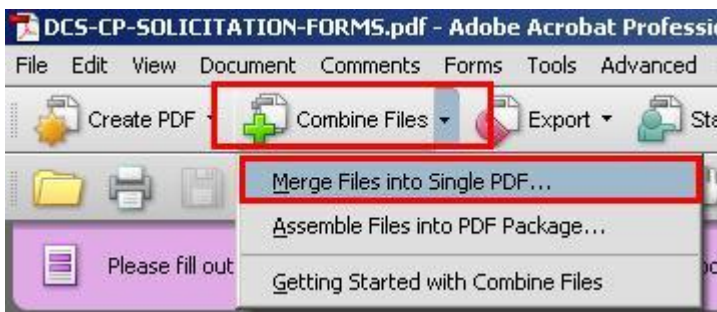
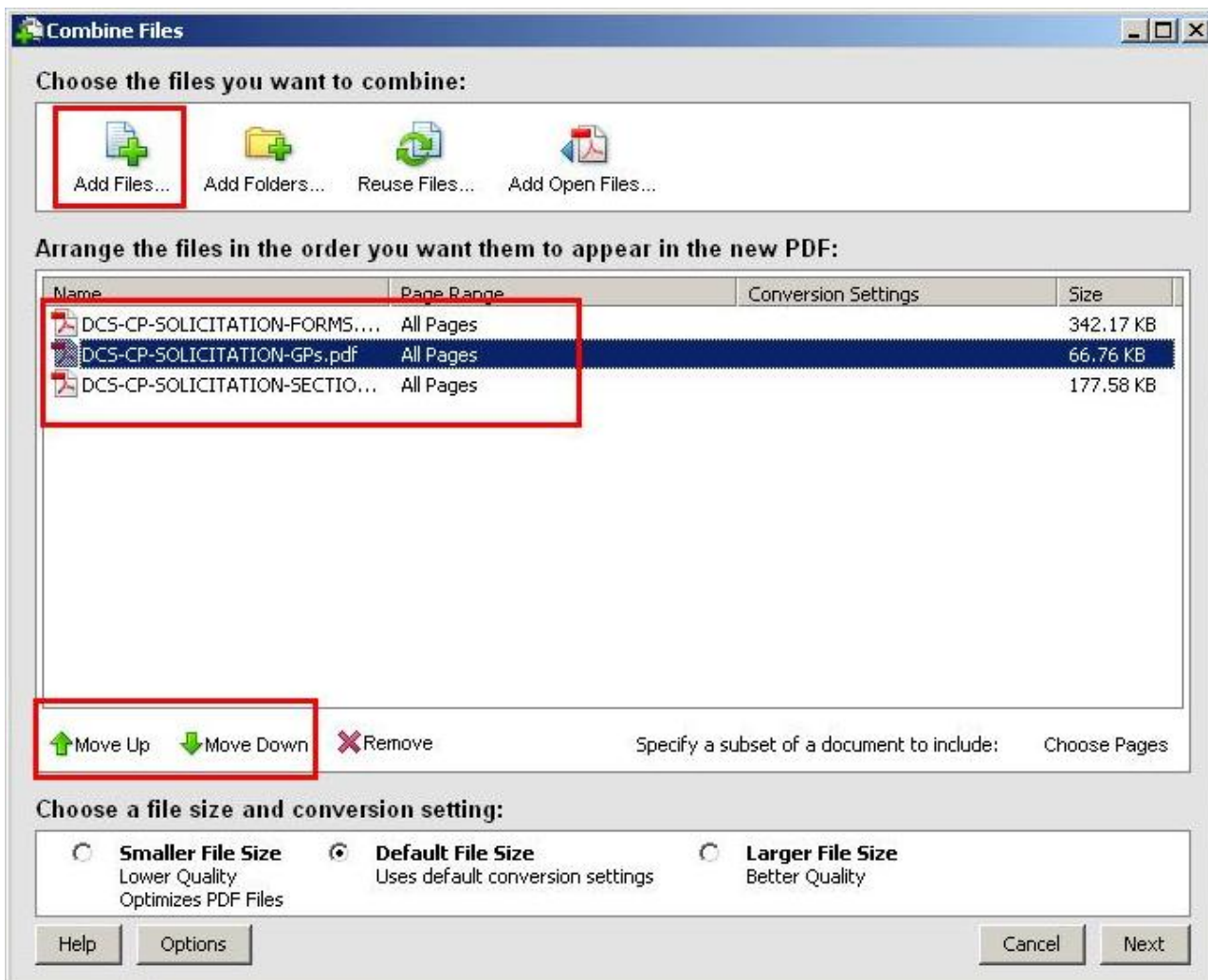


Figure 15 – Combining several files into one PDF file (step 2)



Note: 1: Since there is an established order of files to be combined (Forms > GPs > SECTIONS > ...), be sure to adjust file listing with "Move Up or Down" buttons, if necessary.

If a scanned document is to be a part of the solicitation, be sure to attach it, instead of combining it into the final file (Figure 16).

Figure 16 – Attaching Scanned Files

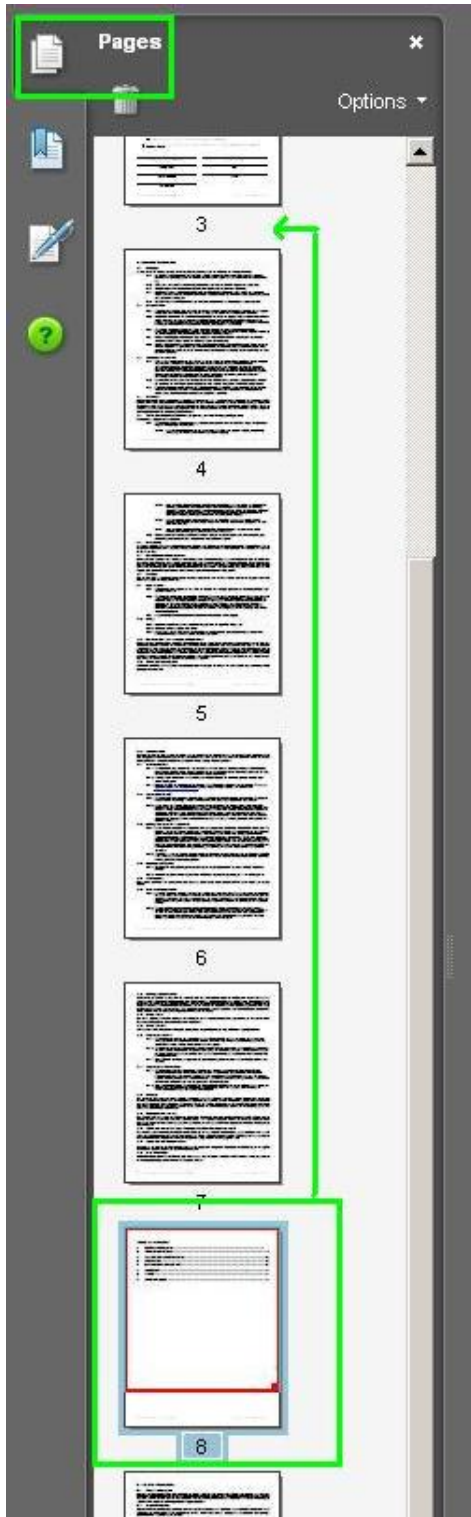


E.5.5. Page Order

As described in E.3. #4 Final file requires page order adjustment (Figure 17):

- 1 Click on "Pages" of the left panel
- 2 Click on page #8
- 3 Holding page #8, move (drag) it to follow page #3

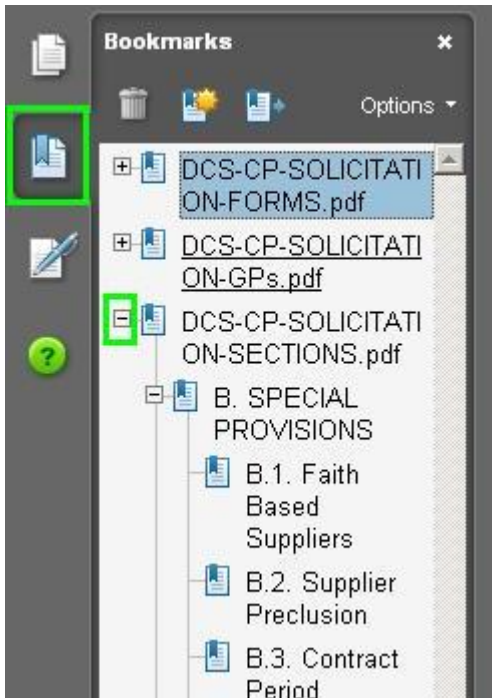
Figure 17 – Adjusting Page Order



E.5.6. Bookmarks

Proper document merging allows for easy navigation through bookmarks. Bookmarks order should reflect solicitation package flow. Bookmarks provide easy navigation to any section of a document regardless of the present view (Figure 18).

Figure 18 – Navigating with Bookmarks



Note: Be sure to maintain consistent and clear file naming of the three files and attachments because file names become the first level in bookmarks when files are combined together.

E.5.7. Language

Specify language of a created PDF to allow assistive technology to recognize the text in the document; command: File > Properties > Advanced > Language > English US (Figure 19 & 20)

Figure 19 – Specifying Language (step 1)

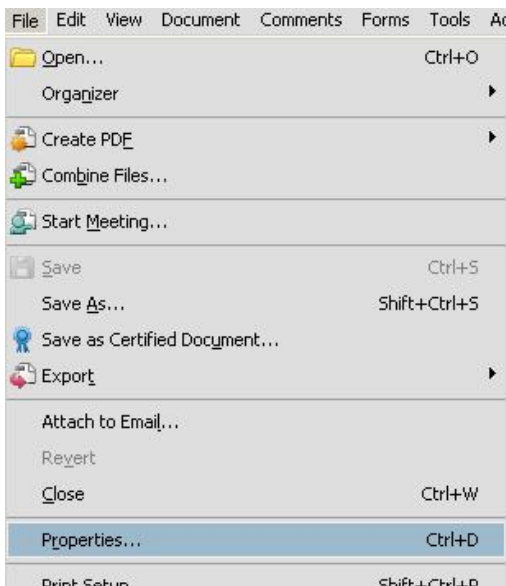
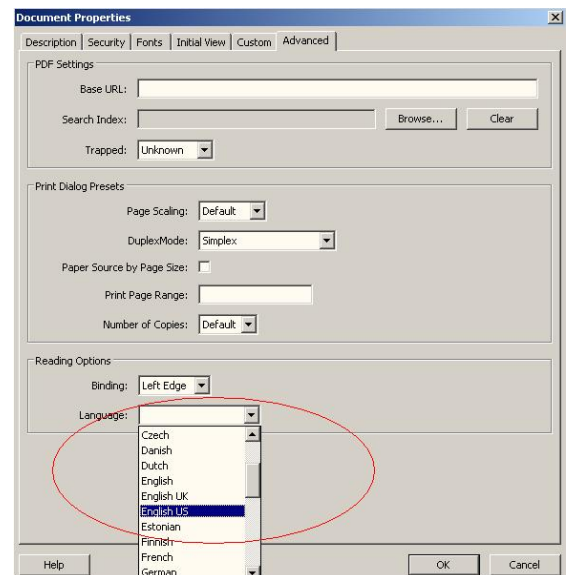


Figure 20 – Specifying Language (step 2)



Note: Language is set in individual files. However, when content is copied and pasted from a different source to File 3, language parameters may change and when all three files are combined, the final file may need to have language specified.

E.5.8. Reading Order

Specify reading order of a created PDF to allow assistive technology to read the content in a logical order; command (Figure 21):

- 1 Click “Pages” on the left panel
- 2 Highlight desired pages (“Ctrl+A” highlights all)
- 3 Check “Options”
- 4 Page Properties
- 5 Tab Order > check: “Use Row Order”(Figure 22)

Figure 21 – Specifying Order (step 1)

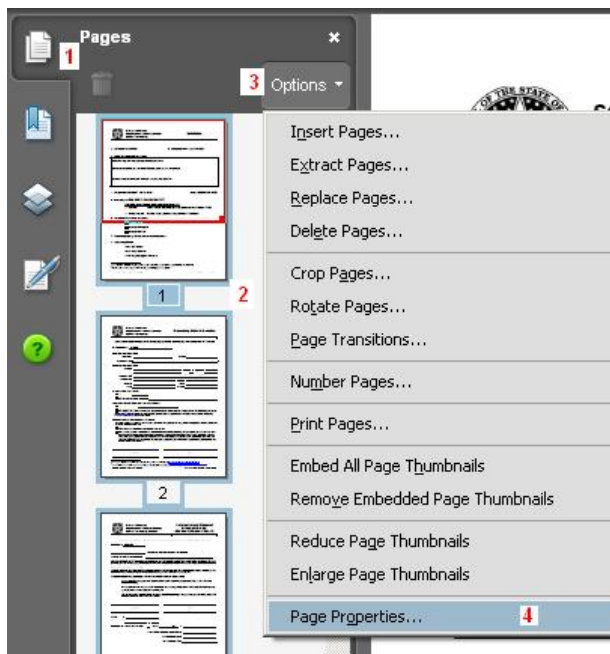
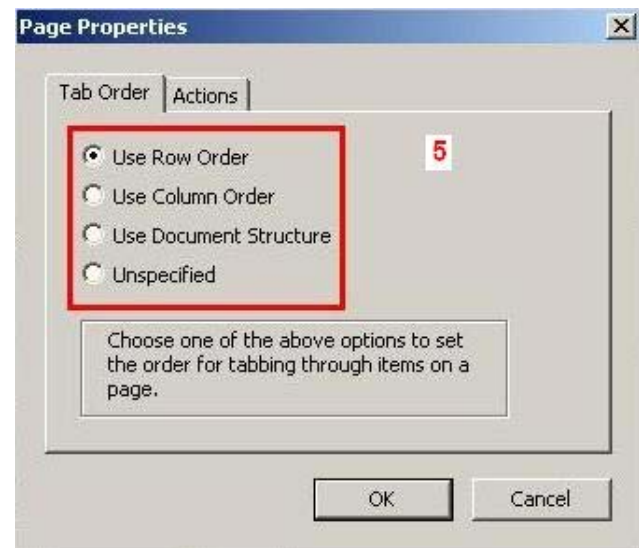


Figure 22 – Specifying Order (step 2)



E.5.9. Accessibility Check

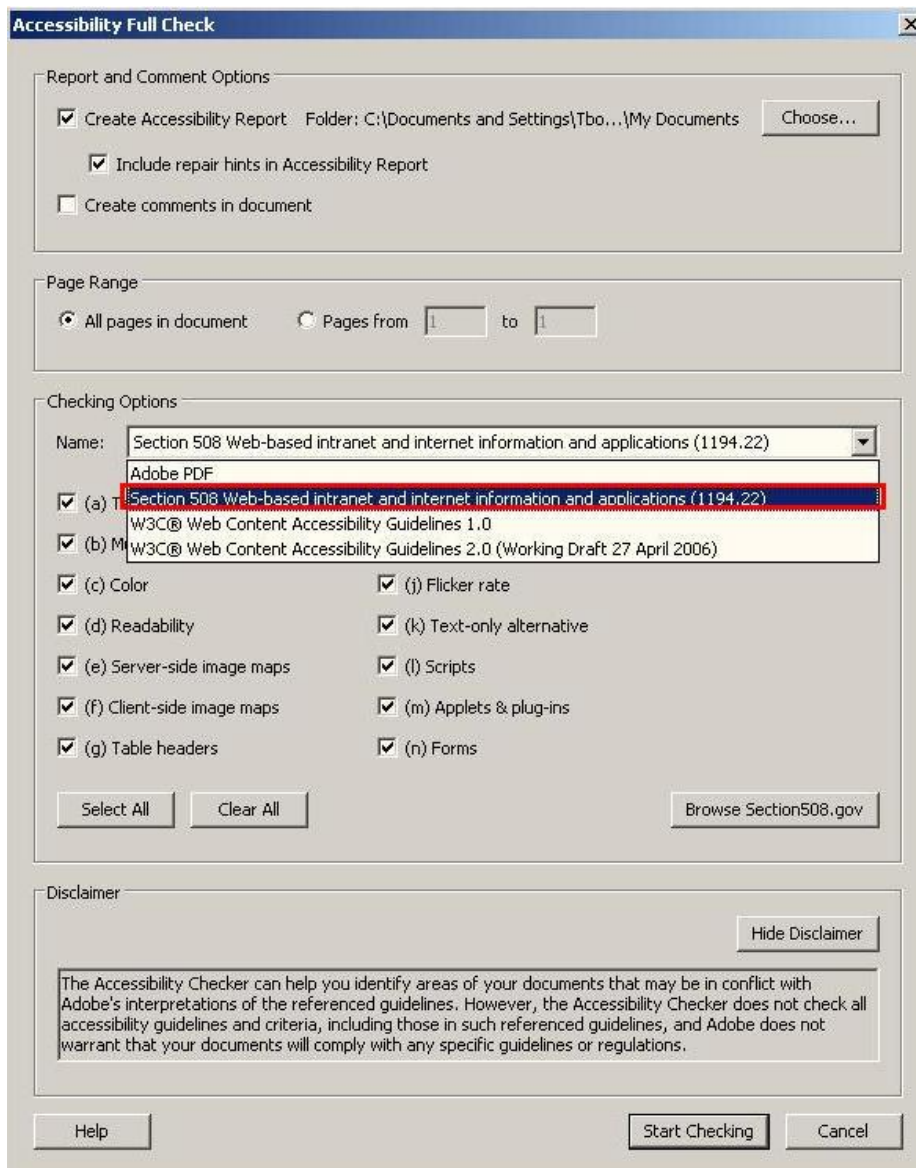
In order to carry out the accessibility check carry out the following:

- Under Adobe Professional command: Advanced > Accessibility > Full Check > Checking Options > Adobe PDF or Section 508 (Figure 23)

Note: “Adobe PDF” may reveal different alerts than “Section 508”, i.e.: Adobe PDF check of a rough scan alerts lack of: image description (alt text), text recognition and tagging, while Section 508 check reveals only lack of alt text. Run both checks to make sure that there are no significant issues with the document.

- Under Adobe Standard command: Advanced > Accessibility > Quick Check.

Figure 23 – Accessibility Check according to Section 508 in Adobe Professional



Test results under Adobe Standard and Professional may not only differ but be misleading. Figures below clearly point out that those differences (Figure 24, 25, 26).

Adobe Standard check states that document is accessible, while test conducted of the same document in Adobe Professional revealed many issues. That is why it is **imperative** to follow all steps in the preceding sections in order to assure document's accessibility.

Figure 24 – Accessibility Check Results in Adobe Standard

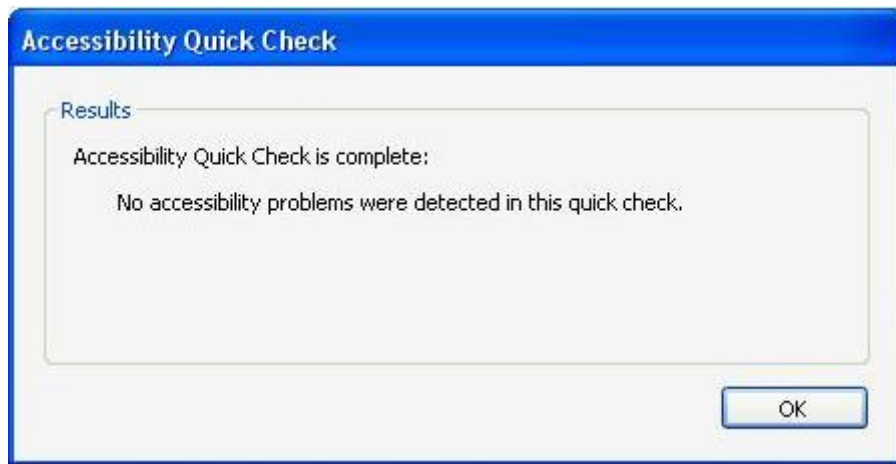


Figure 25 – Accessibility Check Result in Adobe Professional according to Section 508

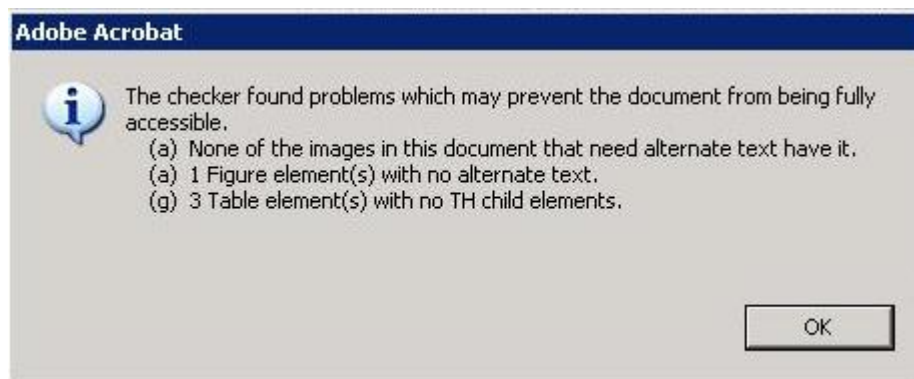
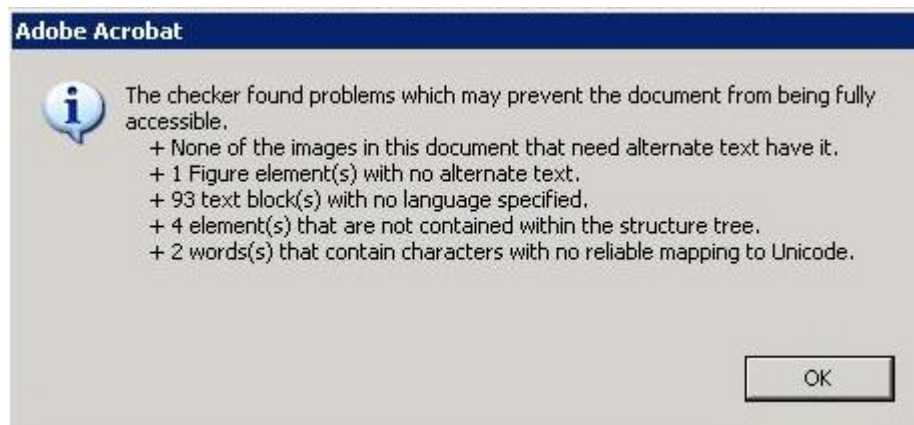


Figure 26 – Accessibility Check Result in Adobe Professional according to Adobe



E.5.10. Protecting PDF

Protection of PDF provides additional assurance that the solicitation will not be altered by a user with Acrobat Adobe Professional. Since the CPO holds the original file, protection is not a necessary step. If applied, be sure to select appropriate protection parameters (see below) because the solicitation package carries form fields that have to be filled out by a bidder (page 2 and 3 of the solicitation package). Command:

- Click on: Advanced > Security > Password Encrypt
- “Restrict editing and printing...” (Figure 27)
- “High Resolution” printing
- “Filling in forms...” for allowed changes
- “Enable text access for screen readers...”

Figure 27 – Protection Parameters

Password Security - Settings

Compatibility: Acrobat 5.0 and later

Encryption Level: 128-bit RC4

Select Document Components to Encrypt

- ☒ Encrypt all document contents
- ☐ Encrypt all document contents except metadata (Acrobat 6 and later compatible)
- ☐ Encrypt only file attachments (Acrobat 7 and later compatible)

All contents of the document will be encrypted and search engines will not be able to access the document's metadata.

☐ Require a password to open the document

Document Open Password:

No password will be required to open this document.

Permissions

- ☒ Restrict editing and printing of the document. A password will be required in order to change these permission settings.

Change Permissions Password: *****

Printing Allowed: High Resolution

Changes Allowed: Filling in form fields and signing existing signature fields

☐ Enable copying of text, images, and other content

- ☒ Enable text access for screen reader devices for the visually impaired

Help OK Cancel

SUGGESTION:

Be sure that someone else from an agency staff has password to the published file and/or save the unprotected copy of the file in the secure location to allow other agency personnel to address any issues with the document in case the author of the document is not available.

E.6. DOCUMENT STORAGE

It is advisable to have all documents saved in editable format in a safe location to be able to conduct additional accessibility adjustments as needed.

E.7. OTHER ISSUES

For other issues, utilize function Help or press key F1 both in MS Word and Adobe.