

BCBid

Invitation to Quote (ITQ) Guide
for Ministry Buyers
with the Read-only Role

Introduction

BC Bid is an online marketplace where public sector organizations (including municipalities, school districts, health authorities, Crown corporations and the B.C. government) advertise opportunities for a wide range of goods and services contracts.

The BC Bid application is a key tool, supporting B.C.'s Procurement Strategy transformation goals. This application provides a modern platform for government sourcing projects, increases transparency, and makes it easier for businesses of all sizes to do business with the public sector entities.

The application is easy to navigate and allows users to complete many tasks online:

- Buyers can set up opportunities, communicate with team members and suppliers, and post and award contracts.
- Suppliers can subscribe to or renew e-Bidding accounts and opportunity subscriptions, view and respond to opportunities (some via e-Bids) and manage a dashboard of their opportunities and communicate with buyers.

Throughout this and other BC Bid User Guides, short video clips are available to demonstrate key functions.

This guide provides instructions on the Invitation to Quote template for Read-only users.

How to Use this Guide

Hyperlinks throughout this guide take you to the appropriate sections and accompanying videos.

Opening the Navigation Pane on the left of your screen allows you to quickly move between sections of the document – click any heading to jump directly to that section. To open the Navigation Pane, click the **View** tab in the ribbon at the top of your screen, select the check box beside **Navigation Pane**.

Information Icons

Information icons are included throughout this document and other BC Bid Guides to provide additional context and navigation support.



This icon indicates important information – either instructions that will have impact further ahead in the process or additional information or context for a process.



This icon indicates additional information about or related to a process.



This icon indicates a link to a video clip demonstrating a function.

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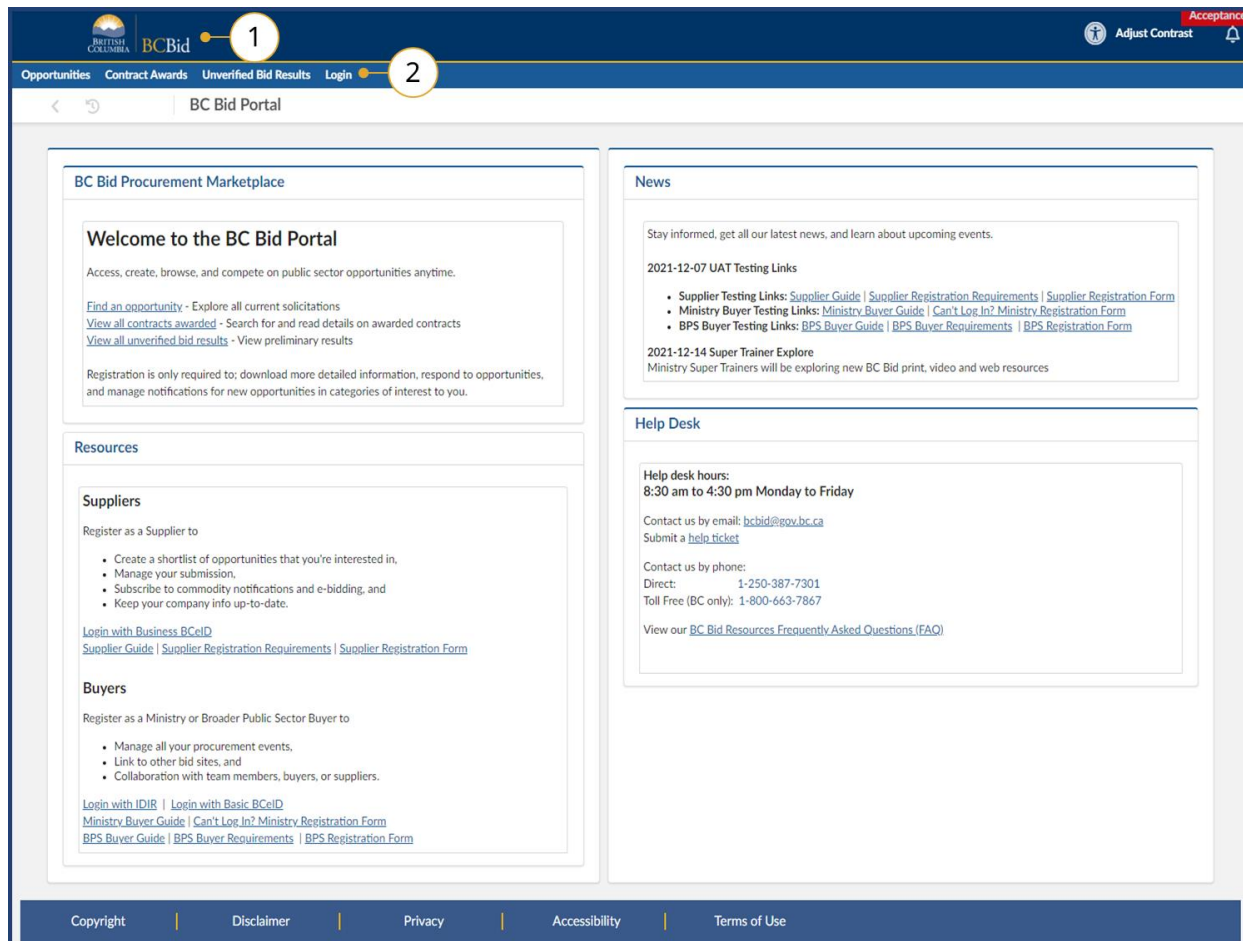
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Reset Password

Your BC Bid username and password is your IDIR username and password. If you require your password to be reset, contact 77000, 250-387-7000 or toll free 1-866-660-0811.

Login



1. Navigate to the [BC Bid Public Portal](#).
2. Click **Login**.

Log in to sfstest7.gov.bc.ca

Log in with IDIR

IDIR Username

Password

Continue

Or log in with:

Log in with BCeID

Need help?

Contact your IDIR security administrator or the 7-7000 Service Desk at:

Phone: 250-387-7000
Email: 77000@gov.bc.ca

Access to or unauthorized use of data on this computer system by any person other than the authorized employee(s) or owner(s) of an account is strictly prohibited and may result in legal action against such person.

[Disclaimer](#) | [Privacy](#) | [Accessibility](#) | [Copyright](#)

3. Enter **IDIR Username** and **Password**.
4. Click **Continue**.

You will be directed to the Buyer Portal dashboard.



[Login and Buyer Dashboard](#)

Registration

Opportunities Contract Awards Unverified Bid Results Login

Buyer Registration

2 Submit Cancel

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.

Personal Information 1

BASIC BCeID REQUIRED
A Basic BCeID account or BC Government IDIR is required to complete your BC Bid registration.
Need a Basic BCeID? [Register](#) and then return to this page.

First name *

Last name *

Position/Title *

Telephone (E.g. 1-777-888-9999 ext 1234) *

E-mail Address *

Address

Map Satellite

EUROPE
AFRICA
Atlantic Ocean

Privacy - Terms

There are a few situations where you may need to take steps to register:

- You may have moved position in the B.C. government;
- Your name has changed; or
- You are a contractor with a new IDIR or BCeID.

In these cases, you should first confirm that you have a functioning IDIR. Then you will need to fill out the Buyer Registration Form. The BC Bid Help Desk will review your submission.

1. Complete the **Buyer Registration** form.
2. Click **Submit**.
3. The BC Bid Help Desk will review and process registrations.

My Saved Pages (New for 2025)

Within the BC Bid application, you have the option to save any page that you frequently visit, so that you can easily revisit the page as needed.

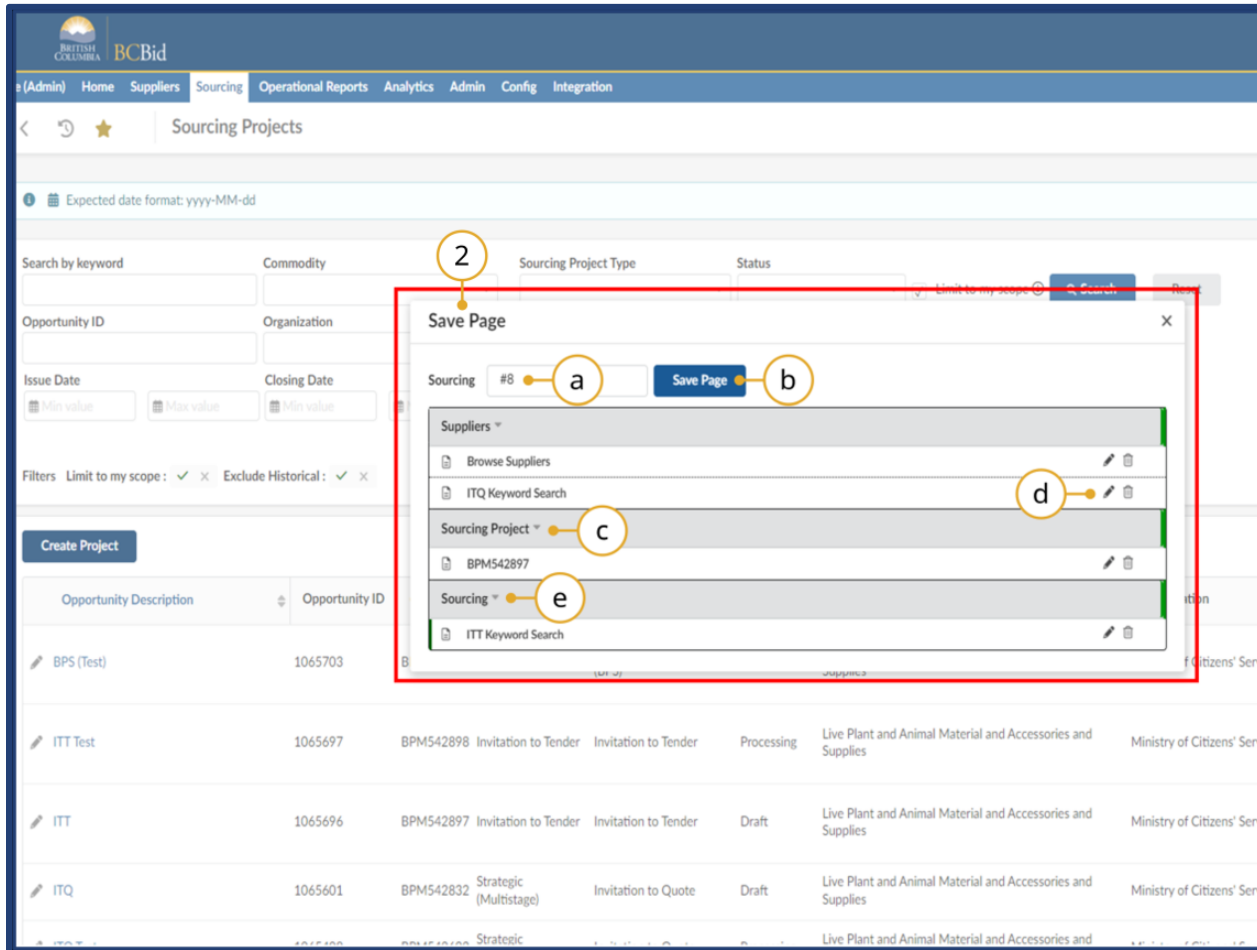
Star Icon (Save Page)

The screenshot shows the BC Bid application interface. At the top, there is a navigation bar with the BC Bid logo and several menu items: Home (Admin), Home, Suppliers, Sourcing, Operational Reports, Analytics, Admin, Config, and Integration. Below the navigation bar, there is a breadcrumb trail: < > ⌕ ⭐ 1 Sourcing Projects. The star icon is circled with a red '1'. Below the breadcrumb trail, there is a section for filters. It includes a search bar, a dropdown for 'Commodity', a dropdown for 'Sourcing Project Type', a dropdown for 'Status', a checkbox for 'Limit to my scope', a dropdown for 'Opportunity Type', a dropdown for 'RFX Status', a date range selector for 'Issue Date' and 'Closing Date', a dropdown for 'Opportunity Type on Historical Records (Apr 1, 2015 - Dec 15, 2022)', and a checkbox for 'Exclude Historical'. Below the filters, there is a 'Create Project' button. At the bottom, there is a table of sourcing projects.

Opportunity Description	Opportunity ID	Code	Project Type	Opportunity Type	RFX Status	Commodity
BPS (Test)	1065703	BPM542904	BPS Sourcing	Request for Proposal (BPS)	Draft	Live Plant and Animal Material and Supplies
ITT Test	1065697	BPM542898	Invitation to Tender	Invitation to Tender	Processing	Live Plant and Animal Material and Supplies
ITT	1065696	BPM542897	Invitation to Tender	Invitation to Tender	Draft	Live Plant and Animal Material and Supplies
ITQ	1065601	BPM542832	Strategic (Multistage)	Invitation to Quote	Draft	Live Plant and Animal Material and Supplies
ITQ	1065600	BPM542832	Strategic	Invitation to Quote	Draft	Live Plant and Animal Material and Supplies

1. On any page within BC Bid you should see the **star icon** in the top left corner. Click on the icon to open the **Save Page** window. If the star is gold, this means that you are on a page that has been previously saved.

Save Page Window



2. Once the **Save Page** window is open there are a variety of things you can do:
 - a. Type in a custom name for your saved page into the text box here.
 - b. Click the **Save Page** button to save that page and add it to the list below.
 - c. Pages are grouped into categories based on where they are in BC Bid.
 - d. Click the **pencil icon** to edit or the **trashcan icon** to delete a saved page.
 - e. Click the small grey arrow beside a category label to minimize each dropdown.

Save Text Fields

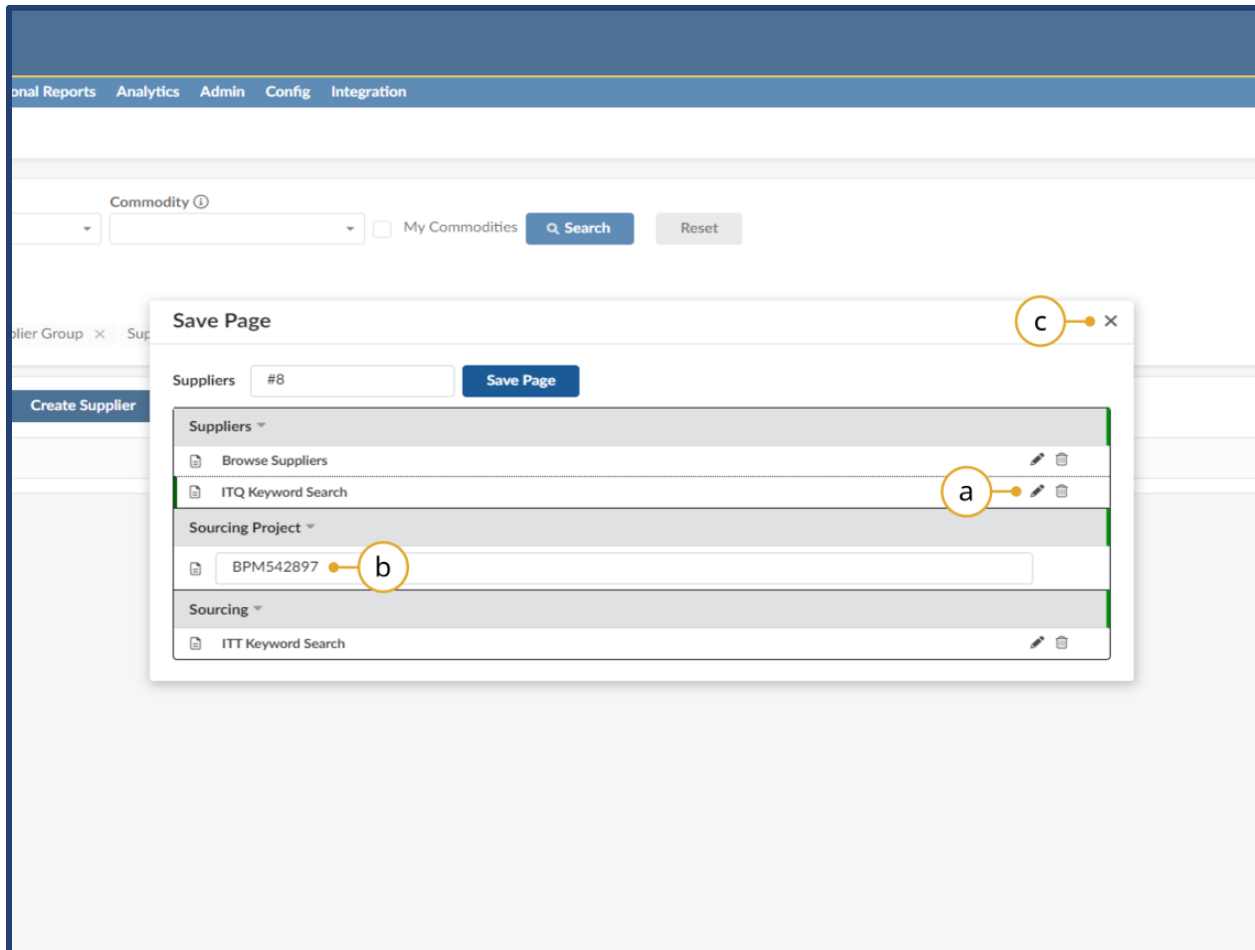
The screenshot shows the 'Browse Suppliers' page in the BC Bid system. The page has a dark blue header with the BC Bid logo and navigation tabs: Home (Admin), Home, Suppliers, Sourcing, Operational Reports, Analytics, Admin, Config, and Integration. Below the header, there's a breadcrumb trail: < > ⌚ ⭐ b Browse Suppliers. The main content area has a search bar with 'ITQ' entered, a 'Search' button, and a 'Reset' button. There are also dropdowns for 'Alerts' and 'Commodity'. Below the search bar, there's a 'Type' dropdown and a 'Filters' section with 'Search by keyword: ITQ' and several filter tags: Level: Supplier Group, Supplier Company, and Supplier Site. At the bottom, there's a 'Selected' count of 0, a 'Merge Suppliers' button, and a 'Create Supplier' button. The page also shows '0 Record(s)'.

Annotations in the image:

- a**: Points to the search keyword field containing 'ITQ'.
- b**: Points to the star icon in the breadcrumb trail.

3. As you are saving pages in BC Bid, pages with text fields can have the entered text in the fields saved as well. This is useful for search pages, where you can save keyword searches such as ITQ, RFP, ITT etc.
 - a. Type the desired text into the search parameters.
 - b. Click the **star icon** to save the page. Once saved, when you revisit the page, the text fields that were saved will also populate as well.

Editing Saved Pages



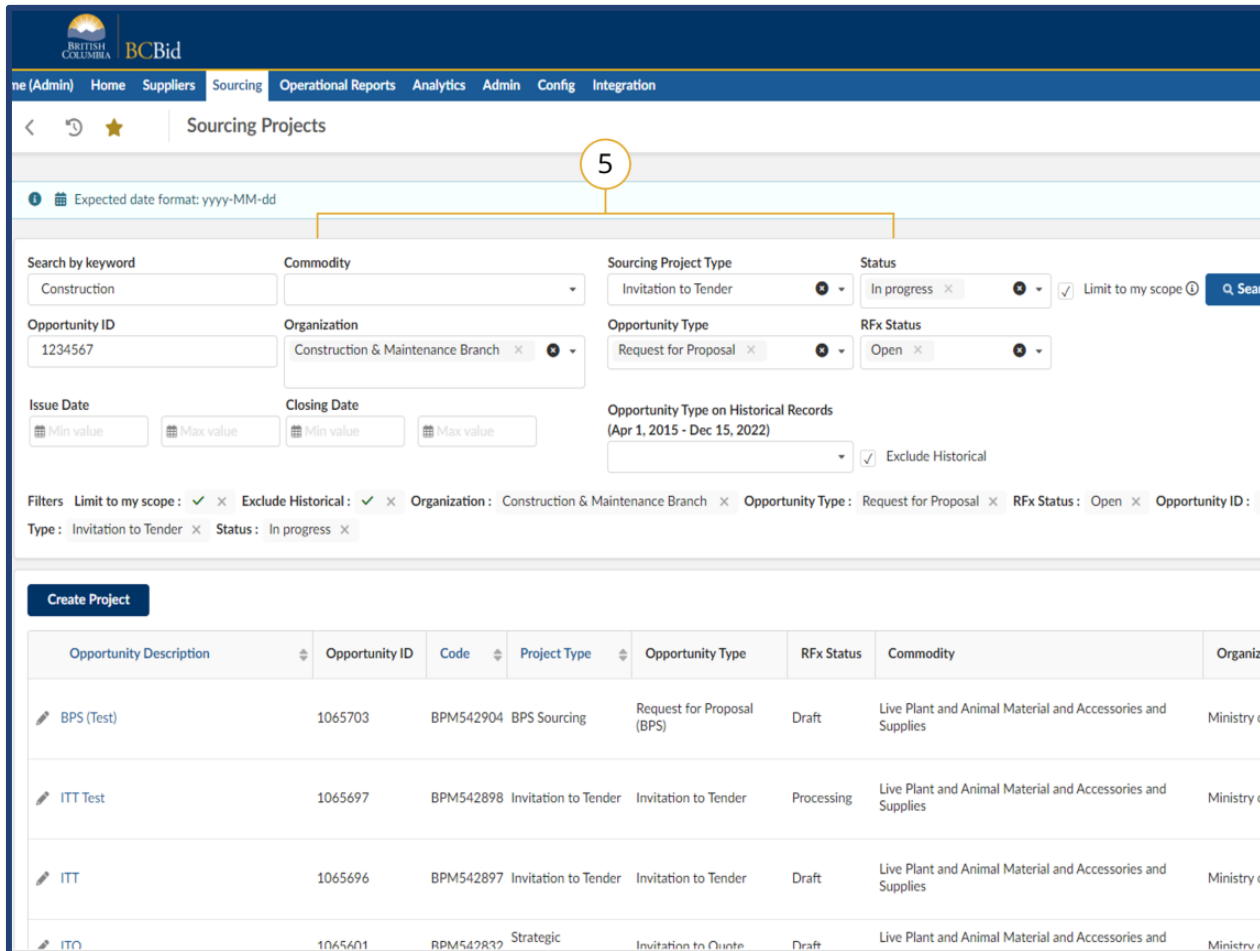
4. When you are within the **Save Page** window, you can edit and adjust the saved names of pages you've already created as needed.

a. Click the **pencil icon** to edit the name of a saved page.

b. The **text box** on the name will open and you can adjust the name as needed

c. Click the **x** in the top right corner to leave the Save Page window.

My Saved Pages - Keyword Searches



Expected date format: yyyy-MM-dd

Search by keyword: Construction

Opportunity ID: 1234567

Issue Date: Min value Max value

Closing Date: Min value Max value

Commodity: [Dropdown]

Organization: Construction & Maintenance Branch

Sourcing Project Type: Invitation to Tender

Opportunity Type: Request for Proposal

Opportunity Type on Historical Records (Apr 1, 2015 - Dec 15, 2022): [Dropdown]

Status: In progress

RFX Status: Open

Limit to my scope

Exclude Historical

Organization: Construction & Maintenance Branch

Opportunity Type: Request for Proposal

RFX Status: Open

Opportunity ID: 1234567

Type: Invitation to Tender

Status: In progress

Create Project

Opportunity Description	Opportunity ID	Code	Project Type	Opportunity Type	RFX Status	Commodity	Organization
BPS (Test)	1065703	BPM542904	BPS Sourcing	Request for Proposal (BPS)	Draft	Live Plant and Animal Material and Accessories and Supplies	Ministry of
ITT Test	1065697	BPM542898	Invitation to Tender	Invitation to Tender	Processing	Live Plant and Animal Material and Accessories and Supplies	Ministry of
ITT	1065696	BPM542897	Invitation to Tender	Invitation to Tender	Draft	Live Plant and Animal Material and Accessories and Supplies	Ministry of
ITQ	1065601	BPM542892	Strategic	Invitation to Quote	Draft	Live Plant and Animal Material and Accessories and Supplies	Ministry of

5. One of the main benefits of the 'My Saved Pages' functionality is that users can save keyword searches as needed. This is a chance to fill in search parameters with your most searched keywords and then save that page. When you revisit the saved page, your keywords will remain allowing you to easily access your most used searches.

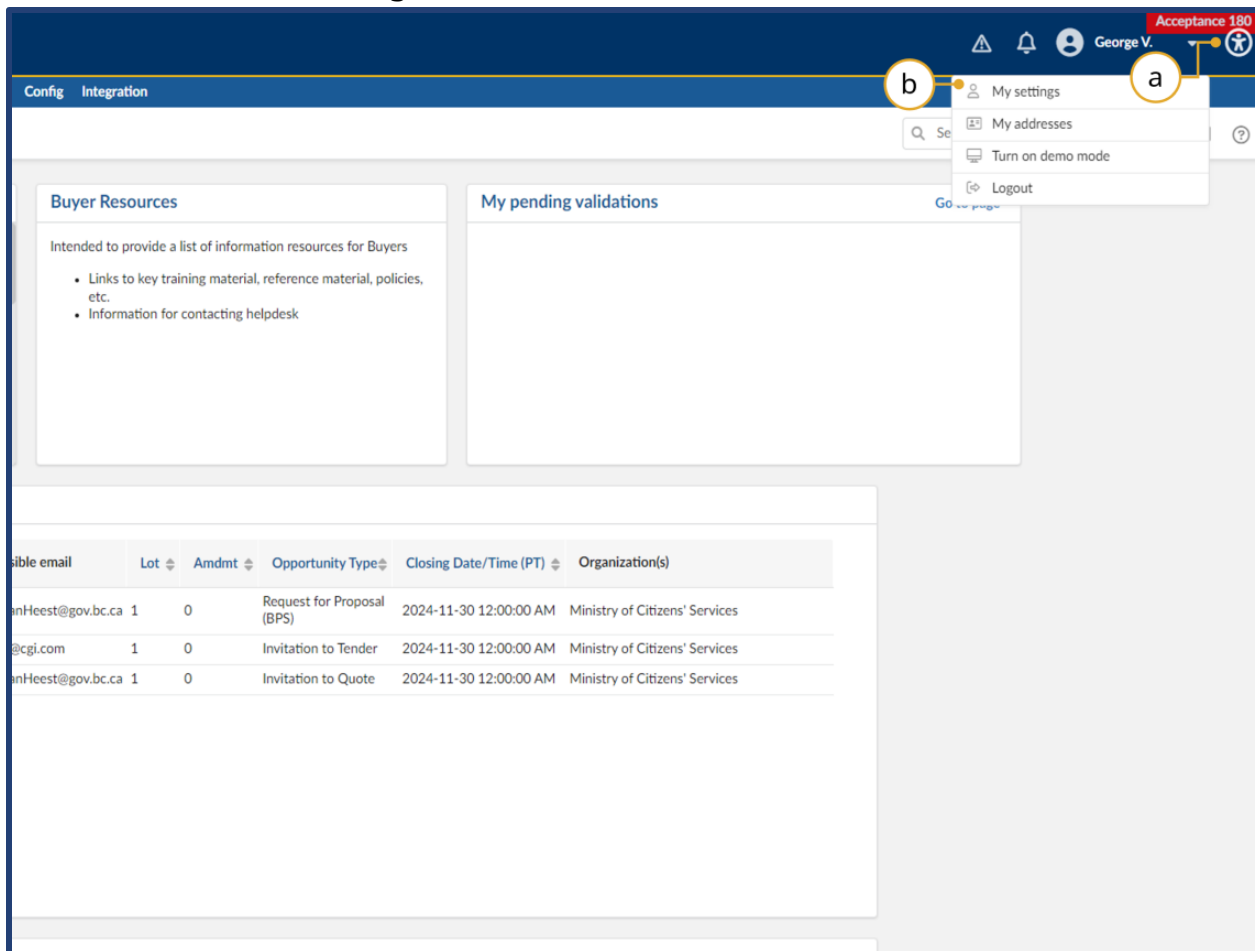
You can search based on the following:

- Keyword
- Sourcing Project Type
- Status
- Opportunity ID
- Organization
- Opportunity Type
- RFX Status

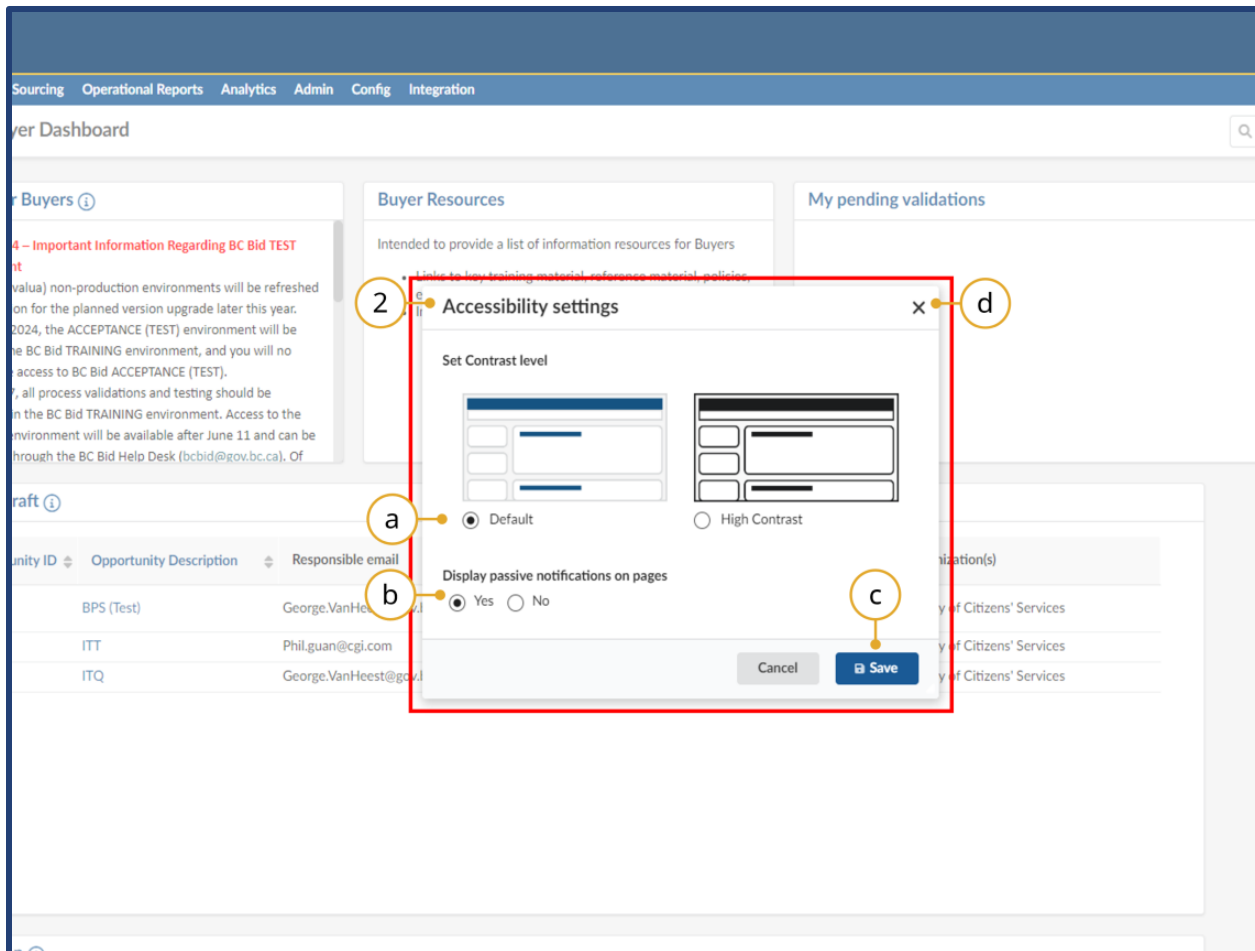
Accessibility Features (New for 2025)

In the BC Bid application you can toggle accessibility features in 2 different ways. Contrast can be adjusted and passive notifications can be turned off.

Please Note: The accessibility icon is now in the top right hand corner of the BC Bid application. Older screenshots may show this symbol located in another area. We have not updated every single screenshot, but it will now be in the top right (it can also be turned off in the settings).



1. There are 2 ways to access accessibility settings.
 - a. Click the **circular symbol** in the top right hand corner.
 - b. Click on your name and click on my **settings** in the drop-down menu.



2. The **accessibility settings** window will open after clicking on the circular icon in the top right hand corner.
 - a. Here you can adjust **contrast settings** between the default and high contrast modes.
 - b. You can turn **passive notifications** (blue) on or off in this section.
 - c. Always click **Save** to save your updated settings choices.
 - d. *Optional:* Click the **x** to exit this menu without saving, if you simply need to close it.

Home (Admin) Home Suppliers Sourcing Operational Reports Analytics Admin Config Integration

My settings : George VAN HEEST

Save

Profile

General preferences 3

Orga. perimeter

Commodity perimeter

Delegations

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time. Expected date format: yyyy-MM-dd

Accessibility Settings a

High contrast level b

Display passive notifications on pages c

Display the contrast settings button in header d

My preferences

Time Zone
(UTC -08:00) Pacific Time (US and Canada)

Name format
First Name Last name

Date format
yyyy-MM-dd h:mm tt

Number format
-1,234,567.89

Customized number format

Page size (PBI export) ⓘ
Letter

3. After clicking on your name in the top right hand corner, and clicking on **My Settings**, you will be taken to the My Settings page. Click on **General Preferences** on the left hand side.

a. Under the **Accessibility Settings** you can make adjustments to certain features.

b. You can turn **high contrast** on by checking this box.

c. You can chose to turn off **passive (blue) notifications** but unchecking this box.

d. You can chose to hide the **circular accessibility settings icon** from the top right hand corner of BC Bid by unchecking this box.

Note: Please save your settings after any changes by clicking the save button.

Buyer Portal

Home – Buyer Dashboard

The screenshot shows the BC Bid Buyer Dashboard. The top navigation bar includes 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The 'Home' tab is selected. The dashboard is divided into several sections:

- Left Sidebar:** Contains icons for 'Sourcing Projects', 'Create a Sourcing Project', 'Create a Contract Award', 'Programs', 'Qualified Supplier Lists', and 'Suppliers'.
- Top Right:** Includes a user profile icon (callout f), 'Adjust Contrast', a bell icon, and the date 'Monday N.'.
- Main Content Area:**
 - News for Buyers (callout b):** Contains an 'Important Note to Testers' and a list of jobs.
 - Buyer Resources (callout c):** Lists links to training material, reference material, policies, etc.
 - My pending validation (callout e):** A section for pending validations.
 - RFX in Draft (callout d):** A table of draft opportunities.

Opportunity ID	Opportunity Description	Responsible email	Lot	Amdmt	Opportunity Type	Closing Date/Time (PT)	Organization(s)
158049	Purchase of Picnic Tables	Lauren.Pinkerton@gov.bc.ca	2	0	Invitation to Quote	2022-05-27 2:00:00 PM	BC Parks - Provincial S Ministry of Citizens' Se Ministry of Environmen Change Strategy
155747	Content Development 2022 02 25 - Chainsaws	Lauren.Pinkerton@gov.bc.ca	1	0	Invitation to Quote	2022-03-11 2:00:00 PM	BC Wildfire Service Ministry of Citizens' Se
155437	Four Mountain Snowmobiles - response form sample	Lauren.Pinkerton@gov.bc.ca	1	0	Invitation to Quote	2022-04-30 2:00:00 PM	Ministry of Citizens' Se Ministry of Environmen Change Strategy
155215	ITQ	Monday@November.com	1	0	Request for Proposal	2022-03-22 6:00:00 AM	O63 Reconsideration Procurement Services
22859	Sample Opportunity	Lauren.Pinkerton@gov.bc.ca	3	0	Invitation to Quote	2022-03-31 2:00:00 PM	Ministry of Citizens' Se Procurement Services

At the bottom of the dashboard, there are links for '[Admin settings]', '[Page settings]', '[Site map]', and '[Legal mentions]'. The version 'BC Bid v1.2' is displayed in the bottom right corner.

1. Navigate to the **Home** tab to see the **Buyer Dashboard**.
 - a. Select a **Quick Access** button to navigate to quickly start a task in BC Bid.
 - b. Check the **News for Buyers** for important news about BC Bid.
 - c. Check **Buyer Resources** for important information.
 - d. Check **RFX in Draft** to review opportunities that are currently in draft format.
 - e. Check **My pending validations** to see if there are any validations pending approval.
 - f. This icon has shifted to now be located in the top right hand corner of the page. Adjust contrast here.

Note: Depending on your account permissions, you may see a slightly different dashboard.

Frequently Asked Questions (FAQs)

Q: What is the status of my purchase?

A: On the [Prepare RFx – Setup tab](#), look for the opportunity status. The Opportunity status typically occurs in the following order: Draft, Open, Closed, Processing, Complete.

Q: Why can't I see my opportunity in BC Bid?

A: When a requisition is received by Procurement Services Branch (PSB), it goes through an intake process/queue before being assigned to a PSB buyer. The PSB buyer will then add the Ministry client to the Set up team. The Sourcing Project will not be visible until users are added to the Set up Team by the PSB buyer.

Q: Who at PSB is responsible for my purchase?

A: On the [Set up Team](#) tab of the opportunity, look for the person with the **Responsible** role.

Q: How can I have other people from my branch/office added to the project?

A: In the [Discussion Forum](#), send a message to the PSB employee in the Responsible role asking to have the person added to the [Set up Team tab](#).

Q: When will my opportunity close?

A: The closing date/time is visible on the [Prepare RFx – Setup tab](#). If your opportunity is in **draft** status, both the issue and closing date may be changed before the opportunity is issued.

Q: I have been asked to review the draft opportunity. What do I look at?

A: You should review the information on the Prepare RFx tab. Specifically the [Setup](#), [Additional RFx Info](#), [Documents](#), [Item](#) and [Requirements](#) tabs. This ensures that everything from the requisition is included in the ITQ.

Q: What is the goods delivery date indicated to the suppliers?

A: The requested delivery date is listed on the [Prepare RFx Items tab](#). This comes from the Corporate Financial System (CFS) issued requisition.

Q: How are Direct Awards processed in BC Bid?

A: [Direct Awards](#) are issued as ITQs to the supplier indicated (they are not posted publicly). The supplier will have to complete a response to the ITQ and submit it before the ITQ closing date.

Q: Where are the supplier submissions located?

A: Supplier submissions are only visible after an opportunity has closed and the submissions have been unsealed by the person with the Responsible role. The opportunity will be in Processing status if the opportunities are available to be viewed. See [View Supplier Submissions](#).

Q: What suppliers have seen my opportunity?

A: When suppliers are logged into BC Bid and select the Start Submissions button, they will be added to the Supplier tab and the View RFx activity tab. See [Prepare RFx Supplier tab](#) and [View RFx Activity](#). There is no tracking of suppliers who access the BC Bid Public Portal or who view the opportunity without selecting the Start Submissions button.

Q: Why can't I see the supplier submissions?

A: Once the closing date/time has passed, the PSB buyer or the PSB admin need to enter submissions received outside of BC Bid. Once those submissions have been entered, the person with the responsible role will need to unseal the submissions.

Q: What documents are included in my opportunity?

A: Documents are found in two different places. Documents related to the Sourcing Project are located on the [Documents](#) tab. Documents are also assigned to the ITQ and they are located on the [Prepare RFx Documents](#) tab. Documents can be in draft or approved status. Suppliers and Read-only buyers can only see Approved documents. When documents are imported from CFS, they are imported in draft status.

Q: How is the Purchase Order (PO) issued?

A: Through BC Bid, the PSB buyer is able to send the award information directly to CFS. This provides information to CFS, including: the successful supplier, the line item amounts, and the total award amount. The PSB buyer will notify the

successful supplier and the Ministry buyer is responsible for sending a copy of the Purchase Order. See [Appendix 3: ITQ Requisition and PO Process Overview](#).

Q: What does the supplier see when looking at the ITQ?

A: To see the public view of an opportunity, check the [BC Bid Public Portal](#). If the opportunity is still in draft, go to the [Prepare RFX Items](#) or [Prepare RFX Requirements](#) tabs and click on **Preview**.

Q: What is required for the supplier's submission to be compliant?

A: For a supplier's submission to be considered, it must meet the requirements listed in the **Mandatory Criteria** section. For buyers (PSB and Ministry) this is contained on the [Additional RFX Info tab](#). Suppliers will see this information on the **Opportunity Details** tab. Once the Mandatory Criteria is met, a submission is evaluated against the stated specifications.

Requisition Import

The CFS requisition is imported automatically to BC Bid after the Ministry's Expense Authority (EA) has approved it. The requisition requester and the requisition preparer will receive a confirmation email that the import was successful. The notification email will contain the requisition number (from CFS) and the requisition ID (a unique CFS number). The requisition ID is what is used to search for the number in BC Bid.

The requisition information from CFS will automatically populate a draft ITQ opportunity which the PSB buyer will update before issuing it on BC Bid for supplier responses. The PSB buyer will add the Ministry client(s) to the Set up Team tab. Until the Ministry client(s) are added to Set up Team, the project won't be visible to the Ministry.

The PSB buyer may request the Ministry preparer/requestor make an amendment to the requisition to edit or add line items.

Search for Opportunities

The screenshot shows the BCBid Ministry User Guide interface. The top navigation bar includes 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The 'Sourcing' menu is expanded, showing options like 'Sourcing Projects', 'Create Sourcing Project', 'Qualified Supplier Lists', 'Programs', 'Contract Awards', 'My Contract Award Notices', 'Create Contract Award Notice', and 'Unverified Bid Results'. A red circle with the number '1' highlights the 'Sourcing Projects' option. Below the menu, there are sections for 'Buyer Resources' and 'RFx in Draft'. The 'RFx in Draft' section contains a table with columns: Opportunity ID, Opportunity Description, Responsible email, Lot, Amdmt, Opportunity Type, Closing Date/Time (PT), and Org.

Opportunity ID	Opportunity Description	Responsible email	Lot	Amdmt	Opportunity Type	Closing Date/Time (PT)	Org
5076810	Bricks for Superior Street Project	Lauren.Pinkerton@gov.bc.ca	1	0	Invitation to Quote	2022-10-05 2:00:00 PM	
485960	Bricks for Superior Street Project	Lauren.Pinkerton@gov.bc.ca	2	0	Invitation to Quote	2022-09-22 12:00:00 AM	
485722	Purchase of Dog Food and Treats	Lauren.Pinkerton@gov.bc.ca	7	0	Invitation to Quote	2022-09-09 12:00:00 AM	Pro
484256	test	Lauren.Pinkerton@gov.bc.ca	1	0	Invitation to Quote	2022-04-22 7:46:19 AM	
155747	Content Development 2022 02 25 - Chainsaws	Lauren.Pinkerton@gov.bc.ca	1	0	Invitation to Quote	2022-03-11 2:00:00 PM	

At the bottom of the page, there are links for [Admin settings], [Page settings], [Site map], and [Legal mentions]. The version number 'BC Bid v1.3' is also displayed.

1. On the main menu select **Sourcing**, then **Sourcing Project** or click **Sourcing Projects** on the Buyer Dashboard.



[Exploring Opportunities](#)

The screenshot shows the 'Sourcing Projects' interface. At the top, there's a navigation bar with 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. Below this is a search bar and a list of filters: 'Search by keyword', 'Commodity', 'Sourcing Project Type', 'Status', 'Opportunity ID' (with value 5076807), 'Organization', 'Opportunity Type' (with value 'Invitation to Quote'), and 'RFx Status'. A 'Limit to my scope' checkbox is checked. The 'Search' button is highlighted with a blue circle and a magnifying glass icon. Below the filters, there's a 'Filters' section showing the current search criteria. A 'Create Project' button is visible. The main table lists search results, with one result shown: 'Bricks for Superior Street Project' with details like Opportunity ID 5076807, Code BPM249144, Project Type Strategic (Multistage), Opportunity Type Invitation to Quote, RFx Status Deleted and Processing, Date Created 2022-09-02, Commodity Bricks, and Organization Finance and Citizens Services / Procurement Services Branch. The footer contains links for 'Admin settings', 'Page settings', 'Site map', and 'Legal mentions', along with the version 'BC Bid v1.3'.

2. In one or multiple searchable fields, enter text or use the drop-down lists to filter the search.
 - a. Enter the requisition ID from the import notification in the Opportunity ID field
 - b. Click **Search**.
3. Select the **Label** or **Pencil Icon** to view the Sourcing Project.
4. To start a new search, click **Reset**.

Filters: There are 2 filters. Limit to my scope limits the scope of the search to Sourcing Projects that the user is a member of the team for. Unselecting this checkbox will show more results. Include historical will allow you to search historical data as well, otherwise it will be excluded by default.

Note: More than one opportunity type can be selected in the opportunity type drop down menu.

View Sourcing Project

A Sourcing Project refers to one or multiple opportunities linked through lots or stages of an opportunity. An Opportunity refers to a specific opportunity within a Sourcing Project. Sourcing Project information is imported automatically from the CFS requisition.

Set up Project

The screenshot shows the 'Set up Project' form for a sourcing project. The form is titled 'Sourcing project: BPM249144 - Bricks for Superior Street Project - Set up Project'. The form contains several sections: 'General Information' with fields for Code (BPM249144), Sourcing Project Type (Strategic (Multistage)), Status (In progress), Opportunity Description (Bricks for Superior Street Project), Date Created (2022-09-02), Confidential Sourcing Project checkbox, Issued By (Procurement Services Branch), Issued For (Finance and Citizens Services), Main Commodity (30131600 - Bricks), and Program (ITQ_PSB - PSB: ITQ for Goods). Other Commodities are listed below. A sidebar on the left shows navigation options like 'Set up Project', 'Set up Team', 'Discussion Forum', 'Set up Documents', 'Add Suppliers', 'Prepare RFx', 'View RFx activity', 'Interested Supplier List', 'Analyze & Award', and 'Notify & Share'. The bottom of the page has links for [Admin settings], [Page settings], [Site map], [Legal mentions], and the version 'BC Bid v1.3'.

1. Click on **Set up Project**, information includes:
 - a. **Project Status** – the default status will default to **In progress**.
 - b. **Description** – this is the title of the requisition. The PSB buyer can edit the title.
 - c. Issued by/for – Issued by will default to **Procurement Services Branch**. The Issued for will display the Ministry/Branch requesting the purchase.
 - d. **Commodity codes** – as imported from the requisition. The PSB buyer can edit the commodity codes.

Set up Team

The team members and their roles are listed on the Set up Team tab. The PSB buyer overseeing the opportunity will have the Responsible and Official Contact roles.

Home Suppliers Sourcing Operational Reports

Sourcing project: BPM249144 - Bricks for Superior Street Project - Set up Team

Set up Team

Team

Official Contact: is the single contact that suppliers can communicate with about the opportunity. Messages from Suppliers will be received within the Discussion Forum if sent through BC Bid. Email notifications sent to suppliers use the Official Contact (name and email). This role is set by default to the creator of the sourcing project but can be changed.

Responsible: has full access to update the sourcing project and can unseal a Submission.

Contributor: has access to edit the sourcing project, including creating offline Submissions (does not have access to update the set up team tab, unseal a Submission, or delete an RFx).

Read-only: has access to view the sourcing project and can leave comments.

Select user(s)

Email	Profiles	Contact
Monday@November.com	Read-only	NOVEMBER Monday
Lauren.Pinkerton@gov.bc.ca	Official Contact, Responsible	PINKERTON Lauren

[Admin settings] [Page settings] [Site map] [Legal mentions] BC Bid v1.3

1. Click on the **Set up Team** tab in the opportunity.
2. The team members names are listed.
3. The profiles are assigned to each team member.
4. The person with the Responsible role can add other members to the team.
5. The person with the Official Contact role (usually the same as the Responsible role) will receive communication from suppliers while the opportunity is open.



[Set up Team](#)



The requisition preparer/requestor (Ministry buyer) are assigned the read-only role. The person with the responsible role can add additional members to the team.

Discussion Forum

The Discussion forum allows members of the team to communicate with each other. The person with the Official Contact role will be able to receive enquiries from suppliers.

The screenshot shows the BCBid web application interface. The top navigation bar includes 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The left-hand menu is expanded, showing options like 'Set up Project', 'Set up Team', 'Discussion Forum' (highlighted with a red circle and the number 1), 'Set up Documents', 'Add Suppliers', 'Prepare RFx', 'View RFx activity', 'Interested Supplier List', 'Analyze & Award', and 'Notify & Share'. The main content area is titled 'Discussion Forum' and contains a 'Recover Messages' button, a search bar, and filters for 'Supplier', 'Message Type', 'User', and 'Date'. A 'Compose' button is located at the bottom left of the main content area. The footer includes links for 'Admin settings', 'Page settings', 'Site map', and 'Legal mentions', along with the version number 'BC Bid v1.2'.

1. In the left-hand menu click **Discussion Forum.**

The Discussion Forum is used for internal communication among buyers and external communication between the Official Contact and suppliers. It is also used to issue Addenda.



[How to use the Discussion Forum](#)

Create a New Message

The screenshot shows the BC Bid system interface. The top navigation bar includes 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The user is logged in as 'Lauren P.' with an 'Acceptance' status. The main content area is titled 'Discussion Forum' for the project 'BPM085313 - Purchase of Bricks'. It includes a 'Recover Messages' button and a search section with fields for 'Search by keyword', 'Display', 'Supplier', 'Message Type', 'User', and 'Date'. A 'Compose' button is located at the bottom left of the message history section, highlighted with a red circle and the number 1. The footer contains links for 'Admin settings', 'Page settings', 'Site map', and 'Legal mentions', along with the version 'BC Bid v1.2'.

1. Click **Compose**.

The message box will display on the right side of the screen.

2. The **Message Type** will default to **Enquiries**.
3. *Optional:* Select the **Send me a copy** checkbox to receive a copy of the message by email.
4. In the **To** section:
 - a. In the **Recipients** drop-down list, select the individual or role category to send the message to.
 - b. In the **Subject** field, enter the subject of the message.
 - c. In the message text box, enter the content of the message.
 - d. In **Click or Drag to add files**, add any related attachments.
 - e. Click **Send**.

Note: Ministry buyers should only be sending communication to the Internal Team.

View a Message

The screenshot displays the BCBid system interface for viewing a message. The top navigation bar includes links for Home, Suppliers, Sourcing, and Operational Reports. The main content area is titled "Sourcing project: BPM085313 - Purchase of Bricks - Discussion Forum". The left sidebar contains various project management tasks. The main content area is divided into two sections: "Specifications" and "Enquiries". The "Specifications" section shows a message from "Pinkerton Lauren" dated "2022-04-06" at "11:23:35 AM". The message content is visible, and the recipients are listed as "All internal team members". A "Message History" button is located below the message content. At the bottom, a table lists the message history with columns for Time, Original sender, and Last sender.

Time	Original sender	Last sender
11:23:35 AM	Lauren PINKERTON	Lauren PINKERTON

1. Select the message by clicking on any part of it.
2. Review the message on the right side of the screen (side-to-side scrolling may be needed). The message content will include:
 - a. Who the message was from.
 - b. Date and time the message was sent.
 - c. Recipients of the message.
 - d. Message content.
 - e. *Optional*: View any attachments included with the message.

Set up Documents

Documents can be added at the project level (Set up Documents) and at the opportunity level (Prepare RFx – Documents). Documents listed here may be internal or external. For a document to be visible to a supplier it needs to be in approved status and added to an opportunity. General and Project documents lists contain general reference documents for the buyers (e.g., government templates). Documents related to the Sourcing Project are listed under Sourcing Project Documents.

The screenshot shows the BCBid web application interface. The top navigation bar includes 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The main content area is titled 'Set up Documents' for the sourcing project 'BPM085313 - Purchase of Bricks'. It displays three document categories: 'General Documents', 'Program Documents', and 'Sourcing Project Documents'. The 'Sourcing Project Documents' section is expanded, showing a search bar and a table of documents. The table has columns for Title, Attachment, Contact, Last Modification, Created on, and Validity End Date. Two documents are listed: 'Specifications' and 'Delivery Instructions'. A bracket labeled 'a' points to the document table.

Title	Att.	Contact	Last Modification (Pacific Time)	Created on (Pacific Time)	Validity End Date
Specifications	specifications.docx	PINKERTON Lauren	2022-04-06 11:32:33 AM	2022-04-06 11:32:33 AM	
Delivery Instructions	Delivery Instructions.pdf	PINKERTON Lauren	2022-04-06 1:34:48 PM	2022-04-06 1:34:48 PM	

1. Click on Set up Documents.
2. Under the Sourcing Project Documents, see the related documents
 - a. Documents will need to be in approved status for users with the Read-only role to view them

Note: Documents imported from the requisition will be in draft status until the PSB buyer updates the status.

View Opportunity

BRITISH COLUMBIA BCBid

Home Suppliers Sourcing Operational Reports

Sourcing project: BPM249146 - Bricks for Superior Street Project - Prepare RFX

Set up Project

Set up Team

Discussion Forum

Set up Documents

Add Suppliers

Prepare RFX

View RFX activity

Interested Supplier List

Analyze & Award

Notify & Share

Selected Lot - Amendment*

Lot : 1 - Amendment : 0 - Bricks for Superior Street Project (Draft)

View as Supplier

Setup Additional RFX Info RFX Process Rules Documents Suppliers Item Requirements Scoring Approvals

Prepare RFX - Setup

RFX Settings

Opportunity ID

5076811

RFX Status

Draft

Opportunity Type

Invitation to Quote

Opportunity Description

Bricks for Superior Street Project

Lot # ①

1

Amendment # ①

[Admin settings] [Page settings] [Site map] [Legal mentions]

BC Bid v1.3

1. To view an opportunity within a Sourcing Project, click on **Prepare RFX**.
2. Use the **Lot/Amendment** drop-down to select the desired opportunity. All projects begin with Lot 1: Amendment 0.
 - a. The opportunity status will be in brackets at the end of the title.

Prepare RfX - Opportunity Details

Setup tab

BCBid

Home Suppliers Sourcing Operational Reports

Sourcing project: BPM249146 - Bricks for Superior Street Project - Prepare RfX

Set up Project
Set up Team
Discussion Forum
Set up Documents
Add Suppliers
Prepare RfX
View RfX activity
Interested Supplier List
Analyze & Award
Notify & Share

Selected Lot - Amendment*
Lot : 1 - Amendment : 0 - Bricks for Superior Street Project (Draft) View as Supplier

1 Setup Additional RfX Info RfX Process Rules Documents Suppliers Item Requirements Scoring Approvals

Prepare RfX - Setup

RfX Settings

Opportunity ID
5076811 a

RfX Status
Draft b

Opportunity Type
Invitation to Quote

Opportunity Description
Bricks for Superior Street Project c

Lot # 1

Amendment # 1

[Admin settings] [Page settings] [Site map] [Legal mentions] BC Bid v1.3

1. Click on the **Setup** tab. The Setup tab includes information such as:
 - a. **Opportunity ID** – the requisition ID from the CFS requisition.
 - b. **RfX Status** – the status of the opportunity
 - c. **Opportunity Description** – the name of the opportunity that is visible to suppliers.

The screenshot displays the BCBid system interface for a sourcing project. The top navigation bar includes the BCBid logo, a user profile icon, and a date indicator. The main navigation menu on the left lists various project management steps. The central form area is titled 'Sourcing project: BPM249146 - Bricks for Superior Street Project - Prepare RFx'. The form contains several input fields for project details. The 'Estimated Amount (CAD)' field is highlighted with a yellow circle and labeled 'd', and the 'Summary Details' field is highlighted with a yellow circle and labeled 'e'.

Field	Value
Opportunity ID	5076811
RFx Status	Draft
Opportunity Type	Invitation to Quote
Opportunity Description	Bricks for Superior Street Project
Lot #	1
Amendment #	0
Estimated Amount (CAD)	300,000.00
Category	Goods
Summary Details	Purchase of Bricks for Superior Street Project

- d. **Estimated amount** – the approval amount from the imported requisition. This is not visible to suppliers.
- e. **Summary Details** – a brief description of the opportunity that is visible to suppliers.

BCBid

Adjust Contrast

Monday N.

Acceptance

Home Suppliers Sourcing Operational Reports

Sourcing project: BPM249146 - Bricks for Superior Street Project - Prepare RFx

Set up Project

Set up Team

Discussion Forum

Set up Documents

Add Suppliers

Prepare RFx

View RFx activity

Interested Supplier List

Analyze & Award

Notify & Share

Additional CFS Information (not directly displayed to Supplier/Public) f

Set of Books: 69
Requisition Number: 43183

Contact Info Type: invoice
Address: 563 SUPERIOR ST 1ST FLR
PO BOX 9476 STN PROV GOVT
VICTORIA
BC
V8V 0C5
Contact Person: PINKERTON, LAUREN

Email: Lauren.Pinkerton@gov.bc.ca

Contact Info Type: shipto
Address: 563 SUPERIOR ST 1ST FLR
PO BOX 9476 STN PROV GOVT
VICTORIA
BC
V8V 0C5
Contact Person: PINKERTON, LAUREN

Email: Lauren.Pinkerton@gov.bc.ca

Buyer Notes 1: must be delivered by December 30

Buyer Notes 2: must be delivered by December 30

Buyer Notes 3: must be delivered by December 30

Contact Information from CFS (not directly displayed to Supplier/Public) g

Preparer Email: Lauren.Pinkerton@gov.bc.ca
Requestor Email: Lauren.Pinkerton@gov.bc.ca

[Admin settings] [Page settings] [Site map] [Legal mentions]

BC Bid v1.3 ©

- f. **Additional CFS Information** – information for the PSB buyer from the CFS requisition
- g. **Contact Information from CFS** – email address of the requisition requestor and preparer.

The screenshot displays the BC Bid system interface for a sourcing project. The top navigation bar includes the BC Bid logo, user profile, and status (Monday N.). The main menu on the left lists various project management steps. The central content area is titled 'Sourcing project: BPM249146 - Bricks for Superior Street Project - Prepare RFx'. Below this, the 'CFS Integration Information' section (marked with a red circle 'h') contains fields for CFS Order Type, CFS Requisition, CFS Purchase Order, Ministry, Responsibility, Account, STOB, and Project. The 'Issue Date and Closing Date (times are shown in Pacific Time)' section (marked with a red circle 'i') includes fields for Issue Date, Closing Date & Time, and Enquiries Deadline, along with checkboxes for 'Auto issuing', 'Auto closure', 'RFx to be pre-advertised', and 'NDA required from Suppliers'. A 'Visible to Public' section at the bottom has a checkbox for 'Post this opportunity publicly?'. The footer contains links for Admin settings, Page settings, Site map, and Legal mentions, along with the version number BC Bid v1.3.

CFS Integration Information h

CFS Order Type	CFS Requisition	CFS Purchase Order
Purchase Order	5076811	
Ministry	Responsibility	Account
032	32P01	35102
	STOB	Project
	5718	3200000

Issue Date and Closing Date (times are shown in Pacific Time) i

Issue Date i

2022-09-26 10:00:00 AM ☐ Auto issuing i

Closing Date & Time i

2022-10-06 2:00:00 PM ☒ Auto closure i

Enquiries Deadline i

12:00:00 AM

☐ RFx to be pre-advertised

☐ NDA required from Suppliers

Visible to Public

☒ Post this opportunity publicly?

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- h. **CFS Integration Information** – account coding from the CFS requisition used by PSB for reporting.
- i. The **Issue/Close** dates of the opportunity. When in draft, the Responsible person can change these fields before issuing the opportunity. They can also manually issue the opportunity before the date/time.

Additional RFX Info tab

The screenshot displays the BC Bid system interface for a sourcing project titled "BPM247733 - 12345 - Purchase of Custom Picnic Tables - Prepare...". The "Additional RFX Info" tab is selected, showing the "Prepare RFX - Additional RFX Info" section. The "Official Contact" field is highlighted with a red circle and labeled 'a'. The "Contact email" field is also highlighted with a red circle and labeled 'a'. The "Alternate email" field is highlighted with a red circle and labeled 'b'. The "Submissions" section is also visible, listing delivery methods.

Selected Lot - Amendment *

Lot : 1 - Amendment : 0 - Purchase of Custom Picnic Tables (Draft)

Setup Additional RFX Info 1 Process Rules Documents Suppliers Item Requirements Scoring Approvals Approval Workflow

Prepare RFX - Additional RFX Info

Official Contact a

Enquiries related to this RFX may only be directed in writing to the Official Contact using the "enquiries" interface, if available, or the email address identified on the "opportunity details" tab. Information obtained from any other source is not official and should not be relied upon. Other information and rules regarding enquiries are set out in the "process rules" tab or within the attached RFX documents.

Official Contact	Contact email
Lauren Pinkerton	Lauren.Pinkerton@gov.bc.ca

If you want to change who the Official Contact is, go to Set up Team to assign the role to another team member.

The email address on your buyer profile is displayed by default to suppliers. If you want to provide an alternate email account that you monitor (e.g. a generic procurement email account), please enter that here, and it will display instead of your personal email address.

Alternate email

procurement@gov.bc.ca

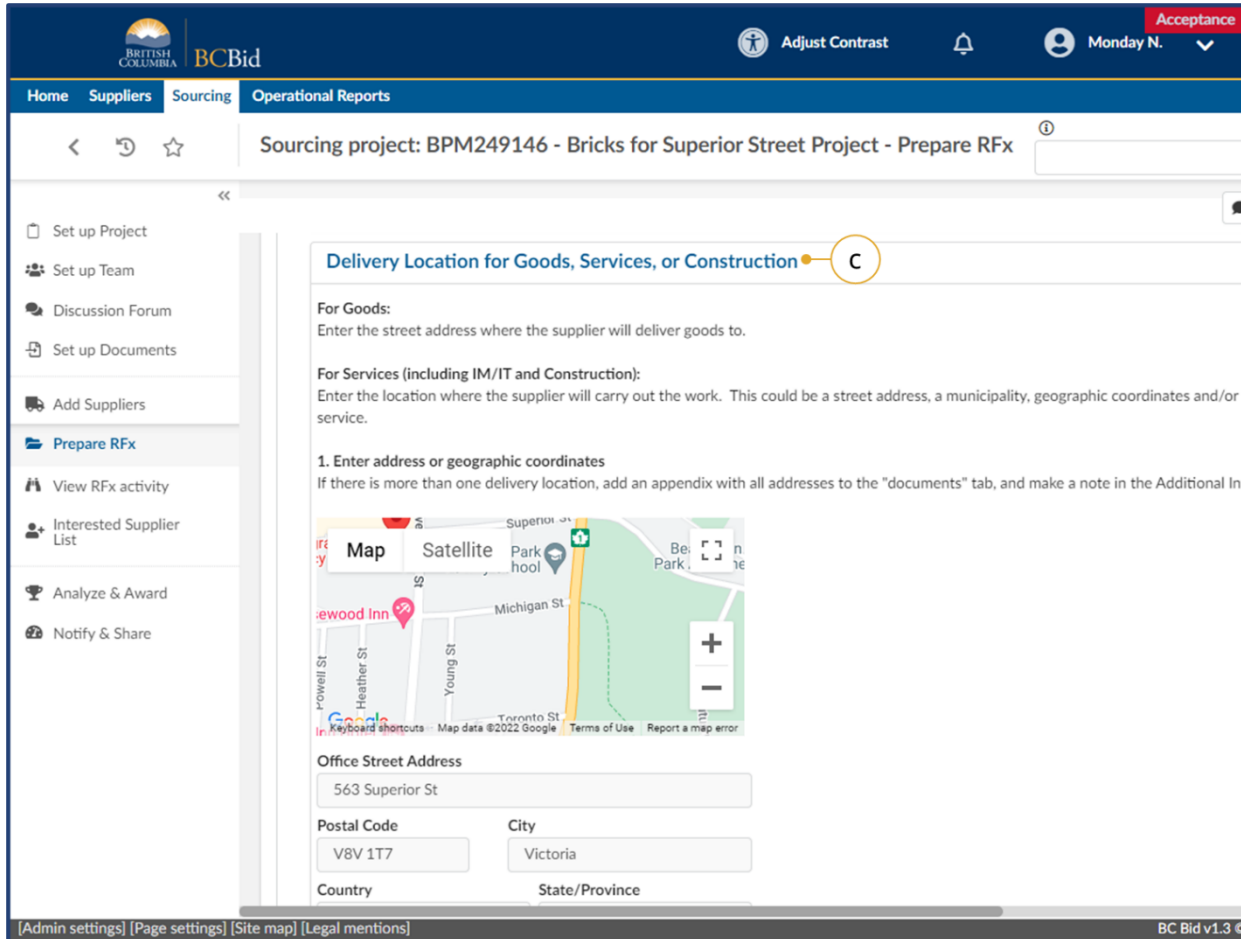
Submissions b

Submissions must be submitted using one of the following delivery methods

- ☒ BC Bid Electronic Submission: Submit an electronic Submission using BC Bid. Submissions must be in accordance with the requirements set out in the process rules for the subject RFX. Only pre-authorized electronic bidders registered on the BC Bid system can make an electronic Submission using the BC Bid system.
- ☒ Email Submission: Submit a Submission by email. Submissions by email must be submitted to the email address specified below in accordance with the email submission instructions set out in the process rules for the subject RFX. Include the opportunity description and ID in the subject line of the email.
- ☒ Fax Submission: Submit a submission by fax. Submissions must be faxed to 250-387-7309 or 250-387-7310 in accordance with the faxed submission instructions set out in the RFX Process Rules for the subject RFX.

[Admin settings] [Page settings] [Site map] [Legal mentions] BC Bid v1.2

1. Click on the **Additional RFX Info** tab. The Additional RFX info tab includes information such as:
 - a. **Official Contact** and **contact email** address for supplier enquiries. If the **Alternate email** field is completed, the contact email will not be displayed with the ITQ.
 - b. **Submission delivery** methods when suppliers respond to the opportunity.



Delivery Location for Goods, Services, or Construction C

For Goods:
Enter the street address where the supplier will deliver goods to.

For Services (including IM/IT and Construction):
Enter the location where the supplier will carry out the work. This could be a street address, a municipality, geographic coordinates and/or service.

1. Enter address or geographic coordinates
If there is more than one delivery location, add an appendix with all addresses to the "documents" tab, and make a note in the Additional Information section.

Map Satellite

Office Street Address
563 Superior St

Postal Code
V8V 1T7

City
Victoria

Country
State/Province

- c. View the **Delivery location** of the goods. This section includes the region where the goods will be delivered to and any additional information related to the delivery site.

BCBid

Adjust Contrast

Monday N.

Acceptance

Home Suppliers Sourcing Operational Reports

Sourcing project: BPM249146 - Bricks for Superior Street Project - Prepare RFx

Set up Project

Set up Team

Discussion Forum

Set up Documents

Add Suppliers

Prepare RFx

View RFx activity

Interested Supplier List

Analyze & Award

Notify & Share

Trade Agreements d

Trade Agreements apply?

☐ No

☒ Yes

Trade Agreement(s)

☒ The New West Partnership Trade Agreement

☒ The Canadian Free Trade Agreement

☐ Canada-European Union Comprehensive Economic and Trade Agreement

☐ Canada-United Kingdom Trade Continuity Agreement

☐ Comprehensive and Progressive Agreement for Trans-Pacific Partnership

☐ The World Trade Organization - Agreement on Government Procurement

Current thresholds for the applicable Trade Agreements can be found below. Exemptions from trade obligations may apply to certain purchases. Trade Agreements have minimum posting periods. For any questions regarding the impact of the Trade Agreements on your procurement or if an agreement applies, please contact the Ministry's Procurement Specialist, Procurement Services Branch, or Ministry of Attorney General, Legal Services Branch.

The New West Partnership Trade Agreement

- select this option if the opportunity is for goods valued at or above \$10K, services at or above \$75K, or construction at or above \$100K

[Admin settings] [Page settings] [Site map] [Legal mentions]

BC Bid v1.3

- d. **Trade Agreements** that apply to this purchase. The values for the trade agreements are based on the approved amount from the requisition.

The screenshot displays the BCBid Ministry User Guide interface. The top navigation bar includes the BCBid logo, a search bar, and user information (Monday N.). The main navigation menu on the left lists various project management steps. The central content area shows the 'Mandatory Criteria' section for a sourcing project, which includes a list of requirements for quotations and a section for additional mandatory requirements. The 'Mandatory Criteria' section is highlighted with a yellow circle and the letter 'e'.

Mandatory Criteria e

In order for the Quotation to receive consideration it must meet the following:

- The Quotation must be in English.
- The Quotation must be received by the Ministry before the Closing Date and Time.
- Quotation pricing must be in Canadian dollars.
- The Quotation must comply with the Quotation delivery submission method requirements set out in the Delivery of Submissions "overview" tab.
- If the Quotation is submitted by fax or email the Quotation must include a Submission Declaration (located in the RFX document "overview" tab and/or attached to a Response Form) signed by an authorized representative of the Proponent.
- Regardless of the Submission method, the Quotation must include the information and documentation, if any, required by the Specifications Form(s).

Additional Mandatory Requirements

Quotation Pricing Evaluation

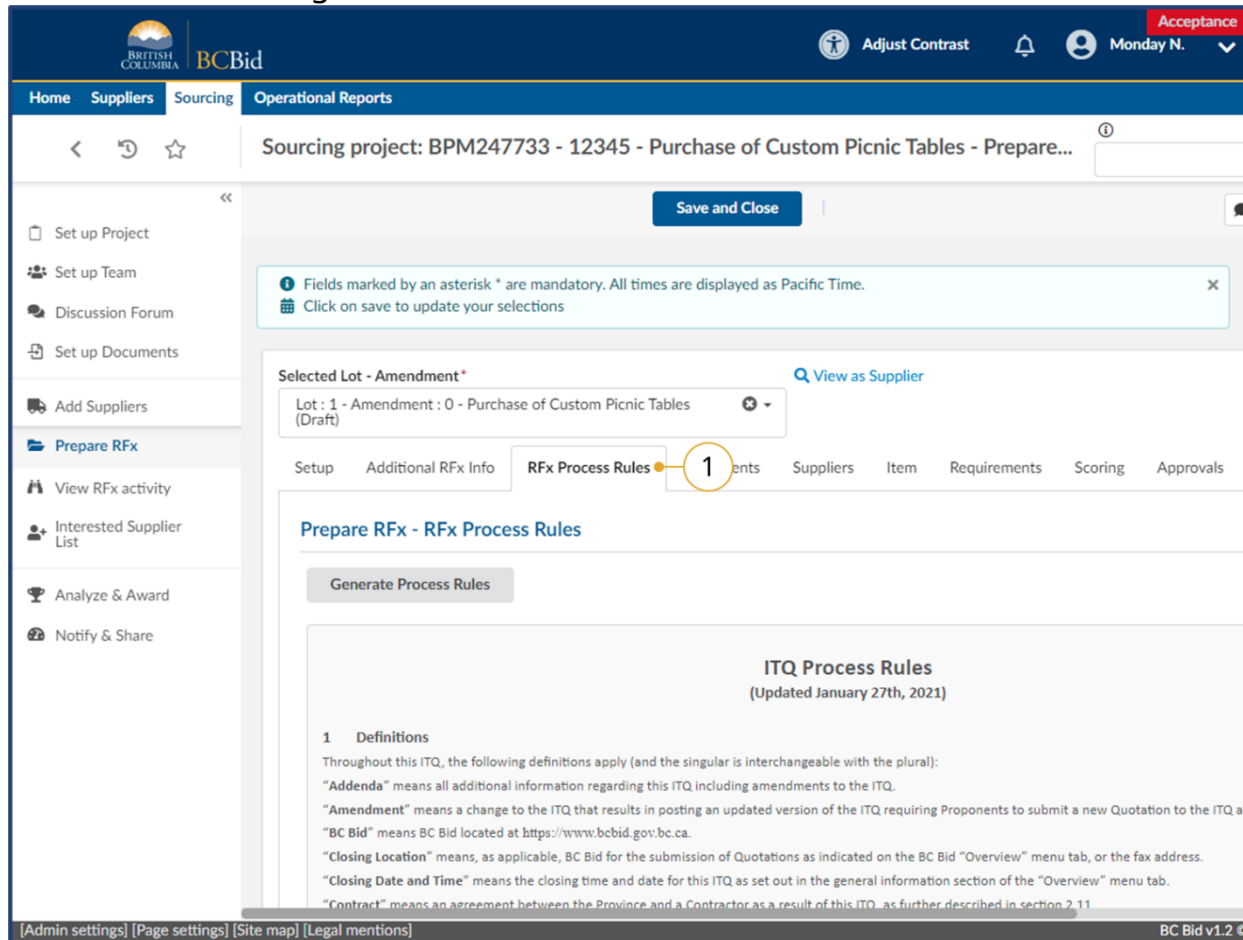
Quotations will be assessed in accordance with the terms and conditions of the ITQ. The Quotation with the lowest price that satisfies the terms and conditions of the ITQ and the Specifications, will be awarded a Contract.

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- e. The **Mandatory Criteria** related to the opportunity. The PSB buyer may add additional mandatory criteria depending on the opportunity. Suppliers must meet all the criteria listed in order for their submission to receive consideration.

RFx Process Rules tab

The ITQ Process Rules are the legal terms related to the ITQ Process. The PSB buyer may edit these rules if needed, in consultation with Legal Services Branch.



The screenshot shows the BCBid web application interface. The top navigation bar includes the BCBid logo, user profile, and date. The main navigation menu on the left lists various project management tasks. The central content area displays the 'Sourcing project: BPM247733 - 12345 - Purchase of Custom Picnic Tables - Prepare...' page. A 'Save and Close' button is visible. A notification box states: 'Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time. Click on save to update your selections'. Below this, the 'Selected Lot - Amendment*' dropdown shows 'Lot : 1 - Amendment : 0 - Purchase of Custom Picnic Tables (Draft)'. A 'View as Supplier' link is present. The 'RFx Process Rules' tab is selected and highlighted with a yellow circle and the number '1'. The 'Prepare RFX - RFx Process Rules' section contains a 'Generate Process Rules' button and a document titled 'ITQ Process Rules (Updated January 27th, 2021)'. The document content includes '1 Definitions' and a list of terms: 'Addenda', 'Amendment', 'BC Bid', 'Closing Location', 'Closing Date and Time', and 'Contract'. The footer contains links for 'Admin settings', 'Page settings', 'Site map', and 'Legal mentions', along with the version 'BC Bid v1.2'.

1. Click **RFx Process Rules** to read the legal terms for the ITQ.

Documents tab

Any documents related to an opportunity will be added on the Prepare RFX Documents tab. These documents may be added from the Sourcing Project documents or added as new documents to the opportunity. Documents must be in approved status before being visible to read-only users.

BCBid

Home Suppliers Sourcing Operational Reports

Sourcing project: BPM247733 - 12345 - Purchase of Custom Picnic Tables - Prepare...

Save and Close

Setup Additional RFX Info RFX Process Rules Documents Item Requirements Scoring Approval

Prepare RFX - Documents

Add documents here to share with suppliers. You can upload a new document, or publish an existing document from the Set up Documents section. In order for a file to be visible to a supplier, the status must be set to Approved.

Search by keyword

Search Reset

Download documents (ZIP) 0

<input type="checkbox"/> Title	Att.	Contact	Last Modification (Pacific Time)	Created on (Pacific Time)	Validity End Date	Status
<input type="checkbox"/> Specifications	Specifications.docx	PINKERTON Lauren	2022-05-20 7:40:44 AM	2022-05-20 7:40:44 AM		RFX Documents (Approved)
<input type="checkbox"/> Sample Photo	photo 1.jpg	PINKERTON Lauren	2022-05-20 7:41:14 AM	2022-05-20 7:41:14 AM		RFX Documents (Approved)

2 Result(s)

[Admin settings] [Page settings] [Site map] [Legal mentions] BC Bid v1.2

1. Click on the **Documents** tab to view the RFX Documents.
2. Click the file to view the attachments.
3. Documents imported from CFS are imported with Draft status. The PSB buyer will change to Approved status to have them visible to suppliers with the opportunity.

Supplier tab (Updated for 2025)

For most opportunities, the Public Portal will be selected. This posts the opportunity publicly on BC Bid. Suppliers will be listed here if they have clicked the **Start Submission** button or once the opportunity has closed and the Responsible person has entered the responses received from outside of BC Bid.

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.
Expected date format: yyyy-MM-dd

Selected Lot - Amendment*
Lot: 1 - Amendment: 0 - ITQ (Draft) View as supplier

Setup Additional RFX Info RFX Process Rules Documents **Suppliers** Requirements Scoring Approvals Approval Workflow

Search by keyword
Search Reset

Invited Suppliers

Prepare RFX - Suppliers

Invited Suppliers	Notified Supplier's Contact
3M Company	0
Public Portal	0
PacifiHumpback DBA	0

- Click on the Suppliers tab.
- View the Suppliers who have been interacting with the opportunity.
 - When an opportunity is issued, the Public Portal is invited.
 - If an opportunity is a Direct Award, the invited supplier will be listed.
 - Once the opportunity is open, suppliers who are registered and click the **Start Submission** button will be listed.
 - Notified Supplier's Contact** indicates if the supplier has been notified or not. a 1 indicates they have been notified and this will reset for each amendment. You can toggle between multiple amendments with the **Selected Lot - Amendment dropdown**.
 - Refine suppliers using search parameters (keyword or invited).

Item tab

The items being purchased are listed on the Items tab; item description, quantity, and unit are included. Items can be identified as required or optional by the PSB buyer. Some changes to the items will require a requisition amendment by the Ministry buyer.

1. Click on the **Items** tab.

2. View the **Response** grid, all information is imported from the CFS requisition.

- Type – required or optional item
- Description – description of the item
- Qty – how much of the item
- Delivery date – the required by date from the requisition
- Reference Price – the per unit pricing from the requisition

3. Click **Preview** to see the supplier view of the Pricing form.

Note: The unit price field can support up to 6 decimal places.

Requirements tab (New for 2025)

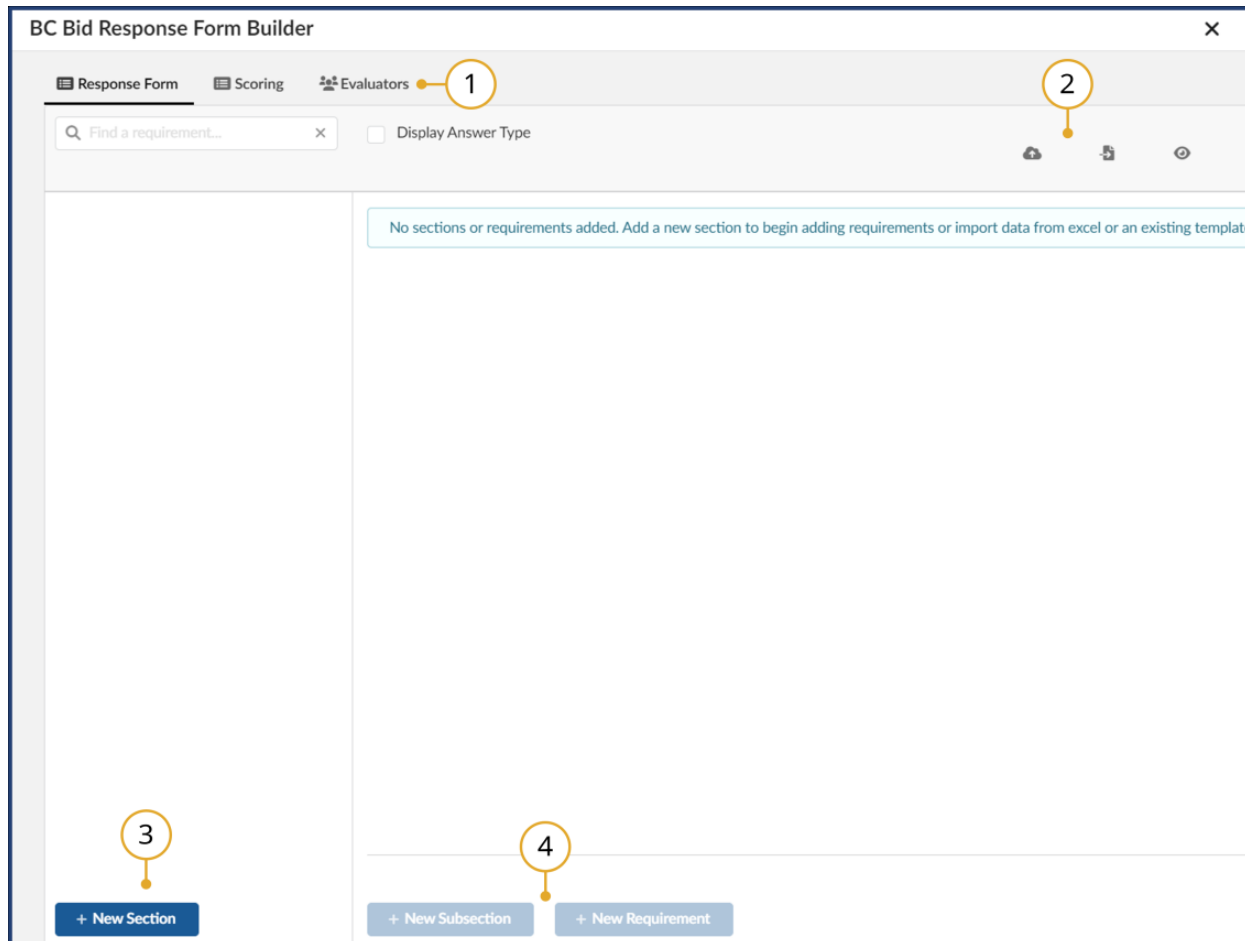
The requirements tab form allows the PSB buyer to collect information from the suppliers when responses are submitted. This can include items such as: confirming make and model or warranty information.

The screenshot displays the BC Bid Sourcing project interface for project BPM542832 - ITQ - Prepare RFx. The left sidebar contains navigation options: Set up Project, Set up Team, Discussion Forum, Set up Documents, Add Suppliers, Prepare RFx (highlighted), View RFx activity, Interested Supplier List, Analyze & Award, and Notify & Share. The main content area shows the 'Prepare RFx - Requirements' tab. At the top, there are buttons for 'Save and Close', 'Validate & Save', and 'Ready to Issue'. Below these, a message states: 'Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time. Expected date format: yyyy-MM-dd'. The 'Selected Lot - Amendment*' dropdown shows 'Lot : 1 - Amendment : 0 - ITQ (Draft)' with a 'View as supplier' link. The 'Requirements' tab is selected, indicated by a circled '1'. The 'Response Form Summary' table shows: Total Response Form Sections: 1, Total Response Form Requirements: 1, Total Scoring Sections: 1, Total Scoring Requirements: 0, and Missing Evaluator(s) with a warning icon. The 'Actions' section includes a button 'Edit Requirements & Scoring' (circled 'a'), a 'Preview As Supplier' button, and a 'Generate Response Form' button.

Response Form Summary	
Total Response Form Sections	1
Total Response Form Requirements	1
Total Scoring Sections	1
Total Scoring Requirements	0
Missing Evaluator(s)	▲

1. Select the Requirements tab to develop the response form that suppliers will complete with their submission.
 - a. Start by clicking **Edit Requirements & Scoring** to open the BC Bid Response Form Builder. This will open in the same window but will be overlaid on the sourcing project view.

Note: Once in the Response Form Builder, do not close out of the internet browser completely as this will exit BC Bid. To leave the BC Bid Response Form Builder click the X in the top right-hand corner within the response builder to be taken back to the main BC Bid application.



BC Bid Response Form Builder

1. In the top left, users can navigate between the response form tab, the scoring tab, and the evaluators tab.
2. In the top right, 4 icons are present:
 - **Cloud:** Import/Export Excel
 - **Document:** Import existing template
 - **Eyeball:** Preview
 - **Eraser:** Clear all
3. In the bottom left corner, click the + **New Section** button to create a new section.
4. Once a new section is created, click the + **New Subsection** button or + **New Requirement** button to create subsections or requirements as needed.

The requirement form can be developed multiple ways:

- [Create from a Template](#)
- [Create Manually](#)
- [Import from Excel](#)

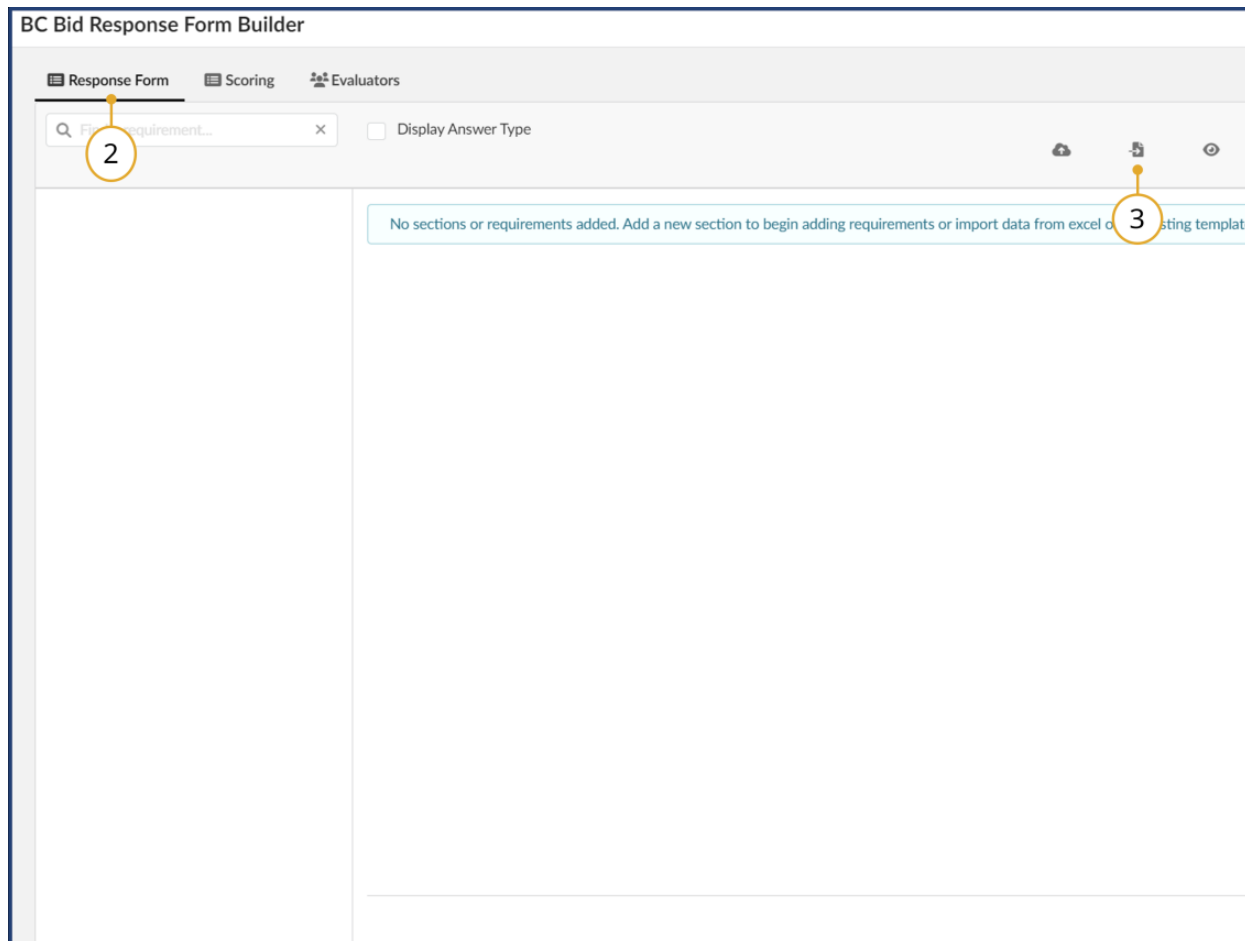
Create from a template (New for 2025)

The screenshot displays the BC Bid system interface for creating a template. The top navigation bar includes 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The 'Sourcing' tab is active, showing the project 'BPM542897 - ITT - Prepare RFX'. The left sidebar lists various actions: 'Set up Project', 'Set up Team', 'Discussion Forum', 'Set up Documents', 'Add Suppliers', 'Prepare RFX' (highlighted), 'View RFX activity', 'Planholders', 'Unverified Bid Results', 'Analyze & Award', and 'Notify & Share'. The main content area shows the 'Prepare RFX - Requirements' section. A 'Response Form Summary' table lists 'Total Response Form Sections', 'Total Response Form Requirements', 'Total Scoring Sections', and 'Total Scoring Requirements', all with a count of 0. The 'Actions' column contains three buttons: 'Edit Requirements & Scoring' (highlighted with a yellow circle and the number 1), 'Preview As Supplier', and 'Generate Response Form'. A 'Selected Lot - Amendment*' dropdown shows 'Lot : 1 - Amendment : 0 - ITT (Draft)' with a 'View as supplier' link. A 'Save and Close' button and a 'Validate & Save' button are at the top right. A note at the top states: 'Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time. Expected date format: yyyy-MM-dd'.

Response Form Summary	
Total Response Form Sections	0
Total Response Form Requirements	0
Total Scoring Sections	0
Total Scoring Requirements	0

Actions	
Edit Requirements & Scoring	1
Preview As Supplier	
Generate Response Form	

1. Click **Edit Requirements & Scoring**.



2. Ensure that the **Response Form** tab is selected in the top left corner.
3. Click the second icon in the top right corner (document/arrow) to import existing template. This will open the **Configure Response Forms** window.

BC Bid Response Form Builder

Response Form Scoring Evaluators

Find a requirement... x Display Answer Type

No sections or requirements added. Add a new section to begin adding requirements or import data from excel or an existing template.

Configure Response Forms

Close

Search by keyword: ITQ Type: Proposals Evaluation Organization: Commodity: Search Search Reset

Status: Owner: ☒ Is a template

Filters Search by keyword: ITQ x Type: Proposals Evaluation Is a template: ☒ x

Response Form/Element	Type	Organization	Commodity	Status	Owner	Automated Assessment	Next Launch
<input type="checkbox"/> ITQ - Meet Requirements	Proposals Evaluation	Procurement Services Branch		Open	Lauren PINKERTON		
<input type="checkbox"/> ITQ - Supplier Identification	Proposals Evaluation	Procurement Services Branch		Open	Jason TAYLOR		

2 Record(s)

4. the search fields to search for the required template.
 - a. Click **Search**.
5. Use the checkbox to select the required response form template.

To search for all Response Forms (not just templates), uncheck the **Is a template** checkbox.

The screenshot displays the 'BC Bid Response Form Builder' interface. At the top, there are tabs for 'Response Form', 'Scoring', and 'Evaluators'. Below the tabs is a search bar labeled 'Find a requirement...' and a checkbox for 'Display Answer Type'. The main area is divided into two columns. The left column contains a section titled 'Specifications' with a callout '6' pointing to its header. The right column contains a subsection titled 'Does this meet specs?' with a callout '7' pointing to its header. Below this subsection is a large text area with a callout '8' pointing to it. On the far right of the right column, there is a button labeled 'Not Scored' with a callout 'a' pointing to it.

6. that you have selected a template, you can see that a section titled “Specifications” has populated in the left column.
7. Within the section “Specifications” there is a subsection titled “Does this meet specs?”.
 - a. *Optional:* You can click on the **Not Scored** button on the right-hand side to make this a scored questions if applicable.
8. Click the **pencil icon** here if you wish to edit the subsection.

← Previous | Save | Save & Close | Cancel | Save & New →

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.

Response Form row

a Answer Type*
Single Selector from Custom List

b Code

c Field Label*
Does this meet specs?

Response Guidelines
Response Guidelines

d Add an Attachment to Question
Click or Drag to add a file

10a Numeric text field **10** Question scored

11 **12**

List of Possible Question Values

Duplicate from template or question | Dropdown list | + New Line

Possible Values*	Scoring	Att. ⓘ	Com. ⓘ
Yes	0	<input type="checkbox"/>	<input type="checkbox"/>
No	0	<input type="checkbox"/>	<input type="checkbox"/>

9. Once you have clicked the edit icon (pen) for the subsection, you are brought to an editing menu.
 - a. The answer type can be selected from the **Answer Type** dropdown.
 - b. The **Field Label** can be adjusted as needed; generally just a title (multi-page questions should be added to response guidelines).
 - c. Provide additional information related to the questions in the **Response Guidelines** section.
 - d. *Optional: Add an attachment to question* as needed.
10. *Optional: Check the Question scored checkbox if this question is meant to be scored.*
 - a. The numeric text field box should be checked if there are any numeric text field boxes to enter data into (ex. phone number).
11. Hit **Save & Close** to return to the BC Bid Response Form Builder.
12. *Optional: Hit **Save & New** if you wish to save this subsection and then create a new subsection immediately afterwards.*

Note: If importing from templates you don't need to adjust these fields as they will already be pre-populated.

The screenshot displays the 'response Form' interface with tabs for 'Scoring' and 'Evaluators'. The 'List of Possible Question Values' section is active, showing a table of possible values for a question. Callout 13 points to the title of this section. Callout 'a' points to the 'Duplicate from template or question' dropdown. Callout 'b' points to the 'Dropdown list' dropdown. Callout 'c' points to the table of possible values. The table has columns for 'Possible Values', 'Scoring', 'Att.', and 'Com.'. It contains two rows: 'yes' and 'no', both with a score of 0. Below the table, it says '2 Record(s)'. The 'Advanced Properties' section is also visible, with callout 14 pointing to the 'Required' checkbox, which is checked. Callout 15 points to the 'Save & Close' button at the top of the form.

Possible Values *	Scoring	Att. ⓘ	Com. ⓘ
yes	0	<input type="checkbox"/>	<input type="checkbox"/>
no	0	<input type="checkbox"/>	<input type="checkbox"/>

2 Record(s)

Advanced Properties

Auto-fill from supplier profile ⓘ

☐ Multiple answers allowed

☒ Required 14

☐ Add Comment Field to Clarify the Answer

☐ Allow vendor to add an attachment to their response

Buttons at the top: Previous, Save, Save & Close 15, Cancel, Save & New →

13. *Optional:* Review the List of Possible Question Values.

- Indicates that this comes from a template.
- You can select the question type from this dropdown list.
- This table shows the possible values or responses to the indicated question.

14. If the question is required, check or uncheck the **Required** checkbox under Advanced Properties as needed.

15. Always click **Save & Close** after making any adjustments to ensure that they are saved.

Create Manually (New for 2025)

BCBid

Home Suppliers Sourcing Operational Reports

Sourcing project: BPM542897 - ITT - Prepare RFX

Save and Close Validate & Save

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.
Expected date format: yyyy-MM-dd

Selected Lot - Amendment*
Lot : 1 - Amendment : 0 - ITT (Draft) View as supplier

Setup Additional RFX Info Documents Suppliers Requirements Scoring Item

Prepare RFX - Requirements

Response Form Summary	Actions
Total Response Form Sections 0	Edit Requirements & Scoring 1 Preview As Supplier Generate Response Form
Total Response Form Requirements 0	
Total Scoring Sections 0	
Total Scoring Requirements 0	

1. Click **Edit Requirements & Scoring**.

BC Bid Response Form Builder

Response Form Scoring Evaluators

Find a requirement... x

Display Answer Type

No sections or requirements added. Add a new section to begin adding requirements or import data from excel or an existing template

+ New Section

+ New Subsection

+ New Requirement

2. Once you are in the BC Bid Response Form Builder, navigate to the bottom left-hand corner of the builder and click on the **+ New Section** button. It is mandatory to have at least one section.

Note: Sections organize the response form into generalized categories/headings for a set of questions. It is mandatory that a response form have at least one section.

← Previous | Save | Save & Close | Cancel | Save & New →

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.

Response Form row

☐ Numeric text field ☐ Question scored

Code

Section*

Label

Response Guidelines

Response Guidelines

List of Possible Question Values

3. The numeric text field box should be checked if there are any numeric text field boxes to enter data into (ex. phone number).
 - a. *Optional:* If you wish for this question to be scored, click the **Question Scored** checkbox. If not, leave it blank.
4. Fill in the **Section** information (as this is a mandatory field).
5. *Optional:* Hit **Save & New** if you wish to create another section after this one is saved.
6. Click **Save & Close** to ensure that the information you are entering is not lost before leaving this window.

Note: Provide additional information about the section in the **Response Guidelines** box.

BC Bid Response Form Builder

Response Form Scoring Evaluators

Find a requirement... x

Display Answer Type

= : Test Question 0

No sub-sections or requirements added in this section.

+ New Section + New Subsection + New Requirement 7

7. With the newly created Section selected on the left-hand side, click the **+ New Requirements** button in the bottom middle of the response form builder screen. This will take you to a submenu where you can configure the new requirement.

Note: Subsections are optional and are a way to further organize your response form. When building a response form, a section might be titled “information”, and a subsection would be “location” or “type of business” and then a requirement is the actual question, such as “what is your address?”

Answer Type (Updated for 2025)

Answer Type

← Previous Save Save & Close Cancel Save & New →

Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.

Response Form row

8 Answer Type*

Text
Long text
Numeric
Date
Attachment (Single File)
Attachments (Multiple Files)
Single Selector from Custom List
Single Selector from Standard List

Add an Attachment to Question
Click or Drag to add a file

List of Possible Question Values

Advanced Properties

Auto-fill from supplier profile ⓘ

Required

Add Comment Field to Clarify the Answer

Subsection + New Requirement [Site map] BC Bid v2.0

8. In the **Answer Type** drop-down list, select the appropriate item.

Note: All questions must be under a Section.

- Text** – the supplier may answer with a single paragraph
- Long Text** – the supplier may answer with multiple paragraphs
- Numeric** – the supplier may answer with a date.
- Date** – the supplier may answer with a number
- Attachment (Single File)** – the supplier may answer with a single file (Please see note to left)
- Attachment (Multiple Files)** – the supplier may answer with multiple files (please see note to left)
- Single Selector from Custom List** – You can create your own question type with custom answers.
- Single Selector from Standard List** – Pick a predefined list of response values that exist in the BC Bid application

The screenshot shows the 'Response Form row' interface in the BC Bid system. It includes a top navigation bar with buttons: Previous, Save, Save & Close (14), Cancel, and Save & New (13). A message bar states: 'Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time.' The form fields include: Answer Type* (Text), Code, Field Label* (9), Response Guidelines, Add an Attachment to Question (10), List of Possible Question Values, and Advanced Properties. In the Advanced Properties section, there is a checkbox for 'Required' (11) and a dropdown for 'Auto-fill from supplier profile'. A 'Question scored' checkbox (12) is also present. At the bottom left, there is a 'subsection' button and a '+ New Requirement' button. The footer shows '[Site map]' and 'BC Bid v2.0 ©'.

9. In **Field Label**, enter appropriate content. This is generally just a title (multi-page questions should be added to response guidelines).
 - a. *Optional:* Provide additional information related to the questions in the **Response Guidelines** section.
10. *Optional:* Attach any relevant documents to the question if needed using **Add an Attachment to Question**.
11. *Optional:* To make a question mandatory, select the **Required** checkbox.
12. Deselect the **Question scored** checkbox. Scoring functionality is not used.
13. *Optional:* Click **Save & New** if you wish to add another new requirement after finishing with this one.
14. Click **Save & Close** to ensure that you have saved all relevant info fields and information for this requirement before closing.

The screenshot displays the 'Scoring Parameter' section of the BC Bid system. At the top, there are navigation buttons: 'Previous', 'Save', 'Save & Close', 'Cancel', and 'Save & New'. Callout 17 points to the 'Save' button, callout 16 points to the 'Save & New' button, and callout 15 points to the 'List of Possible Scoring Values' section.

Below the navigation buttons, there are checkboxes for 'Allow vendor to add an attachment to their response' and 'File can be attached to the score'. The 'Scoring*' section includes a dropdown for 'Evaluator to Select Value', a 'Minimum Score' field, and a 'Question Weight*' field set to 1. There are also checkboxes for 'A comment can be added to clarify the score' (checked) and 'Give the ability to answer "not applicable" for this question'.

The 'List of Possible Scoring Values' section is highlighted by callout 15. It contains a 'Duplicate from template or question' button, a 'Dropdown list' (callout 'a'), and a '+ New Line' button (callout 'c'). Below this is a table with the following structure:

Possible Values*	Scoring*	Att. ⓘ	Com. ⓘ
Yes	0	<input type="checkbox"/>	<input type="checkbox"/>
No	0	<input type="checkbox"/>	<input type="checkbox"/>
0 Record(s)			

Callout 'b' points to the 'Yes' row in the table. At the bottom left, there is a '+ New Requirement' button. The footer shows '[Site map]' and 'BC Bid v2.0 ©'.

15. Adjust the list of possible scoring values for the question as needed.
 - a. From the **Dropdown list**, select the way the values will be displayed.
 - b. In **Possible Values**, add each potential response to the question.
 - c. Select **+ New Line** as needed.
16. Optional: Click **Save & New** if you wish to close this requirement and make another new one.
17. Click **Save & Close** to ensure that all the information entered in the text fields is saved.

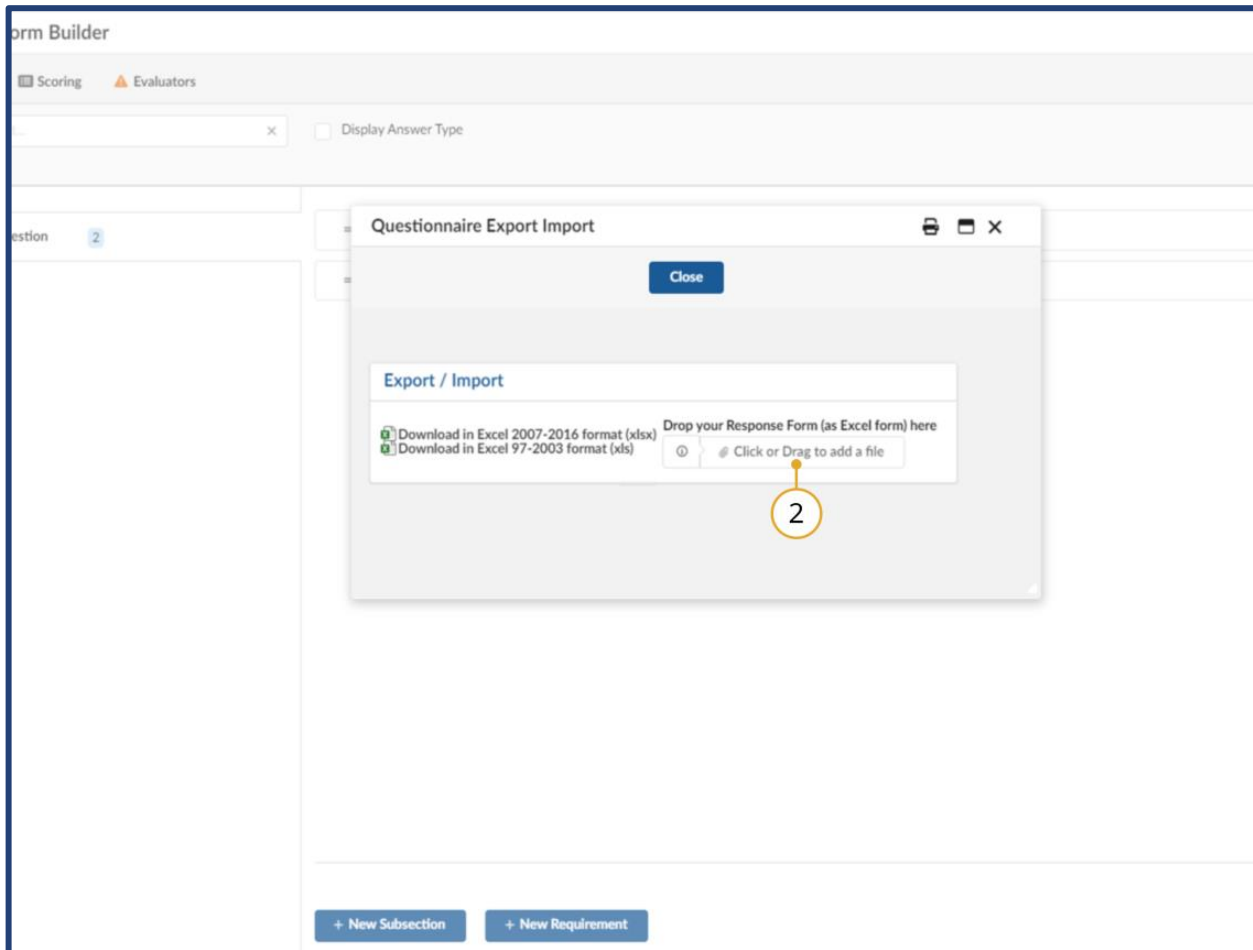
Note: repeat as needed for all questions that have a question type of **List of values**.

Import from Excel (New for 2025)

1. Click **Edit Requirements & Scoring**.

The screenshot shows the BCBid Sourcing project interface for project BPM542897 - ITT - Prepare RFX. The left sidebar contains navigation links: Home, Suppliers, Sourcing, and Operational Reports. The main content area is titled 'Sourcing project: BPM542897 - ITT - Prepare RFX' and includes buttons for 'Save and Close' and 'Validate & Save'. A notification bar states: 'Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time. Expected date format: yyyy-MM-dd'. Below this, the 'Selected Lot - Amendment*' dropdown shows 'Lot : 1 - Amendment : 0 - ITT (Draft)' with a 'View as supplier' link. The 'Requirements' tab is active, displaying the 'Prepare RFX - Requirements' section. This section includes a 'Response Form Summary' table and an 'Actions' column. The table shows zero counts for 'Total Response Form Sections', 'Total Response Form Requirements', 'Total Scoring Sections', and 'Total Scoring Requirements'. The 'Actions' column contains three buttons: 'Edit Requirements & Scoring' (highlighted with a yellow circle and the number 1), 'Preview As Supplier', and 'Generate Response Form'.

Response Form Summary		Actions
Total Response Form Sections	0	Edit Requirements & Scoring 1 Preview As Supplier Generate Response Form
Total Response Form Requirements	0	
Total Scoring Sections	0	
Total Scoring Requirements	0	



2. The Questionnaire Export Import window will open. Drag and drop a document on to the **Click or Drag to add a file** button or click the **Click or Drag to add a file** to browse for the document.

Response Form Import

4 Import items Save & Close Close

Errors / Warnings / Information details

Sheet	#	Question	Column	Level	Error	Excel value	Effect	Corrected value
Questions	V3	Specifications	A comment can be added to clarify the score	Warning	Not imported value	True	Replace by default value	False
1 Record(s)								

Summary of changes that will occur

Question Section added
Empty section Empty section
Specifications Section added

- 1 question(s) added

1

- 1 question(s) added

Specifications

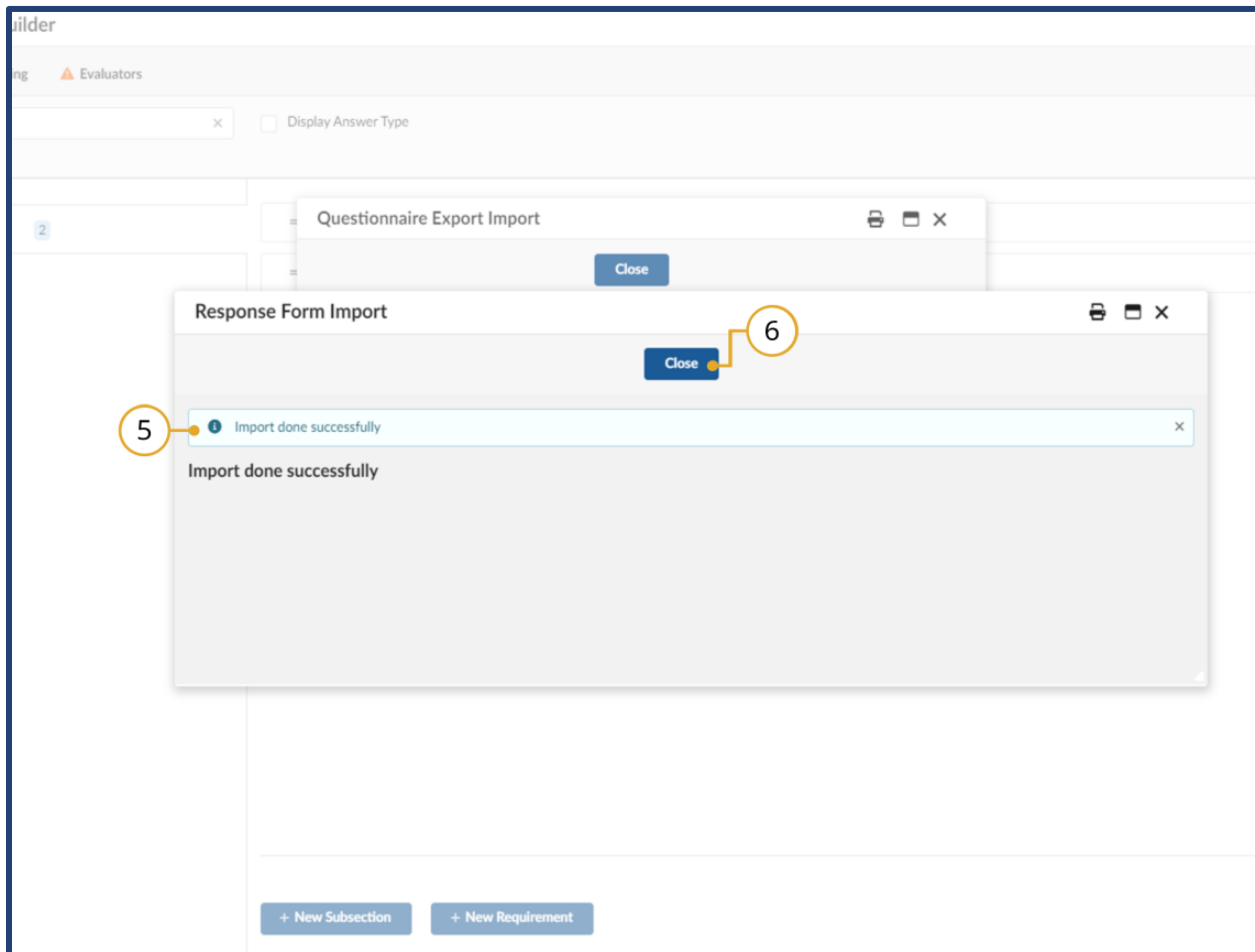
- 2 question(s) added

Test Question Section deleted

- 2 question(s) deleted

+ New Subsection + New Requirement

3. Review the **Summary of changes that will occur**.
 - a. If present, review any Errors/Warnings listed.
4. Click **Import items**.



5. Receive an **Import done successfully** notification.
6. Click the **Close** in the middle top of the Response Form Input window to close the dialog box.

The screenshot displays the BC Bid Response Form Builder interface. At the top, there is a header bar with a close button (X) in the top right corner, which is highlighted by a yellow circle and the number 8. Below the header, there is a section titled 'Answer Type' with a list of requirements. The first requirement is 'Date', which is highlighted by a yellow circle and the number 7. To the right of this requirement is a '✓ Scored' button. Below this, there is another requirement, 'State make/model of product being offered.', also with a '✓ Scored' button. At the bottom of the interface, there is a 'Subsection' label and a '+ New Requirement' button.

7. Review imported items.
8. Click the **X** in the top right-hand corner to exit the BC Bid Response Form Builder.

Addenda

Addenda represent small changes to an opportunity (clarifying information and answers to supplier questions) and are issued by the PSB buyer in the Discussion Forum.

The screenshot displays the BC Bid system interface for a sourcing project. The top navigation bar includes the BC Bid logo, a search bar, and user information. The left sidebar contains navigation options such as 'Set up Project', 'Set up Team', 'Discussion Forum', 'Set up Documents', 'Add Suppliers', 'Prepare RFX', 'View RFX activity', 'Interested Supplier List', 'Analyze & Award', and 'Notify & Share'. The main content area is titled 'Discussion Forum' and shows a search bar, a table of addenda, and a detailed view of a selected addenda message. The table lists addenda with columns for 'Subject', 'Messages', 'Last update (Pacific Time)', 'Original sender', and 'Last sender'. The detailed view on the right shows the message content, including a question and answer about picnic tables.

1. Click on the **Discussion Forum** tab.

2. Click the message.

3. View the content of the message on the right side of the screen.

Amendments

Amendments represent substantial changes to an opportunity (changes in quantity or specifications). For suppliers, an amendment will require them to resubmit a response to the opportunity.

The screenshot displays the BC Bid system interface for a sourcing project titled "BPM247849 - test - Prepare RFX". The interface includes a top navigation bar with "Home", "Sourcing", and "Operational Reports" tabs. A left sidebar contains various project management options, with "Prepare RFX" highlighted and circled with a red 1. The main content area shows the "Prepare RFX - Setup" tab, which includes fields for "Opportunity ID", "RFX Status", "Opportunity Type", "Opportunity Description", "Lot #", "Amendment #", and "Amendment reason". The "Amendment reason" field is circled with a red 3. Below these fields is an "Amendment History" table, which is circled with a red 4. The table has columns for "#", "Amendment reason", and "Date & time (Pacific Time)". The first row shows "1", "change item quantity from 50 to 75", and "2022-06-03 1:55:27 PM". The "Selected Lot - Amendment" dropdown menu is circled with a red 2.

#	Amendment reason	Date & time (Pacific Time)
1	change item quantity from 50 to 75	2022-06-03 1:55:27 PM

1. Click on the **Prepare RFX, Setup** tab.
2. To navigate between amendment versions, click the **Amendment** dropdown.
3. Look at the current **Amendment #** and **Amendment Reason**.
4. If there are previous amendments, they are listed in the **Amendment History**.

Amendments can be initiated by an amended requisition or in BC Bid by the PSB buyer.

Direct Awards

If an opportunity is identified as a Direct Award, the PSB buyer will issue the opportunity to the one supplier indicated for the Direct Award. The Direct Award supplier will need to respond to the Direct Award opportunity within the issue/close date of the ITQ. Direct Awards are not posted publicly and are only visible to the one supplier indicated.

The screenshot displays the BC Bid system interface for a sourcing project titled "BPM249146 - Bricks for Superior Street Project - Prepare RFX". The interface includes a top navigation bar with "Home", "Suppliers", "Sourcing", and "Operational Reports" tabs. A left sidebar contains various project management options. The main content area is divided into several tabs, with "Setup" selected. The "Setup" tab contains fields for "Issue Date and Closing Date (times are shown in Pacific Time)", "Enquiries Deadline", "Visible to Public", and "Sealed Submissions".

Numbered callouts indicate the following steps:

1. Click on the Add Supplier tab.
2. On the Prepare RFX Setup tab, the visible to public checkbox will be unchecked.
3. View the Issue and Closing date. The invited supplier needs to respond before the Closing Date & Time.

Callout 'a' points to the "Public Portal" checkbox in the "Visible to Public" section, which is checked.

1. Click on the Add Supplier tab.
 - a. The Direct Award supplier will be listed. Public Portal will also be selected, but this does not control the visibility of the opportunity.
2. On the Prepare RFX Setup tab, the visible to public checkbox will be unchecked.

This allows only the invited supplier to view the opportunity.
3. View the Issue and Closing date. The invited supplier needs to respond before the Closing Date & Time.

View RFx Activity

The View RFx Activity tab displays the suppliers that have been involved in the opportunity based on lot/amendment. Users can see if the supplier has received emails and if they have logged into BC Bid. Supplier submissions can only be viewed after the opportunity has closed and the PSB buyer has unsealed the submissions (opportunity status will be "Processing").

1. Click on the **View RFx Activity** tab.

2. Confirm the **status** of the opportunity and if **submissions are unsealed**.

3. Once the opportunity has been closed and submissions are unsealed, view the list of suppliers who interacted with the opportunity. Suppliers listed have interacted with the opportunity, but may not have submitted a response.

View Supplier Submissions

Once an opportunity closes, it will be in closed status. While it is in closed status the PSB buyer or PSB admin will need to enter any submissions received outside BC Bid. Those submissions will be visible in BC Bid once the person with the Responsible role unseals the responses. Once the responses are unsealed, the opportunity will be in Processing status and the individual submissions can be viewed.

1. Click **View RFX Activity**.

2. Confirm that the opportunity has been unsealed.

Supplier	DBA	Email	Logins	Last login (Pacific Time)	Non-Disclosure Agreement	Read docs	Submissions
Alligator, Alfred	Sample Company A		1	2022-05-25 9:53:16 AM		1	
Bear, Barry	Sample B		1	2022-05-25 9:59:57 AM			
Cat, Cassie	SampleC		1	2022-05-25 10:05:04 AM			
Dog, Douglas	SampleD		1	2022-05-25 10:09:29 AM			
Moose, Marty	Moose's Doggy Day Care						
5 Result(s)							

Submissions are now available for evaluation, unsealed on 2022-05-25 10:48:26 AM (Pacific Time) by PINKERTON Lauren

View Selected Supplier

Once the PSB buyer has identified the lowest priced submission, the results can be viewed from the Notify & Share tab.

BCBid

Home Sourcing Operational Reports

Sourcing project: BPM247733 - 12345 - Purchase of Custom Picnic Tables - Notify ...

Notify & Share

Notify Suppliers and Create a Contract Award Summary

Search Submissions

Supplier: [Dropdown] Amendment: Lot : 1 - Purchase of Custom Picnic Tables - Amendment : 0 [X] [Q Search]

Decision: Unsuccessful [X] Selected [X] [Q Search]

Notifications Sent (Selected and Not Selected)

Supplier	DBA	Lot / Amendment	Submission	Decision	Award amount	Notification
Bear, Barry	Sample B	Lot : 1 / Amendment : 0	Submission # 1	Unsuccessful		Send Notification
Cat, Cassie	SampleC	Lot : 1 / Amendment : 0	Submission # 1	Unsuccessful		Send Notification
Dog, Douglas	SampleD	Lot : 1 / Amendment : 0	Submission # 1	Selected	45,600.00 CAD	Successful: Notified

3 Result(s)

Items synthesis

[Site map] [Legal mentions] BC Bid v1.3

1. Click on the **Notify & Share** tab.
2. View the **Decision** column to identify the lowest compliant submission.
3. To review the submission details, click the title of the submission.

Supplier Submission

Submission Info

Response Form

Pricing

Save Save & Close

Submission Information

Opportunity ID
484107

Opportunity Description
Purchase of Custom Picnic Tables

Legal Name
Dog, Douglas

Doing Business as Name
SampleD

Submission Type
Original

Submission Status
Received

Offline Submission Receipt
12:00:00 AM

Offline Submission Entered
12:00:00 AM

Label
Submission # 1

Items synthesis

[Site map] [Legal mentions] BC Bid v1.3 ©

- In the Supplier Submission dialog box, review the information contained in the **Submission Info**, **Response Form**, and **Pricing** tabs.

Award Info

Once the Purchase Order has been issued to the supplier, the PSB buyer will complete the Contract Award Summary on the Notify & Share tab. This will make public the results of the opportunity.

The screenshot displays the BCBid web application interface. The top navigation bar includes the BCBid logo, user profile, and date. The sidebar on the left contains various project management options. The main content area is titled 'Notify & Share' and includes a search bar and a table of notifications. A red circle with the number '1' highlights the 'Notify & Share' tab in the sidebar. A red circle with the number '2' highlights the 'Contract Award Summary' column in the table.

Supplier	DBA	Lot / Amendment	Submission	Decision	Award amount	Notification	Contract Award Summary
Bear, Barry	Sample B	Lot : 1 / Amendment : 0	Submission # 1	Unsuccessful		Send Notification	
Cat, Cassie	SampleC	Lot : 1 / Amendment : 0	Submission # 1	Unsuccessful		Send Notification	
Dog, Douglas	SampleD	Lot : 1 / Amendment : 0	Submission # 1	Selected	45,600.00 CAD	Successful: Notified	[CTR050103] PO-987654321

3 Result(s)

Items synthesis

Requests	Amendment #	Items	Supplier	Ref. amount	Target amount	Price	Total target savings	Grand total:	Identified savings / Target
Purchase of Custom Picnic Tables	0	Custom Picnic Tables - Style 1	SampleD	50,000.00		22,800.00		27,200.00	
Purchase									

1. Click on the **Notify & Share** tab.
2. Click on the PO number in the **Contract Award Summary** column.

Contract:

Contract header 3

Type: Simple Agreement

Contract: 50103

Status: Awarded

Sourcing Project: 12345 - Purchase of Custom Picnic Tables

Rfx reference: Purchase of Custom Picnic Tables

Contract Number*: PO-987654321

Supplier: Dog, Douglas

Supplier Address*

Justification for Direct Award/Limited Tendering

Award Date*: 2022-05-25

Issuing Location*: Victoria

Contract Value*: 45,600.00

Contract contact email*: procurement@gov.bc.ca

Issued by: Ministry of Citizens' Services, Ministry of Environment and Climate Change Strategy

Commodities: 56101603 - Outdoor tables or picnic tables

Supplier	Sample	Lot	Amendment	Submission	Status	Amount
Dog, Douglas	SampleD	Lot : 1 / Amendment : 0		Submission # 1	Selected	45,600.00 CAD

3 Result(s)

[Admin settings] [Page settings] [Site map] [Legal mentions] BC Bid v1.3

3. In the dialog box, view the award information.

View Purchase Order Information from CFS

Home Suppliers Sourcing Operational Reports

Sourcing project: BPM249144 - Bricks for Superior Street Project - Analyze & Award

Selected Amendment *
Lot : 1 - Amendment : 0 - Bricks for Superior Street Project (Processing)

Scenarios ⓘ
Scenario #1 (validated simulation)

Currency
CAD Canadian dollar

Search by keyword Submissions
Received x Shortlisted Submissions only Advanced search Search

Analyze & Award 1. Generate POs and send them to CFS after Award:
1. Ensure the Supplier # is present for the awarded Suppliers. If not displayed, it will need to be updated on the Supplier record by the helpdesk team.
2. Enter the Site # for awarded Suppliers and click on Save.
3. Click on the Generate PO(s) button.
NOTE: The Generate PO(s) button only displays if a proposal has been awarded and both a Supplier # and Site # are saved for all awarded proposals.

Generate PO(s)

RFx	Results Date/Time (Pacific Time)	BPM	CFS PO	Results
Bricks for Superior Street Project	2022-09-07 1:38:24 PM	Bricks for Superior Street Project	PO-BPM249144-1	SUCCEEDED

1 Result(s)

[Admin settings] [Page settings] [Site map] [Legal mentions] BC Bid v1.3

1. Click on the Analyze & Award tab.
2. View the CFS PO number.
3. View the CFS integration result.

Appendix 1: Provincial Help Desk

Help desk hours: 8:30 am to 4:30 pm Monday to Friday

Email Contact: bcbid@gov.bc.ca

Contact the help desk by phone:

Direct: 1-250-387-7301

Toll Free (BC only): 1-800-663-7867

Appendix 2: Training Video Links

Video Name	URL (Link)
Login and How the Buyer Dashboard works	https://youtu.be/qEFdCimZNvw
Exploring Opportunities	https://youtu.be/cPG8eZrDiiI
Set up Team	https://youtu.be/PCAxNIQJPow
How to use the Discussion Forum	https://youtu.be/j-MZaF9z4tY

Appendix 3: Invitation To Quote Requisition & Purchase Order Process Overview

This outlines the steps from the Ministry Buyer creating a requisition within the Corporate Financial System (CFS) using iProcurement (iPro) through the PSB Buyer creating and issuing the Invitation to Quote (ITQ) opportunity within BC Bid to the Ministry buyer issuing a Purchase Order to the successful supplier.

Requisition

1. CFS/iPro requisition is created.
 - a. iPro is used to submit an approved requisition
 - b. Ministry buyers use the new UNSPSC commodity codes when creating the iPro requisition
 - c. Ministry buyers can use the [iPro Sourcing via BC Bid guide](#) for assistance in creating the requisition
 - d. Ministry buyers may need to amend a requisition at the PSB buyer's request. This could be to: change the unit of measure or to move items to additional lines. A notification email will be sent to itq.procurement@gov.bc.ca to notify PSB about the amendment. PSB may initiate the request to Ministry buyers via the BC Bid Discussion forum
2. EA approves requisition.
 - a. This initiates the import to BC Bid.
3. CFS-BC Bid integration creates the Sourcing Project and draft ITQ in BC Bid.
 - a. Email notification is sent to PSB Admin at itq.procurement@gov.bc.ca as well as the Ministry requisition preparer and Ministry requisition requestor confirming the successful import to BC Bid.
 - b. Email contains the requisition number and requisition ID for searching in BC Bid.
 - c. Email notifications will also be sent for amended requisitions. The contents of the email will indicate if it is an amendment to a requisition.
4. PSB buyer or ITQ supervisor completes intake/assignment process.

Draft/Issue ITQ

1. PSB buyer locates the Sourcing Project BC Bid

- a. The PSB buyer will use the requisition ID contained in the notification email to search for the Sourcing Project. The **Limit to my scope** checkbox is to be unselected.
2. The PSB buyer drafts the opportunity in BC Bid
 - a. If the opportunity is a Direct Award, see the Direct Awards section.
 - b. The PSB buyer adds the Ministry buyer to the team with the Read-only role.
 - c. If changes to the requisition information are needed, PSB can ask the Ministry buyer to amend the requisition.
 - i. Amended requisitions are imported as new draft versions of the ITQ.
3. PSB buyer issues and closes the opportunity in BC Bid
 - a. Amendments – may get issued because of an amended requisition or due to a supplier question and does not need the requisition amended.
 - b. Addenda – providing clarifying information due to a supplier question.

Direct Awards

1. The desired supplier will be added to the ITQ, and post publicly checkbox will be unchecked.
2. The Supplier will need to respond to the opportunity.

Analyze/Award/Close

1. PSB admin enters offline submissions in BC Bid, creates new suppliers in BC Bid, if needed.
2. PSB buyer completes evaluation and award in BC Bid
 - a. For successful supplier only PSB admin confirms or requests: CFS Supplier #, Site code.
 - b. PSB buyer confirms award criteria with Ministry buyer using the discussion forum and Ministry buyer logging in to view results.
 - c. PSB buyer confirms tax verification letter status with the successful supplier for opportunities over \$100k using the discussion forum or the successful notification email.
3. PSB buyer ensures PSB buyer initiates BC Bid-CFS integration with award information by clicking the Generate PO button.
4. PSB buyer sends notifications to successful and unsuccessful suppliers.

5. PSB buyer completes the Contract Award Summary (with the PO # generated above) and including the Direct Award justification if needed.
6. PSB buyer closes RFX and Sourcing project.

Purchase Order

1. The Ministry Client completes the PO in CFS and sends PO to supplier.

Appendix 4: Corporate Financial System (CFS) Resources

Resources for Ministry Buyers for Corporate Financial System (CFS) to create requisitions and issue Purchase Orders.

These links are owned and managed by Ministry of Finance.

[Ministry CFS Resources](#)

[iProcurement Sourcing via BCBID](#)

[Purchase Order Print Report](#)

Sourcing Project Roles Chart

✓ users with that role can complete the function

Orange users with that role are the only ones that can complete that function

BC Bid Function	Responsible	Official Contact	Contributor	Read-only	Notes
Edit the sourcing project	✓	✓	✓	-	
Add members to Set up Team tab	✓	-	-	-	
Send and receive Discussion Forum messages	✓	✓	✓	✓	
Receive Discussion Forum messages from suppliers	-	✓	-	-	
Add/edit documents (Set up Documents or Prepare RFx Documents)	✓	✓	✓	-	
Add suppliers to a Sourcing Project	✓	✓	✓	-	
Create a supplier* (from Add Suppliers menu)	✓	✓	✓	-	
Edit the opportunity	✓	✓	✓	-	
Add/edit items tab (ITQ and Timber Auction only)	✓	✓	✓	-	
Delete a draft RFx	✓	-	-	-	
Issue (post) opportunities	✓	-	-	-	
Create an amendment	✓	✓	✓	-	Some opportunity types, only responsible can create
Edit an amendment in draft status	✓	✓	✓	-	
Issue an amendment	✓				
Enter supplier offline submissions	✓	✓	✓	-	
Unseal supplier submissions	✓	-	-	-	
View and download supplier submissions (once unsealed)	✓	✓	✓	✓	
Award a decision	✓	✓	✓	-	
Shortlist suppliers from an opportunity	✓	✓	✓	-	
Send successful and unsuccessful notifications	✓	✓	✓	-	Best practice for the Official Contact to send notifications
Create the contract award summary	✓	✓	✓	-	

Create a new (draft) lot	✓	✓	✓	-	
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* Suppliers can also be created by selecting **Suppliers** from the main menu, then selecting **Create**. Users don't need to have a role on a team to create a supplier from the Suppliers menu.

BCBid