BCBid

Broader Public Sector Buyer Guide

BRITISH COLUMBIA

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 to the Broader Public Service (BPS) on how to use the BC Bid application.

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 in your PDF reader, click Control-F4.

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**.

Abbreviated sections of this document have also been created as Quick Reference Guides (QRG) and are available on the BC Procurement Resources site.

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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General Interface

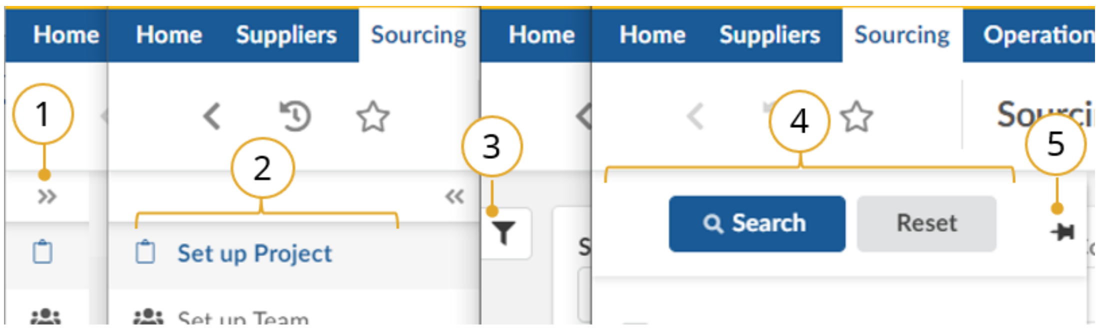
This section describes some general functionality of BC Bid.

Browser Types

BC Bid will work with all modern web browsers. Microsoft Edge or Google Chrome are recommended. **BC Bid is not compatible with Internet Explorer**.

If using Firefox, ensure that popups are allowed. Do not click the “Don’t allow env.ivalua.ca to prompt you again” message.

Expand/Collapse Menu and Expand/Collapse Filters



1. The left-hand menu can be expanded or collapsed by selecting the **double arrow**. When collapsed the icon related to each step is visible, hover over the icon to see the name.
2. Expanded view.
3. Filters on tables can be expanded by clicking the **funnel icon**.
4. Expanded.
5. Click **pin icon** to keep open.

Search Commodity Codes

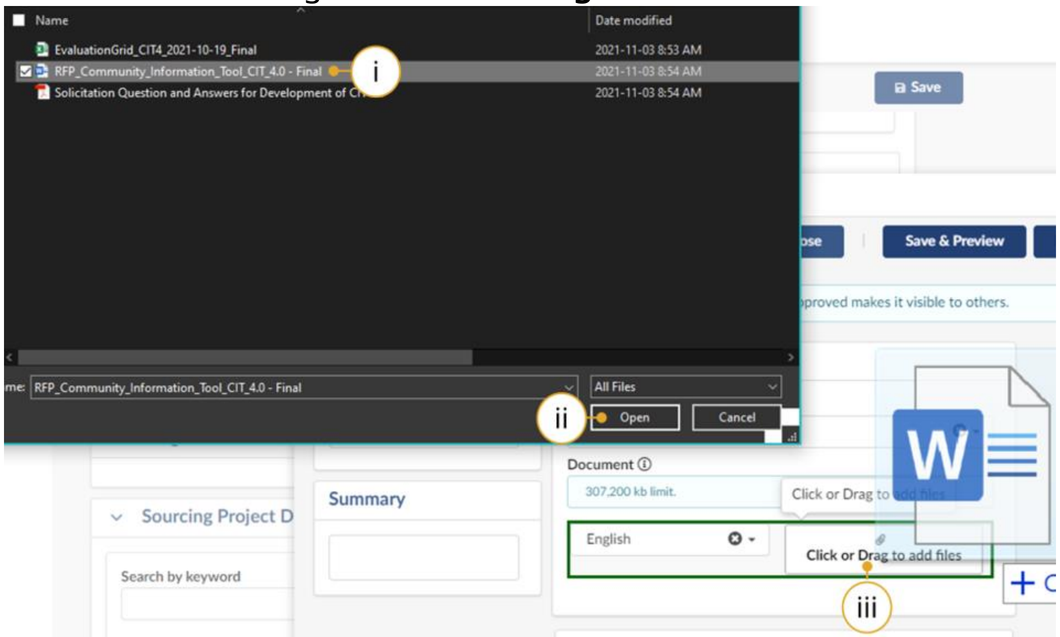
In the Commodity Code search pop-up (only), the search is *first match* not *best match*. First match relates to close spelling as you progress down the alphanumeric tree, whereas best match considers context. Alternatively, searching in the Commodities drop-down produces a *best match* result.

Note that when there is an active search, the commodity code selector sticks to the search results. Be sure to reset the search to allow you to expand the selection you want. You can also update your search to include results with terms in that specific tree.

For more details, please see the Commodity Codes video.

Adding files

Files are added using the **Click or Drag to add files** button.



i. Select the document to upload.
ii. Click **Open.**
iii. Alternatively, open Windows Explorer and drag the file to the Click or Drag to add files button.

File Size and File Formats

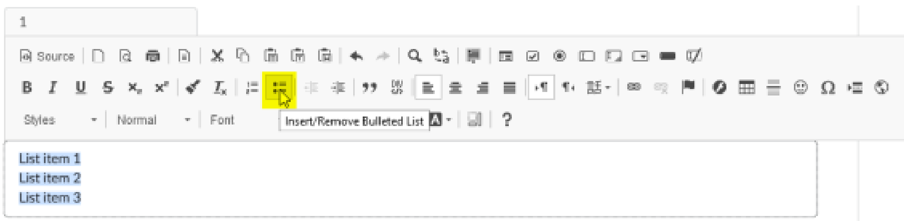
File uploads are limited to 500 MB. An individual file of 500MB can be uploaded. If multiple files are being uploaded at the same time, the total size must also be under 500 MB. File types include common business application file types. There are an unlimited number of attachments.

Text Fields Editing Toolbar

Most text fields in the application allow for the entry of rich text using the editor or What You See Is What You Get (WYSIWYG) toolbar. Only some of the buttons on this toolbar are operational.

Copy/Paste: Use CTRL+C for copy and CTRL+V for paste instead of mouse-click (right-click).

Also note that pasting in a bulleted list from an external document may not work as expected. Copy in an un-bulleted list of text, select these rows of text, and then click the Bulleted List icon in the toolbar.



Close to Save Using “X”

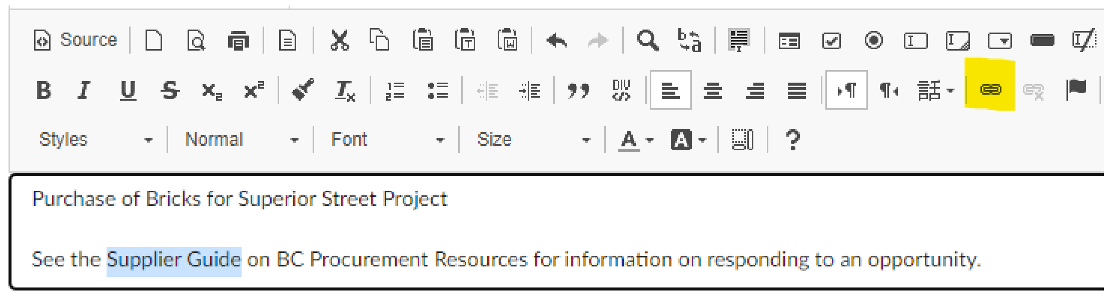
In many instances throughout BC Bid, you will make selections in a dialog box. In cases where you do not see a Save & Close button, click the “X” at the top-right of the dialog box, the application saves your entry.

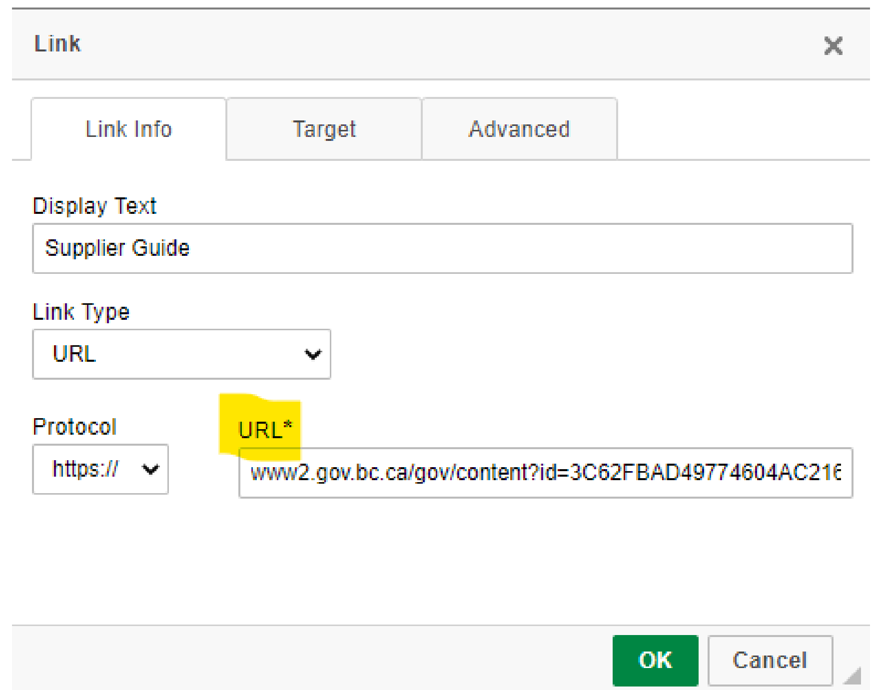
Adding a Link to a Text Field

Create New Link

To create a new link directly from a web page:

1. Copy link from web page.
2. Paste link into text field.
3. Select text link and click the link button.
4. In the dialog box, paste web address into URL field.
5. Click Ok.





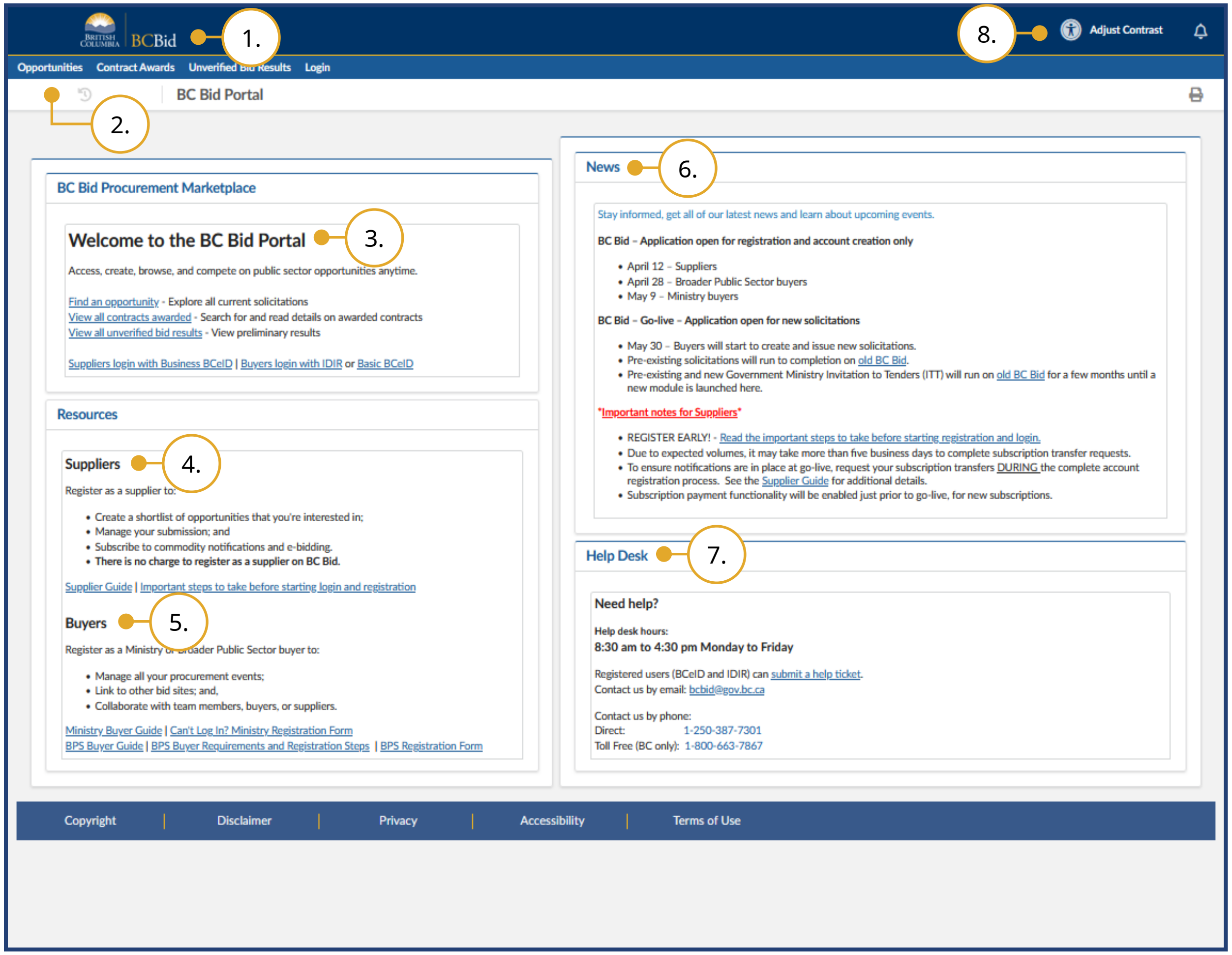
Copy and Edit a Link

If copying a link from another source such as a word document:

1. Copy text with URL from word document or other source.
2. Select the link text and click the link button
3. In the dialog box, delete the content of the URL field.
4. Go to the webpage and copy the URL.
5. Paste into the URL field.
6. Click OK.

Public Portal, Registration and Login

URL: www.bcbid.gov.bc.ca

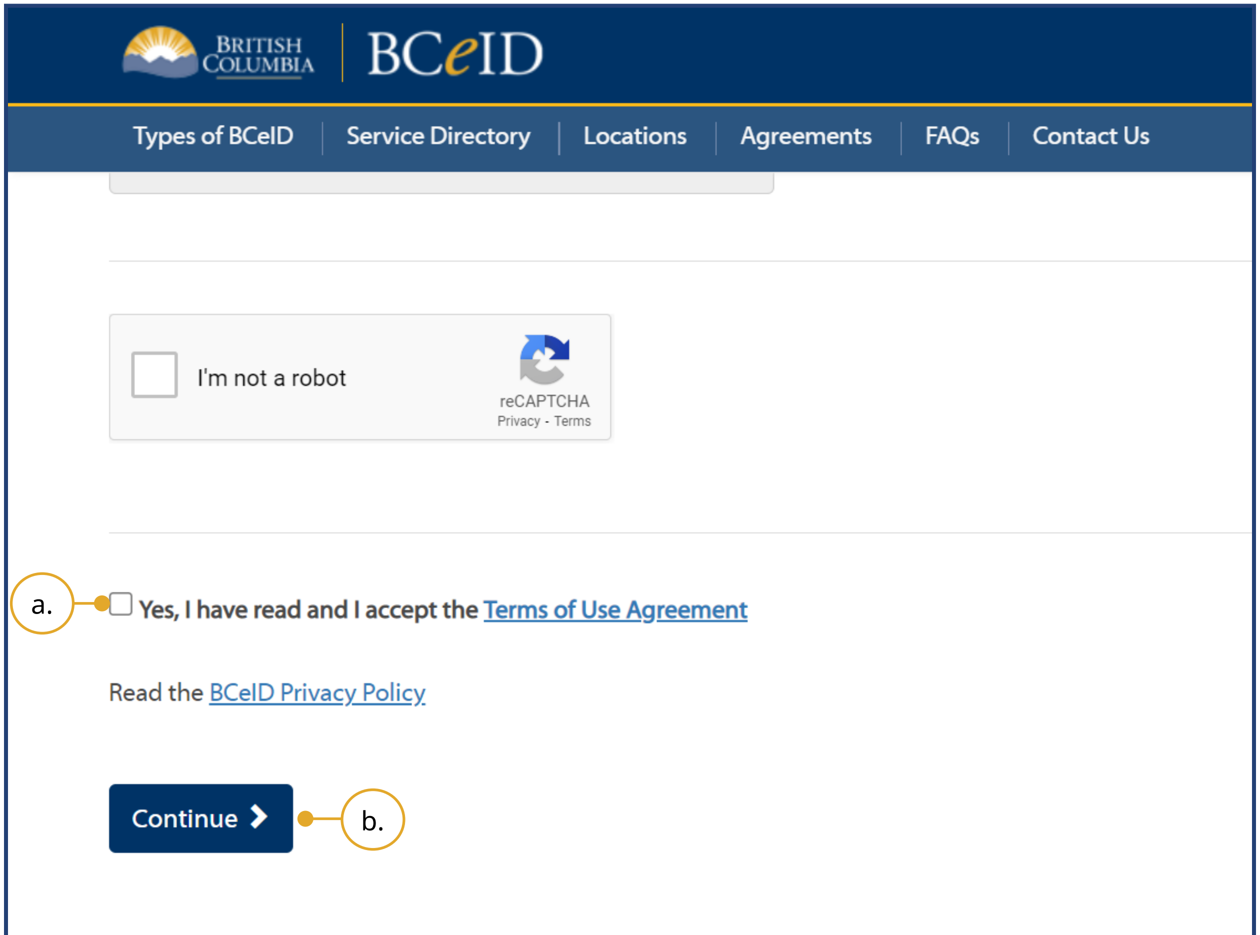


1. Click the **BC Bid** icon at any time to return to this main page.
2. Main menu has links to **Opportunities**, **Contract Awards**, **Unverified Bid Results** and **Login**.
3. The Welcome box will display a welcome message and quick links.
4. Supplier Resources are listed. Learn about benefits to registration and follow links to registration form and login.
5. Buyer Resources are listed. Follow links to access buyer resources pages, registration form and login.
6. News and upcoming events will be posted here.
7. Help Desk contact information including a link to the ticket system.
8. **Adjust Contrast** – Click here to activate a higher contrast dark mode

Navigating the Public Portal

Registration

Only users whose organizations have submitted Access Agreements will be able to register their BC Bid accounts.



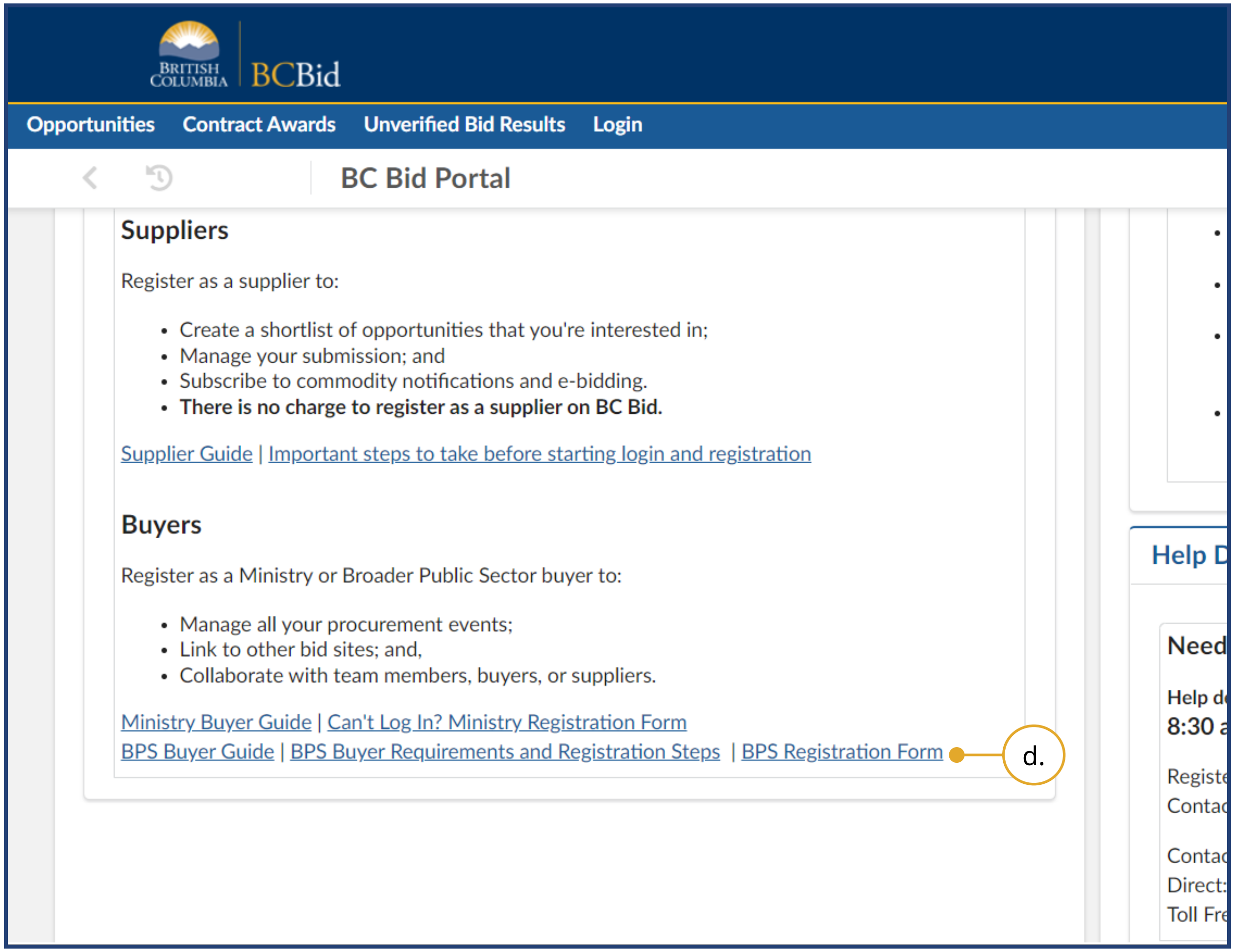
1. If you don't have an IDIR, register for a Basic BCeID using the following link: [Register for a Basic BCeID](#).
   a. Complete the form, then select the **Terms of Use Agreement** checkbox.
   b. Click **Continue**.

   You will see a "registration complete" screen with a summary of your registration. IDIR users can proceed to the next step.

   You will receive an account confirmation email from BCeID@gov.bc.ca.

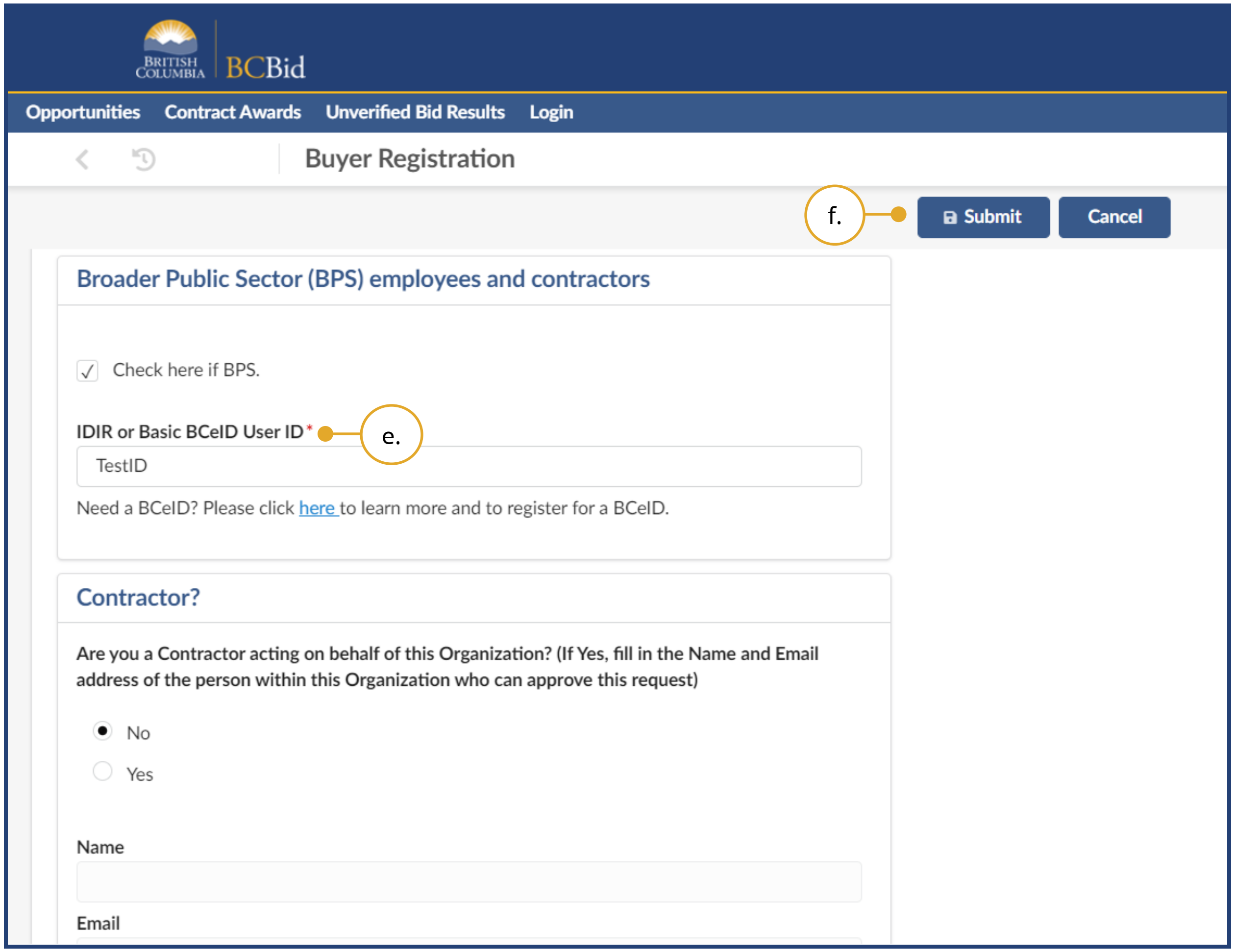
   BPS Registration

The Basic BCeID registration link is available on the BC Procurement Resources website. Buyers can navigate to that page by clicking the **BPS Buyer Requirements and Registration Steps** link on BC Bid Public Portal at www.bcbid.gov.bc.ca.



c. Register for a BPS Buyer account by visiting the BC Bid Public Portal at www.bcbid.gov.bc.ca.

d. In the Buyers section, click the **BPS Registration Form** link.



e. Complete the form and then in the Broader Public Sector (BPS) employees and contractors section, enter your **IDIR or Basic BCeID User ID** in the text box.

f. Click **Submit.**

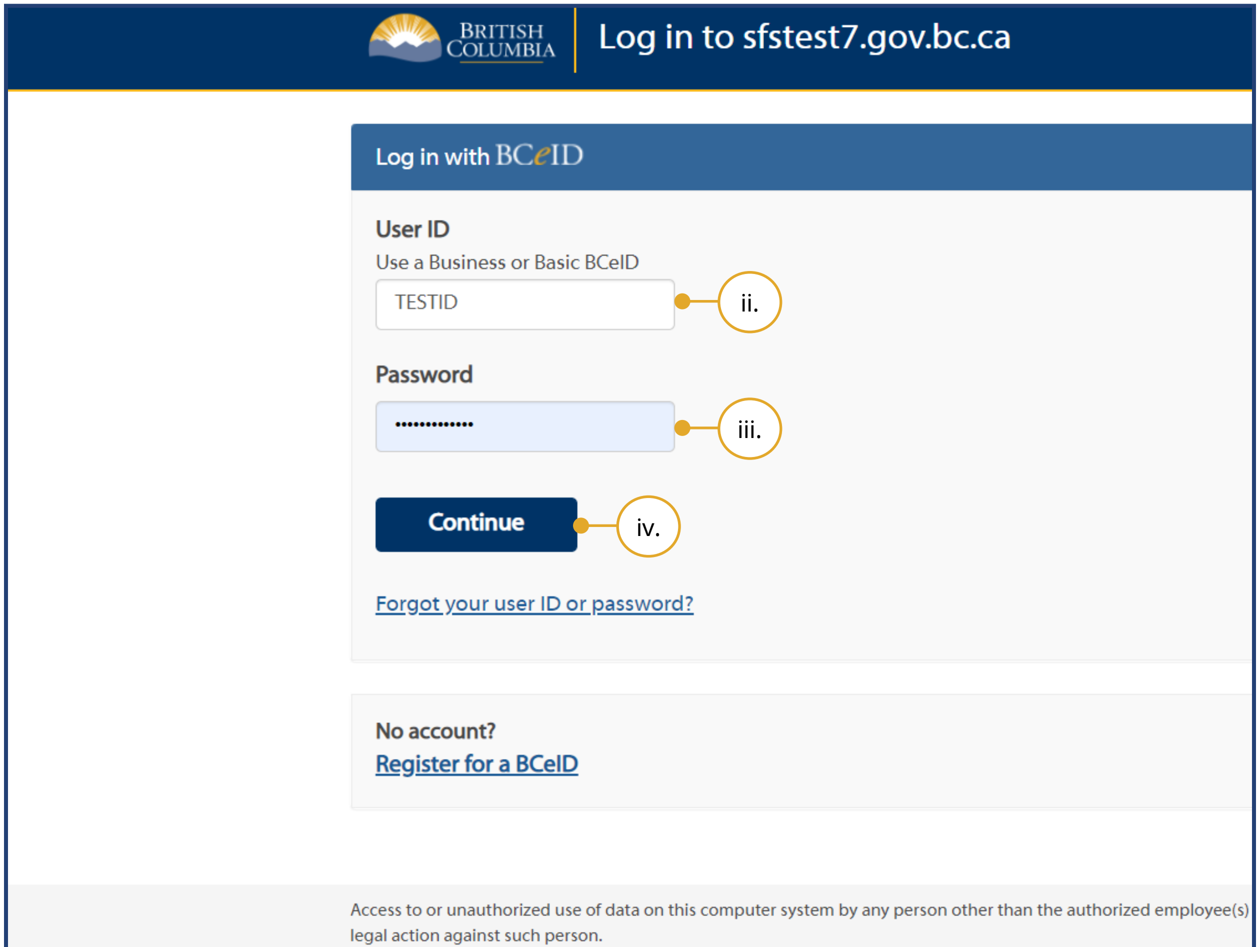
You will see a screen with a *Thank you for registering message*.

You will receive a *Your BC Bid Buyer registration has been received* email.

Review the instructions on the screen. If you are registering with Basic BCeID, click the **log in to BC Bid** link included in the confirmation email to complete your registration.

If you are registering with IDIR, proceed to the Buyer Dashboard Overview.

Login

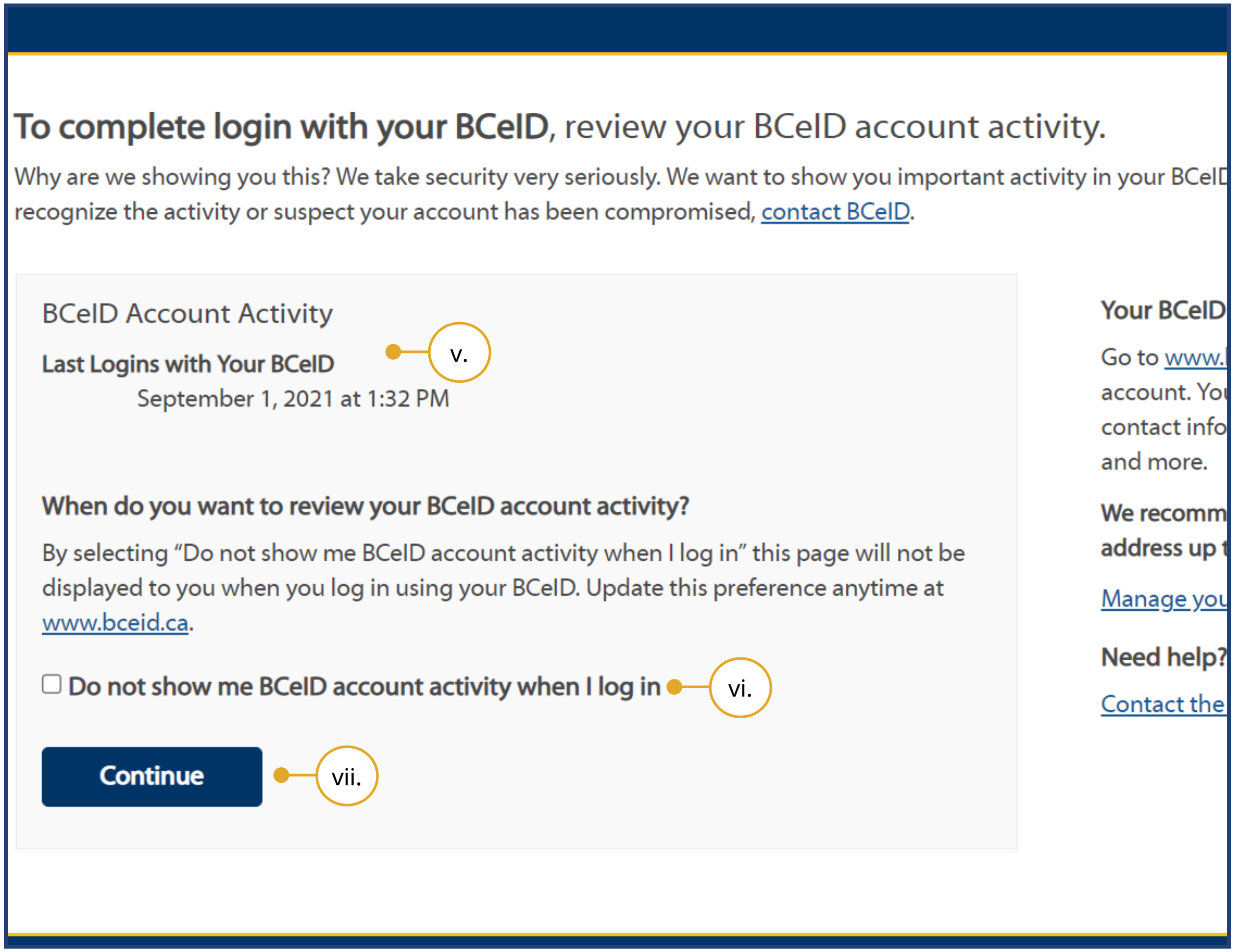


If you are registering with Basic BCeID, you will be redirected to the BC Bid application Log In page.

g. Log in to the application:
   i. Click **Log in with BCeID**.
   ii. Enter your Basic BCeID **User ID**.
   iii. Enter your **Password**.
   iv. Click **Continue**.

[Login and How the Buyer Dashboard works]

To reset a BCeID password, contact BCeID Help Desk at toll free 1-866-356-2741 or using the [Online Form].
To reset an IDIR password, contact Help Desk at 250-387-7000 or by emailing 77000@gov.bc.ca.



v. Review your BCeID Account Activity.
vi. *Optional*: Select the **Do not show me BCeID account activity when I log in** checkbox.
Selecting this option means this step will be skipped for future logins.
vii. Click **Continue**.

You will see a screen displaying an *Access Denied to BC Bid* message.

Note: This is a mandatory step. Your attempt to log in to the BC Bid application for the first time prompts BC Bid application to create your user account.

You will receive an email from the Help Desk after your registration is reviewed.

Registration can take up to two business days. Once the registration is accepted, you will receive a *Your BC Bid Buyer registration has been accepted* email.

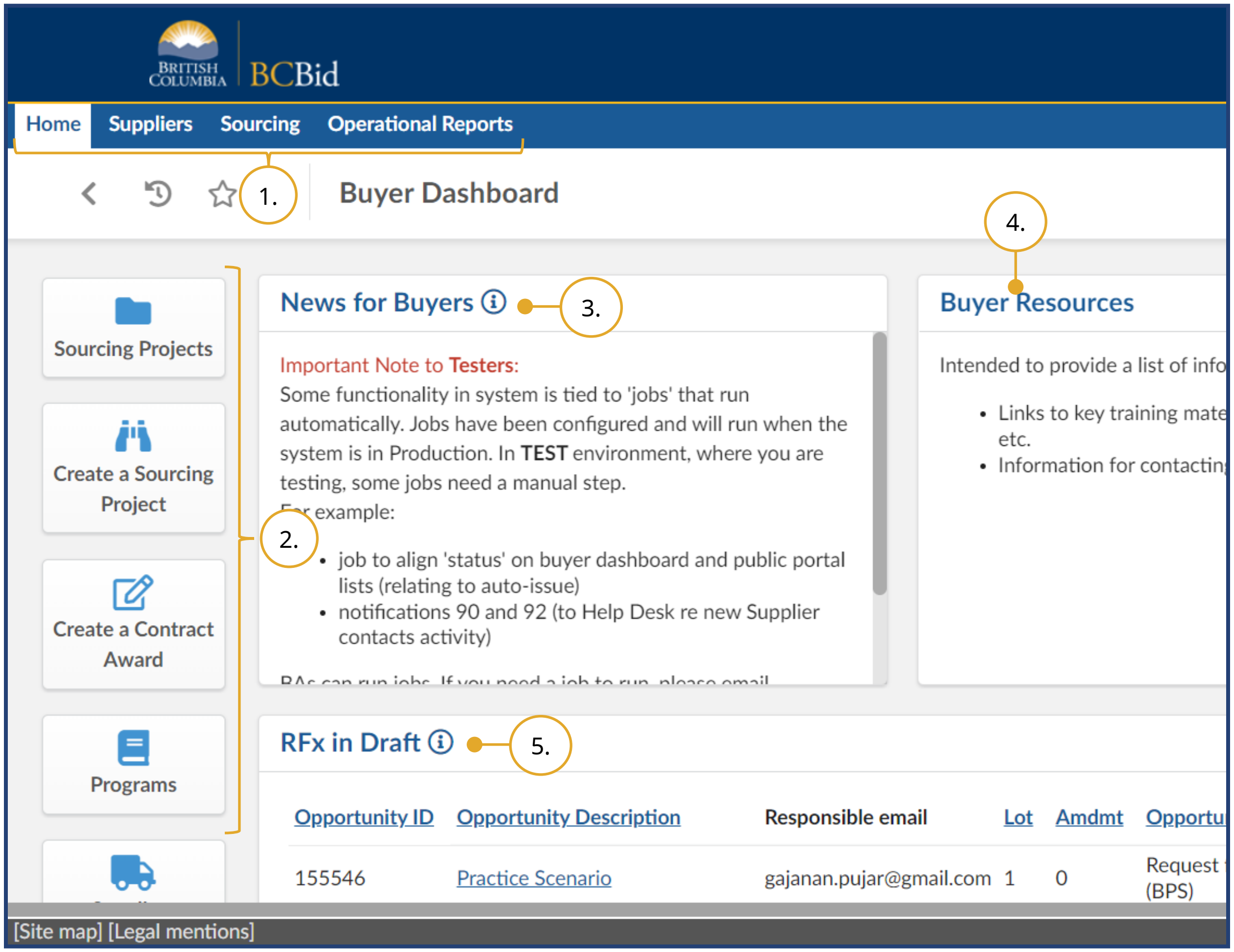
When you receive the email, log in to the BC Bid application using your IDIR or Basic BCeID.

Contact the Help Desk if you receive a *Your BC Bid Buyer registration requires follow up* email.

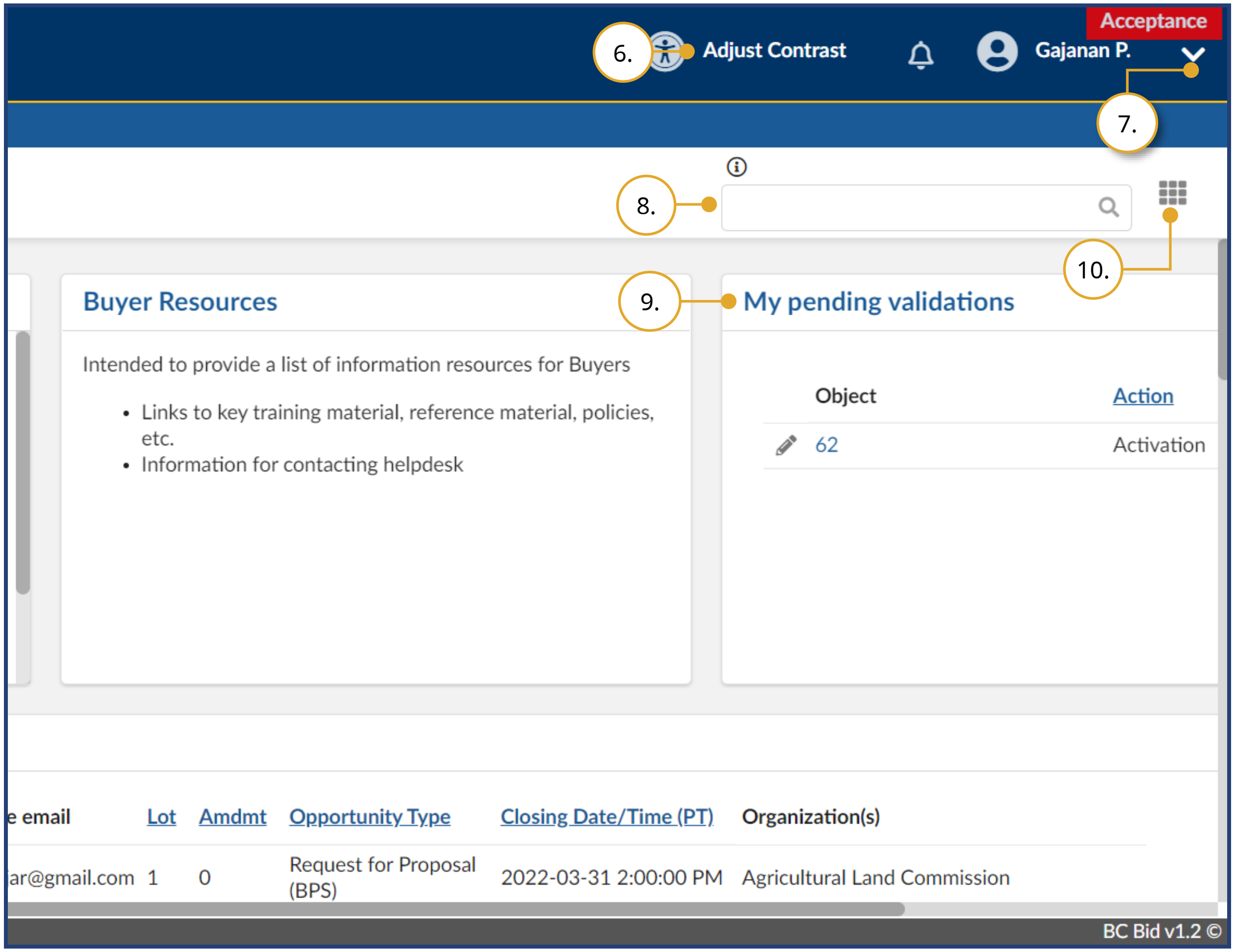
See Appendix 1 to view the Registration Messages

Buyer Dashboard

The Buyer Dashboard is the home page when buyers log in to BC Bid application. This section describes the layout and content of the home page.



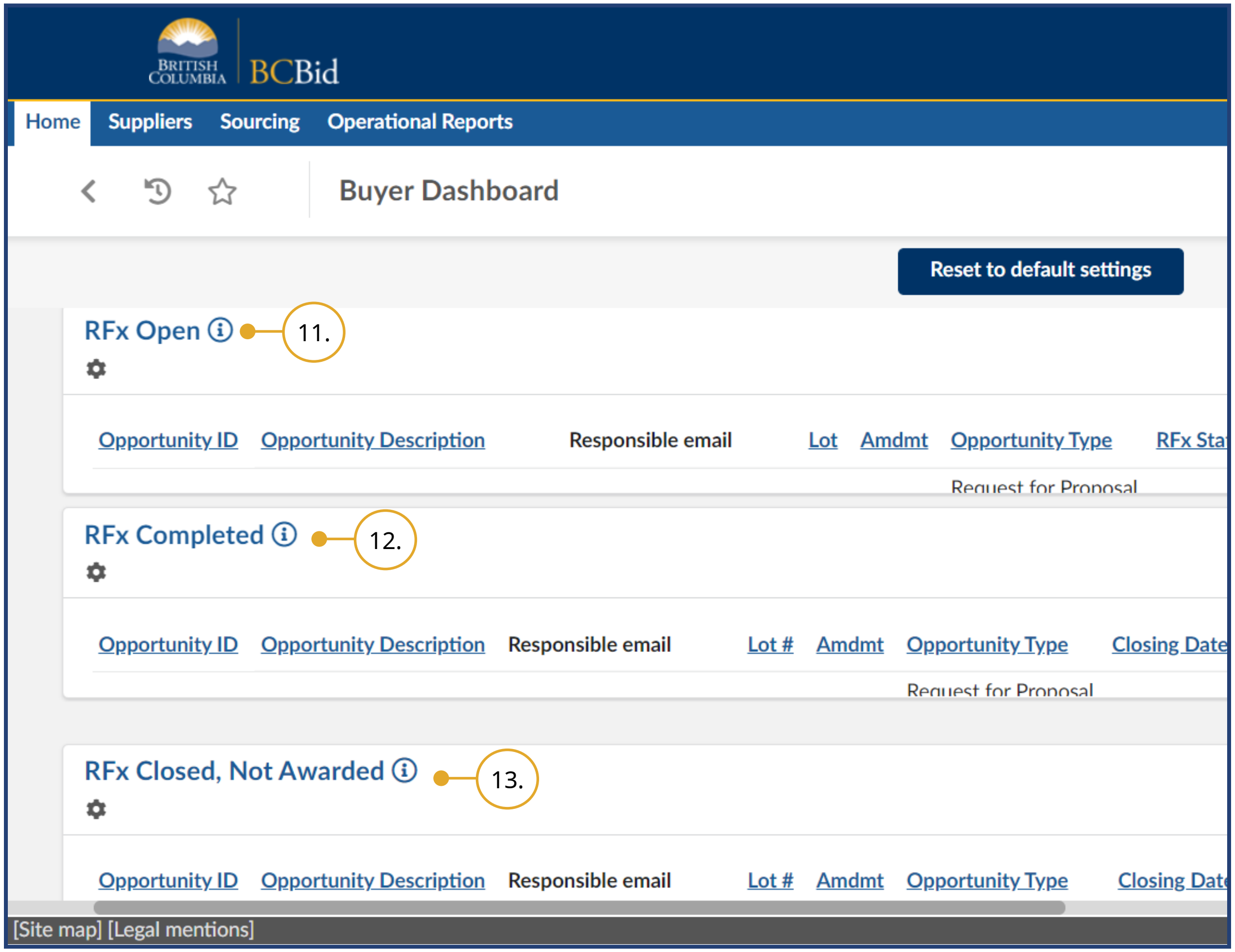
1. **Main Menu Bar**: Access to Home, Suppliers, Sourcing, and Operational Reports drop-down menus.
2. **Quick Access Menu**: Quick access to Sourcing Projects, Create a Sourcing Project, Create a Contract Award, Programs, and Suppliers (same as accessing through Main menu bar).
3. **News for Buyers**: Information for buyers from the BC Bid Help Desk.
4. **Buyer Resources**: Links to information such as key training material, reference material, policies, and the BC Bid Help Desk.
5. **RFx in Draft**: Shows project and or RFx lists within which you are a team member. The lists are sorted by Closing Date, with those issuing soonest at the top.



6. **Adjust Contrast**: Adjust your screen brightness to a darker mode or reset it to the default brightness.
7. **My Profile**: See Customizing My Profile for more information.
8. **Search** box.
9. **My Pending Validations**: Shows projects and/or RFxs where your action is required.
10. **Customize Dashboard**: See Customize Dashboard for more information.

Login and how the Buyer Dashboard works

The purpose of the **Search** box is to find Sourcing Projects created within your organization available to view, Suppliers, and Contracts.



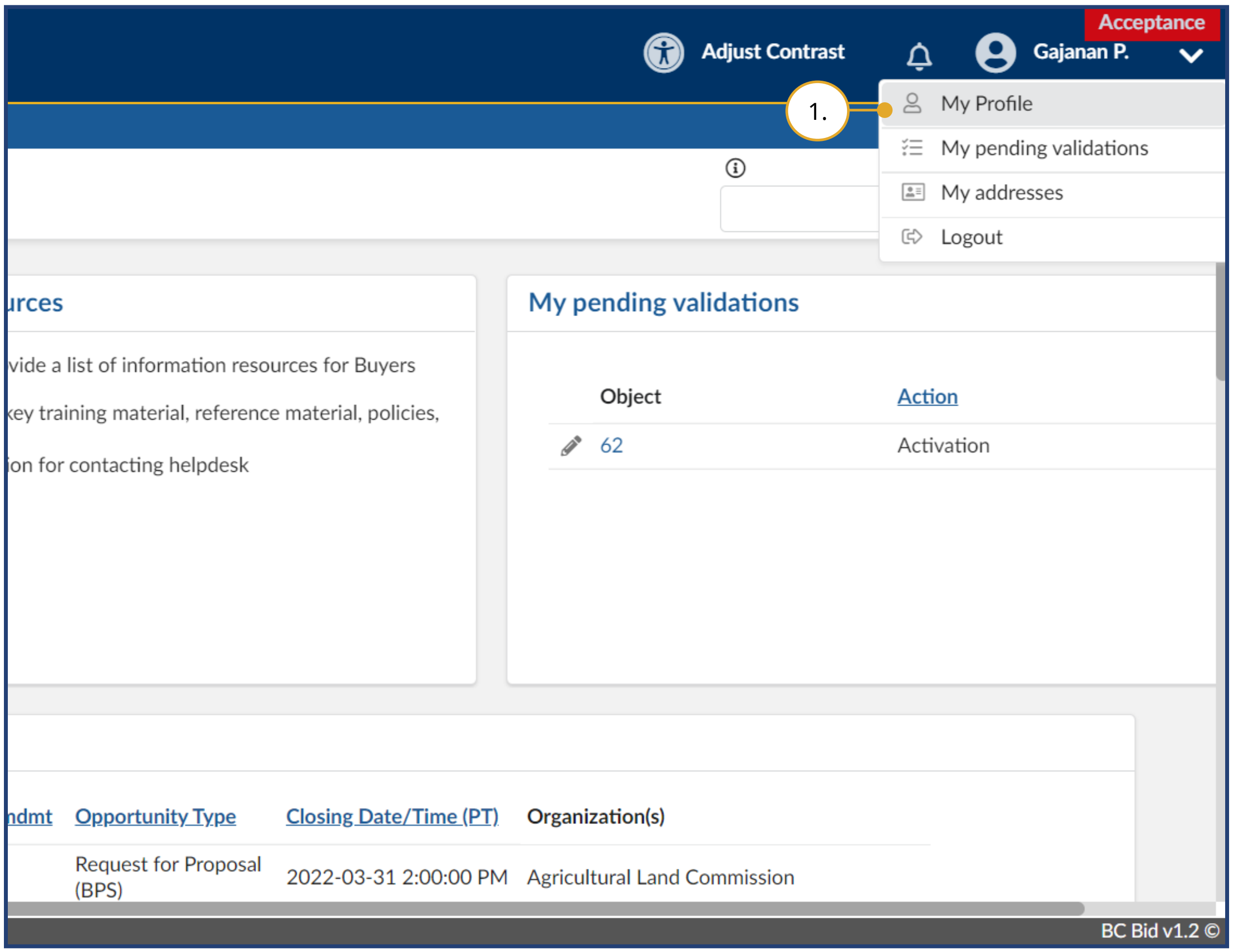
11. **RFx Open**: Shows open projects and/or RFxs where you are a team member. These are sorted by soonest Closing Date at the top.
12. **RFx Completed**: Shows completed projects and/or RFxs where you are a team member. These are sorted by most recent Closing Date at the top.
13. **RFx Closed, Not Awarded**: Shows closed projects and/or RFxs where you are a team member. These are sorted by oldest Closing Date at the top.

Customizing My Profile

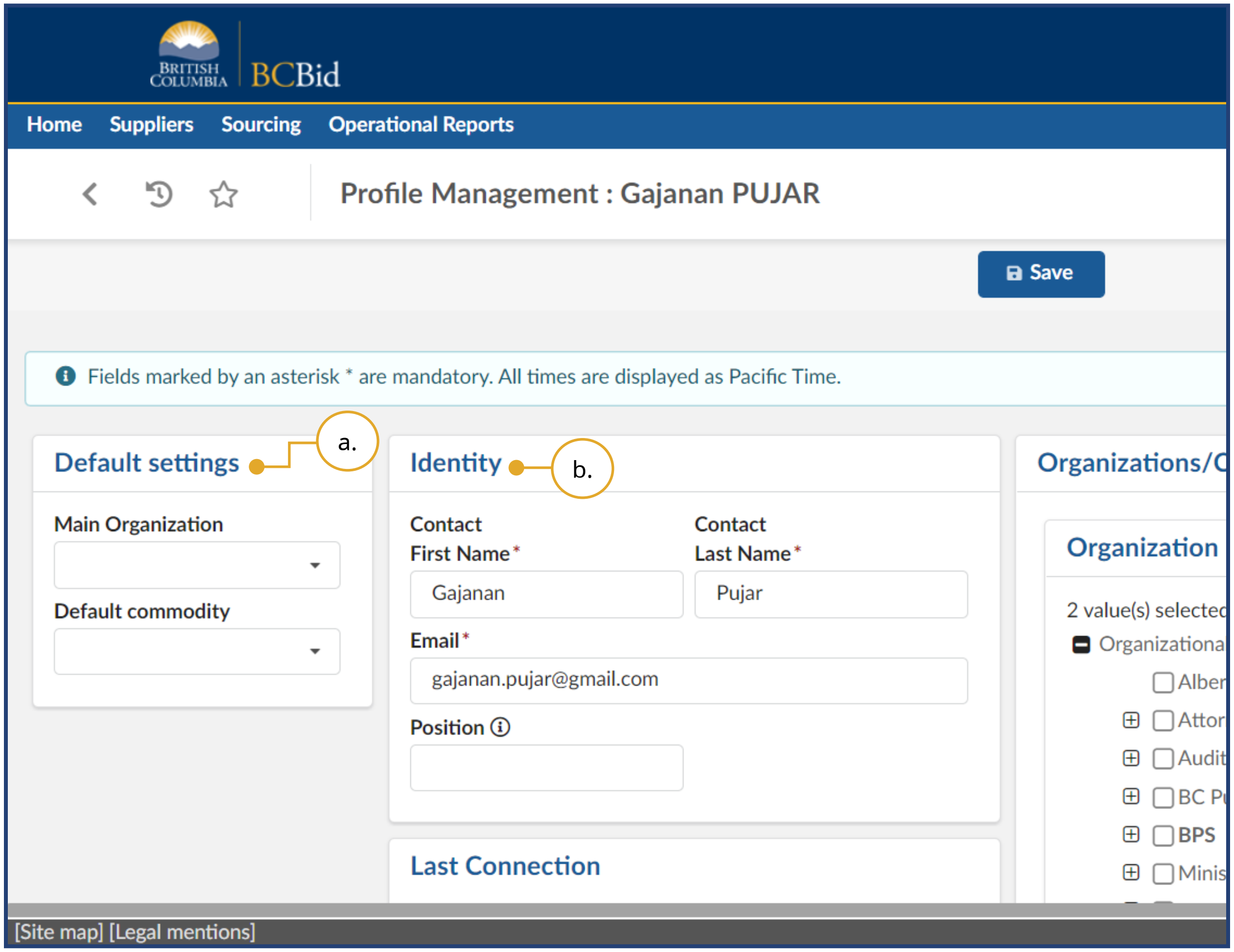
This section provides the steps for updating your profile in BC Bid application. It is not necessary to update or complete the profile, but there are features that may be useful to you. For example, if you usually buy for only one organization, that detail can be prepopulated in the Default settings.

Note: Other users can see some of the information within these profile pages, such as Identity, Addresses, Organization, and Purchasing Scope.

Edit My Profile



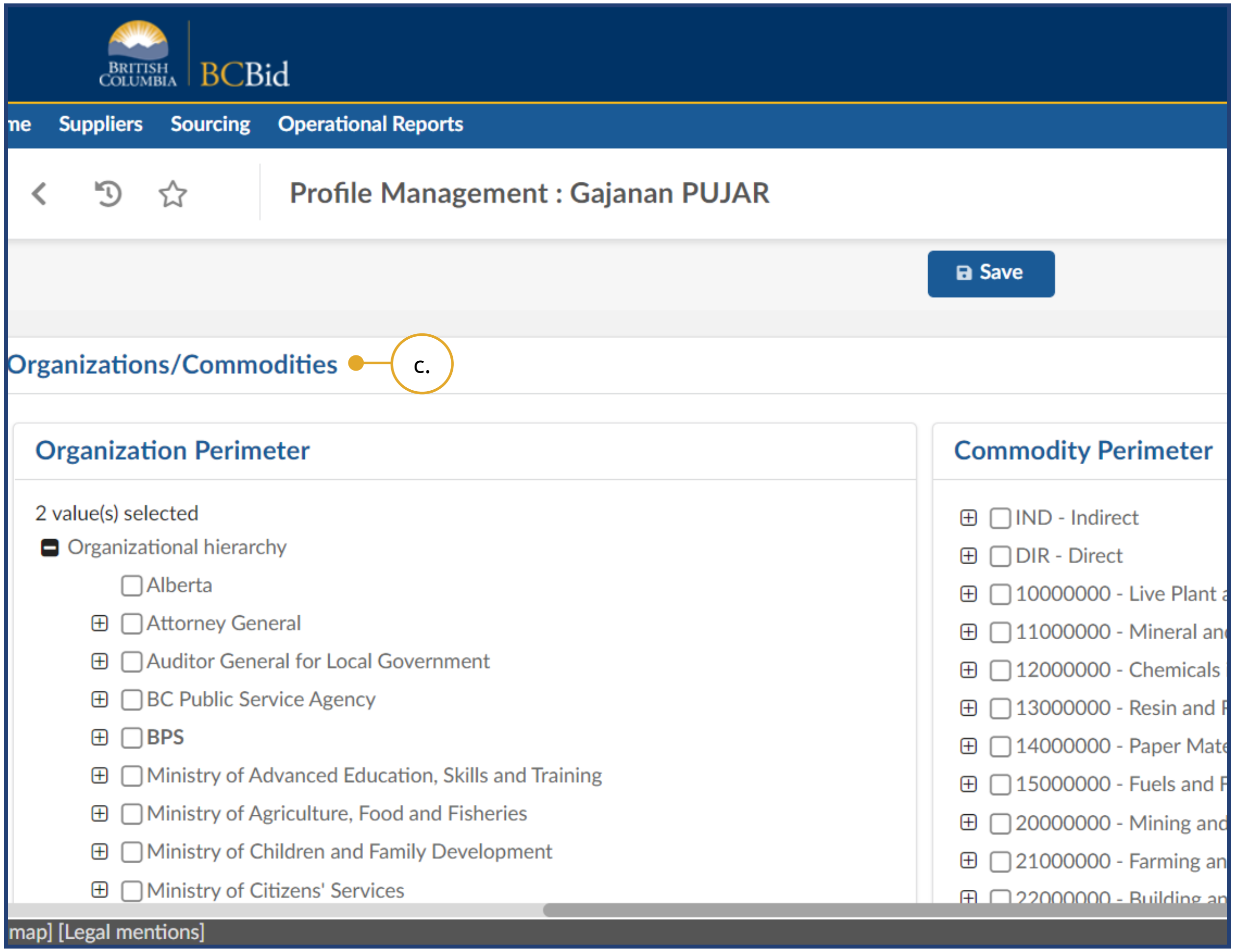
1. To customize your profile, click your name (top right-hand corner) and click **My Profile**.



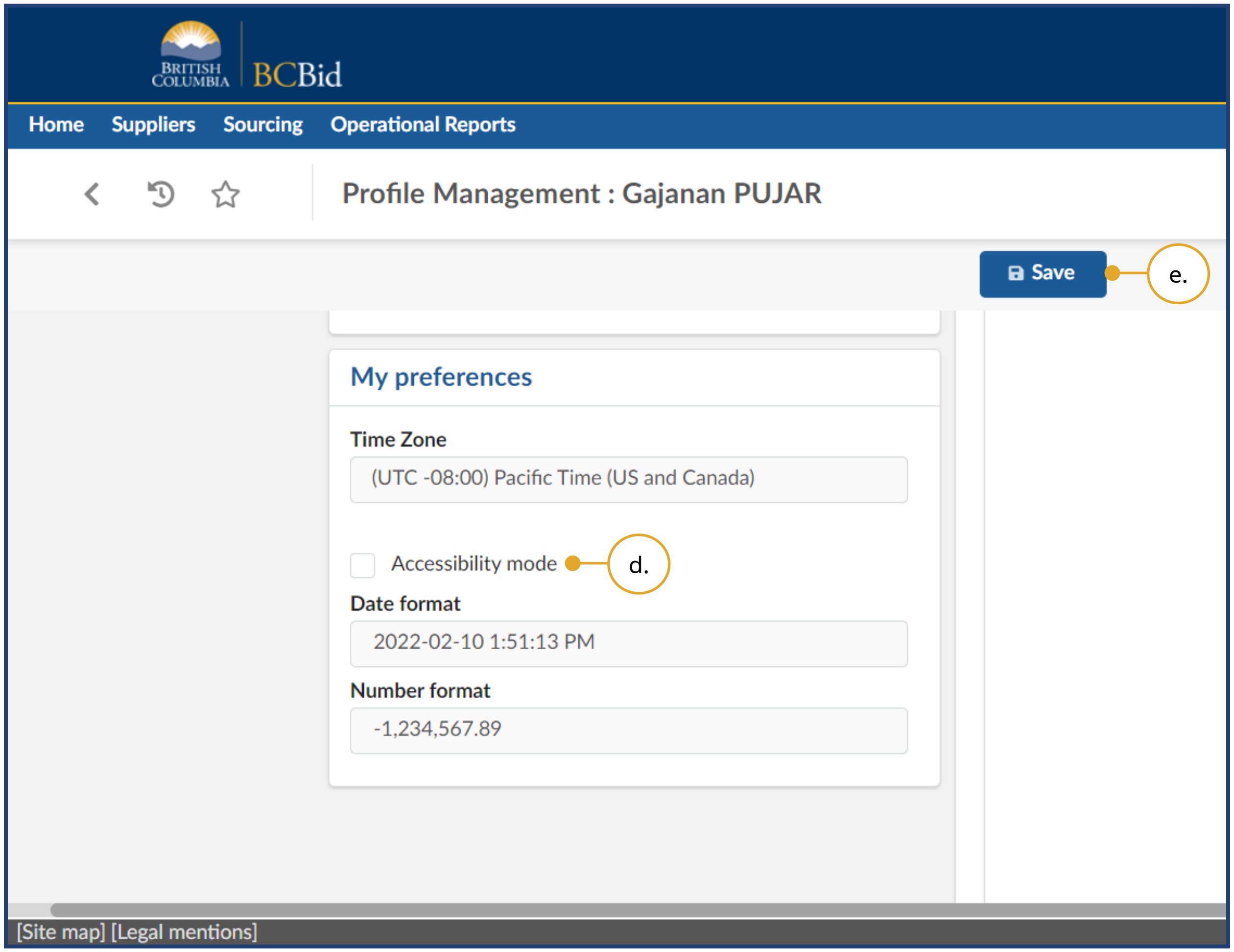
2. Available fields include:

a. **Default Settings**: Only the option selected in the Main Organization drop-down list will be prepopulated in future Sourcing Projects.

b. **Identity**: The details (except for Position) entered here will be prepopulated in future Sourcing Projects.

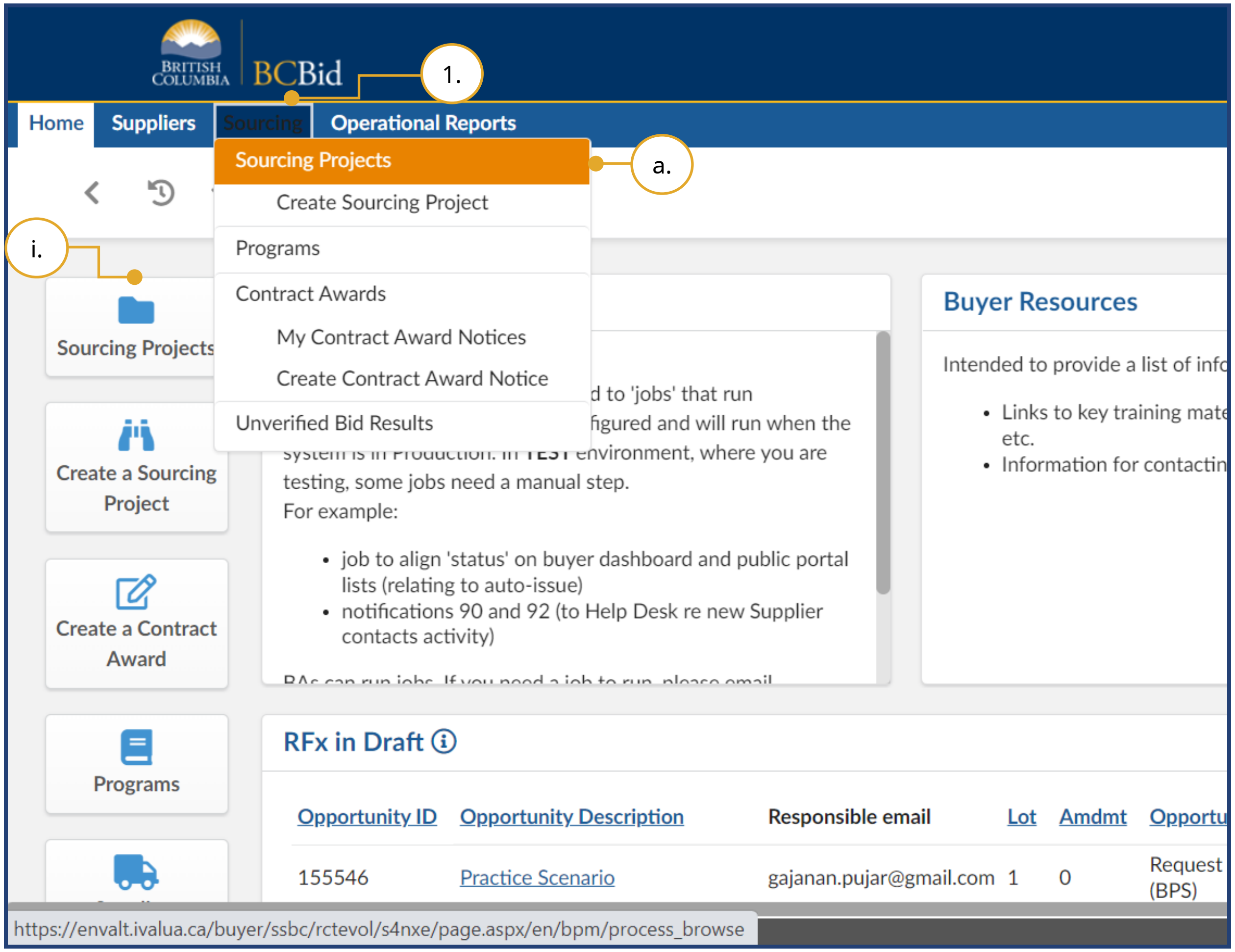


c. **Organizations/Commodities**: This section is controlled by Administrators. So, it is not applicable to any user.



d. **My Preferences**: The Accessibility mode setting allows users to adjust the zoom level.
e. Click **Save**.

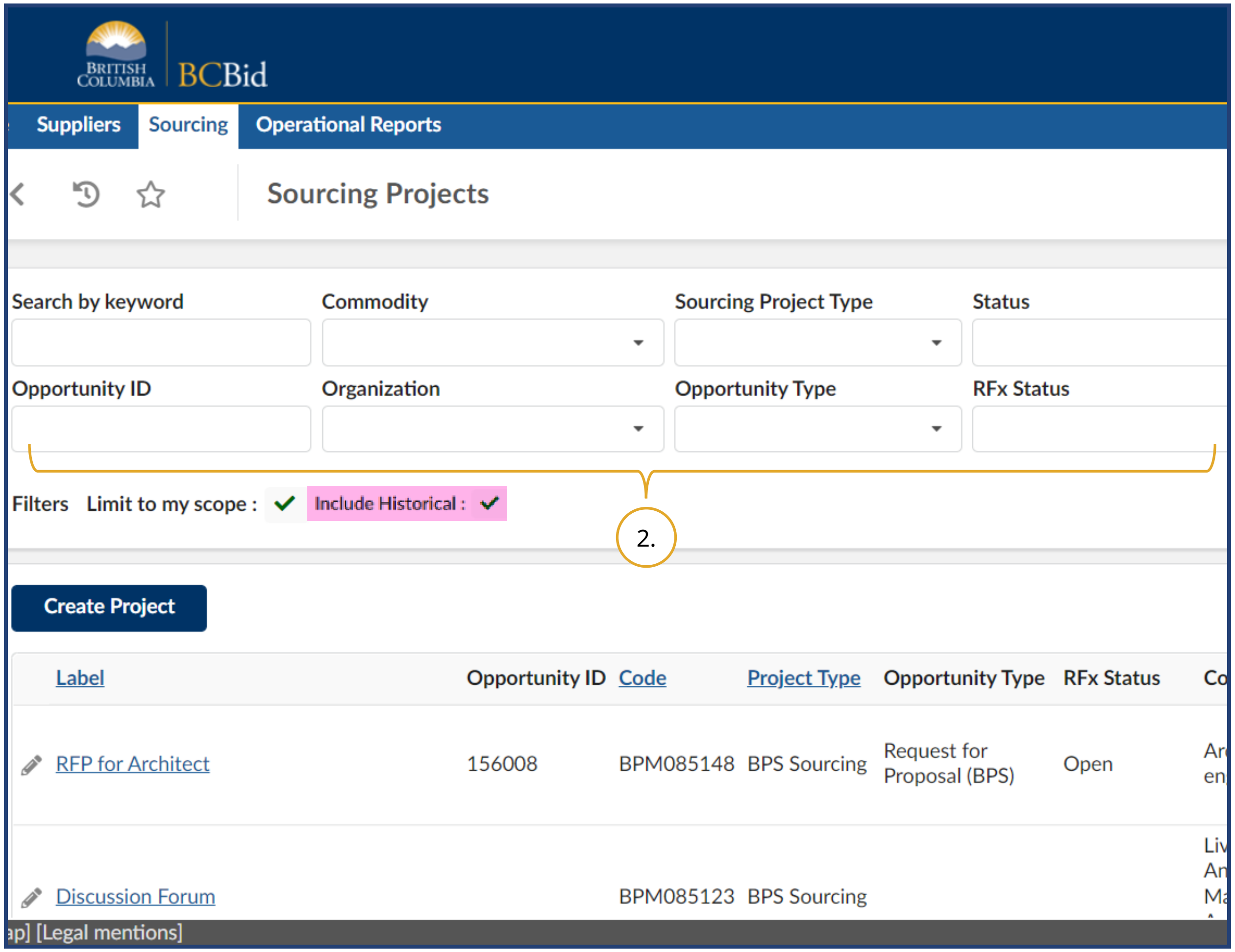
Explore Sourcing Projects/Opportunities



1. *Optional*: In the main menu, click **Sourcing.**
   a. Click **Sourcing Projects** to view all sourcing projects created within your organization available to view, or
      i. Click **Sourcing Projects** in the quick access menu.

[Exploring Opportunities]

Note: Users with the Manager profile can see all Sourcing Projects within their organization. They can also reassign the Buyer Responsible role in a Sourcing Project, to a different user.

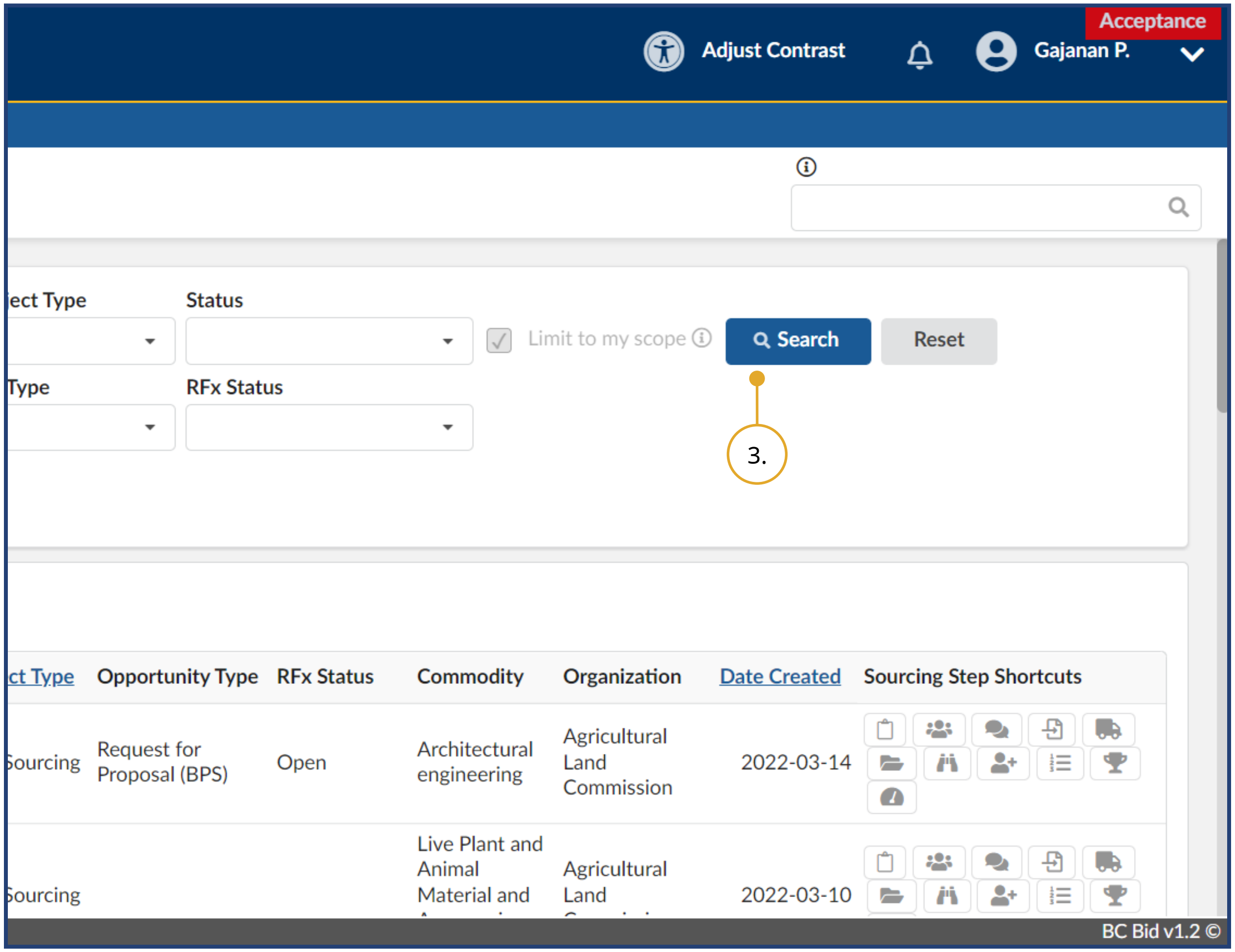


2. Search by: Entering keywords in the **Search by keyword** or **Opportunity ID** text boxes.
   Use one or more of the **Commodity**, **Sourcing Project Type**, **Status**, **Organization**, **Opportunity Type**, or **RFx Status** drop-down lists to filter.

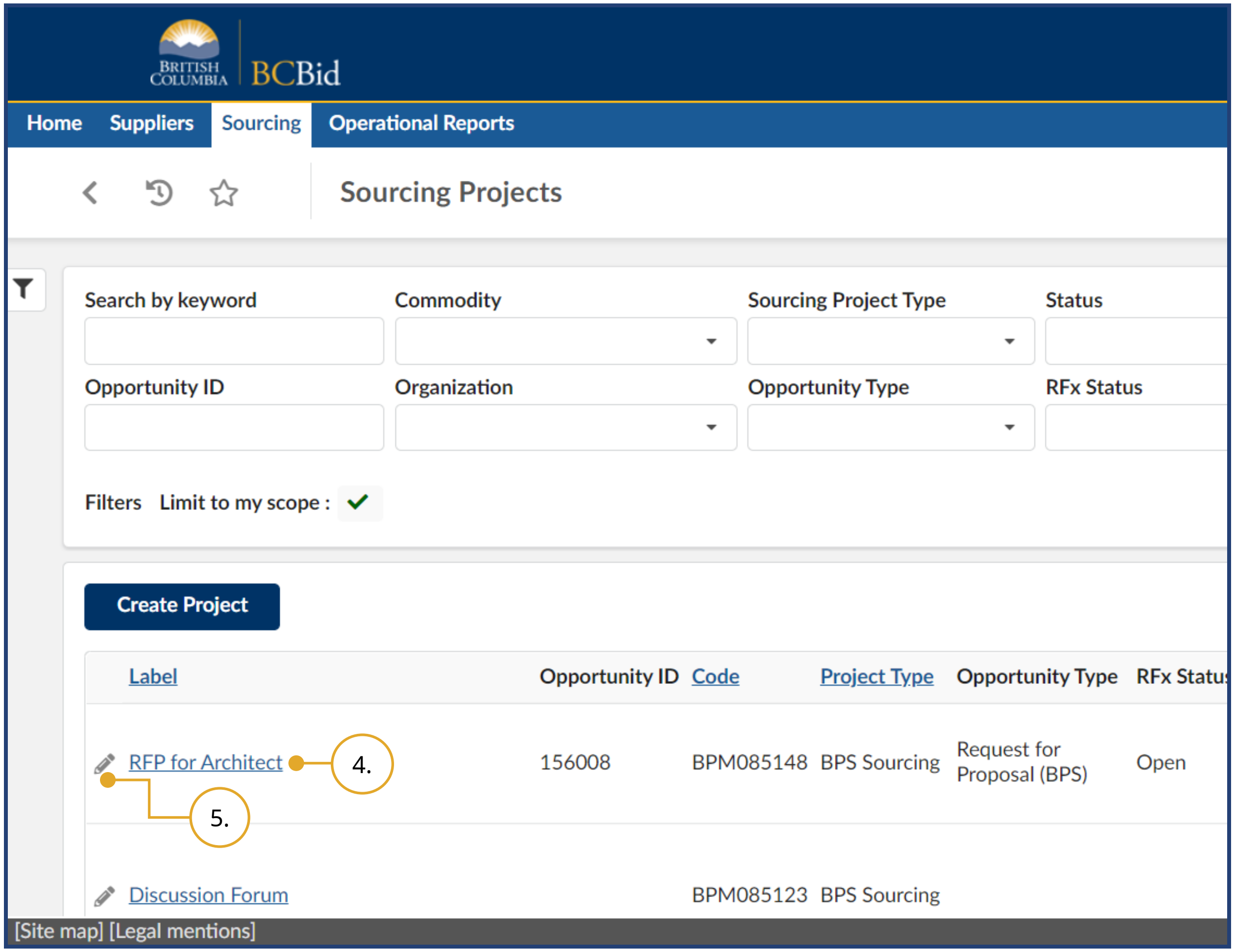
   Note: **Limit to my scope** is controlled by Administrator. So, it is not applicable to any user.

   Include Historical: Check this if you would like to include historical in your search, otherwise the default search will exclude historical data in the results.

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

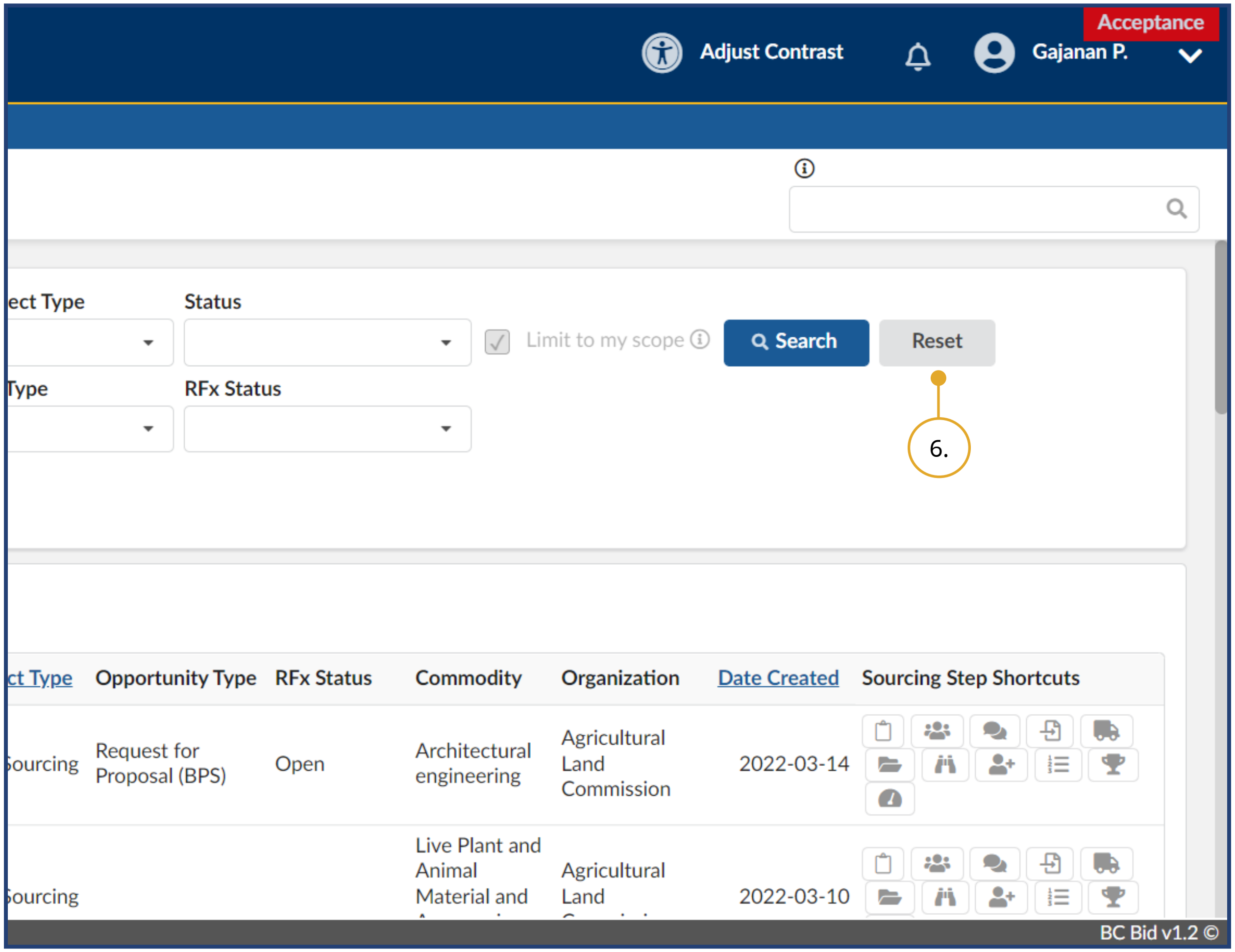


3. Click **Search**.
   The results will display in a list.



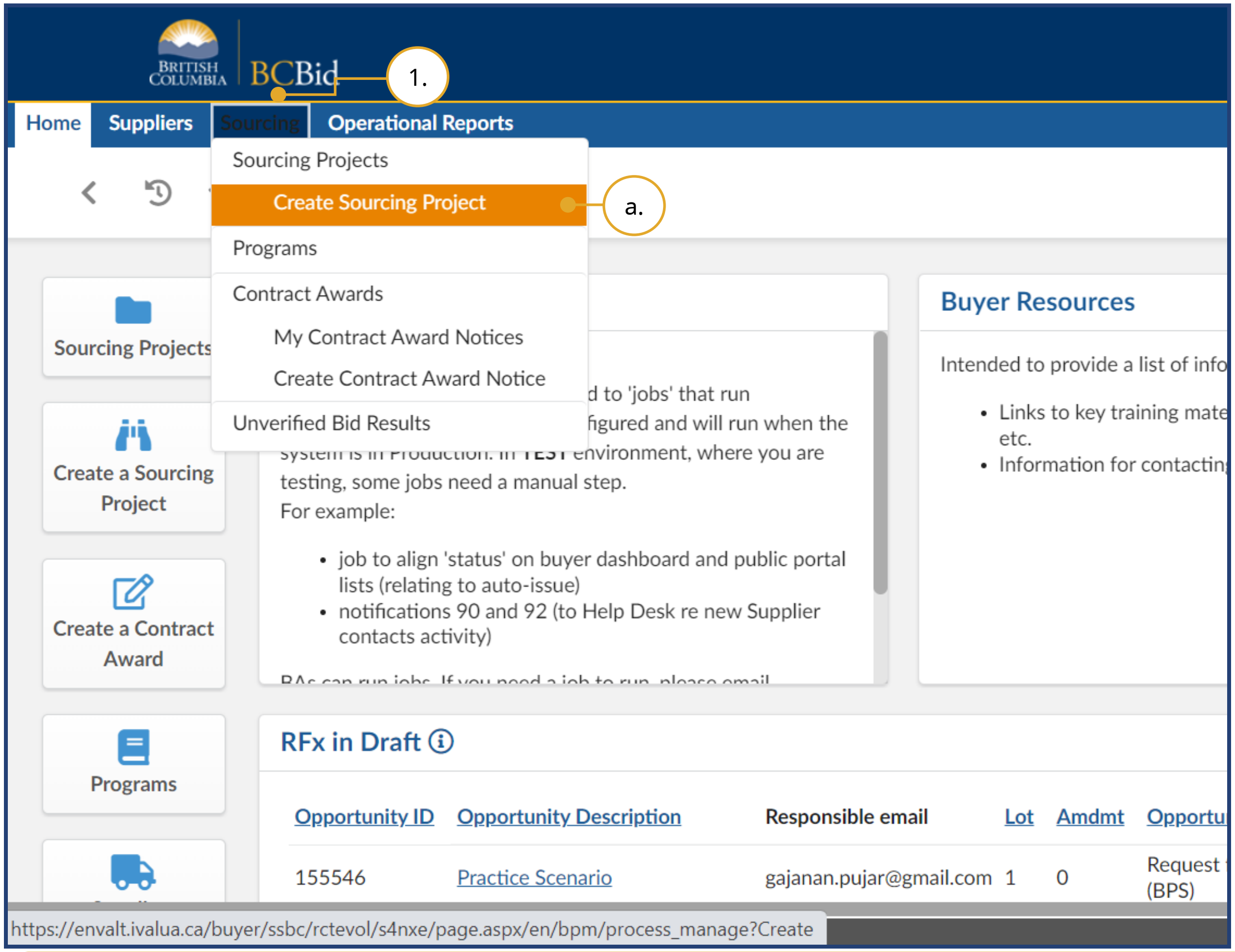
4. To review opportunities that are read-only access, click the **Label** of the appropriate Sourcing Project.
5. To edit opportunities that are available for editing, click the **Label** or **pencil** icon beside the appropriate Sourcing Project.

Code is an application generated unique identifier for a Sourcing Project.



6. Click **Reset** to start a new search.

Step 1 – Create a Sourcing Project



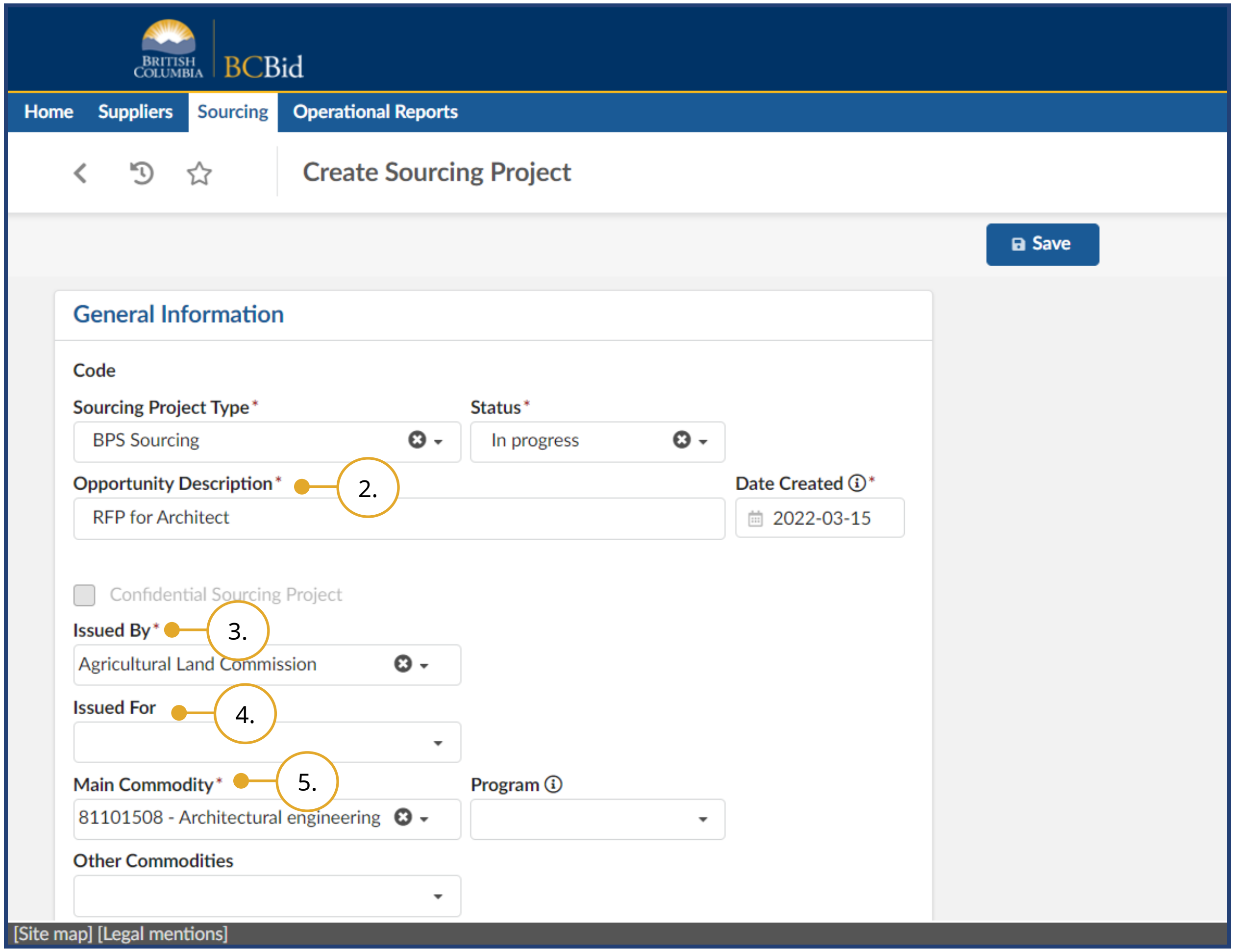
1. On the main menu, click **Sourcing.**
   a. Click **Create Sourcing Project**.

Note: A Sourcing Project can contain one or more opportunities as separate Lots for example, RFP, RFI etc.

[How to Create a Sourcing Project]

Alternatively, you can create a Sourcing Project by clicking **Create a Sourcing Project** quick access menu or by clicking **Sourcing Projects** quick access menu and then clicking **Create Project**.

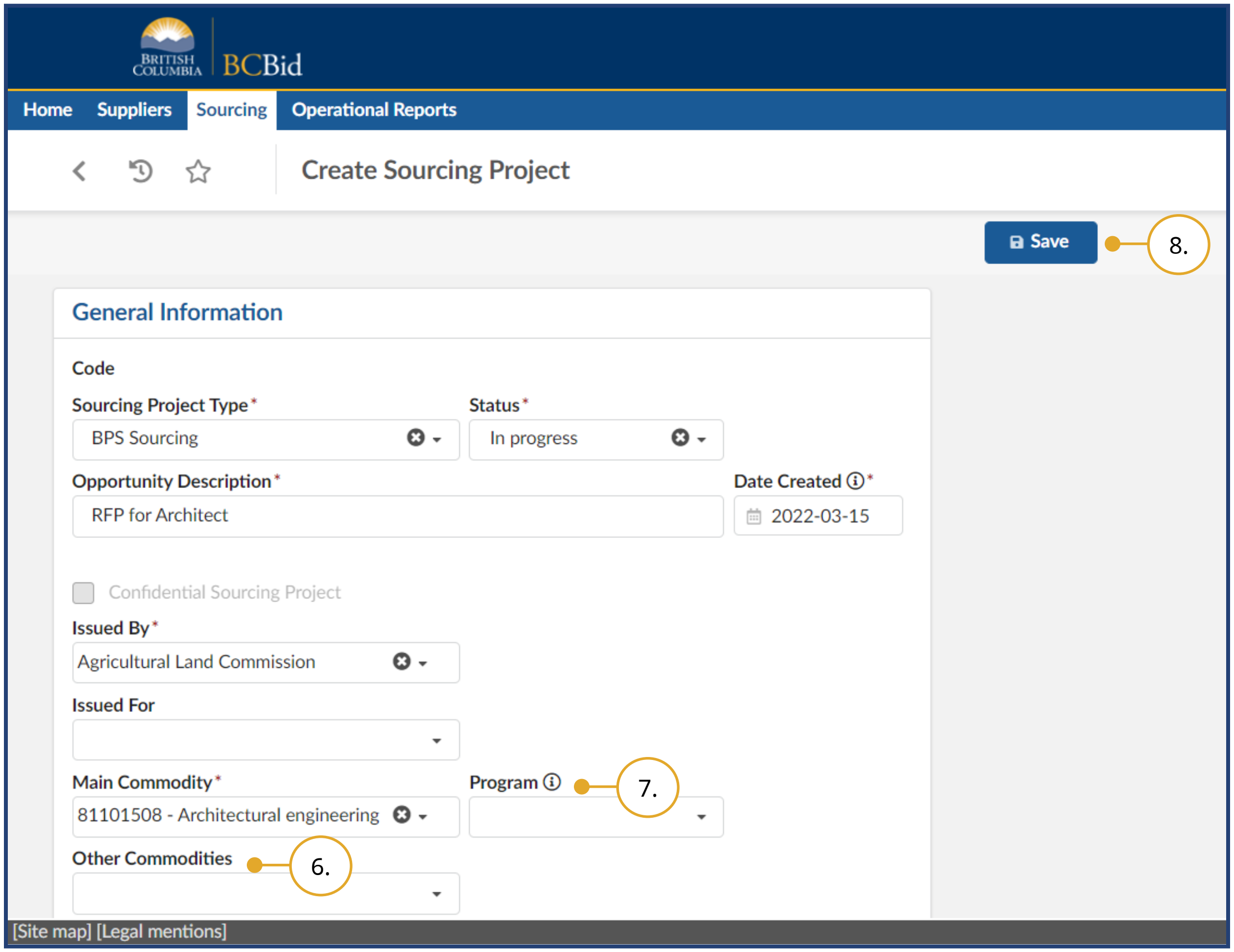
General Information Form



2. In General Information section, enter a description using the **Opportunity Description** text box.
3. Select the issuing organization from the **Issued By** drop-down list.
4. *Optional*: If you are issuing on behalf of another organization, select the organization in the **Issued For** drop-down list. To see more options, click **See All**.
5. From the **Main Commodity** drop-down list, select the appropriate commodity at the appropriate tier, based on the purchase.

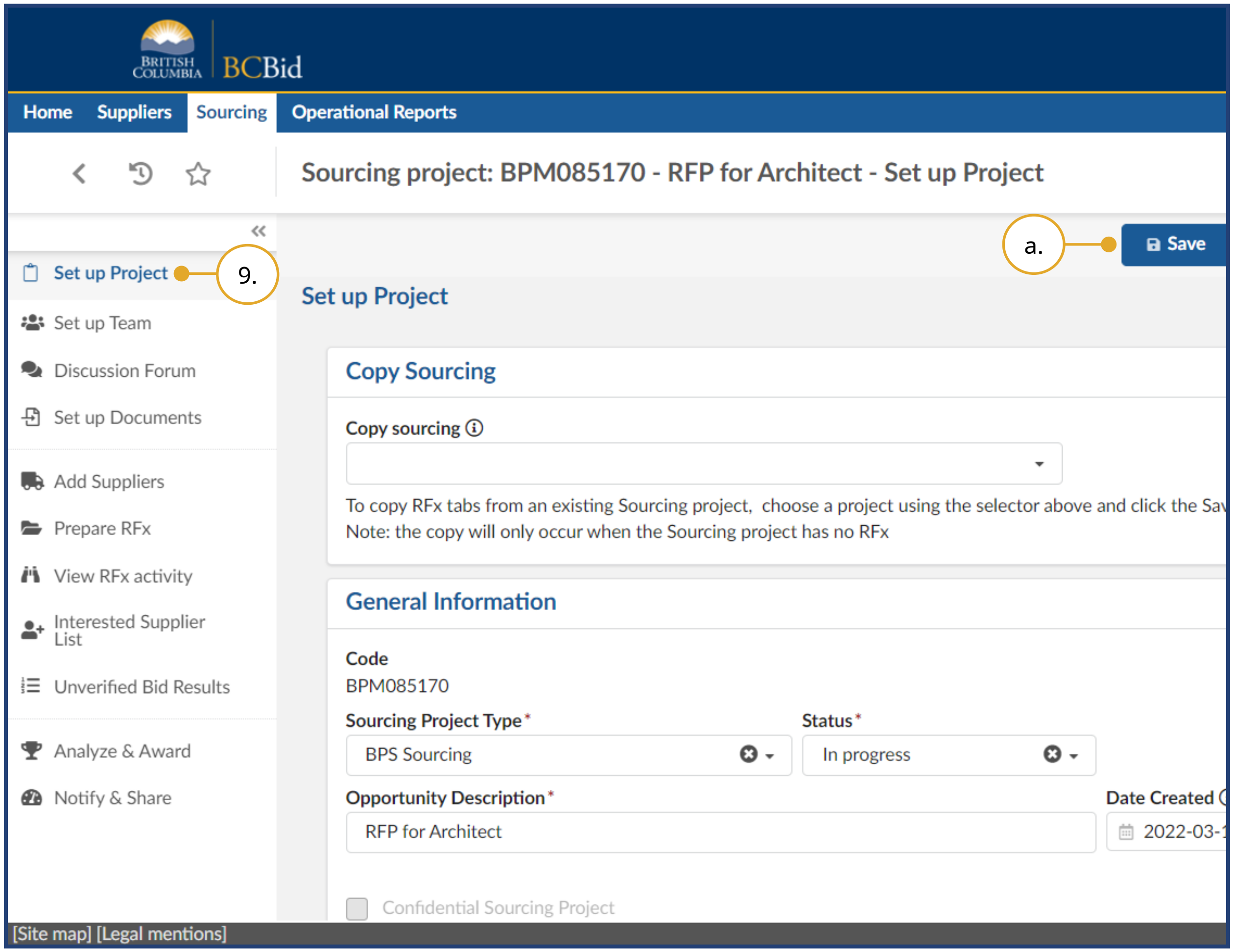
[Commodity Codes]

To issue a **Confidential Sourcing Project**, contact an Administrator to set it up. The character limit for the **Opportunity Description** text box is 192.



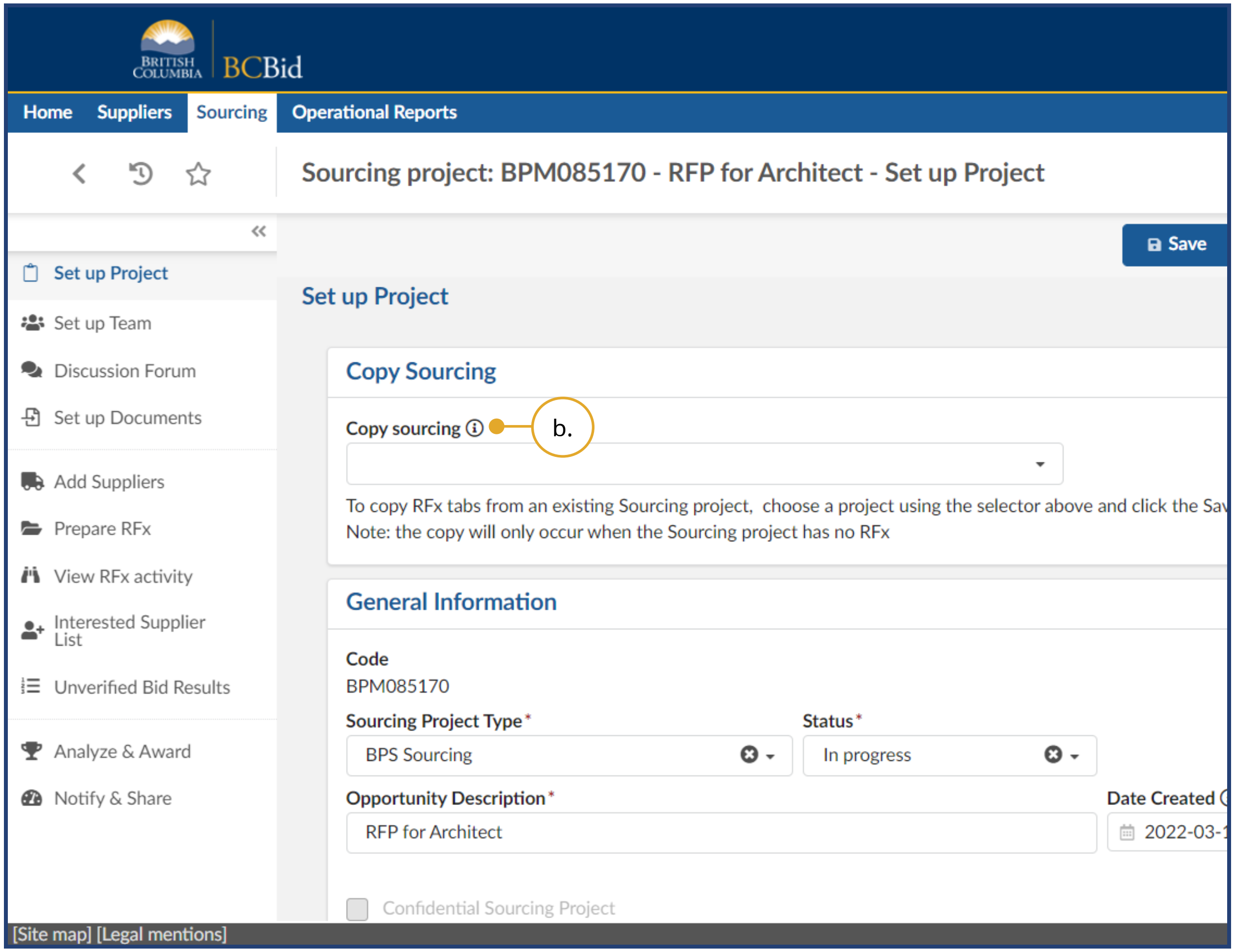
6. *Optional*: Use the **Other Commodities** drop-down list to select the appropriate commodities at the appropriate tier. If a more detailed search is required, select **See All**.
7. *Optional*: Select a **Program** from the drop-down list to link it to the opportunity. See Programs for additional information.
8. Click **Save**.

Set up Project



9. In the **Set up Project** menu, review the information entered after selecting Create Sourcing Project and make changes, if necessary.
   a. Click **Save**.

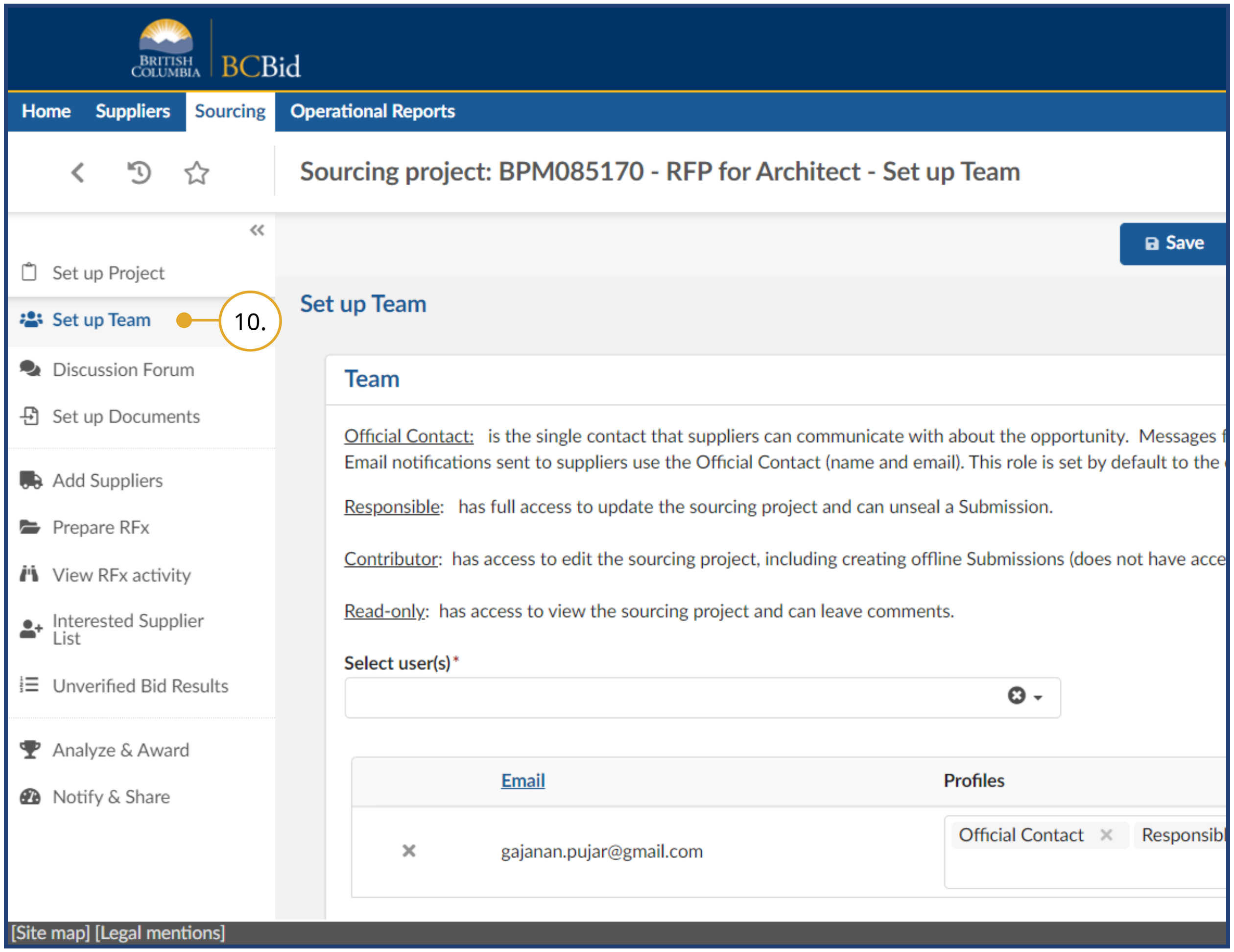
Copy Sourcing



b. *Optional*: To copy RFx tabs from an existing Sourcing Project, select the appropriate Sourcing Project from the **Copy sourcing** drop-down. This may not be applicable to all users.

[Copy Sourcing & Status]

Set up Team



10. In the left-hand menu click **Set up Team**.

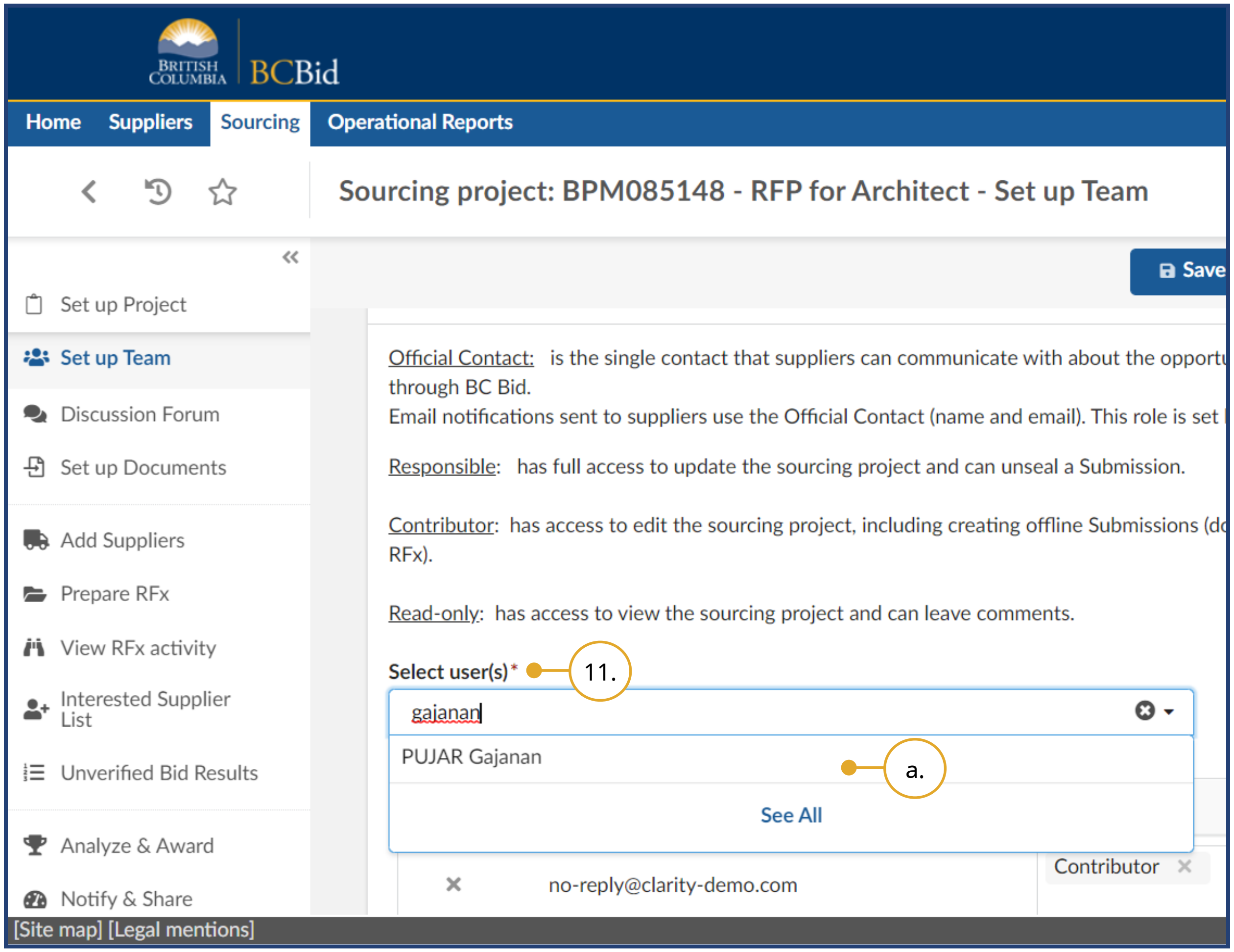
    Set up Team is used to add users and assign Official Contact, Contributor, Responsible, or Read-only roles for the project. Assigning users to a team can only be done by the user with the Responsible role.
    The creator of the sourcing project is assigned the Official Contact and Responsible roles by default.

    There can only be one Responsible profile and one Official Contact profile assigned. The Official Contact does not have to be the same user as the Responsible profile.

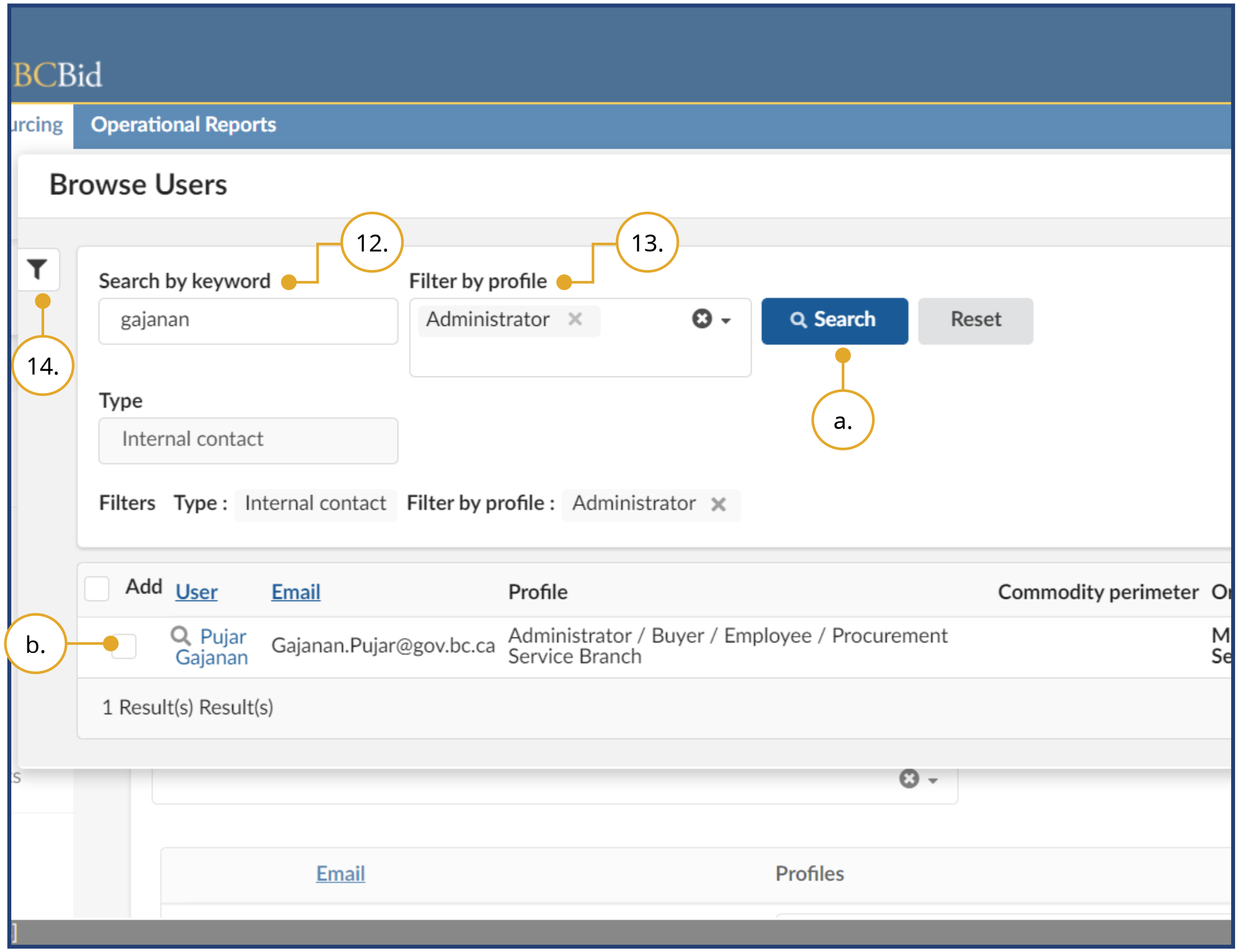
    Set up Team

Adding Users

There are several ways to search for users to add them to a sourcing team.

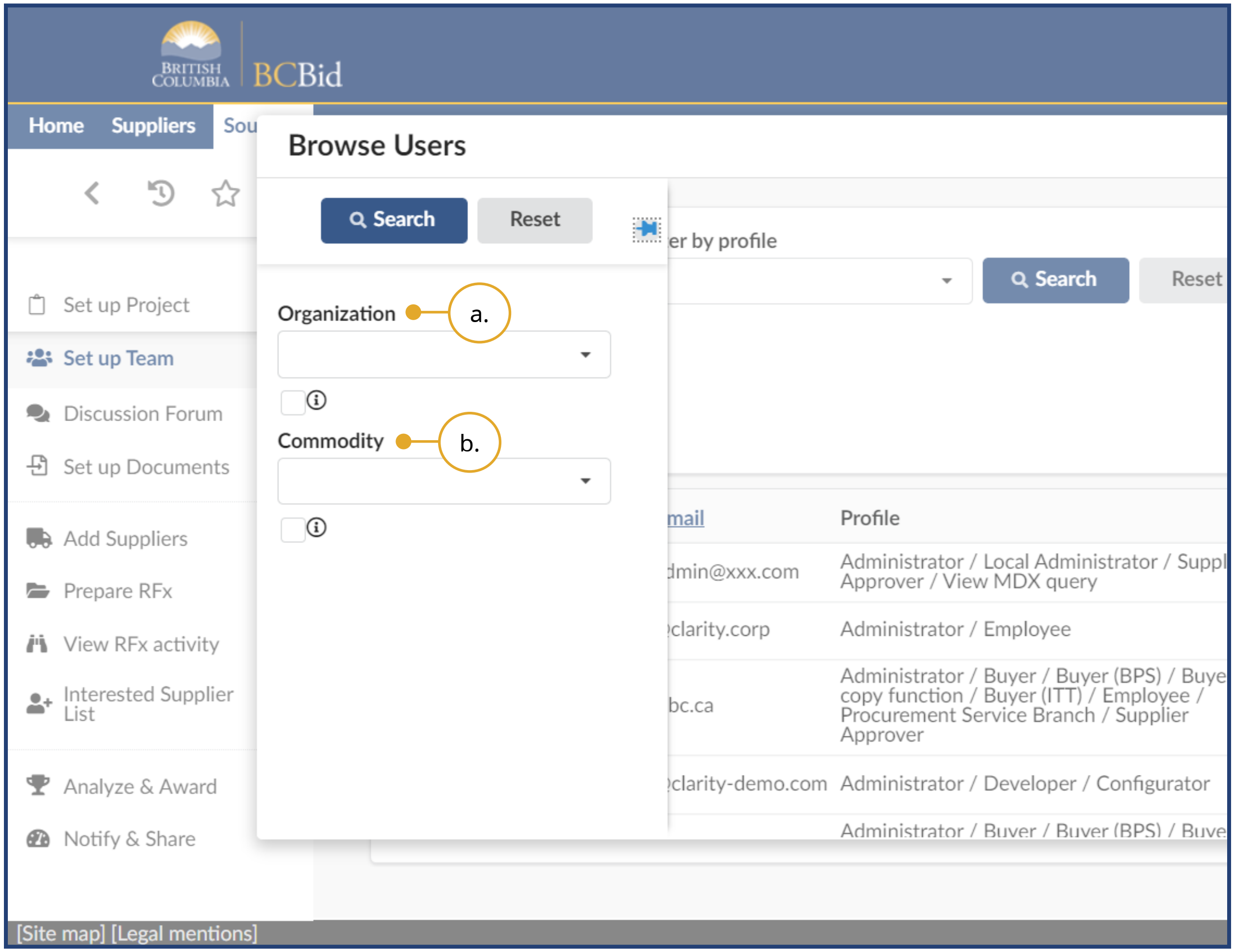


11. In the **Select user(s)** drop-down list, enter the user name and select the user to add to the team. Then click **Save**.
   a. If unable to narrow the options sufficiently, click **See All**. This will open the Browse Users dialog box.



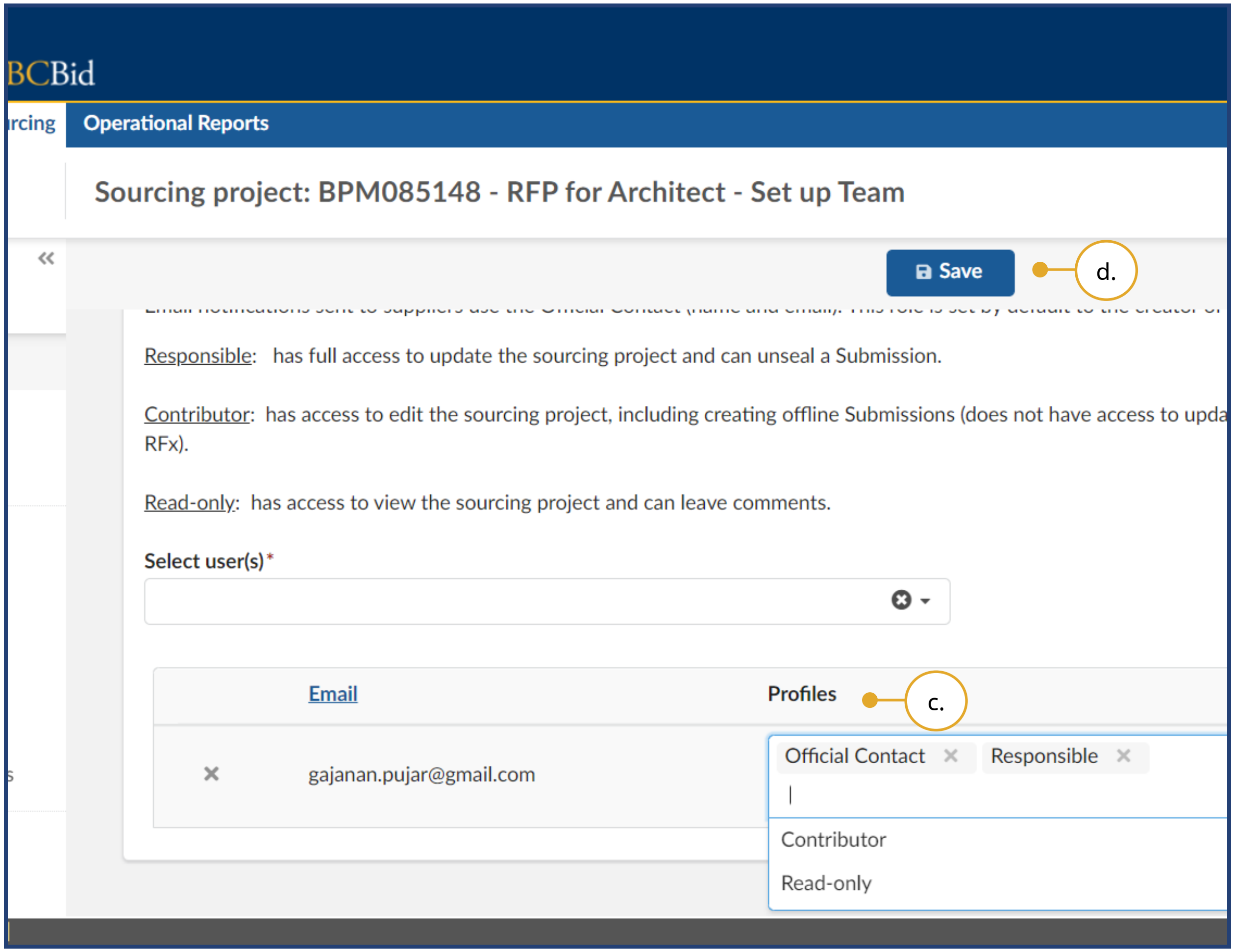
12. The Browse Users dialog box has more details available on the users in case of multiple users sharing the same name. Enter keywords in **Search by keyword** to filter users by name.
   a. Click **Search**.
   b. Select the user in the Add column, close the dialog box and then click **Save**.
13. In the Browse Users dialog box select the **Filter by profile** drop-down list to filter users by the user role assigned.
   a. Click **Search**.
   b. Select the user, close the dialog box and then click **Save**.

   Note: The filter is applicable to internal profiles (i.e. not a Supplier) only. To view user information, select the user's name.
14. In the Browse Users dialog box click the **filter** icon to open the advanced filter.



a. Click the **Organization** drop-down list to filter users by organization, then click **Search** and select the user. Close the dialog box and click **Save**.
b. Click the **Commodity** drop-down list to filter users by commodity, then click **Search** and select the user. Close the dialog box and click **Save**.

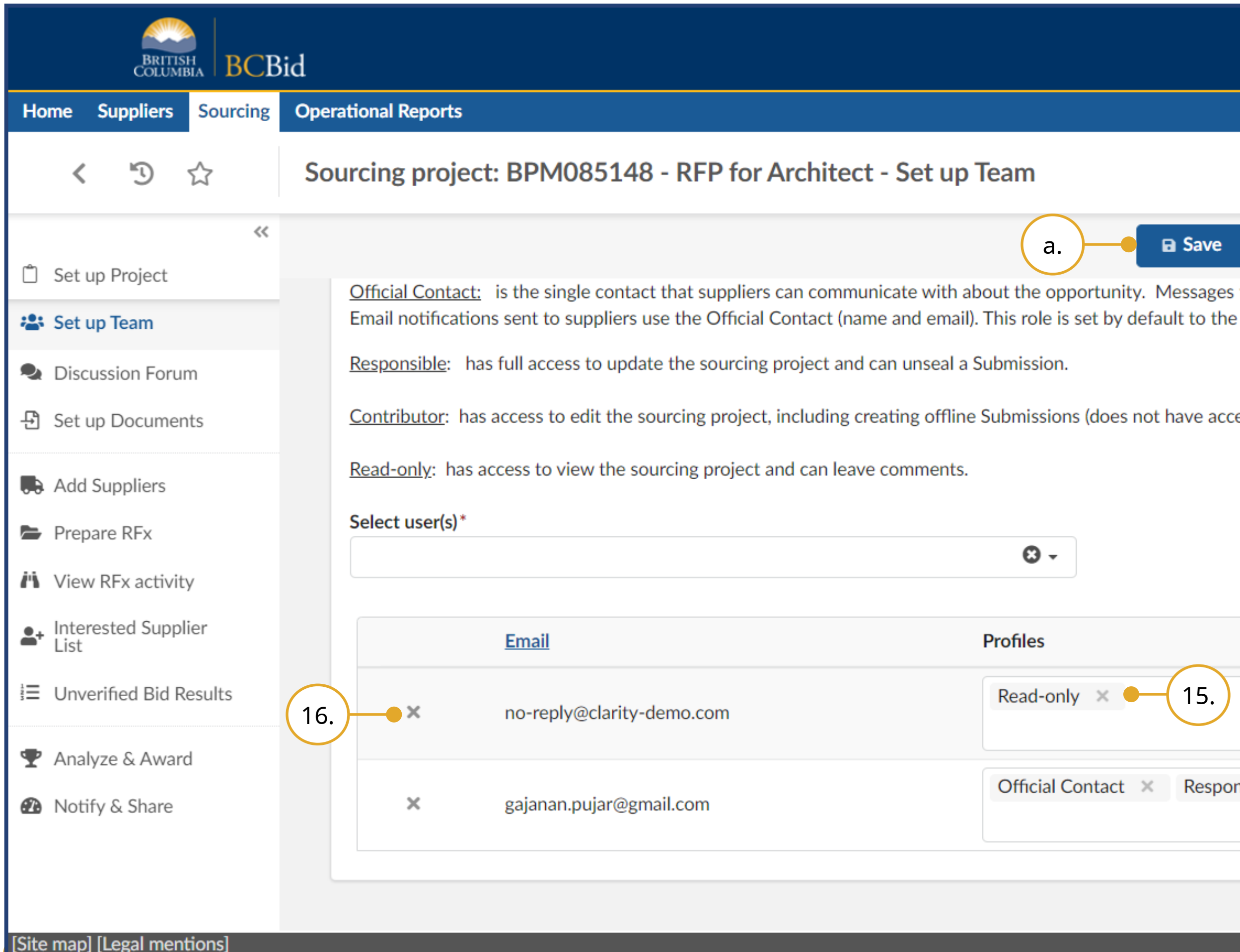
If a user cannot be found, they may not be registered in the BC Bid application.



c. Use the **Profiles** drop-down list to select a profile for the added user.
d. Click **Save**.

Removing Users and Profiles

To remove a user and profile, follow these steps:



15. Click the **X** beside a profile to remove that profile for that specific user.
16. Click the **X** beside a contact email to remove that user from the team.

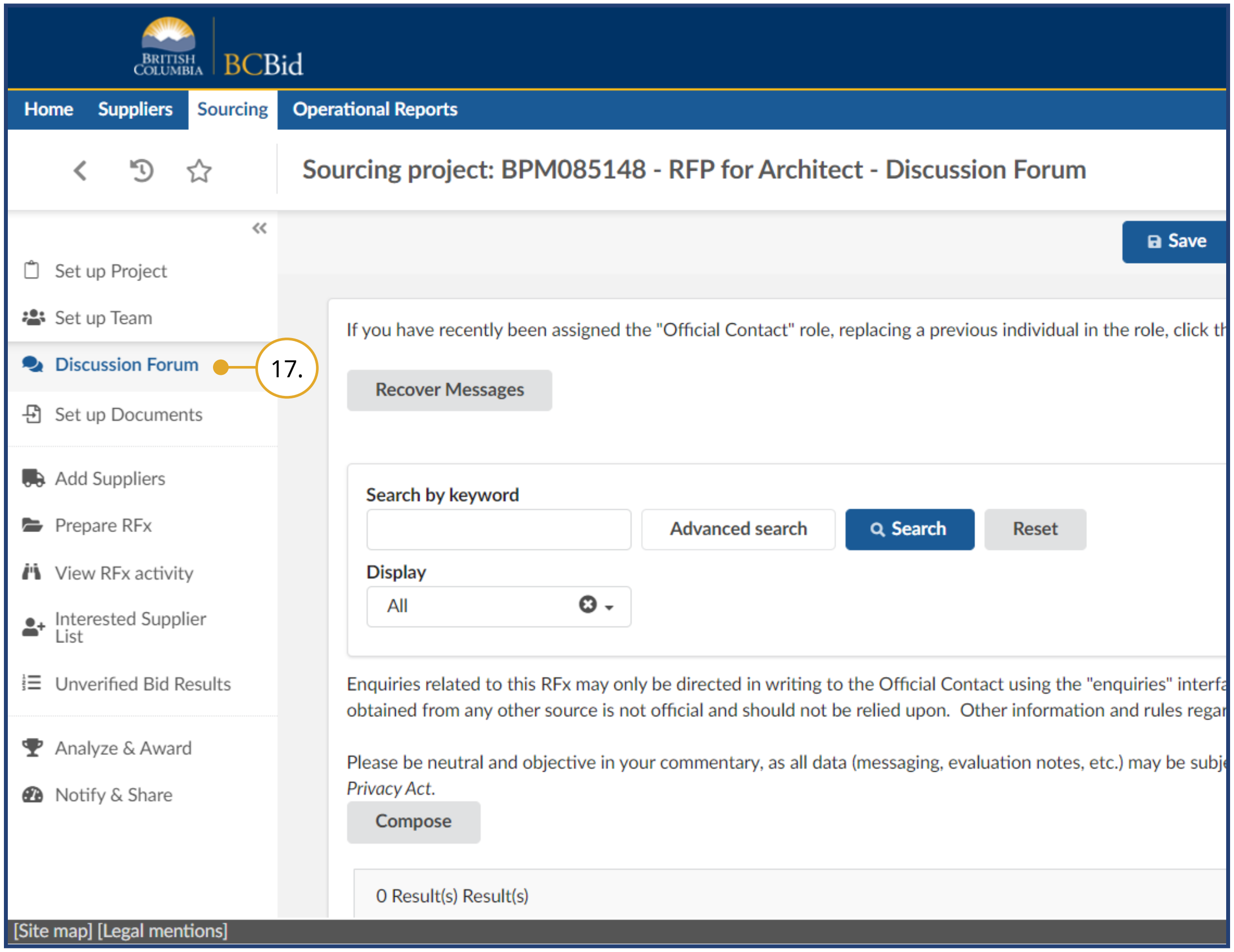
a. Click **Save**.

Note: If you click the **X** in the Select user(s) drop-down, the entire team is removed.
Before reassigning the Responsible role to another user, to ensure you don't lose access to the Sourcing Project, assign an alternate role to yourself.

To reassign the Responsible role to a new user in an event where the current person acting in that role is no longer available to reassign the role themselves, someone from your organization should contact the BC Bid Help Desk for assistance.

Discussion Forum

The Discussion Forum is used for external communication between Buyers and Suppliers and internal communication between sourcing team members.



17. *Optional*: In the left-hand menu click **Discussion Forum**.

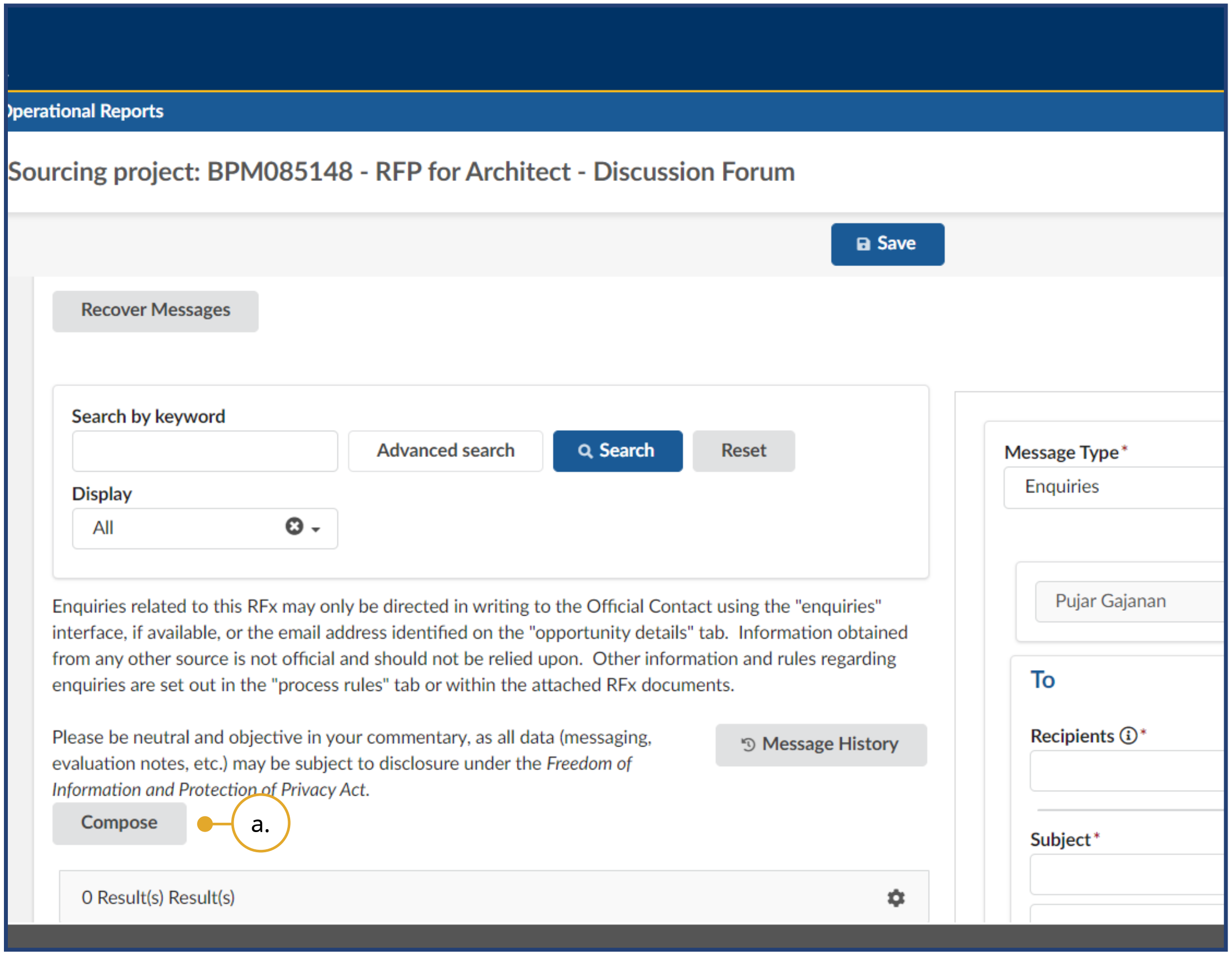
    This menu allows Sourcing Project teams to keep relevant collaborative discussions in one place for records management.

    Users can write messages and attach documents.

    Suppliers can submit enquiries and Official Contact can provide answers to all Suppliers, creating an Addendum.

    How to use Discussion Forum

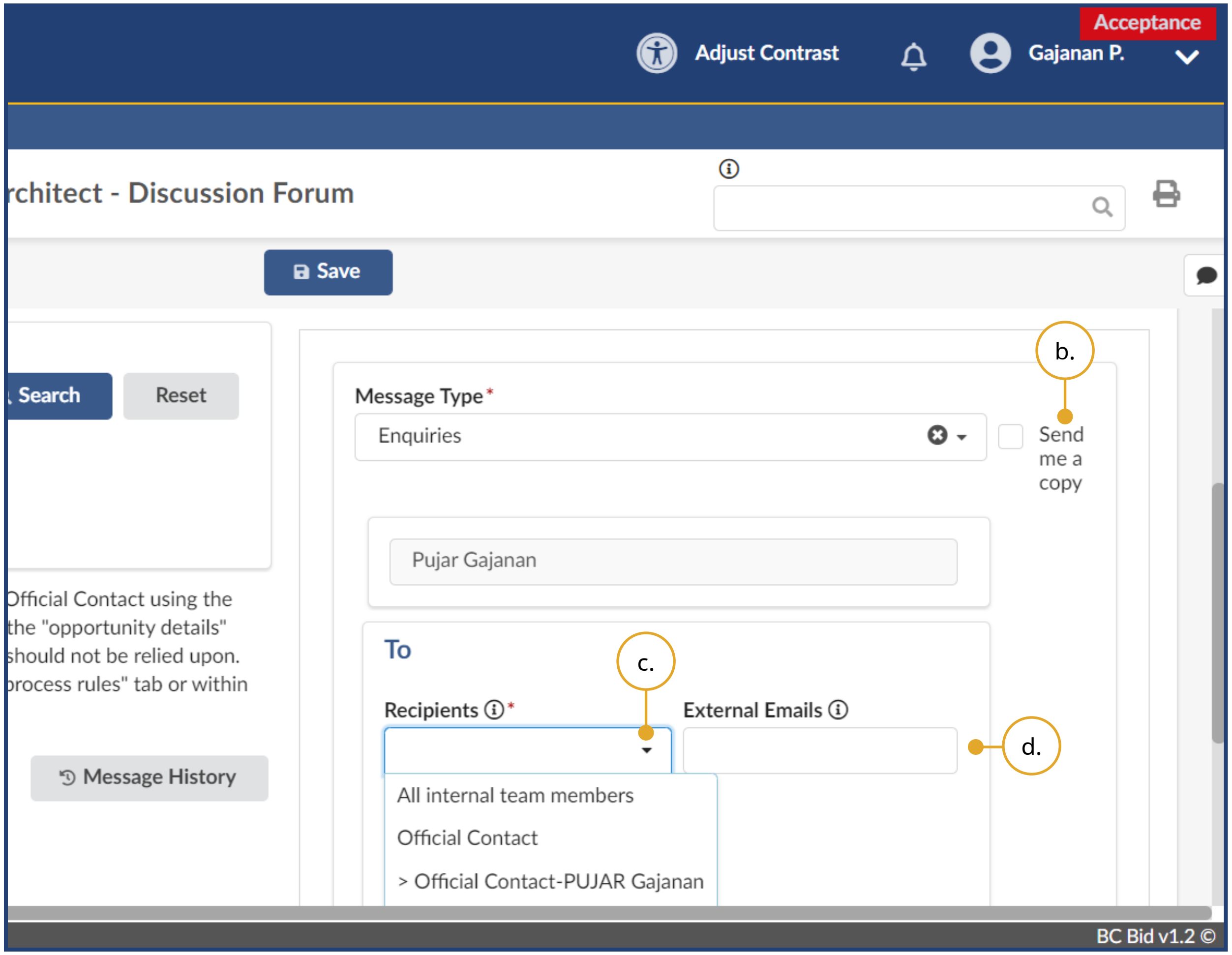
Creating a New Message



a. Click **Compose**.

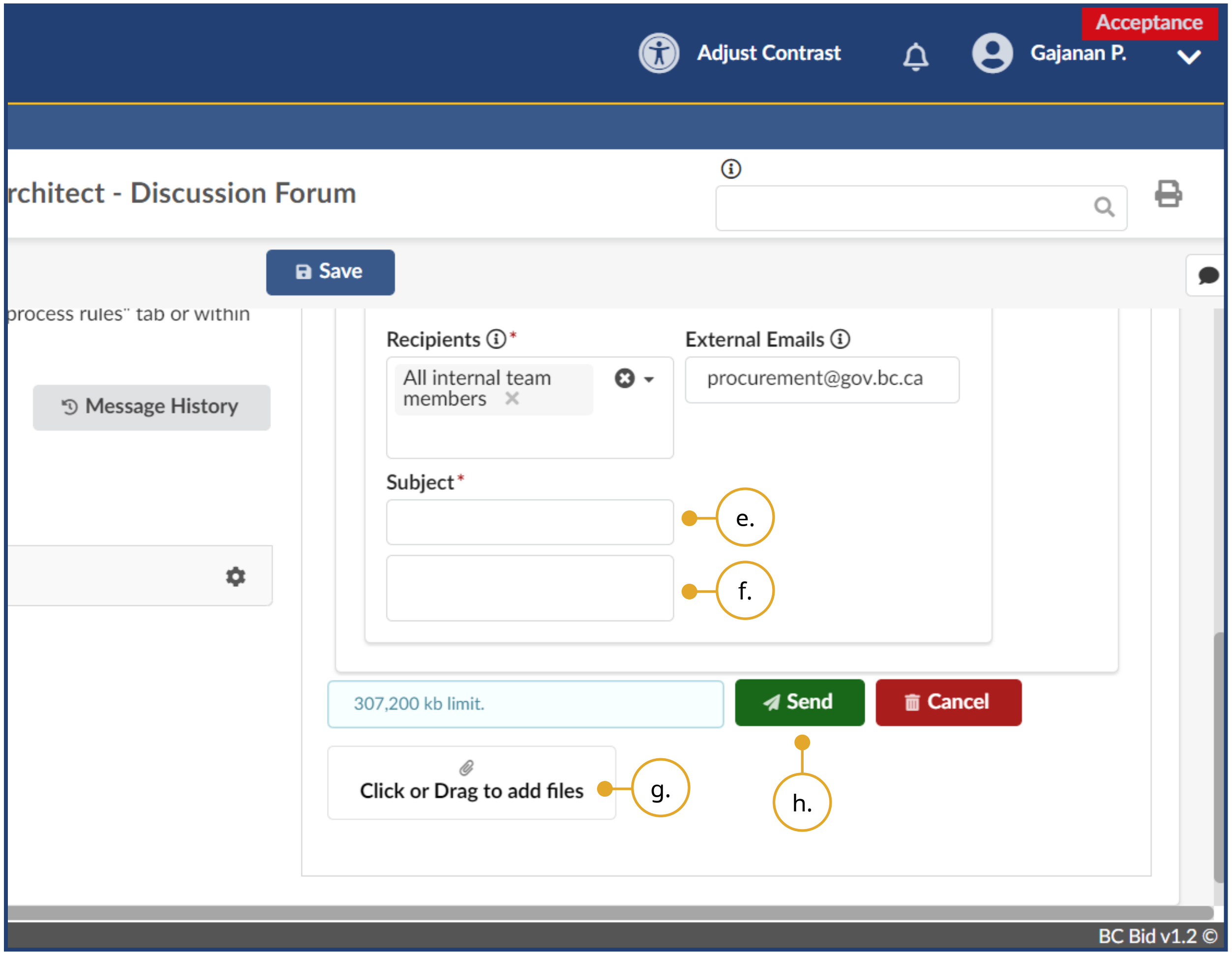
   A message field will display on the right of the window. By default, the message type is Enquiries.

   Note: By clicking the **Recover Messages** button, any new Official Contact will have access to all communications sent to the previous Official Contact.



b. *Optional*: Select the **Send me a copy** checkbox to receive a copy of the email.
c. In the To section, select the recipients using the **Recipients** drop-down list. Selectable recipients include: sourcing project team members and Suppliers added in the Add Suppliers menu. Recipients are grouped by role.

d. You can send your message to an external email addresses by entering the addresses (separated by semi-colons) in the **External Emails** text box. They will not be able to see or open any attachments through their email. They will have to use the Public Portal/Supplier dashboard to access the documents. Only registered users will have access to the attachments in non-public events.



e. Enter the **Subject** in the following format: [Opportunity ID, Opportunity description].

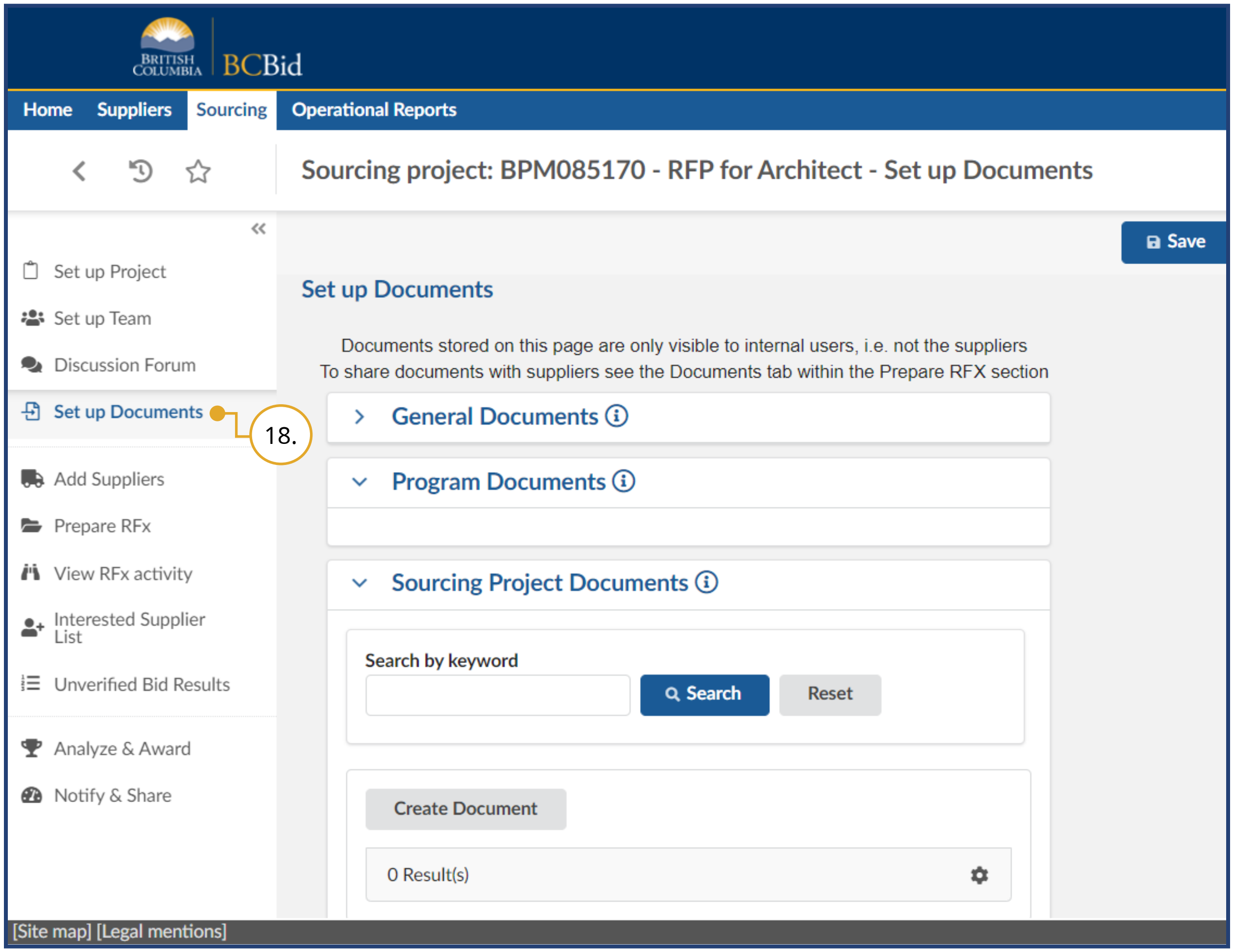
f. In the text box below, enter your message.

g. Add attachments to your message by clicking **Click or Drag to add files** or directly dragging and dropping a file onto the button.

h. Once your message is ready, click **Send**.
Note: You cannot delete a message once it has been sent. Select the **tick** icon to mark a message as replied (applicable to messages received from Suppliers only).

Buyers are encouraged not to use the **External Emails** field. Buyers should encourage Suppliers to register for a BC Bid account. Messages sent through the Discussion Form do not contain attachments. Suppliers and sourcing team members need to log in to the BC Bid application to retrieve attachments.

Set up Documents



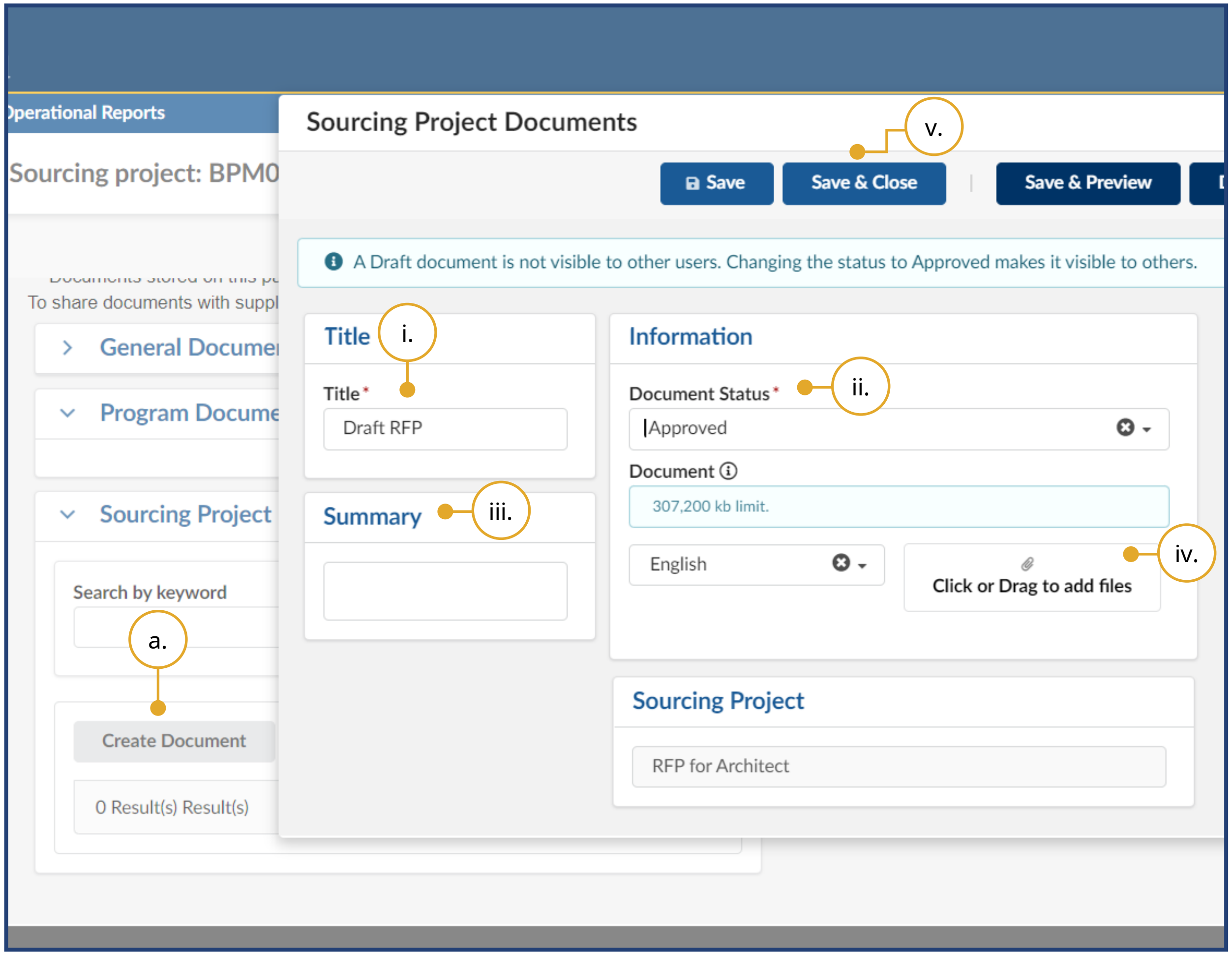
18. *Optional*: In the left-hand menu, click **Set up Documents**.

    This section provides an overview of all the General Documents, Program Documents, and Sourcing Project Documents relevant to the project. Buyers can also upload Sourcing Project Documents.

    Note: General Documents are controlled by Administrator. So, it is not applicable to any user.

    Set up Documents overview

Uploading Documents

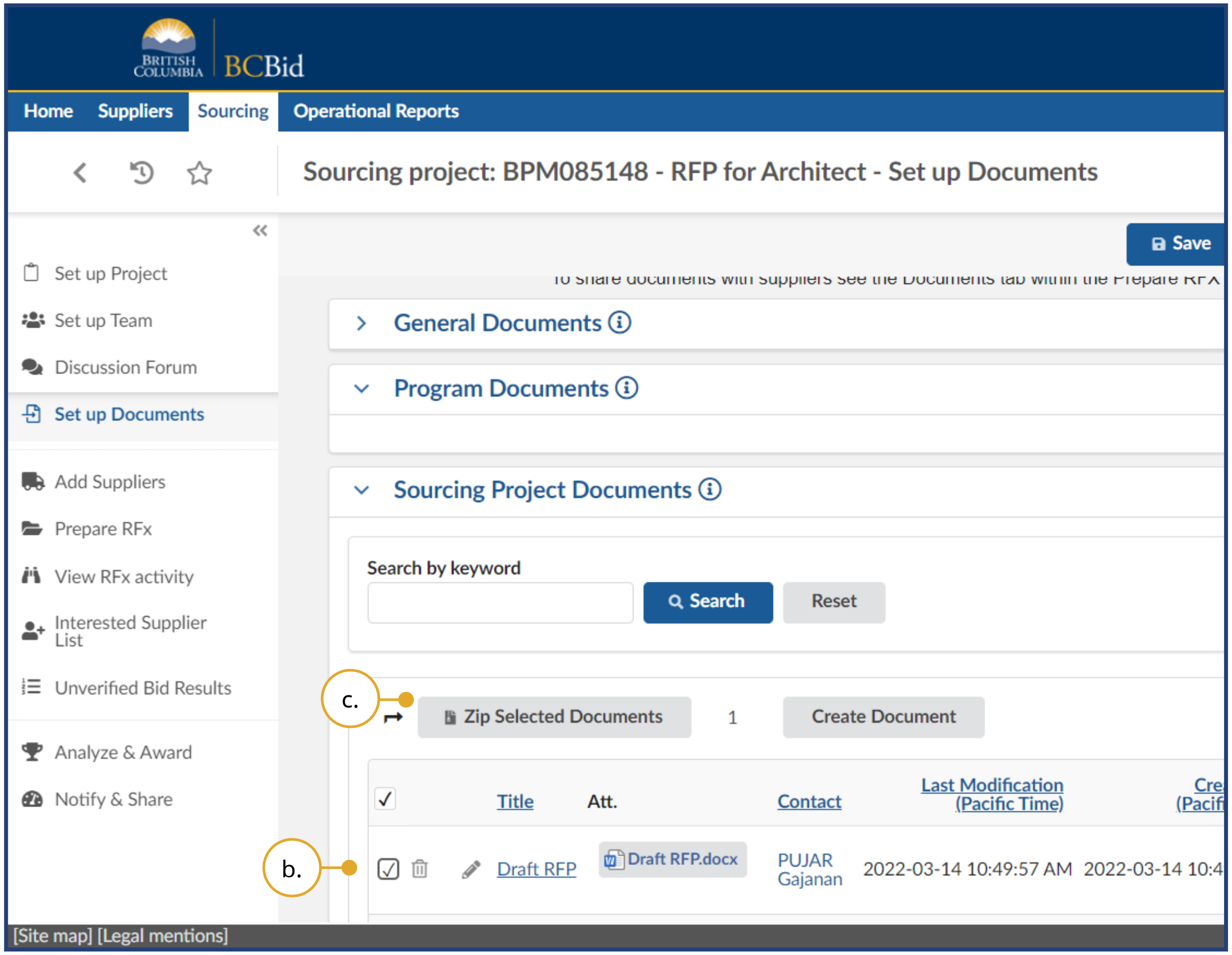


a. Click **Create Document**.
   i. Enter a **Title**.
   ii. Using the **Document Status** drop-down list select **Approved** to make the file visible to Suppliers.
   iii. *Optional:* Enter a **Summary**.
   iv. To upload files, click **Click or Drag to add files** or drag and drop files on top of the button.
   v. Click **Save & Close**.

Note: Although multiple documents can be uploaded at once, this isn't recommended as those documents cannot be sorted. Sorting is based on the value in the Title text box, not the actual document names.

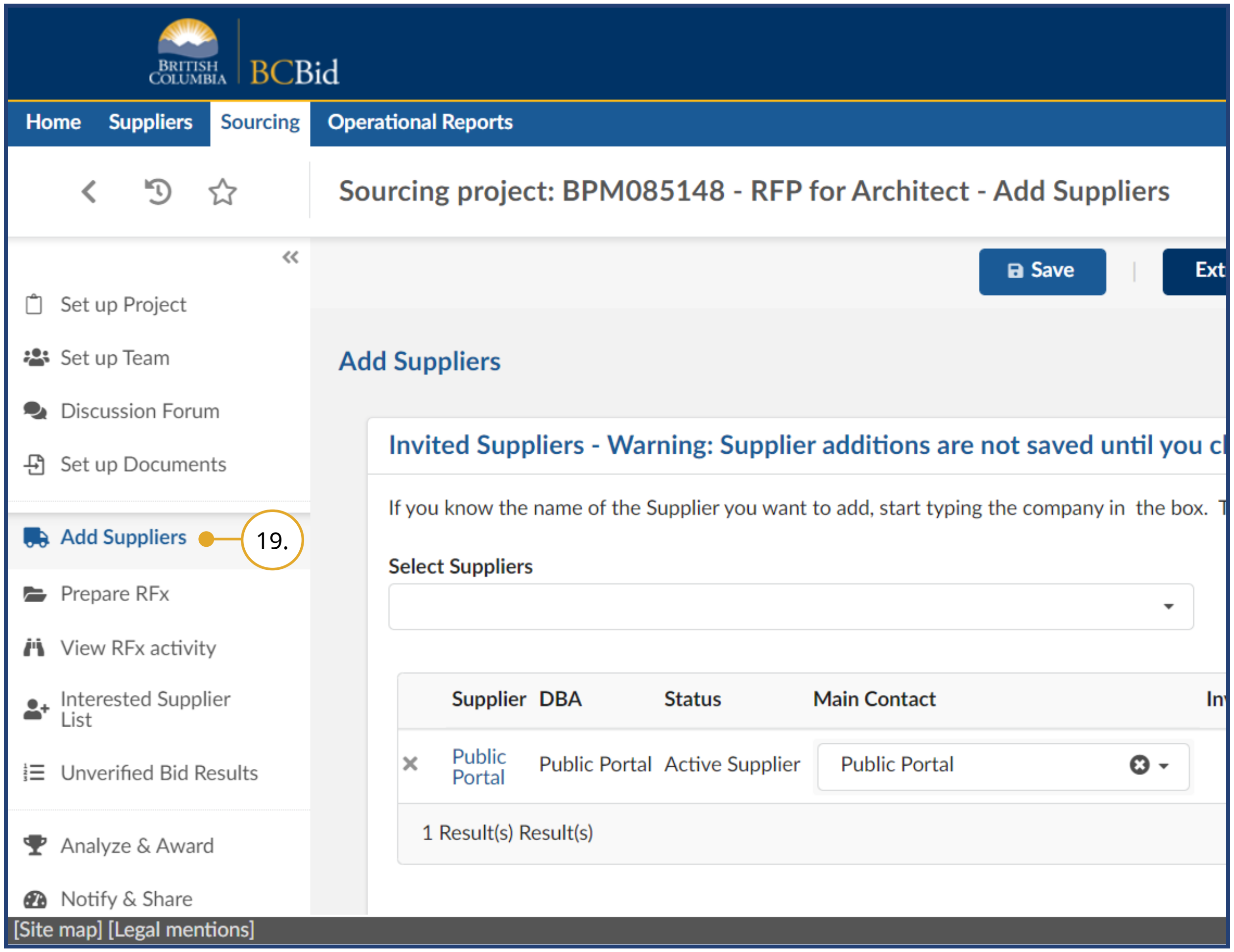
Read-only profiles can only see approved documents. Contributor roles can see and edit all approved documents and can only see and edit draft documents created by themselves

Downloading Existing Documents



b. Select the **Checkbox** next to the document(s) to be downloaded.
c. Click **Zip Selected Documents** to download the document(s).

Add Suppliers

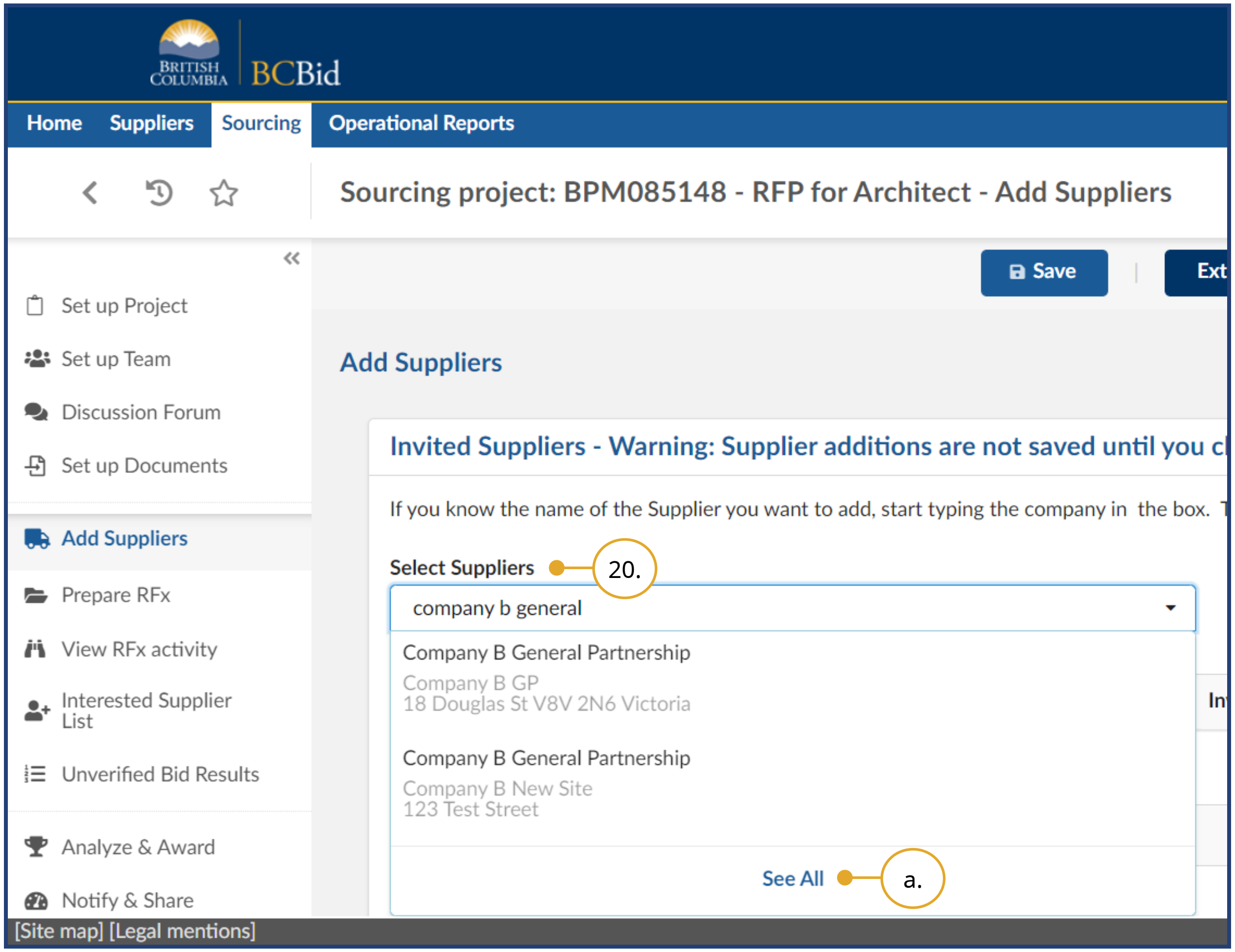


19. *Optional*: In the left-hand menu, click **Add Suppliers** to create a list of invited Suppliers.
    The Add Suppliers menu can be used to:
    - invite a list of potential Suppliers to participate in a specific opportunity, and
    - add Suppliers for uploading Submissions not submitted through the BC Bid application.

    Add Suppliers shows Public Portal by default. This is required to be present for all publicly issued opportunities but should be removed from an invite-only opportunity.
    The main contact identified in the Supplier's profile will receive notifications when the Supplier is invited to participate in an opportunity.

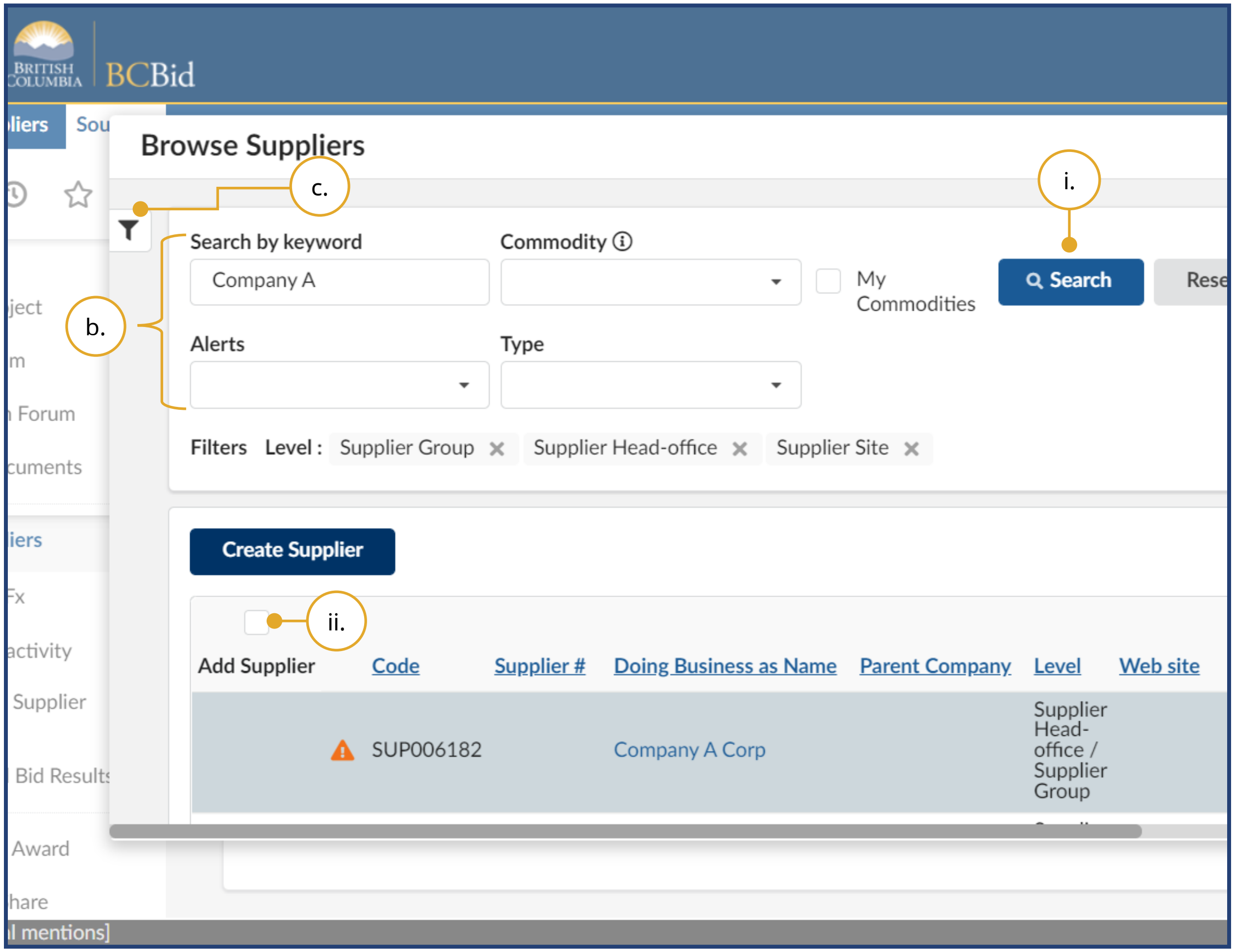
    Add Suppliers Overview

Adding Suppliers



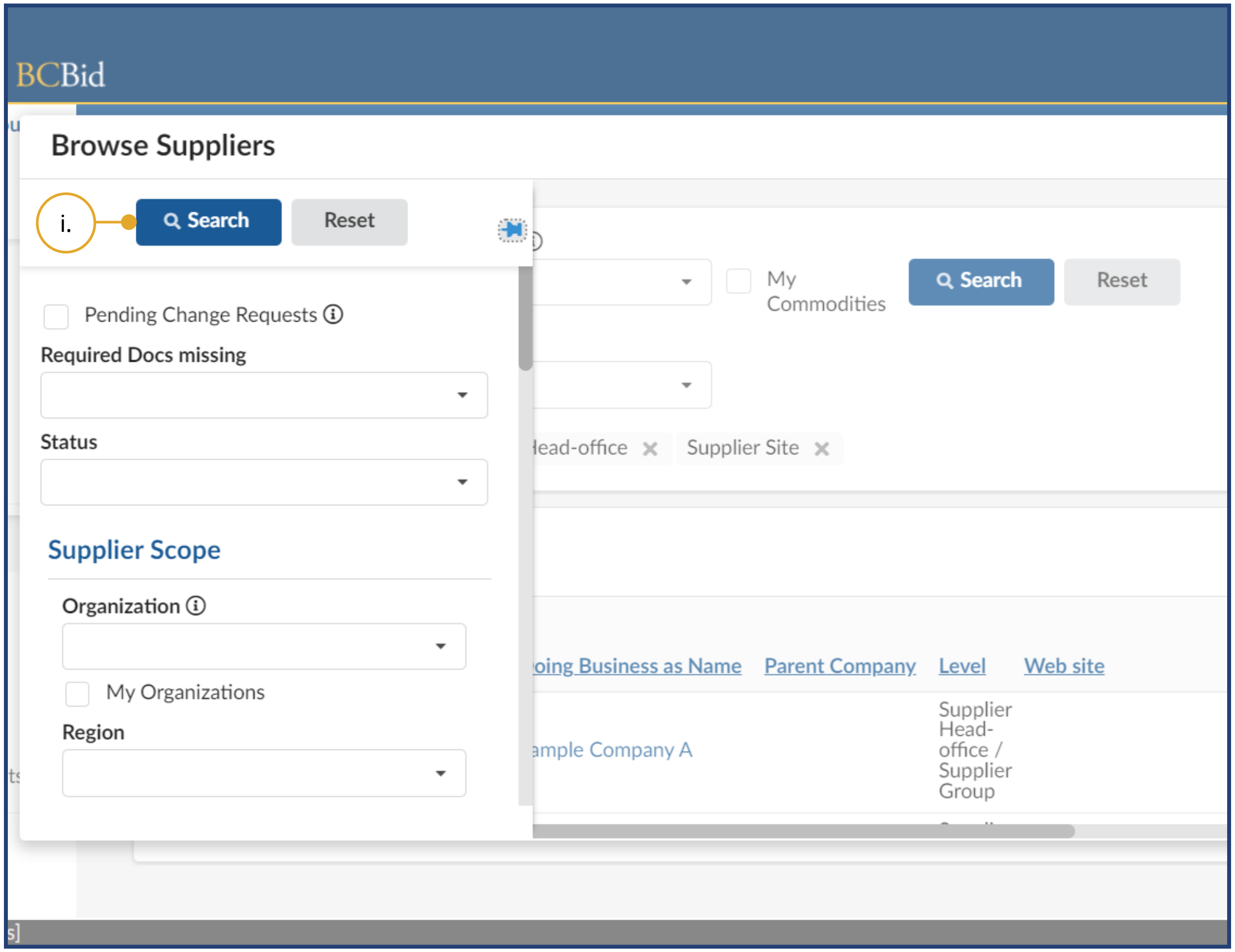
20. In the **Select Suppliers** drop-down list, enter the name of the Supplier and select the Supplier. Then click **Save**.
   a. If unable to narrow the options sufficiently, click **See All** to make a more detailed search. This will open the Browse Suppliers dialog box.

   NOTE: In the **Select Suppliers** drop-down you will be able to identify Shell Suppliers as they will be marked with **[SHELL (Unregistered) Supplier]** to the right of the supplier name.



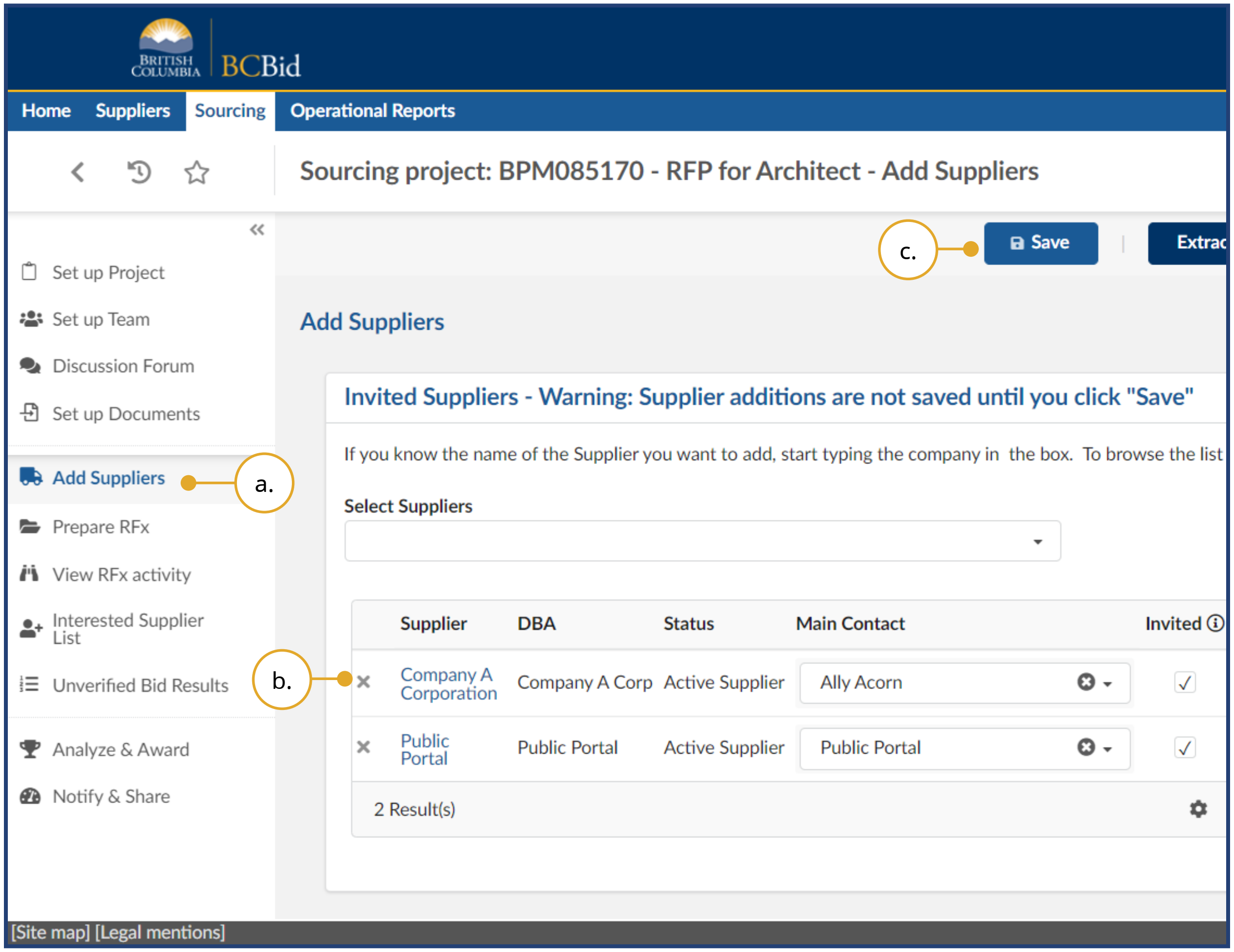
b. In the Browse Suppliers dialog box, search for the Supplier by **keyword**, **Alerts**, **Type** or **Commodity**.
   i. Select **Search**.
   ii. Select the Add Supplier checkbox beside the Supplier to be added and close the dialog box. Click **Save**.

c. Click the **filter** icon to open the advanced filter.



i. In the Browse Suppliers sliding menu, use the appropriate drop-down list, checkbox, or text box to filter Suppliers, then click **Search** and add the Supplier. Close the dialog box and click **Save**.

Removing Suppliers



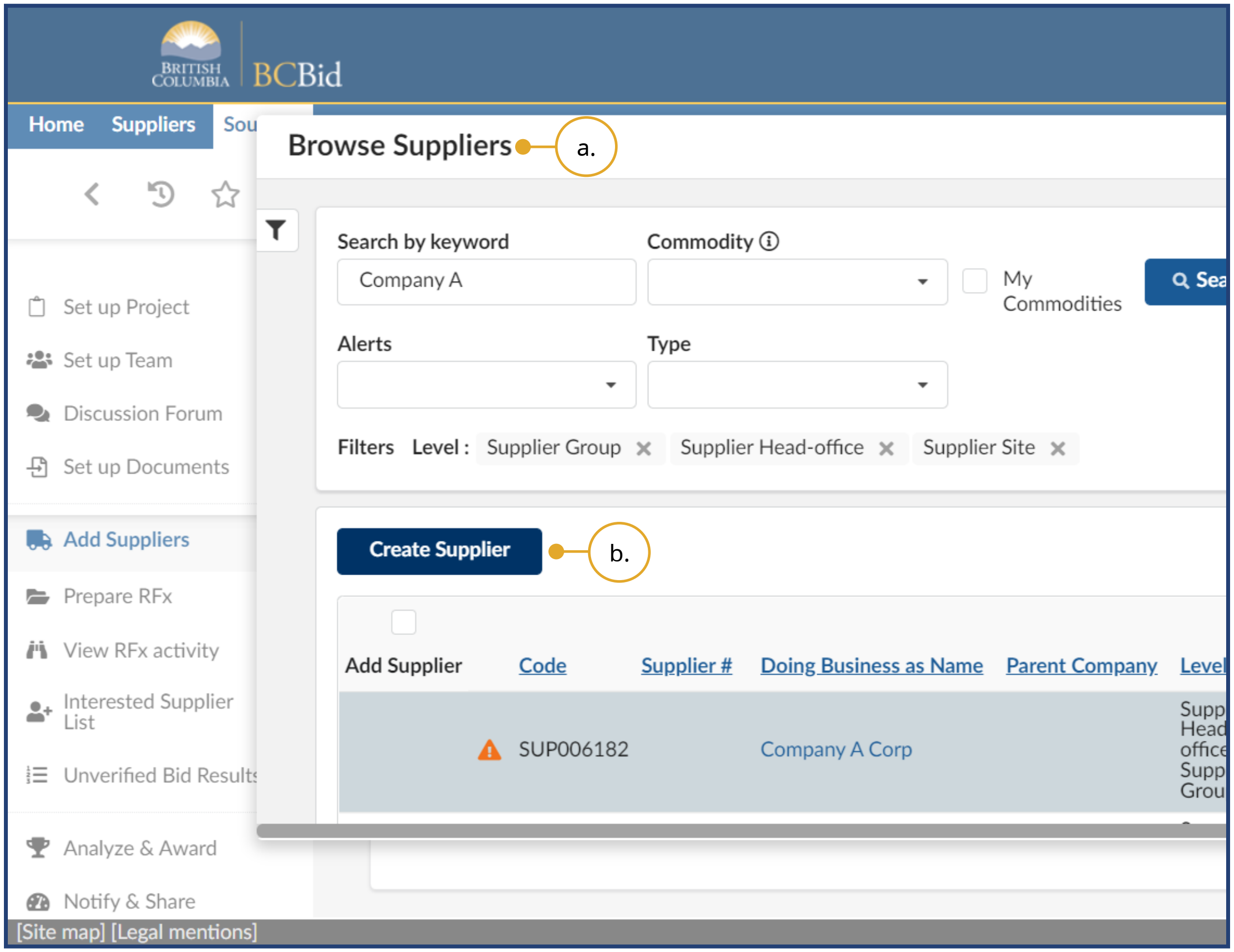
21. To remove a Supplier from an opportunity:
    a. Click **Add Suppliers** in the left-hand menu.
    b. Click the **X** beside the Supplier name.
    c. Click **Save**.

[Removing Suppliers and Extracting Supplier List]

Invited Suppliers cannot be removed after the opportunity is issued.

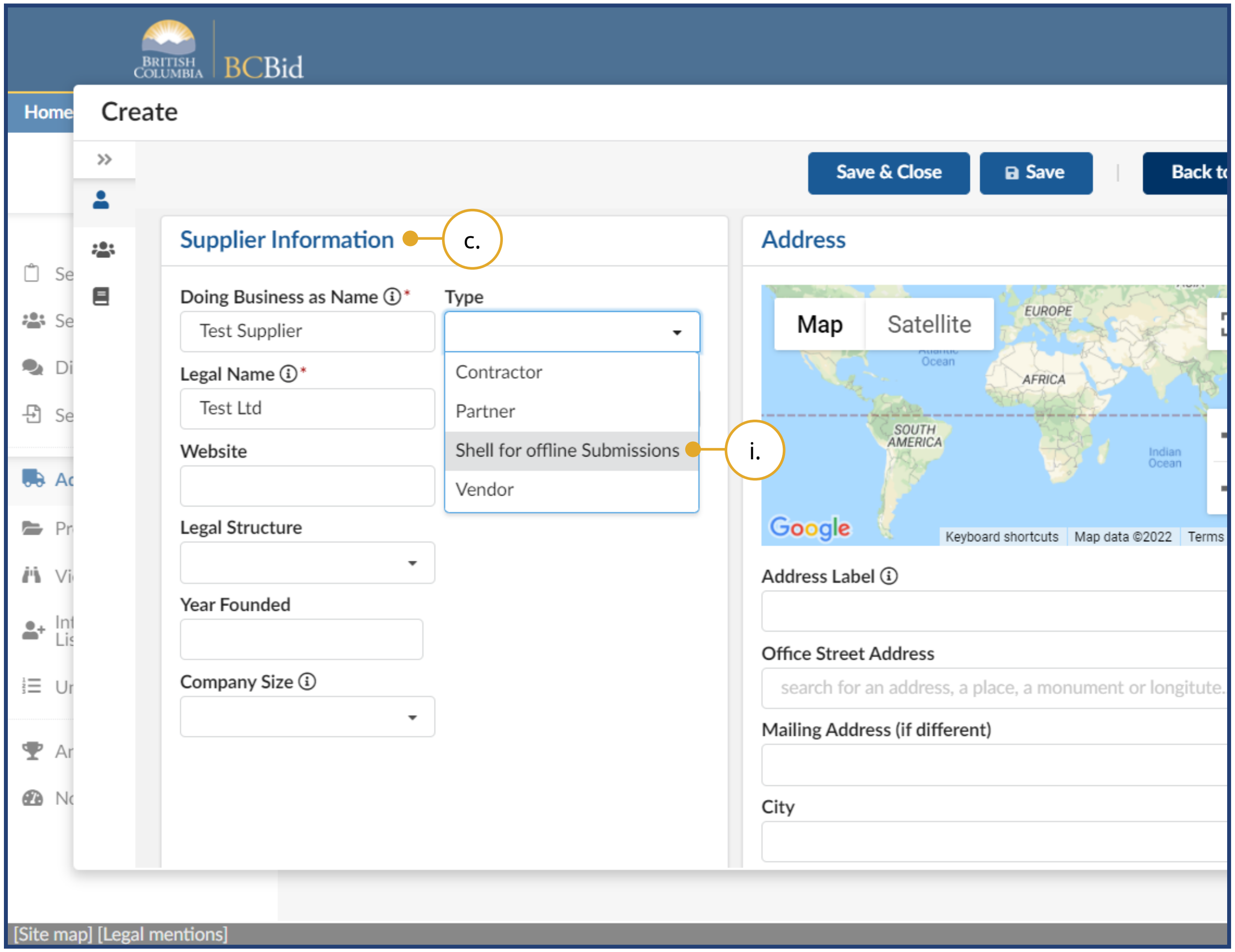
Creating a New Supplier

Creating a new Supplier is used when a Buyer is inviting a Supplier to an opportunity or uploading Submission from a Supplier that is not yet identified in the BC Bid application. Buyers should ensure that the Supplier does not yet exist, prior to creating a new one. If a duplicate is found, contact the BC Bid Help Desk.

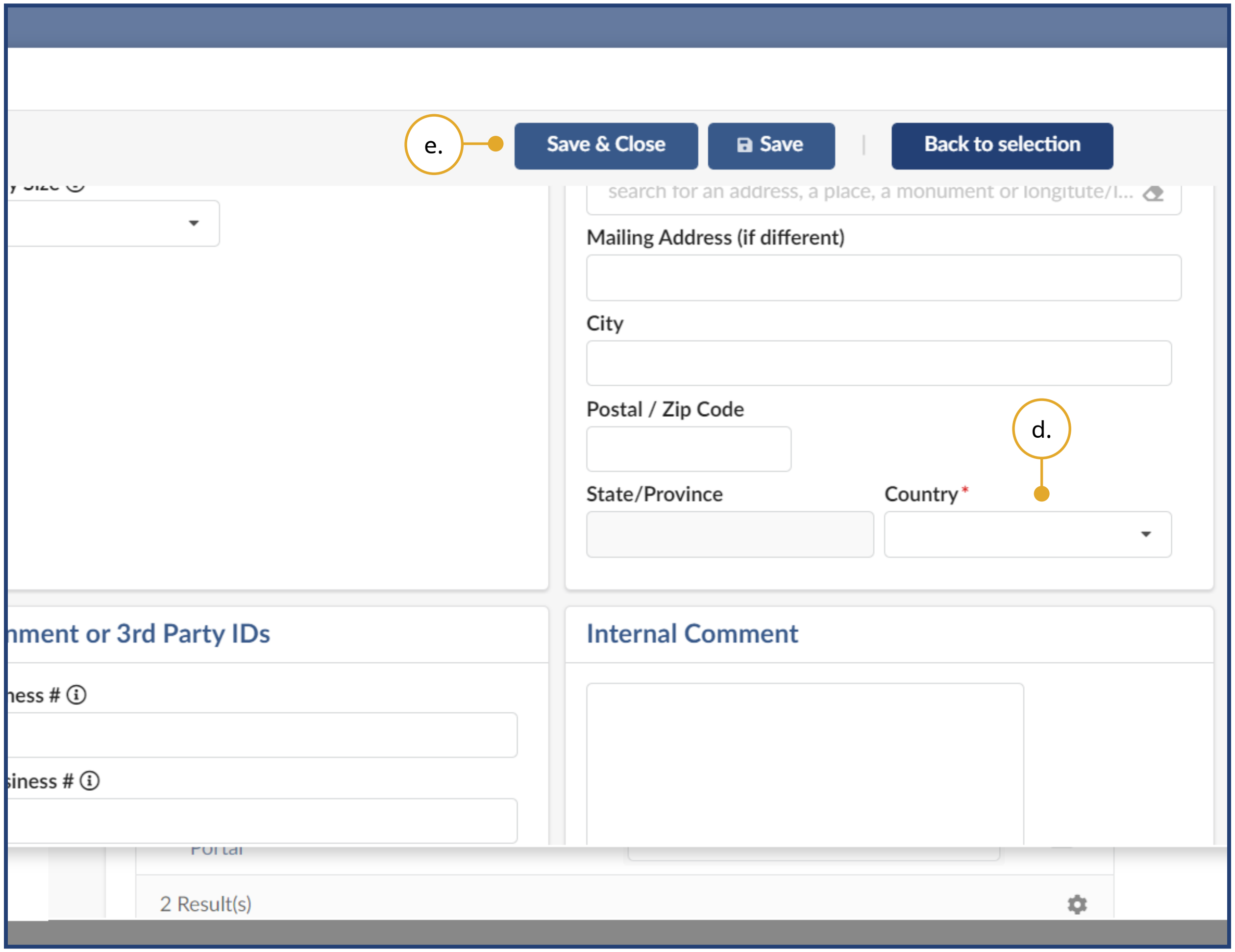


22. To create a Supplier:
    a. From the Add Suppliers menu, open the Browse Suppliers dialog box by clicking **Select Suppliers** then **See All**.
    b. Click **Create Supplier**.

Create a new Supplier

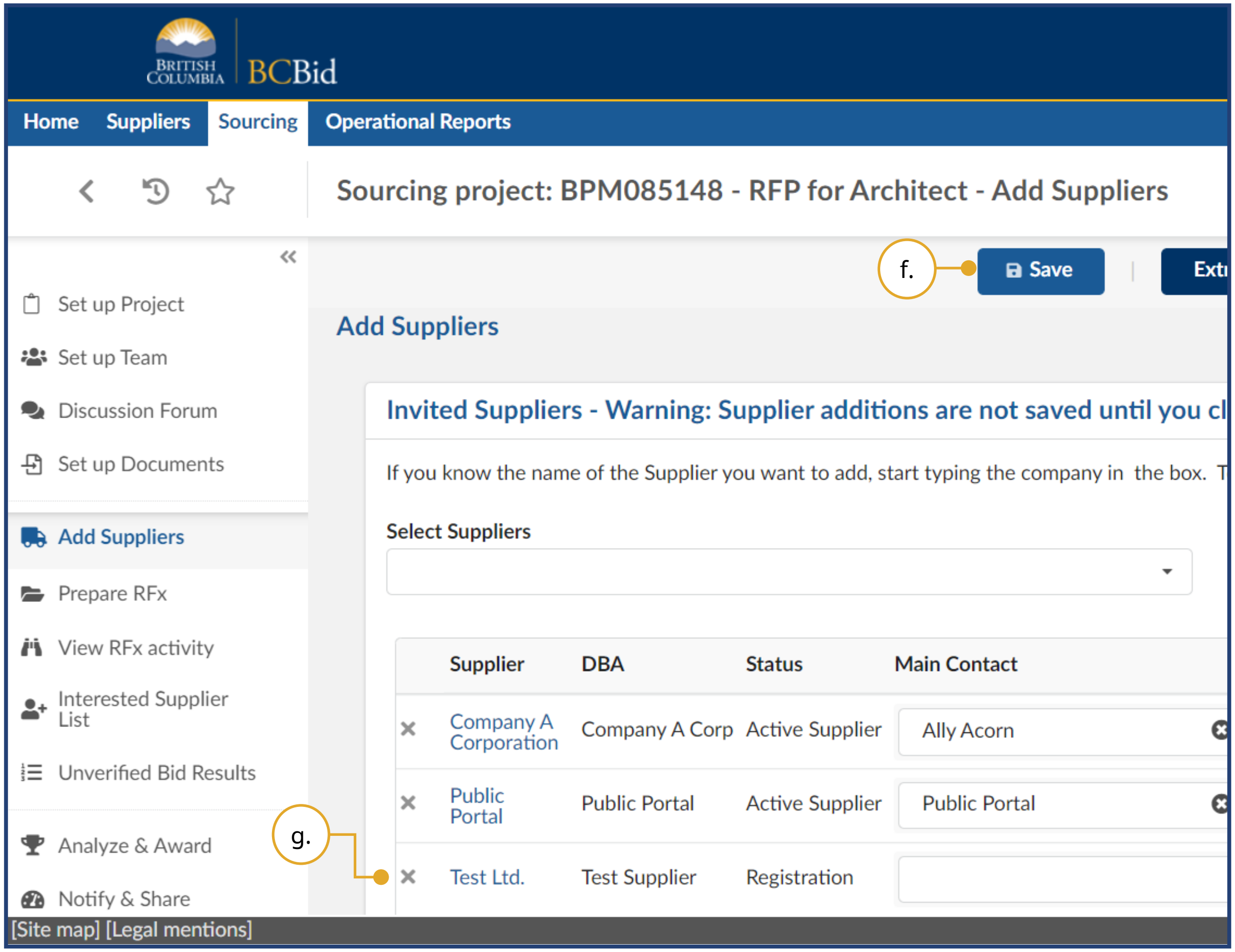


c. In the dialog box, enter the mandatory fields in Supplier Information section.
    i. In the **Type** drop-down list, select **Shell for offline Submissions**.



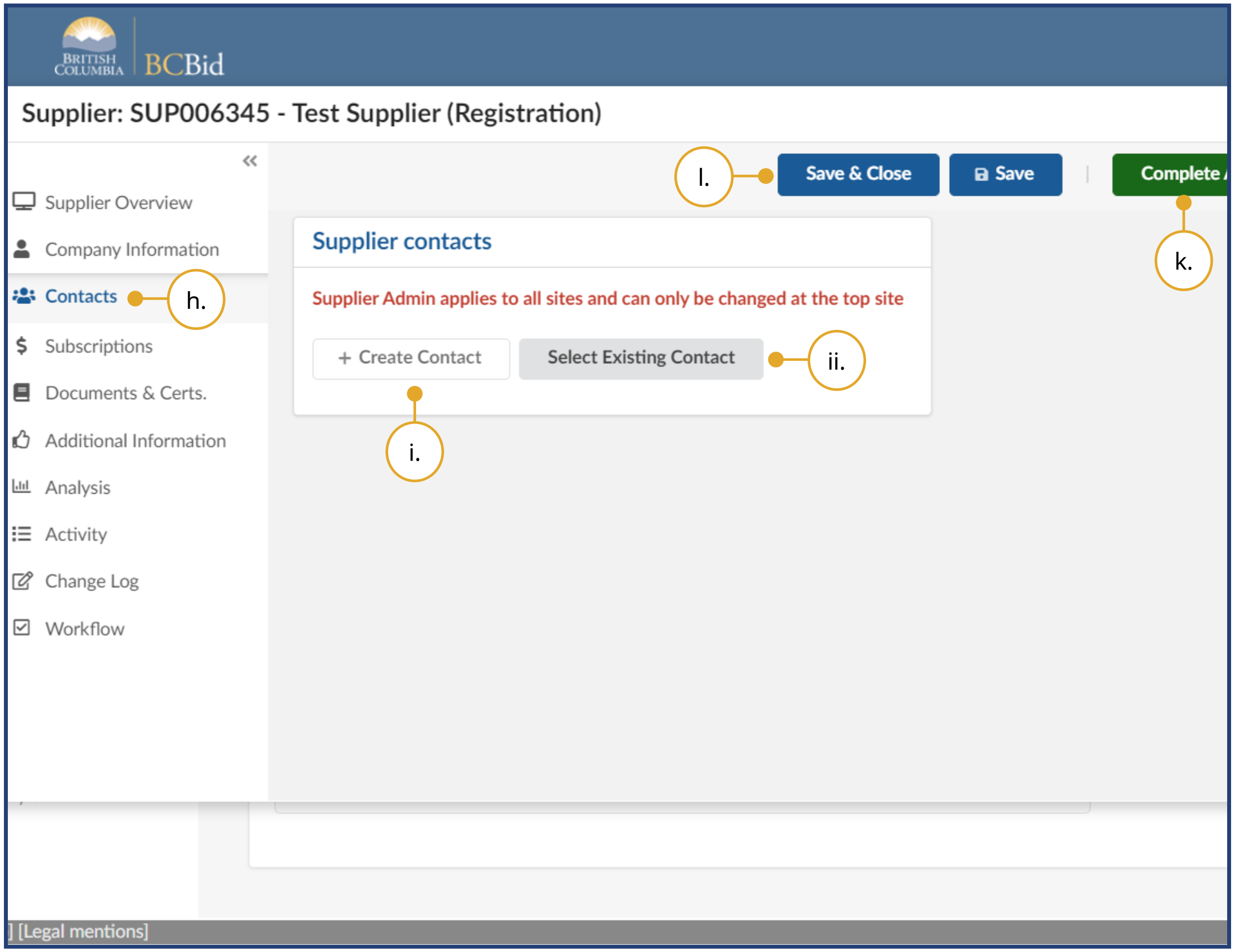
d. In the Address section, select an option from the mandatory **Country** drop-down list.
e. Click **Save & Close**.

Note: The Supplier is automatically added to the Add Suppliers menu.



f. Click **Save**.

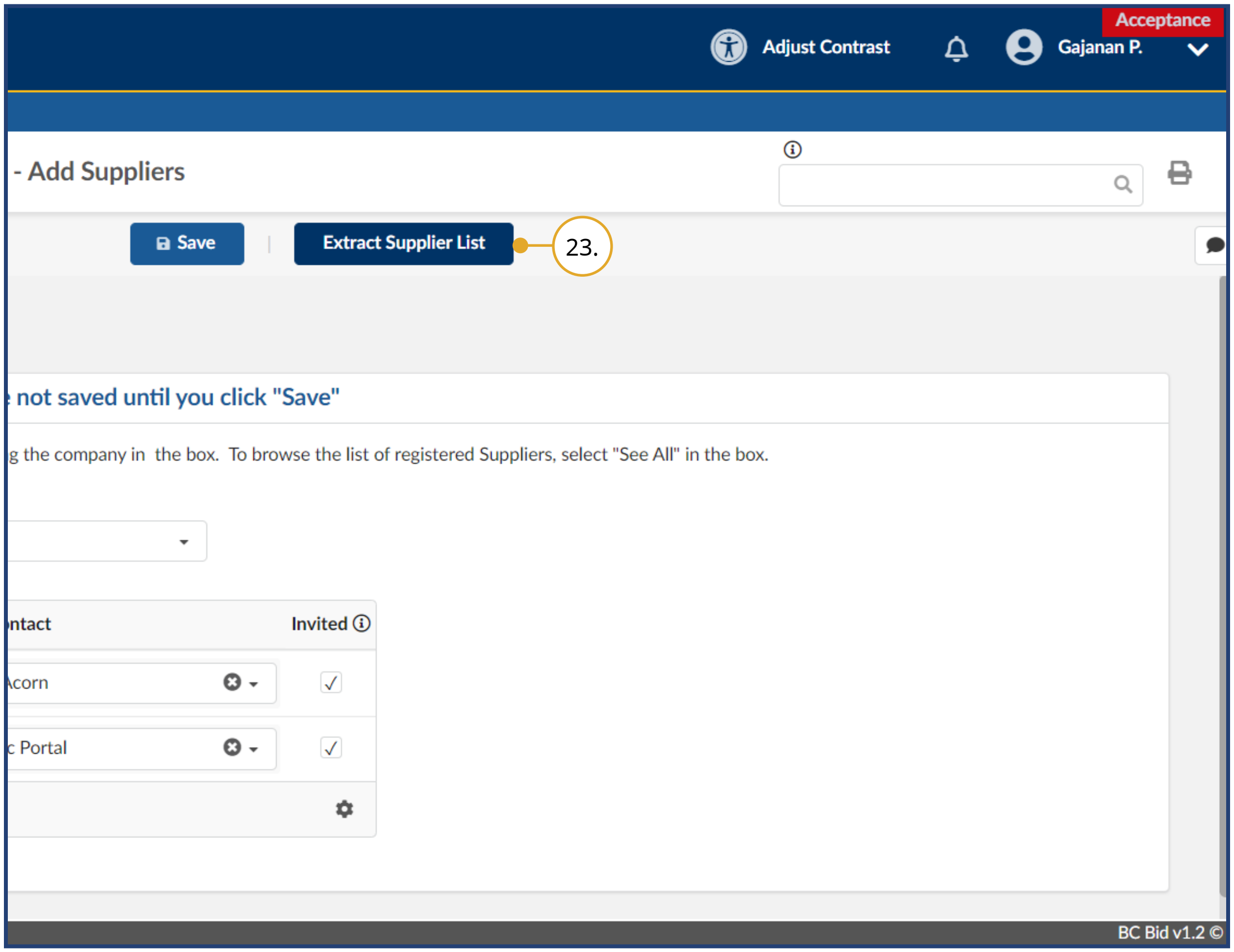
g. Click the newly created **Supplier** to edit the Supplier information.



h. In dialog box, in the left-hand sliding menu, select **Contacts**.
i. In Supplier contacts box, click **+ Create Contact**
    i. Enter the details of the Main Contact for the Supplier, or
    ii. Use **Select Existing Contact** to designate a contact as the Main Contact.
j. Complete other left-hand sliding menus as necessary.
k. Click **Complete Account Registration**.
l. Click **Save & Close**.

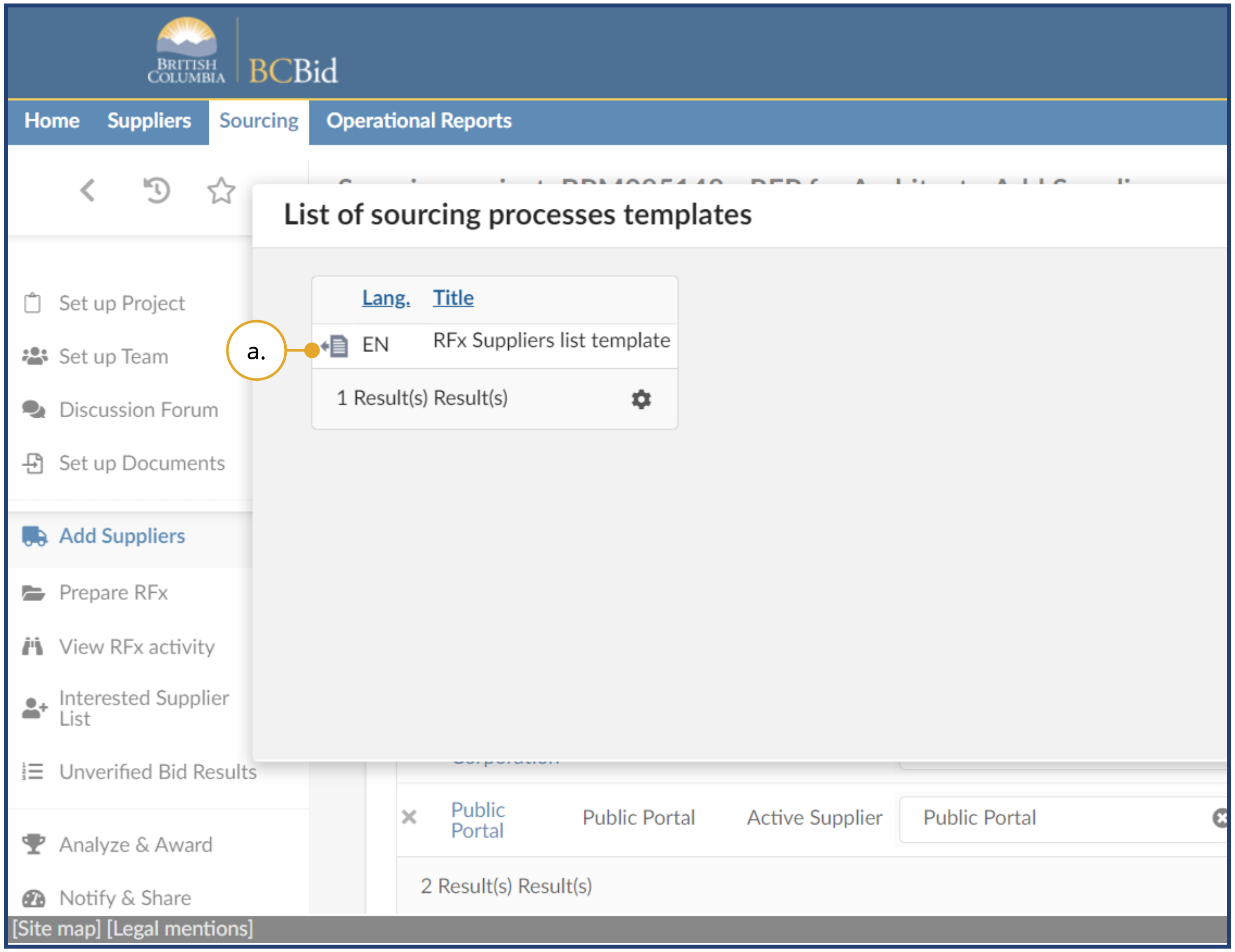
Extract Supplier List

Extracting the Suppliers list allows the list to be used outside of the BC Bid application.



23. To extract a Supplier list, go to the Add Suppliers menu, click **Extract Supplier List**.

[Removing Suppliers and Extracting Supplier List]()

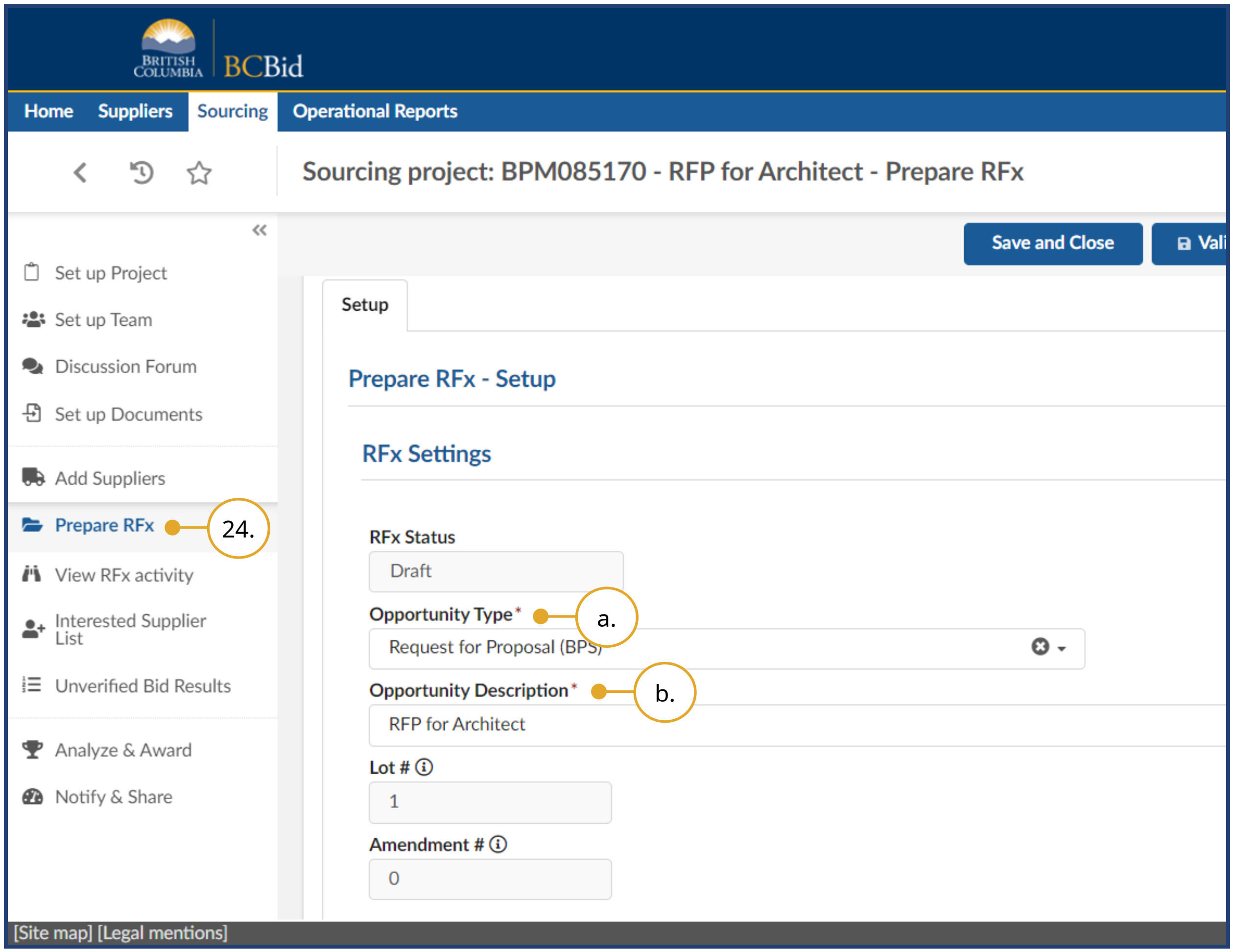


a. Click the **Download** icon (arrow and sheet of paper) to download a Microsoft Word file for your official records.

Step 2 – Prepare RFx

Setup Tab

This section is where all public or Supplier facing information in the opportunity is entered or uploaded. You will be working your way left to right through the tabs as they appear (e.g. Setup, Additional RFx Info; Documents; and Suppliers).

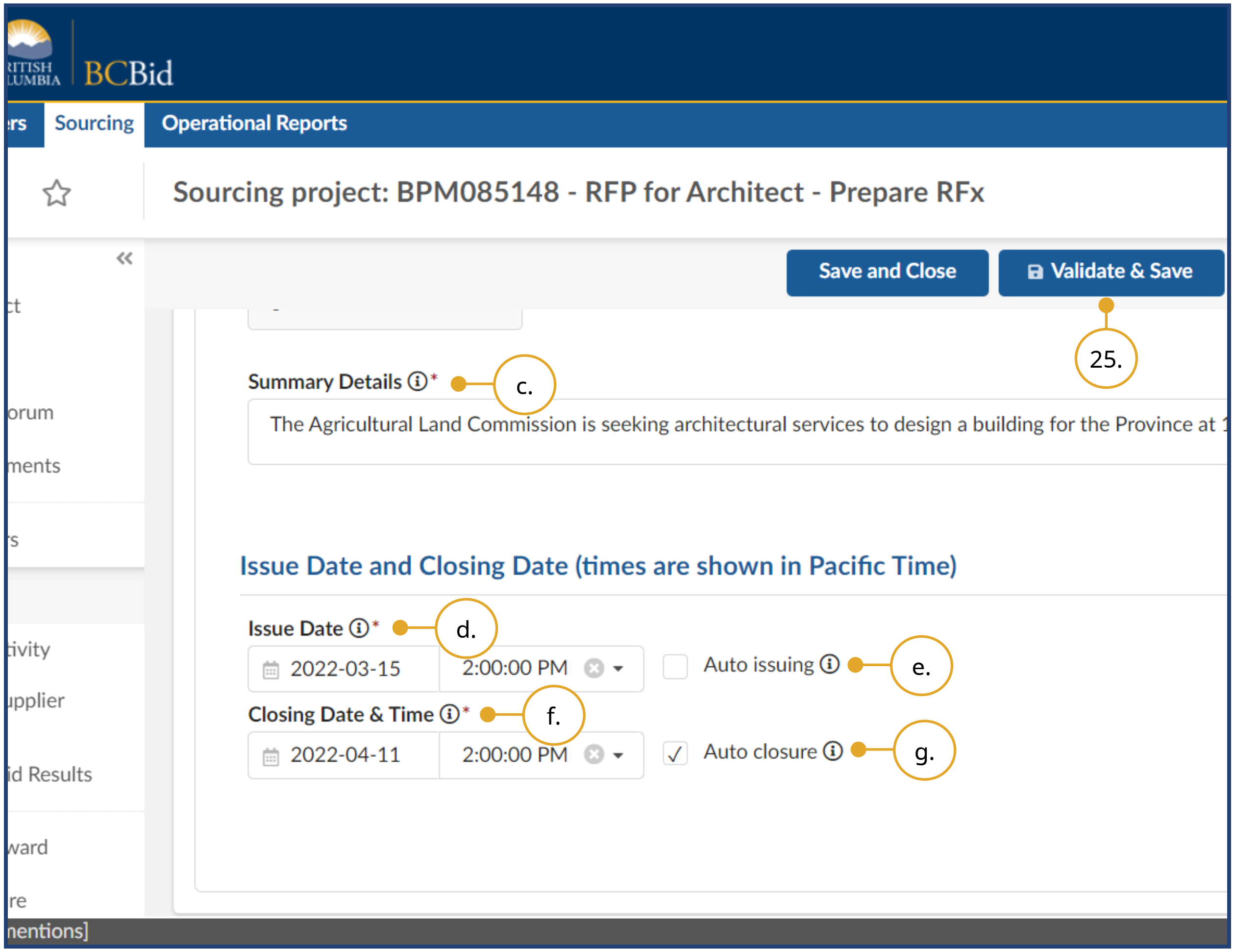


24. In the left-hand menu, click **Prepare RFx**, the Setup tab will open.

a. In the **Opportunity Type** drop-down list, select the appropriate template.

b. Review the **Opportunity Description**, and update if necessary.

Note: Once the **Opportunity Type** has been selected and the Validate & Save button clicked, the Opportunity Type cannot be changed. Changing the Opportunity Description in the Setup tab doesn't change the **Opportunity Description** in the Set up Project menu.

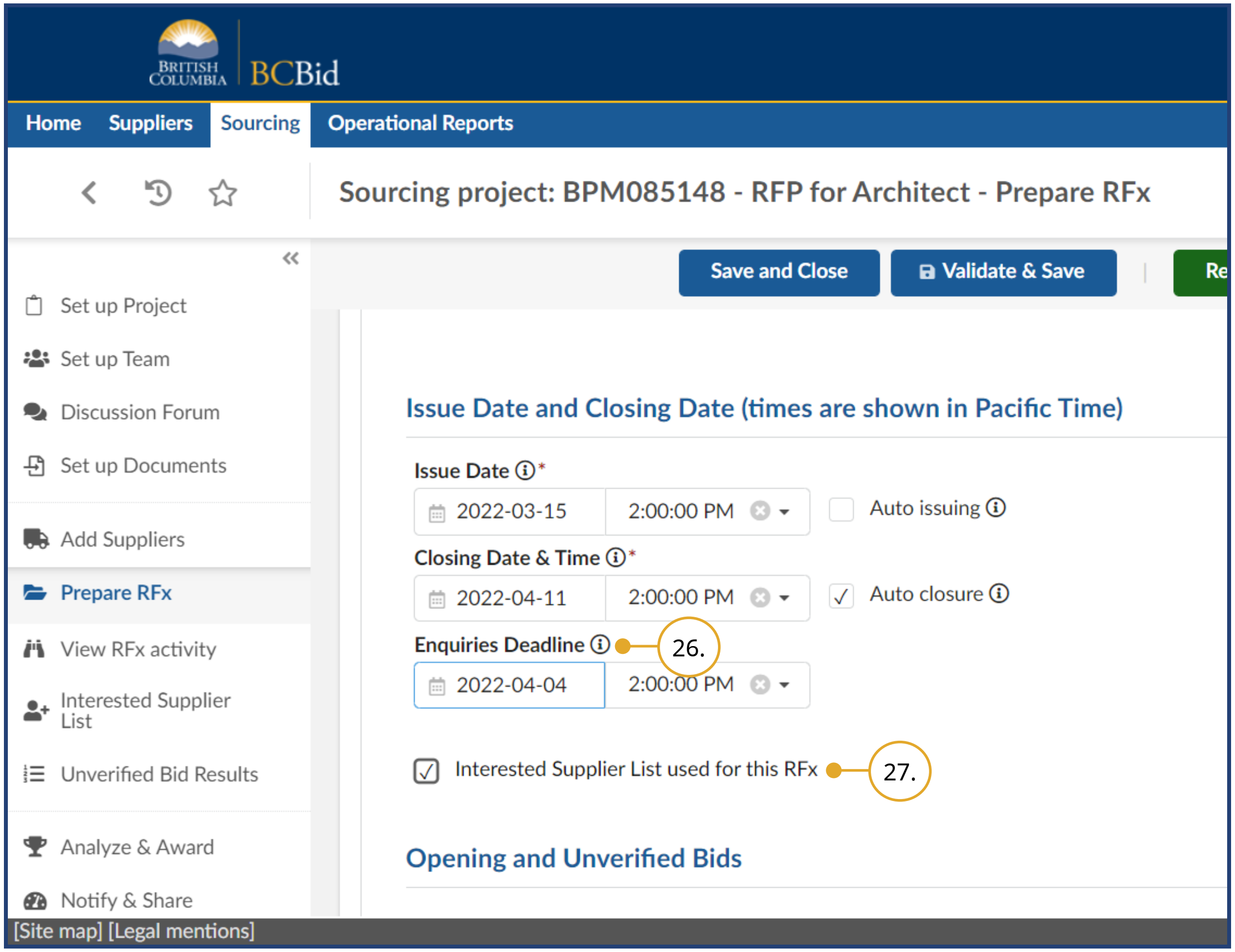


c. In the **Summary Details** text box, enter a summary of the opportunity.
d. Select an **Issue Date** and time.
e. *Optional*: Select the **Auto issuing** checkbox.
f. Select a **Closing Date & Time**.
g. *Optional*: Deselect the **Auto closure** checkbox.

25. Click **Validate & Save** and continue in the Setup tab.

Note: Click **Save and Close** to save any changes and exit the Sourcing Project.

Auto issuing automatically posts the opportunity to BC Bid at the selected date and time (once all approvals are complete). **Auto closure** checkbox automatically closes the opportunity at the closing date and time. The auto-generated **Opportunity ID** can be edited until the opportunity is in draft status.

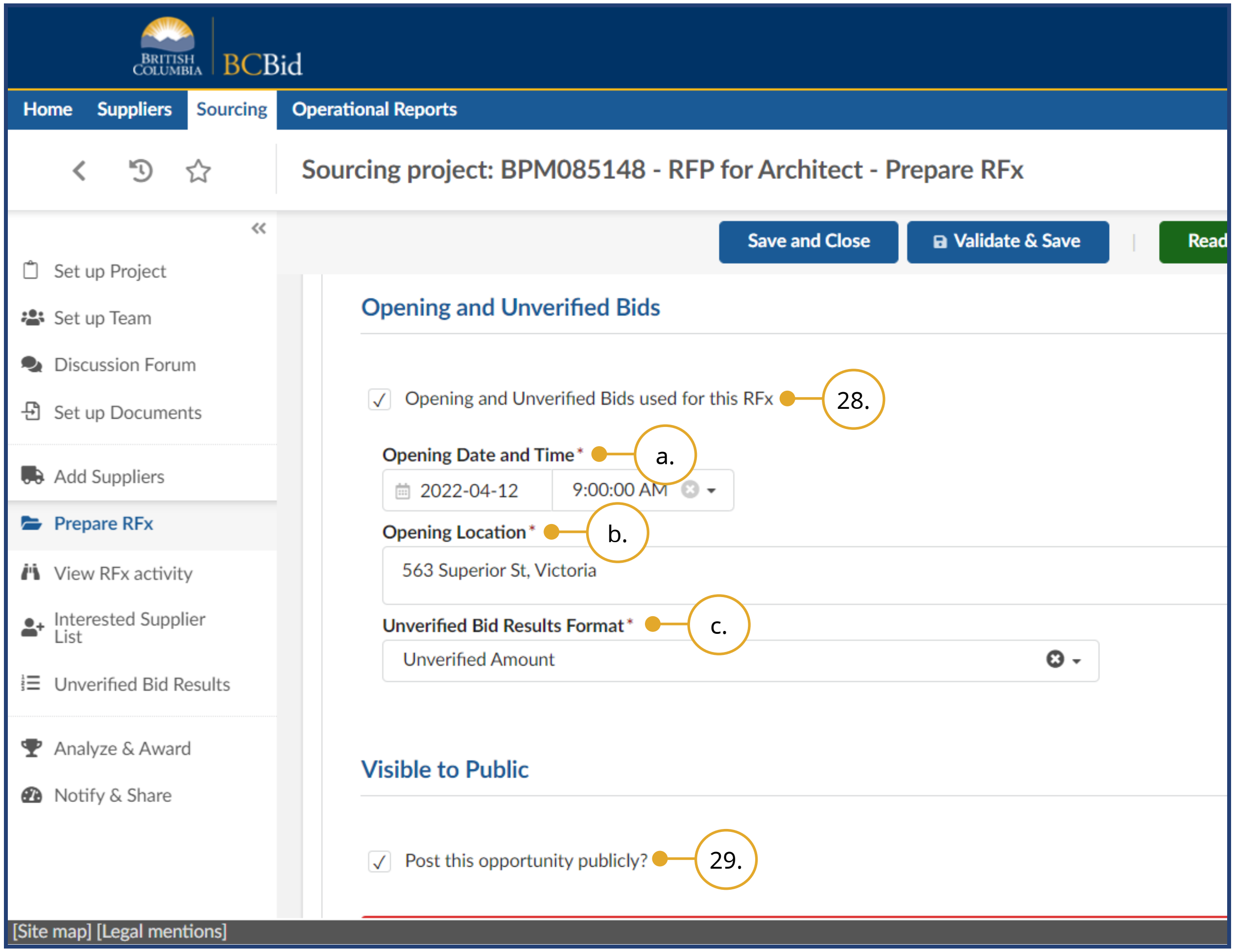


26. *Optional*: In the **Enquiries Deadline** field, select the preferred date and time deadline for submitting enquiries.
    Note: if at a later time the closing date is extended, the enquiries deadline can be extended without an amendment.

27. *Optional*: Select the **Interested Supplier List used for this RFx** checkbox to include public-facing Interested Supplier List functionality into the opportunity.

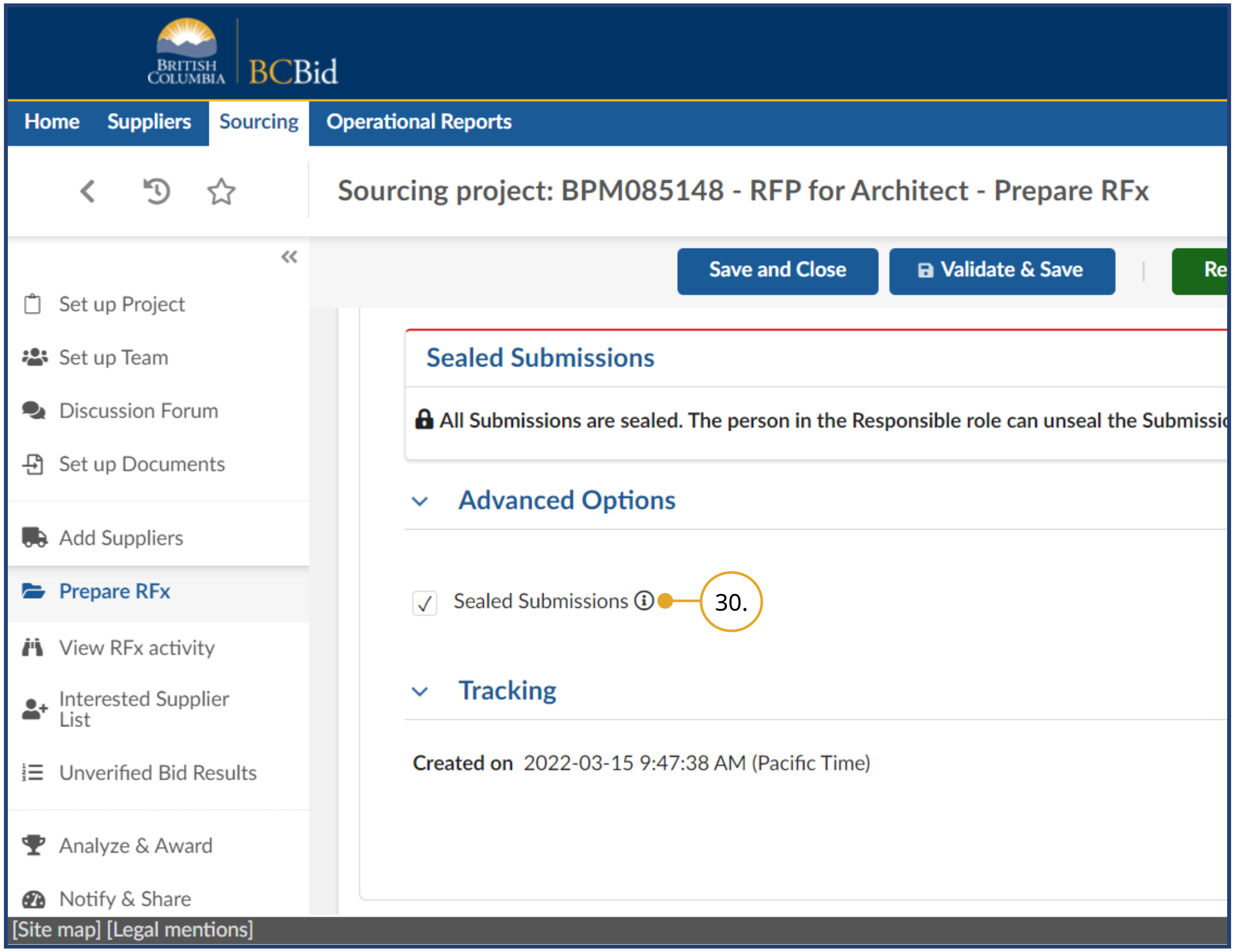
    Once issued, Suppliers will have the option to add themselves to the opportunity's Interested Supplier List. The benefit is that small Suppliers can see and contact general Contractors who are developing Submissions or vice-versa.

BPS entities will now use the **Interested Supplier List** instead of the Planholder List as used in old BC Bid.



28. *Optional*: Select the **Opening and Unverified Bids used for this RFx** checkbox to allow Buyers to open the bids and publish the bid amount, Supplier name or rank before doing any compliance check.
    Note: This option may not be applicable to all opportunity types or users.
    a. Select the **Opening Date and Time**.
    b. Enter the **Opening Location**.
    c. Select an option from the **Unverified Bid Results Format** drop-down list.
29. *Optional*: In the **Visible to Public** section, deselect the **Post this opportunity publicly** checkbox. This option is available for invite-only opportunities only.

Click **View as Supplier** button to preview the opportunity as a Supplier would see it. This button is visible in all tabs within Prepare RFx menu.

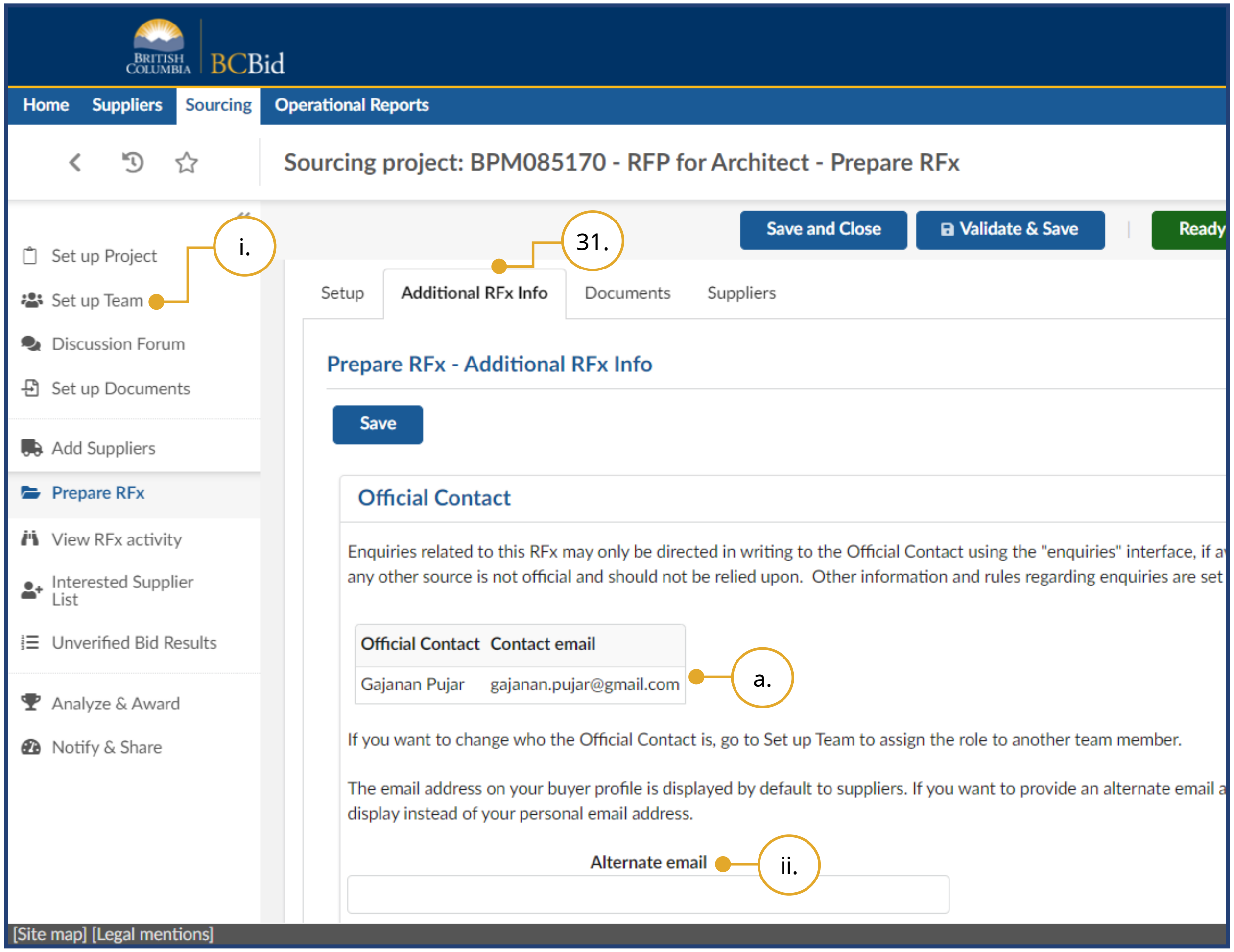


30. *Optional*: In the Advanced Options section, deselect the **Sealed Submissions** checkbox. Then scroll to the top.

Note: The Sealed Submissions checkbox is selected by default. This means opportunities must pass the Closing Date and Time before Submissions can be unsealed. Deselecting this checkbox should be done for any opportunity where Submissions are opened continuously as they are received, such as for an RFI.

To save all progress, Buyers <u>must</u> click **Save** before navigating to a different tab or menu. Note: The **Save** button is different from **Validate & Save**. Save will save the sourcing project without checking the template for errors. Validate & Save will only save if all mandatory fields are filled out correctly.

Additional RFx Info Tab



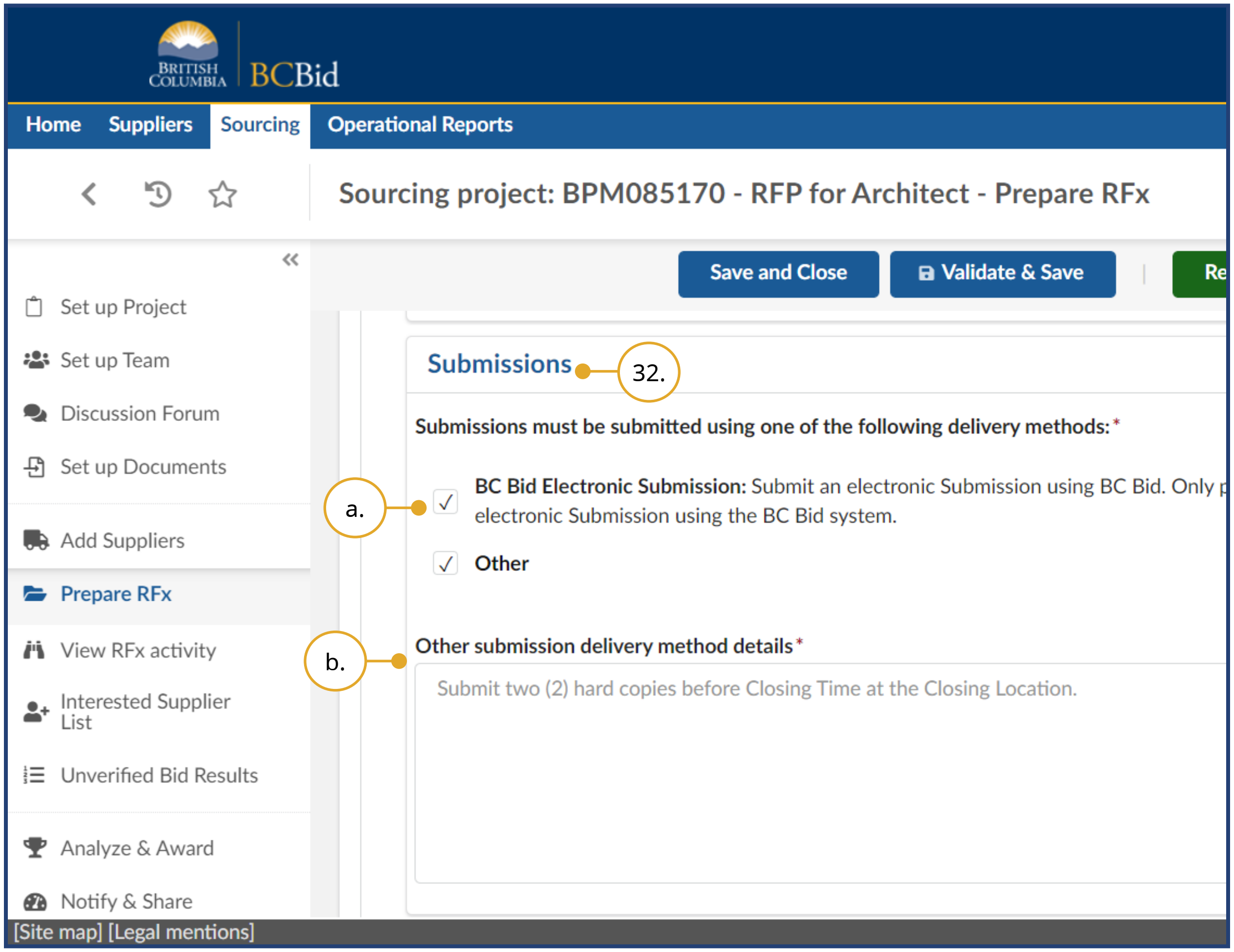
31. Click the **Additional RFx Info** tab.

a. Review the Official Contact.

   i. To edit the Official Contact, click **Set up Team** and change the Official Contact.

   ii. *Optional*: Enter an **Alternate email**; this will replace the default user email address of the Official Contact in the Supplier view. This is an information-only field for non-registered Suppliers to use when emailing questions.

[Additional RFx Info tab]



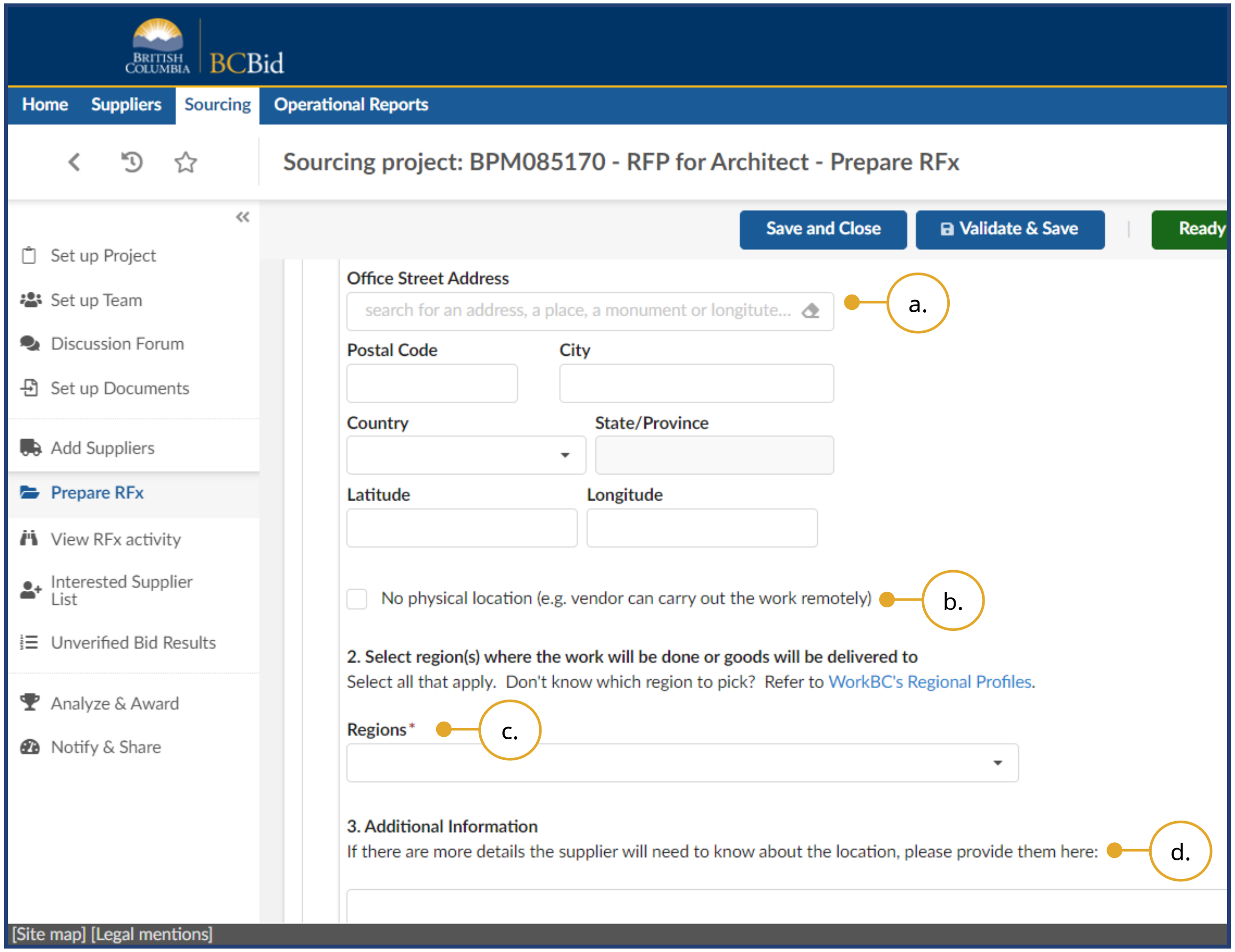
32. Select the **Submissions** delivery methods using the appropriate checkboxes.

a. To allow the Suppliers to submit a Submission electronically through BC Bid, select the **BC Bid Electronic Submission** checkbox.

   Note: A Supplier can only submit an electronic Submission if they are registered and have subscribed to that service.

b. If the **Other** checkbox is selected, provide details in the **Other submission delivery method details** text box.

   Note: If managing the opportunity on an external sourcing platform, you could add the link to the external sourcing platform in the **Other submission delivery method details** text box.



33. In the Delivery Location for Goods, Services, or Construction section, complete the following:

a. *Optional*: Enter the physical address where goods need to be delivered or Supplier will carry out work in the **Office Street Address** text box.

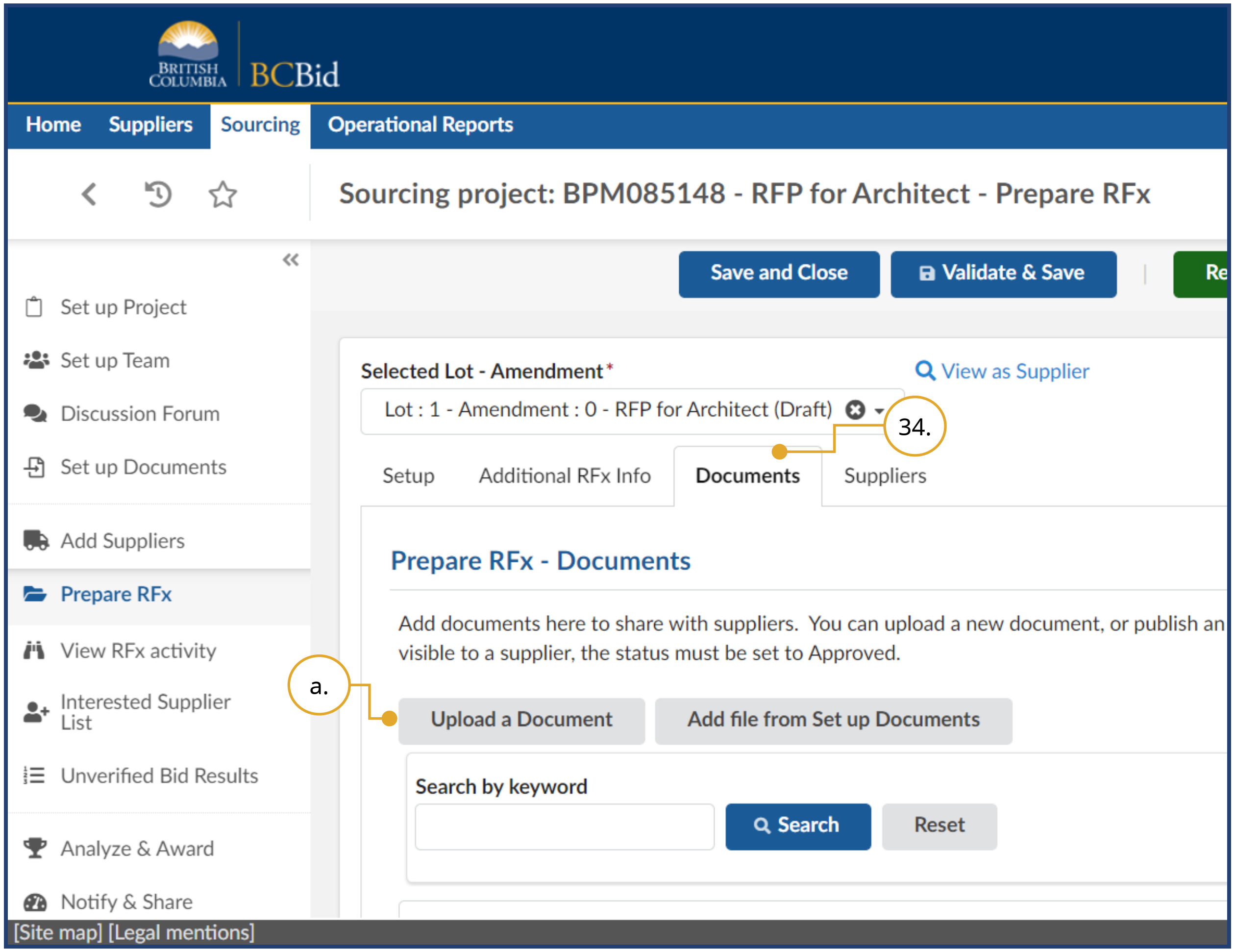
b. *Optional*: Select the **No physical location** checkbox if the work can be carried out remotely.

c. Using the **Regions** drop-down list select the region(s) where the work will be done, or goods will be delivered.

d. *Optional*: If there are more details the Supplier will need to know about the location, provide them in the **Additional Information** text box.

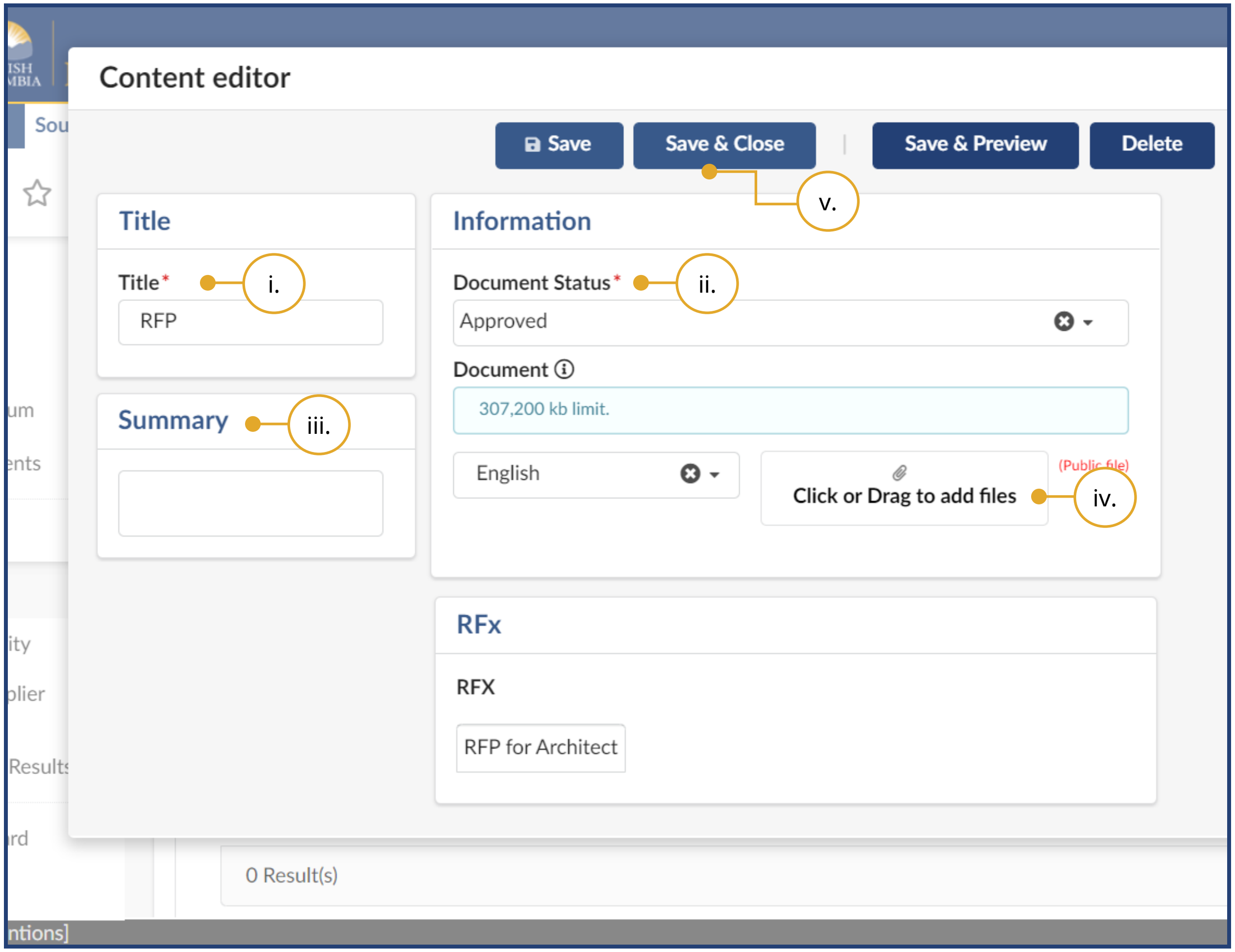
Documents Tab

There are two ways to upload documents to your opportunity that will be made visible to Suppliers – uploading a document from outside the BC Bid application into Documents tab or transferring documents that have already been uploaded to Set up Documents menu.



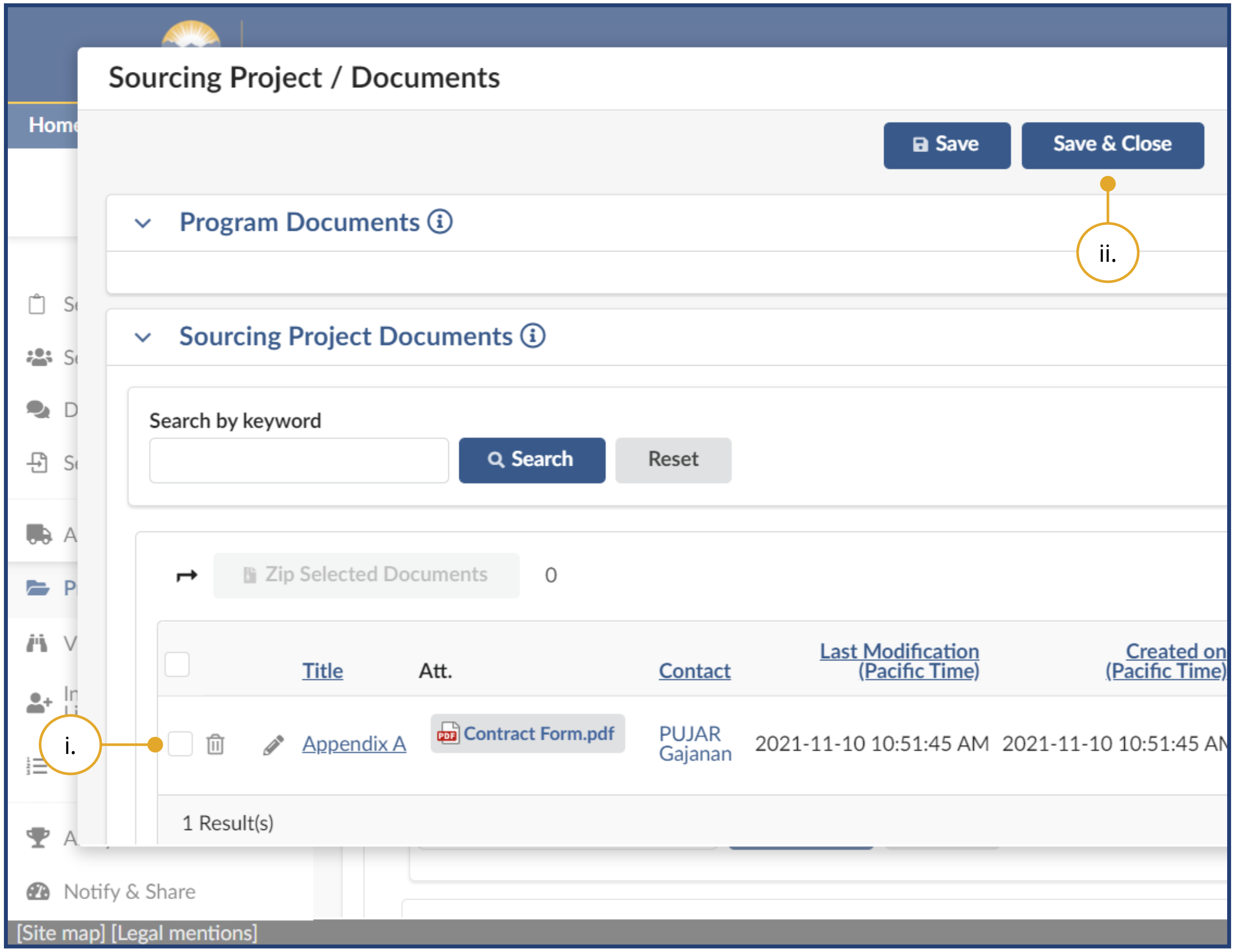
34. Click the **Documents** tab.
   a. Click **Upload a Document** to add a new document. This will open Content editor dialog box.

   Note: Documents uploaded using **Upload a Document** button will automatically be added to Set up Documents in the left-hand menu.



i. Enter the document **Title**.
ii. Use the **Document Status** drop-down list to select **Approved** to make the file visible to Suppliers.
iii. *Optional*: Enter a **Summary** (e.g., time last updated and by whom).
iv. To upload files, click the **Click or Drag to add files** button or drag and drop files on top of the button.
v. Click **Save & Close**.

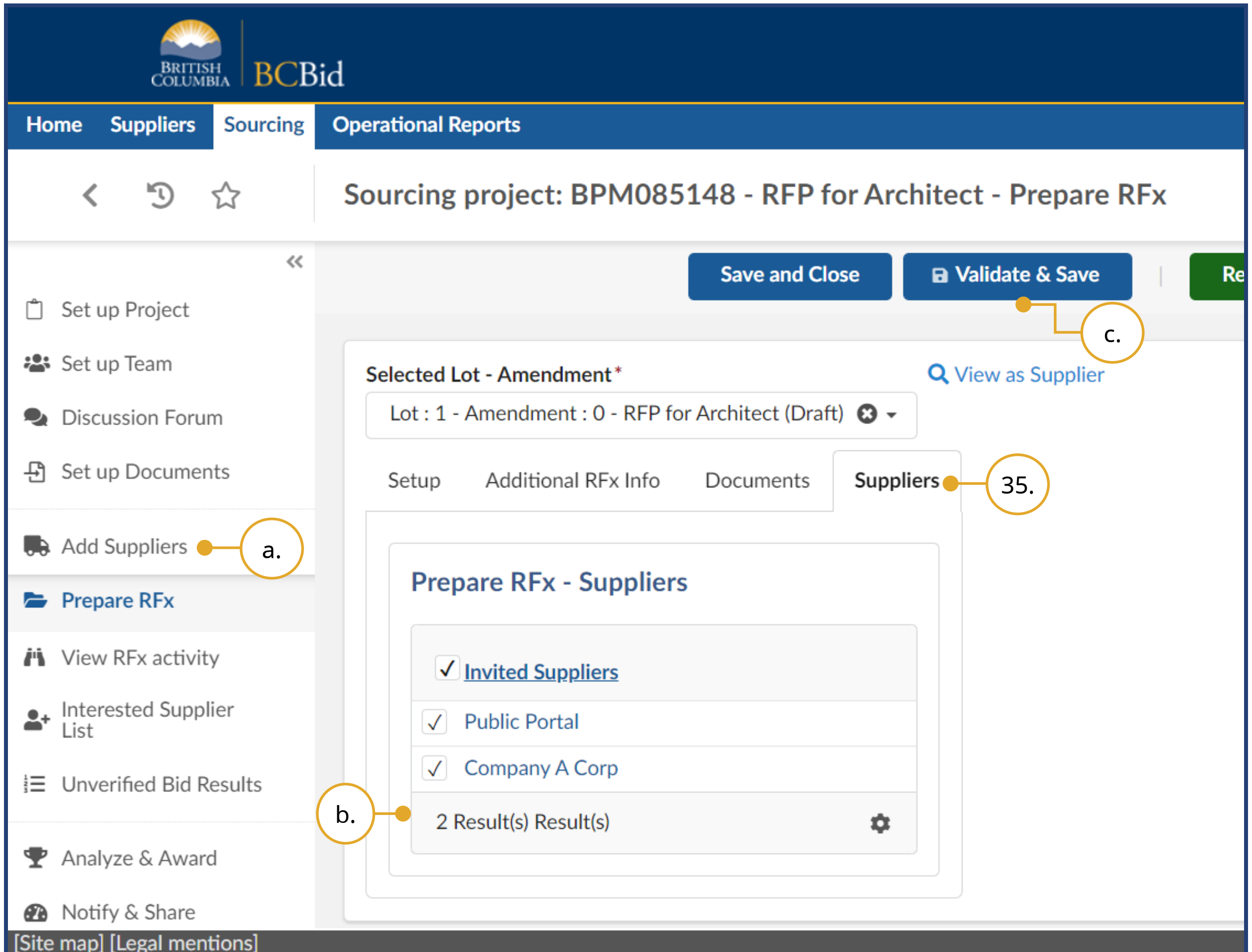
If the **Document Status** is Draft, the document will not be visible to Suppliers.



b. To add an existing document, click **Add file from Set up Documents** button in the Documents tab.
    i. In the dialog box, select the documents you want to add.
    ii. Click **Save & Close**.

[How to transfer documents from Set up Documents menu]()

Suppliers Tab

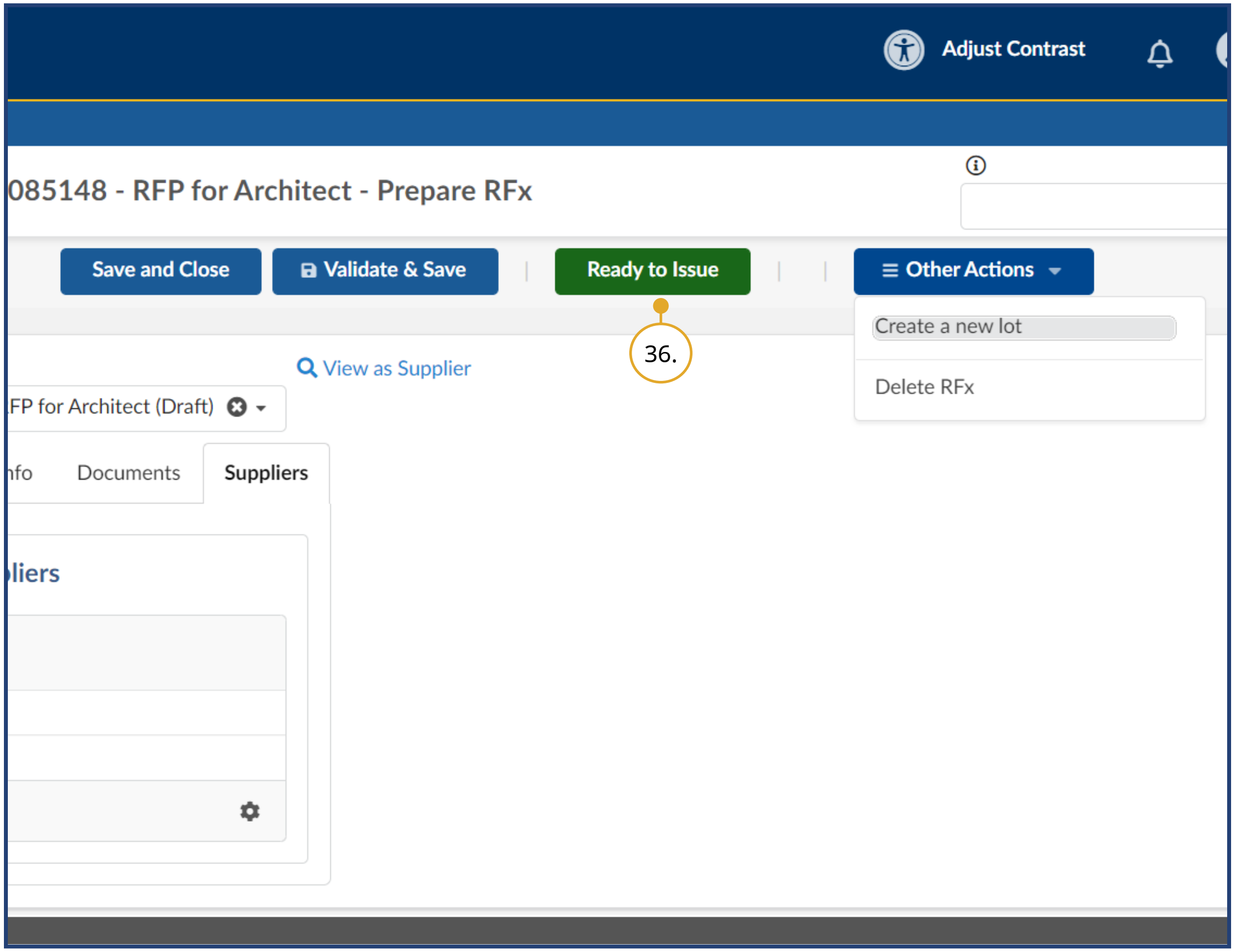


35. *Optional*: Click the **Suppliers** tab to review the list of invited Suppliers.
a. To add Suppliers to the list, click **Add Suppliers** in the left-hand menu.
b. If a Supplier should not be receiving an invitation, deselect that Supplier.
c. Click **Validate & Save**.

NOTE: When adding suppliers, Shell Suppliers will be marked with **[SHELL (Unregistered) Supplier]** to the right of the supplier's name.

Click **View as Supplier** button to preview the opportunity as a Supplier would see it.

Step 3 – Issue Opportunity

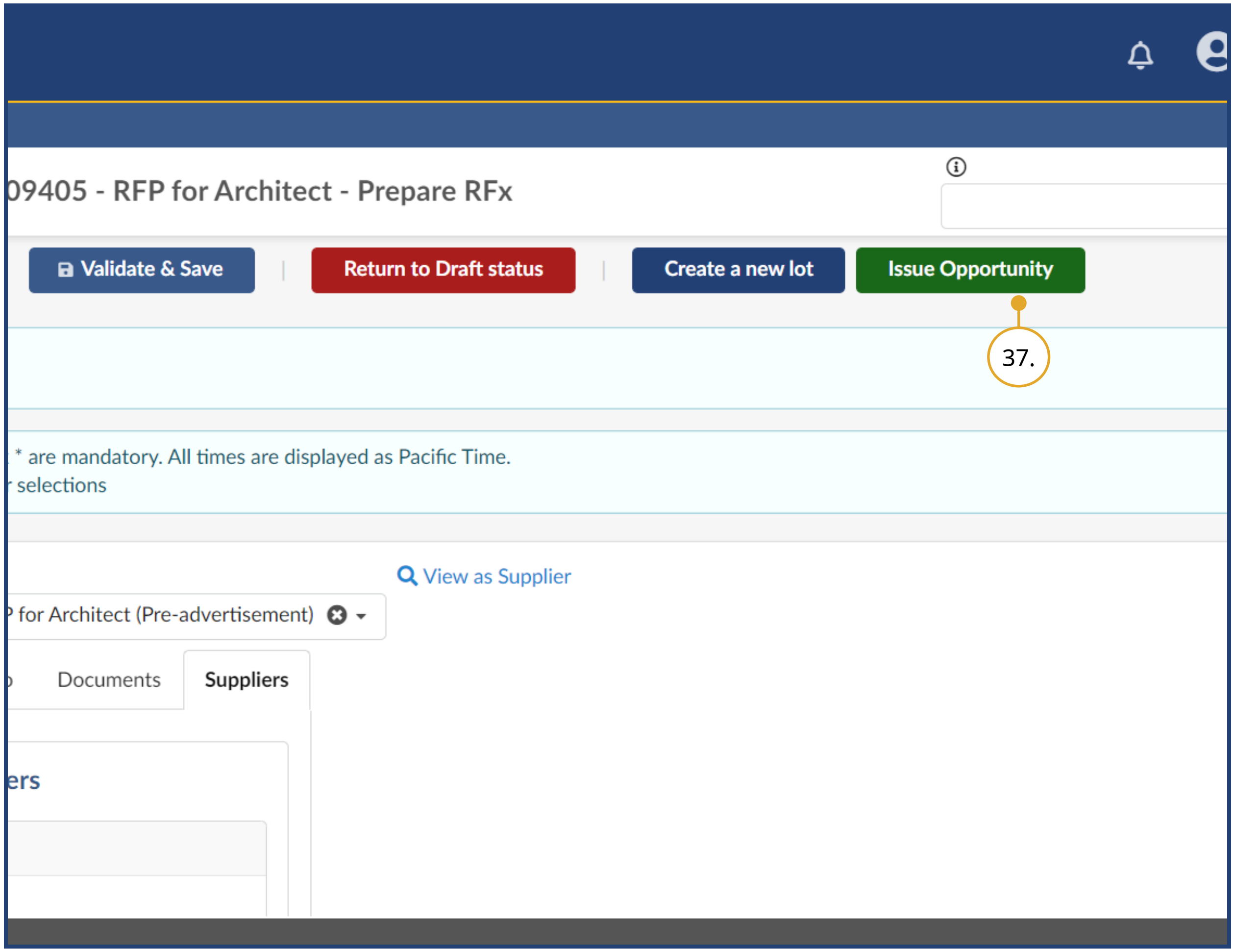


36. Click **Ready to Issue**.

Note: To delete a draft opportunity, click the **Other Actions** drop-down button and select **Delete RFx**. To undelete a draft RFx, contact BC Bid Help Desk. Deleted opportunities are not visible in the Sourcing Projects menu.

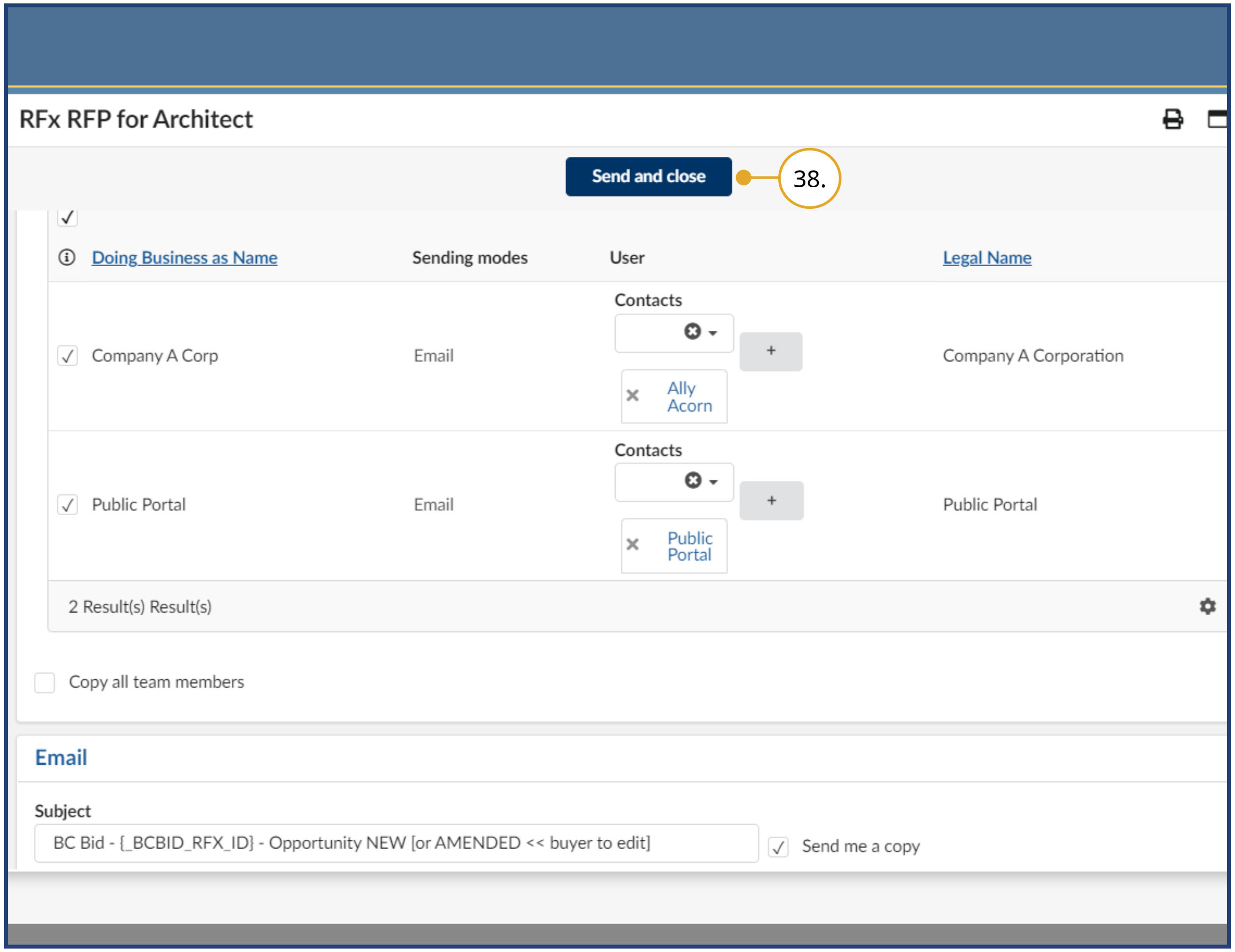
[Issuing an Opportunity]()

If the **Auto issuing** checkbox is selected in the Setup tab, the BC Bid application will automatically post the opportunity at the Issue Date & Time.



37. Click **Issue Opportunity**.

Note: Click **Return to Draft status** to continue drafting the opportunity.



38. In the dialog box, the Public Dashboard and all invited Suppliers will be selected to receive a notification of the opportunity, deselect any that do not apply and then click **Send and Close**.

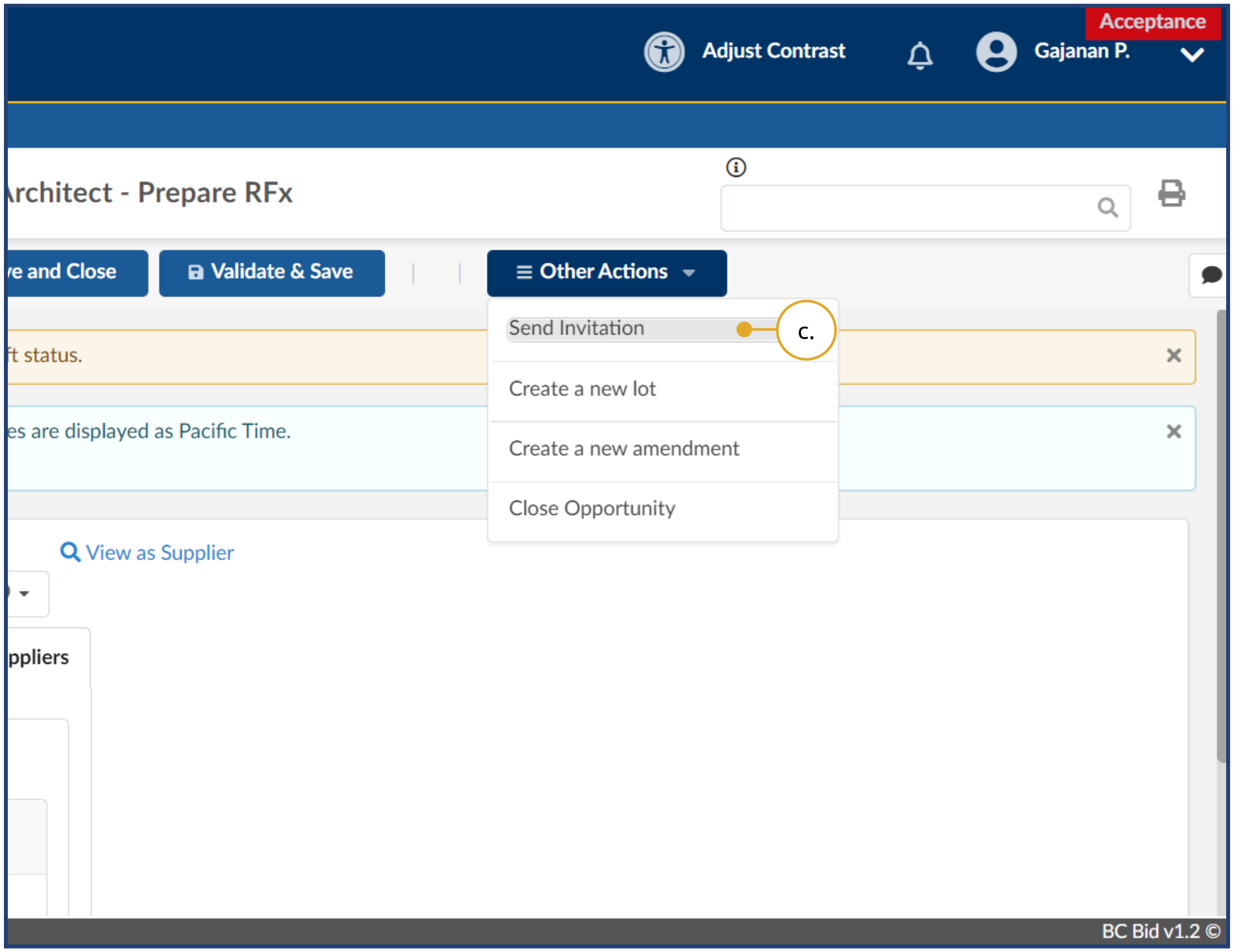
Note: After clicking Send and Close, Buyers should review the two messages that display and click **OK** to issue the opportunity.

To receive a copy of the opportunity by email, Buyers must select the **Send me a copy** checkbox.

Buyers should edit the subject and body of the email notification as necessary to ensure that Suppliers know if the opportunity is new or has been amended. Any content contained within curly brackets in the email notification will auto-fill from fields in the BC Bid application.

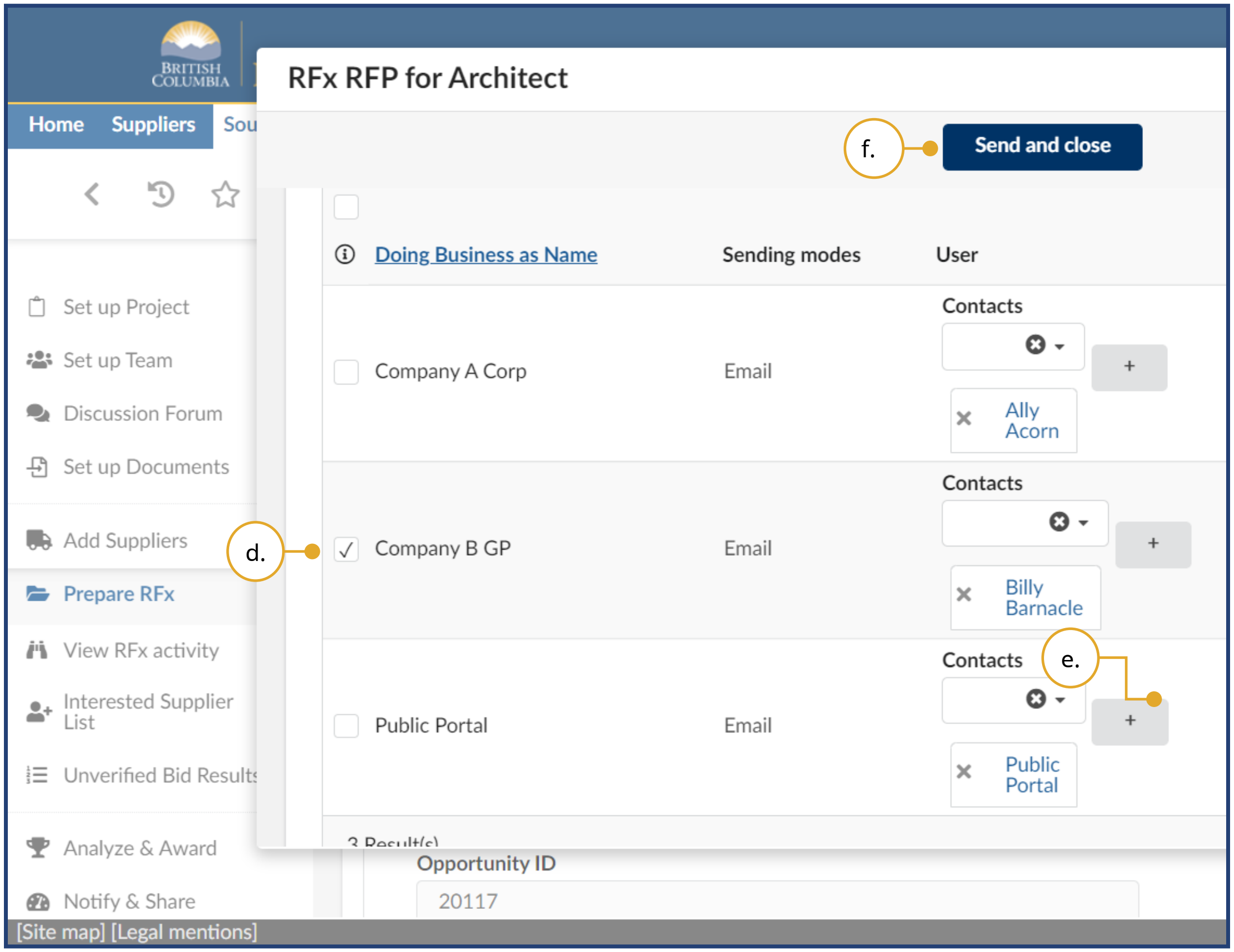
Step 4 – Manage Open Opportunity

Inviting Supplier to Open Opportunity



39. *Optional*: To add a Supplier to an open opportunity:
    a. In **Add Suppliers** menu, add the new Supplier and click **Save**.
    b. In the left-hand menu, click **Prepare RFx**.
    c. From the Other Actions drop-down list, select **Send Invitation**.

Note: "The ability to edit the RFx is limited when not in Draft status" is a warning that many fields are locked down when an opportunity is not in draft status.

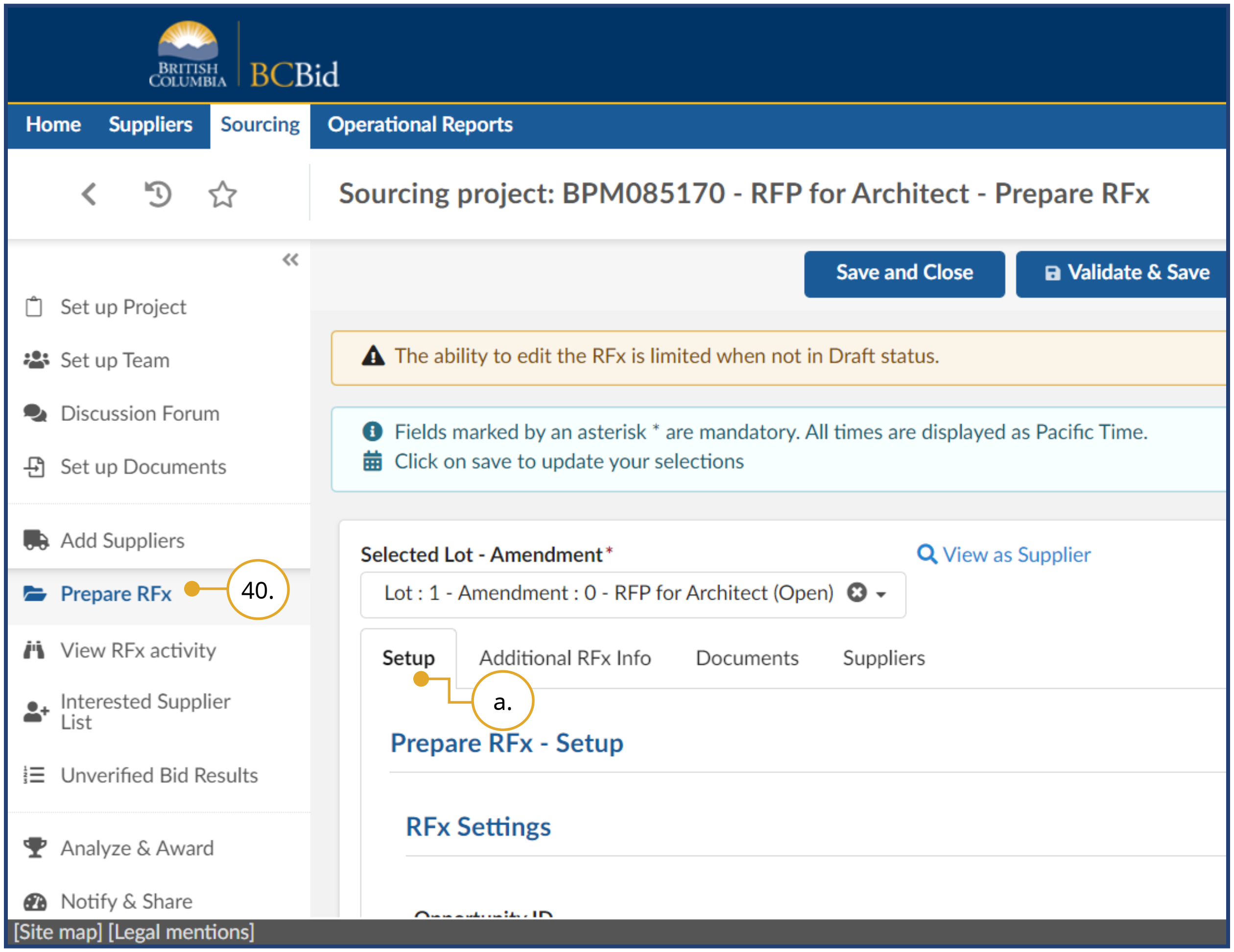


d. In the dialog box, select the new Supplier.
e. *Optional*: Click the **+** button to add a contact to the Supplier profile.
f. Click **Send and close**.

NOTE: Shell Suppliers will be marked with **[SHELL (Unregistered) Supplier]** to the right of the supplier name.

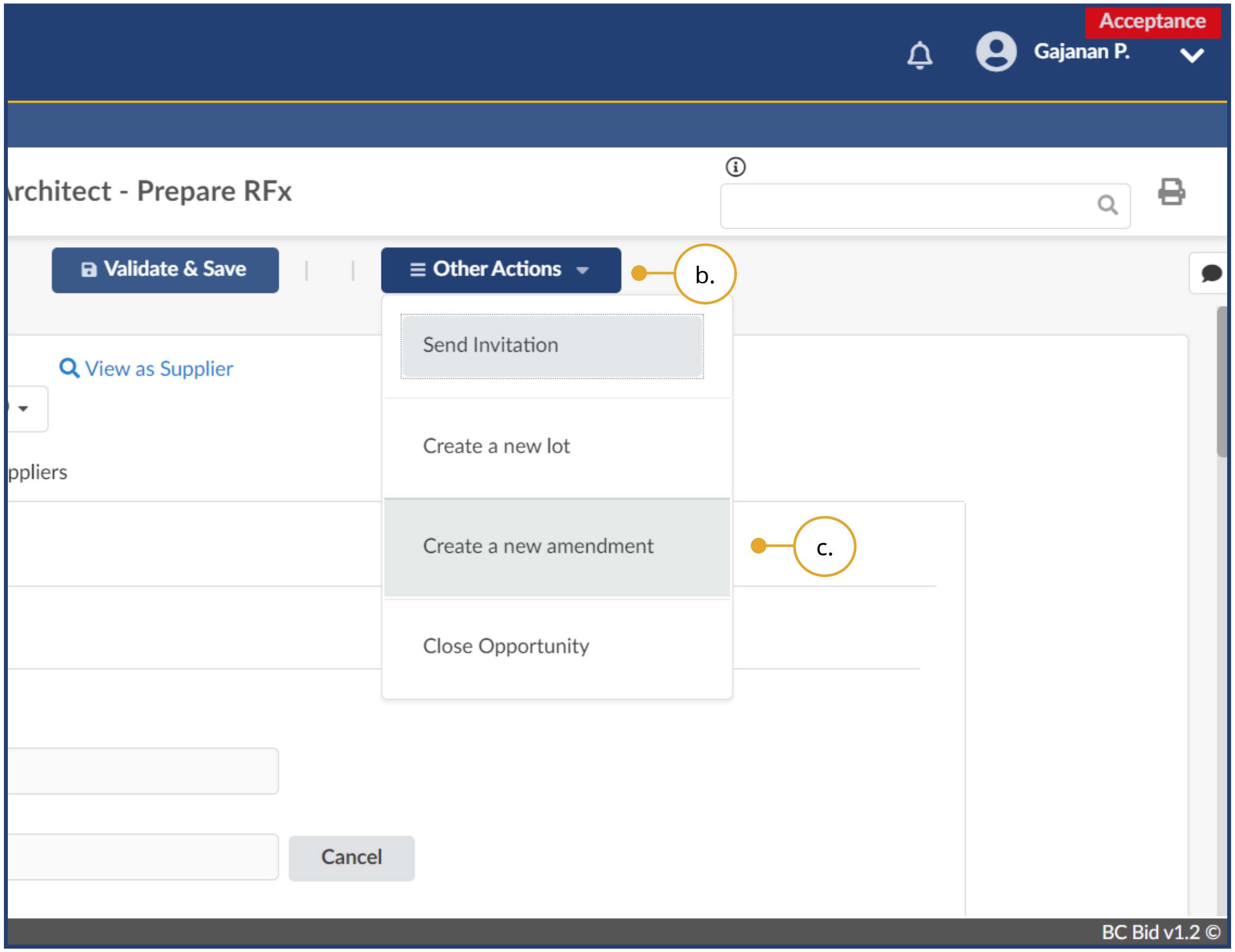
Creating an Amendment

An Amendment is created to make changes to an opportunity that cannot be done through an Addendum. Changes to the information in a document attached to an opportunity is an example of an Amendment. Amendments will require Suppliers to submit new Submissions.

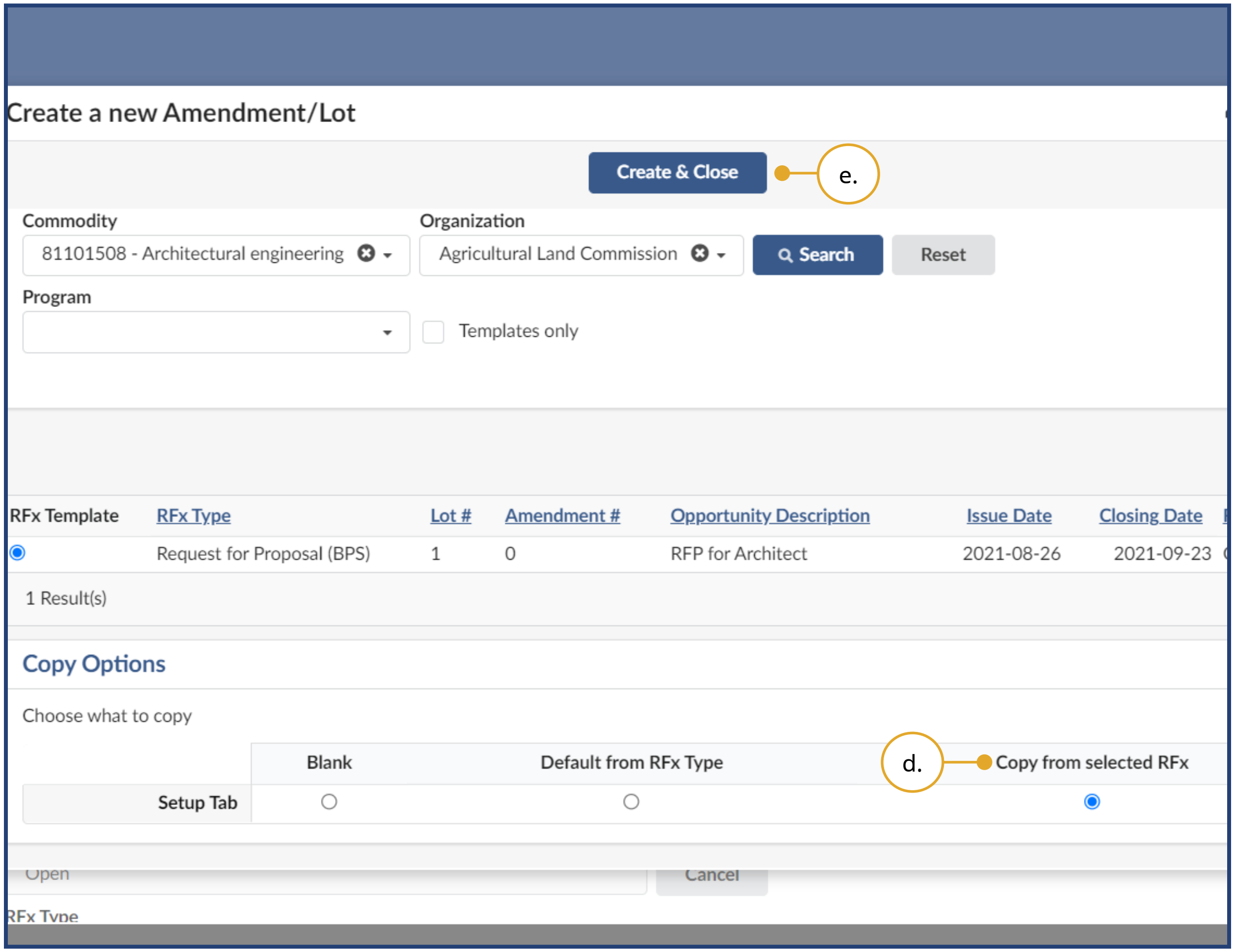


40. *Optional*: To create an Amendment, in the left-hand menu, click **Prepare RFx**.
a. Click the **Setup** tab.

[Issue an Amendment]



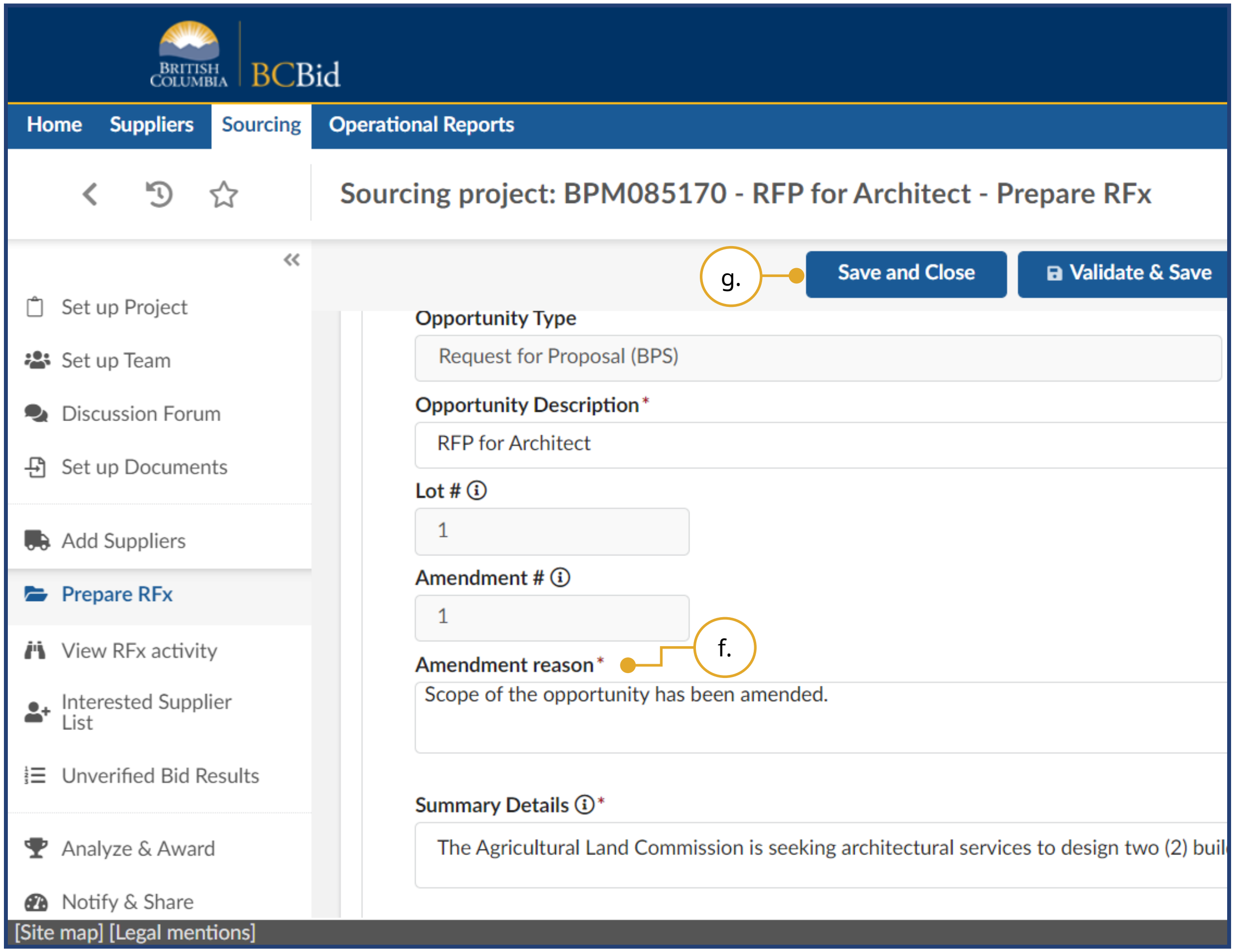
b. Click the **Other Actions** drop-down list.
c. Click **Create a new amendment**.



d. In the dialog box, within the Copy Options table, ensure the **Copy from selected RFx** option is selected.

e. Click **Create & Close** and then click **Continue**.

Only select **Copy from selected RFx**. Do not select **Blank** or **Default from RFx Type**.



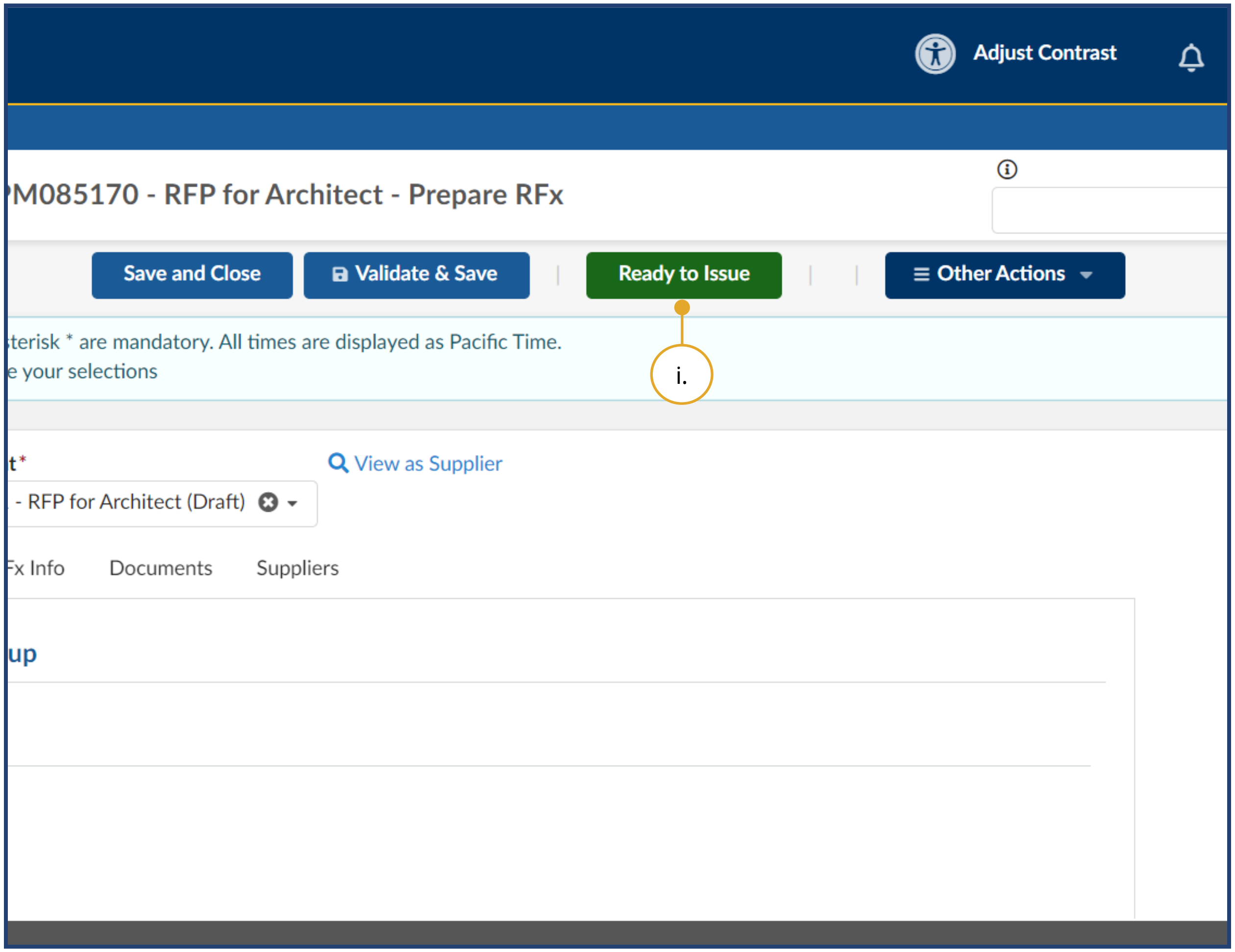
f. Enter the reason for the amendment in the **Amendment reason** text box.

g. Click **Validate & Save**.

h. Amend the opportunity as necessary.

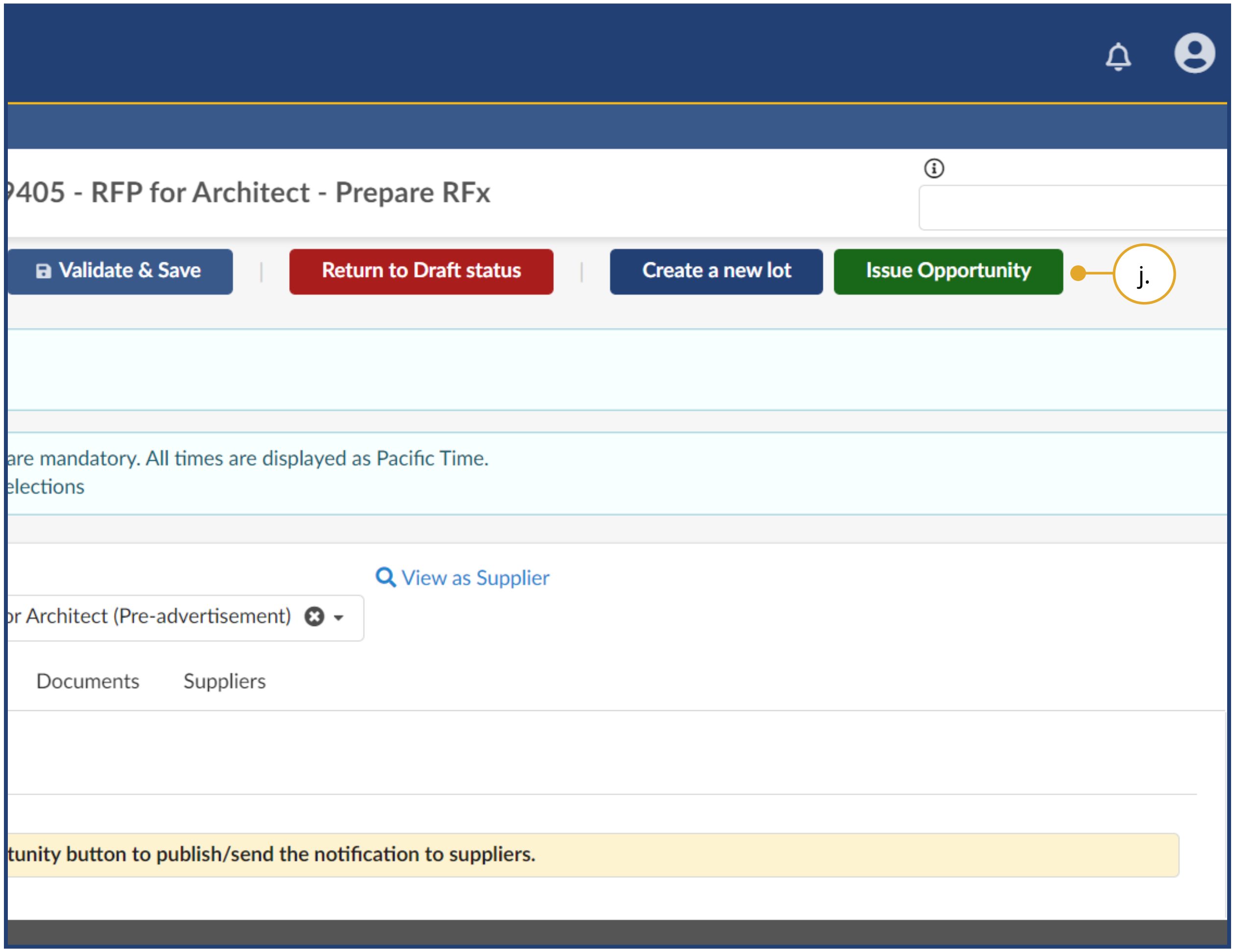
Note: Click **Validate & Save** again after amending the opportunity.

It is recommended that Buyers rename document titles (e.g. with "_amended") in the Documents tab as it can be confusing for Suppliers to determine which document has been changed.

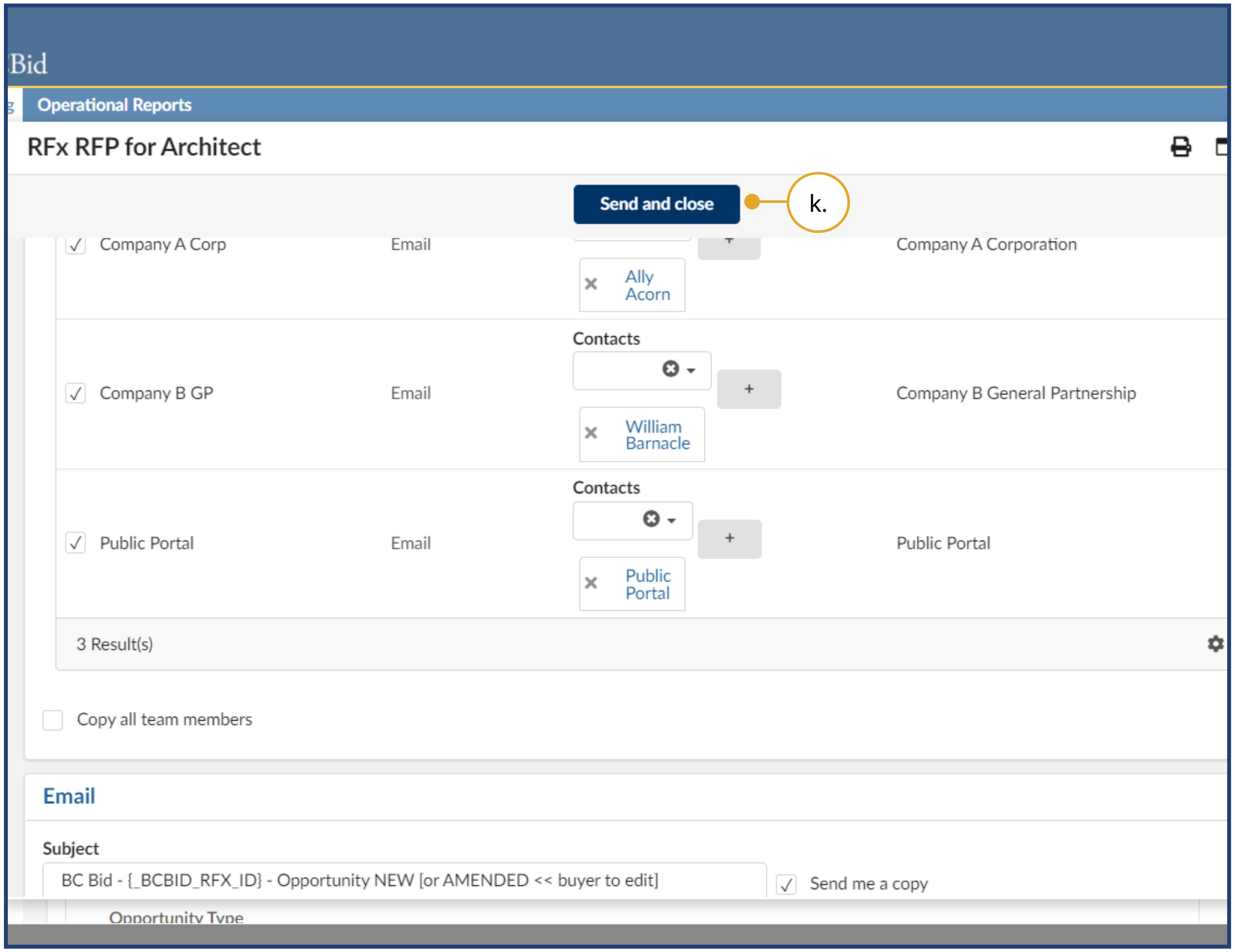


i. Click **Ready to Issue**.

Note: To delete a draft Amendment/Lot, click the **Other Actions** drop-down button and select **Delete RFx**. This won't impact the original opportunity.



j. Click **Issue Opportunity**.



k. Click **Send and close**.

Note: After clicking Send and close, Buyers should review the three messages that display and click **OK** to issue the amended opportunity.

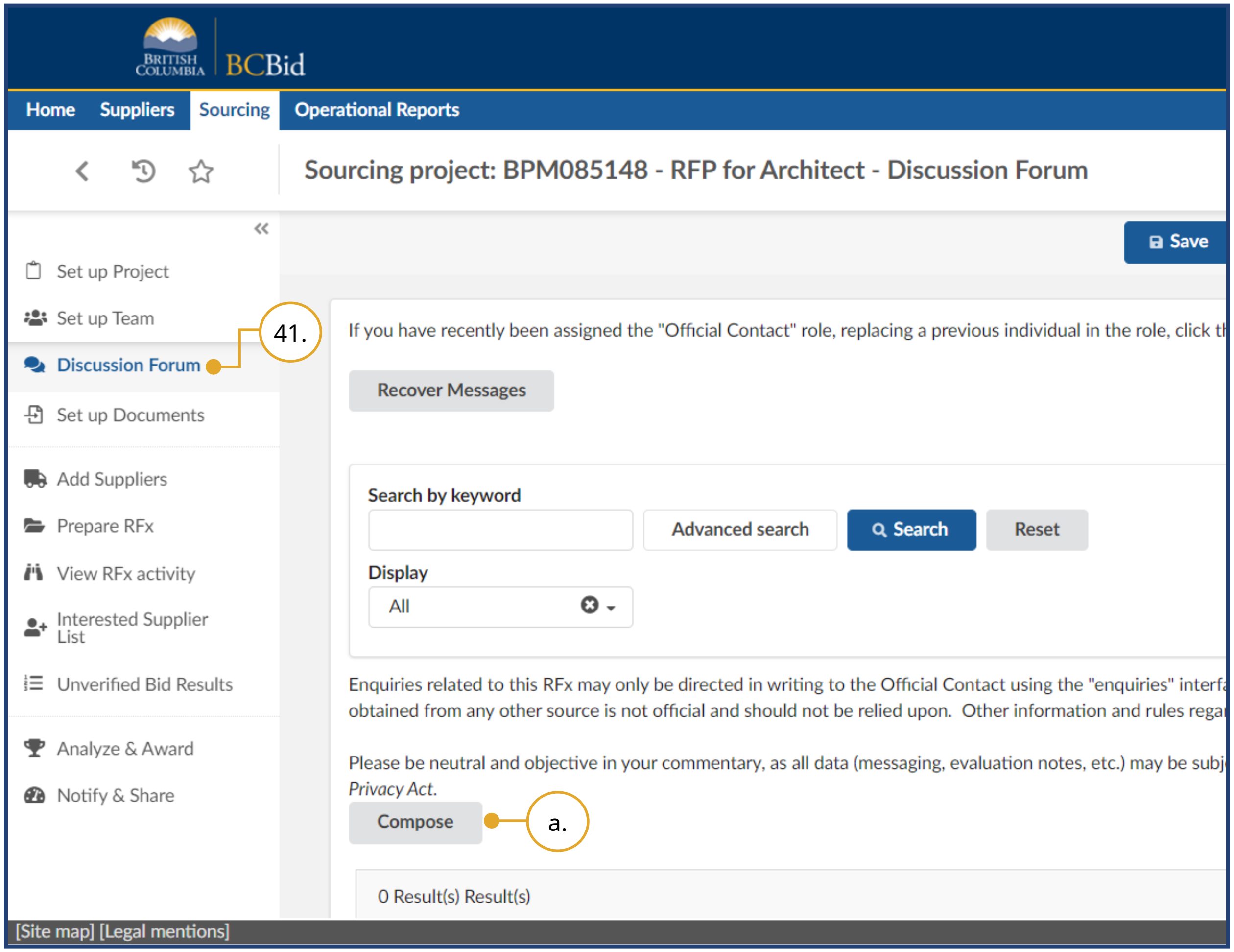
Once a Supplier has expressed interest in the opportunity through BC Bid, they will be added to the 'Add Suppliers' menu and will be visible in this dialog box, so they will receive the amendment notice unless deselected.

To receive a copy of the opportunity by email, Buyers must select the **Send me a copy** checkbox.

Buyers should edit the subject and body of the email notification as necessary to ensure that Suppliers know if the opportunity is new or has been amended. Any content contained within curly brackets in the email notification will auto-fill from fields in the BC Bid application.

Creating an Addendum

An Addendum is created in the Discussion Forum to make minor changes or clarifications to an opportunity. Items that are changed via Addendum could be: clarification on a requirement, responding to a Supplier question, and providing additional information with an additional document. Creating an Addendum will not require Suppliers to submit a new Submission.



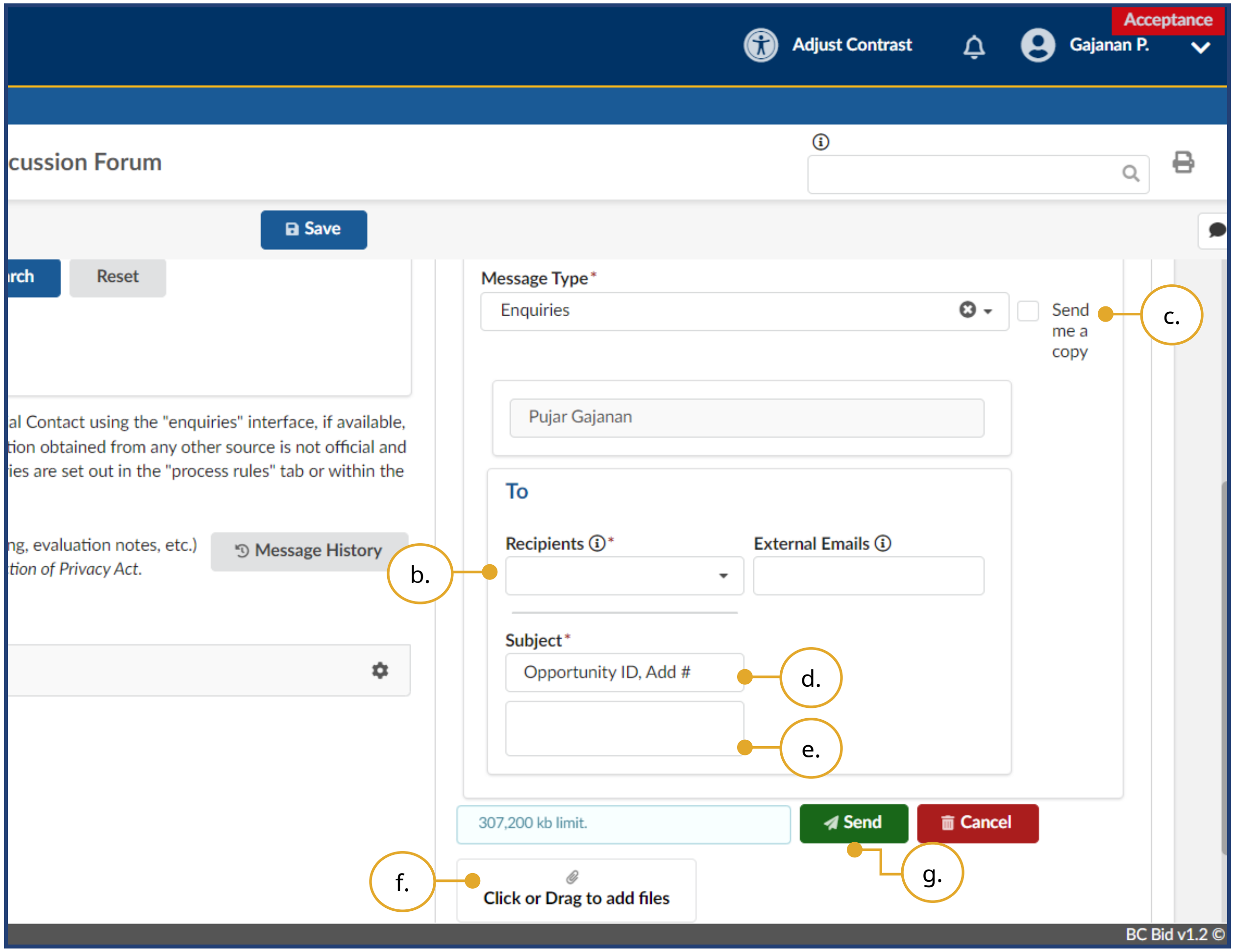
41. To create an Addendum, click **Discussion Forum** in the left-hand menu.

    Note: Keep "Public Portal" selected in the list of recipients to publish on the Addenda tab. Please refer to your Training Guide for more information.

a. Click **Compose**.

    Note: If the Official Contact, issuing organization, Closing Date & Time, Main Commodity, Other Commodity, or Opening Date & Time of Unverified Bids is changed, Buyers should notify the invited Suppliers or public through an Addendum.

[Issuing Addendum]



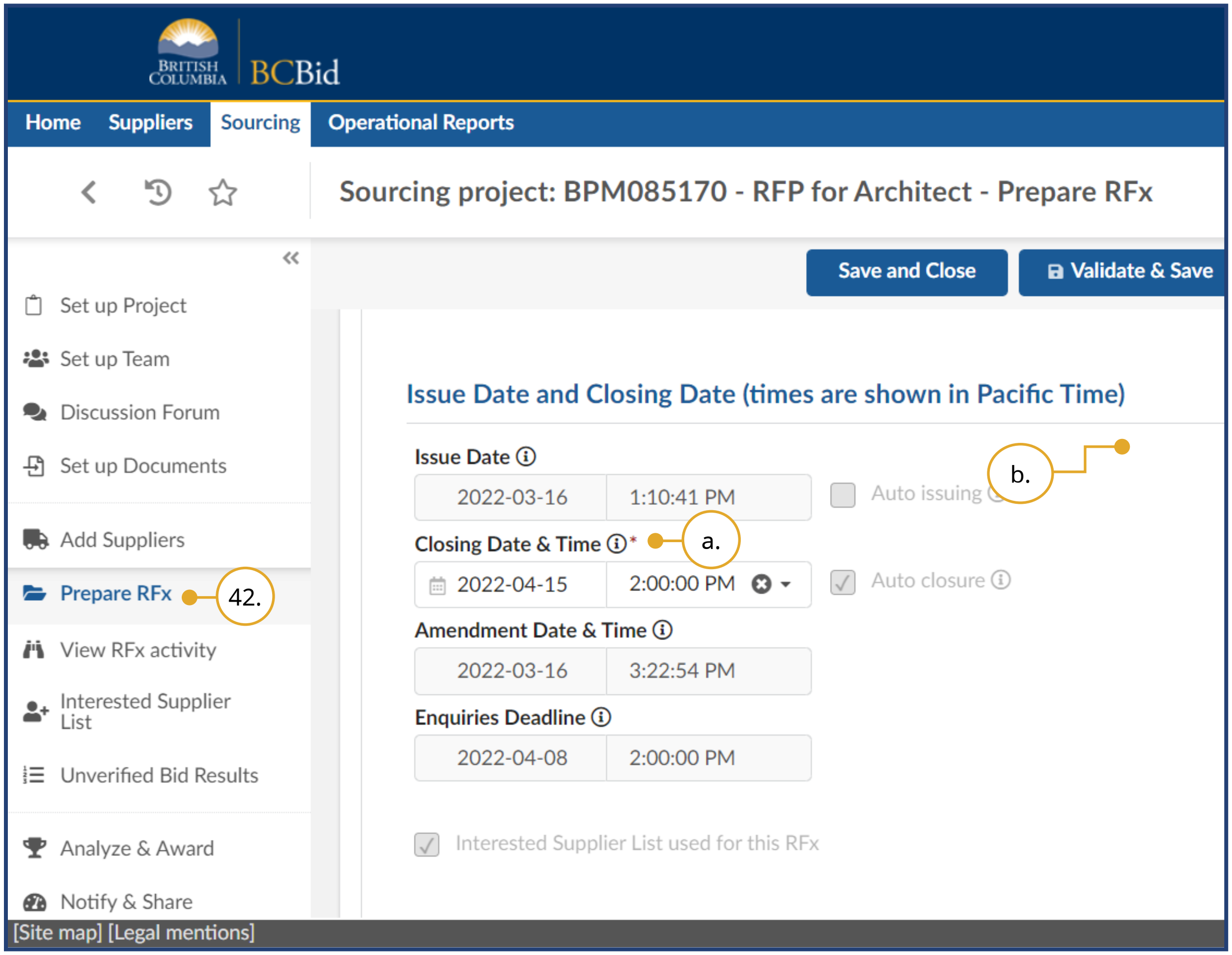
b. Under the **To** section, in the **Recipients** drop-down list, select **Public Portal** for publicly posted opportunities, or **All Invited Suppliers** for opportunities that are limited to specific suppliers. For the addenda to be visible to all team members, also add **All Internal Team Members.**
c. *Optional*: Select the **Send me a copy** checkbox to receive a copy of the notification.
d. Enter the **Subject** in the following format: [Opportunity ID, Addendum # X]
e. Enter a message in the message text box.
f. Click the **Click or Drag to add files** button to attach documents.
g. Click **Send**.

Note: Documents linked to the enquiries are not visible in the email notifications that are sent. You will have to log in to view and download them or use the

Suppliers will receive notification on an addendum if they have selected the **Start Submission** button and the message is sent to **All Invited Suppliers**.

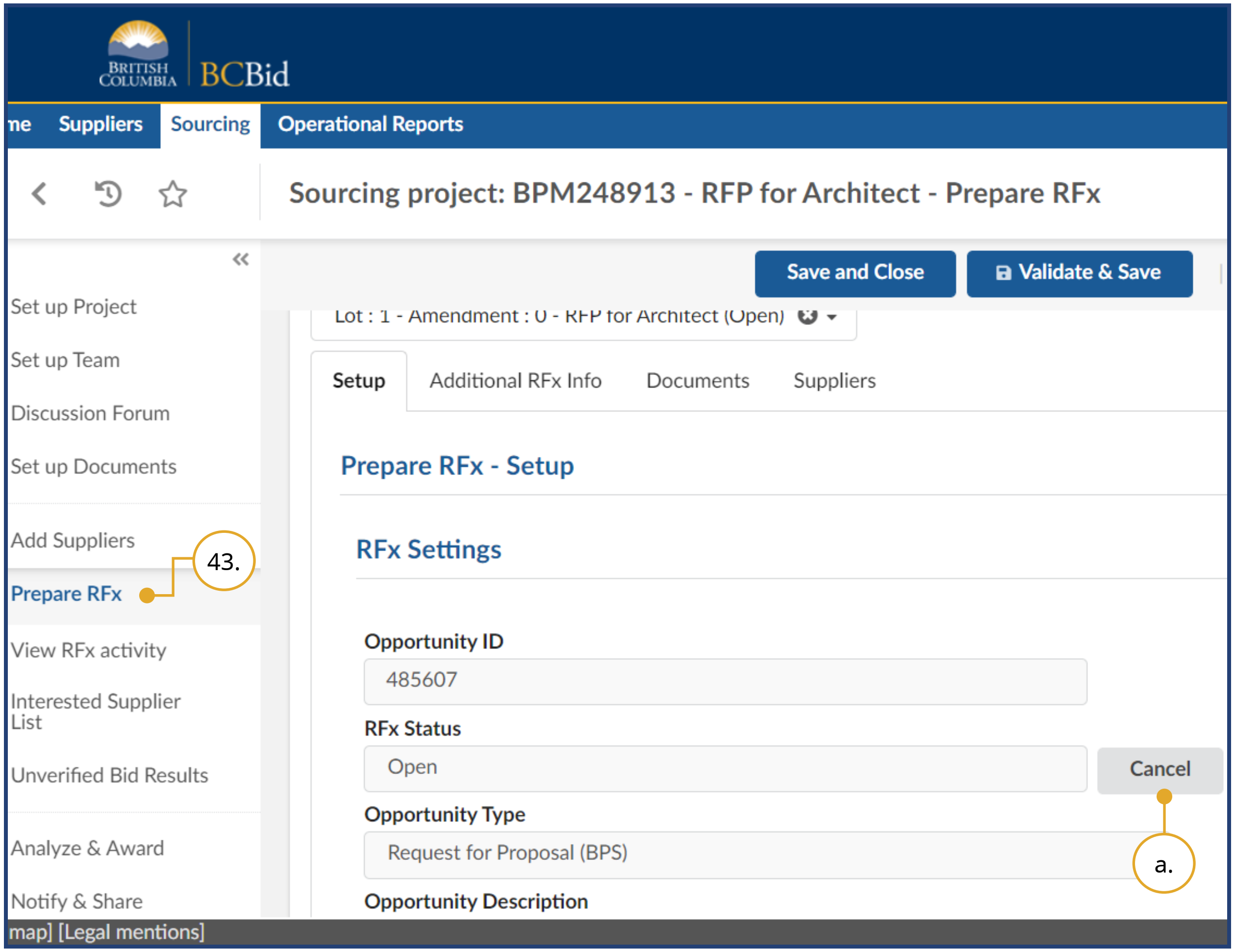
Changes to Closing Date & Time

Changes to the Closing Date & Time do not require an Amendment but must have an Addendum issued to notify Suppliers of the change.



42. In the left-hand menu, click **Prepare RFx**.
   a. In the Setup tab, update the **Closing Date & Time**.
      Optional: At this time enquiries deadline can also be changed without creating a new amendment.
   b. Click **Validate & Save**.
   c. Proceed with creating an Addendum to notify Suppliers of the change. See [Creating an Addendum](#) section for additional information.

Cancel an Open Opportunity



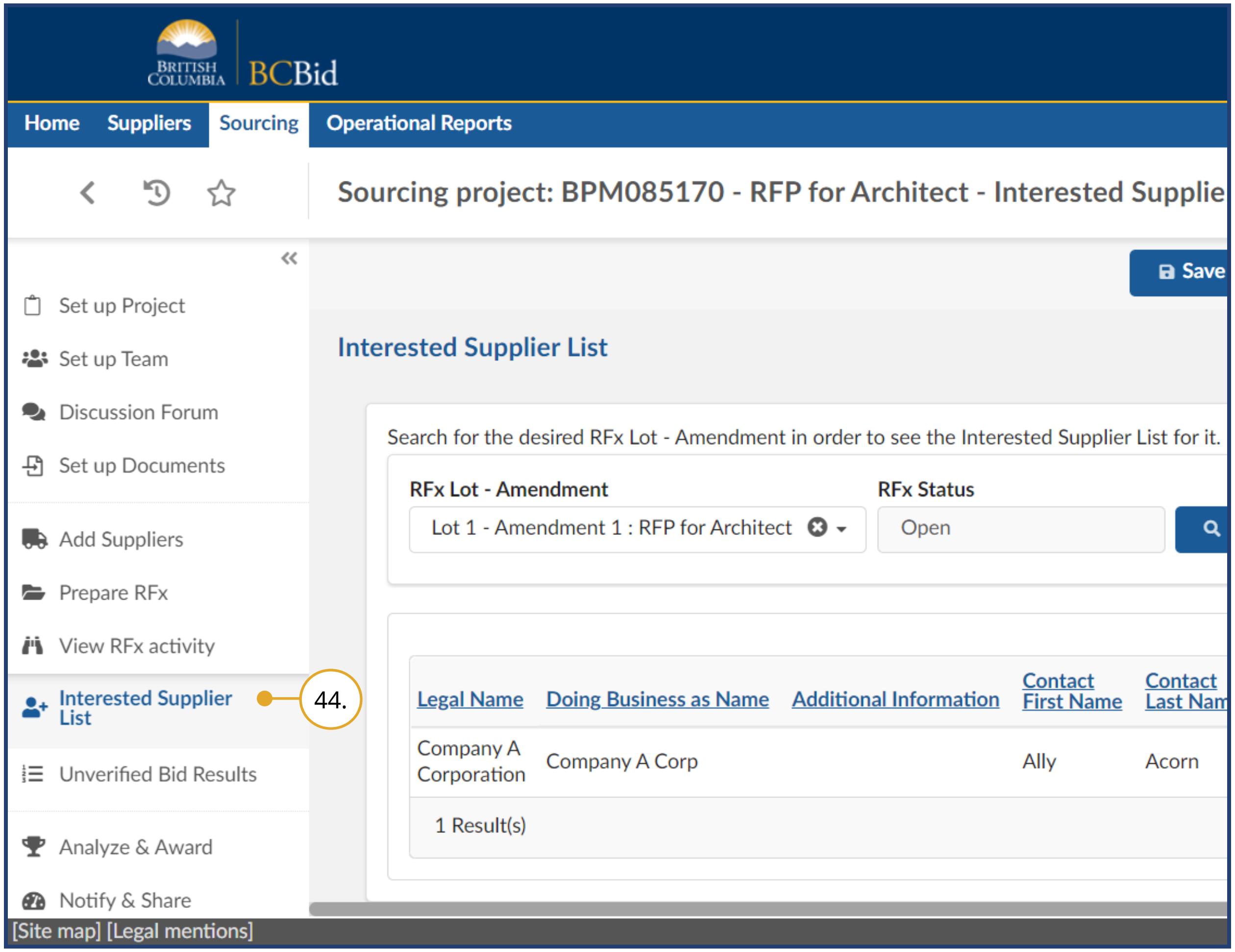
43. *Optional*: In the left-hand menu, click **Prepare RFx**.

a. In the Setup tab, click the **Cancel** button.

b. Then click **OK**.

If the deletion of an opportunity needs to be reversed contact BC Bid Help Desk.

Interested Supplier List

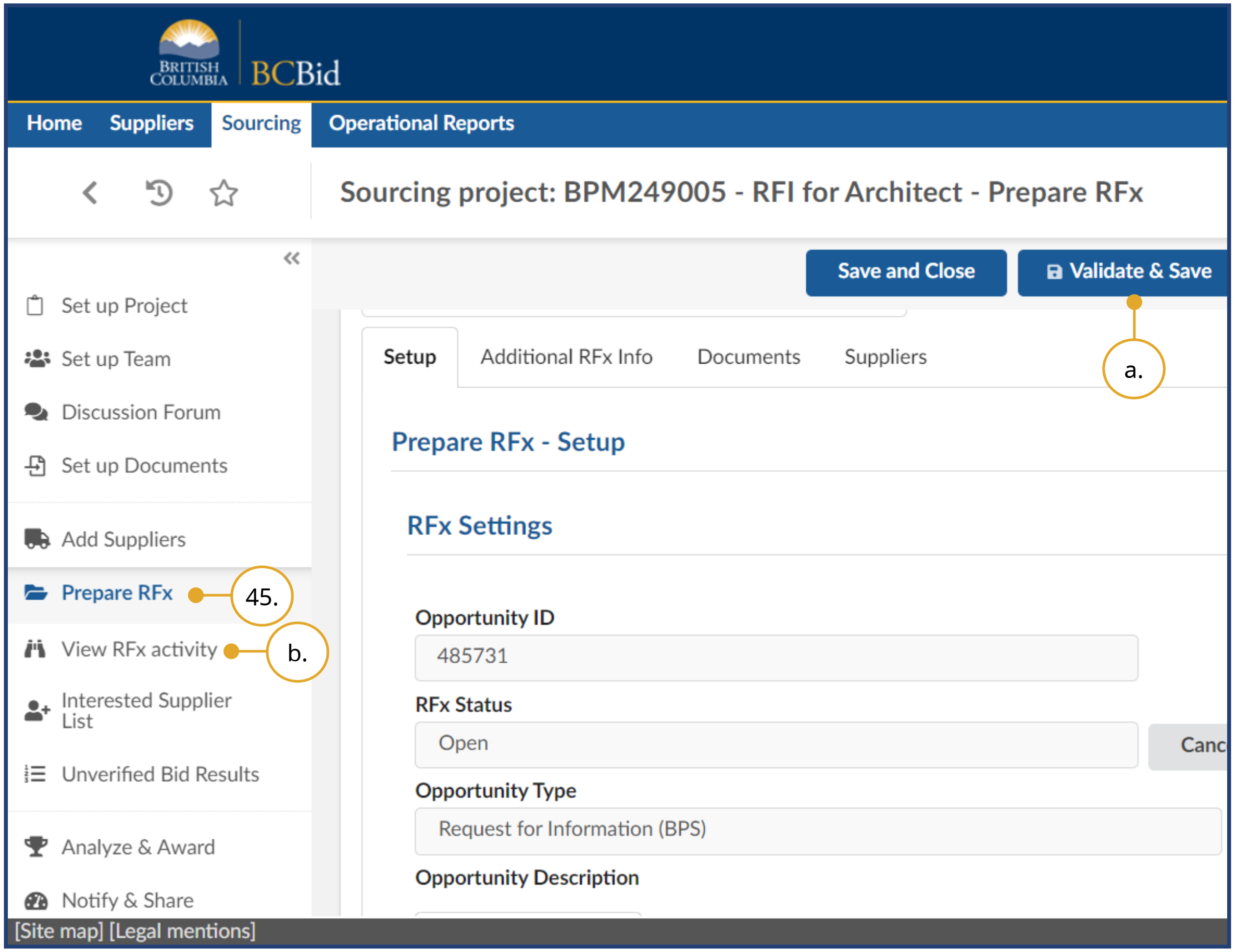


44. *Optional*: In the left-hand menu, click **Interested Supplier List** to review the list of Suppliers who have joined the list of public-facing interested Suppliers for the opportunity.

Note: This step is applicable only if the Interested Supplier List used for this RFx checkbox was checked in the Setup tab. It is not mandatory for the Suppliers to join the Interested Supplier List.

[Viewing Interested Supplier List]

Upload Submissions to Open Opportunities



45. *Optional*: To upload a Submission received by hard-copy or email for open opportunities, such as the Request for Information, add the Supplier in **Add Suppliers** menu and click **Save**.

a. Navigate to **Prepare RFx** menu and click **Validate & Save**.

b. In the **View RFx activity** menu upload the Submission by completing the steps identified in Uploading Submissions.

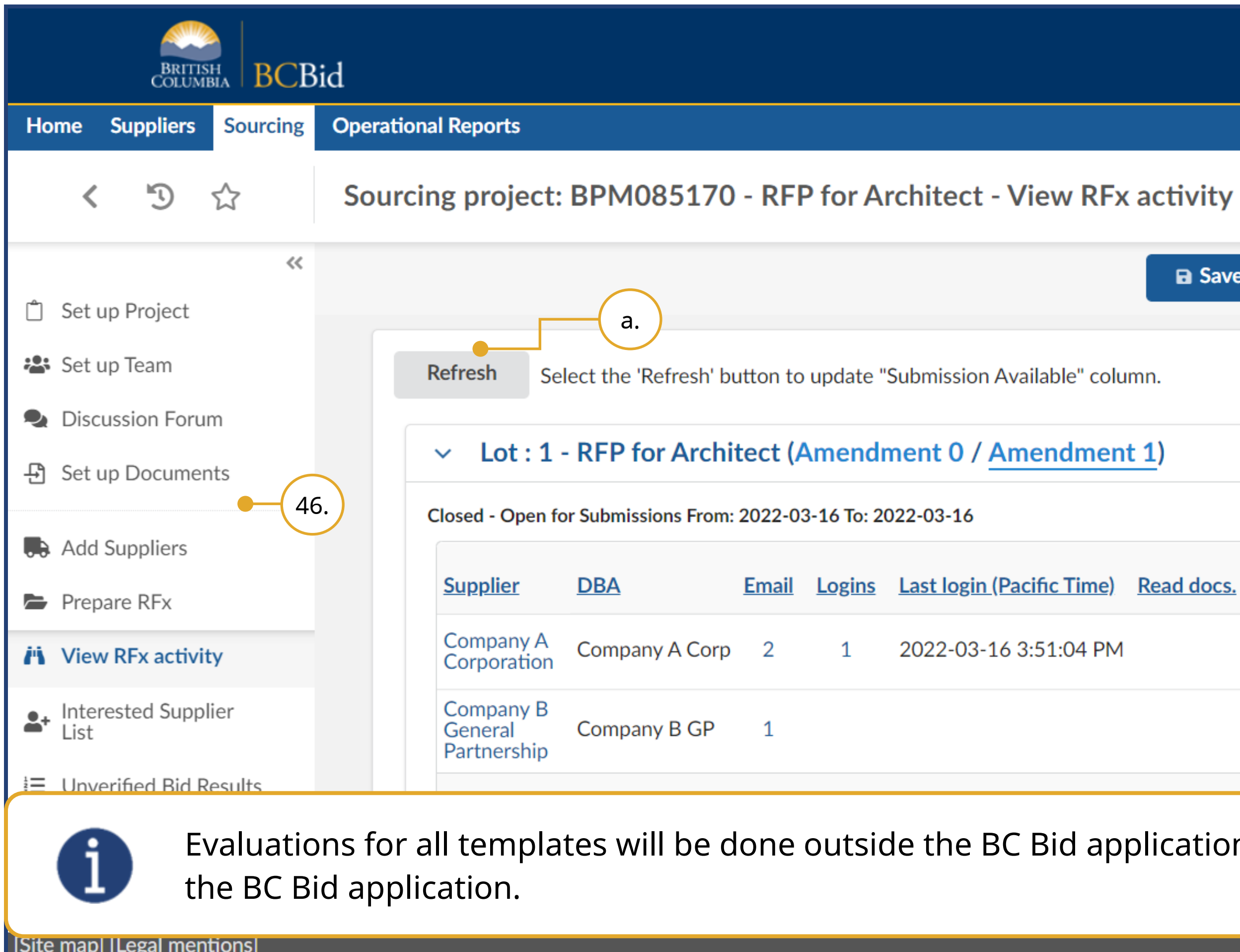
Note: If the Validate & Save button is not selected "NA" will appear in the View RFx activity menu.

Note: When adding suppliers, Shell Suppliers are marked with [SHELL (Unregistered) Supplier].

Upload Submissions to open opportunities step is applicable if the Sealed Submissions checkbox in Setup tab was deselected before issuing the opportunity.

Step 5 – Opportunity Close

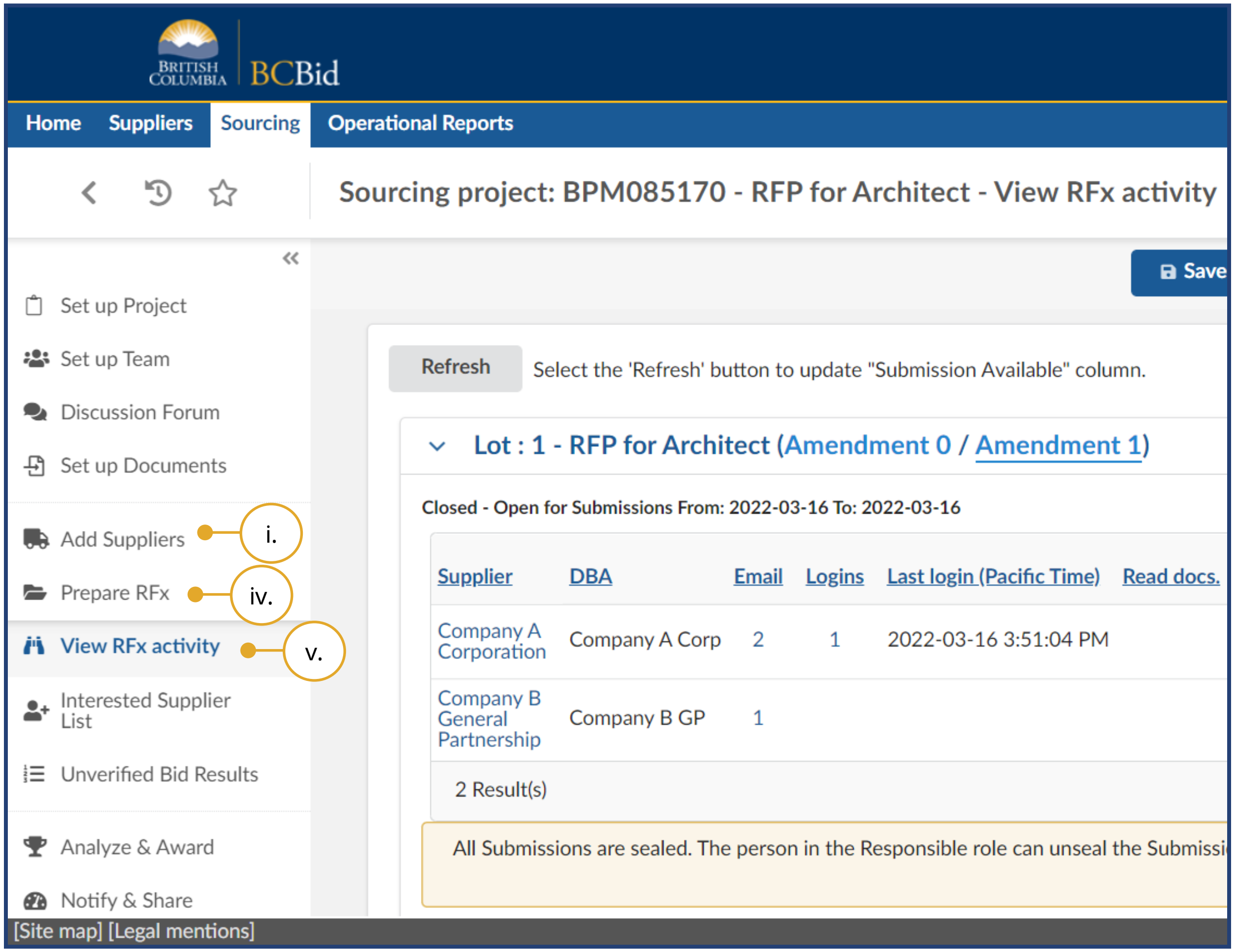
View Submissions



46. In the left-hand menu, click **View RFx activity** to review the received Submissions.
   a. Click **Refresh** to update the Submission Available column to see which of the listed Suppliers have submitted Submissions.

   Note: The Refresh button works once an opportunity is 'Open', if the Submissions are not sealed. The Refresh button only works once the opportunity has closed for Submissions that are sealed.

Evaluations for all templates will be done outside the BC Bid application but the results can be captured in the BC Bid application.



Ensure that all Submissions not submitted through the BC Bid application have been entered before BC Bid electronic Submissions are unsealed. Once BC Bid electronic Submissions are unsealed, Submissions not submitted through BC Bid application cannot be added.

b. To add a Submission for a Supplier not listed:

   i. Click **Add Suppliers**.

ii. Search for the Supplier and then add the Supplier.

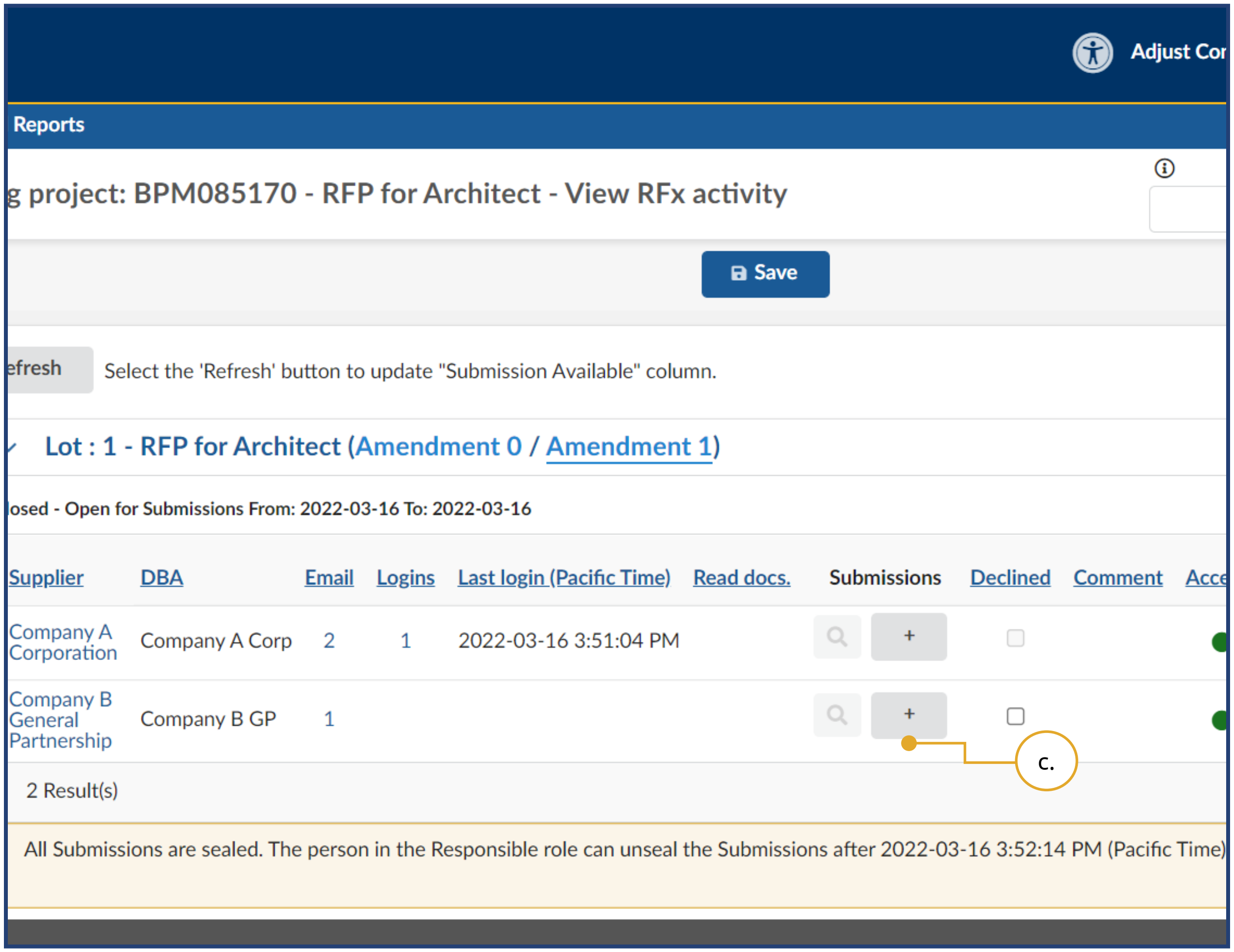
iii. Click **Save**.

iv. If the Sealed Submissions checkbox in Setup tab was deselected before issuing the opportunity, click **Prepare RFx** menu and then click **Validate & Save**.

v. Return to the **View RFx activity** menu to start entering Submissions not submitted through BC Bid application.

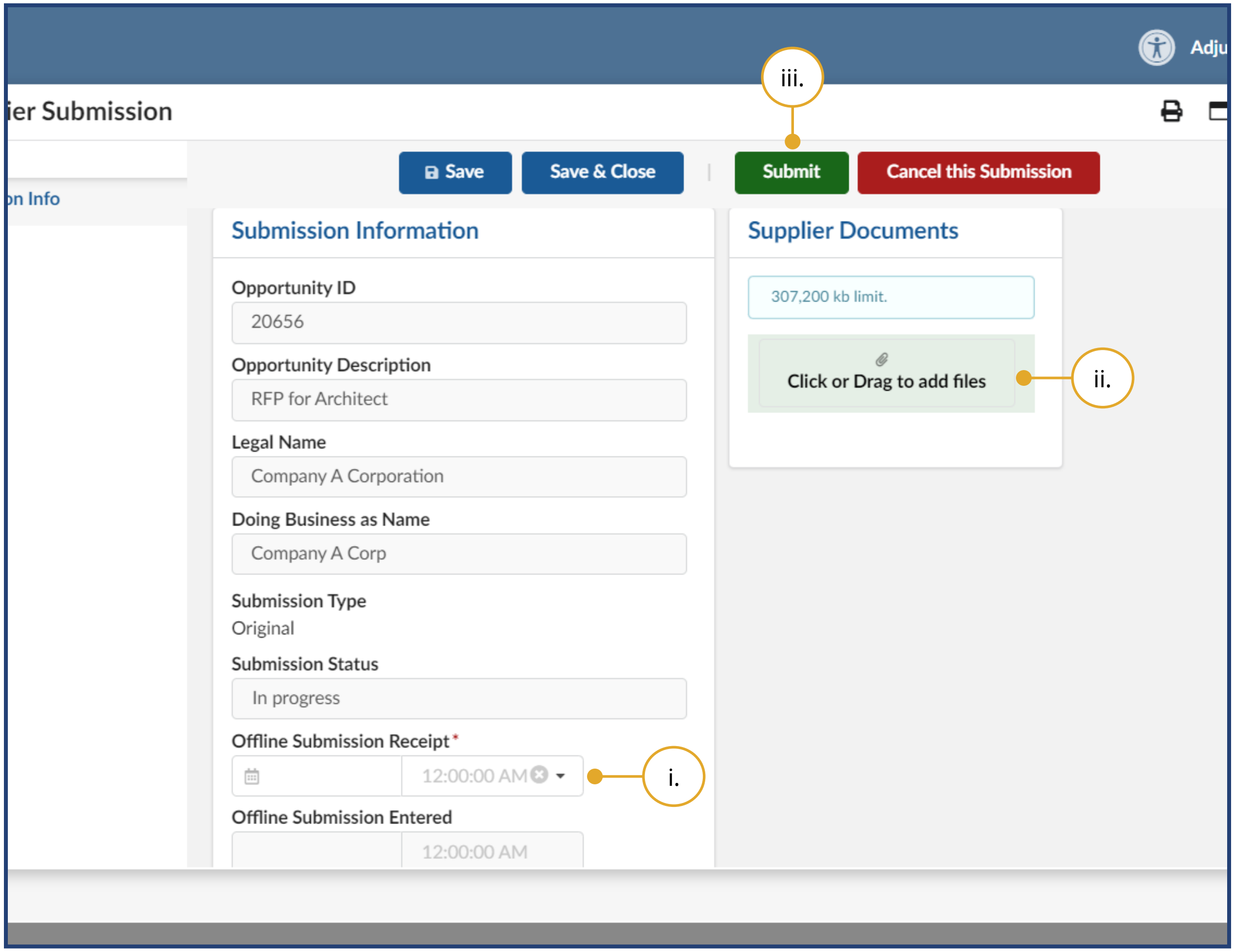
Uploading Submissions

Submissions that are only to be viewed after Closing Date and Time, are uploaded after the opportunity is closed.

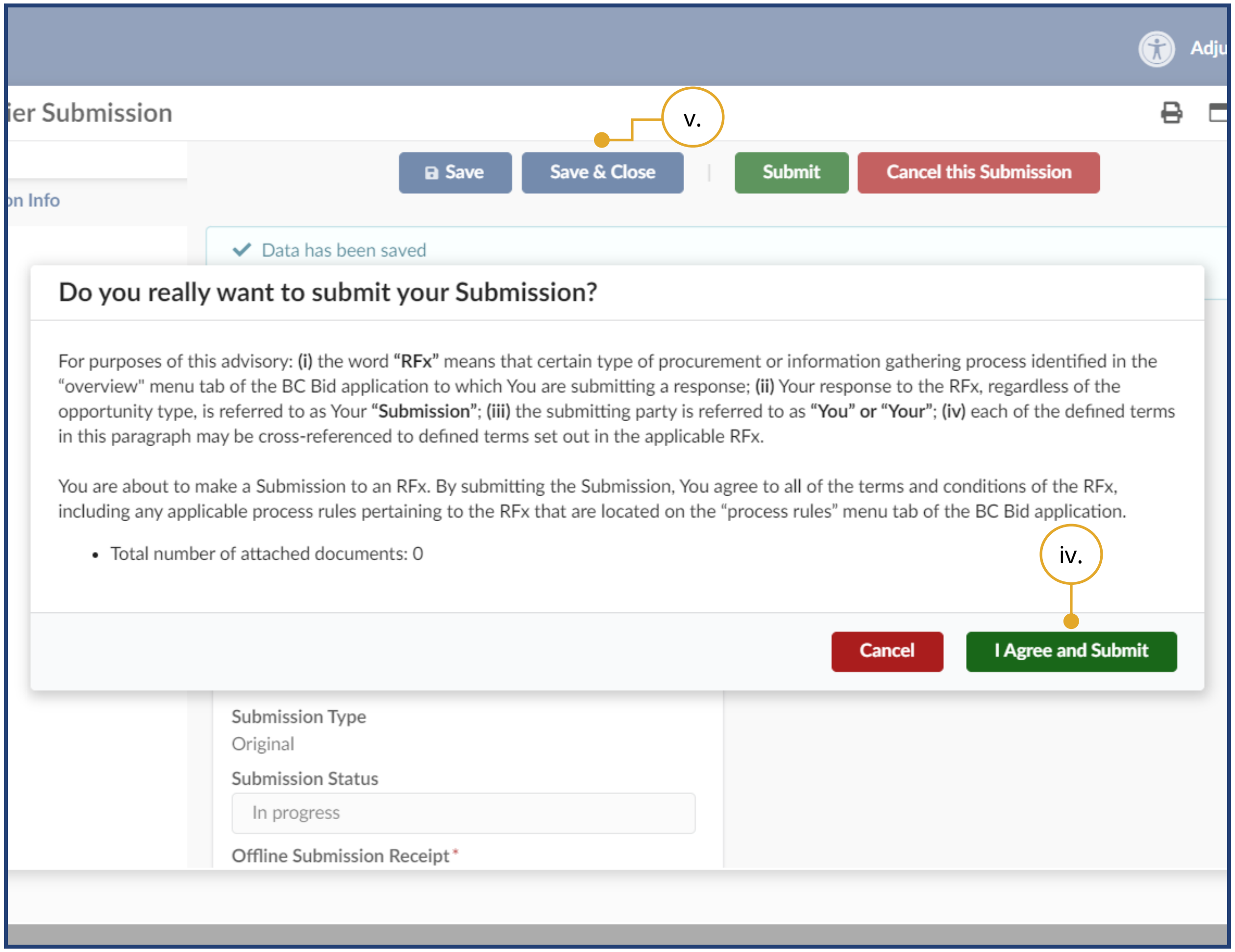


c. In the Submissions column, click the **+** button to manually add a Submission not submitted through BC Bid application.

[Uploading Submissions]

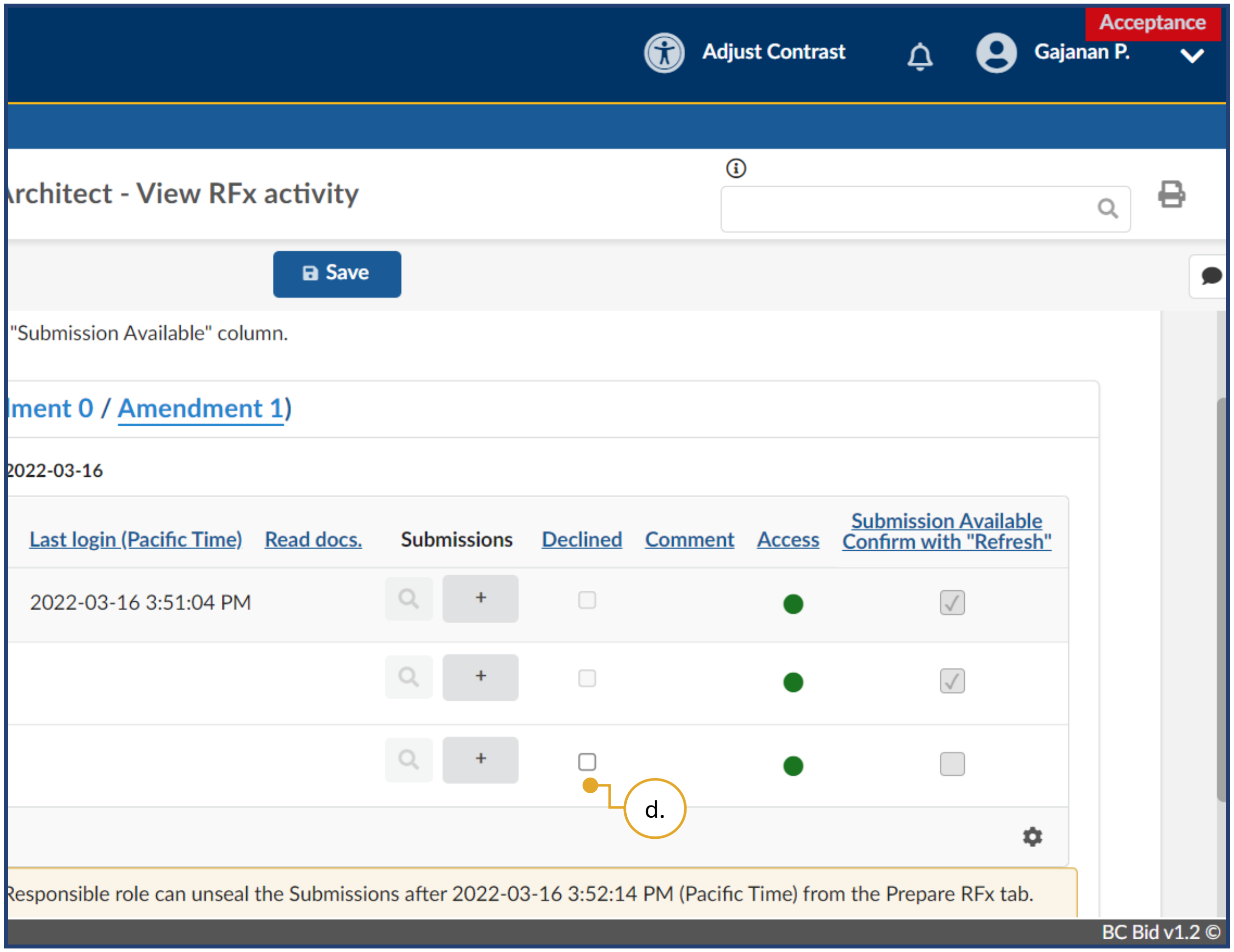


i. In the Supplier Submission dialog box, select the **Offline Submission Receipt** date and time.
ii. *Optional*: Upload the Submission by clicking **Click or Drag to add files** button or directly dragging and dropping files onto the button.
   Note: document count field will detail the number of documents attached to the submission
iii. Click **Submit**.



iv. Review the dialog box and click **I Agree and Submit**.
Note: As a Buyer you are not agreeing to this dialog box advisory. It is a step required to upload a Submission into the BC Bid application for creation of the contract award notice within your opportunity.

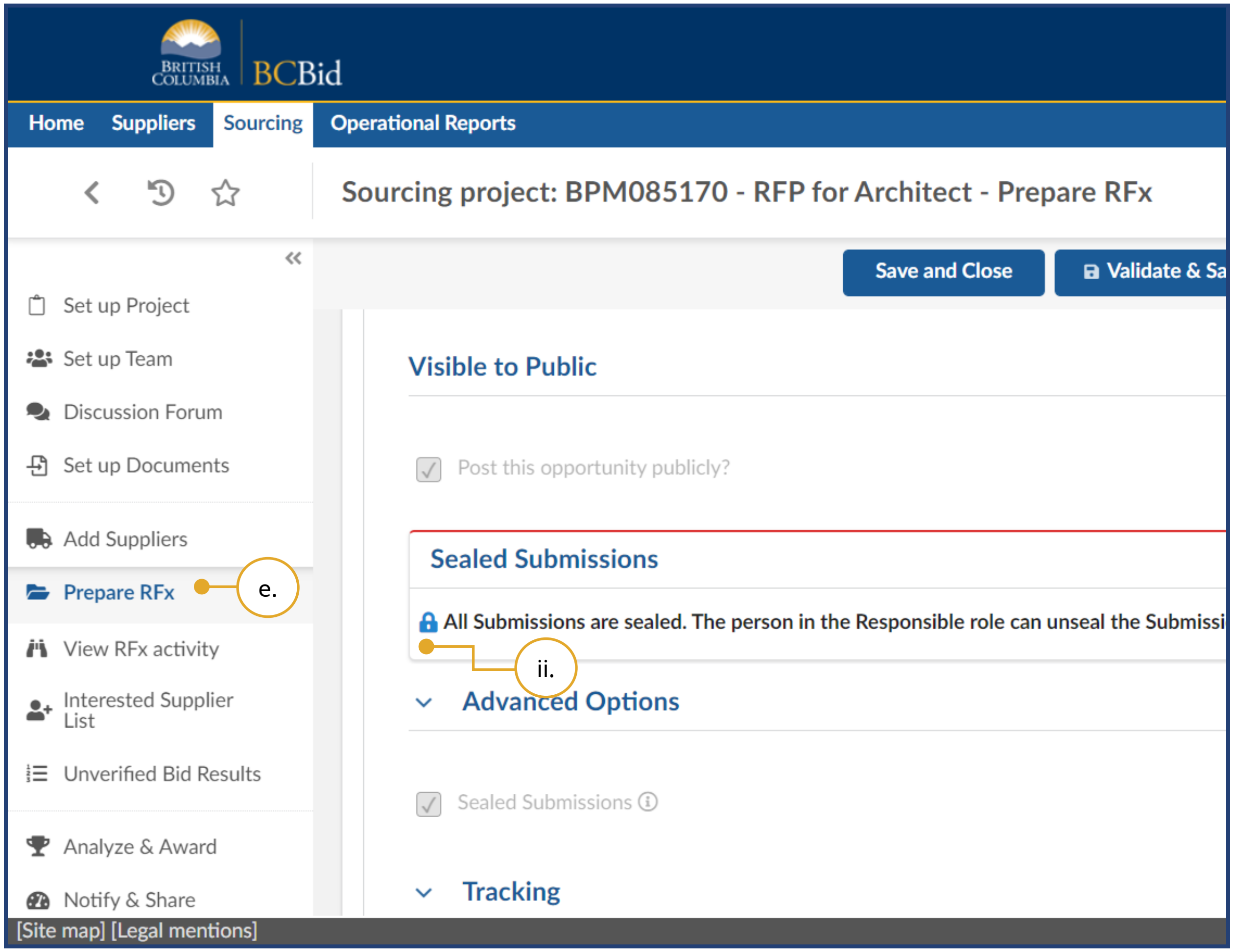
v. Click **Save & Close**.



d. *Optional*: Select the **Declined** checkbox to track all invited Suppliers who did not provide a Submission.

Unsealing and Downloading Submissions

Before unsealing Submissions ensure that all Submissions not submitted through the BC Bid application have been uploaded to the opportunity.



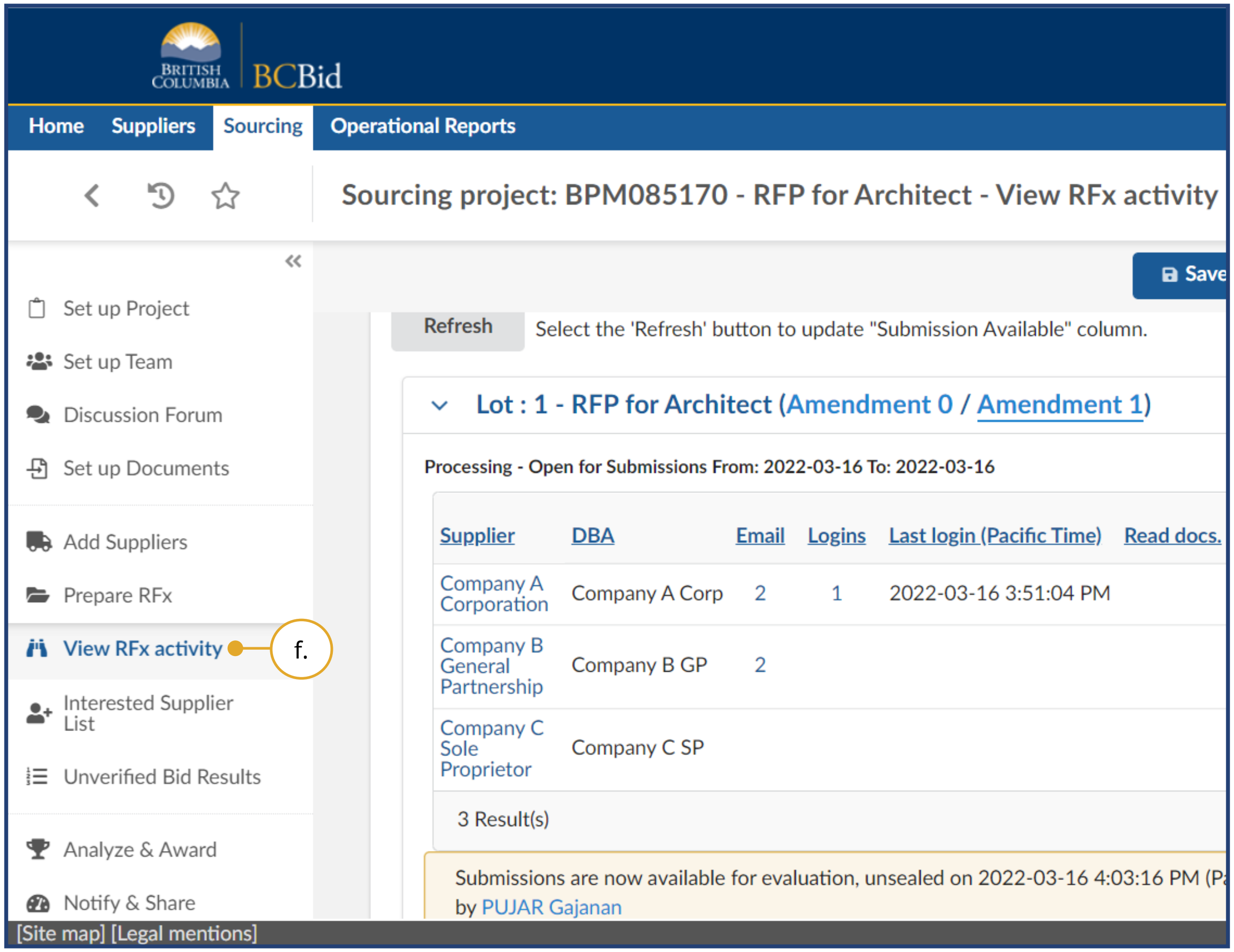
e. In the left-hand menu, click **Prepare RFx**.

Note: This step is applicable only if the Sealed Submissions checkbox was selected in the Setup tab.

i. On the **Setup** tab, scroll down to Sealed Submissions.
ii. In the Sealed Submissions section, as the user with the Responsible role, click the **padlock** icon to unseal the Submissions and then click **OK**.

Note: A pop-up will display before unsealing submissions with the following:

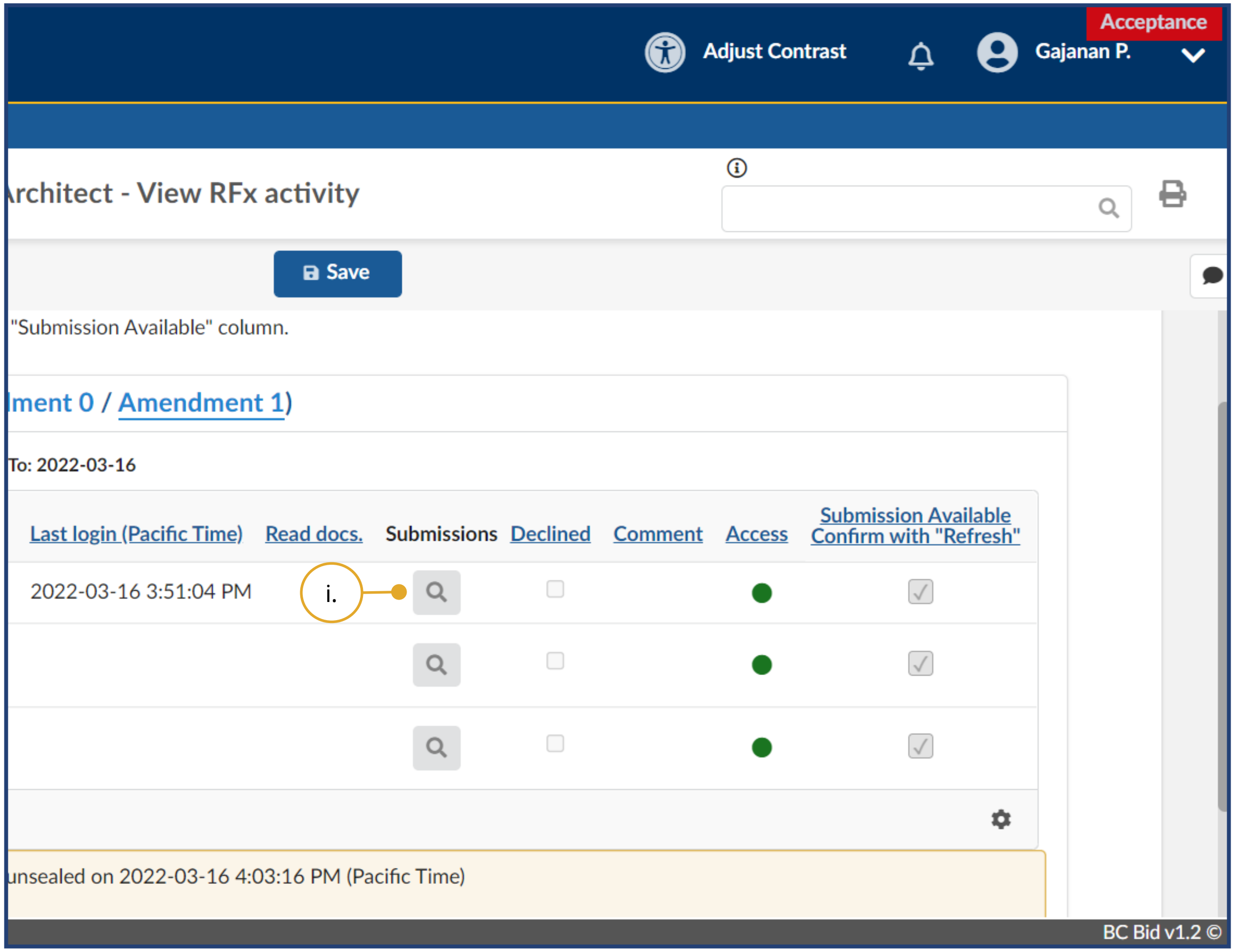
'Have you uploaded ALL offline Submissions into BC Bid?



If not, click CANCEL. If you click OK, you will no longer be able to upload offline Submissions. Once unsealed, offline Submissions cannot be uploaded. Please refer to your Buyer Guide for full instructions.'

[Unsealing and downloading Submissions]

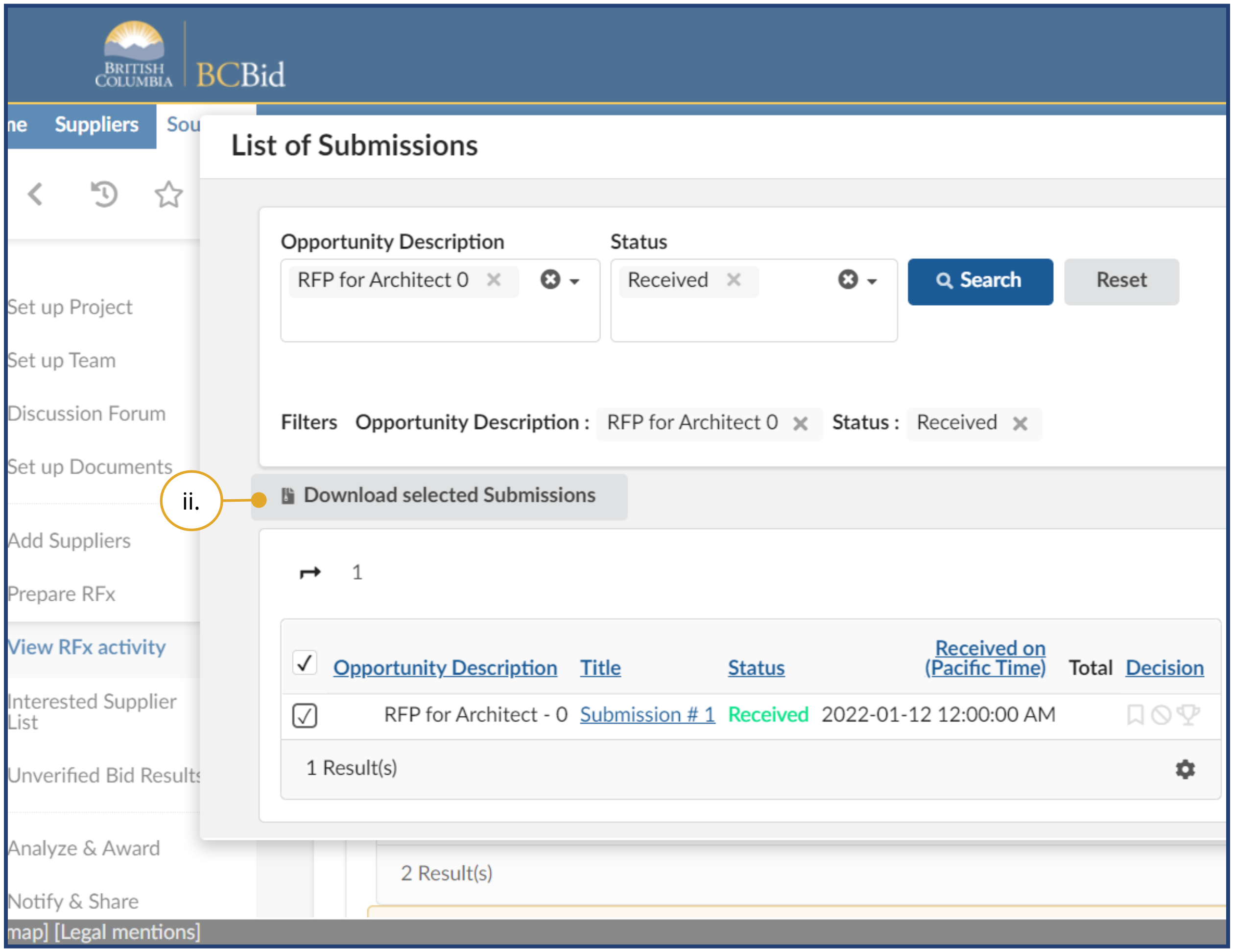
f. In the left-hand menu, click **View RFx activity**.



i. Click the **magnifying glass** icon beside each Supplier in the Submissions column to access the Submissions.

Note: To confirm if Suppliers opened all procurement documents uploaded to the Documents tab before Submission, Buyers should view the **Read docs** column. If, for example, five documents were uploaded to the Documents tab, and a Supplier opened all five documents before submitting a Submission, the Read docs column will display “5” for that Supplier.

If the **Read docs.** column is not visible, select the **cog** icon and make the 'Read docs' column visible using the toggle button.

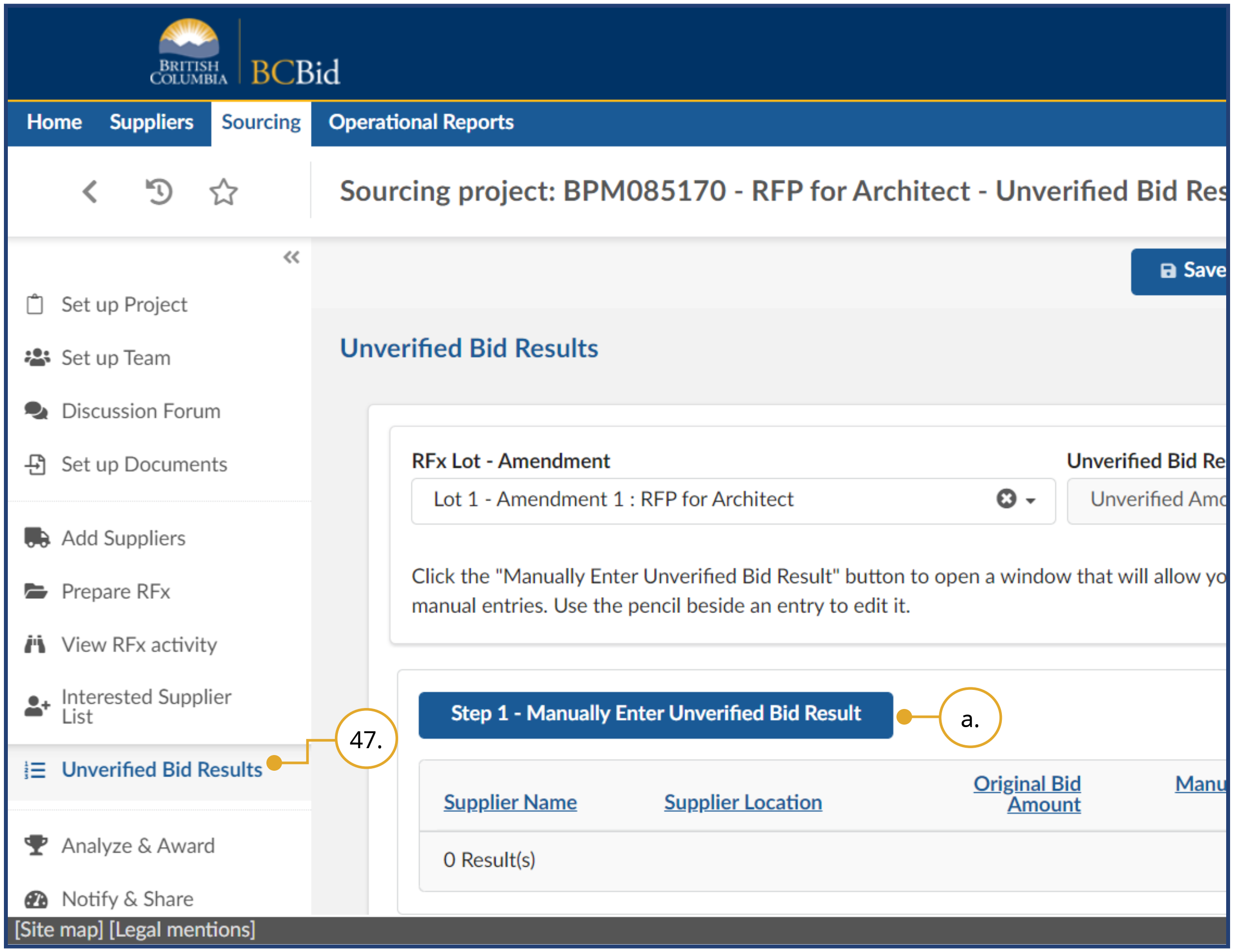


ii. Select the Submission and then click **Download selected Submissions**.

Note: If alternative Submissions are allowed, select the appropriate Submission to download it.

Zipped files generated after clicking **Download selected Submissions** will include a set of folders named after each Supplier. However, the files within each folder will not have the Supplier's name in the filename. Caution should be taken to separate the files or rename them to preserve the Supplier identification per Submission.

Unverified Bid Results

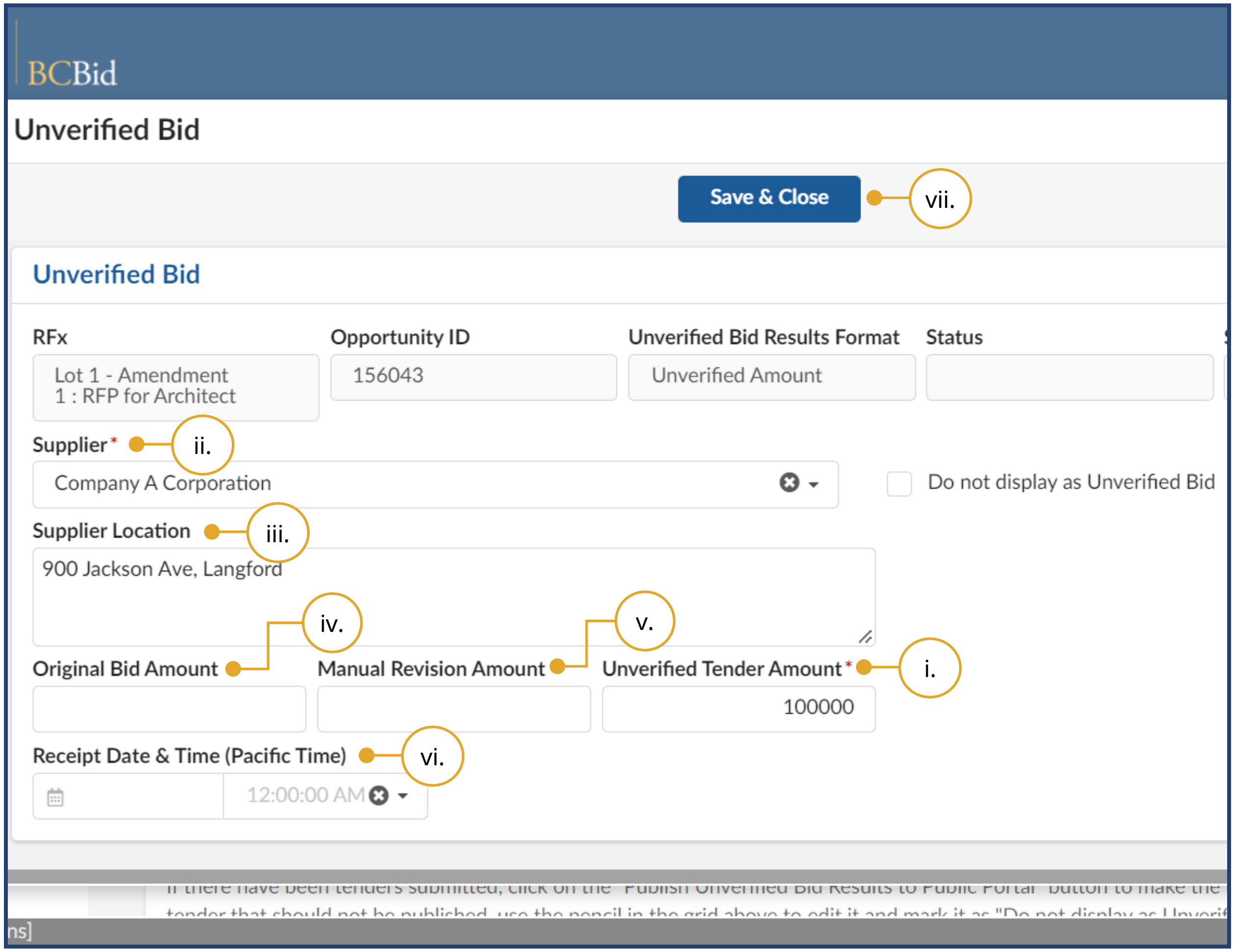


47. In the left-hand menu, click **Unverified Bid Results** to enter the bid results.

    Note: This step is applicable only if the Opening and Unverified Bids used for the RFx checkbox was selected in the Prepare RFx menu, Setup tab.

a. Click **Step 1 - Manually Enter Unverified Bid Result**.

[Unverified Bid Results]



In the dialog box, complete the following:

i. Enter the **Unverified Tender Amount**.

   Note: This field may change depending on the selection made in the Unverified Bid Results Format drop-down list in Prepare RFx – Setup tab.

ii. Select the **Supplier** from the drop down list.

iii. *Optional*: Enter the **Supplier Location**.

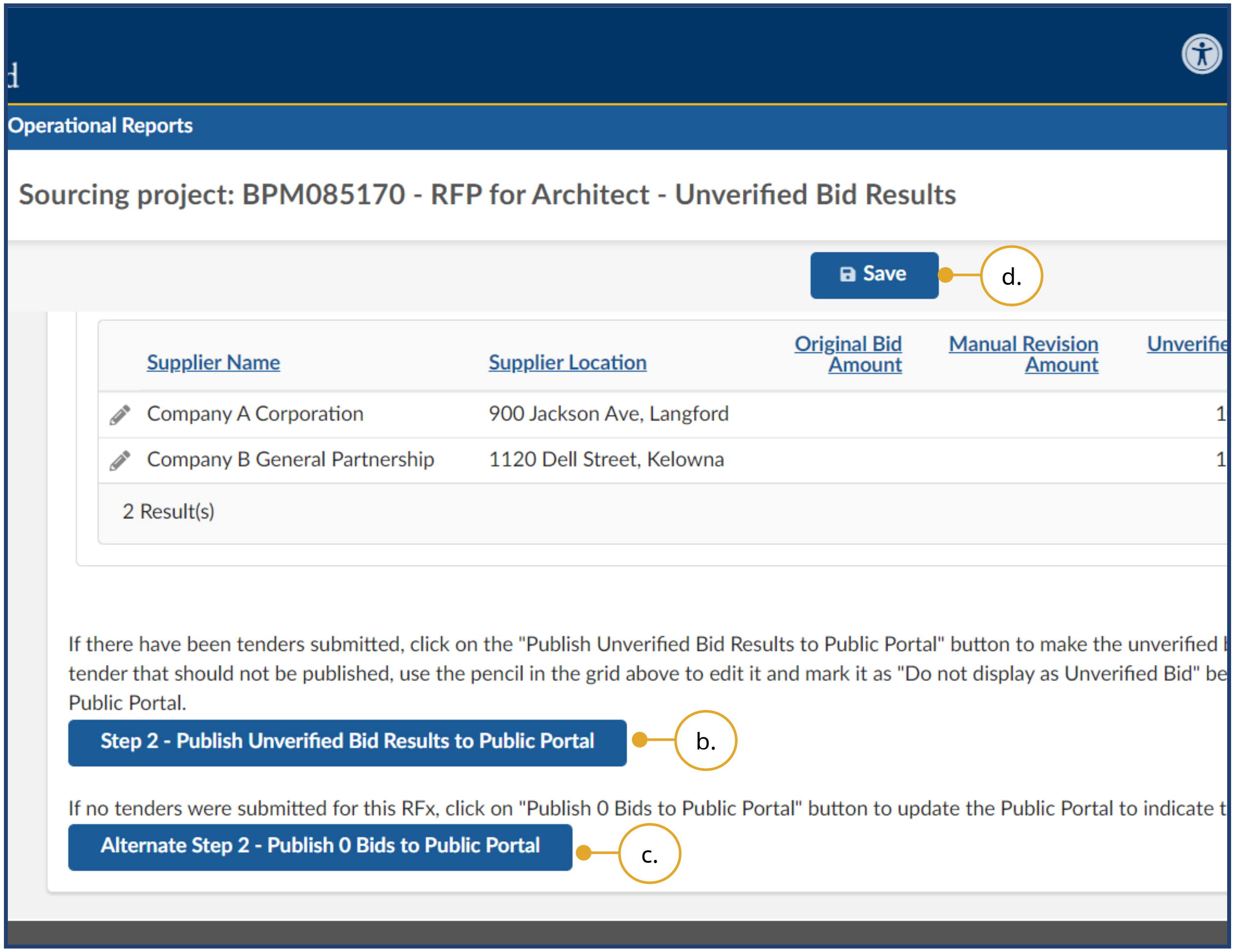
iv. *Optional*: Enter the **Original Bid Amount**

v. *Optional*: Enter the **Manual Revision Amount**.

vi. *Optional*: Select **Receipt Date & Time**.

vii. Click **Save & Close**.

The **Do not display as Unverified Bid** checkbox allows a Buyer to upload Bids that are not compliant with one or more obvious mandatory criteria. These Bids are not displayed as Unverified Bids.



b. Click **Step 2 – Publish Unverified Bid Results to Public Portal**.

   Note: The status of the bids will change to Published.

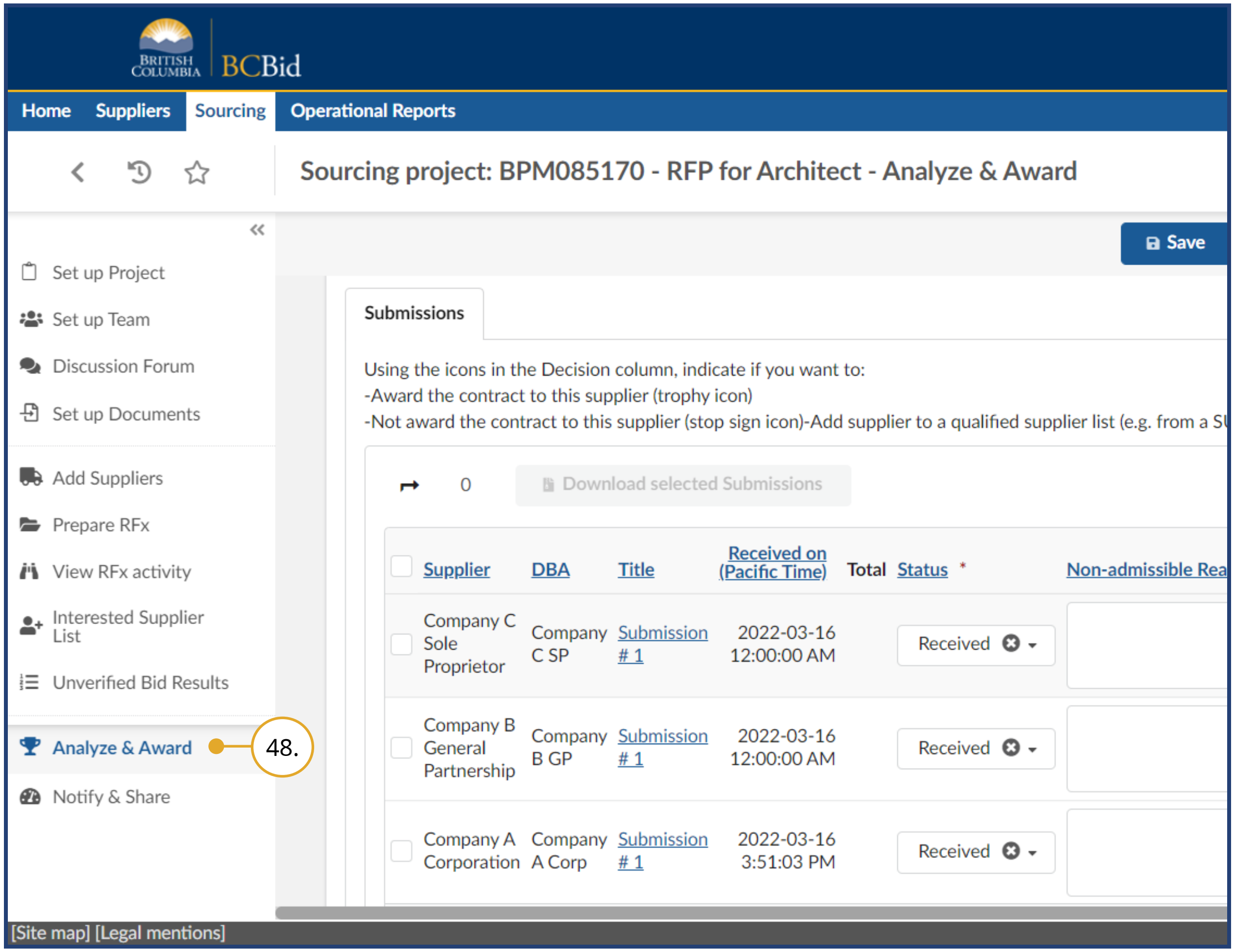
c. *Optional*: Click **Alternative Step 2 - Publish 0 Bids to Public Portal**.

   Note: This option will update the Public Dashboard to indicate that there were no bids.

d. Click **Save**.

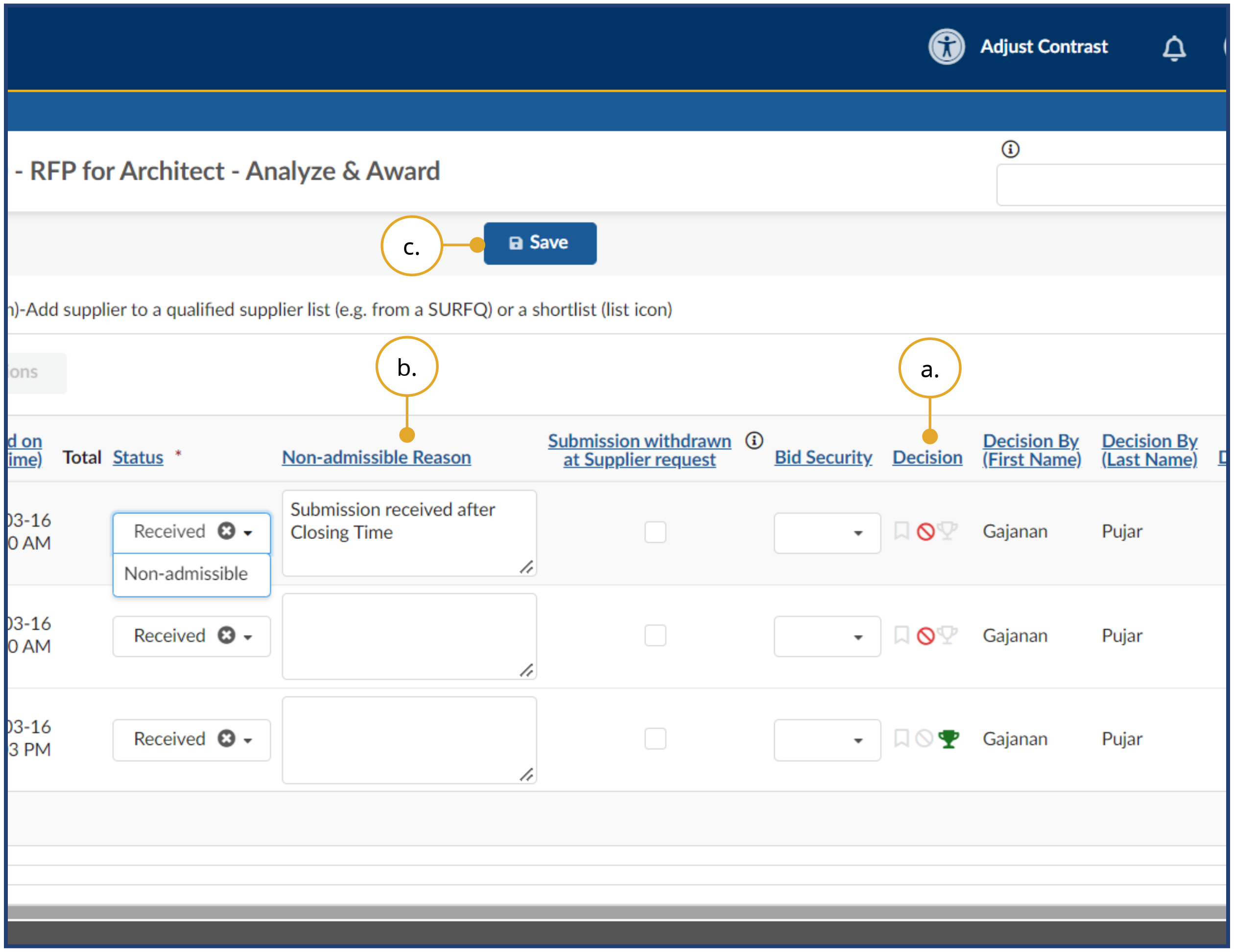
   Note: Offline submission receipt dates and times entered during the unverified bid results process will auto-populate when entering subsequent hardcopy submissions.

Step 6 – Analyze & Award



48. In the left-hand menu, click **Analyze & Award**.

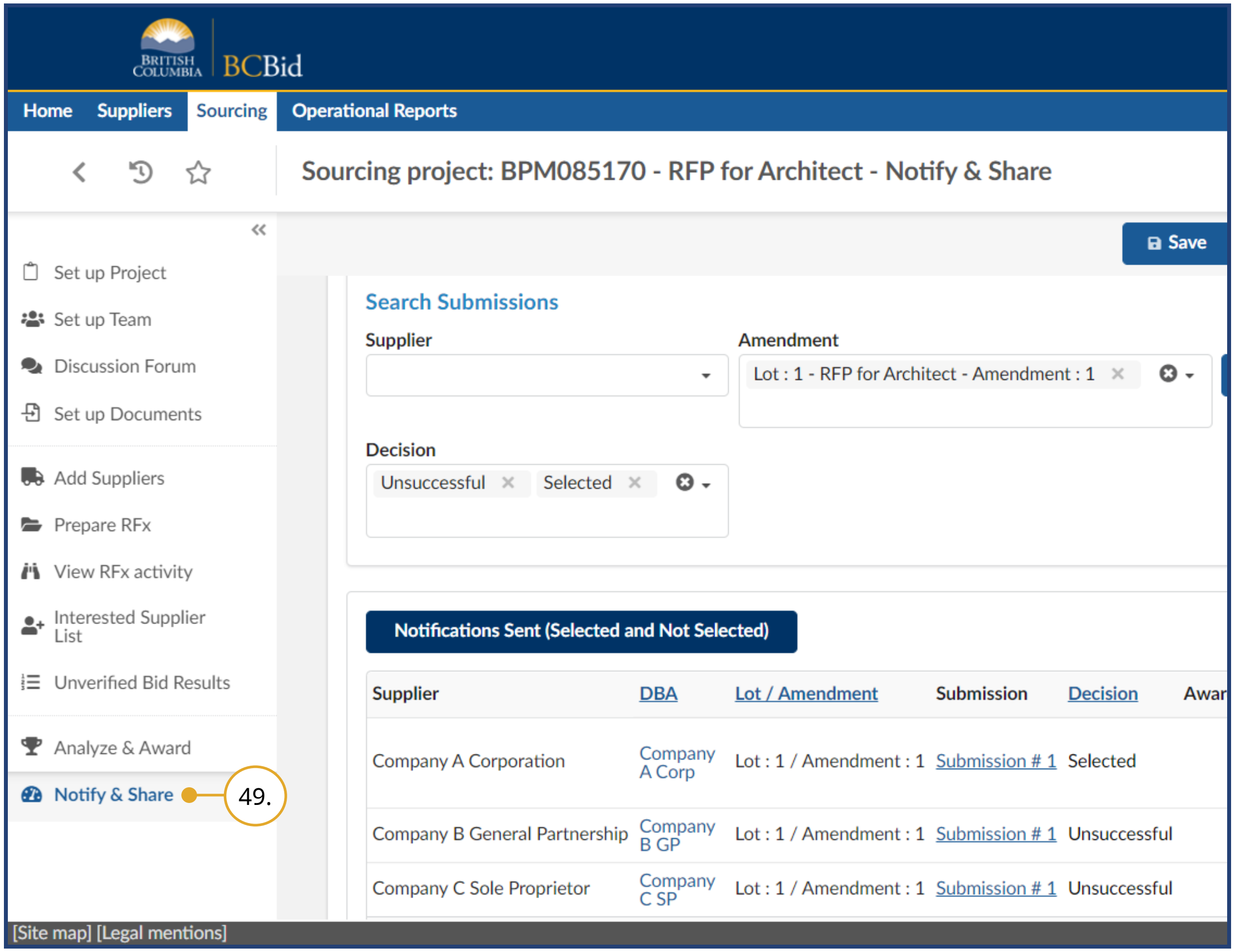
[Awarding a Contract/Shortlisting]()



a. In the Submissions tab, manually select the decision for each Submission using the appropriate icon options in the **Decision** column. The award decision (**Trophy** icon) should be selected last.
b. To reject a Submission for failing mandatory requirements, enter a **Non-admissible Reason** for the appropriate Supplier and click the **Do not award** icon in the Decision column.
c. Click **Save**.

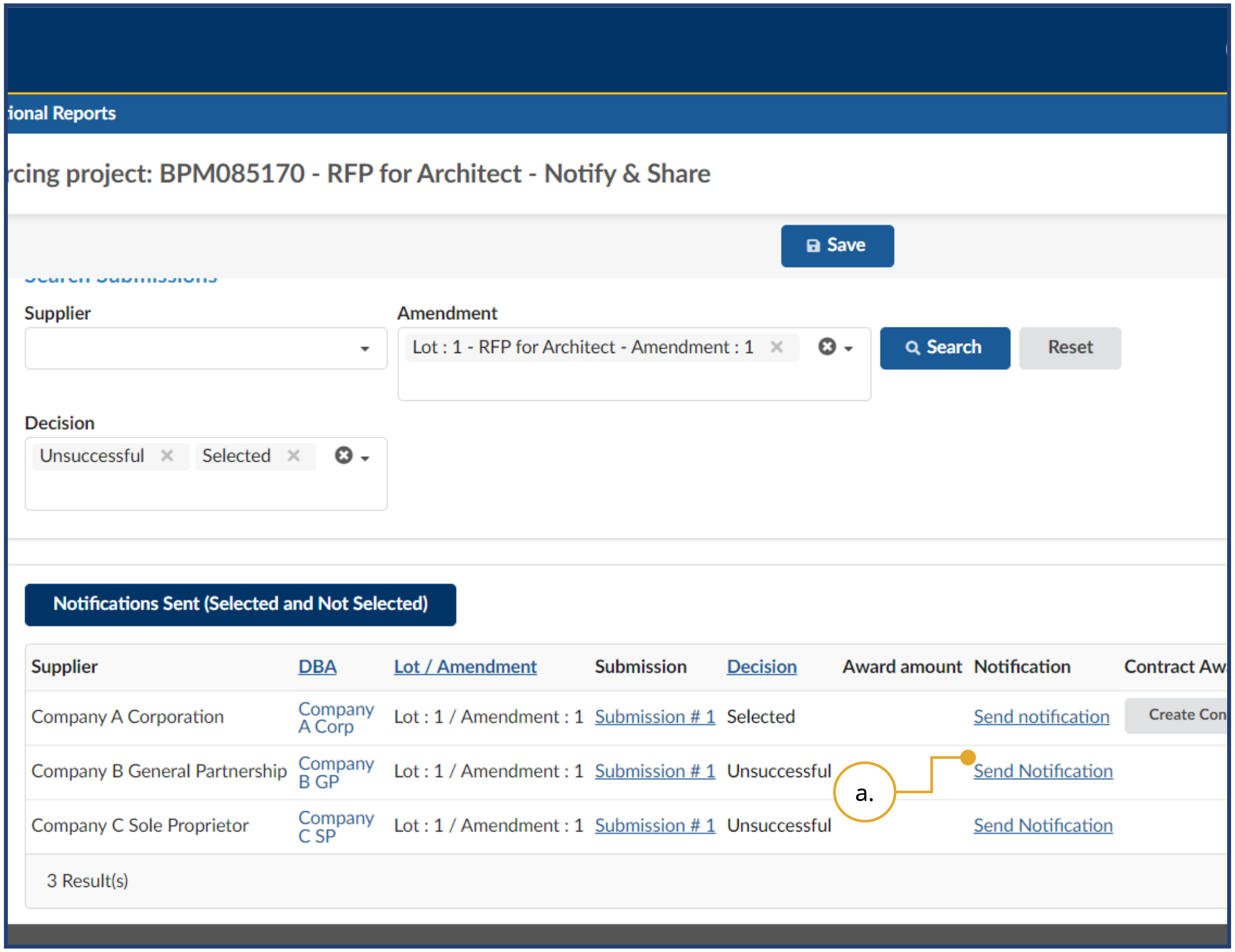
Note: Buyers can change the status of a Submission to Non-admissible by clicking **Non-admissible** in the Status drop-down list. This step must be completed after entering a **Non-admissible Reason** and all official notifications are sent to the Suppliers as Suppliers can see the updated status on their Supplier Dashboard.

Step 7 – Notify & Share



49. In the left-hand menu, click **Notify & Share** to notify all Suppliers.

Buyers can use the Search Submissions section to narrow filter by Supplier, Amendment or the Decision made in the Analyze & Award menu.

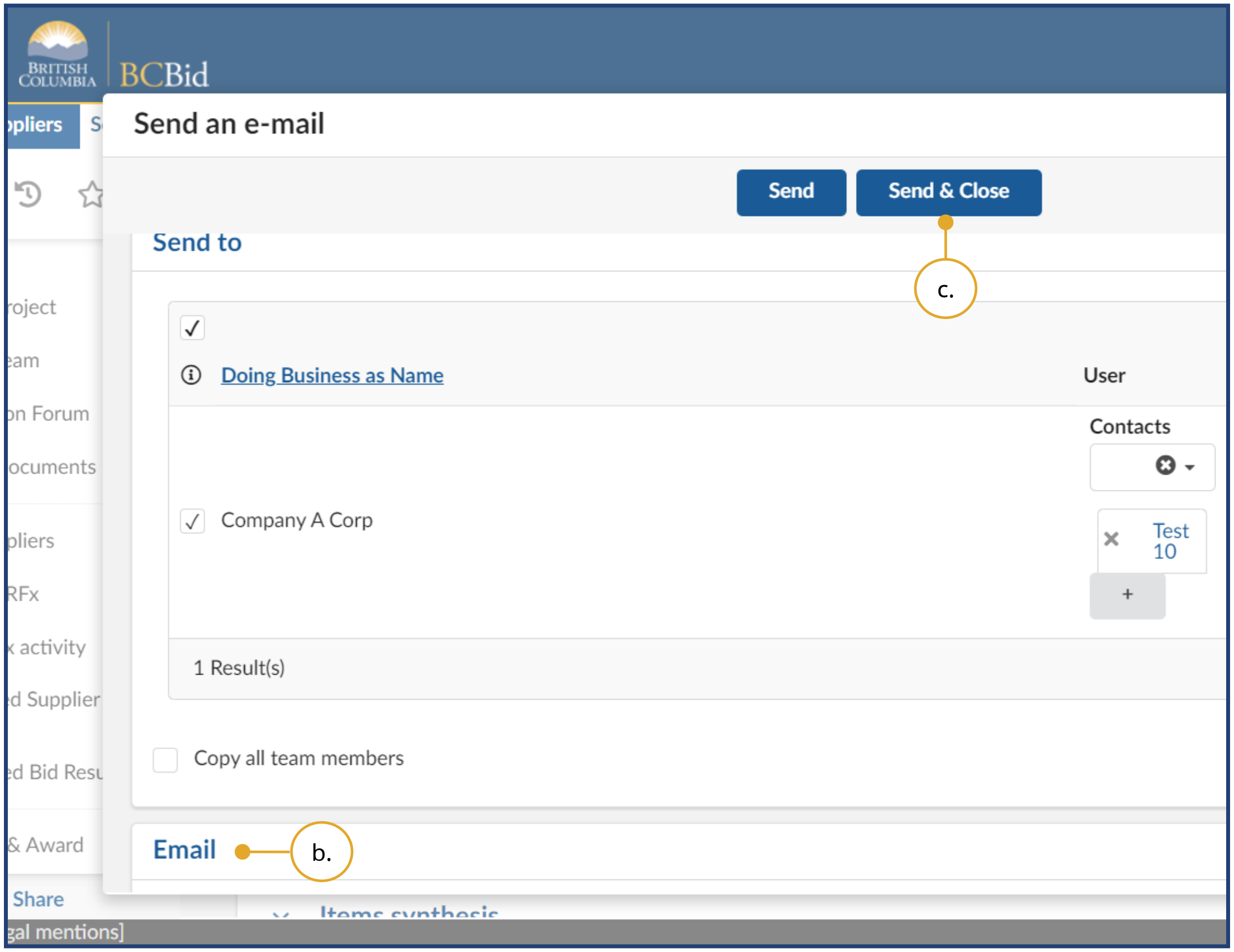


a. Click **Send notification** in the Notification column. This will open Send an e-mail dialog box.

Note: For opportunity types that involve shortlisting or qualifying Suppliers, Buyers notify the Suppliers through the Discussion Forum or a communication channel external to BC Bid application.

[Sending List Results Notification to Suppliers]

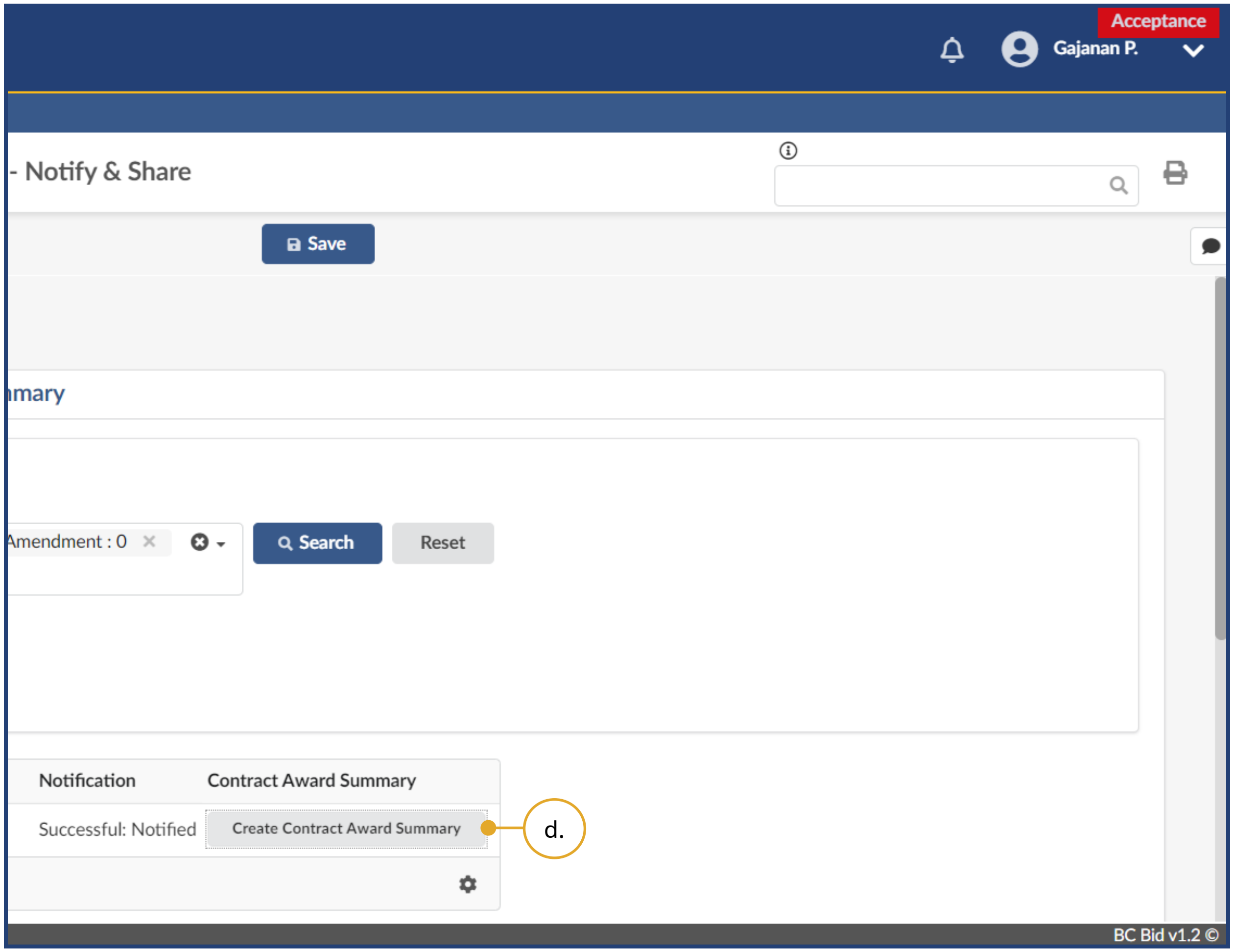
[Sending Award Results Notification to Suppliers]



b. *Optional*: In the **Email** section, the BC Bid application displays a default email template that can be edited as necessary and allows attachments to be added to the email.

c. Click **Send & Close**

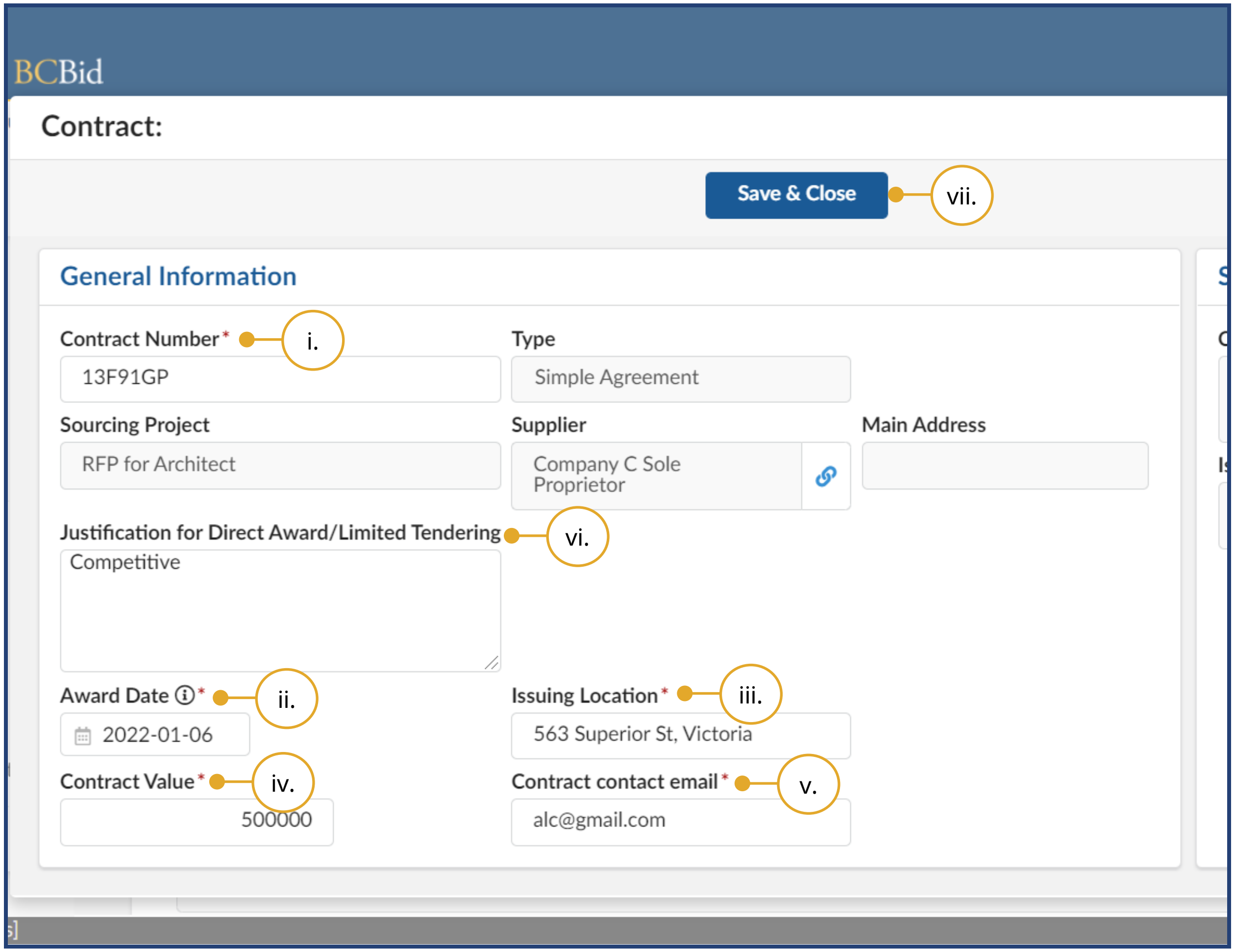
Contract Award Summary



d. Click **Create Contract Award Summary**.

Note: The contract award notice should be published, when appropriate, as soon as possible after the Contract has been signed.
If awarding multiple Contracts from a single opportunity, do not use the contract award notice within the opportunity. Use the Contract Award Notice webform. See Direct Award section for use, but include your Opportunity Type and 'competitive' for your Justification.

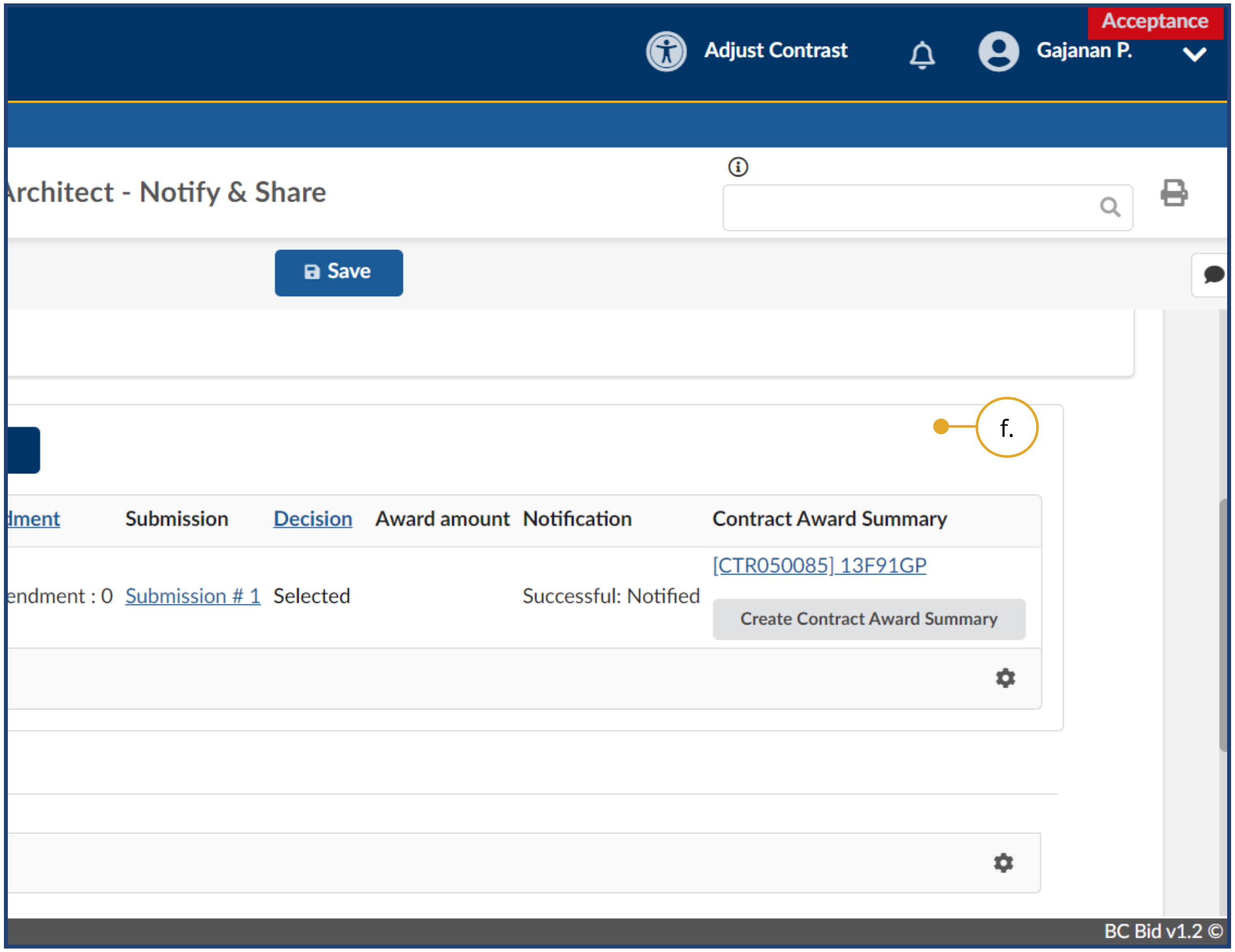
[Creating Contract Award Summary]()



e. In the dialog box, complete the following:
   i. Enter the **Contract Number**.
   ii. Select the **Award Date**.
   iii. Enter the full address of the **Issuing Location**.
   iv. Enter the **Contract Value**.
   v. Enter the **Contract contact email**.
   vi. Enter **Justification for Direct Award/Limited Tendering**.
   vii. Click **Save & Close**.

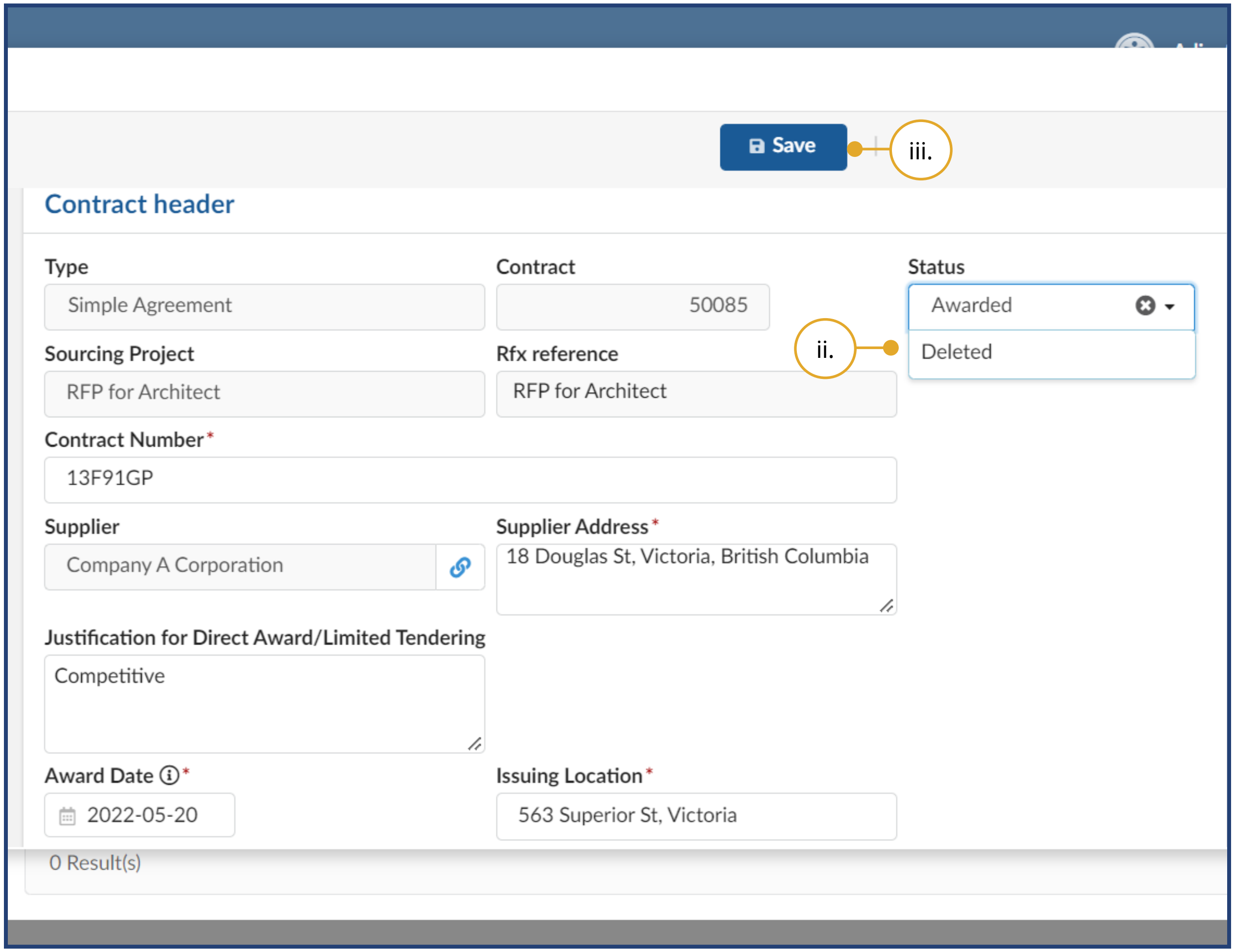
The **Type** field is a BC Bid application requirement and is not available to any user.

Editing or Deleting Contract Award Summary



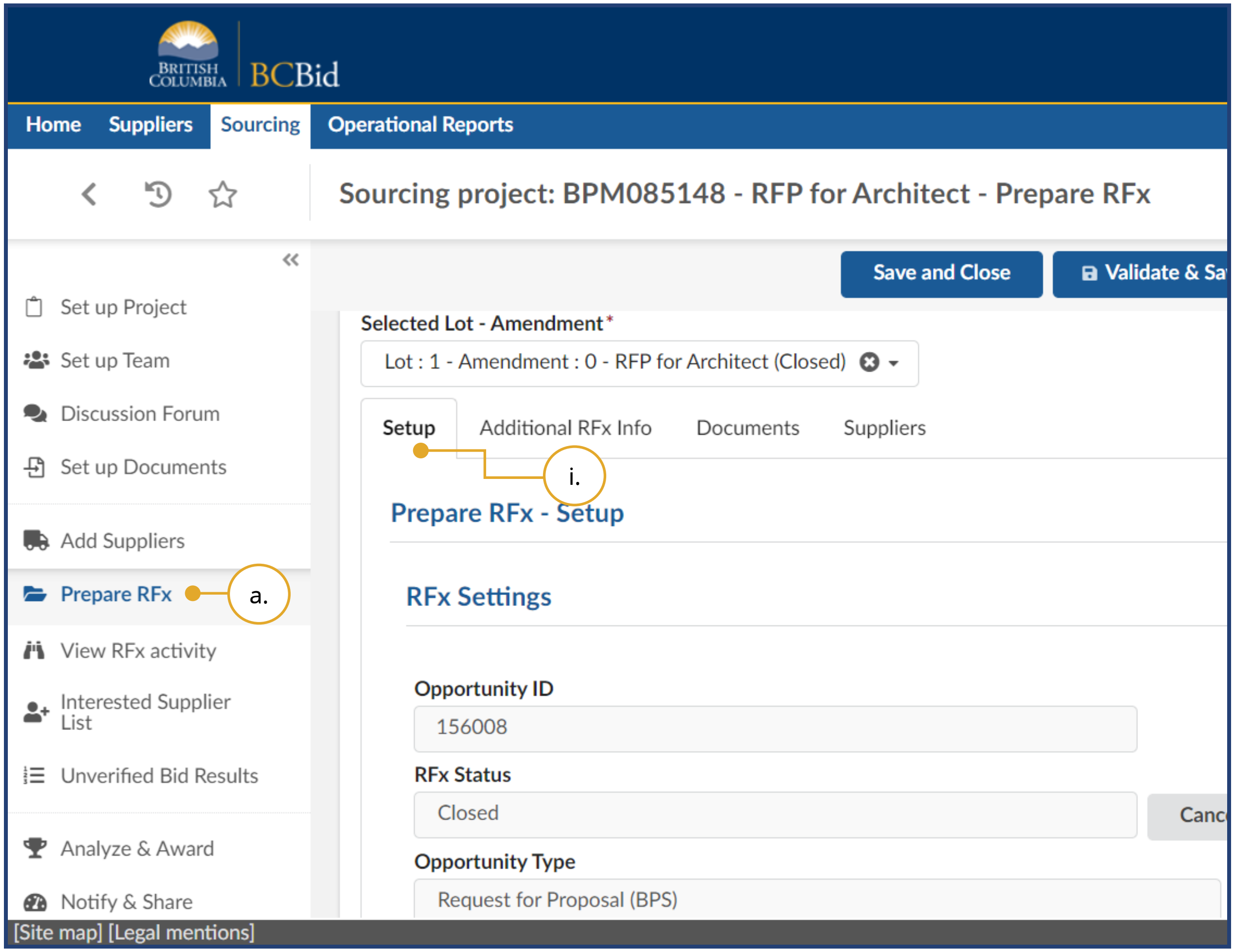
f. *Optional*: To edit or delete a Contract Award Summary, click the Contract Award Summary **hyperlink**.

A Contract Award Summary cannot be edited or deleted if the opportunity status is ‘Completed’.



i. Edit the Contract Award Summary as necessary, or
ii. To delete the Contract Award Summary, select **Deleted** in the Status drop-down.
iii. Click **Save**.

Step 8 – Completing an Opportunity



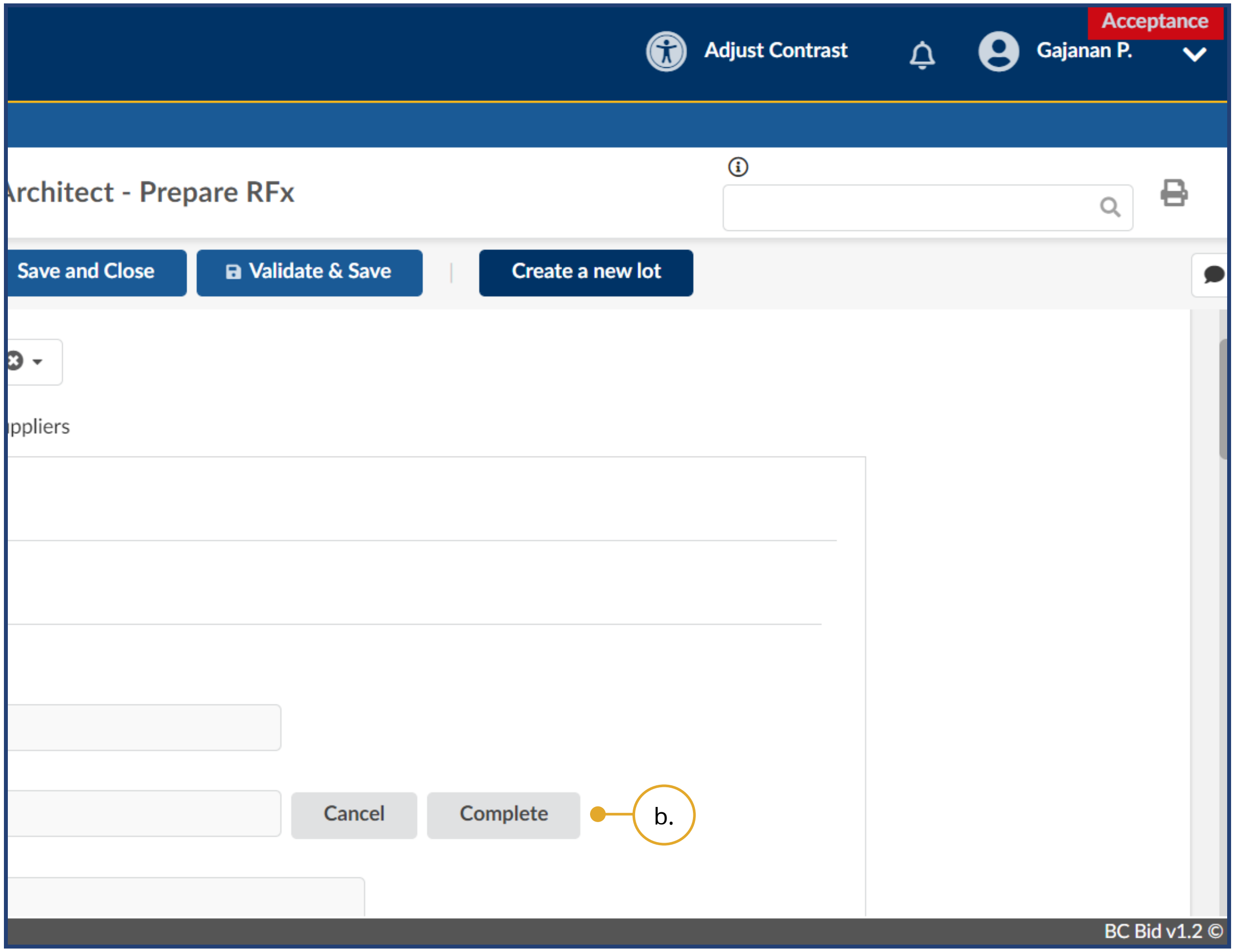
50. When appropriate, change the status of the opportunity to 'Completed':

a. In the left-hand menu, click **Prepare RFx**.

   i. Click the **Setup** tab.

[Completing an opportunity](#)

This step does not apply to opportunities with continuous intake until the Closing Date is reached.



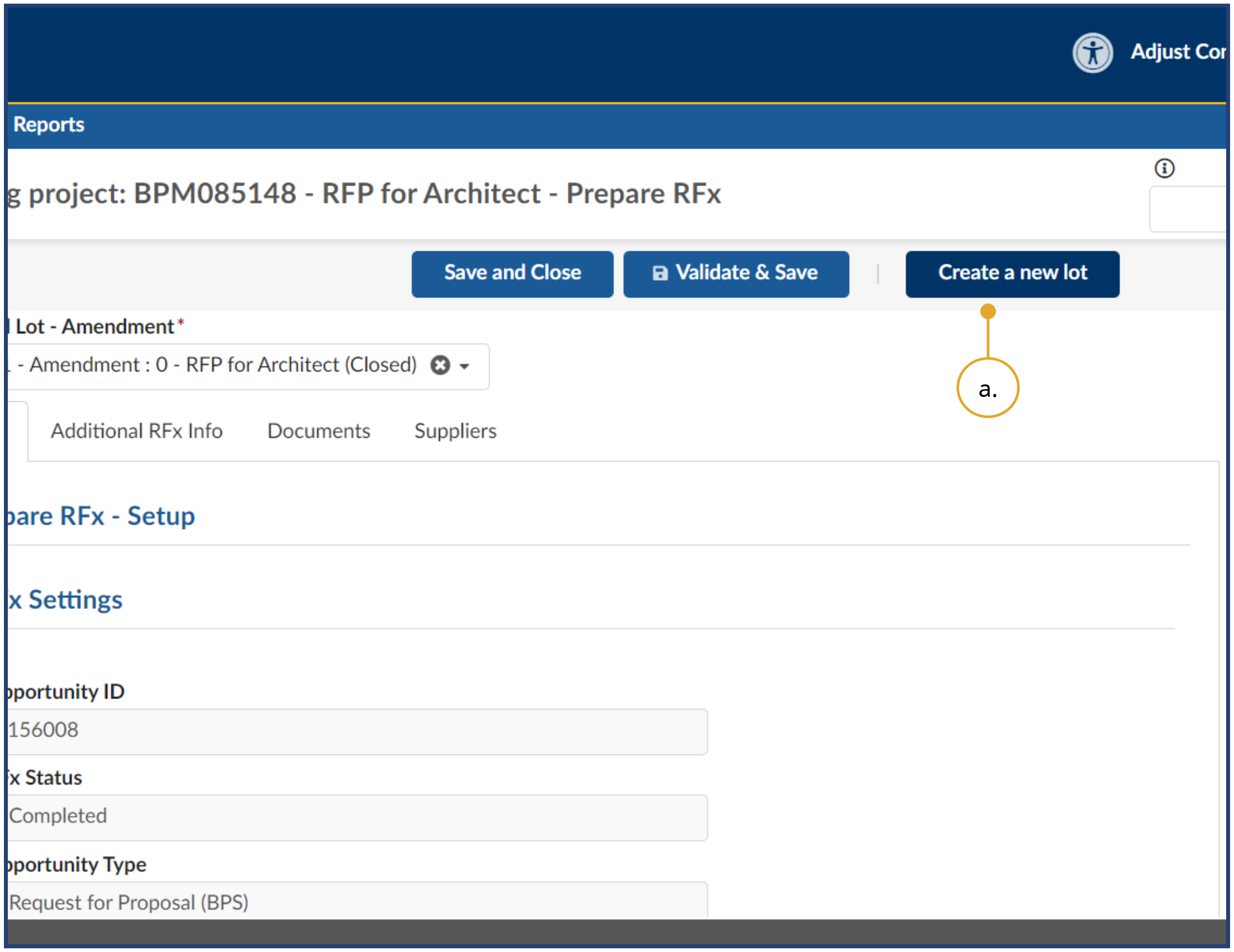
b. Click **Complete** to change the RFx Status to ‘Completed’.

Note: Click **Cancel** to cancel the opportunity at any point before the contract award notice is published. There can be different reasons for cancelling an opportunity.

Suppliers who participated in the opportunity will see the opportunity in ‘Processing’ status until the RFx status is changed to ‘Completed’ by clicking the **Complete** button.

Creating a New Lot

Lots are utilized in multi-stage procurements, they connect different stages of a procurement (eg: RFI, RFQ and RFP). The Discussion Forum, Set up Team, Set up Documents, and Enquiries as well as the Add Supplier tabs are copied across all RFx/Lots within a Sourcing Project.

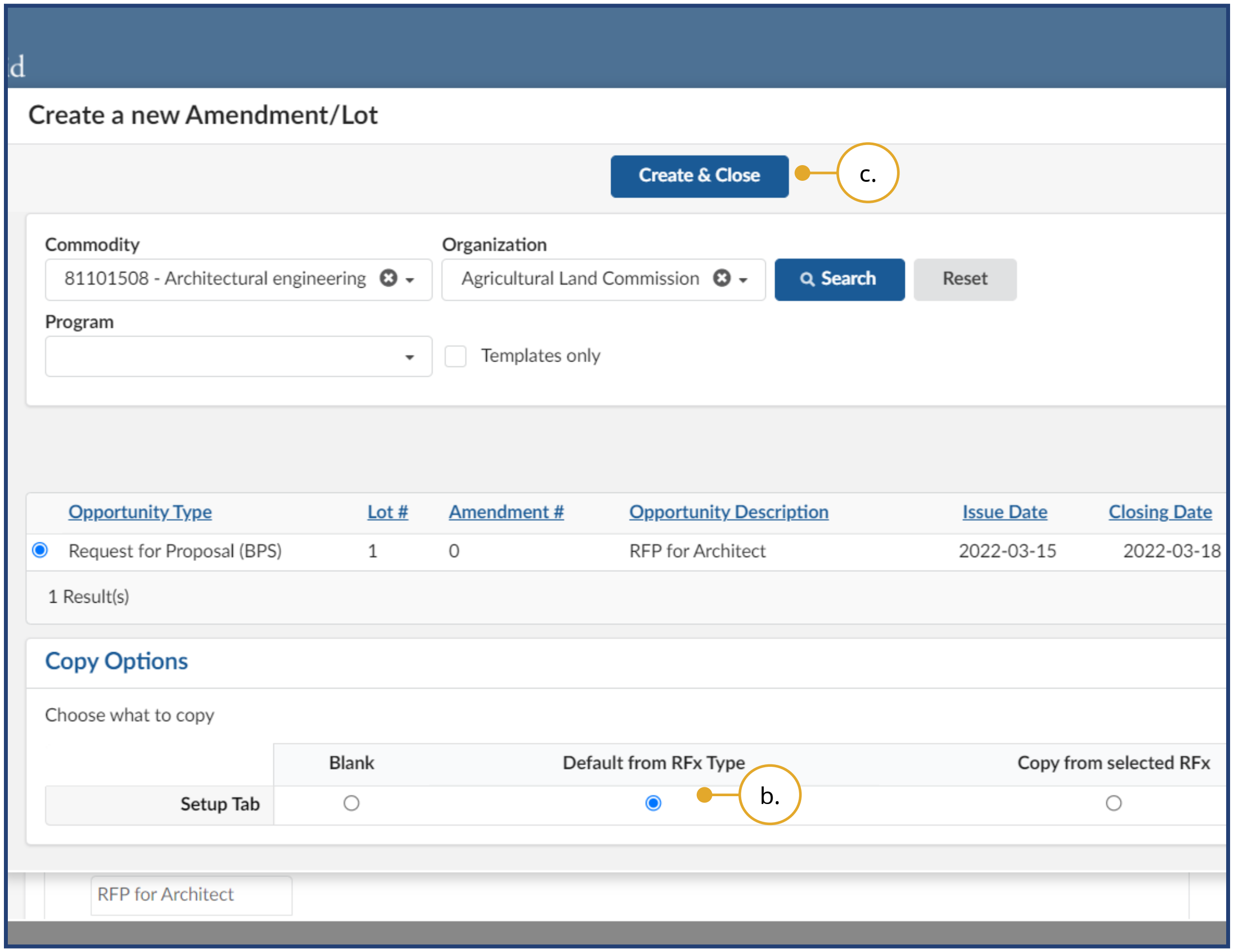


51. *Optional:* To create a new Lot, in the left-hand menu, click **Prepare RFx**.

a. Click **Create a new Lot**.

Note: The information entered in Discussion Forum, Set up Team, Set up Documents and the Add Supplier menus is copied across all opportunities within a Sourcing Project.

How to create a new Lot

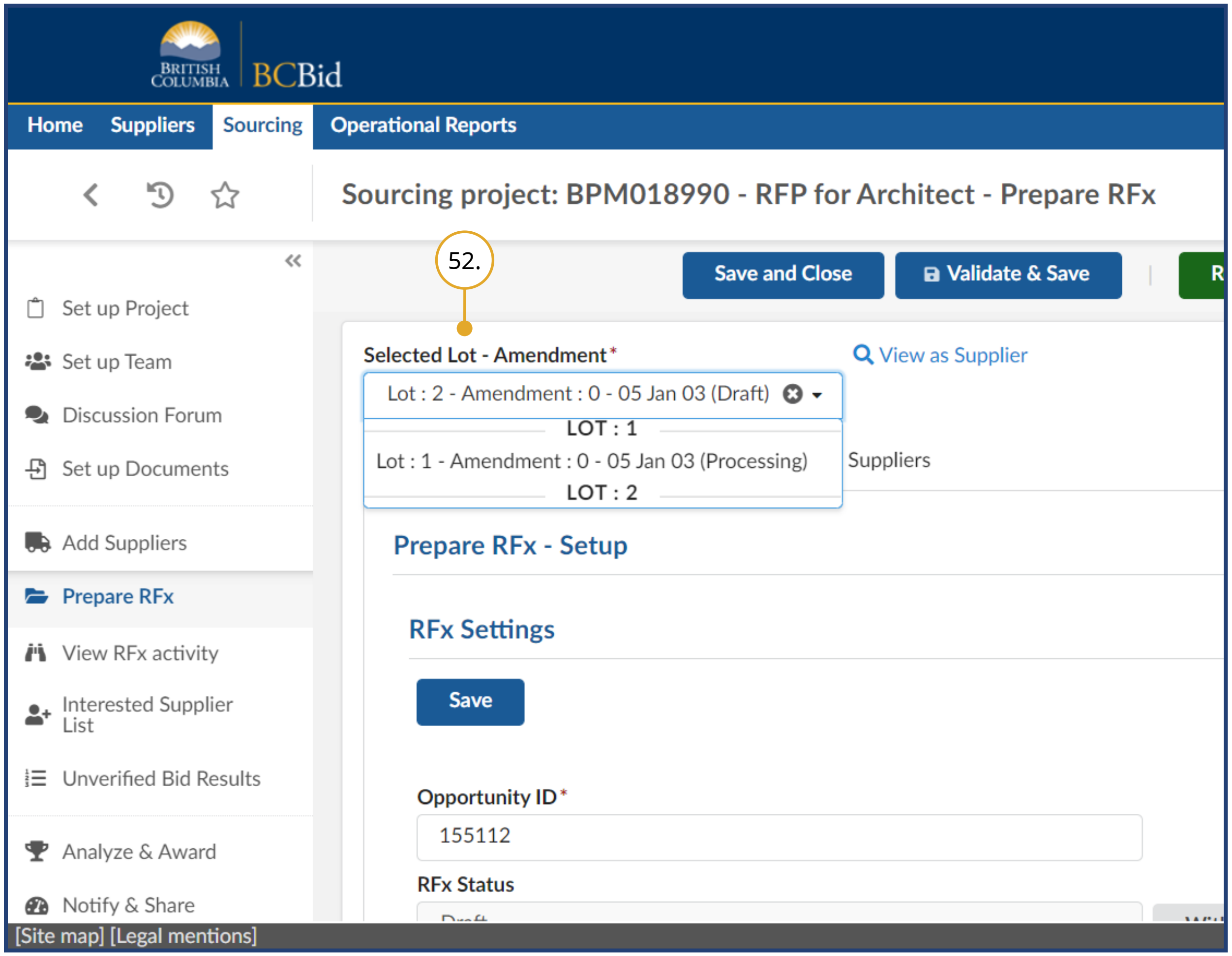


b. In the dialog box, within the Copy Options table, ensure the **Default from RFx Type** option is selected.
c. Click **Create & Close** and then click **Continue.**

Note: When you are editing or reviewing an opportunity, ensure that you are in the correct Lot.

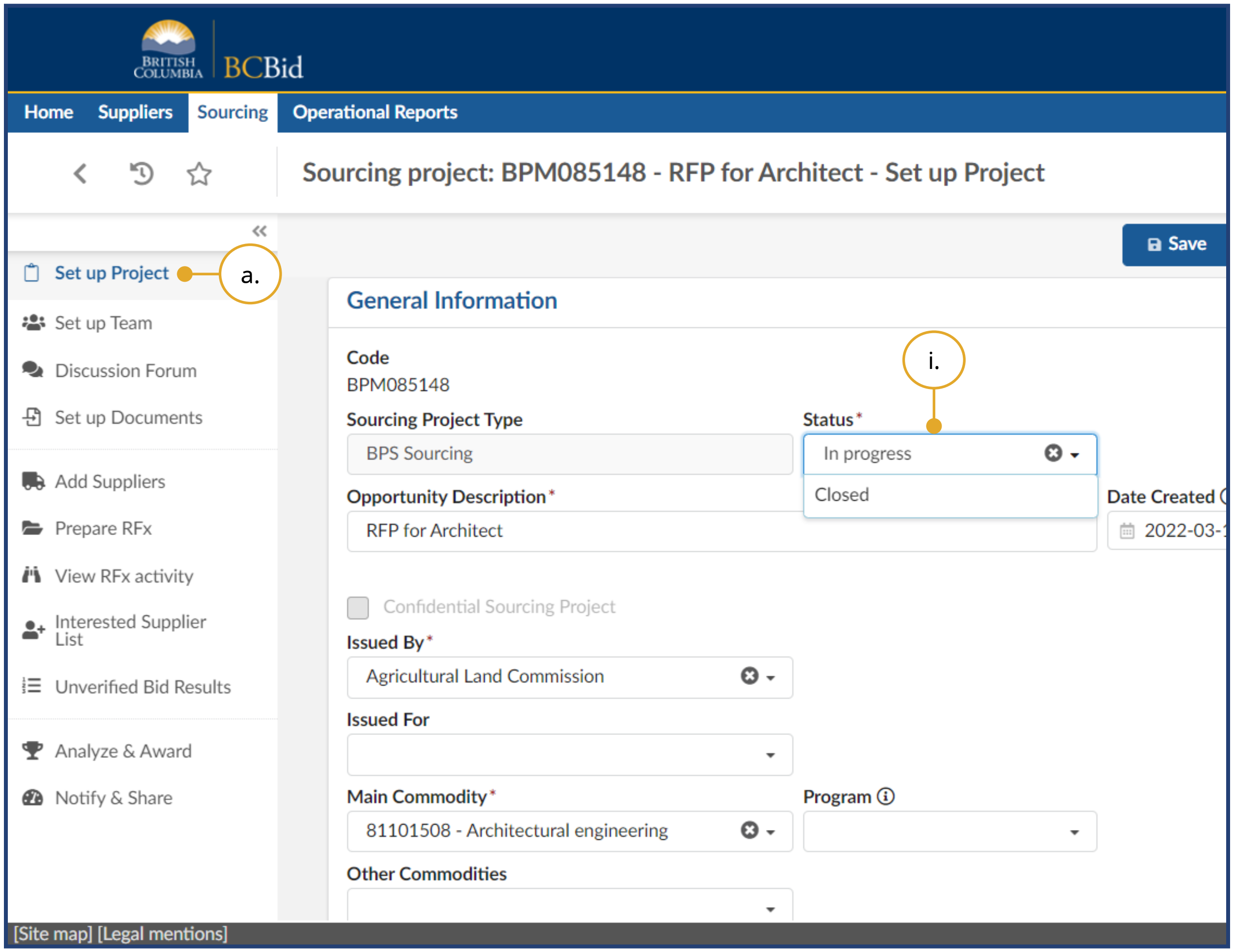
After creating a new Lot, Buyers must complete the necessary menus and tabs then issue the opportunity

Toggle Amendment or Lot



52. *Optional*: To toggle between Amendments or Lots, in Prepare RFx menu, choose the Amendment or Lot using the **Selected Lot – Amendment** dropdown.

Closeout a Sourcing Project



53. *Optional:* Change the status of the Sourcing Project to ‘Closed’:

a. In the left-hand menu, click **Set up Project**.

   i. In the **Status** drop-down list, click **Closed**.

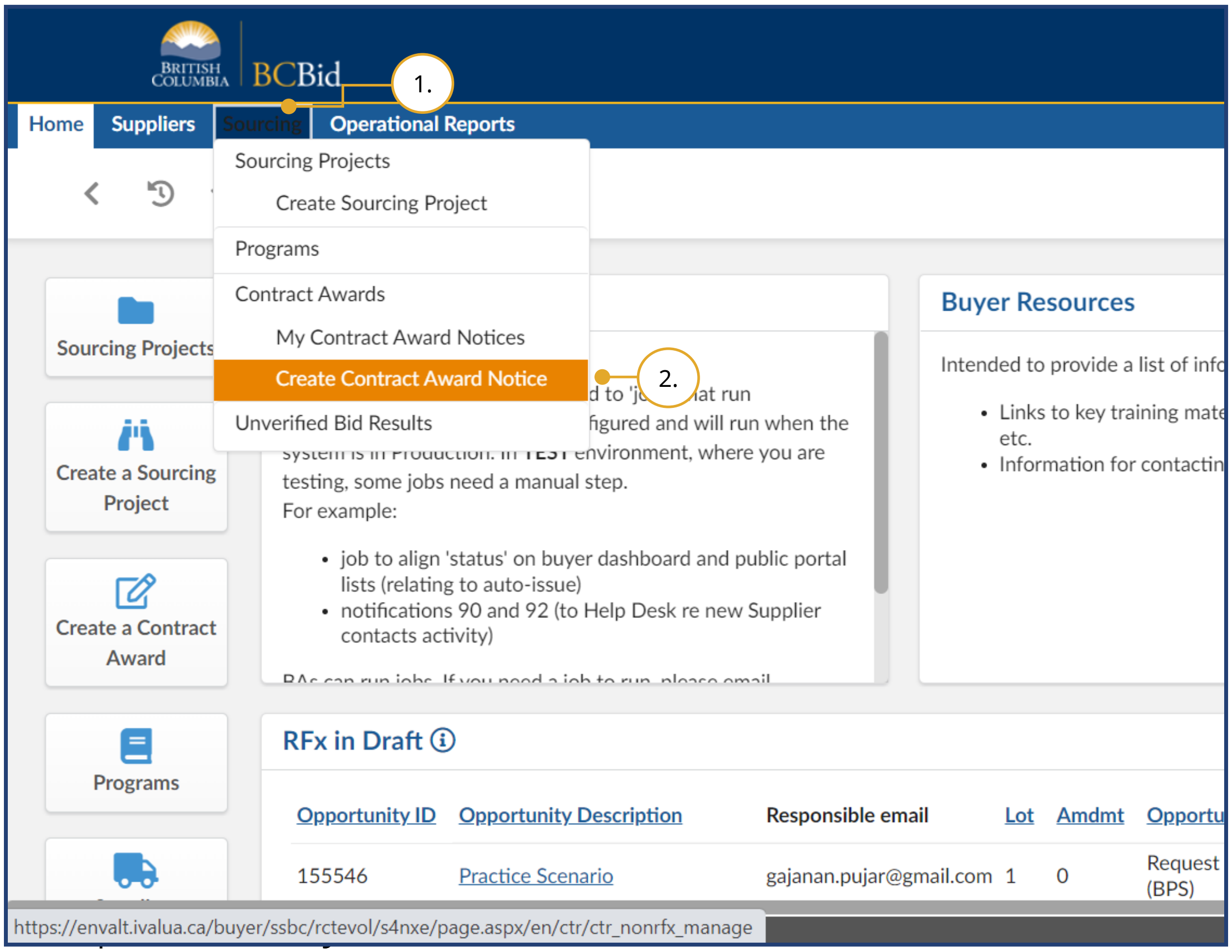
Note: This optional step is applicable to Sourcing Projects.

[Closeout a Sourcing Project]

Special Considerations

Contract Award Notice

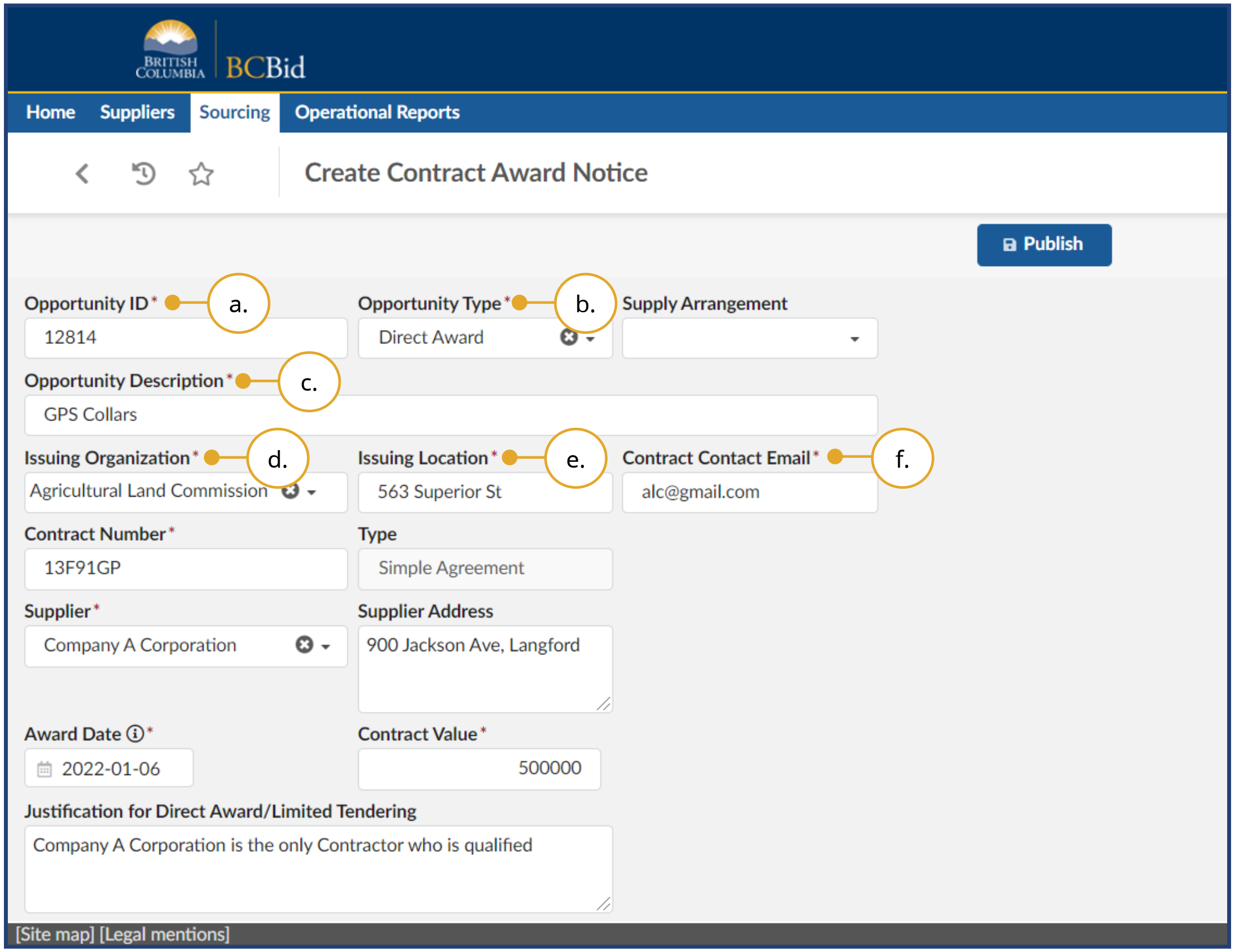
Buyers must use the Contract Award Notice for all direct awards that are over threshold. The Contract Award Notice is used for any purchases from a standing arrangement, standing offer or other form of direct selection. Additionally, the Contract Award Notice is used for opportunities that result in multiple contract awards.



1. On the main menu, click **Sourcing**.
2. Click **Create Contract Award Notice**.

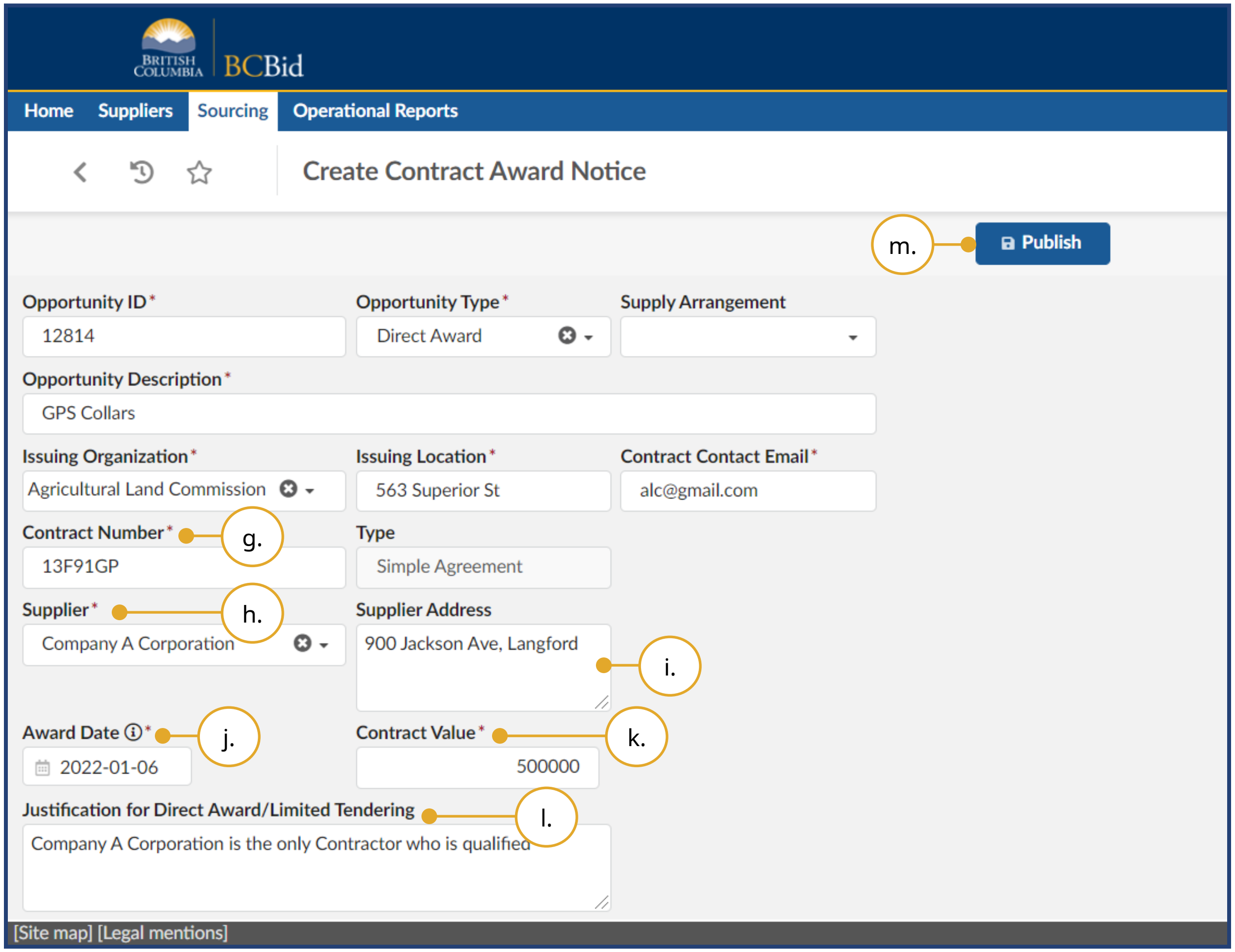
Note: The **My Contract Award Notices** menu is intended to allow Buyers to review and edit the contract award notices that they have created through the **Create Contract Award Notice** form. It does not show (or allow Buyers to edit) Contract award notices that were created through the Notify & Share menu in an opportunity.

[Creating a Contract Award Notice]



3. In the dialog box:
   a. Enter the **Opportunity ID**.
   b. Select the **Opportunity Type**.
   c. Enter the **Opportunity Description**.
   d. Select the **Issuing Organization**.
   e. Enter the **Issuing Location**.
   f. Enter the **Contract Contact Email**.

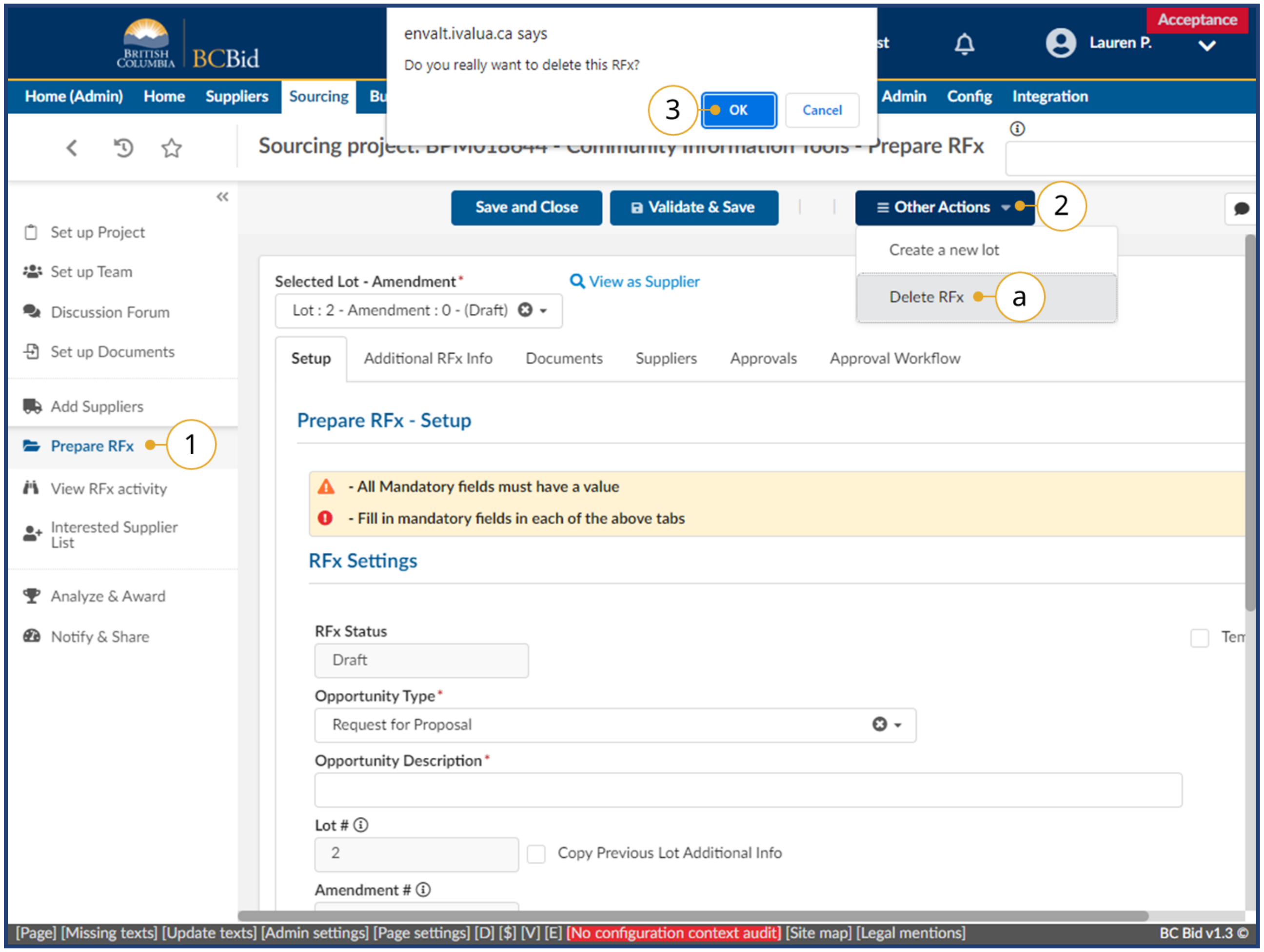
   Note: The **Supply Arrangement** drop-down list is not applicable to Direct Awards but is required for multiple contract awards resulting from a single opportunity.



g. Enter the **Contract Number**.
h. Select the **Supplier**.
i. Enter the **Supplier Address**.
j. Select the **Award Date**.
k. Enter the **Contract Value**.
l. Enter the **Justification for Direct Award/Limited Tendering**.
m. Click **Publish**.

[How to explore Contract Awards]

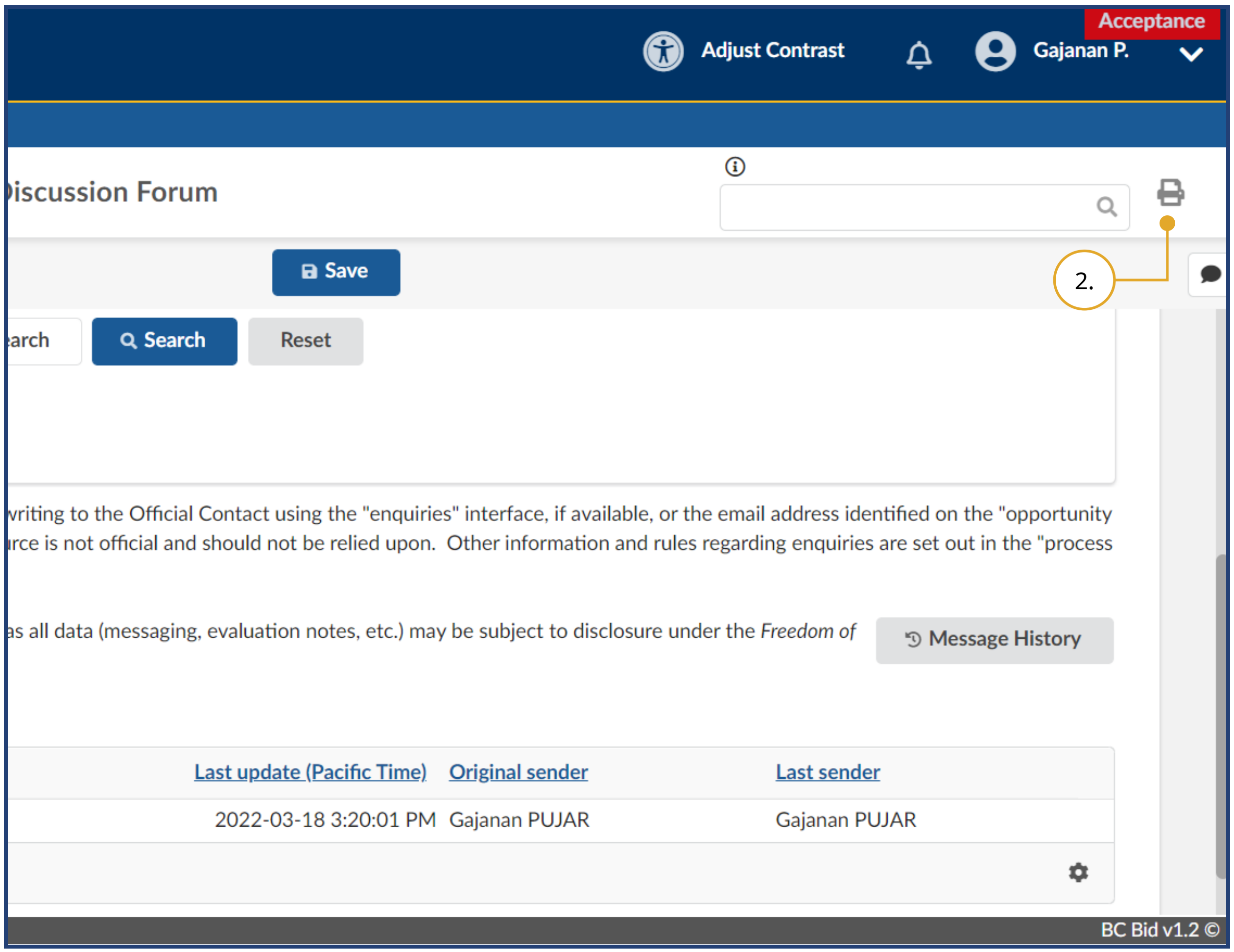
Delete a Draft Opportunity (RFx)



1. Click on **Prepare RFx**.
2. Click Other Actions.
   a. Click **Delete RFx**.
3. In the dialog box, click **OK** to confirm deleting the RFx.

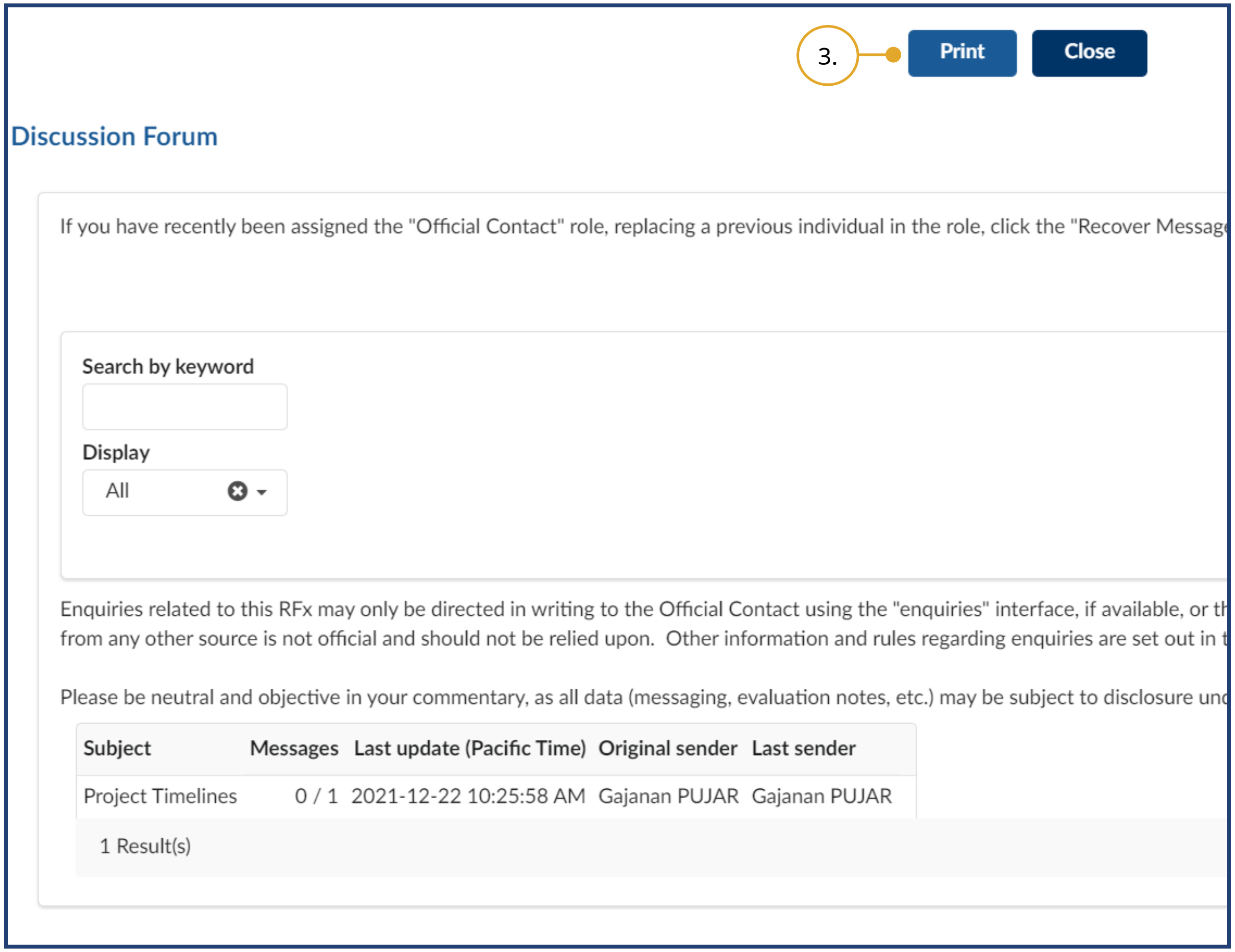
Printing Records

Print enables users to print a tab or the menu of an opportunity, or to save an opportunity as a PDF for records management. A Buyer, for example, may use the print function to save a copy of the internal and external communication for their records or FOI requests.



1. Navigate to the screen you would like to print.
2. Click the **Print** icon (top-right corner of the screen) to open the print version in a new tab in your browser.

Note: When archiving message data for an opportunity using **Message History** button, you will need the print out of each message plus the Excel file to establish who was sent each message. The message spreadsheet can be downloaded via the **cog** icon.



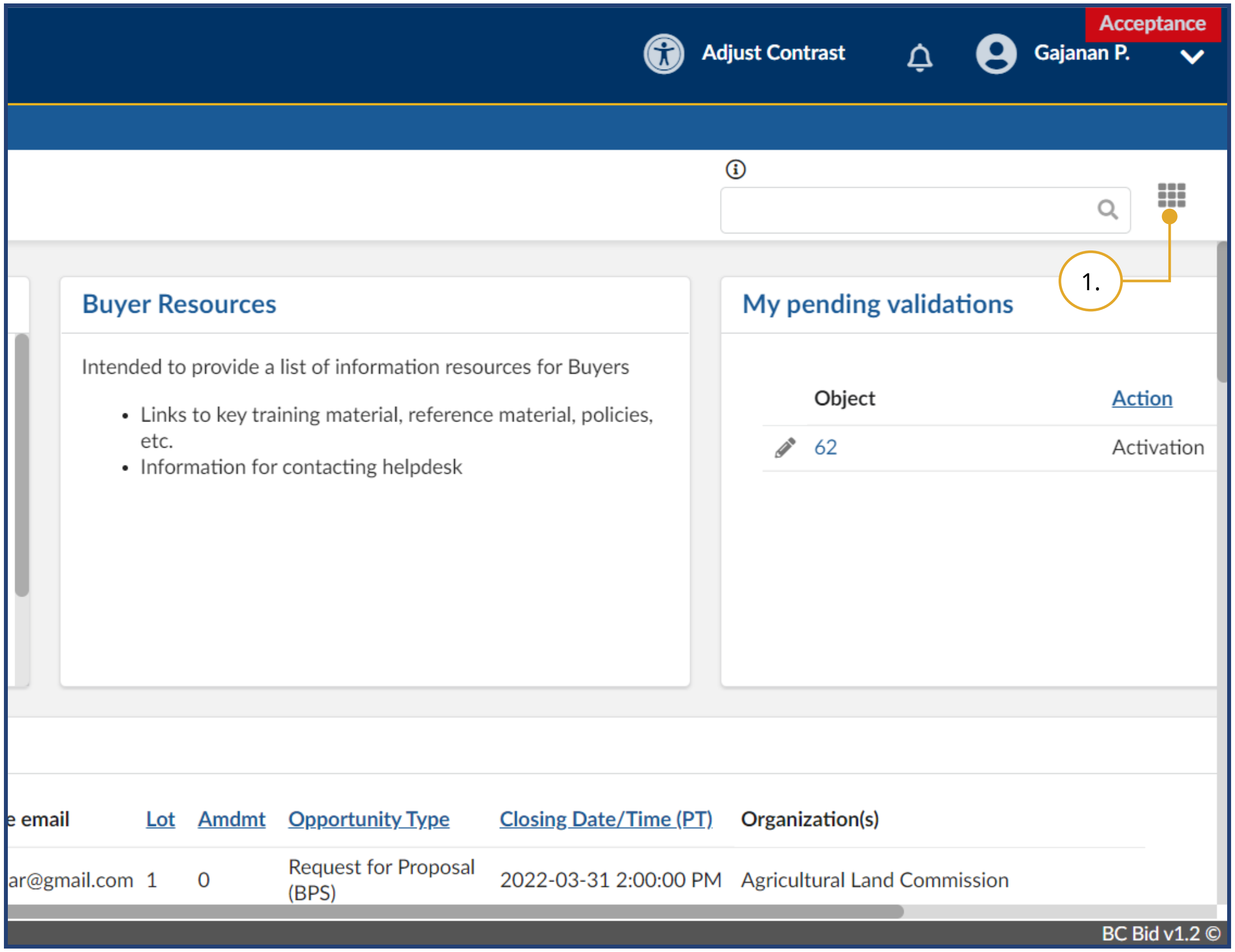
3. Click **Print**.

   Note: Users should ensure that no changes are made on this screen.

4. In the dialog box, select the appropriate print settings and click **Print**.

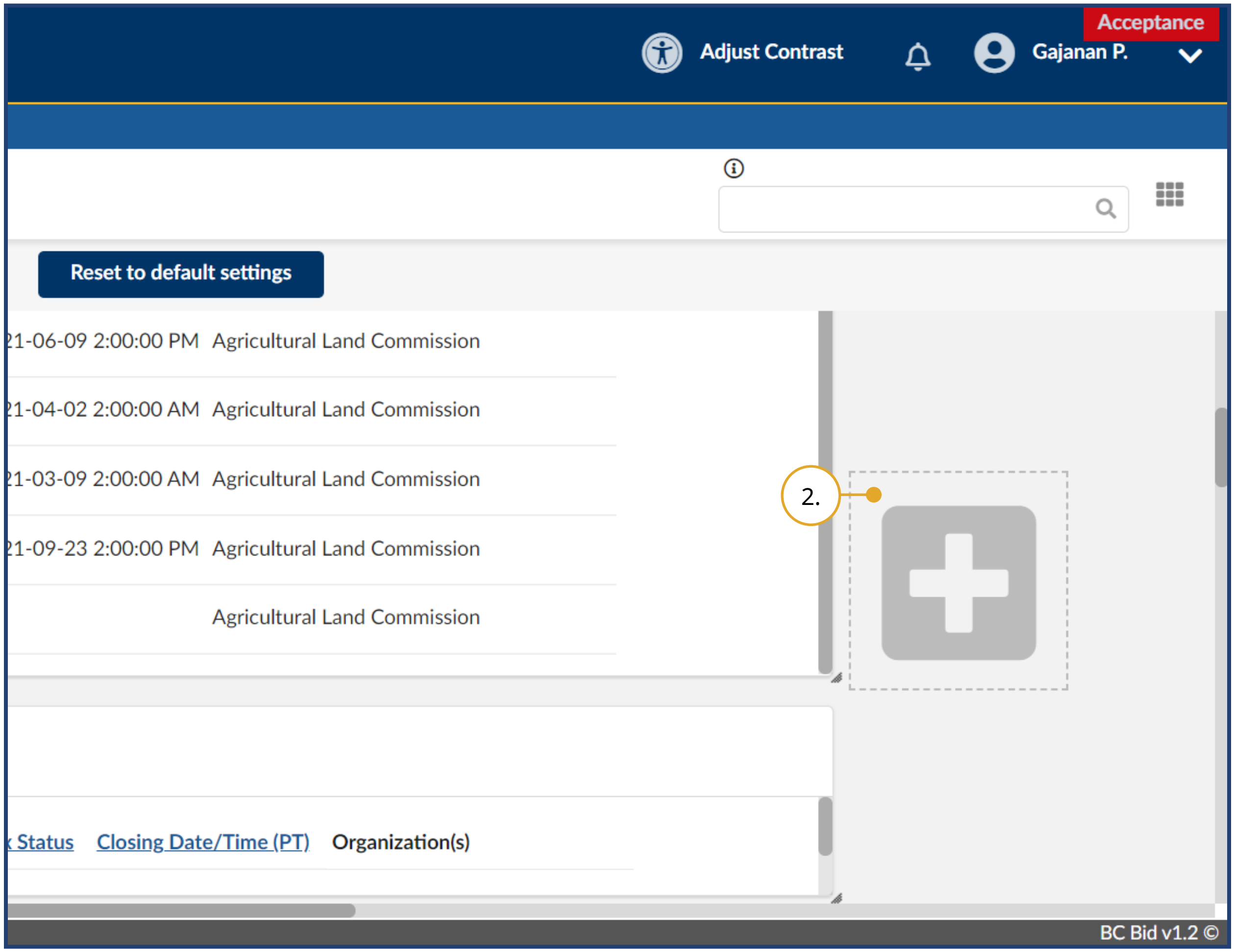
Customize Dashboard

You can customize your Buyer Dashboard to suit your needs. You can also add shortcuts to various widgets to the dashboard.

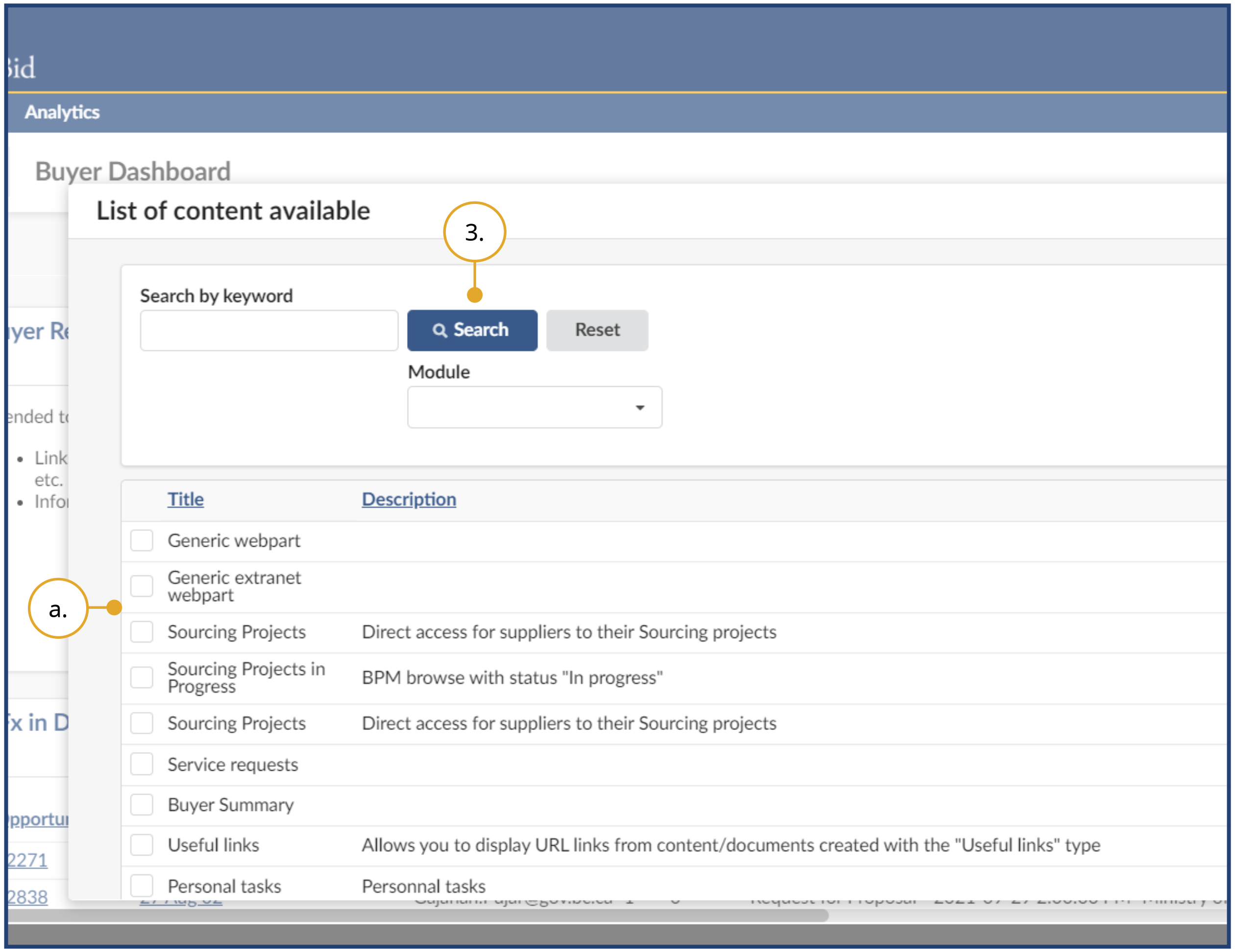


1. On the Buyer Dashboard, click the **Customize dashboard** icon (grid of 9 squares) at the top-right of the page.

Add Widgets

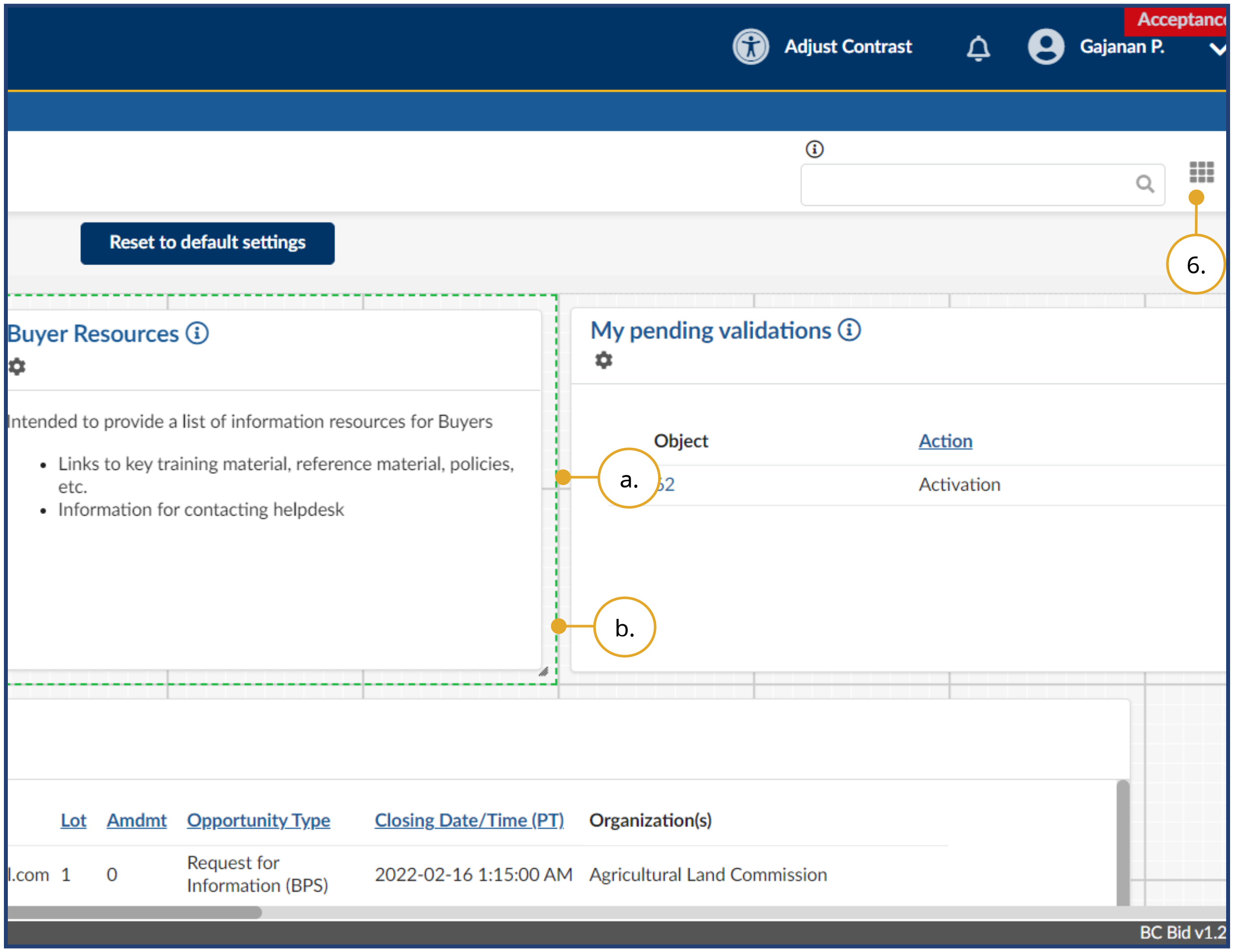


2. Point to any blank area of the dashboard and an enlarged **+** sign will display. Click the dashboard.



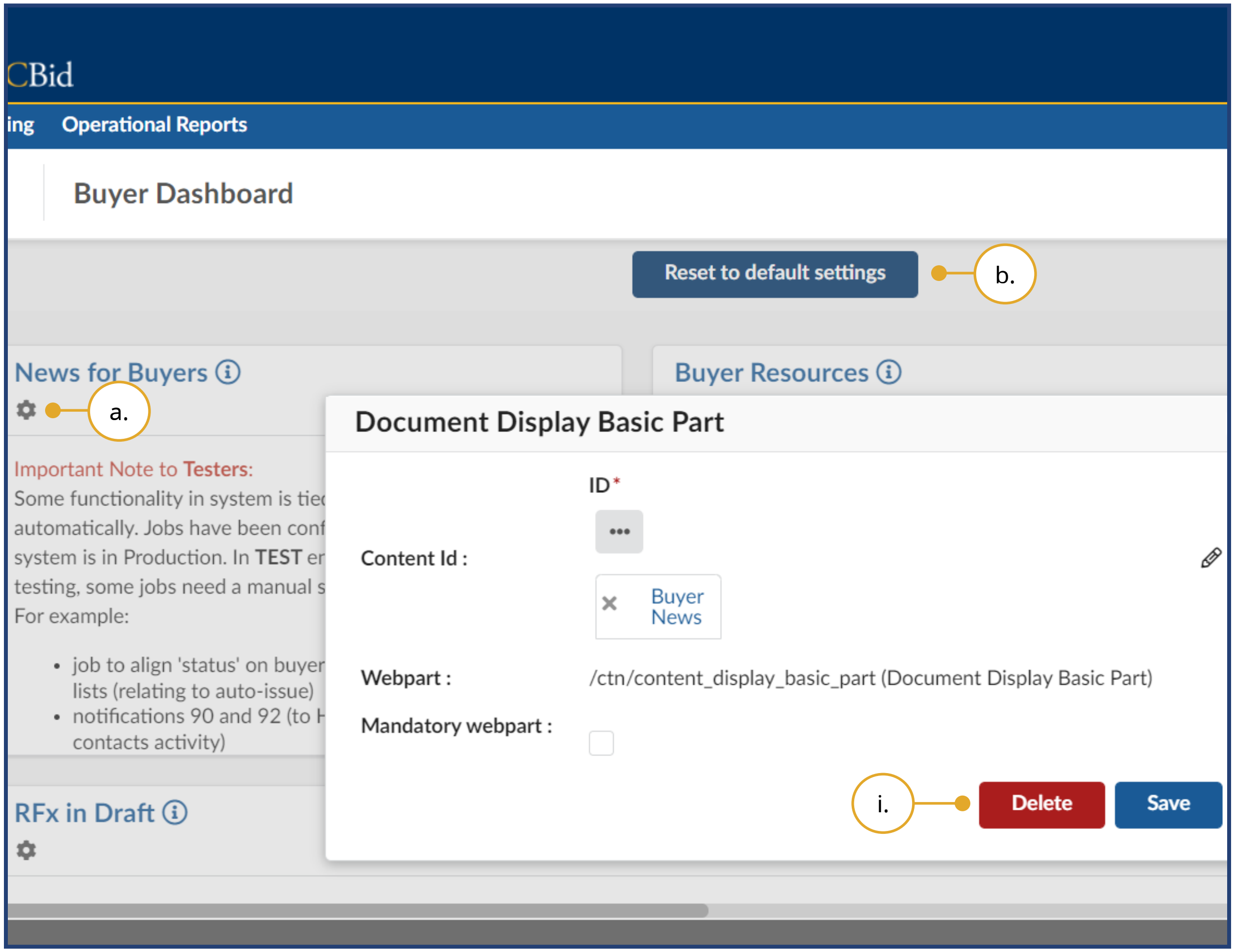
3. In the dialog box, enter text in the **Search by keyword** text box or select an option from the **Module** drop-down list and then click **Search**.
   a. Select the appropriate checkbox to add the widget to the dashboard.
4. Repeat as necessary.
5. Click the **Customize dashboard** icon again to stop adding widgets and save the changes.

Move Widgets



6. Click the **Customize dashboard** icon.
   a. Select the appropriate widget. When it is surrounded by a green box, drag it to a new place on the dashboard.
   b. Select the corner or sides of a widget to reduce, expand or reshape the widget.

Delete Widgets

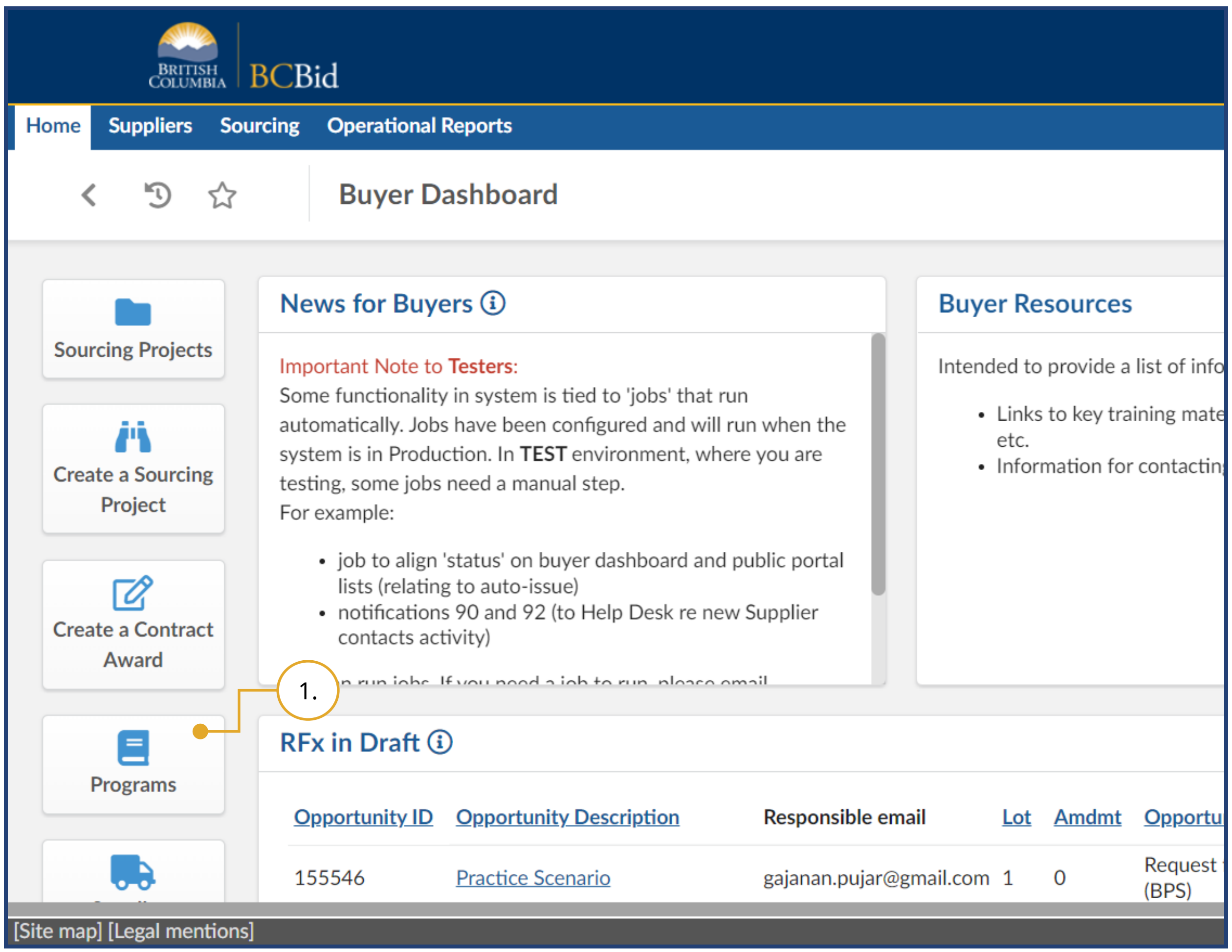


7. Click the **Customize dashboard** icon.
   a. Click the **cog** icon on the appropriate widget
      i. Click **Delete**.
   b. Click **Reset to default settings** to use only the default widgets.

Programs

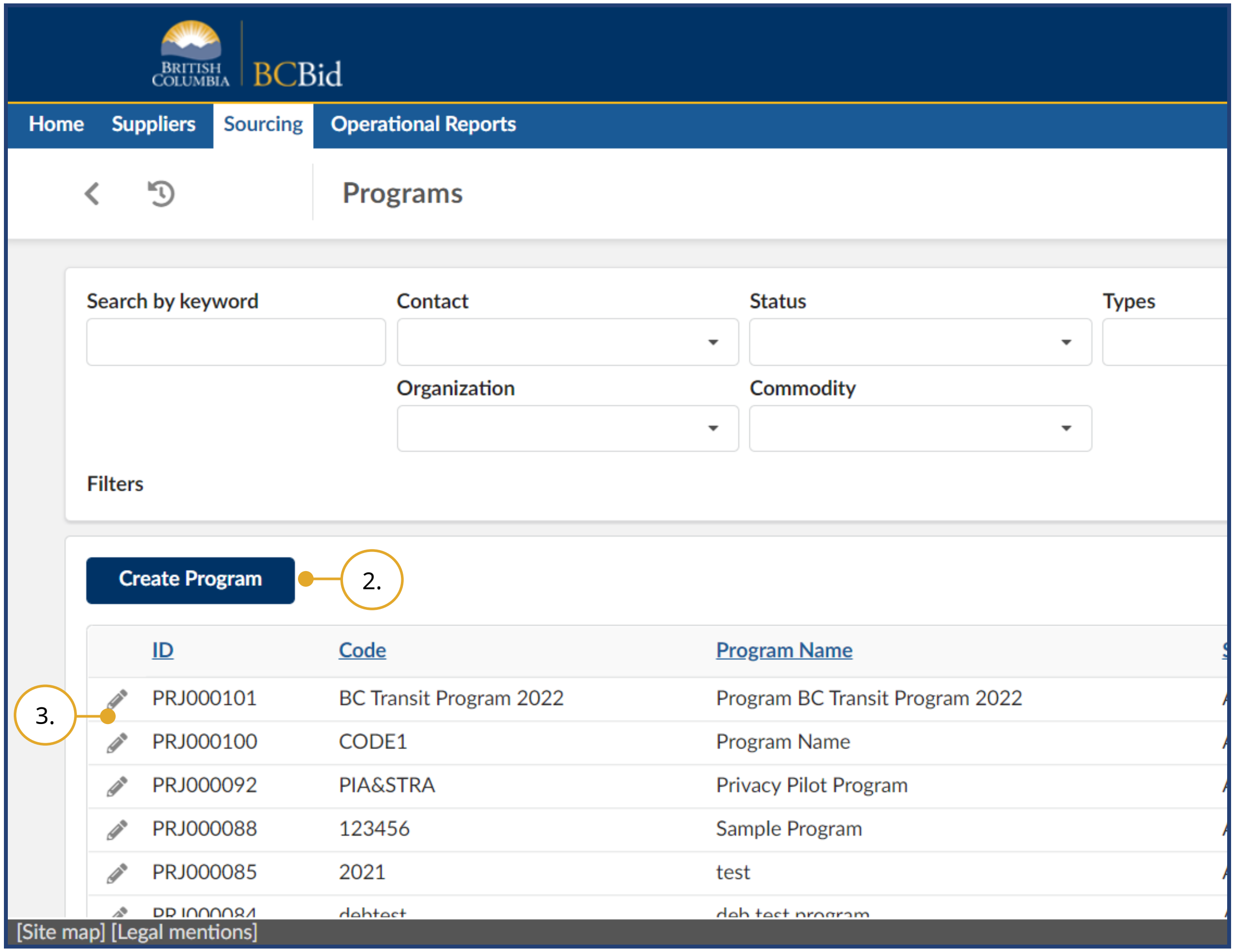
Programs are document storage repositories for commonly used generic documents or for grouping a suite of Sourcing Projects under a single umbrella. You can set up and link programs to your opportunities by selecting the appropriate program from the Programs drop-down list. Documents available under a program will be accessible to the sourcing team members to upload for external view. You can track opportunities linked to a program and view the status of those opportunities. Within a program, you can create a team to manage the documents for a wider group and use the discussion forum to communicate with program team members.

Create a Program

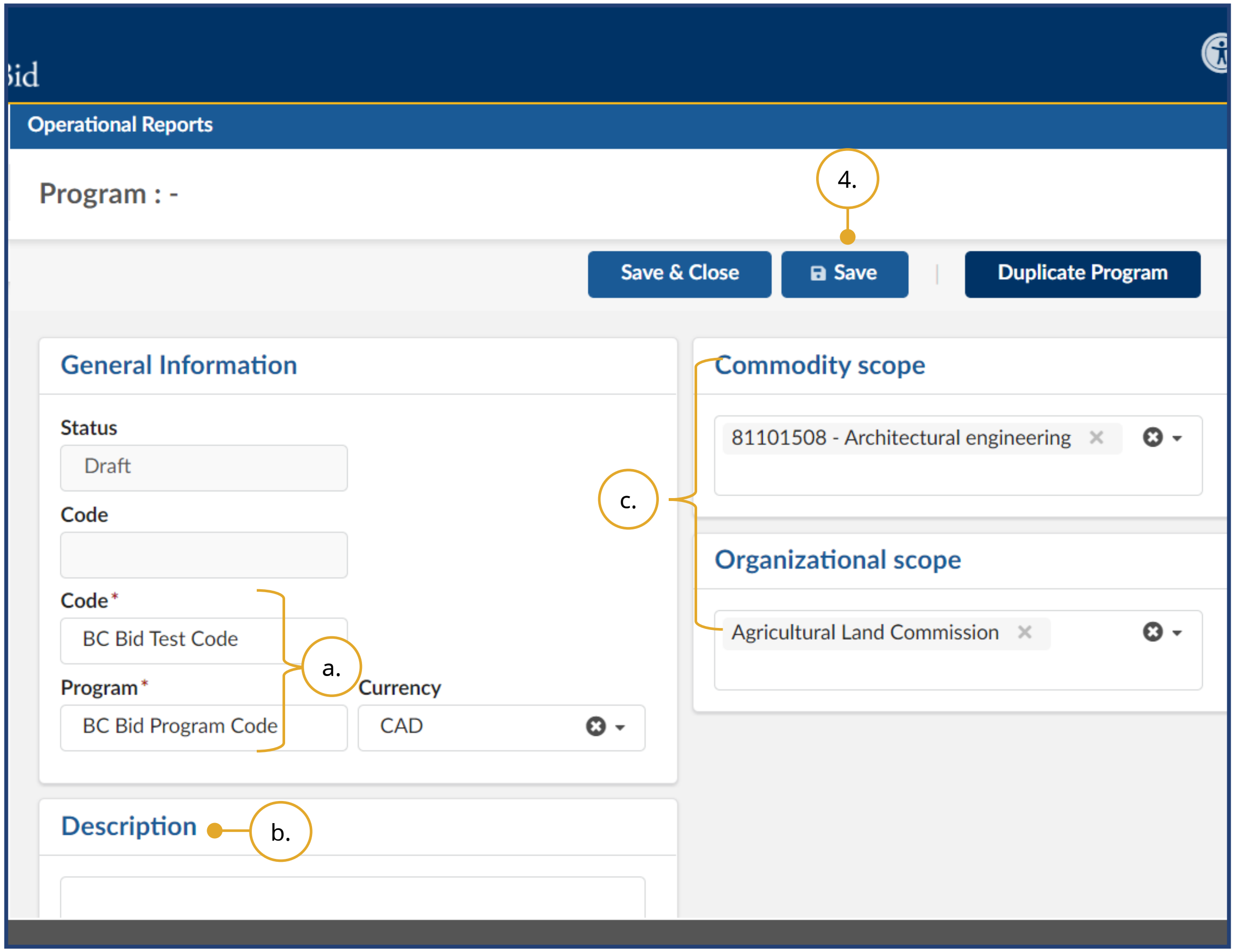


1. In the quick access menu, click **Programs**.

[How to Create a Program]



2. Click **Create Program**.
3. *Optional:* You can edit Programs by clicking the **pencil** icon beside the appropriate Program ID.



4. Complete the General Information form and click **Save**.

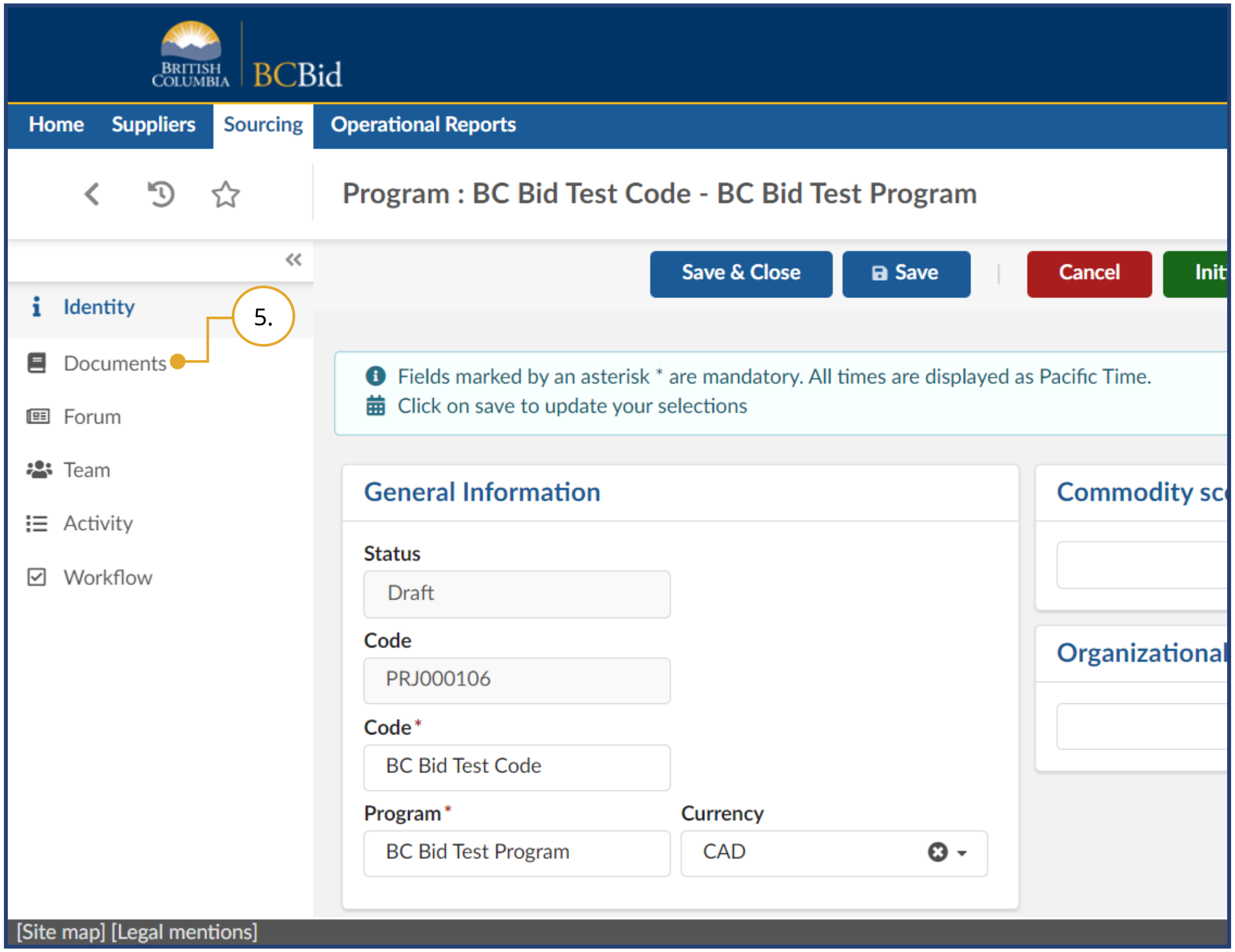
a. Enter a **Code** and **Program**.

b. *Optional*: Enter a description of the program.

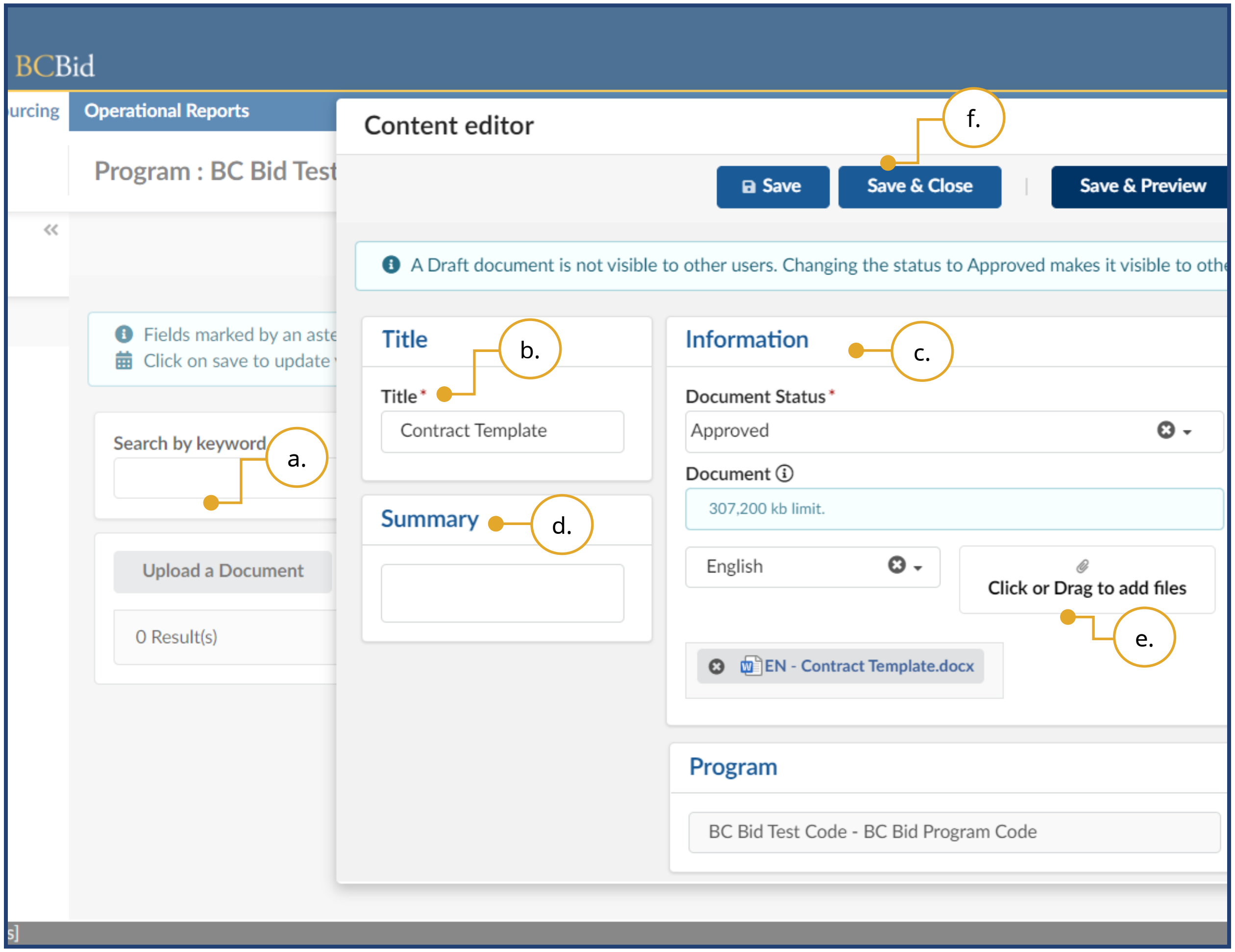
c. Select an **Organizational scope** and **Commodity scope** from the drop-down lists to differentiate between programs and make them easy to find.

Note: BPS entities can run opportunities and request bids in USD because the evaluation and pricing information are not captured in the BC Bid application. They will have to convert to CAD when they post the Contract award notice.
To duplicate an existing program, click **Duplicate Program**.

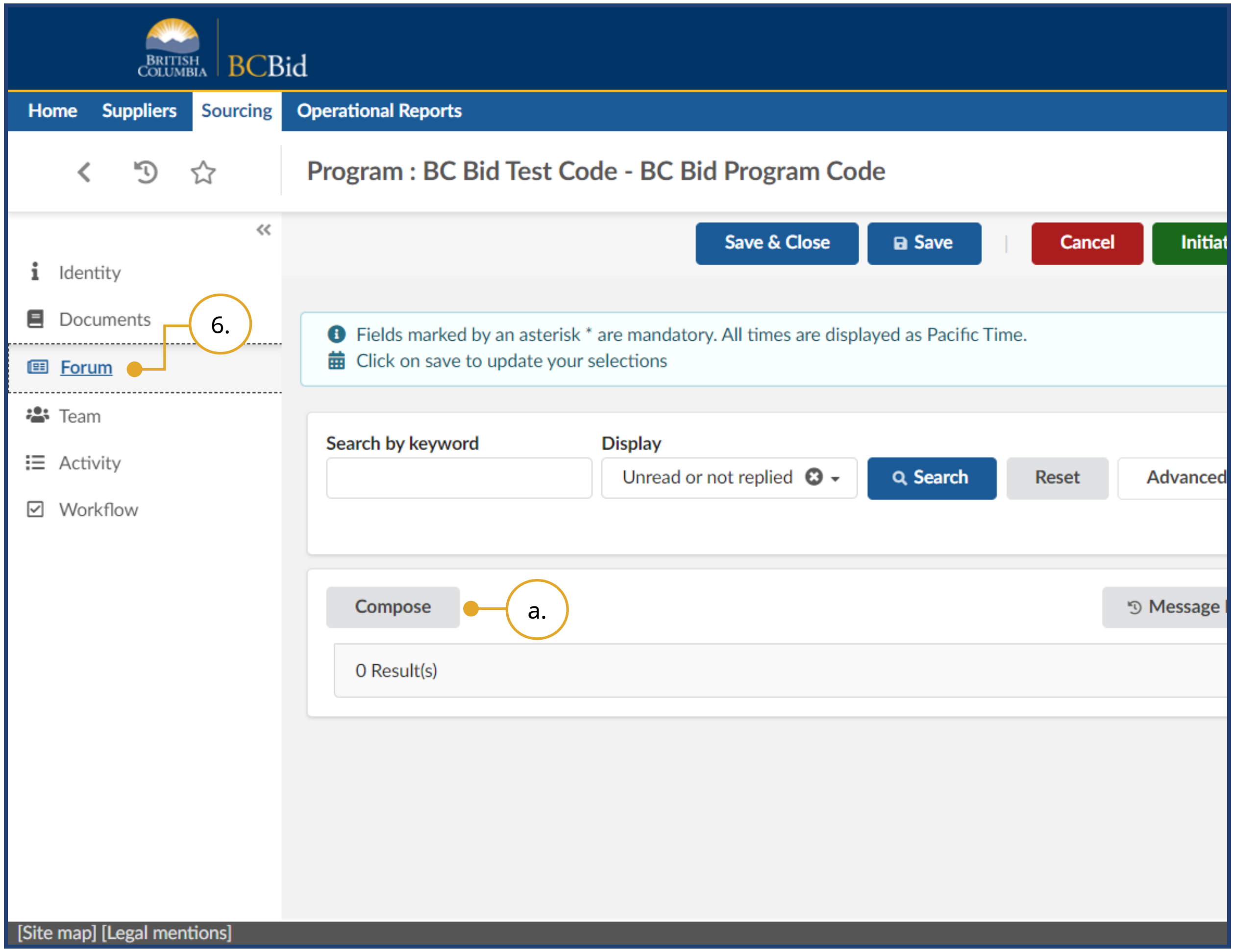
Code is a unique identifier for the Program. Users should enter a label name specific to their organization in the Program's **Code** text box. To limit a Program to an organization, select that organization in the **Organizational scope** drop-down list. The only **Currency** available is CAD.



5. To attach the relevant documents, click the **Documents** menu.

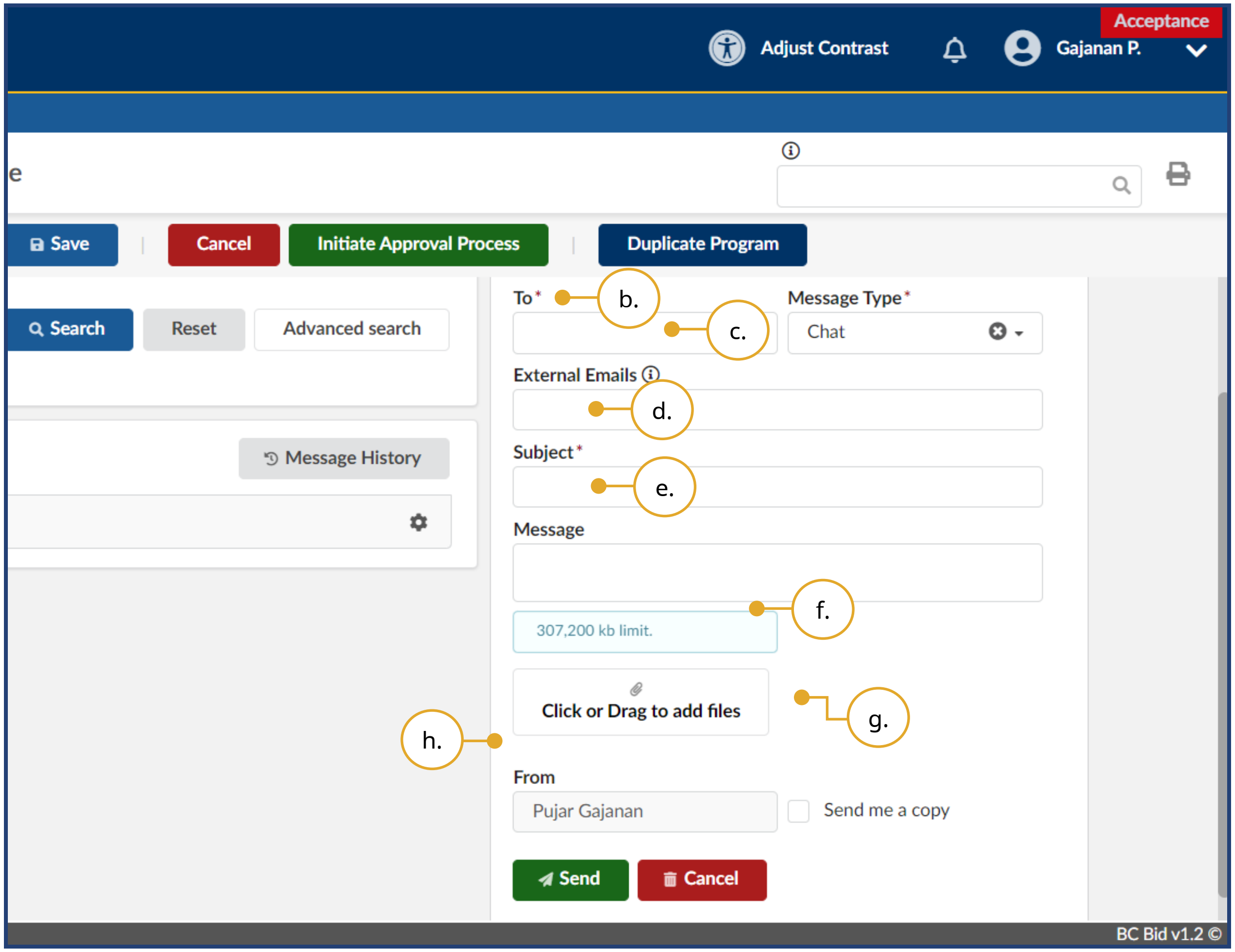


a. Click **Upload a Document**.
b. Enter a **Title**.
c. Change **Document Status** to Approved if you are ready to make it accessible to the program.
d. *Optional*: Enter a **Summary**.
e. To upload files, click **Click or Drag to add files** or drag and drop files on top of the button**.**
f. Click **Save & Close**.



6. *Optional*: Use the **Forum** menu to communicate with members added to the program.

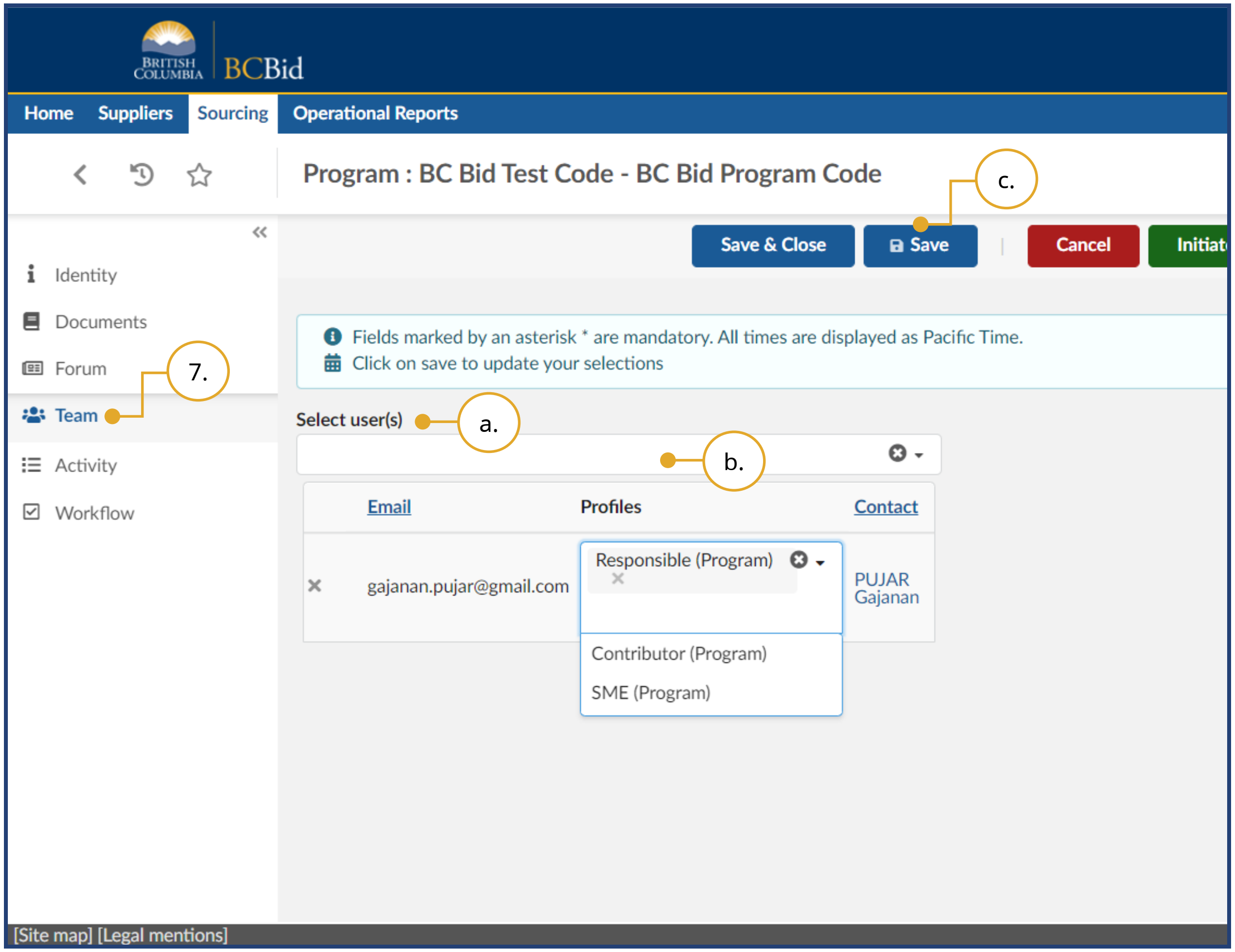
a. Click **Compose**.



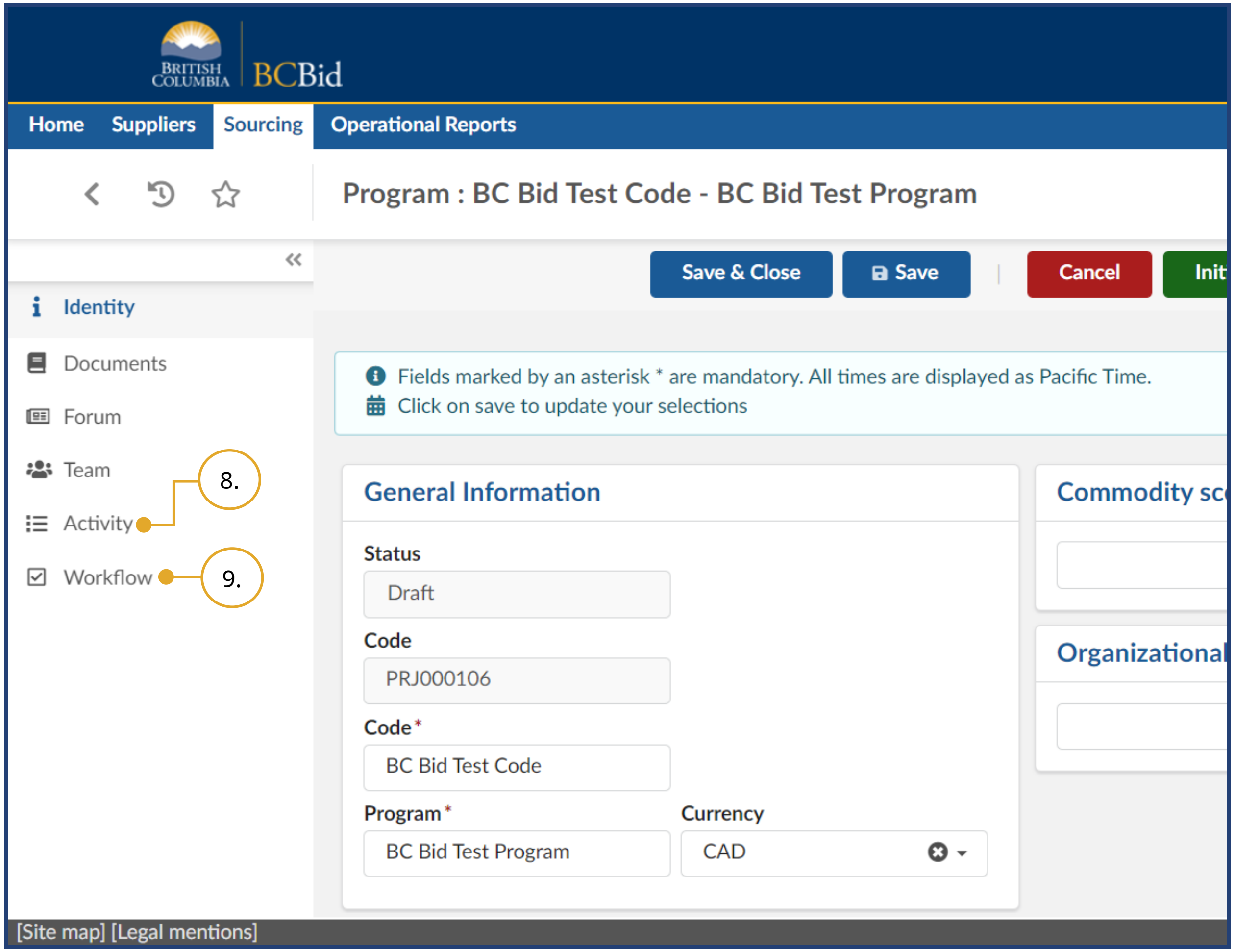
b. Use the **To** drop-down list to select one or multiple recipients.
c. *Optional:* In the **External Emails** text box, insert the email address of one or multiple external recipients.
d. Enter a **Subject**.
e. *Optional*: Enter a **Message**.
f. Add attachments to your message by clicking **Click or Drag to add files** or directly dragging and dropping a file onto the button.
g. To receive a copy of the message, click **Send me a copy**.
h. To send the message, click **Send**.

Note: You cannot delete sent messages.

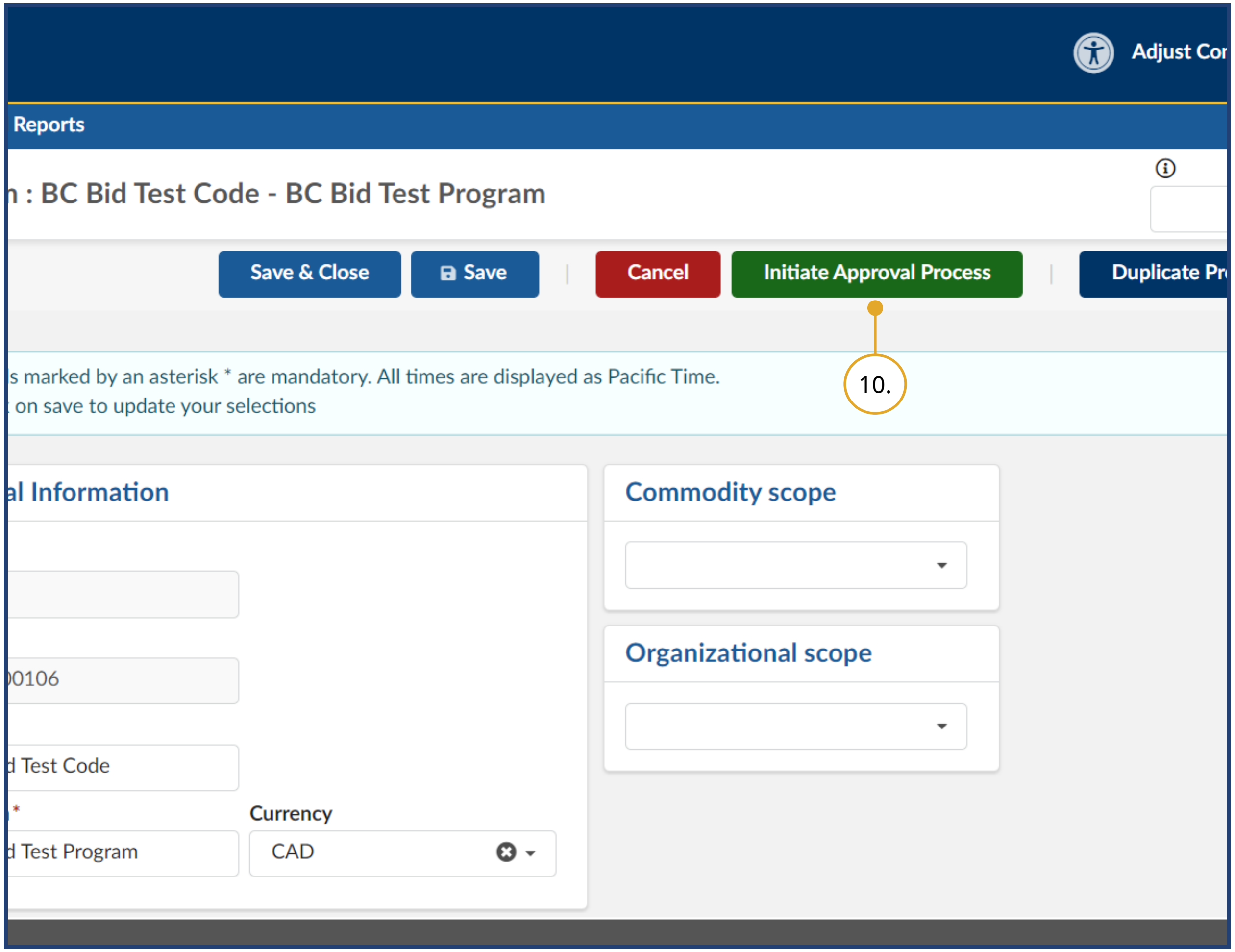
Files that are attached to BC Bid messages are only available within the BC Bid application and will not appear in the external email notification.



7. *Optional*: Use the **Team** menu to add members to the program.
   a. In the **Select user(s)** drop-down list, enter a user name.
   b. Using the **Profiles** column drop-down list, select a profile for the user.
   c. Click **Save**.



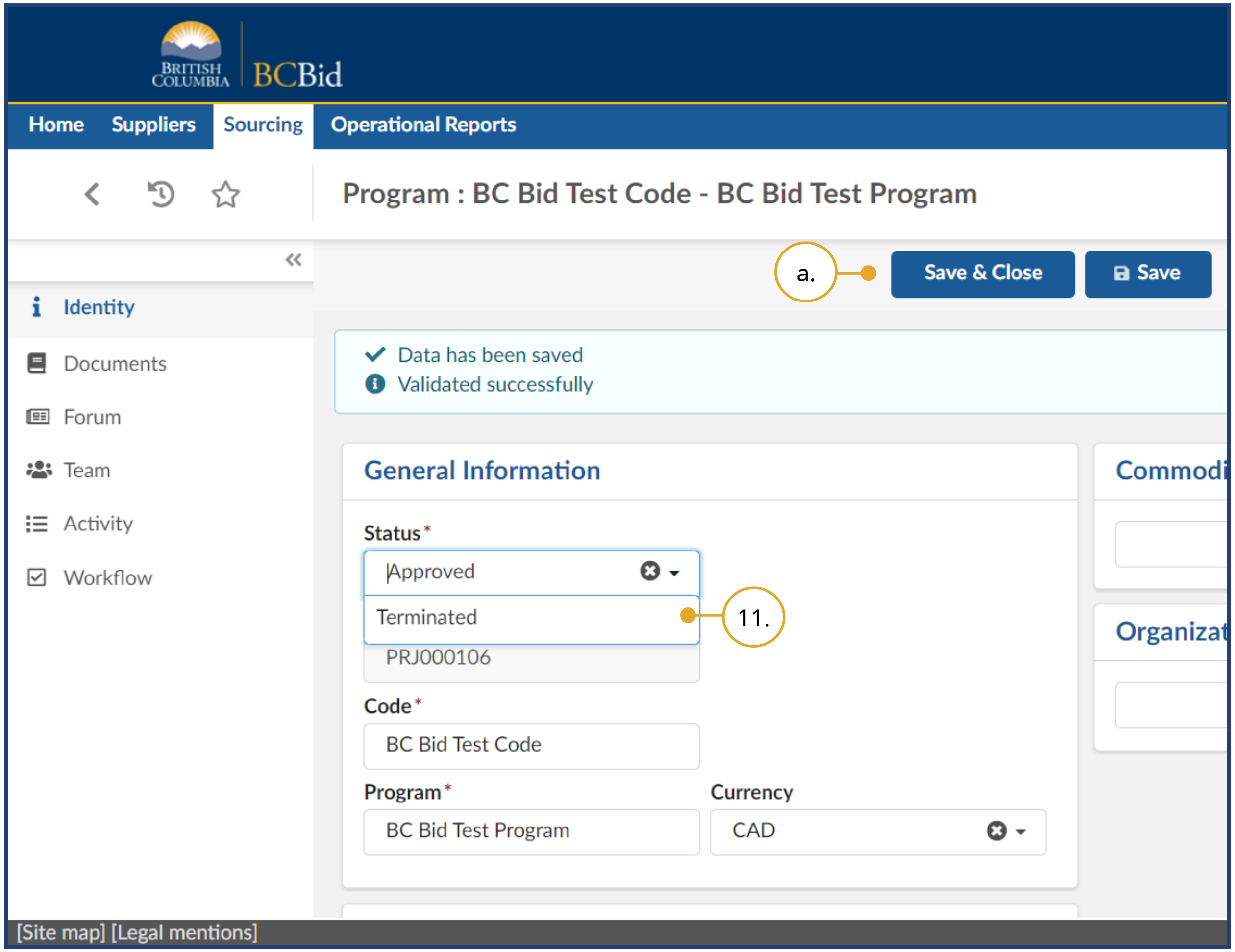
8. *Optional*: Use the **Activity** menu to track opportunities linked to the program.
9. *Optional*: Click the **Workflow** menu to see the actual workflow.



10. Click **Initiate Approval Process** to start the workflow.

    Note: After clicking Initiate Approval Process, the Status of the Program will change to 'Approval in progress'. To update the Status to 'Approved', click **Approve**. Only 'Approved' programs can be linked to an opportunity.
    Then click **Save & Close**.

Terminating a Program



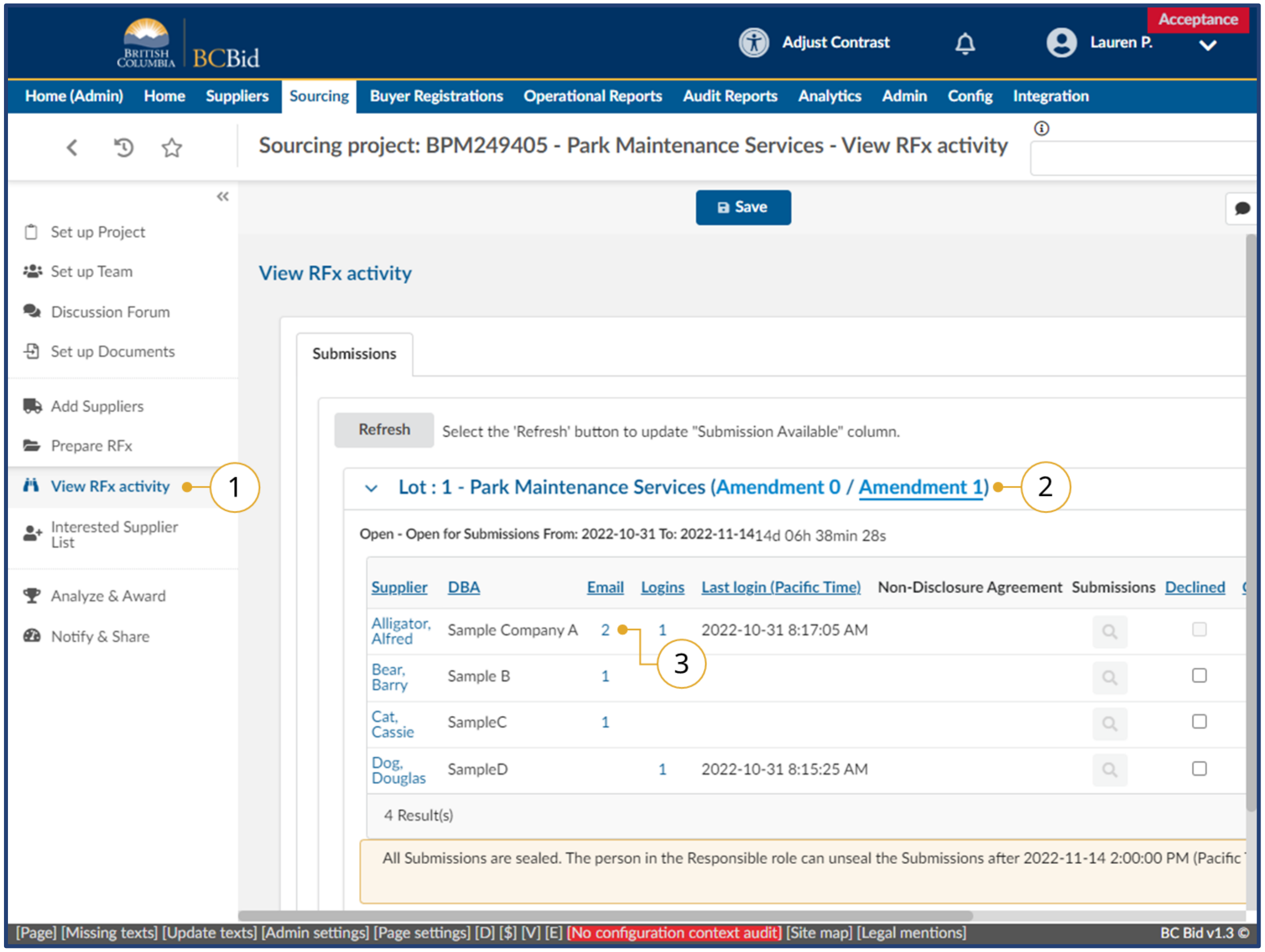
11. *Optional*: To change the status of a program from 'Approved' to 'Terminated', select **Terminated** from the Status drop-down.

a. Click **Save & Close**.

Note: This removes the program from being connected to future sourcing projects and can be done either by the user responsible for the program or an Administrator.

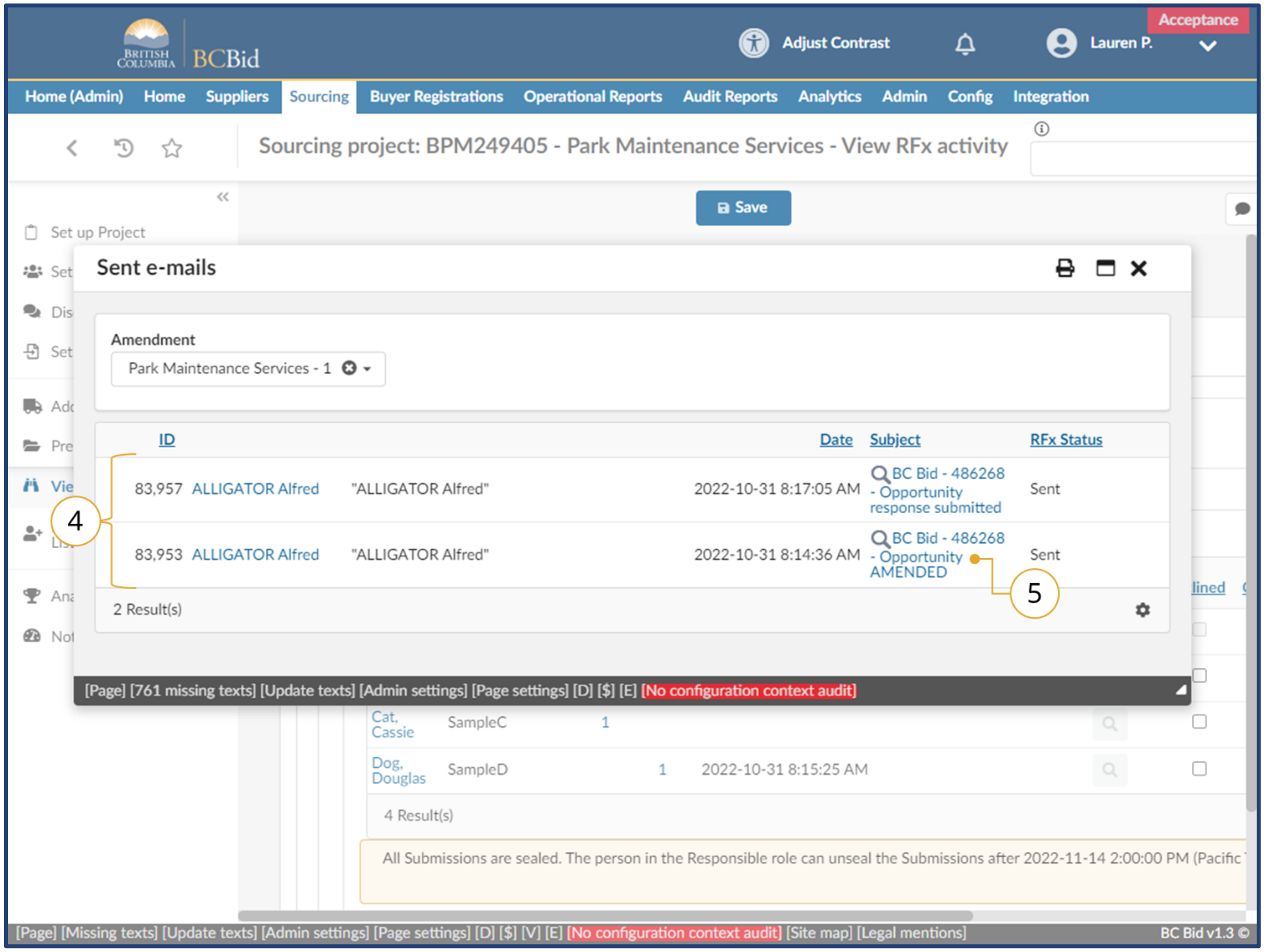
View Supplier Email History

Buyers can view the emails sent from BC Bid to a supplier. Suppliers may receive a different number of notifications from one another depending on when they click Start Submissions or other notifications they receive such as e-Bidding confirmation.

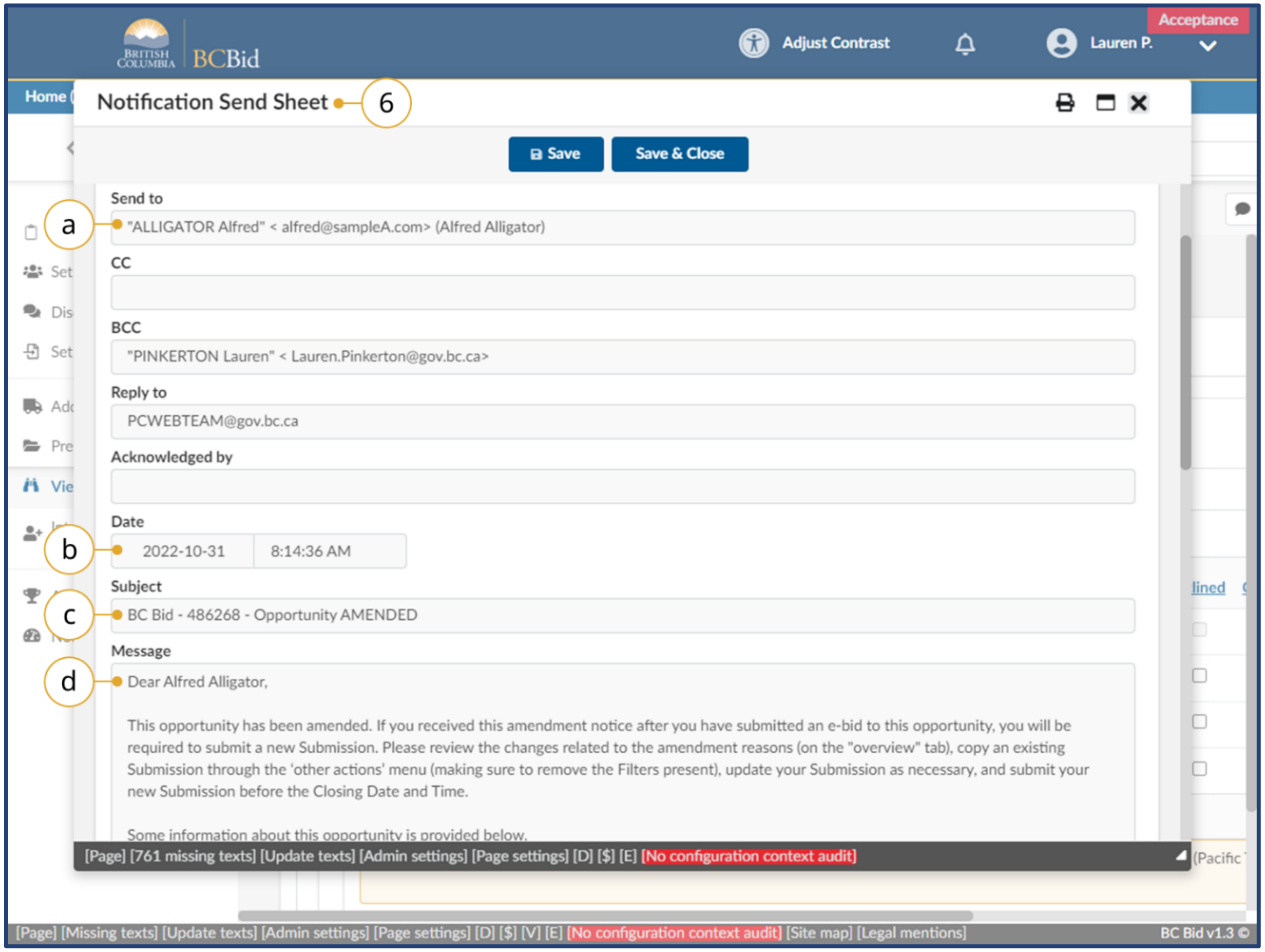


1. Click on **View RFx Activity**.
2. Choose amendment version to view.
3. Click on the **number** in the Email column.

Note: Suppliers may have received a different number of email depending on when they clicked the Start Submission button.



4. In the **Sent emails** dialog box, view a listing of the emails sent to the selected supplier.
5. Click on the **subject** to view the email.



6. In the Notification Send Sheet dialog box to view the desired information.
   a. Send to – the email address the notification was sent to.
   b. Date – the date and time the email was sent.
   c. Subject – the subject line of the email.
   d. Message content – content of the message.

Appendix 1: Help Desk

BC Bid 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

View the Help Desk on the BC Bid Public Portal: www.bcbid.gov.bc.ca.

Explore the BC Bid user guides on BC Procurement Resources.

BCeID Help Desk

Help desk hours: 7:30 am to 5:00 pm
Monday to Friday

Help Request: Online Form

Contact the help desk by phone:
Canada and USA toll free: 1-888-356-2741
Within the lower mainland or outside Canada and USA: 604-660-2355

Appendix 2: Training Video Links

Video Name	URL (Link)
Navigating the Public Portal	https://youtu.be/W4_k_s6SoPs
BPS Registration	https://youtu.be/WMCXIBuWSZE
Login and How the Buyer Dashboard works	https://youtu.be/IYFQrrJeP2A
Exploring Opportunities	https://youtu.be/cPG8eZrDiiI
How to Create a Sourcing Project	https://youtu.be/PkF7Efs9PqI
Commodity Codes	https://youtu.be/oWN_6NYYq3E
Copy Sourcing & Status	https://youtu.be/OebNeX1BHu4
Set up Team	https://youtu.be/PCAxNIQJPOw
How to use the Discussion Forum	https://youtu.be/730QwYbAo7o
Set up Documents overview	https://youtu.be/nvIgeU-vQaY
Add Suppliers overview	https://youtu.be/nA6y9AYxpWY
Removing Suppliers and Extracting a Supplier list	https://youtu.be/UxQPRLiUPyg
Creating a new Supplier	https://youtu.be/tLIDSA5QRSk
Additional RFx Info	https://youtu.be/ikJIoej-_JU
How to transfer documents from Set up Documents tab	https://youtu.be/PDQ95HzdTjo
Issuing an Opportunity	https://youtu.be/8NaMpMVGWmo
Issuing an Amendment	https://youtu.be/zk8HO1JIiQo
Issuing an Addendum	https://youtu.be/rbT6gU7o9a4
Viewing Interested Supplier List	https://youtu.be/XZrvG1FkJr4
Uploading Submissions	https://youtu.be/_KuG95TsMWM
Unsealing and Downloading Submissions	https://youtu.be/SebnImDbboI
Unverified Bid Results	https://youtu.be/EXRTdqVeDRs
Awarding a Contract/Shortlisting	https://youtu.be/apHKSBzsSKI
Sending List Results Notification to Suppliers	https://youtu.be/6XNs49rH1oI
Sending Award Results Notification to Suppliers	https://youtu.be/VeTR7t2pvlY

Video Name	URL (Link)
Creating a Contract Award Summary	https://youtu.be/ypD5hRRXqMs
Completing an Opportunity	https://youtu.be/e871xjwU-s8
How to create a new Lot	https://youtu.be/jqZBLUrNgeI
Closeout a Sourcing Project	https://youtu.be/cnEJSl_Uk7o
Creating a Contract Award Notice	https://youtu.be/lvdfwNE6zUo
How to explore Contract Awards	https://youtu.be/oGLbRCO8GfA
How to create a Program	https://youtu.be/BweOKTfZC2o

Appendix 3: Operational Reports

Operational Reports are self-serve in BC Bid application: users do not need to contact BC Bid Help Desk to run these reports. After refining the search parameters, the application will generate a spreadsheet that can be downloaded and saved.

Note that results for each report will be constrained by the user's organization. For example, if the user is assigned to a branch, the application will return results specific to that branch.

Each report has Parameters (filters) that the user must select before clicking the Extract button. Do not click the Print icon in the Run Query interface: it prints the interface box and not the report.

Depending on your browser settings, the results (in .xlsx format) will save to you Downloads folder or you will be prompted to save the file.

Available Reports

Report	Description
Unverified Bids Results Report	A report displaying all bids per Opportunity, within a date range. Filterable by Issued By, Issued For and Opportunity ID - if you just want to see unverified bids for one Opportunity.
Report on Awards	A report displaying sourcing award information for posted opportunities, within a date range. Filterable by Issued By and Issued For.
Posted Opportunities Details Report	A report displaying details of posted Opportunities between, within a date range. Filterable by Issued By and Issued For.
Opportunities e-Bid vs Manual Bid by Closing Date Report	A report displaying details of showing numbers of e-Bid versus Offline bids, within a date range, and for one or more RFx type(s). Filterable by Issued By and Issued For.

Appendix 4: Opportunity (RFx) Status

The RFx Status indicates to buyers and suppliers the status of the opportunity. Some of the RFx Status changes happen automatically, for example when an open opportunity closes at the specified date/time. Other RFx Status changes are based on the user with the Responsible role clicking a button beside the RFx Status.

Draft

All opportunities begin in **Draft** status. When opportunities are in draft, they can be edited.

Open

The opportunity is **Open** (posted) and available for suppliers on the public portal (or to the selected suppliers). An opportunity is open when the current date is between the Issue date and the closing date.
When in **Open** status, the cancel button is visible beside the RFx Status (for Responsible role only).

Closed

Once the closing date has passed, the opportunity will automatically move to **Closed** status (unless the auto-close checkbox has been deselected).
When in **Closed** status, the cancel and complete buttons are visible beside the RFx Status (for Responsible role only).

Processing

Once the submissions have been unsealed by the Responsible role, the opportunity will automatically change to **Processing** status. This is when submissions can be downloaded, the opportunity can be awarded, and successful/unsuccessful notifications sent to suppliers.
When in **Processing** status, the cancel and completed buttons are visible beside the RFx status (for Responsible role only).

Completed

Once the opportunity has been processed, suppliers notified of the end result and, if applicable, the contract award notice as been posted the user with the Responsible role can click the **Completed** button beside the RFx Status.
One the Completed button has been selected and the action confirmed by selecting OK, the action cannot be undone.

Cancelled

When an opportunity is in **Open**, **Closed**, or **Processing** status, the cancel button is visible beside the RFx Status for the user with the Responsible role only..
One the **Cancelled** button has been selected and the action confirmed by selecting OK, the action cannot be undone.

The statuses referred to are the **RFx Statu**s located on the **Prepare RFx Setup** tab. These are different from the **Sourcing Project status** located on the **Set up Project** tab.

Appendix 5: Sourcing Project Team Roles

When users are added to a Sourcing Project's Set up Team tab, they are assigned a role that provides different levels of access to the Sourcing Project and the opportunities within.

Responsible

- Edit the sourcing project
- The only one who can add members to Set up Team tab
- Send and receive Discussion Forum messages
- 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)
- The only one who can delete a draft RFx
- The only one who can issue (post) opportunities
- Create an amendment (some opportunity types only responsible can create the amendment)
- The only one who can issue an amendment
- Can edit an amendment in draft status
- Enter supplier offline submissions
- The only one who can unseal supplier submissions
- View and download supplier submissions (once unsealed, if applicable)
- Can award a decision
- Can shortlist suppliers from an opportunity
- Send successful and unsuccessful notifications
- Create the contract award summary
- Create a new (draft) lot

Official Contact

- Edit the sourcing project
- Send and receive Discussion Forum messages
- The only one who can 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)
- Edit an amendment in draft status
- Enter supplier offline submissions
- View and download supplier submissions (once unsealed, if applicable)
- Create the contract award summary
- Create a new (draft) lot

Contributor

- Edit the sourcing project
- Send and receive Discussion Forum messages
- 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)
- Edit an amendment in draft status
- Enter supplier offline submissions
- View and download supplier submissions (once unsealed, if applicable)

- Can award a decision
- Can shortlist suppliers from an opportunity
- Send successful and unsuccessful notifications
- Create the contract award summary
- Create a new (draft) lot

Read-only

- Can view the entire sourcing project
- Can send messages in the discussion forum
- Can issue addenda in the discussion forum
- Can view supplier submissions once unsealed (once unsealed, if applicable)

Activities not tied to a role (not part of a Sourcing Project)

- Create a program
- Contract award notice
- Create a supplier (from supplier menu)

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, if applicable)	✓	✓	✓	✓	Continuous intakes do not require unsealing
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	✓	✓	✓	-	

* 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.

Appendix 6: Registration Messages

Thank you for registering

Thank you for registering. Please check your email.

Basic BCeID Registrants: To complete your BC Bid registration, please open the confirmation email we just sent you, and click on the link. Once you have completed this last step, the BC Bid Help Desk will activate your account and send you an email to confirm.

IDIR Registrants: Registration with BC Bid is now complete, and your Buyer Account has been created. Check your email for a record of your registration. Note that this may take up to two business days.

Your BC Bid Buyer registration has been received

Dear Buyer Registrant,

If you are a IDIR Registrant: Your BC Bid Buyer registration has been received and is under review.

If you are a BCeID Registrant: Your BC Bid Buyer registration has been received. To complete your registration, please log in to BC Bid using your Basic BCeID. When you attempt to log in to BC Bid you will receive an “access denied” message. Despite this message, your request for registration at that point will be reviewed by the BC Bid Help Desk.

Best regards,
BC Bid
bcbid.gov.bc.ca
This is an automatically generated email, please do not reply.

Access denied to BC Bid

Access denied to BC Bid.

Business BCeID Registrations: Your new **BC Bid** account is being reviewed for activation. You will receive an email when complete.

Basic BCeID Registrations: Your new **BC Bid** account is being reviewed for activation. You will receive an email when complete.

To register for a Supplier or Buyer account, visit the BC Bid Portal for more information.

Your BC Bid Buyer registration has been accepted

Dear Buyer,

Your BC Bid Buyer registration has been accepted.
Please log in to BC Bid using your IDIR or Basic BCeID account.

Forgot your BCeID password?

Best regards,
BC Bid
bcbid.gov.bc.ca
This is an automatically generated email, please do not reply.

Your BC Bid Buyer registration requires follow up

Dear Buyer Registrant,

Your BC Bid Buyer registration requires a follow-up conversation.

Please contact the BC Bid Help Desk.
250-387-7301
8:30am - 4:30pm Monday-Friday

Best regards,
BC Bid
bcbid.gov.bc.ca
This is an automatically generated email, please do not reply.