

BCBid

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

Introduction

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

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

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

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

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

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

How to Use this Guide

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

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

Information Icons

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



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



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



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

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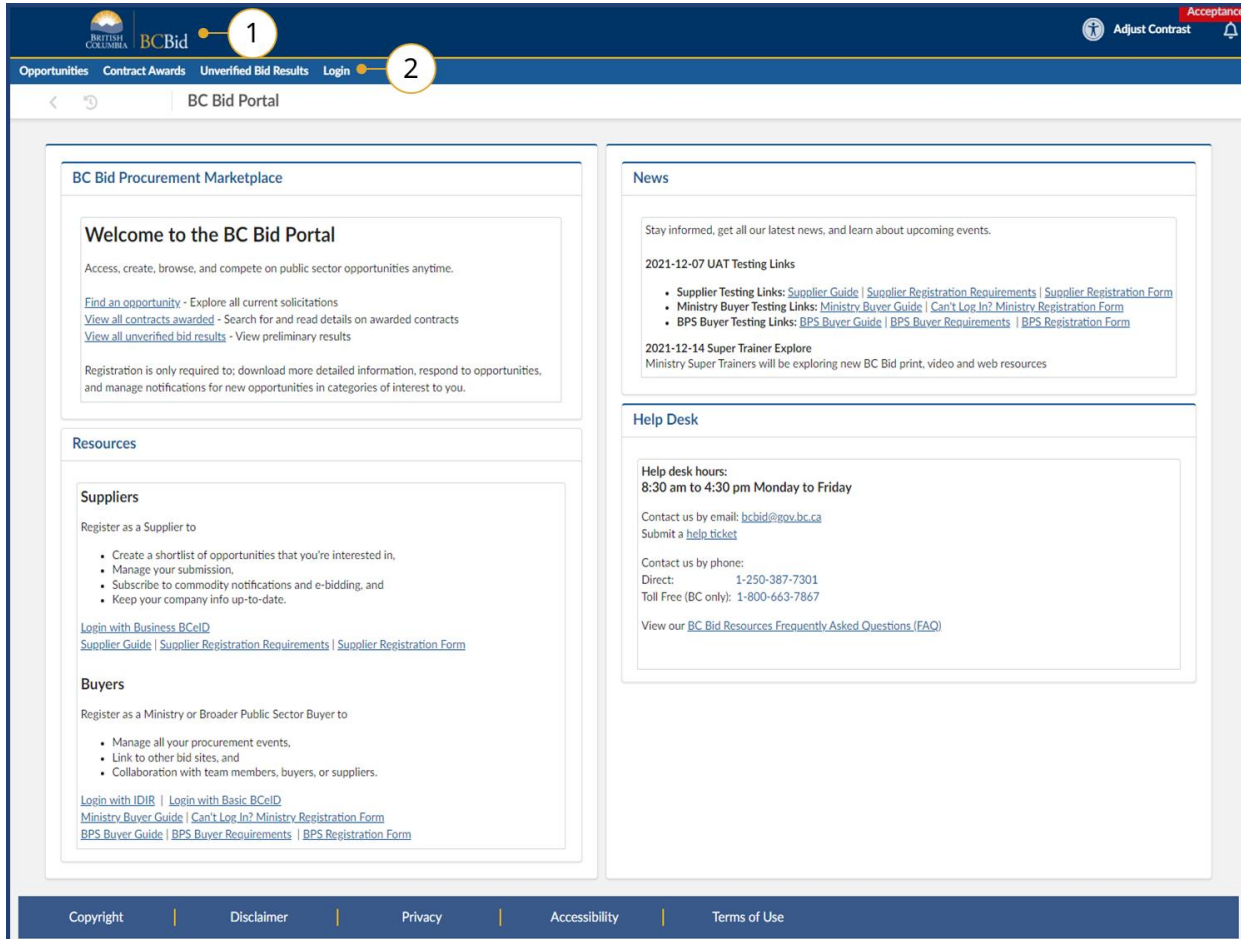
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Reset Password

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

Login



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

Log in to sfstest7.gov.bc.ca

Log in with IDIR

IDIR Username

Password

Continue

Or log in with:

Log in with BCeID

Need help?

Contact your IDIR security administrator or the 7-7000 Service Desk at:
 Phone: 250-387-7000
 Email: 77000@gov.bc.ca

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

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3. Enter **IDIR Username** and **Password**.
4. Click **Continue**.
 You will be directed to the Buyer Portal dashboard.



[Login and Buyer Dashboard](#)

Registration

The screenshot shows the BC Bid Buyer Registration form. At the top right, there is an 'Acceptance' button and an 'Adjust Contrast' link. The navigation bar includes 'Opportunities', 'Contract Awards', 'Unverified Bid Results', and 'Login'. The page title is 'Buyer Registration'. A 'Submit' button is circled with a '2'. The 'Personal Information' section is circled with a '1' and contains the following fields: First name*, Last name*, Position/Title*, Telephone (E.g. 1-777-888-9999 ext 1234)*, and E-mail Address*. A note states 'BASIC BCeID REQUIRED' and provides instructions. Below the personal information is an 'Address' section with a map.

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

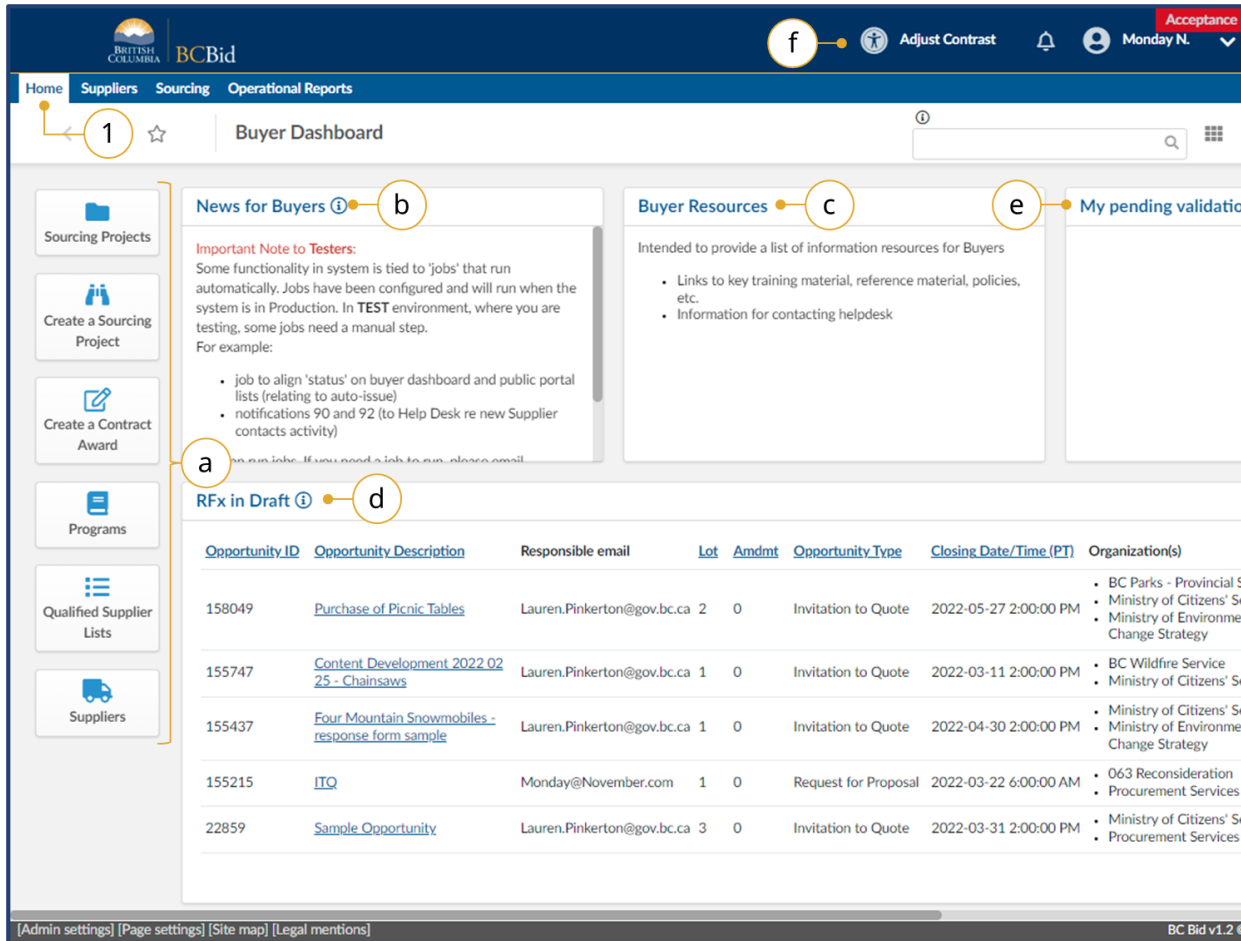
- You may have moved position in the B.C. government;
- Your name has changed; or
- You are a contractor with a new IDIR or BCeID.

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

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

Buyer Portal

Home – Buyer Dashboard



1. Navigate to the **Home** tab to see the **Buyer Dashboard**.
 - a. Select a **Quick Access** button to navigate to quickly start a task in BC Bid.
 - b. Check the **News for Buyers** for important news about BC Bid.
 - c. Check **Buyer Resources** for important information.
 - d. Check **RFX in Draft** to review opportunities that are currently in draft format.
 - e. Check **My pending validations** to see if there are any validations pending approval.
 - f. Select **Adjust Contrast** to change the theme for accessibility.

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

Frequently Asked Questions (FAQs)

Q: What is the status of my purchase?

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

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

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

Q: Who at PSB is responsible for my purchase?

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

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

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

Q: When will my opportunity close?

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

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

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

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

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

Q: How are Direct Awards processed in BC Bid?

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

Q: Where are the supplier submissions located?

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

Q: What suppliers have seen my opportunity?

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

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

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

Q: What documents are included in my opportunity?

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

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

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

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

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

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

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

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

Requisition Import

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

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

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

Search for Opportunities

The screenshot shows the BCBid web application interface. The top navigation bar includes 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The 'Sourcing' menu is open, showing options like 'Sourcing Projects', 'Create Sourcing Project', 'Qualified Supplier Lists', 'Programs', 'Contract Awards', 'My Contract Award Notices', 'Create Contract Award Notice', and 'Unverified Bid Results'. A red circle with the number '1' highlights the 'Sourcing Projects' option. Below the menu, there are buttons for 'Create a Sourcing Project', 'Create a Contract Award', 'Programs', 'Qualified Supplier Lists', and 'Suppliers'. The main content area displays 'Buyer Resources' and a table titled 'RFx in Draft'.

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

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



[Exploring Opportunities](#)

The screenshot displays the 'Sourcing Projects' page in the BC Bid system. At the top, there are navigation tabs for Home, Suppliers, Sourcing, and Operational Reports. The main search area includes fields for 'Search by keyword', 'Commodity', 'Sourcing Project Type', and 'Status'. Below these are 'Opportunity ID' (with callout 'a'), 'Organization', 'Opportunity Type' (set to 'Invitation to Quote'), and 'RFX Status'. A 'Limit to my scope' checkbox is checked (callout '2'). A 'Search' button (callout 'b') and a 'Reset' button (callout '4') are also present. Below the search filters, a 'Filters' bar shows the active filters: 'Limit to my scope: ✓', 'Opportunity ID: 5076807 ×', 'Opportunity Type: Invitation to Quote ×', and 'Include Historical: ✓'. A 'Create Project' button is visible above a table of results. The table has columns for Label, Opportunity ID, Code, Project Type, Opportunity Type, RFX Status, Date Created, Commodity, and Organization. One result is shown: 'Bricks for Superior Street Project' (callout '3') with Opportunity ID 5076807, Code BPM249144, Project Type Strategic (Multistage), Opportunity Type Invitation to Quote, RFX Status Deleted and Processing, Date Created 2022-09-02, Commodity Bricks, and Organization Finance and Citizens Services, Procurement Services Branch. A '1 Result(s)' indicator is at the bottom of the table. The footer contains links for Admin settings, Page settings, Site map, and Legal mentions, along with the version number BC Bid v1.3.

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

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

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

View Sourcing Project

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

Set up Project

The screenshot displays the 'Set up Project' interface for a sourcing project. The main content area is titled 'Set up Project' and contains a 'General Information' section. The fields and their values are as follows:

- Code:** BPM249144
- Sourcing Project Type:** Strategic (Multistage)
- Status:** In progress (highlighted with callout 'a')
- Opportunity Description:** Bricks for Superior Street Project (highlighted with callout 'b')
- Date Created:** 2022-09-02
- Confidential Sourcing Project:**
- Issued By:** Procurement Services Branch (highlighted with callout 'c')
- Issued For:** Finance and Citizens Services (highlighted with callout 'c')
- Main Commodity:** 30131600 - Bricks (highlighted with callout 'd')
- Program:** ITQ_PSB - PSB: ITQ for Goods
- Other Commodities:** (Empty field)

The sidebar on the left contains the following navigation options:

- Set up Project (highlighted with callout '1')
- Set up Team
- Discussion Forum
- Set up Documents
- Add Suppliers
- Prepare RFx
- View RFx activity
- Interested Supplier List
- Analyze & Award
- Notify & Share

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

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

Set up Team

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

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



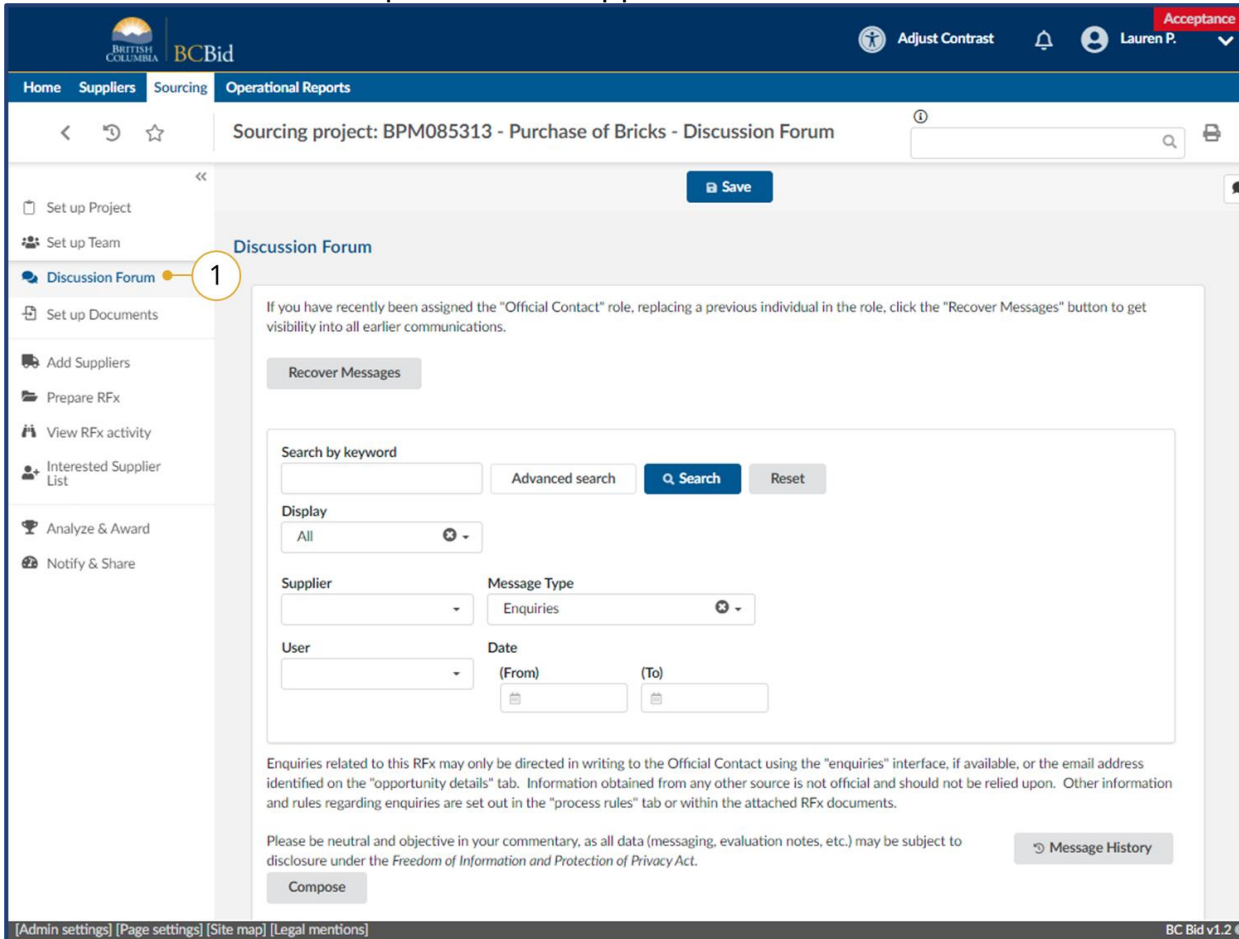
[Set up Team](#)



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

Discussion Forum

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



The screenshot shows the BC Bid web application interface. The top navigation bar includes 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The user is logged in as 'Lauren P.' with an 'Acceptance' status. The left-hand menu is expanded, and 'Discussion Forum' is highlighted with a red circle and the number '1'. The main content area is titled 'Discussion Forum' and contains a 'Save' button, a 'Recover Messages' button, and a search section. The search section includes a 'Search by keyword' input field, an 'Advanced search' button, a 'Search' button, and a 'Reset' button. Below the search section are filters for 'Display' (set to 'All'), 'Supplier', 'Message Type' (set to 'Enquiries'), 'User', and 'Date' (with 'From' and 'To' date pickers). A 'Compose' button is located at the bottom left of the main content area. A 'Message History' button is at the bottom right. The footer contains links for 'Admin settings', 'Page settings', 'Site map', and 'Legal mentions', along with the version number 'BC Bid v1.2 ©'.

1. In the left-hand menu click **Discussion Forum**.
The Discussion Forum is used for internal communication among buyers and external communication between the Official Contact and suppliers. It is also used to issue Addenda.



[How to use the Discussion Forum](#)

Create a New Message

The screenshot displays the BC Bid web application interface. At the top, there is a navigation bar with the BC Bid logo and user information for Lauren P. The main content area is titled 'Discussion Forum' for the project 'Sourcing project: BPM085313 - Purchase of Bricks'. A sidebar on the left contains various project management options. The central panel includes a 'Recover Messages' button, a search section with a 'Search by keyword' field and 'Advanced search', 'Search', and 'Reset' buttons. Below the search section are filters for 'Display' (set to 'All'), 'Supplier', 'Message Type' (set to 'Enquiries'), and 'User'. A 'Date' filter is also present with 'From' and 'To' date pickers. At the bottom of the central panel, there is a 'Compose' button, which is circled in red with the number '1' next to it, indicating the step to click 'Compose'. A 'Message History' button is also visible. The footer contains links for 'Admin settings', 'Page settings', 'Site map', and 'Legal mentions', along with the version 'BC Bid v1.2'.

1. Click **Compose**.

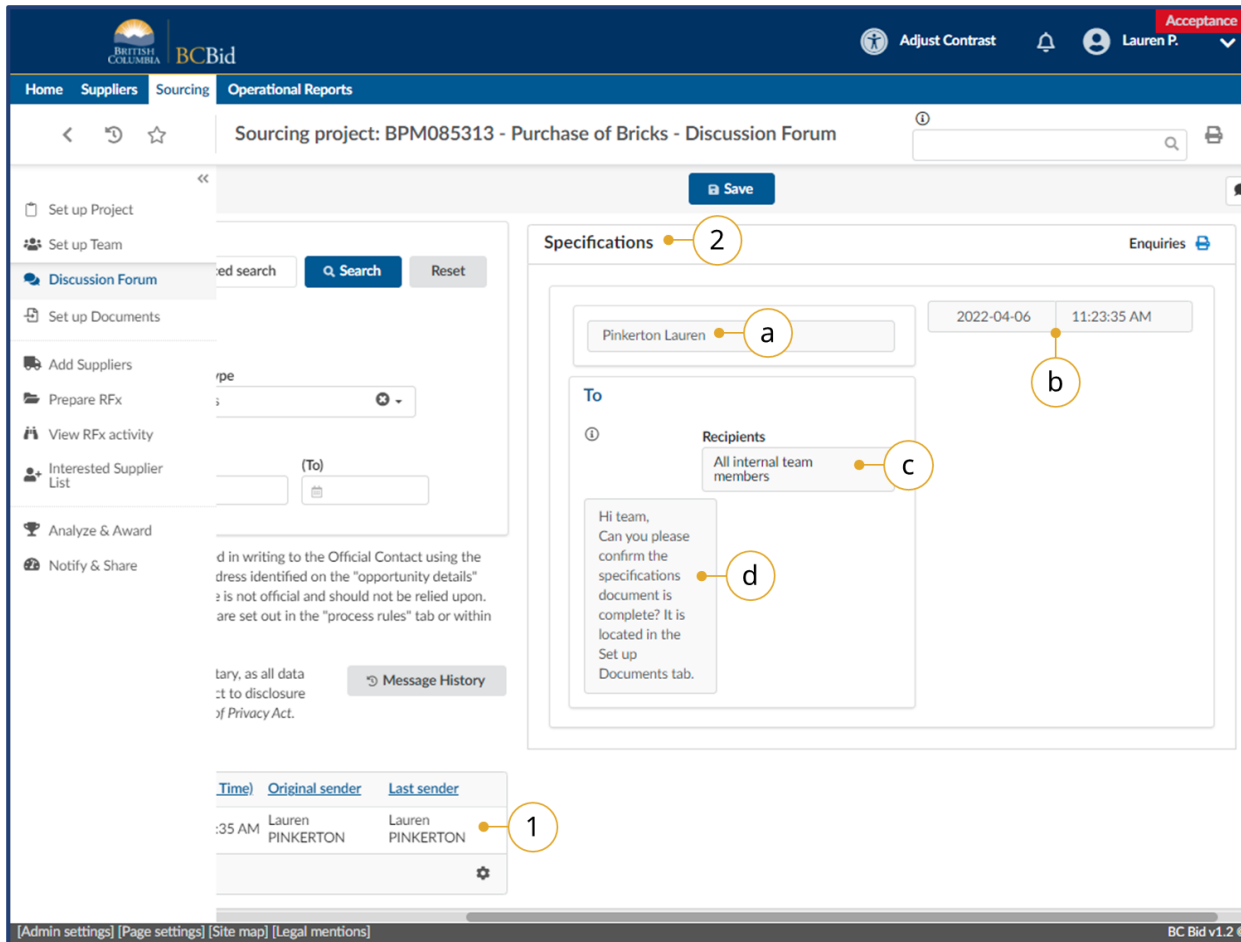
The message box will display on the right side of the screen.

The screenshot shows the BC Bid system interface for a sourcing project. The main content area is titled "Sourcing project: BPM249144 - Bricks for Superior Street Project - Discussion Forum". The interface includes a navigation menu on the left with options like "Set up Project", "Set up Team", "Discussion Forum", "Set up Documents", "Add Suppliers", "Prepare RFX", "View RFX activity", "Interested Supplier List", "Analyze & Award", and "Notify & Share". The "Discussion Forum" section is active, showing a message composition form. The form has several fields: "Message Type" (set to "Enquiries"), "To" (with a dropdown menu), "Subject" (set to "updated specifications"), and a text area (set to "see attached file for updated specifications"). There are also buttons for "Send" and "Cancel", and a file upload area with a "Specifications.xlsx" file attached. Numbered callouts (1-5) highlight specific elements: 1 points to the "Send me a copy" checkbox, 2 to the "Message Type" dropdown, 3 to the "To" dropdown, 4 to the "Recipients" dropdown, and 5 to the "Send" button.

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

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

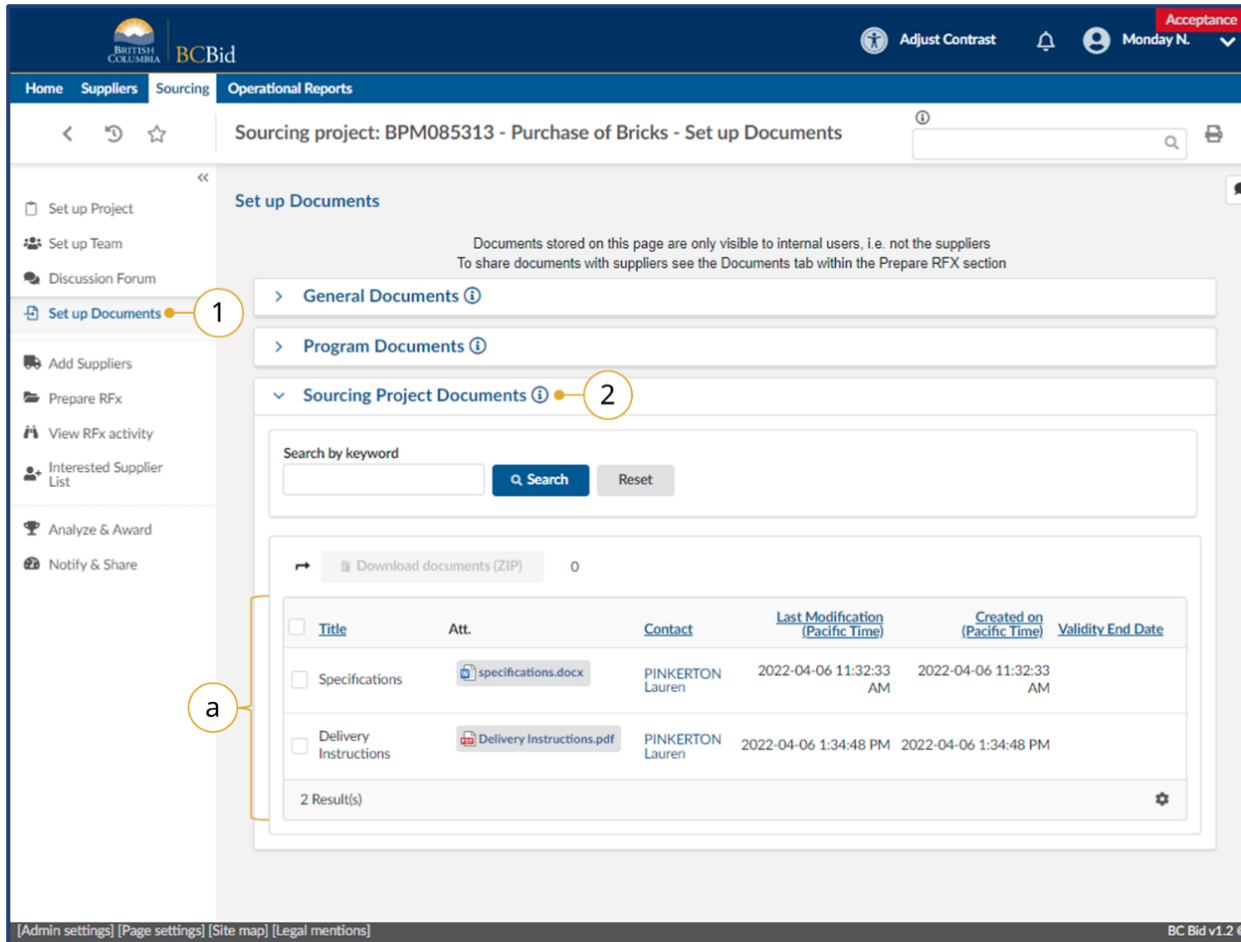
View a Message



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

Set up Documents

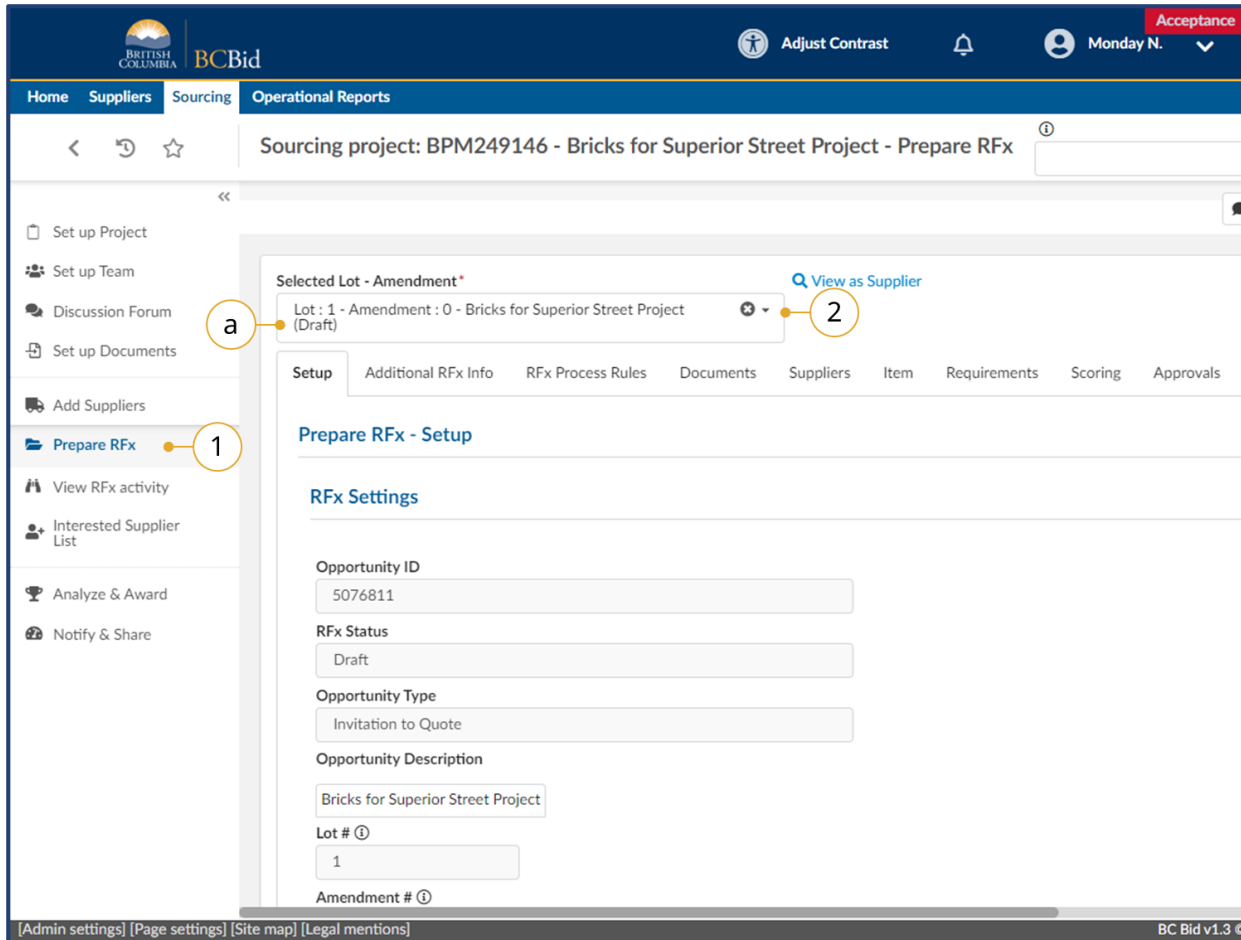
Documents can be added at the project level (Set up Documents) and at the opportunity level (Prepare RFX – Documents). Documents listed here may be internal or external. For a document to be visible to a supplier it needs to be in approved status and added to an opportunity. General and Project documents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



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

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

View Opportunity



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

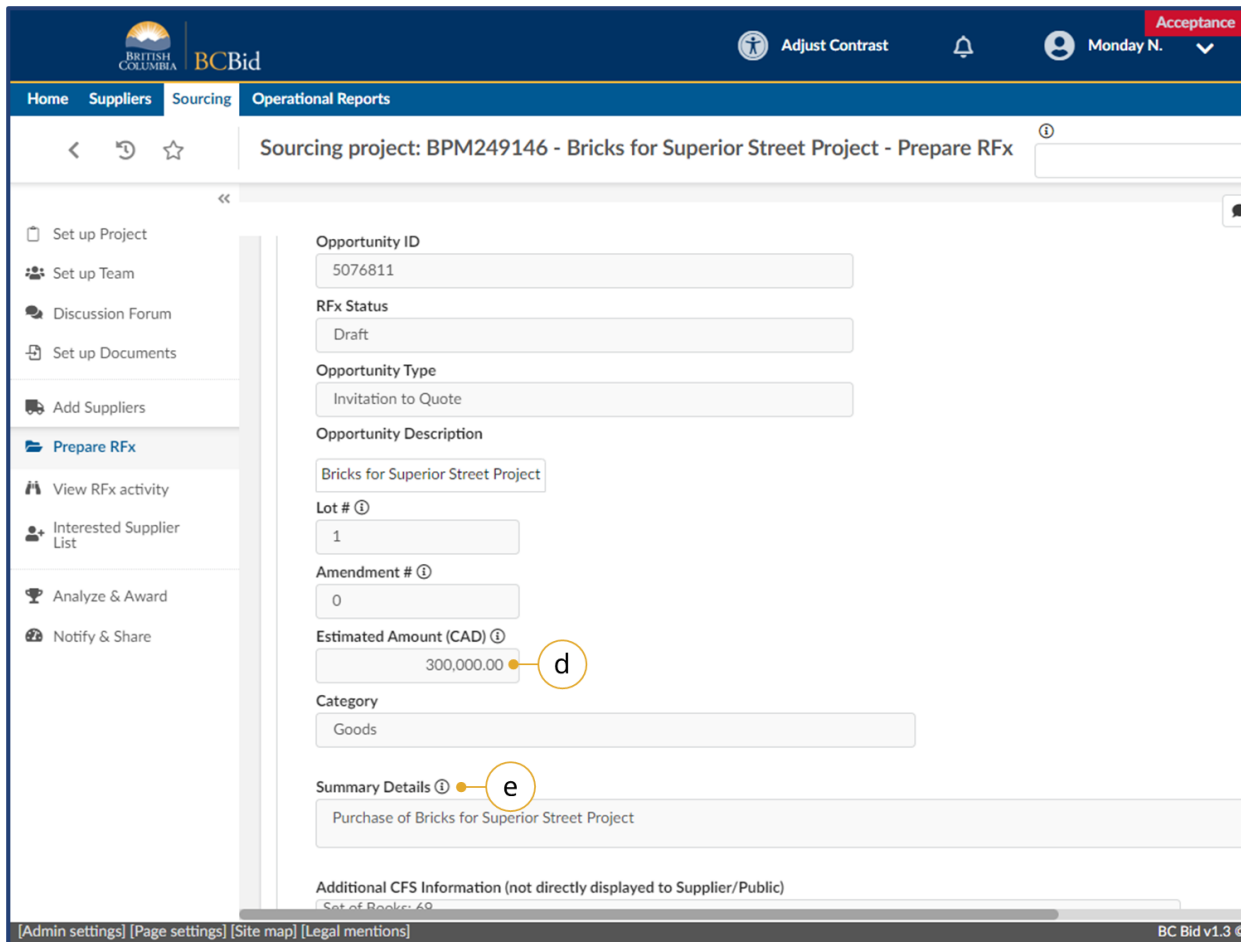
Prepare RfX - Opportunity Details

Setup tab

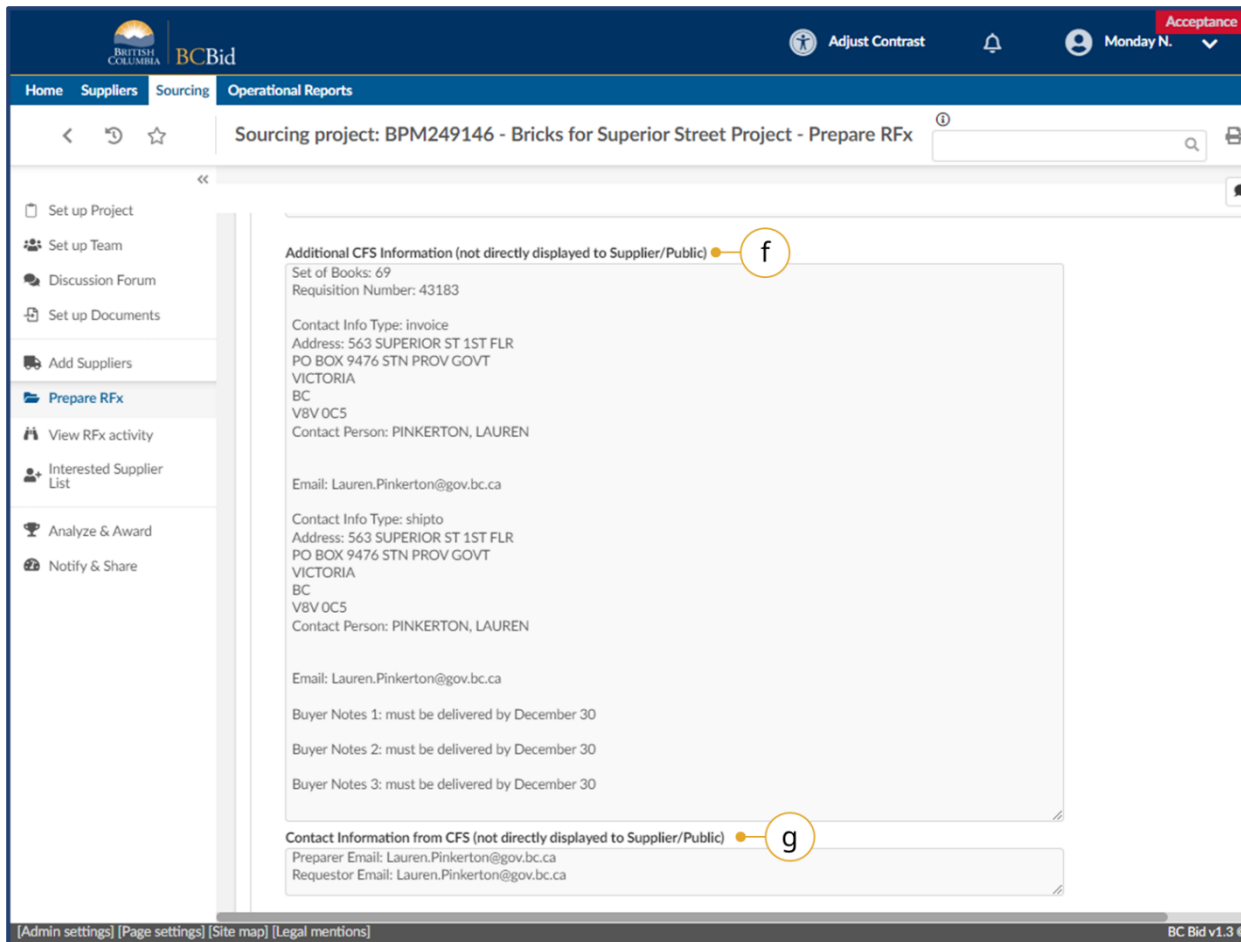
The screenshot shows the BCBid web application interface. The top navigation bar includes the BCBid logo, user profile, and date (Monday N.). The main navigation menu has tabs for Home, Suppliers, Sourcing, and Operational Reports. The current page is titled "Sourcing project: BPM249146 - Bricks for Superior Street Project - Prepare RfX". The left sidebar contains various project management tasks, with "Prepare RfX" selected. The main content area shows the "Setup" tab for the "Selected Lot - Amendment*" "Lot : 1 - Amendment : 0 - Bricks for Superior Street Project (Draft)". The "Prepare RfX - Setup" section includes the following fields:

- Opportunity ID: 5076811 (labeled 'a')
- RfX Status: Draft (labeled 'b')
- Opportunity Type: Invitation to Quote
- Opportunity Description: Bricks for Superior Street Project (labeled 'c')
- Lot #: 1
- Amendment #: (empty)

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



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



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

The screenshot displays the 'Sourcing project: BPM249146 - Bricks for Superior Street Project - Prepare RFx' page. The left sidebar contains navigation options like 'Set up Project', 'Set up Team', 'Discussion Forum', 'Set up Documents', 'Add Suppliers', 'Prepare RFx', 'View RFx activity', 'Interested Supplier List', 'Analyze & Award', and 'Notify & Share'. The main content area is divided into two sections:

- CFS Integration Information (h):** This section contains a table with the following data:

CFS Order Type	CFS Requisition	CFS Purchase Order		
Purchase Order	5076811			
Ministry	Responsibility	Account	STOB	Project
032	32P01	35102	5718	3200000
- Issue Date and Closing Date (times are shown in Pacific Time) (i):** This section includes:
 - Issue Date:** 2022-09-26 10:00:00 AM, with an for 'Auto issuing'.
 - Closing Date & Time:** 2022-10-06 2:00:00 PM, with a checked for 'Auto closure'.
 - Enquiries Deadline:** 12:00:00 AM.
 - RFX to be pre-advertised
 - NDA required from Suppliers

At the bottom, there is a 'Visible to Public' section with a checked for 'Post this opportunity publicly?'. The footer contains links for [Admin settings], [Page settings], [Site map], [Legal mentions], and the version 'BC Bid v1.3 ©'.

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

Additional RFX Info tab

The screenshot displays the BC Bid system interface for a sourcing project. The main content area is titled "Sourcing project: BPM247733 - 12345 - Purchase of Custom Picnic Tables - Prepare...". The "Additional RFX Info" tab is selected, and it contains the following sections:

- Official Contact**: A section with a table for contact information.

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

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

The screenshot displays the BC Bid web application interface. The top navigation bar includes the BC Bid logo, 'Adjust Contrast', a notification bell, and a user profile for 'Monday N.'. The main navigation menu shows 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The current page is titled 'Sourcing project: BPM249146 - Bricks for Superior Street Project - Prepare RFx'. A sidebar on the left lists various project management tasks, with 'Prepare RFx' highlighted. The main content area is titled 'Delivery Location for Goods, Services, or Construction' and contains the following sections:

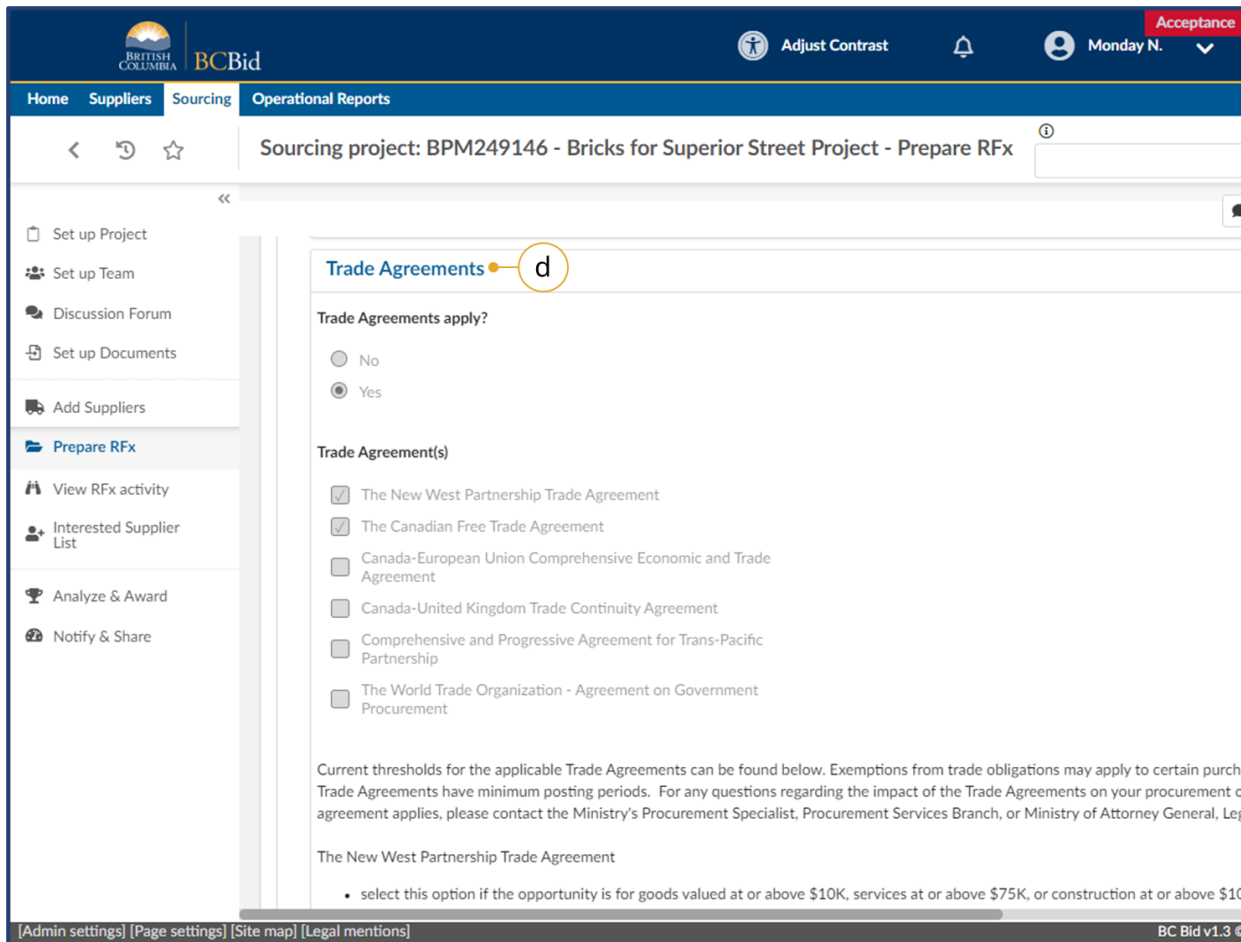
- For Goods:** Enter the street address where the supplier will deliver goods to.
- For Services (including IM/IT and Construction):** Enter the location where the supplier will carry out the work. This could be a street address, a municipality, geographic coordinates and/or service.
- 1. Enter address or geographic coordinates**
If there is more than one delivery location, add an appendix with all addresses to the "documents" tab, and make a note in the Additional Information field.

A map of the location is shown, with a red pin indicating the delivery location at 563 Superior St. Below the map are input fields for:

- Office Street Address: 563 Superior St
- Postal Code: V8V 1T7
- City: Victoria
- Country: (empty)
- State/Province: (empty)

At the bottom of the page, there are links for [Admin settings], [Page settings], [Site map], and [Legal mentions], along with the version number BC Bid v1.3 ©.

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



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

The screenshot displays the BC Bid web application interface. At the top, there is a navigation bar with the BC Bid logo, a search bar, and user information (Monday N.). Below the navigation bar, there is a breadcrumb trail: Home > Suppliers > Sourcing > Operational Reports. The main content area is titled 'Sourcing project: BPM249146 - Bricks for Superior Street Project - Prepare RFx'. On the left side, there is a sidebar menu with options like 'Set up Project', 'Set up Team', 'Discussion Forum', 'Set up Documents', 'Add Suppliers', 'Prepare RFx' (highlighted), 'View RFx activity', 'Interested Supplier List', 'Analyze & Award', and 'Notify & Share'. The main content area is divided into sections: 'Mandatory Criteria' (with a circled 'e' next to the title), 'Additional Mandatory Requirements', and 'Quotation Pricing Evaluation'. The 'Mandatory Criteria' section contains a list of requirements for the quotation to be considered.

Mandatory Criteria e

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

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

Additional Mandatory Requirements

Quotation Pricing Evaluation

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

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

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

RFX Process Rules tab

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

The screenshot displays the BCBid web application interface. At the top, there is a navigation bar with the BCBid logo, user profile, and 'Acceptance' status. Below this is a secondary navigation bar with tabs for 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The main content area shows a 'Sourcing project: BPM247733 - 12345 - Purchase of Custom Picnic Tables - Prepare...' with a 'Save and Close' button. A notification box states: 'Fields marked by an asterisk * are mandatory. All times are displayed as Pacific Time. Click on save to update your selections'. Below this, the 'Selected Lot - Amendment*' dropdown is set to 'Lot : 1 - Amendment : 0 - Purchase of Custom Picnic Tables (Draft)'. A horizontal menu contains 'Setup', 'Additional RFX Info', 'RFX Process Rules' (highlighted with a red circle and the number '1'), 'Suppliers', 'Item', 'Requirements', 'Scoring', and 'Approvals'. The 'RFX Process Rules' section is titled 'Prepare RFX - RFX Process Rules' and includes a 'Generate Process Rules' button. The main content area displays the 'ITQ Process Rules (Updated January 27th, 2021)' with a section titled '1 Definitions'. The definitions include: 'Throughout this ITQ, the following definitions apply (and the singular is interchangeable with the plural):', 'Addenda' means all additional information regarding this ITQ including amendments to the ITQ, 'Amendment' means a change to the ITQ that results in posting an updated version of the ITQ requiring Proponents to submit a new Quotation to the ITQ as, 'BC Bid' means BC Bid located at https://www.bcbid.gov.bc.ca, 'Closing Location' means, as applicable, BC Bid for the submission of Quotations as indicated on the BC Bid "Overview" menu tab, or the fax address, 'Closing Date and Time' means the closing time and date for this ITQ as set out in the general information section of the "Overview" menu tab, and 'Contract' means an agreement between the Province and a Contractor as a result of this ITQ, as further described in section 2.11. The footer contains links for 'Admin settings', 'Page settings', 'Site map', and 'Legal mentions', along with the version 'BC Bid v1.2'.

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

Documents tab

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

Save and Close

Setup Additional RFX Info RFX Process Rules **Documents** 1s Item Requirements Scoring Approval >

Prepare RFX - Documents

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

Search by keyword

0

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

2 Result(s)

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

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

Supplier tab

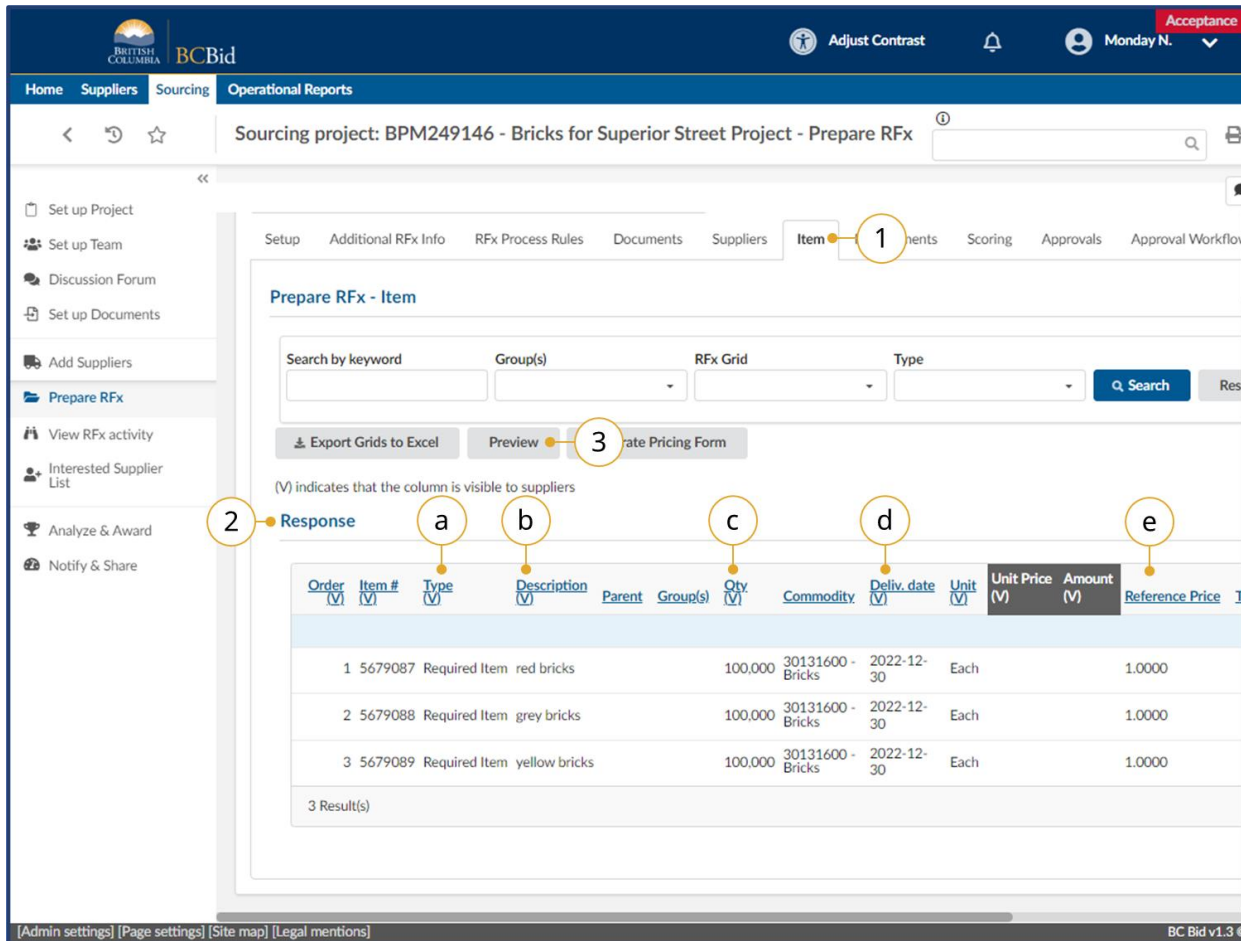
For most opportunities, the Public Portal will be selected. This posts the opportunity publicly on BC Bid. Suppliers will be listed here if they have clicked the **Start Submission** button or once the opportunity has closed and the Responsible person has entered the responses received from outside of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

The screenshot displays the BC Bid web application interface. The top navigation bar includes the BC Bid logo, user profile, and status (Monday N.). The main navigation menu on the left lists various project management tasks. The central content area shows the 'Suppliers' tab for a specific sourcing project. The 'Suppliers' tab is highlighted with a circled '1'. Below it, the 'Prepare RFX - Suppliers' section is highlighted with a circled '2'. This section contains a list of invited suppliers, with 'Public Portal' and 'Sample Company A' checked. A circled 'a' points to the 'Public Portal' entry. A dropdown menu is open, showing a list of suppliers: 'Public Portal', 'Sample Company A', 'Sample B', 'SampleC', and 'SampleD'. A circled 'b' points to the 'Public Portal' and 'Sample Company A' entries in the dropdown, and a circled 'c' points to the 'Sample B' entry.

1. Click on the Suppliers tab.
2. View the Suppliers who have been interacting with the opportunity.
 - a. When an opportunity is issued, the Public Portal is invited.
 - b. If an opportunity is a Direct Award, the invited supplier will be listed.
 - c. Once the opportunity is open, suppliers who are registered and click the **Start Submission** button will be listed.

Item tab

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



1. Click on the **Items** tab.
2. View the **Response** grid, all information is imported from the CFS requisition.
 - a. Type – required or optional item
 - b. Description – description of the item
 - c. Qty – how much of the item
 - d. Delivery date – the required by date from the requisition
 - e. Reference Price – the per unit pricing from the requisition
3. Click **Preview** to see the supplier view of the Pricing form.

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

Requirements tab

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

The screenshot shows the BCBid web application interface. At the top, there is a navigation bar with 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The 'Sourcing' tab is active, and the breadcrumb trail shows 'Sourcing project: BPM247733 - 12345 - Purchase of Custom Picnic Tables - Prepare...'. Below the breadcrumb, there is a 'Save and Close' button. The main content area is titled 'Prepare RFX - Requirements' and contains a 'Response Form Configuration' section. This section has a 'Preview' button circled with a '2' and a 'Generate Response Form' button. Below these buttons is a table with columns: 'Row/Answer Type', 'Section/Question', 'Required', 'Answer List', 'Multi-Answer', 'In scoring', and 'Scoring Type'. The table contains several rows for configuring requirements, such as 'Specifications', 'Does the product meet the stated specifications?', 'State warranty period', 'Delivery', 'Goods need to be delivered Monday - Friday between 9am and 3pm', and 'Proponent Identification'. The 'Required' column has checkboxes, and the 'Answer List' column has a 'Custom List' button. The 'Scoring Type' column has a 'Dropdown list' option.

Row/Answer Type	Section/Question	Required	Answer List	Multi-Answer	In scoring	Scoring Type
Section	Specifications	<input type="checkbox"/>			<input type="checkbox"/>	
List of values	Does the product meet the stated specifications?	<input type="checkbox"/>	Custom List	<input type="checkbox"/>	<input type="checkbox"/>	
Text	State warranty period	<input type="checkbox"/>			<input type="checkbox"/>	
Section	Delivery	<input type="checkbox"/>			<input type="checkbox"/>	
List of values	Goods need to be delivered Monday - Friday between 9am and 3pm	<input type="checkbox"/>	Custom List	<input type="checkbox"/>	<input type="checkbox"/>	
Section	Proponent Identification	<input type="checkbox"/>			<input type="checkbox"/>	Dropdown list
Text	FOR ATTENTION OF PROPONENTS THAT ARE SUBMITTING PROPOSALS THROUGH A SUBMISSION DELIVERY ROUTE OTHER THAN ELECTRONIC BIDDING THROUGH BC BID: You must include include the attached form with your proposal package. It must be signed	<input type="checkbox"/>			<input type="checkbox"/>	

1. Click the Requirements tab.
2. Click Preview to review the content of the supplier response form.

The screenshot displays the BC Bid web application interface. At the top, there is a navigation bar with 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The main content area shows a dialog box titled 'Response Form : Purchase of Custom Picnic Tables'. The dialog box has a sidebar on the left with sections: 'Overview', 'Specifications' (0/2), 'Delivery' (0/1), and 'Proponent Identification' (0/6). A green button labeled 'Complete Response Form' is located in the main area. Below it is an 'Export / Import' section with options to download in Excel 2007-2016 (xlsx) or Excel 97-2003 (xls) format, and a file upload area with a 307,200 kb limit. A red 'X' icon in the top right corner of the dialog box is circled with a '4'. A '3' is circled around the 'Specifications' section in the sidebar. At the bottom of the dialog box, there is a note: 'FOR ATTENTION OF PROPONENTS THAT ARE SUBMITTING PROPOSALS THROUGH A SUBMISSION DELIVERY ROUTE OTHER THAN ELECTRONIC BIDDING THROUGH BC BID: You must include include the attached form with your proposal package. It must be signed'. The footer of the page contains links for 'Admin settings', 'Page settings', 'Site map', and 'Legal mentions', along with the version 'BC Bid v1.2'.

3. Navigate through the Response Form sections to view the supplier response form.
4. Click X to close the dialog box

Addenda

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

The screenshot displays the BC Bid Discussion Forum interface. The left sidebar contains navigation options, with 'Discussion Forum' highlighted and circled with a '1'. The main content area shows a search bar and a table of addenda. The table has columns for 'Subject', 'Messages', 'Last update (Pacific Time)', 'Original sender', and 'Last sender'. A single addenda entry is visible, circled with a '2', with the following details:

Subject	Messages	Last update (Pacific Time)	Original sender	Last sender
Addenda # 1	0 / 1	2022-06-02 11:56:52 AM	Lauren PINKERTON	Lauren PINKERTON

Below the table, it indicates '1 Result(s)'. To the right, the content of the addenda is displayed, circled with a '3'. It shows the sender 'Pinkerton Lauren' and the date '2022-06-02'. The message content is as follows:

To

Recipients
All internal team members,
All invited suppliers

Q: Can the picnic tables me made of cedar?
A: Yes, cedar will meet the stated specifications.

1. Click on the **Discussion Forum** tab.
2. Click the message.
3. View the content of the message on the right side of the screen.

Amendments

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

The screenshot shows the 'Prepare RFX - Setup' page in the BC Bid system. The page is titled 'Sourcing project: BPM247849 - test - Prepare RFX'. The 'Selected Lot - Amendment*' dropdown is set to 'Lot : 2 - Amendment : 2 - Purchase of Custom Picnic Tables (Open)'. The 'Prepare RFX - Setup' section includes the following fields:

- Opportunity ID: 484257
- RFX Status: Open
- Opportunity Type: Invitation to Quote
- Opportunity Description: Purchase of Custom Picnic Tables
- Lot #: 2
- Amendment #: 2
- Amendment reason: change item quantity from 75 to 80

The Amendment History table is as follows:

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

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

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

Direct Awards

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

The screenshot displays the BCBid Sourcing project setup page for 'BPM249146 - Bricks for Superior Street Project - Prepare RFx'. The page is divided into several sections:

- Setup** (selected): Issue Date and Closing Date (times are shown in Pacific Time).
 - Issue Date: 2022-09-26, 10:00:00 AM. Auto issuing.
 - Closing Date & Time: 2022-09-29, 2:00:00 PM. Auto closure.
 - Enquiries Deadline: 12:00:00 AM.
 - RFx to be pre-advertised.
 - NDA required from Suppliers.
- Visible to Public**:
 - Public Portal.
 - Sample Company A.
 - Post this opportunity publicly?
- Sealed Submissions**: All Submissions are sealed. The person in the Responsible role can unseal the Submissions after the Closing Date and Time has passed.

Callouts in the image:

- 1: Add Suppliers tab in the left sidebar.
- 2: Prepare RFx tab in the left sidebar.
- 3: Issue Date and Closing Date section header.
- a: Callout box highlighting the 'Public Portal' and 'Sample Company A' checkboxes.

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

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

View RFx Activity

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

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

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

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

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

4 Result(s)

All Submissions are sealed. The person in the Responsible role can unseal the Submissions after 2022-06-10 2:00:00 PM (Pacific Time)

View Supplier Submissions

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

1. Click **View RFX Activity**.

2. Confirm that the opportunity has been unsealed.

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

5 Result(s)

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

View Selected Supplier

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

The screenshot displays the BC Bid system interface for a sourcing project. The main content area is titled "Notify & Share" and contains a section for "Notify Suppliers and Create a Contract Award Summary". Below this is a "Search Submissions" section with filters for "Supplier" and "Amendment". The "Decision" section shows "Unsuccessful" and "Selected" filters. The main table displays the following data:

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

Below the table, it indicates "3 Result(s)" and an "Items synthesis" section.

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

Supplier Submission

Submission Info

Response Form

Pricing

Save Save & Close

Submission Information

Opportunity ID
484107

Opportunity Description
Purchase of Custom Picnic Tables

Legal Name
Dog, Douglas

Doing Business as Name
SampleD

Submission Type
Original

Submission Status
Received

Offline Submission Receipt
12:00:00 AM

Offline Submission Entered
12:00:00 AM

Label
Submission # 1

Items synthesis

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

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

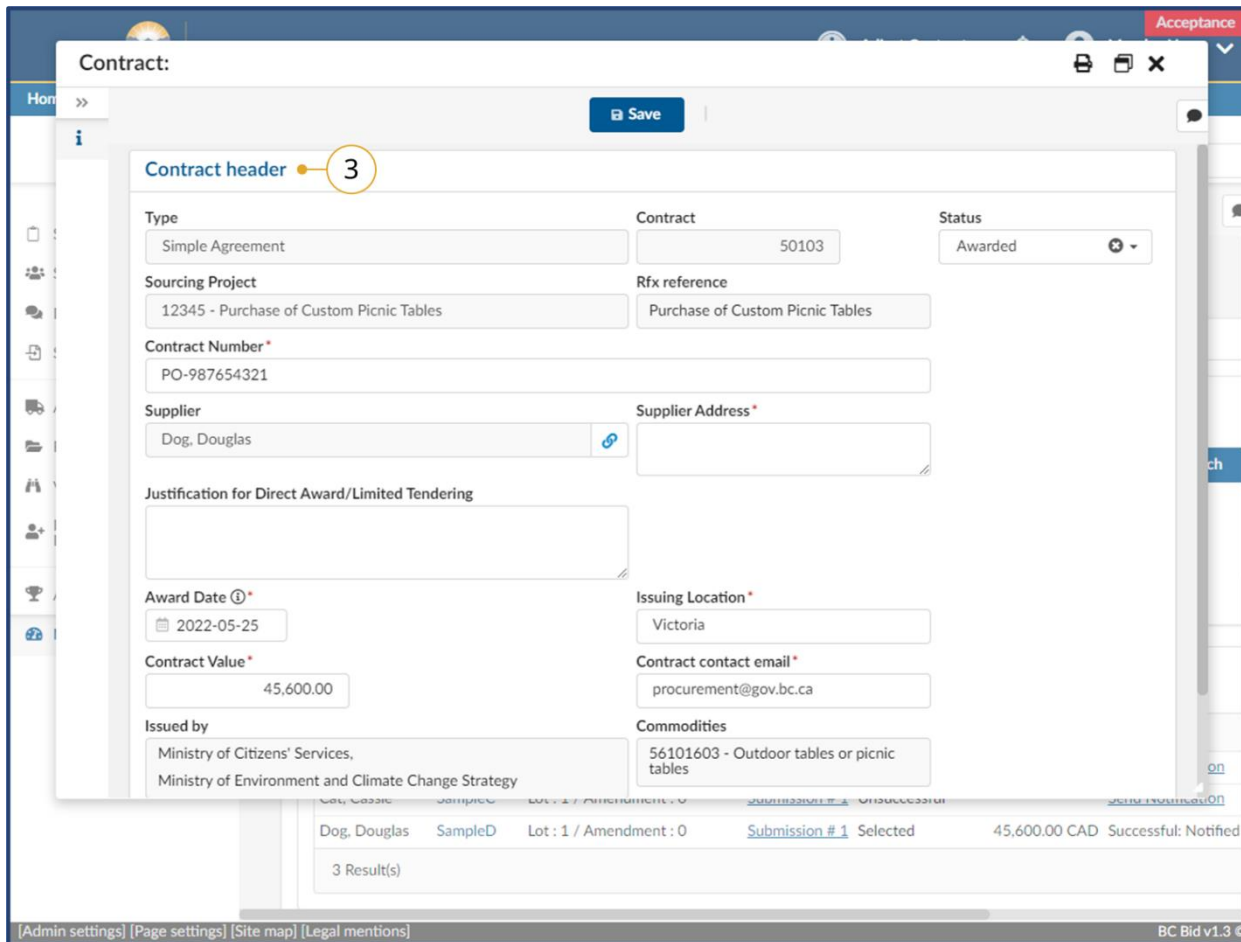
Award Info

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

The screenshot shows the BC Bid system interface. The top navigation bar includes 'Home', 'Suppliers', 'Sourcing', and 'Operational Reports'. The main content area is titled 'Notify & Share' and contains a section for 'Notify Suppliers and Create a Contract Award Summary'. This section includes a 'Search Submissions' form with fields for 'Supplier' and 'Amendment', and a 'Decision' dropdown menu. Below this is a table titled 'Notifications Sent (Selected and Not Selected)'. The table has columns for Supplier, DBA, Lot / Amendment, Submission, Decision, Award amount, Notification, and Contract Award Summary. The 'Contract Award Summary' column for the 'Dog, Douglas' row contains a link to a PO number, which is highlighted by a red circle '2'. The left sidebar contains various project management options, with 'Notify & Share' highlighted by a red circle '1'. At the bottom of the page, there are links for 'Admin settings', 'Page settings', 'Site map', and 'Legal mentions', along with the version number 'BC Bid v1.3'.

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

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



- In the dialog box, view the award information.

View Purchase Order Information from CFS

The screenshot shows the 'Operational Reports' page for a sourcing project. The 'Analyze & Award' tab is active. A sidebar on the left contains navigation options like 'Set up Project', 'Add Suppliers', and 'Analyze & Award'. The main content area includes a 'Selected Amendment' section, 'Scenarios' dropdown, and a search bar. Below these is a 'Generate PO(s)' button. At the bottom, a table displays project results with columns for RFX, Results Date/Time, BPM, CFS PO, and Results. Numbered callouts are placed over the 'Generate PO(s)' button (1), the 'CFS PO' column header (2), and the 'Results' column header (3).

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

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

Appendix 1: Provincial Help Desk

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

Email Contact: bcbid@gov.bc.ca

Contact the help desk by phone:

Direct: 1-250-387-7301

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

Appendix 2: Training Video Links

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

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

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

Requisition

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

Draft/Issue ITQ

1. PSB buyer locates the Sourcing Project BC Bid

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

Direct Awards

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

Analyze/Award/Close

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

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

Purchase Order

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

Appendix 4: Corporate Financial System (CFS) Resources

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

These links are owned and managed by Ministry of Finance.

[Ministry CFS Resources](#)

[iProcurement Sourcing via BCBID](#)

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Sourcing Project Roles Chart

✓ users with that role can complete the function

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

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

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

BCBid